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13. ChartHop Academy
13.1. ChartHop Academy Hub
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14. Contact support

1. ChartHop Help Center



Search for answers by pressing Ctrl+K (PC) or Command-K (Mac).



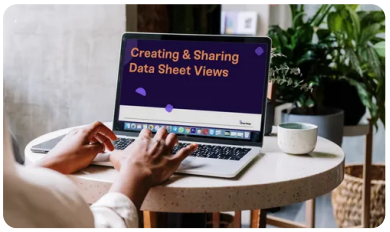
[Getting around in ChartHop]



[ChartHop for Employees]



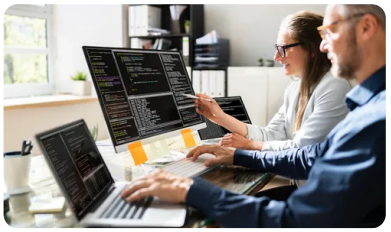
[ChartHop for Administrators]



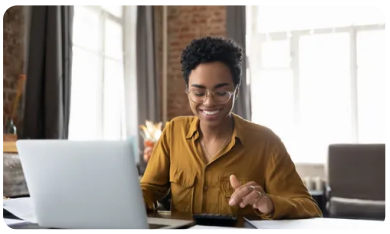
[ChartHop Video Library]



[Carrot filters and queries]

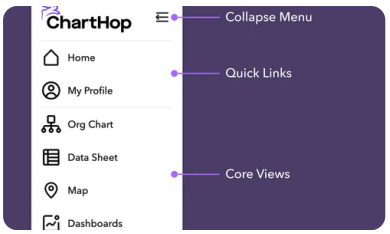


[ChartHop for Developers]



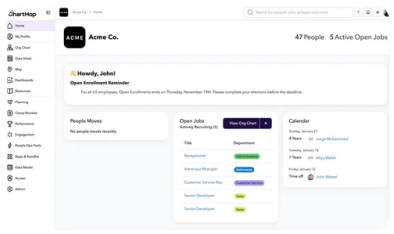
[Implementing ChartHop]

2. Getting around in ChartHop



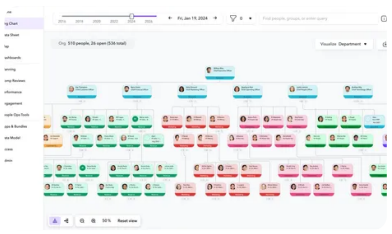
Navigating ChartHop

Get an overview of how you navigate around ChartHop.



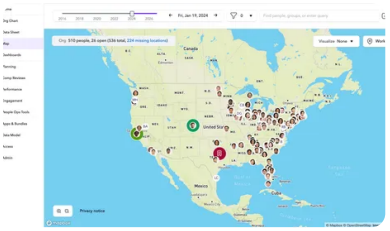
Home page

Gain an understanding of how to use ChartHop's home page.



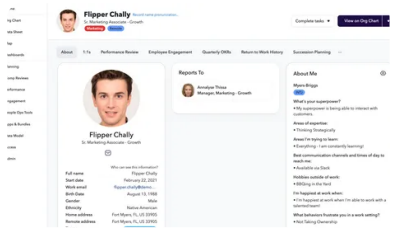
Org Chart

Review the many features of ChartHop's Org Chart.



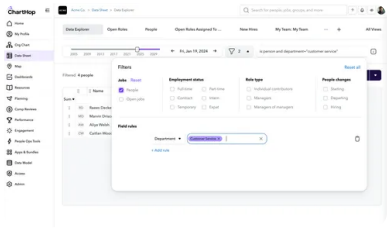
Map

Learn how to use a location-based view of your organization.



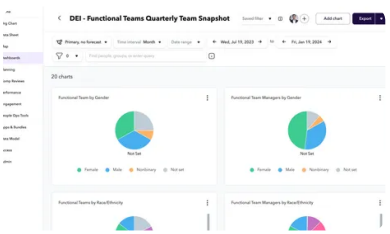
Employee Profiles

Understand how to work with and view employee profiles.



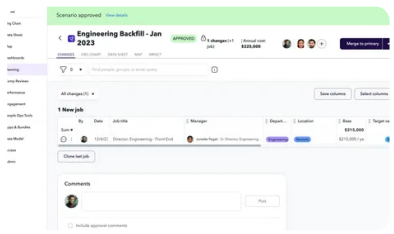
Data Sheet

Unleash the power of your employee data by learning about the Data Sheet.



Dashboards

Create and view visualizations of your



Planning

Understand how to propose org changes



Mobile App

Access a company wide employee directory on

organization's data.

with scenarios.

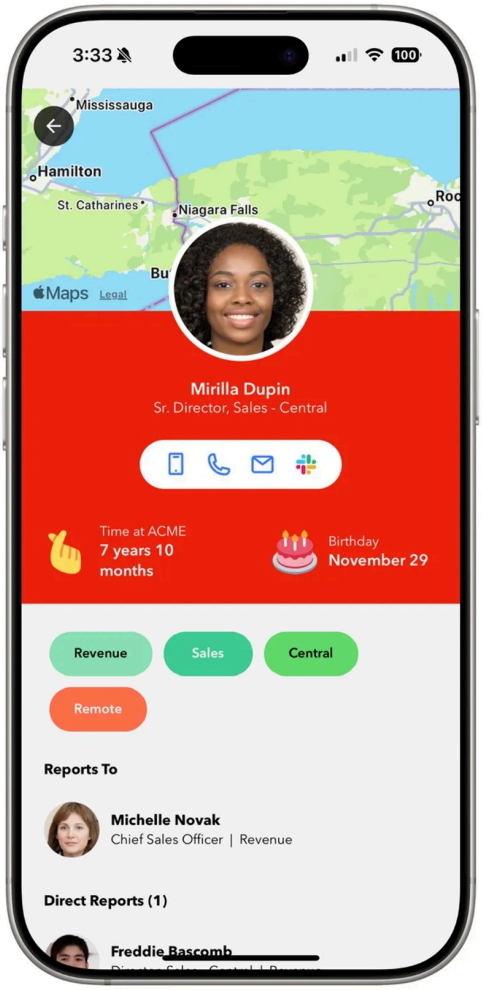
the go.

Resources (HRIS Only)

Access a library of organized content.

2.1. ChartHop Mobile App

The ChartHop mobile app for iPhone and Android is a convenient way to have access to top ChartHop capabilities on the go, including organizational directory, contact information for colleagues, complete form based tasks, request time off (HRIS only), access Ask ChartHop (HRIS only), and produce digital business cards for your phone's wallet.



ChartHop Mobile Directory App

Downloading and Installing the app

To download and install the ChartHop Director mobile app:

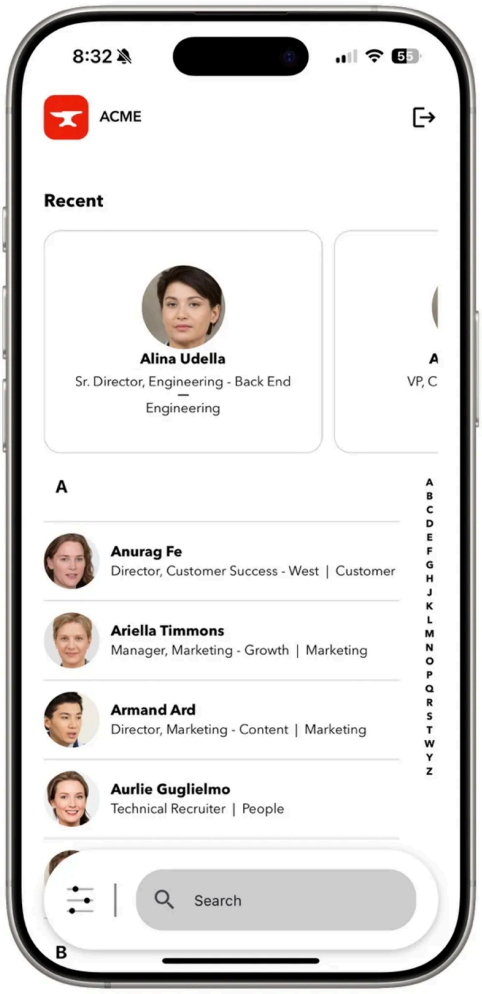
- **iPhone/iOS** - Search for "ChartHop" in the Apple App Store or go directly to this link: https://apps.apple.com/us/app/charthop-directory/id6717590153

- **Android** - Search for "ChartHop" in the Google Play Store or go directly to this link: https://play.google.com/store/apps/details?id=com.charthop.mobile

Sign In to the app

Once the app is downloaded, open it and proceed to sign in with your user credentials:

- **Email** - Start by entering in the email your account is associated with for your organization and tap **Continue**
- **Authenticate** - The app will redirect to authentication options associated with your email and organization. Choose the option that is the primary way you authenticate your account on the web.
- **Directory** - The app will then redirect on successful authentication back into the app with the alphabetized directory of your organization's people as the primary view. Note: if you have more than one account associated with your email, you will be dropped into the primary account associated with your email



List View

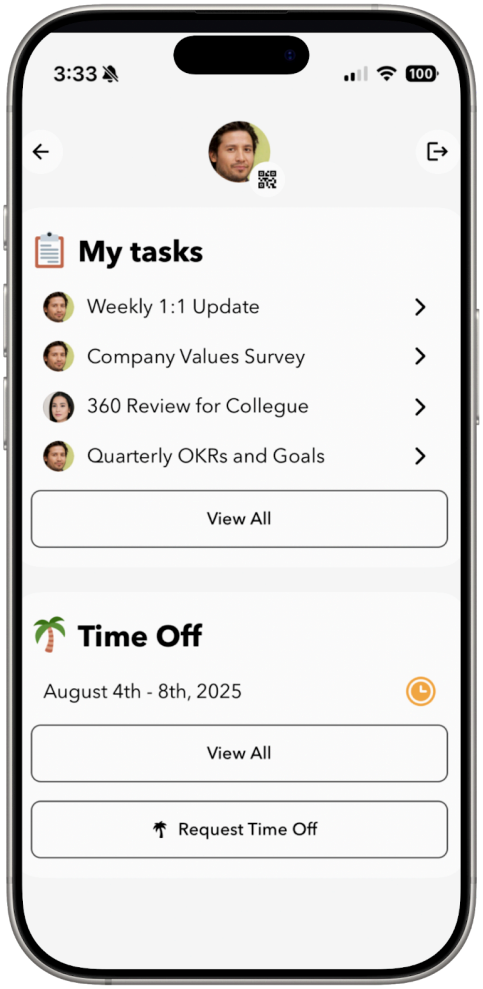
Features of the Mobile Directory

Within the app, you can:

- **Scroll throught the list of People in your Organization** - People in your organization or sorted alphabetically. You may scroll through them by:
  - Tap and dragging on the list of people
  - Tap and dragging on the letters on the right of the list
  - Tap and press on a letter on the right of the list
- **Search and Filter** - To find a specific person in the list, you can:
  - Search for them by name in the search field
  - Tap on a Department, Location, or Team tag that the individual is a part of
    - Within each grouping of Department, Location, or Team, the tags work as OR filters, meaning the employee could be part of one or more of the tags you select

        - Across multiple groupings, the results work as AND filters, meaning the employee meets at least one of every set of selected tags in each section
    - To clear out the filters
        - You can either tap on all selected tags and/or clear out the search name
        - Top the reset icon in the upper right of the filters
- **View Profiles and contact colleagues** - Once you tap on a person in the list, you will view that person's profile. The profile contains:
    - Name
    - Title
    - Contact options with links to each available format
        - Mobile Phone - will provide options to text or call
        - Work Phone - will provide options to text or call
        - Email - will open your default mail application with an email initiated directed to this person
        - Slack - will open the DM channel in Slack to this person
    - Tenure, or how long they have been at the organization
    - Birthday
    - Tags for Department, Location, and Teams the person is on
    - Who the person reports to
    - Who reports to this person
    - Job Description for their role
- **View Another Profile** - from the profile, you may view a different profile by:
    - Tapping directly on a person listed as their manager or one of the people that reports to them
    - Or you may view a list of profiles by:
        - Tapping one of the tags of Department, Location, and Team
        - Tapping the back arrow on the top left
        - Swiping left to right on the profile view
    - Once you have viewed a profile, it will be featured in the Recent section at the top of the Directory list

- Change Organizations - If you have access to more than one organization, you can switch organizations by clicking on the logo of the current organization and then selecting a different one from the list
- **Controlling What is Visibile to Other Employees in the Mobile App**
    - Depending on Company Policies and how they are set up in ChartHop, some information can be shared that you may want to keep private like Mobile Phone. You can change the settings to some infomation by editing your profile in ChartHop web app.
    - Follow these instructions to make your information visibile (**Public**) or not-visible (**Private**). Control what people see on your profile



My Tasks and Time Off

Task Based Forms

Within the app, you can:

- **Notice in-app alert indicators to understand how many Tasks are due** - Overlaid on the user's profile avatar in the upper right, if there are tasks due, a numeric indicator

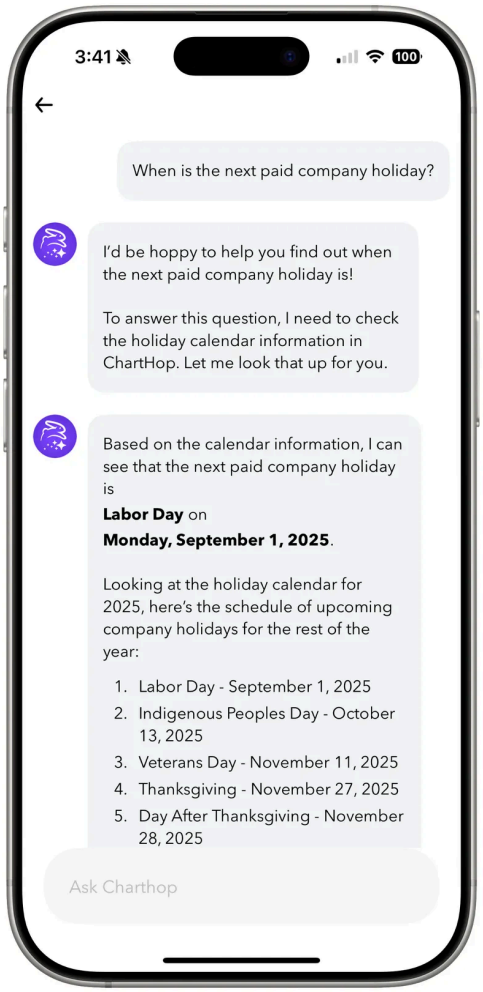
will show how many are outstanding.

- **View the list of pending Tasks in My Tasks** - Any new or outstanding Tasks will be listed in the My Tasks list.
    - Selecting one of the tasks will navigate to the associated form
        - User can complete the form in the mobile app
        - User can start the form in the mobile app and finish on the web version of ChartHop
        - User can start in the web version of ChartHop and then finish in the mobile app
    - Once all the tasks are complete, the My Tasks list will no longer appear

Time Off

If Time Off is enabled in ChartHop (HRIS only), the user will be able to request and approve Time Off in the mobile app.

- **Pending Time Off requests** - Selecting the avatar in the upper right of the app, will bring you to the My Tasks / Time Off view. In the lower half of the view, all current requests and approved future Time Off events are listed.
    - Pending Time Off requests show an orange clock to indicate it is still waiting for approval
    - Approved Time Off requests show a green check to indicate request was approved
    - Denied Time Off requests show a red X to indicate request was denied
- **To Request Time Off** - Select the Request Time Off button on the My Tasks / Time Off view. Select the dates, policy, and add notes.
- **To Approve Time Off** - Approvals will appear in the My Tasks / Time Off view. Select the request, review the information, and approve or deny the request
-



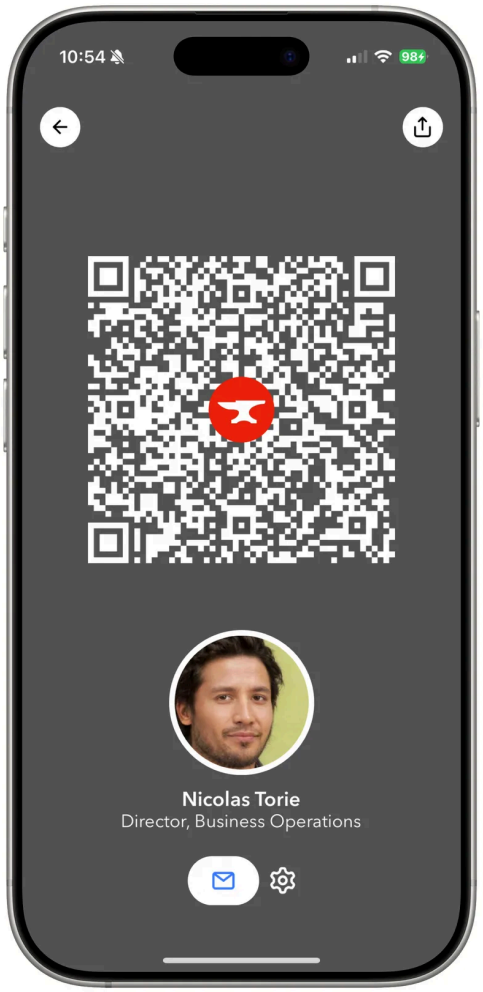
Ask ChartHop

Ask ChartHop

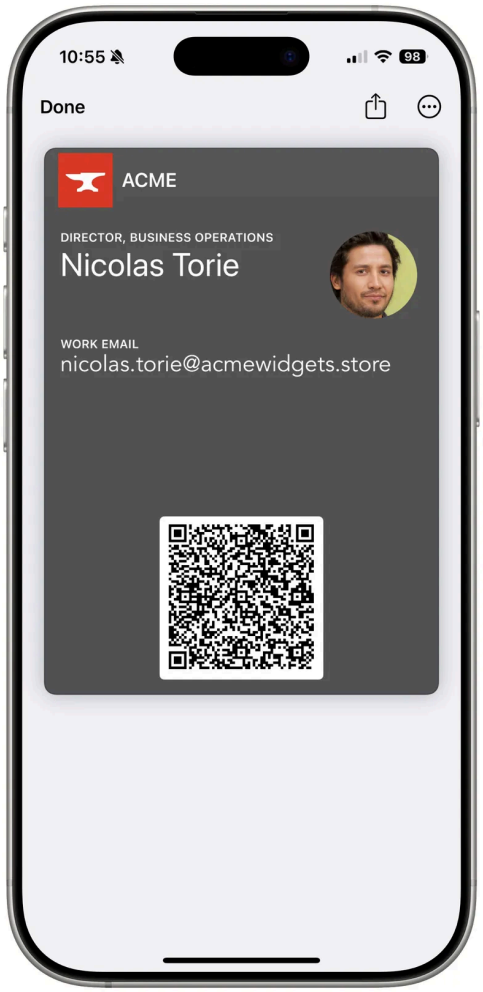
If Ask ChartHop is enabled in ChartHop (HRIS only), the user will be able to access the mobile version of Ask ChartHop in the mobile app

- **Start a New Chat with ChartHop AI** - Select the Ask ChartHop icon (bunny hopping over stars) next to your avatar in the main view. Type in any question or request you may have.
- **Ask ChartHop will answer the question or request** - Even if the request requires access to data not avialable in the mobile app, as long as the information is in the web app, Ask ChartHop can retrieve the needed data and synthesize a response.
    -

Digital Business Cards



Digital Business Card in ChartHop Mobile App



Digital Business Card in phone's Wallet

- **Share Your Business Card** - take digital business cards with you where you are
  - Business Cards are created with:
    - Your organization's logo and brand colors
    - Your avatar
    - Your name, title, org shared contact info
  - You may access your business card by:
    - Within the ChartHop Mobile App, tapping on the QR symbol in your profile view
    - If you have already added it to your Apple or Google Wallet, it will be included as one of your cards
      - To add your Business Card to your Apple or Google Wallet, navigate to your business card and then tap the gear icon below your profile photo.
      - Now select which information you would like to be included in your Wallet version of your business card and tap "Add to Wallet"

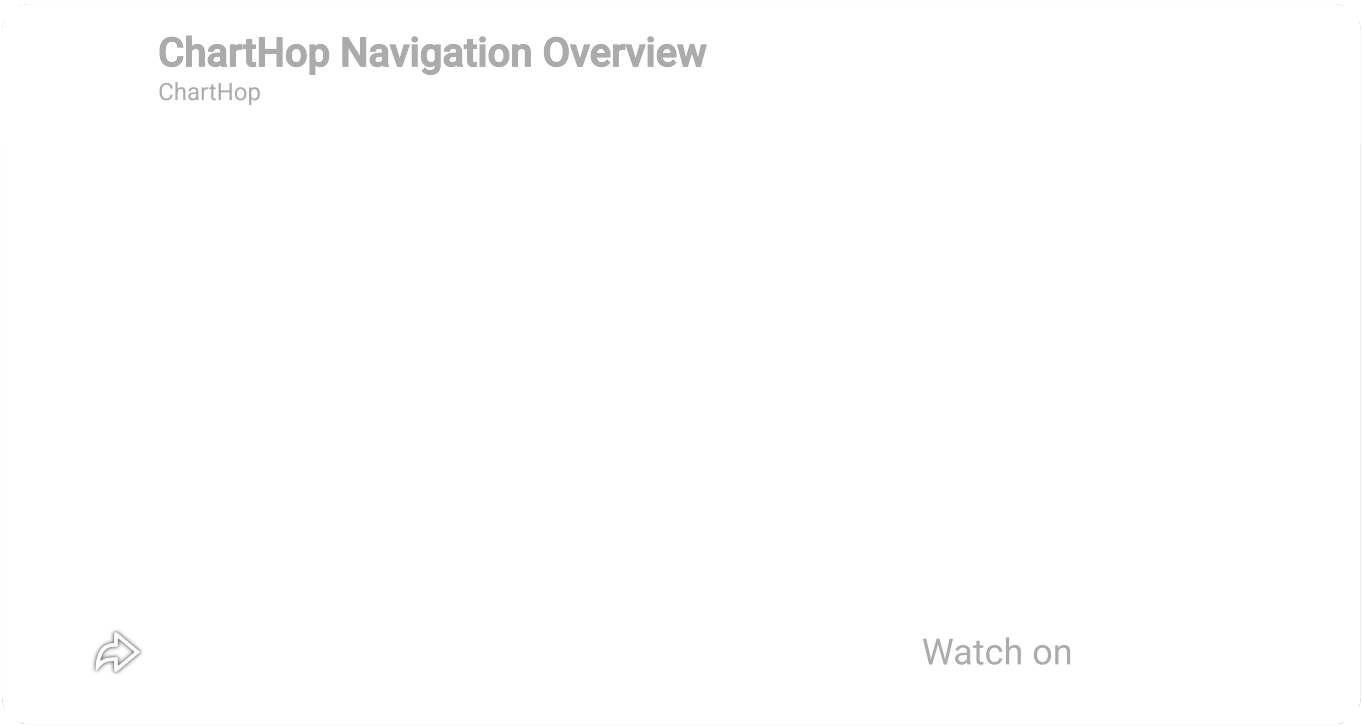
        - If you have already added your Business Card to your Wallet, you will need to remove it before adding an updated version
    - You may share your business card by:
        - From within the ChartHop Mobile app, view the business card and tap the share icon
        - From within your Apple or Google Wallet, view the business card and tap the share icon

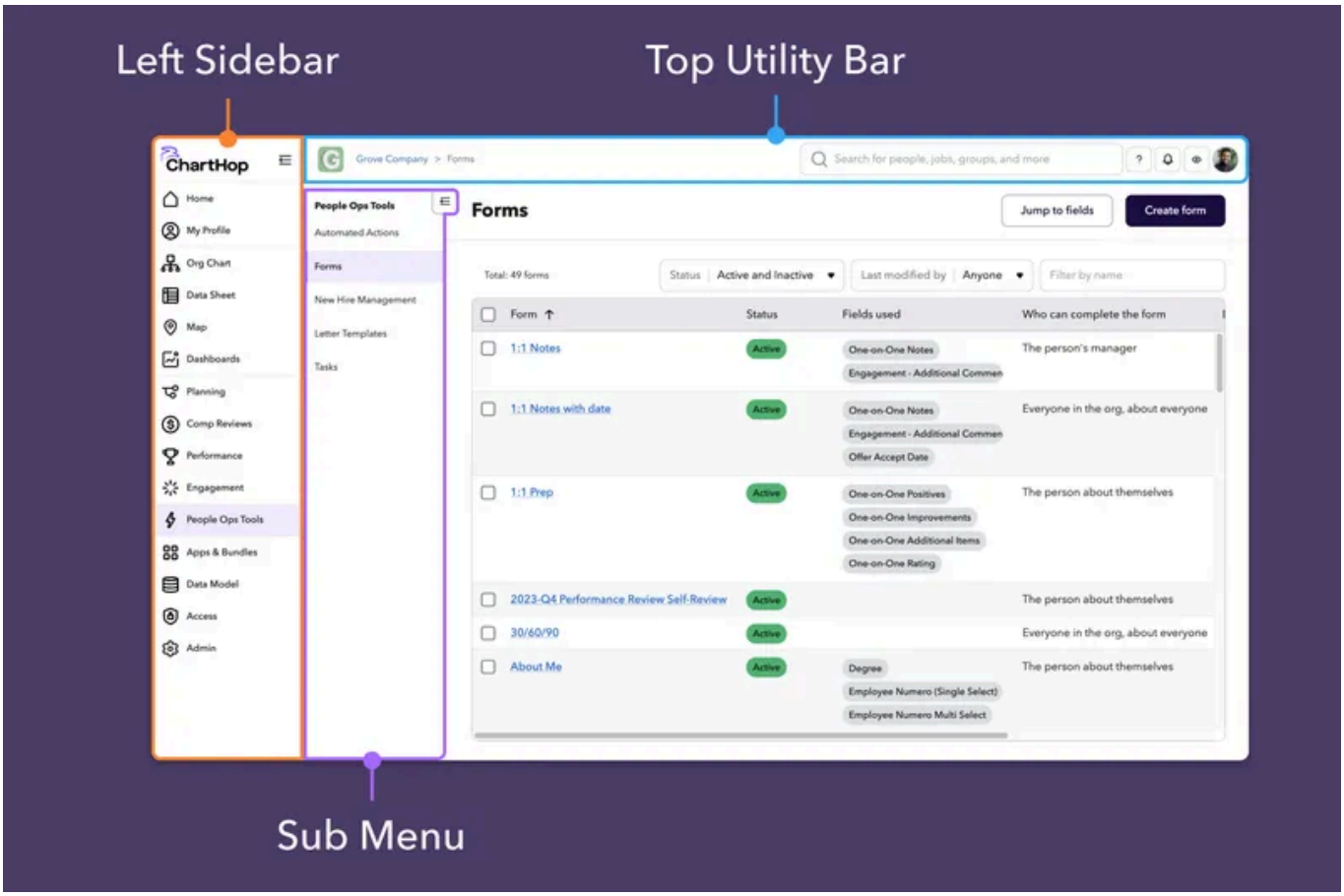
2.2. ChartHop Video Library

Use the following videos to quickly learn how to use some of ChartHop's main pages:

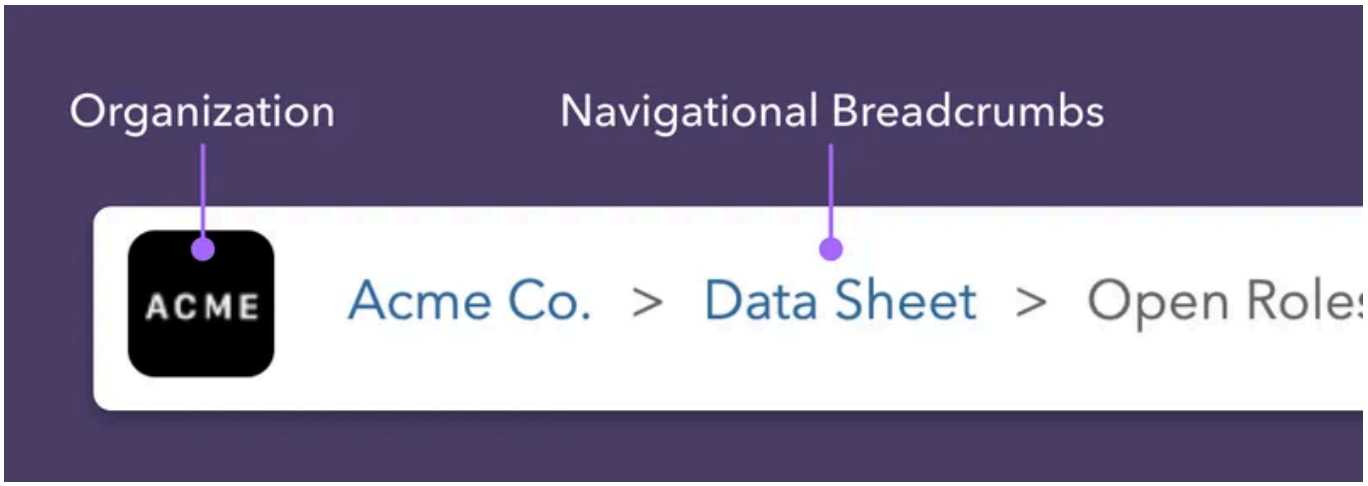
- **Navigating Your ChartHop Org Chart** (4 min)
- **How to Use Your ChartHop Map** (5 min)
- **Understanding Employee Profiles** (3 min)
- **How to Use ChartHop's Global Search** (2 min)
- **Creating and Sharing Data Sheet Views** (4 min)
- **Customizing Your Data Sheet** (4 min)
- **How To Use ChartHop's Homepage** (2 min)
- **From Planning to Recruiting in ChartHop** (6 min)

2.3. Navigating ChartHop



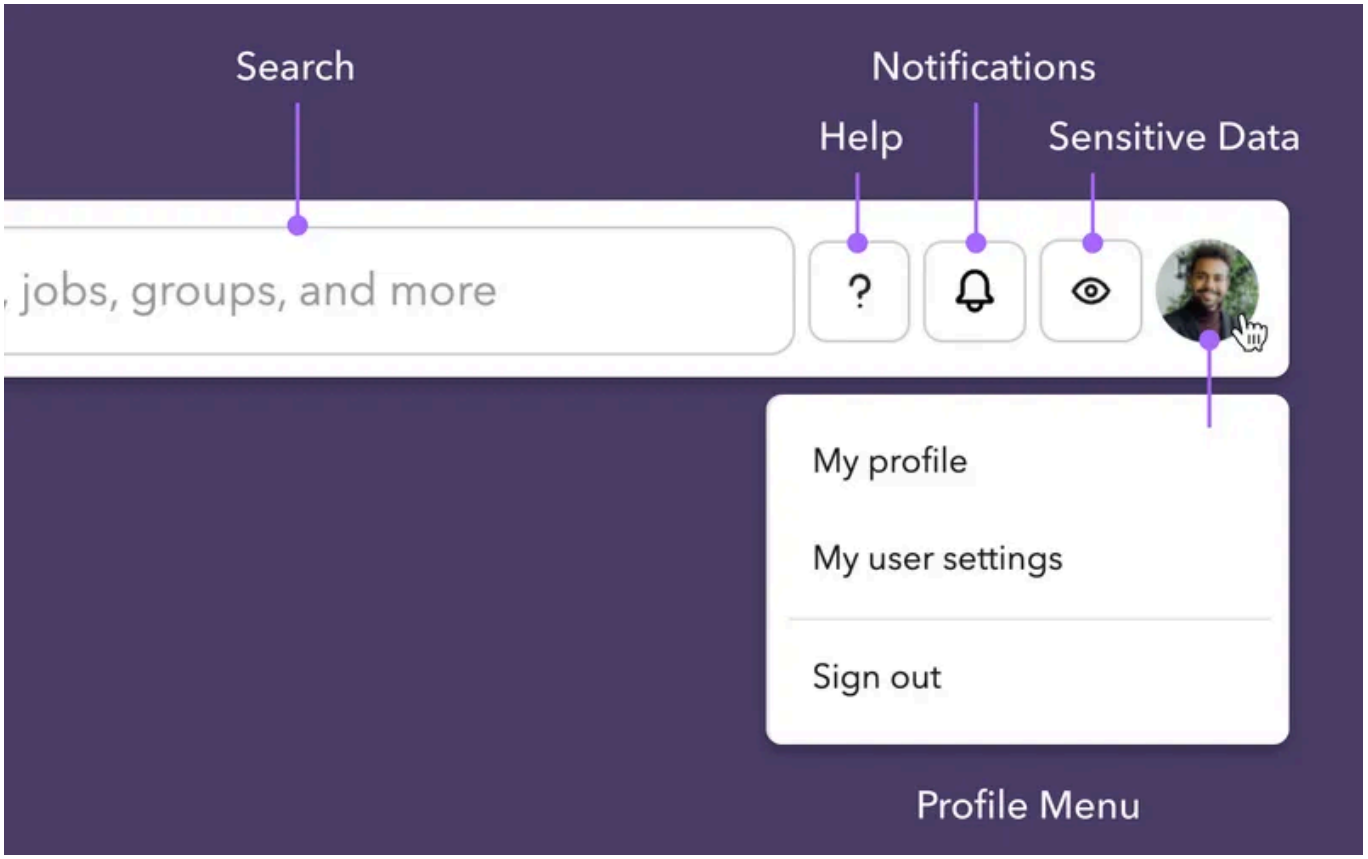


Top Utility Bar



Top Utility Bar

- **Organization** - the org you are currently viewing
- **Navigational Breadcrumbs** - Help you locate where you are in the app and go back to previous pages



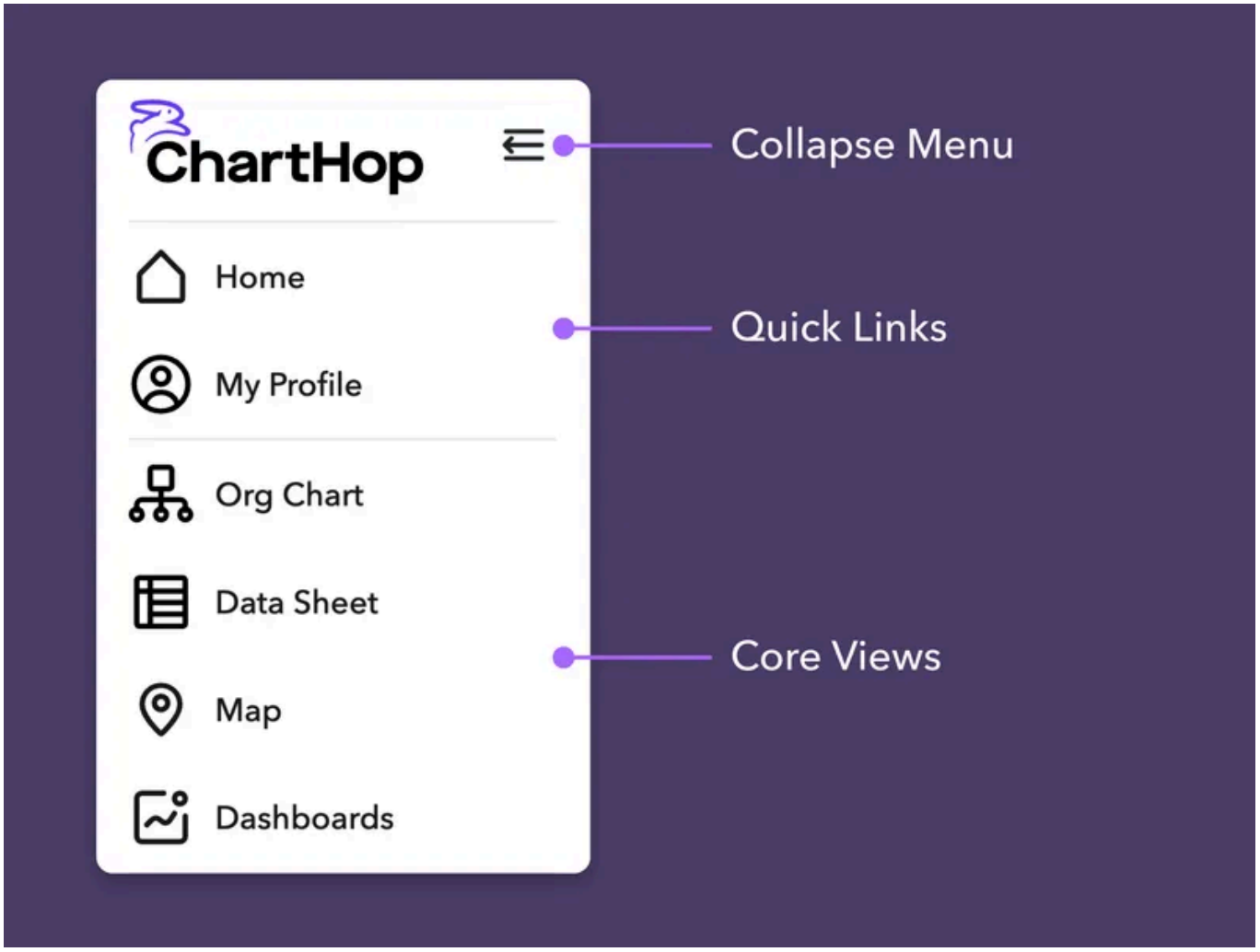
Top Navigation

- **Search** - Find people, jobs, groups, scenarios and reports (Ctrl/Cmd+K)
- **Help** - Search docs, watch videos, ask AI or contact support
- **Notifications** - Alerts about your account

- **Sensitive Data** - Hide or Show sensitive data. This can be useful when screen sharing or using ChartHop in a public setting.
- **Profile Menu** - click the profile picture
  - **My Profile** - quickly go to your profile
  - **Edit your user settings** - change your picture, password or other settings
  - **Sign out**

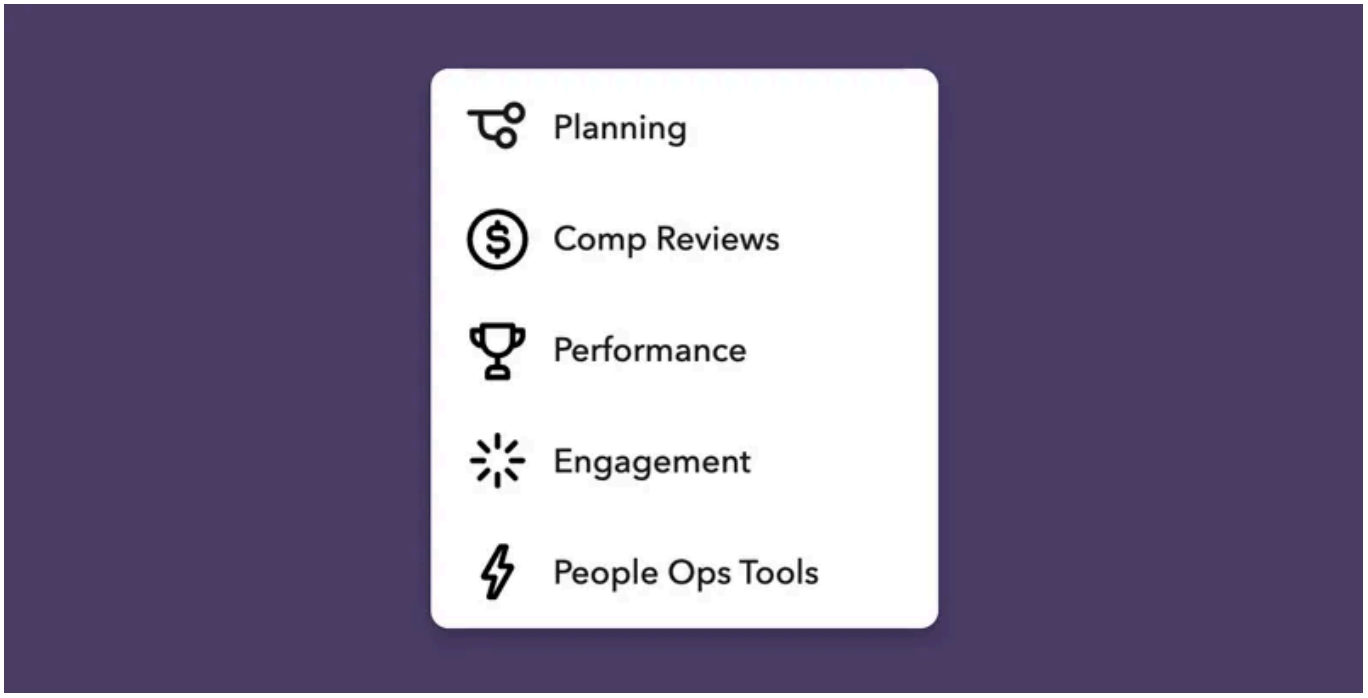
Left Sidebar

> Left and sub-nav options will not look the same for everyone and will depend on:
> Access role and permissions
> ⚙ Account configuration
> Modules your organization subscribes to



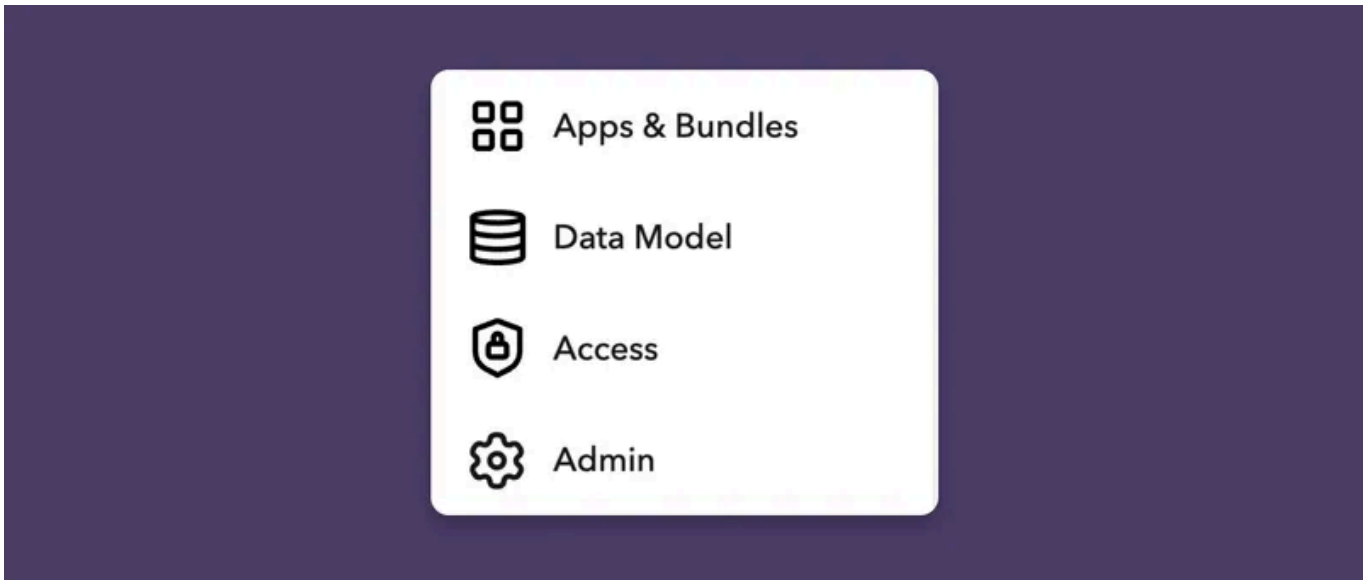
Left Sidebar

- **Collapse Menu** - Toggle between showing and hiding the menu item names
- **Home page** - View announcements, tasks, and other relevant information
- **My Profile** - Quickly go to your profile to complete forms or view profile tabs
- **Org Chart** - Explore your organization's hierarchy
- **Data Sheet** - View people and job data in a customizable table format
- **Map** - View people's work location on a map
- **Dashboards** - View aggregated charts (formerly known as Reports)



Left Sidebar

- **Planning** - Model scenarios and submit proposed org changes for approval (formerly known as Scenarios)
- **Compensation reviews** - Participate in or set up a compensation review
- **Performance reviews** - Configure and distribute performance reviews
- **Engagement surveys** - Configure and distribute engagement surveys
- **People Ops Tools** - Executing a variety of operational processes using these tools



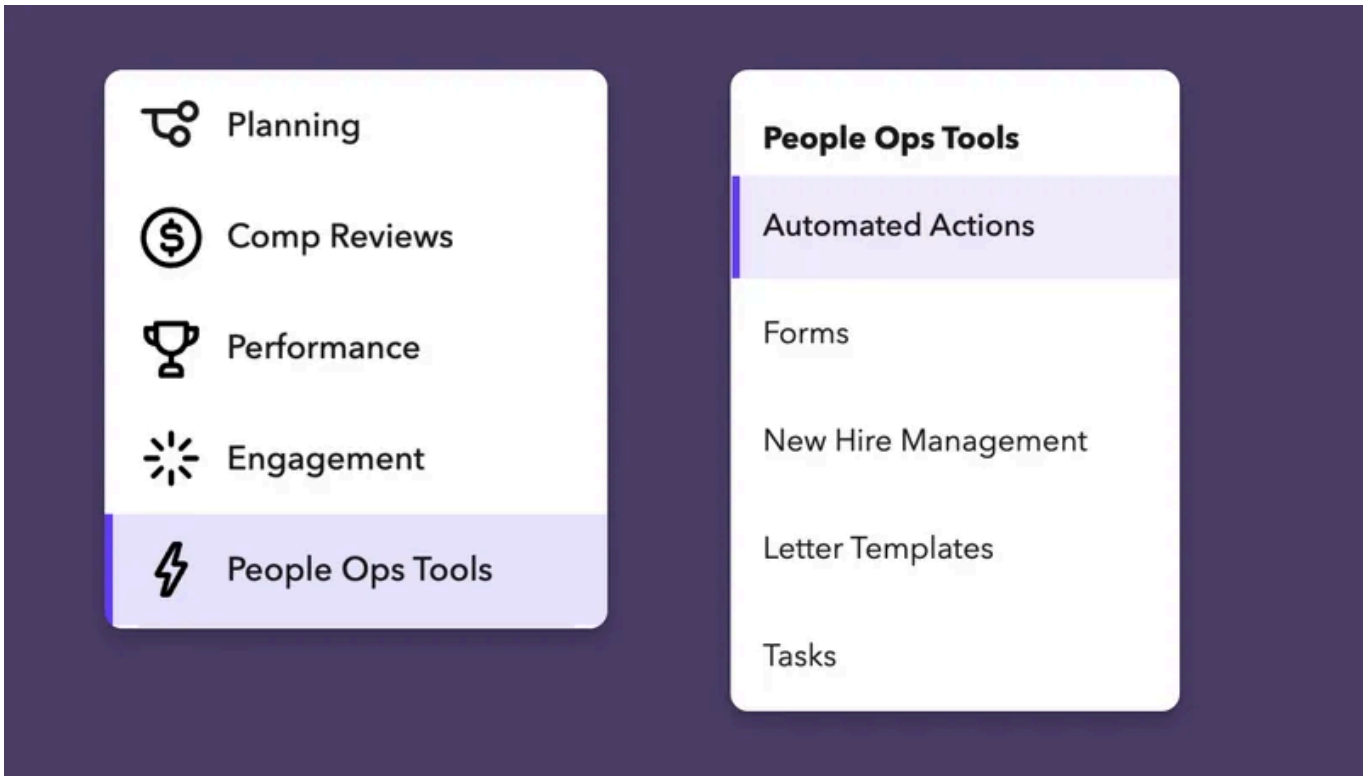
Left Sidebar

- **Apps & Integrations** - Manage integrations and add or remove bundled templates
- **Data Model** - Configure field, groups, and job architecture
- **User access controls** - Configure and control who has access to what data
- **Admin** - Configure your settings and other admin tools

Sub-Menu

People Ops Tools

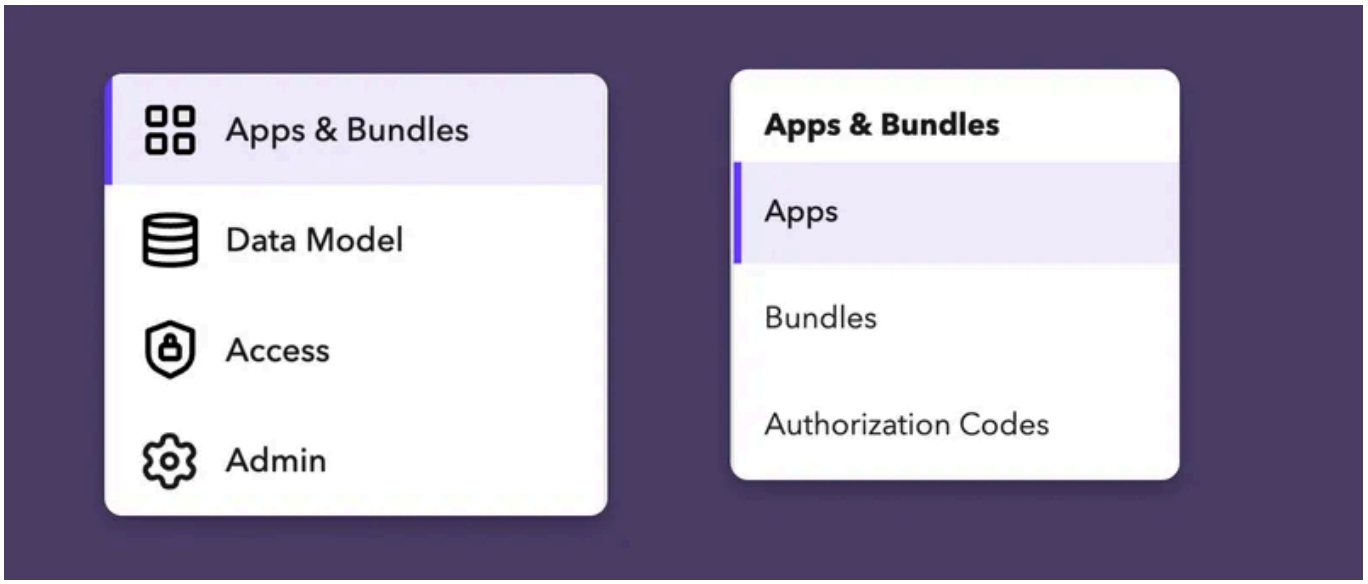
- Automated Actions
- Forms
- **New hire management**
- **Letter templates**
- **Managing tasks**



People Ops Tools

Apps & Bundles

- Apps & Integrations
- Bundles

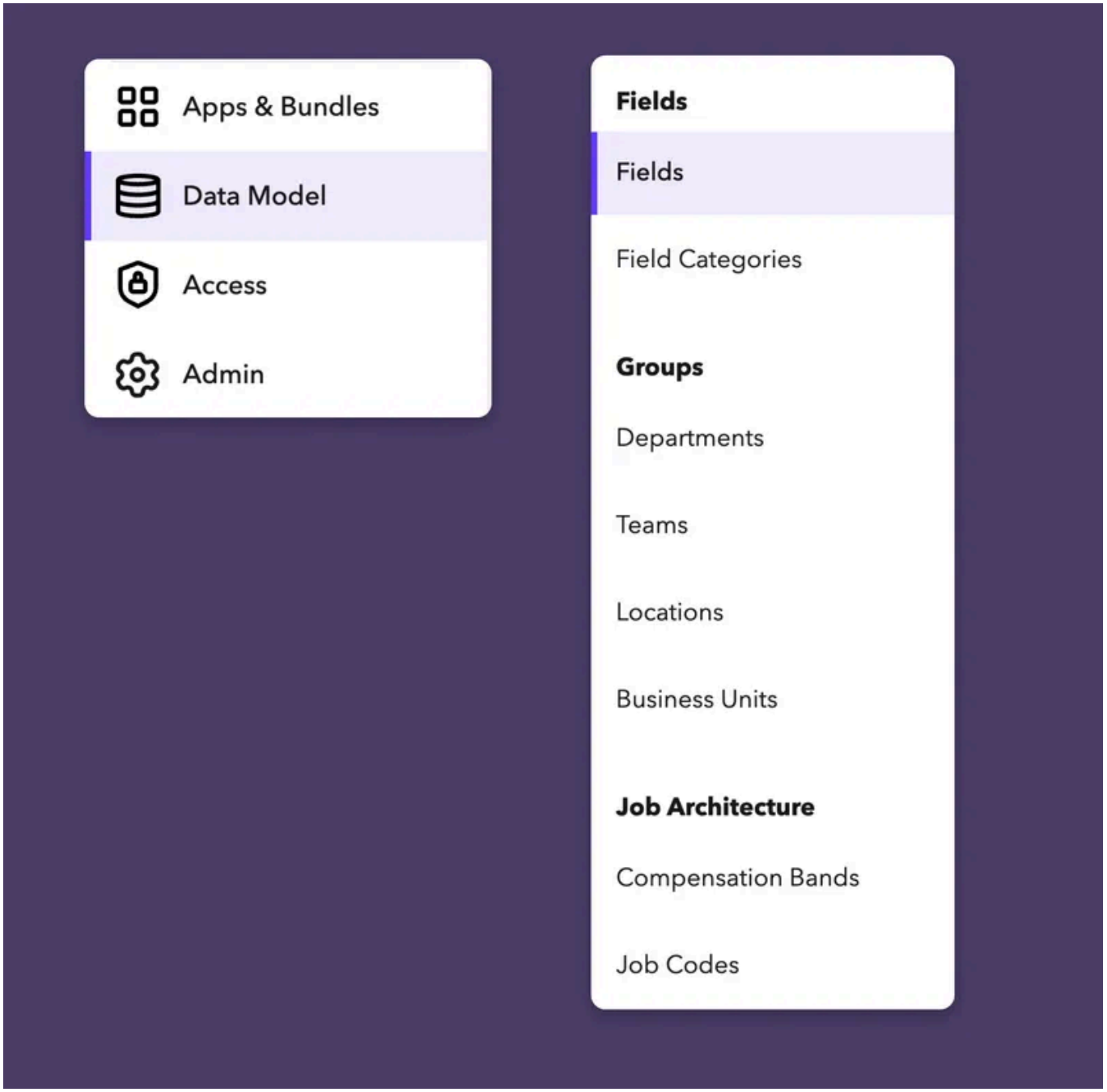


Apps & Bundles

Data Model

- **Fields**
  - Creating custom fields

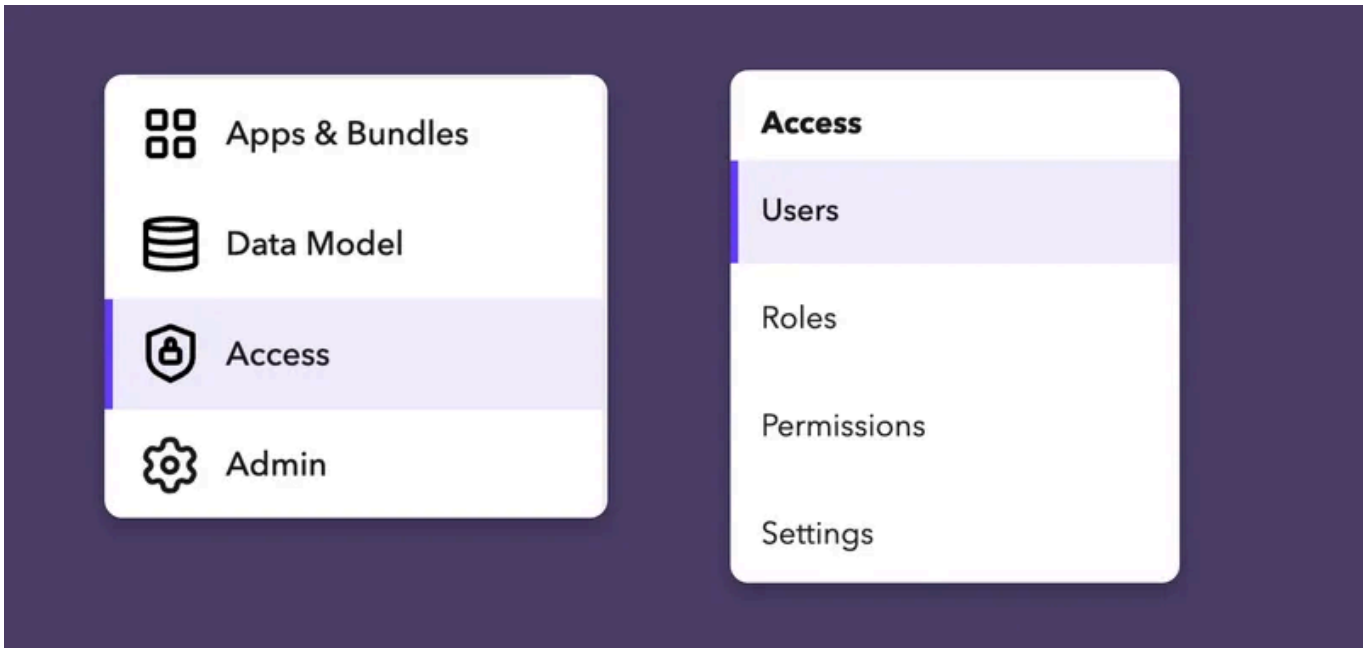
    - Categories
- Managing groups
    - Departments
    - Teams
    - Locations
- Job Architecture
    - Compensation bands
    - Job codes



Data Model

Access

- User management
- Built-in Roles
- Defining a custom permission
- Access Settings

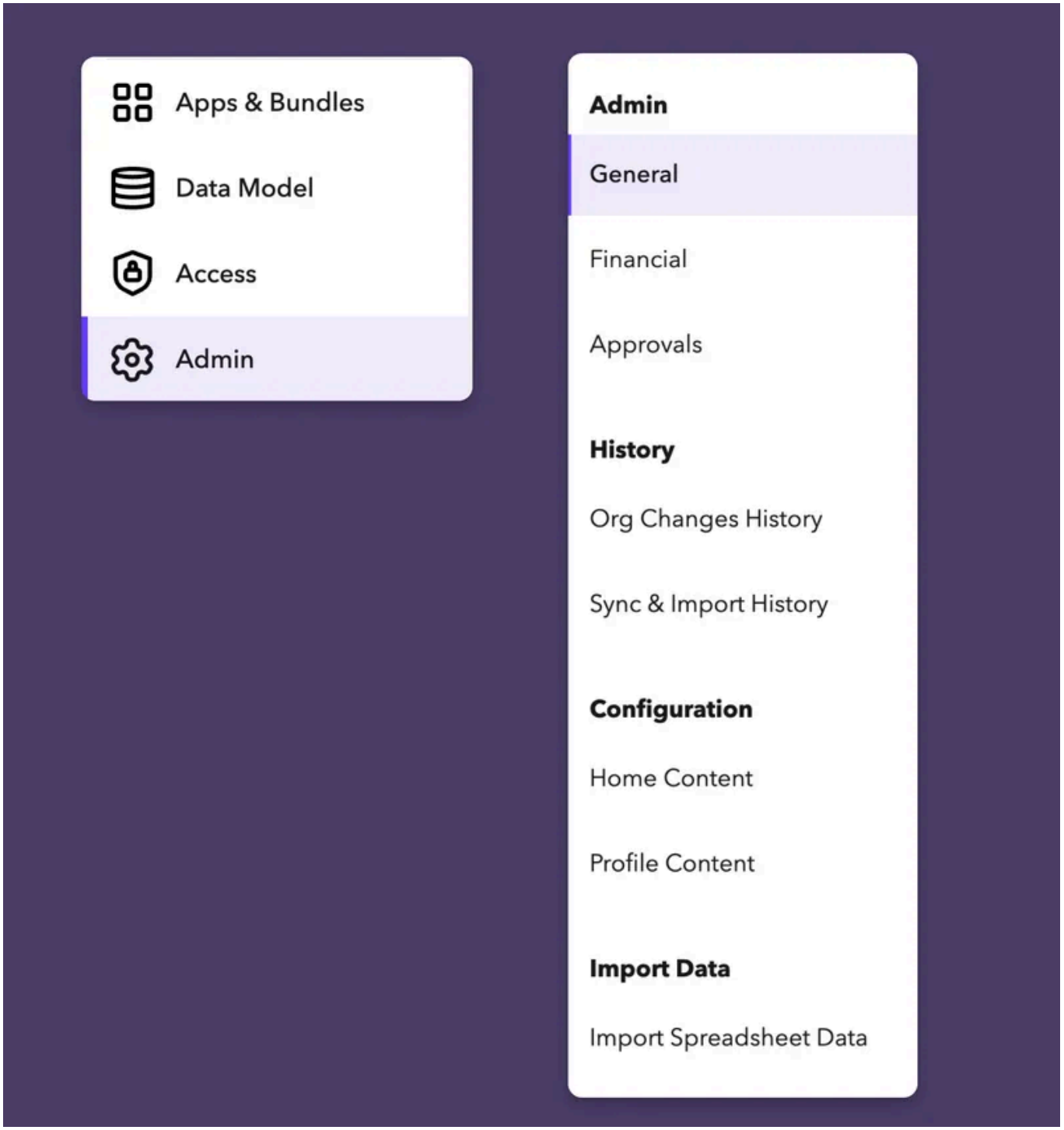


Access

Admin

- **Admin**
  - Configuring financial settings
  - Financial - Set custom currency rates and Setting up Stock valuations
  - Enabling approvals
- **History**
  - Org Changes History page
  - Sync history
- **Configuration**
  - Configuring the Home page
  - Add content to custom profile tabs
- Import Data

- Importing spreadsheet data



Admin

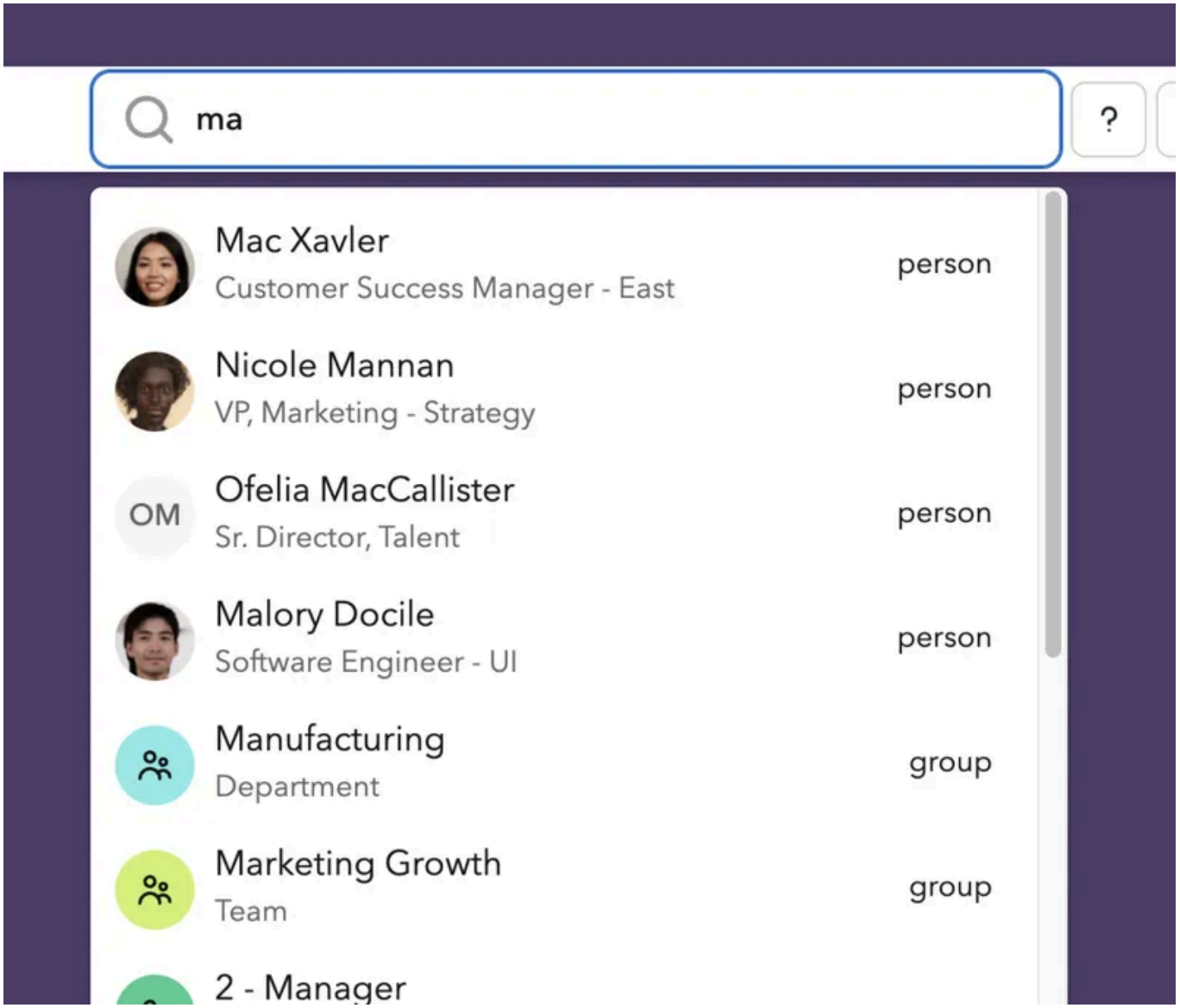
Additional Navigation Options

- View as another user - Allows you to preview ChartHop as another person sees it.
  - Top Bar → Profile Menu
- **Org Switcher** - If you have a sandbox or multiple organizations
  - Location: Top Bar → Org Logo

Search bar

ChartHop's universal search module gives you the ability to quickly find jobs, people, departments, locations, and more. You are able to search by preferred first name, first name, preferred last name, last name, or email.

Click the search in the Top Utility Bar or use `⌘+k` on a Mac or `ctrl+k` on a PC to bring up the search bar from anywhere.



Search Bar

2.3.1. ChartHop terminology

ChartHop uses a common terminology to represent your organization and take actions within ChartHop itself. Below is a list of key terms that you'll need to understand.

Person

A **person** is a current, future, or former member of an organization.

Job

A **job** is a specific function within your ChartHop org that has a level, salary, and hierarchical position associated with it. There can only be one person in a given job at a time.

Jobs come in two states:

- A **filled job** is a job that currently has a person assigned to it.
- An **open job** is a job that exists in the org chart but does not have a person assigned to it — for example, a new role that is being recruited for, or a backfill after someone departs.

Jobs must have exactly one direct manager. They may also have one indirect manager. An indirect manager is represented by a dotted line on the org chart.

In most cases, there will always be exactly one head job in the organization. If your org has co-CEOs, email our support team (**support@charthop.com**).

User

Users are authorized individuals who can access ChartHop. A user often corresponds to a person in your organization, but not always. For example, you might want to invite an external consultant to your ChartHop instance. Although it's rare, users can have access to multiple instances simultaneously.

All access to ChartHop is tied to a user, even API-level access. For example, if you are building an API-based integration with ChartHop, an **app user** will be created in ChartHop that corresponds to the level of access required by the integration.

Group

A **group** is a method of categorization that allows jobs to be segmented by a variety of important groupings. Jobs can belong to multiple groups, such as *departments*, *teams*, *locations*, and *bands*. For example you can create multiple overlapping teams to represent different cross-functional groups, sales territories, or areas of responsibility.

Change

Any **change** that is made to a job is recorded in your organizational history. There are several types of changes listed below.

- **Create** - a job is created.
- **Update** - a change is made to a job, such as new manager, compensation, title, or other fields.
- **Data** - data is collected, such as a form being filled out.
- **Delete** - a job is removed from the org chart.
- **Hire** - a person is hired into a job.
- **Depart** - a person leaves the organization; departures can either be *voluntary* or *involuntary*.
- **Move** - a person moves from one job into another open job, such as an internal transfer.

At its core, ChartHop is a record of changes. You can hop to any moment in time and ChartHop will replay the changes for exactly that moment in organizational history, and you can always propose a new set of changes. Those with appropriate access can edit the history of changes, such as altering a start date or even cancelling a change retroactively.

Scenario

A **scenario** is a proposal for a set of changes to the organization. For example, a hiring plan, or a proposal for a reorganization, is a scenario. Scenarios can be shared privately, and while anyone can create a scenario, a scenario is not live until it is "merged" by an approved user into the primary org chart.

Field

Users with the right permissions can create any number of ***custom fields*** with different datatypes that can help you gather information about your organization. You can include these fields in forms such as an employee survey or another custom form. You can control access to the data collected by setting data sensitivity rules. Data collected can be used in reports.

Form

You can also create **forms** that collect data. You can build a form with any number of custom fields that you create. Use forms to collect self-reported data, such as performance review, custom user profiles, or happiness surveys.

2.3.2. Markdown formatting

ChartHop uses a standardized text format called Markdown.

You can use Markdown across the application for styling content such as job descriptions, department / team pages, creating custom forms, or the *dashboard bulletin*. If you need to **bold,** *italicize,* underline, or style content in any other way, Markdown is the best way to do it in ChartHop.

Here are some of the most commonly used Markdown format rules.

Style	Syntax
Bold	**Bold**
Italic	*Italic*
Hyperlink	[link text](https://www.example)
Image	![alt image text](https://www.example.png)
Image with link	![https://www.example](https://www.example.png)
Header 1	# H1
Header 2	## H2
Header 3	### H3
Header 4	#### H4
Ordered List	1. First item 2. Second item 3. Third item
Unordered List	- First item - Second item - Third item
Blockquote	> blockquote
Horizontal Rule	---

For more advanced Markdown tips, **here** is an external resource.

2.3.3. Filtering data

You can filters to refine your view of your organization. You can use basic filters or add expressions to fine-tune your filter. Filtering is available on many of ChartHop's pages.

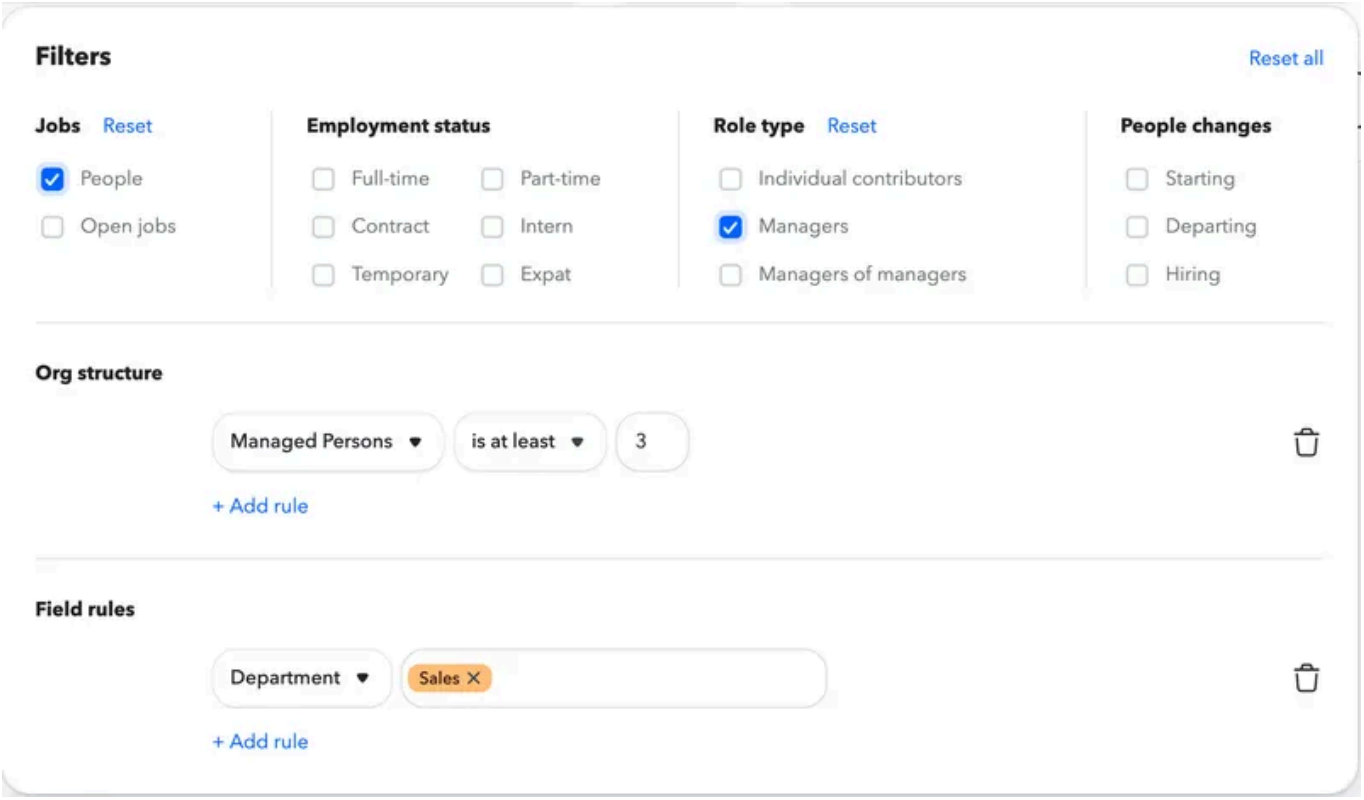


Creating a filter

You can choose from a few popular fields when creating a basic filter. Basic filters allow you to filter by the following:

- Jobs
- Employment status
- Role type
- People changes

To build more complex filters, you can add expressions based on your organization's structure or rules based on field values. For example, you could build a filter that lists all people who are managers, who have more than three direct reports, and are in the sales department, as shown below.



To create a filter:

1. Select the filter icon at the top of a page to view the **Filters** dialog.
2. In the **Filters** dialog, select one or more of the check boxes shown to start building your filter. If you don't want to use any of the common fields, leave the check boxes blank.
3. Add an **Org structure** rule. Choose a filter from the **Choose** drop-down list, choose an operator, and then choose a value. For example, *Managed Persons is at least 3* will return all people who have at least three direct reports.
4. Add a field rule to include additional fields in your filter that are not included in the lists above. For example, you can select **Department** and then enter the name of the department that you want use to filter.
5. Optionally, you can select **Add rule** to use multiple rules for your filter. When you use multiple rules, you need to choose between using an AND operator which means both rules have to be met or an OR operator which means either rule can be met.
6. Select outside of the **Filters** dialog to save your changes and view your results.

> Use the Trash can icon to delete a rule you don't need.

Using Carrot queries to filter

You can build queries with Carrot, ChartHop's query language, to configure filters that are more complex than what you can do with the Filters dialog.

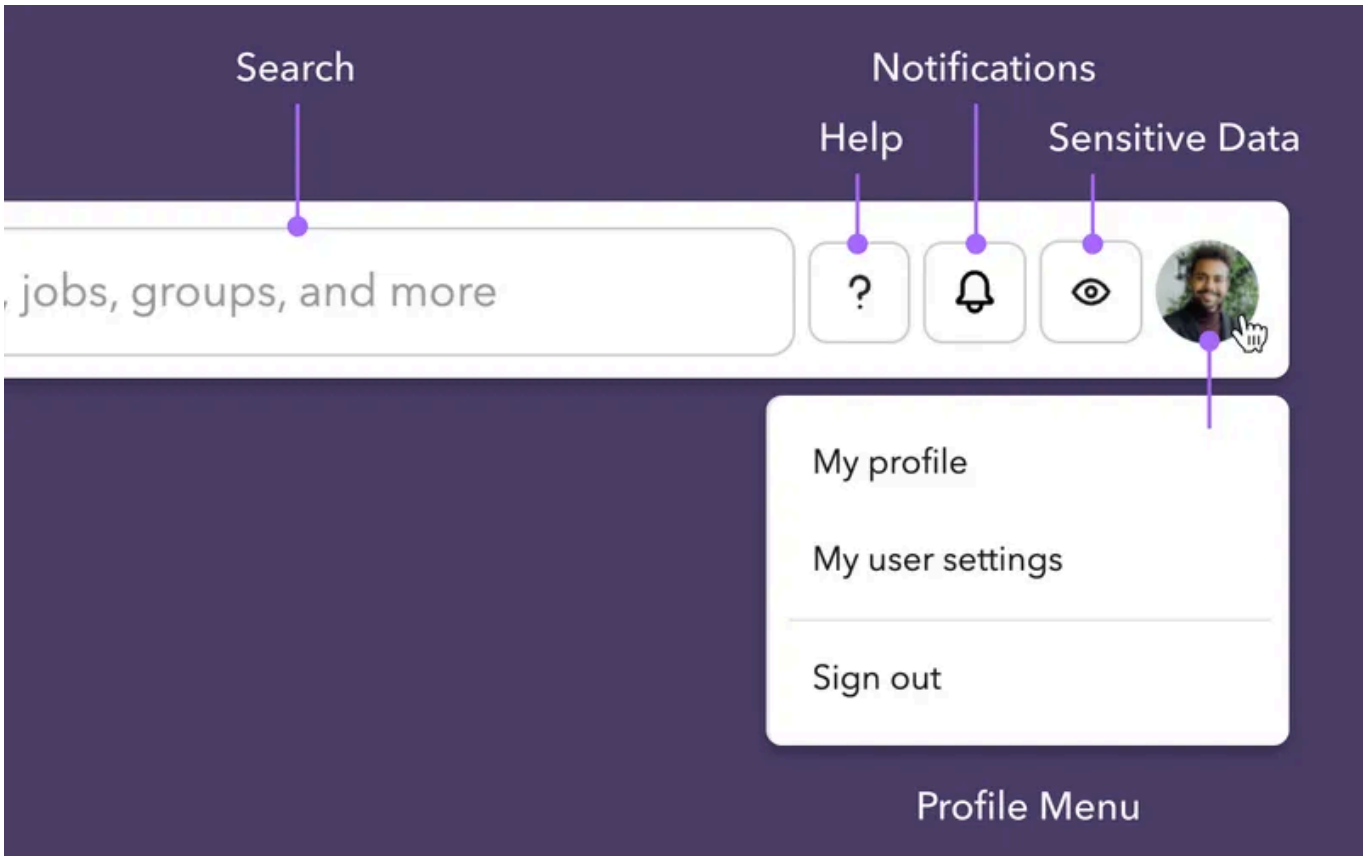
You can enter queries in the Search box which available on most ChartHop pages. **Learn more.**



2.3.4. Hiding sensitive data

To hide sensitive data within ChartHop, click the eye icon on the top utility bar to tooggle it to **hidden**.

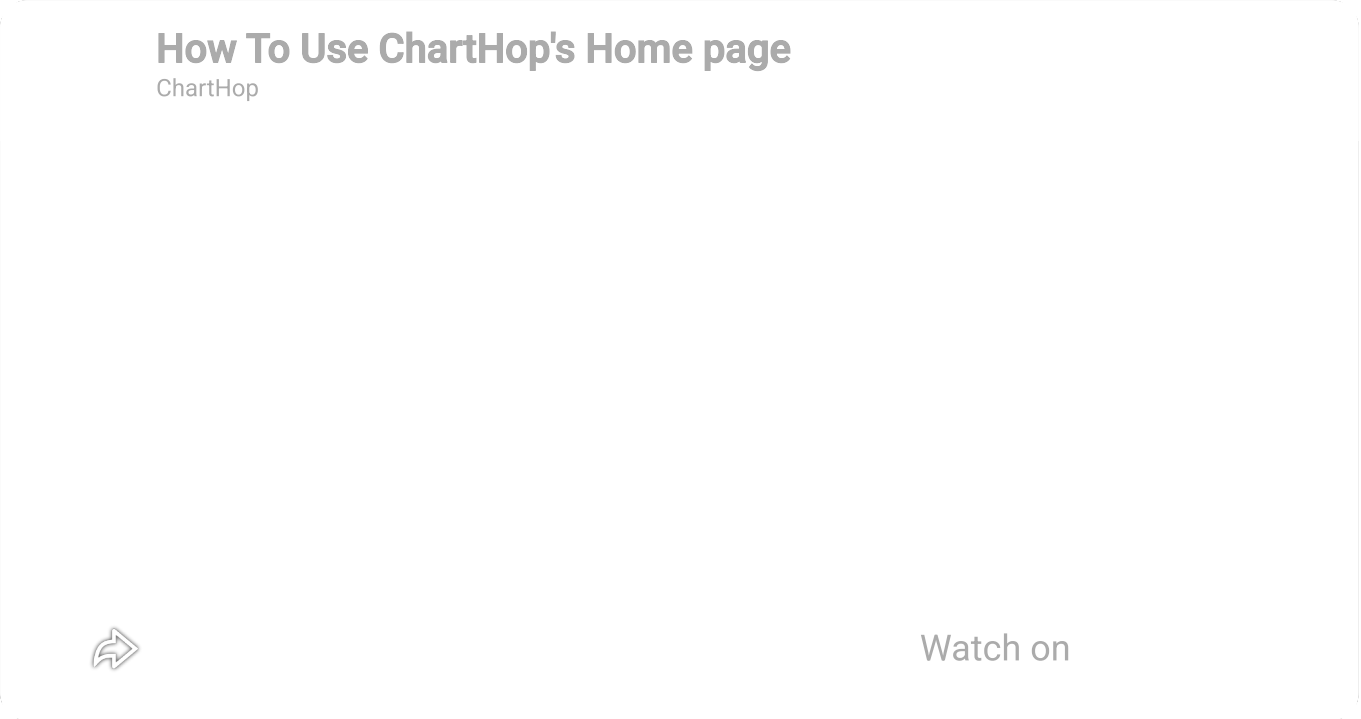
When you toggle the eye icon to **hidden** (slash through eye icon), sensitive data does not display on screen. You can use this toggle to help protect sensitive data (for example, when sharing your screen with others).



Please consult our **Privacy policy** for more information about how we protect your sensitive data and how it is used.

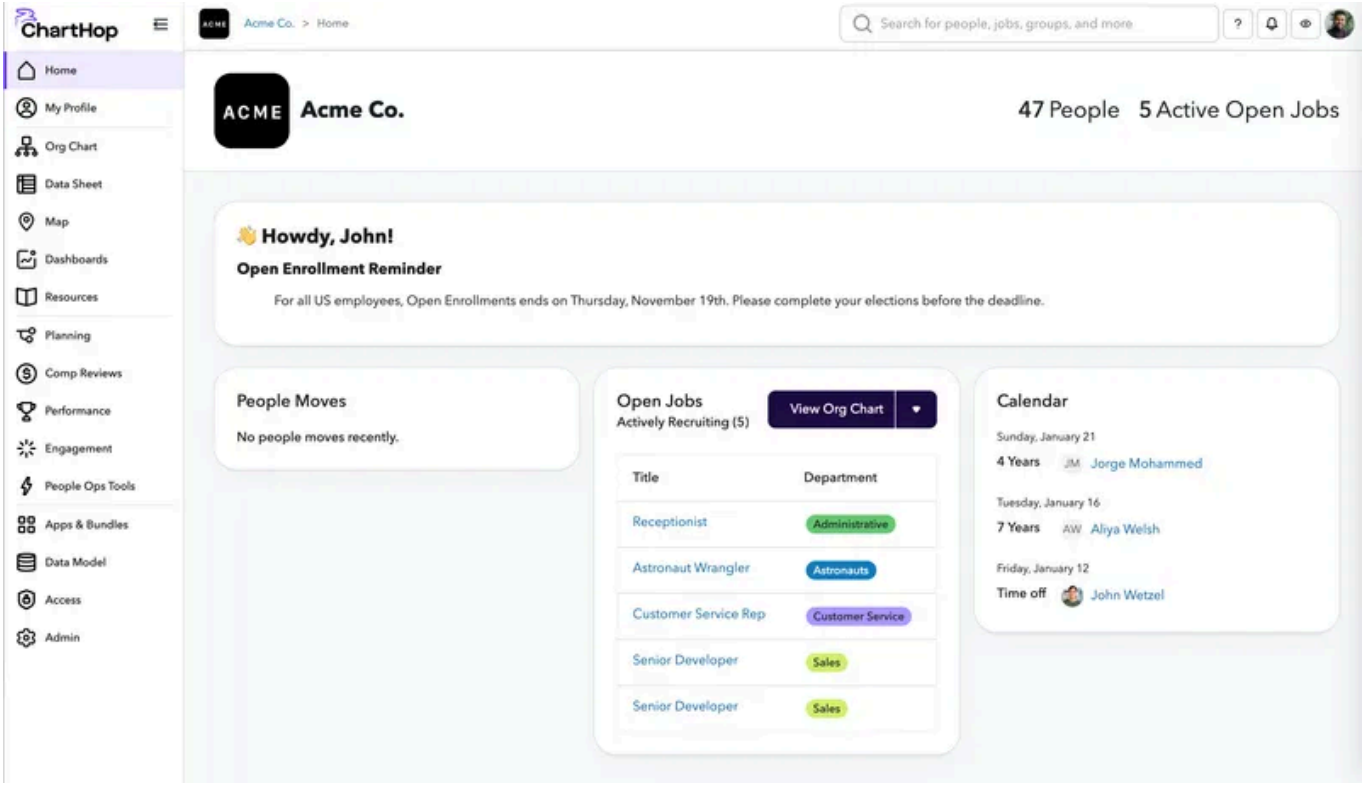
2.4. Home page

When you sign in to ChartHop, the **Home** page displays. What you see here is **configurable by your ChartHop administrator.**



The upper area on the ChartHop **Home** page contains the following sections:

- In the upper right corner, the total number of **People** and **Active Open Jobs** for your organization.
- If you have any **tasks**, such as forms to complete, the list of items appears here.
- The next section is a customizable message from your organization.



Org Summary on the Home page

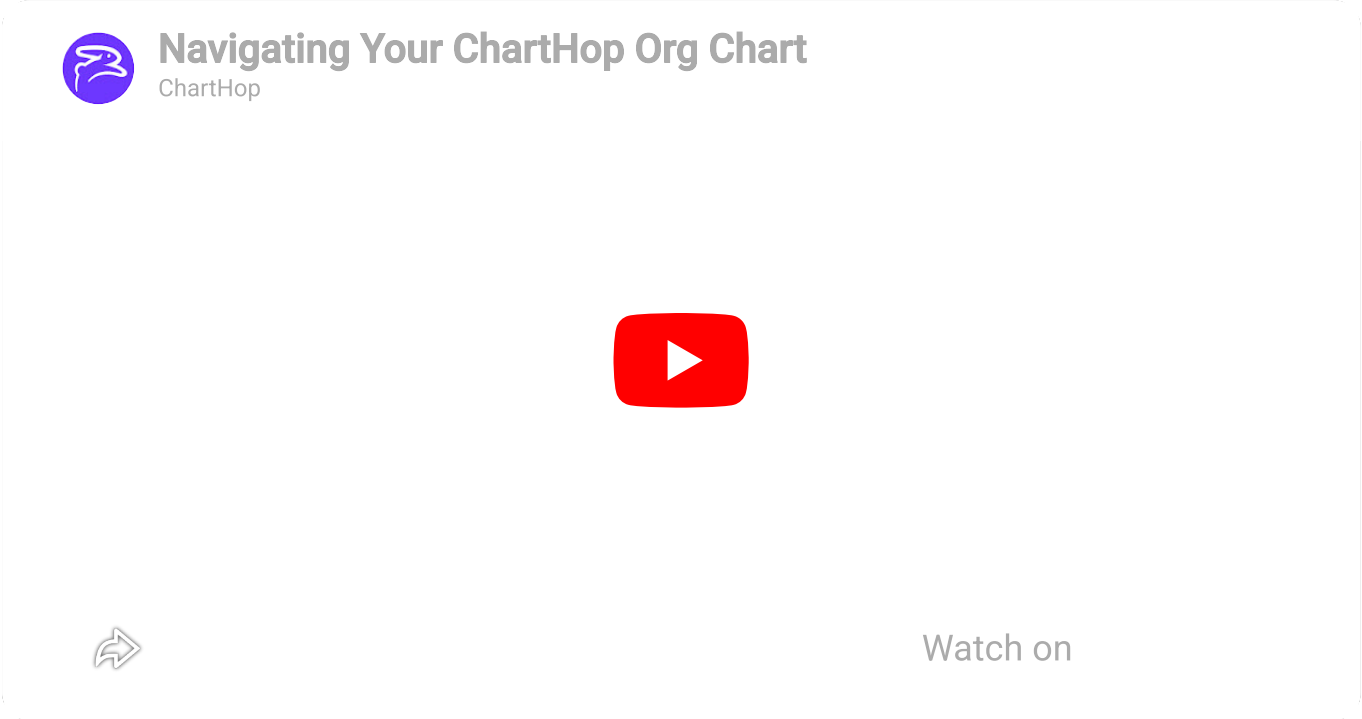
On the lower area of the **Home** page for all ChartHop packages, three panels show the following information:

- **People Moves** - Recent title changes, transfers, promotions, or departures.
- **Open Jobs** - Open positions in your org.
- **Anniversaries and Birthdays** - Current work anniversaries and birthdays.

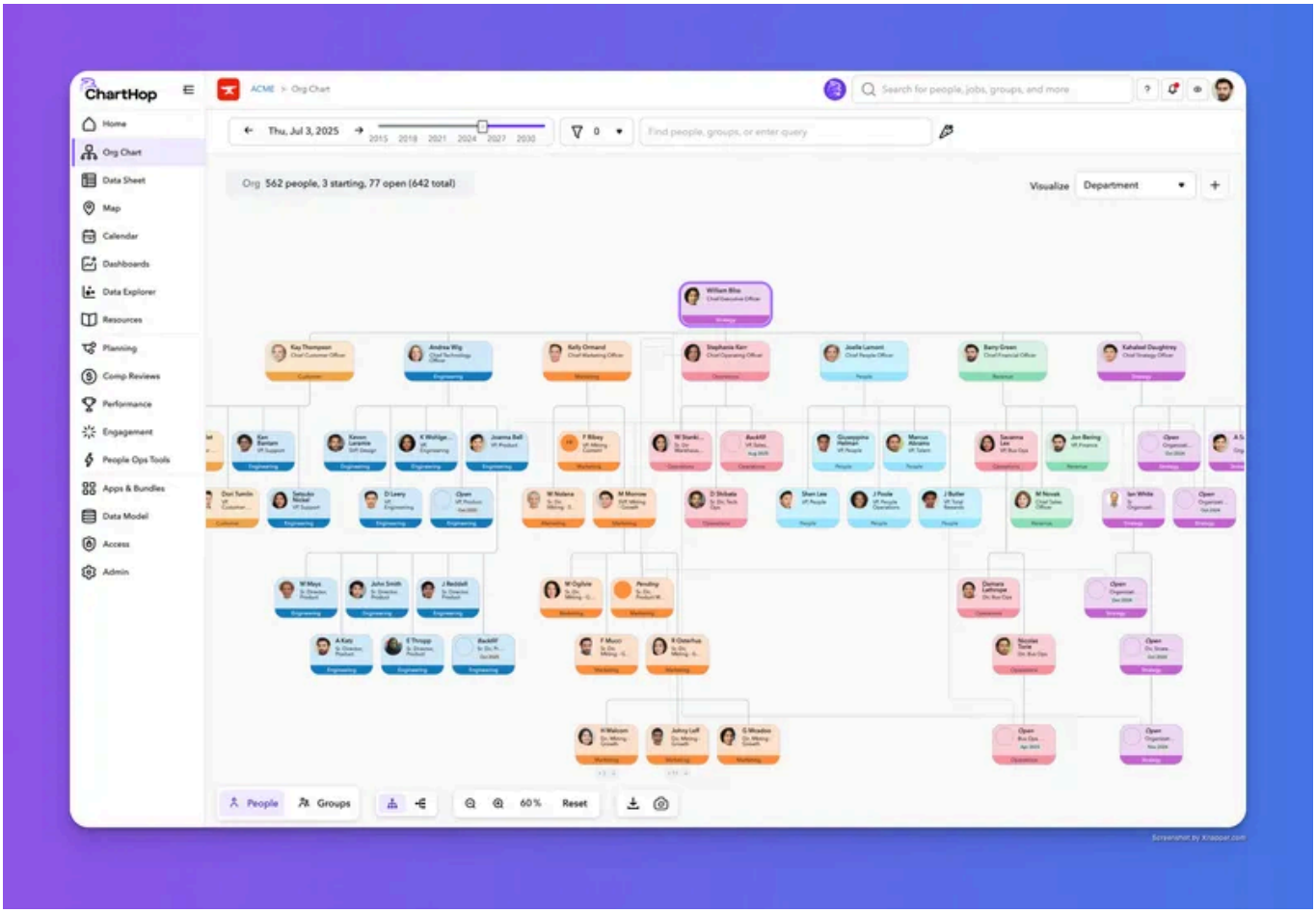
> People moves are Org public unless you set their announce date to the future. **Learn more**.
>
> Open job visibility is determined by ChartHop's roles and permissions. For example, you can set a job's Sensitivity to **Highly sensitive** so that only users with access to that level can view it. **Learn more**.

2.5. Org Chart

After you have uploaded your employee roster and historical data to ChartHop, you can use the **Org Chart** to navigate parts of your organization that include its departments, teams, and employee profiles.



The top left corner also displays the total number of people and open jobs in your org. Open jobs are included in the total regardless of their recruiting status.



Adjusting the view

From the lower left corner, you can zoom in and out or change the orientation of the **Org Chart**. You can also adjust the view with your mouse or trackpad.

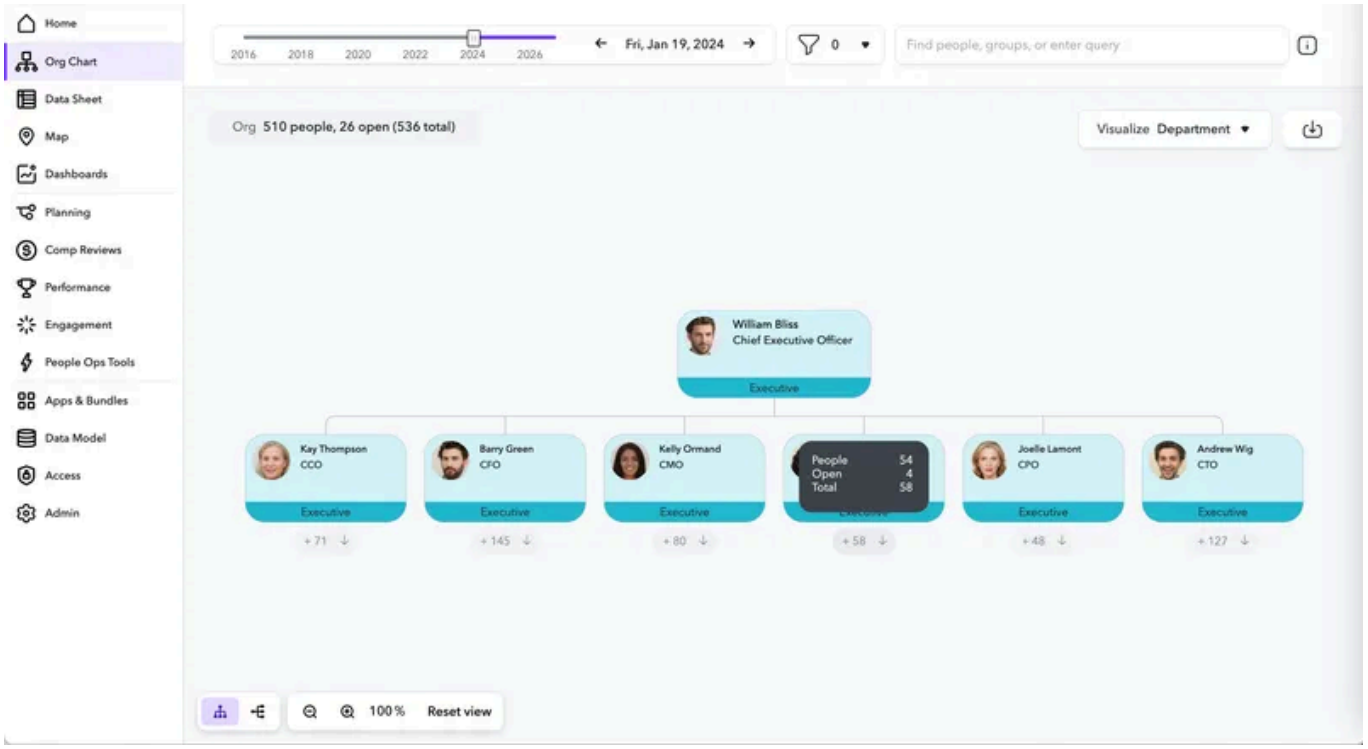
Control	Description
Orientation	Change the orientation from vertical to horizontal by selecting the corresponding icon.
Zoom	Select the **Plus** (**+**) or **Minus** (**-**) icons to zoom in or out. You can also enter a specific zoom percentage. When you zoom in on the Org Chart, people cards are dynamically shown or hidden based on where you are in the organization structure.
Reset view	Select **Reset view** to return to the default view.

> ChartHop intelligently abbreviates job titles in the Org Chart when you zoom in or resize your browser window. For example, "Senior Vice President" becomes "SVP".

Using the expansion arrows

Depending on the size of your org, you may not be able to fit all employees on the screen at once. When this happens, you can use the *expansion arrows* to navigate. Select an expansion arrow to view the department or team below an employee (for example, a reporting line under a manager).

Hover your cursor over an expansion arrow to preview the employees and jobs underneath it.



Searching the Org Chart

Use the search box in the upper right corner to search for jobs, people, or groups. To view an open role or a person's profile, enter the job title, and the results appear as you type. To locate a person, enter their name and click it to load their profile.

Viewing departments or employees

Select a manager to view only their team and its direct reports.

Double-click any card in the **Org Chart** to view the employee profile information for that employee. The data you see depends on your permissions.

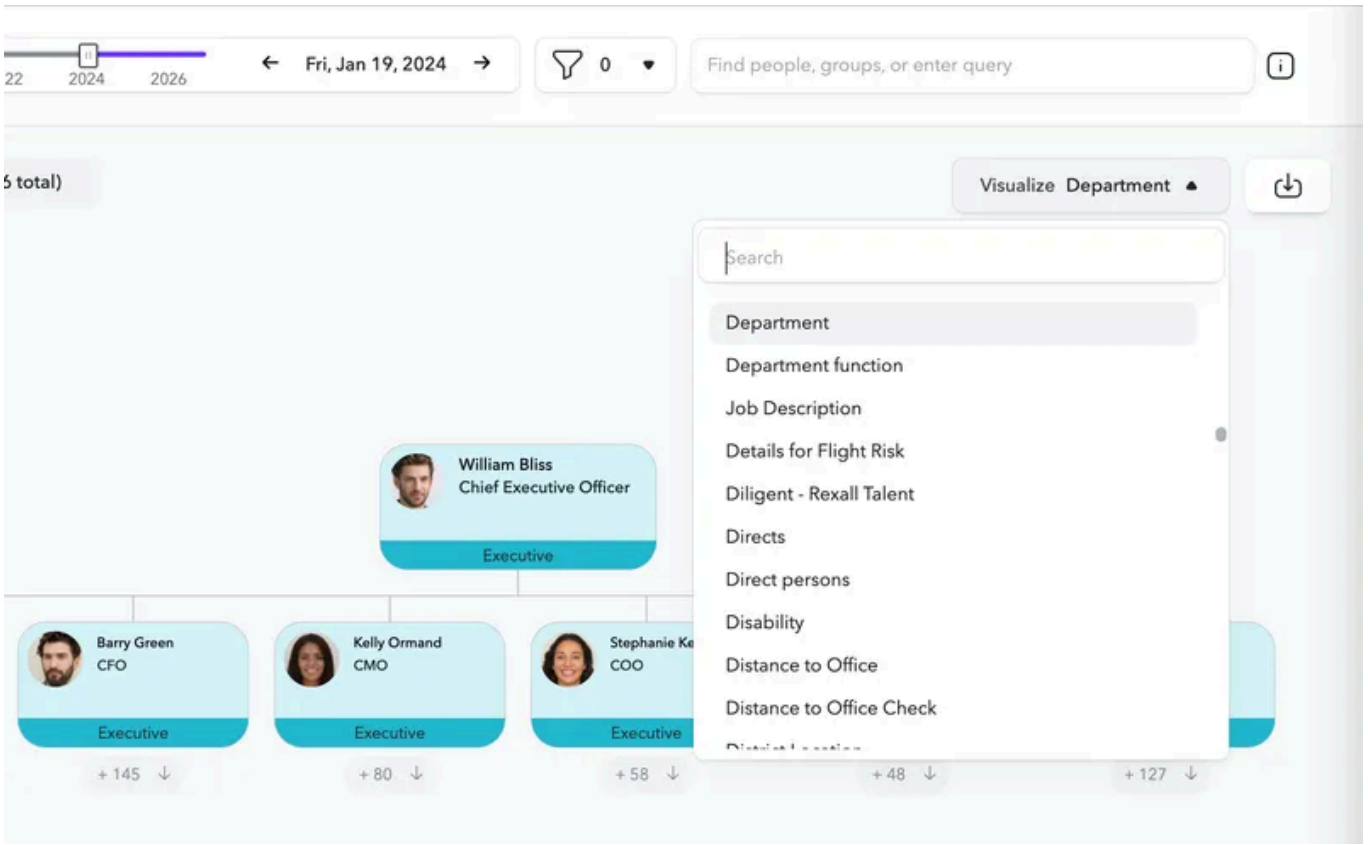
Viewing the Org Chart over time

You can use the date slider at the top of the page to view the **Org Chart** as it was in the past, or as it will appear in the future when new hires join your organization. Select the date and then select **Today** to return to today's date. Bookmark this view to save an always-current snapshot of your ChartHop org.

Using the Visualize menu

With the **Visualize** menu, you can highlight specific fields within your Org Chart.

Based on the attribute you choose, employee cards display color-coded labels. For example, if you select **Department**, each employee's department is displayed.



Using Screenshot Mode

You can Export the org chart by clicking the Download/Export button. If you'd rather take screenshots of the Org Chart, there is also a Screenshot Mode button. Clicking this will turn the background of the Org Chart white and remove any PTO information from the People cards.

2.5.1. Export your Org Chart to slides

ChartHop enables you to export your **Org Chart** to a Microsoft PowerPoint file and provides several options so that you can customize that export.

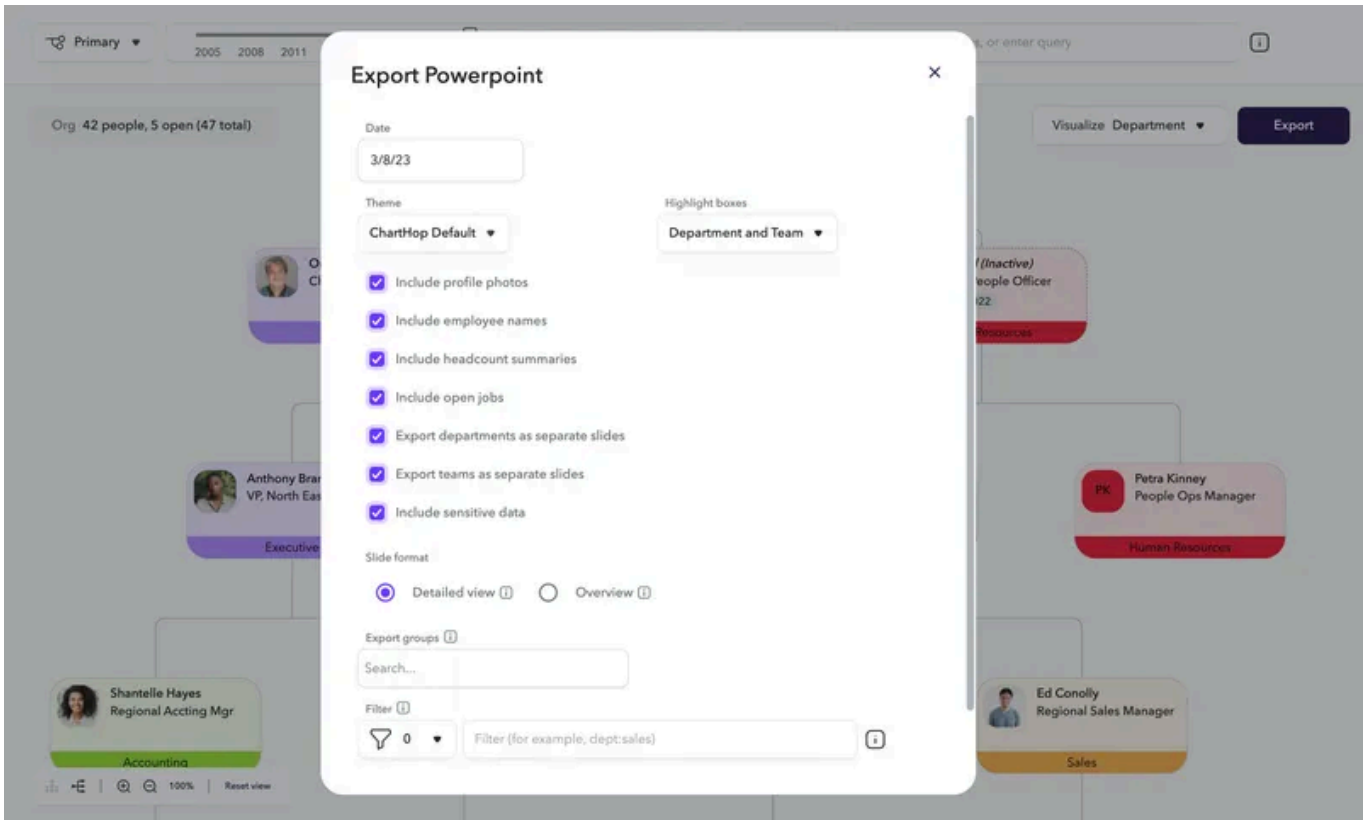
You can choose to include only specific departments, teams, or locations in the export. In addition, you have the ability to choose different aspects of your **Org Chart** to be highlighted in your export based on ChartHop fields (for example, comp band). You also have the option to export each team or department to separate slides. Custom filters give you even more flexibility about the information that is included in your export.

For example, you can export an **Org Chart** view of your organization that includes only the Finance and Marketing departments, highlights the comp band for each employee, and excludes open jobs.

> Org Chart exports only include data you can access. Depending on your user access role and the sensitivity of certain data, some jobs may not be included in your export. For example, open jobs marked as **Manager shared** or **Highly sensitive** may not be exported if you don't have access to that data. You can control whether sensitive data is included in the export. **Learn more.**

To export your Org Chart:

1. Select **Org Chart** from the left sidebar.
2. Select **Export Icon** in the upper right corner.
3. Use the options in the **Export Powerpoint** dialog to determine how your slides are structured and the data that is included.
    - Any dates, filters, and **Visualize** settings you've applied to the **Org Chart** are automatically reflected in the **Export Powerpoint** dialog. For example, if you've filtered the **Org Chart** to only show the Accounting department, the **Filter** field in the **Export Powerpoint** dialog will automatically have the `department="Accounting"` filter pre-populated.
    - See below for a description of all export settings.
4. Select **Export**. Depending on the size of your organization, the export may take some time.



Export settings

Below is a description of available export settings:

Export Setting	Description
Date	Set the date in your organization's history that you want to export. Defaults to current date.
Theme	Determines the theme that is used for the export. If your organization has a custom theme available, you can select it here. Defaults to **ChartHop Default**.
Highlight boxes	Determines what aspect of your organization is included on your employee cards. Defaults to **Departments and Teams**.
Include profile photos	Choose whether or not you want profile photos included in your export.
Include employee names	Include employee names in the export. When this option is not selected, only job titles display in employee cards.
Include headcount summaries	Include a headcount summary on each slide.
Include open jobs	Include open jobs in your exported slides.
Export departments as separate slides	Export each department to a separate slide. Larger departments may still be split into multiple slides for readability.
Export teams as separate slides	Export each team to a separate slide. Larger teams may still be split to multiple slides for readability.
Include sensitive data	Include sensitive data (for example, certain open jobs) in the export. This option is selected by default when the sensitive data eye icon is toggled to visible. When sensitive data is toggled to hidden, you must select this option to include sensitive data in the export. **Learn more.**

Export Setting	Description
Slide format	Select how your **Org Chart** displays on your slides: • **Detailed view** - Exports large teams and departments using separate slides to ensure legibility. This slide format displays up to 10 employees per slide. • **Overview** - Exports large teams and departments on the same slide. This slide format displays up to 40 employees per slide.
Export groups	Select specific groups (departments, teams, locations) to include in your export.
Filter	Enter a custom filter to more specifically determine the employees and jobs that are exported.

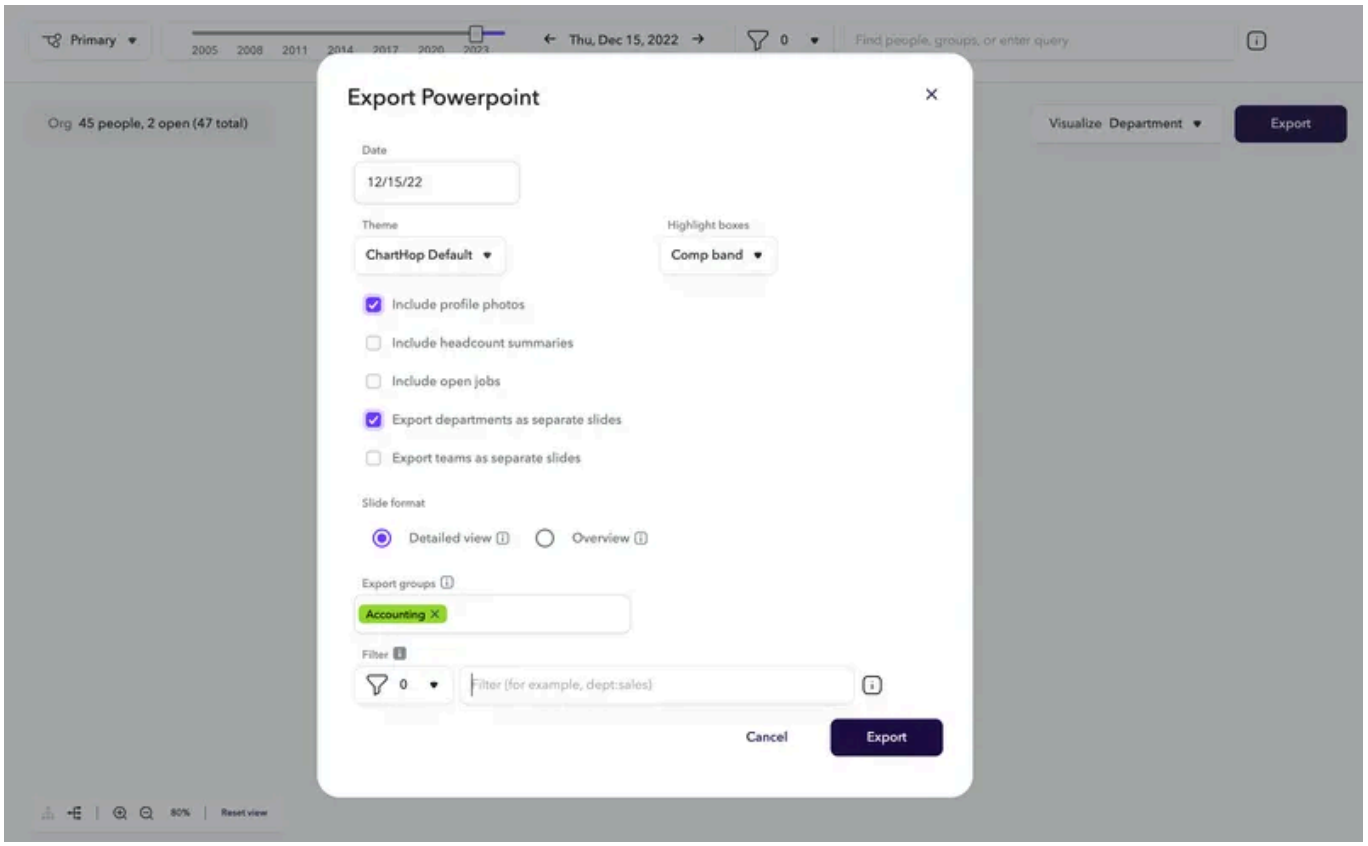
Export a specific department to a single slide

To export a specific department (for example, Accounting) on to a single slide, you can configure the following settings:

- In the **Export groups** field, enter the `Accounting` department.
- Uncheck the **Export teams as separate slides** setting.
- Select the **Overview** slide format when you have more than 10 employees in the department.

To display a specific piece of data (for example, comp band) as highlighted in the employee nodes:

- In the **Highlight boxes** field, enter and select `Comp band`.



Once you have these settings configured, select **Export**. Your export should look like the example below.

All employees in the Accounting department are on the same slide and any employees who are not part of that group display are not highlighted. Each node highlights the specific comp band for that employee.



Export your entire org chart to a single slide

To export your entire **Org Chart** to a single slide, you can configure the following settings:

- Uncheck the **Export departments as separate slides** setting.
- Uncheck the **Export teams as separate slides** setting.
- Select the **Overview** slide format.

> Depending on the size of your **Org Chart**, all employee nodes may not display legibly. For larger organizations, exporting to a single slide may not be possible and multiple slides must be used instead.

Export your org chart without employee names

You can export your **Org Chart** so that it displays without any employee names. This is helpful for presenting the structure of your organization in slides while maintaining employee privacy.

To export your Org Chart without employee names:

1. Select **Org Chart** from the left sidebar.
2. Select **Export** in the upper right corner.
3. In the **Export Powerpoint** dialog, uncheck the **Include employee names** option.
    - Unchecking the **Include profile photos** option is also recommended to remove all personal identifiers.
4. Select **Export**.

Depending on the size of your organization, the export may take some time. Nodes display in the exported **Org Chart** without any employee names.

Export your org chart without sensitive data

You can export your **Org Chart** so that it displays without any sensitive data (for example, open jobs marked as **Manager shared** or **Highly sensitive**).

To export your Org Chart without sensitive data:

1. Select **Org Chart** from the left sidebar.

2. Select **Export** in the upper right corner.
3. In the **Export Powerpoint** dialog, uncheck the **Include sensitive data** option.
    - This option is selected by default when the sensitive data eye icon is toggled to visible. **Learn more.**
    - When the sensitive data eye icon is toggled to hidden, this option is automatically unselected.
4. Select **Export**.

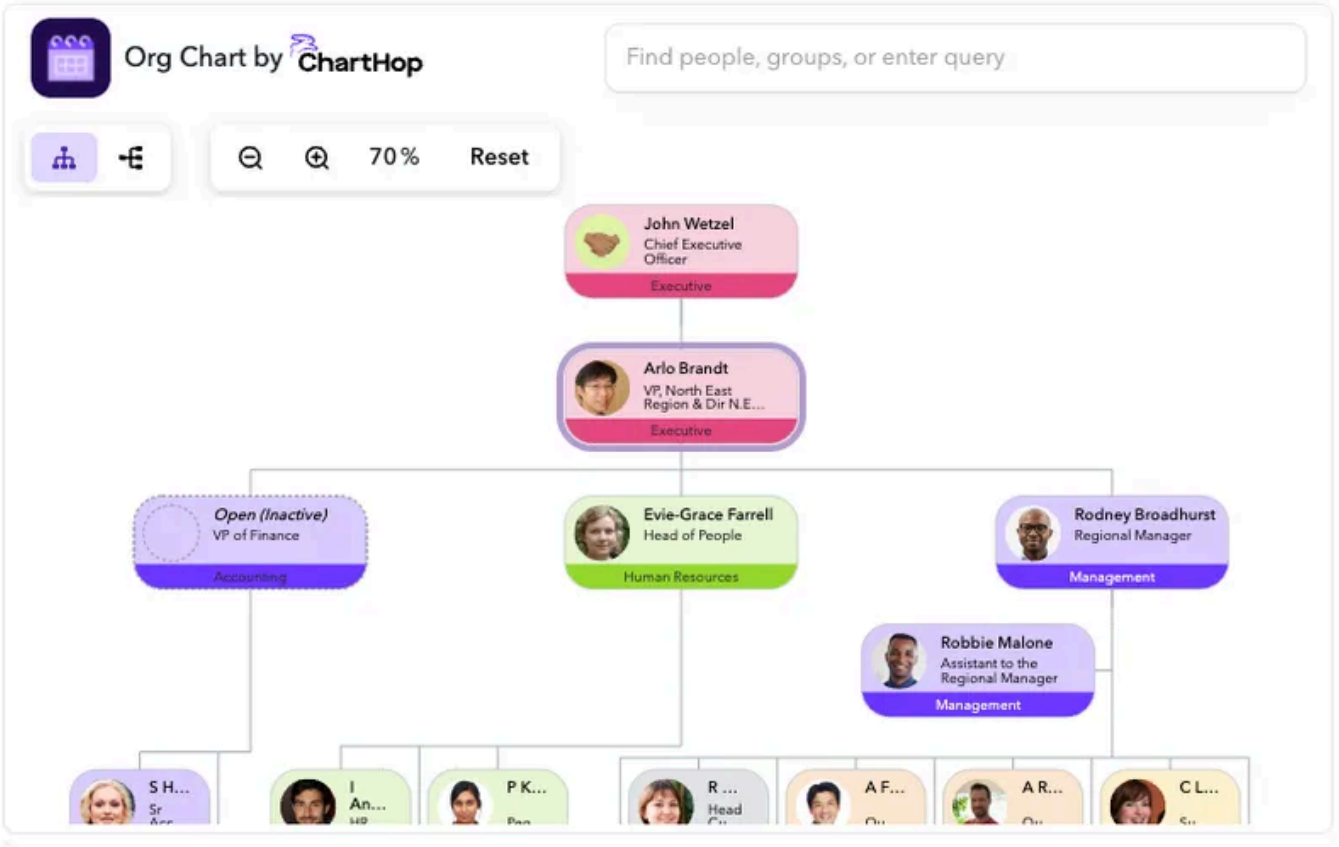
Depending on the size of your organization, the export may take some time. The **Org Chart** is exported without any data marked as **Manager shared** or **Highly sensitive**.

2.5.2. Embed your Org Chart on a webpage

You can use the **Embeddable Org Chart** app to create a public, searchable version of your ChartHop org chart that you embed on any webpage that supports inline frames. For example, you can add your org chart to your company intranet.

Users don't need a ChartHop account to view and interact with an embedded org chart.

> The embeddable org chart displays all people, jobs, and groups in your org, but it doesn’t contain a change history, personal contact information, or any sensitive data.



Embedded Org Chat Example

Embedded Org Chart Setup

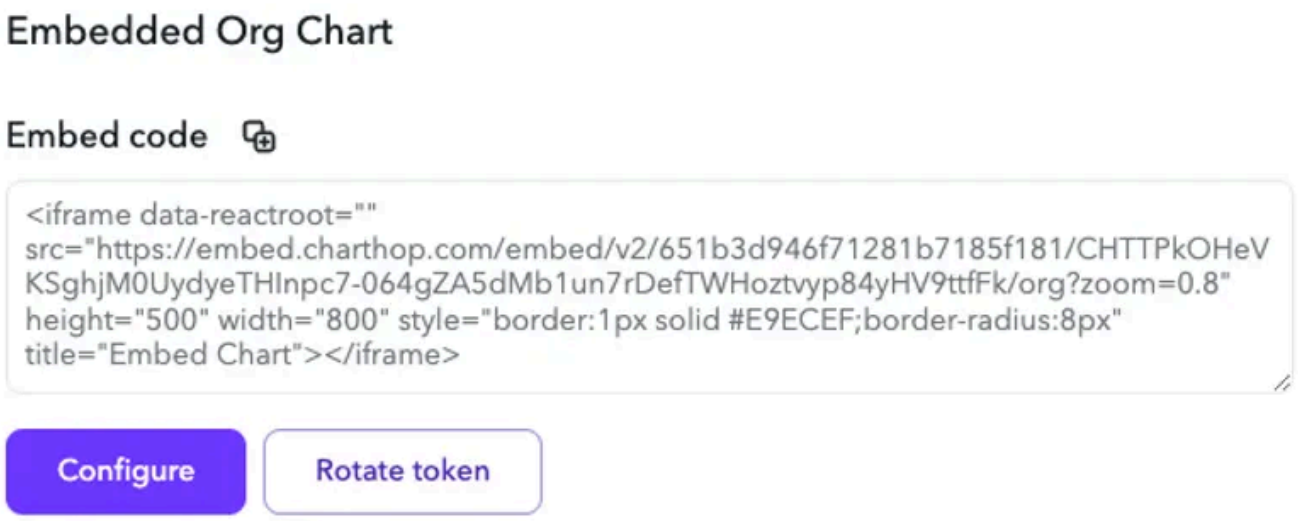
This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact ChartHop support or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

To use the embedded org chart:

1. Toggle the feature on withing **Admin > Labs**.
2. Select **Admin** from the left sidebar.
3. On the **Admin** menu, select the **Core Views** page.
4. Navigate to the **Embedded Org Chart** header.
5. Press the **Activate** button to generate an embed code
6. Select **Configure** to setup and preview
7. Use the **Copy** button to copy the embed code and add it to your website.
8. If you have any issues, press "Rotate token" to refresh the embed code.



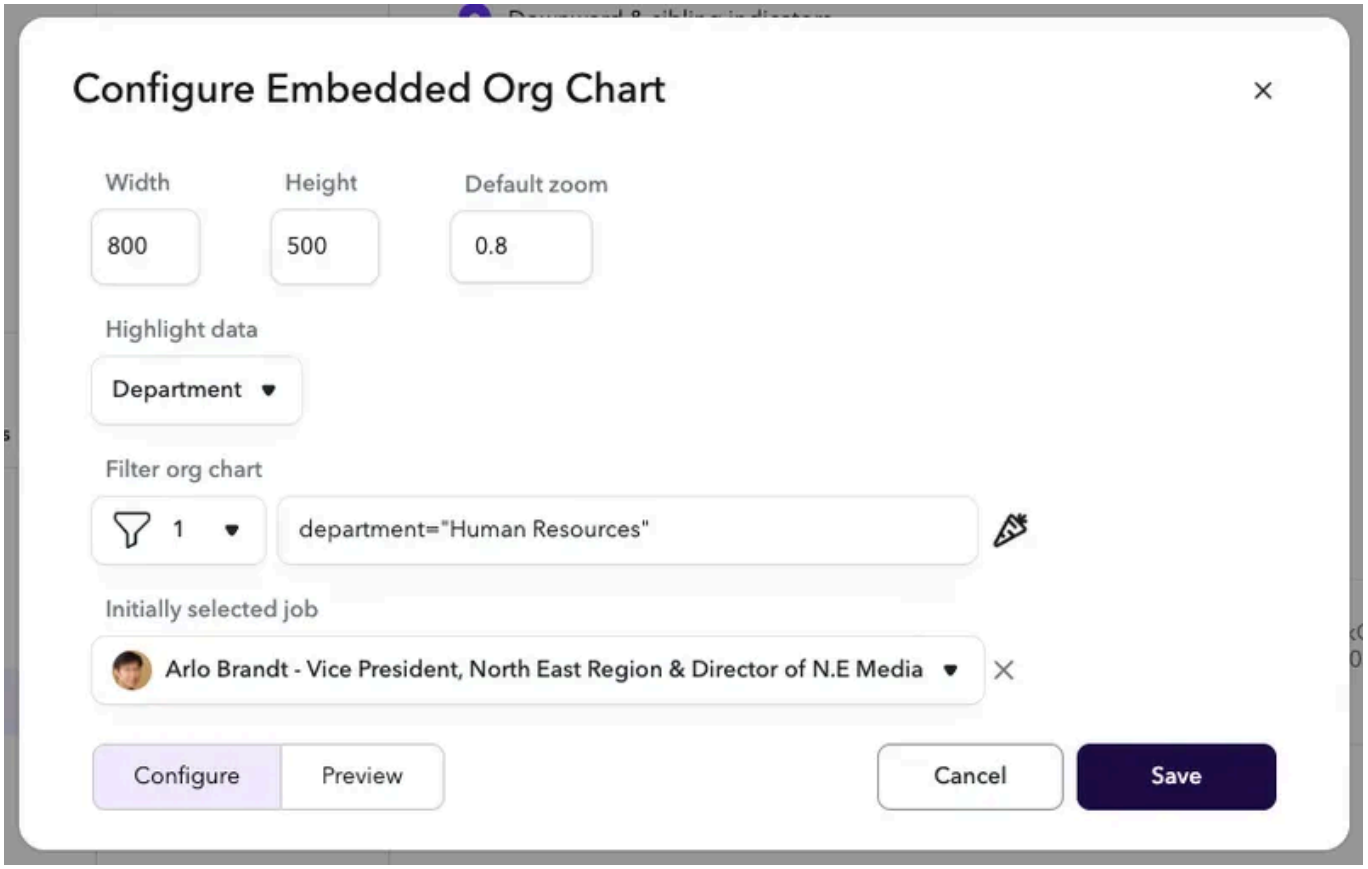
Configuring the Embedded Org Chart

To configure the embedded org chart, click the **Configure** button.

You can configure the:

- Size of the embed: **Width** and **Height** in pixels
- Default **zoom** level
- What data to **highlight**
- A default **filter** — Useful if you want to start with a highlight of one department or a subgroup of people.
- A person or job to focus the org chart on initially. (Optional)

Press **Preview** to see how the configuration would look.



Legacy Org Chart

Install the Embeddable Org Chart

Before you can embed your org chart on a webpage, you need to install the **Embeddable Org Chart** app from ChartHop to generate your embeddable org chart.

To install the **Embeddable Org Chart** app:

1. Select **Apps & Bundles** from the left sidebar.
2. On the **Apps** page, select the **Availible apps** tab.
3. Navigate to the **Embeddable Org Chart** app in the list.

4. Select **Install**.
5. On the **App details** page, select **Install**.
6. Select **Install App** to configure the app (see below).

Configure your Embeddable Org Chart

You can configure the settings of your embeddable org chart to determine how and what information it displays when it is embedded. For example, you can determine the display size as well as specific information (such as department or team) to highlight within the embeddable org chart.

Once you're done configuring, you can then paste the generated HTML onto your webpage to embed it.

To configure your embeddable org chart:

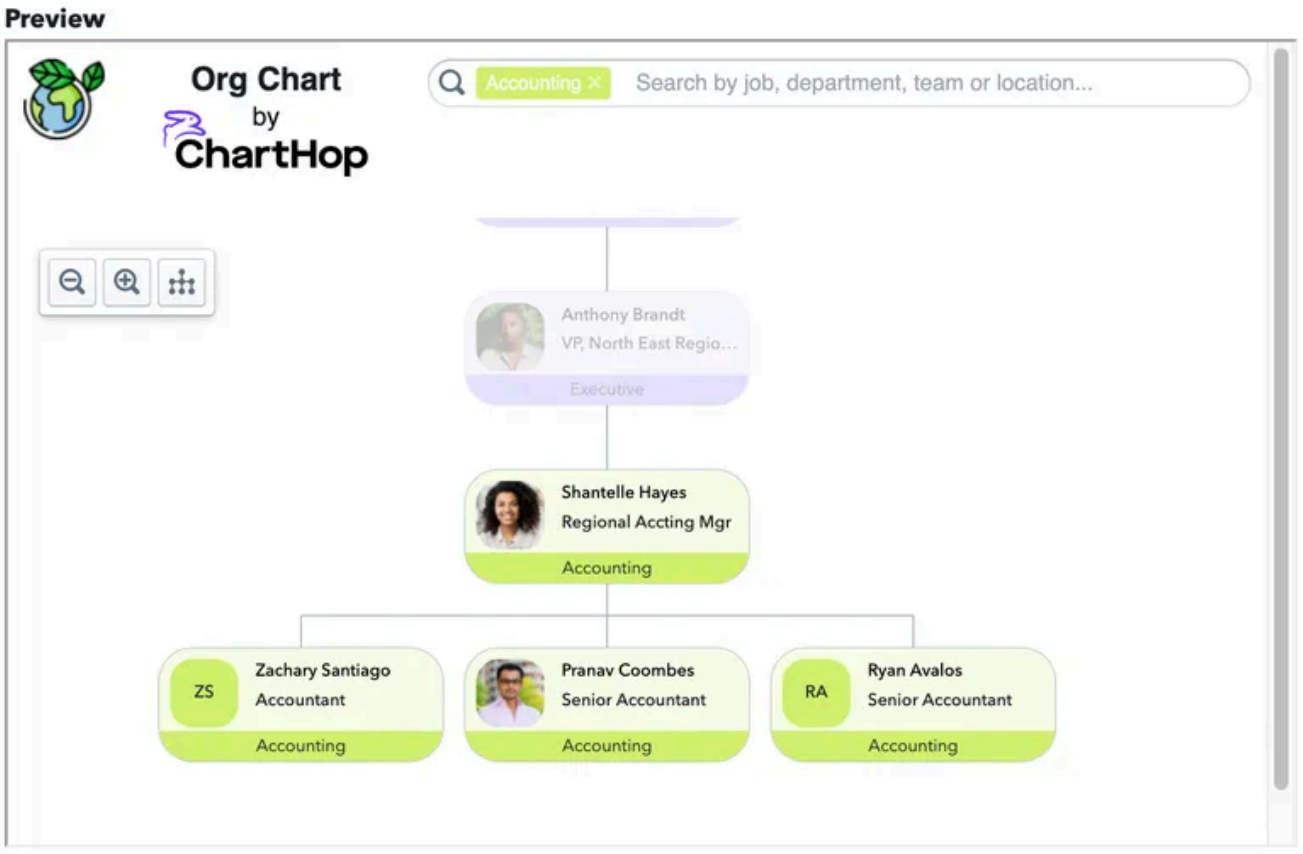
1. Select **Apps & Bundles** from the left sidebar.
2. On the **Apps** page, navigate to the **Embeddable Org Chart** app in the **Installed apps** tab.
3. Select **Configure** (gear icon).
4. Configure the following settings:
    - **Width** - Width of the embeddable org chart (in pixels). Defaults to 800 pixels.
    - **Height** - Height of the embeddable org chart (in pixels). Defaults to 500 pixels.
    - **Zoom** - The default zoom level of the embeddable org chart. Defaults to 0.8.
    - **Highlight Data** - Whether to display your ChartHop organization by **Department** or **Team**.
    - **Filter** - Enter a custom filter to further specify the groups of people that display in the embeddable org chart. **Learn more.**
5. Copy the generated HTML in the **HTML Source** box.
6. Paste the HTML onto your webpage to finish embedding your org chart.

Use the Embeddable Org Chart

The embeddable org chart is a public-facing version of your ChartHop **Org Chart** with much of the same functionality.

You have the ability to search by person, job, department, team, or location. You can also zoom, change the orientation of the org chart, and click and expand on different employee nodes to explore and move throughout your organization.

Depending on how the embeddable org chart is configured, each employee node will highlight either the employee's department or team.



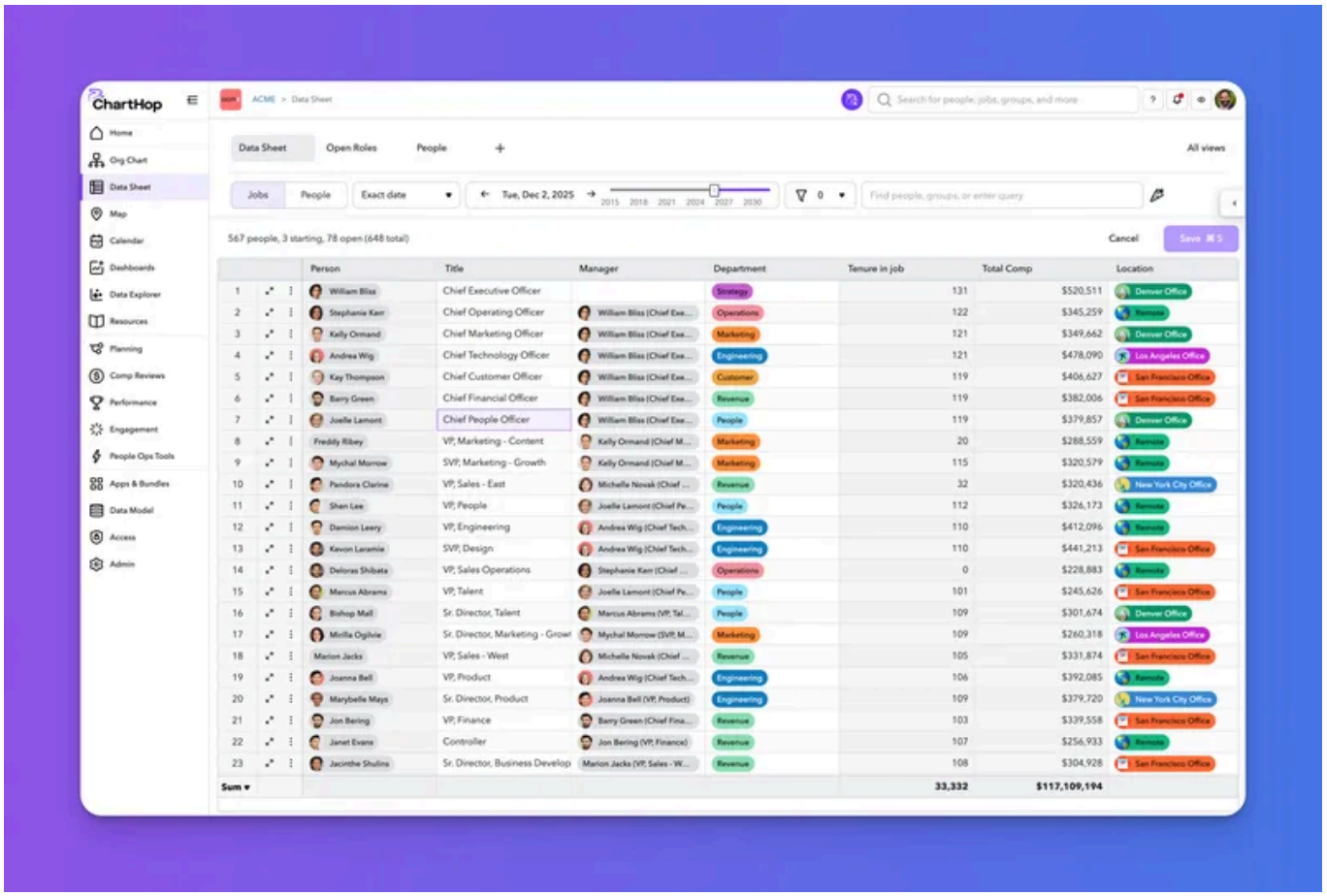
Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Owner | Technical owner

2.6. Data Sheet

The **Data Sheet** provides a list view of your organization, which is helpful when you need to customize how you see your organization's data or edit the data for multiple employees at once.

You can use the **Data Sheet** as a source of truth for all the job and people data within your organization. This page gives you the ability to create a customized view of your data for all of your planning needs. You can control what data displays on the page by customizing the columns you need and sorting by a particular column. You can also use filters to refine which employees and jobs are included in the list.



Navigating the Data Sheet

When you start viewing the data sheet you are in the unsaved **"Data Sheet"** view. As you [Add Columns](#) , [Data Sheet](#), [Data Sheet](#), you will create the exact view of the data that you need. You

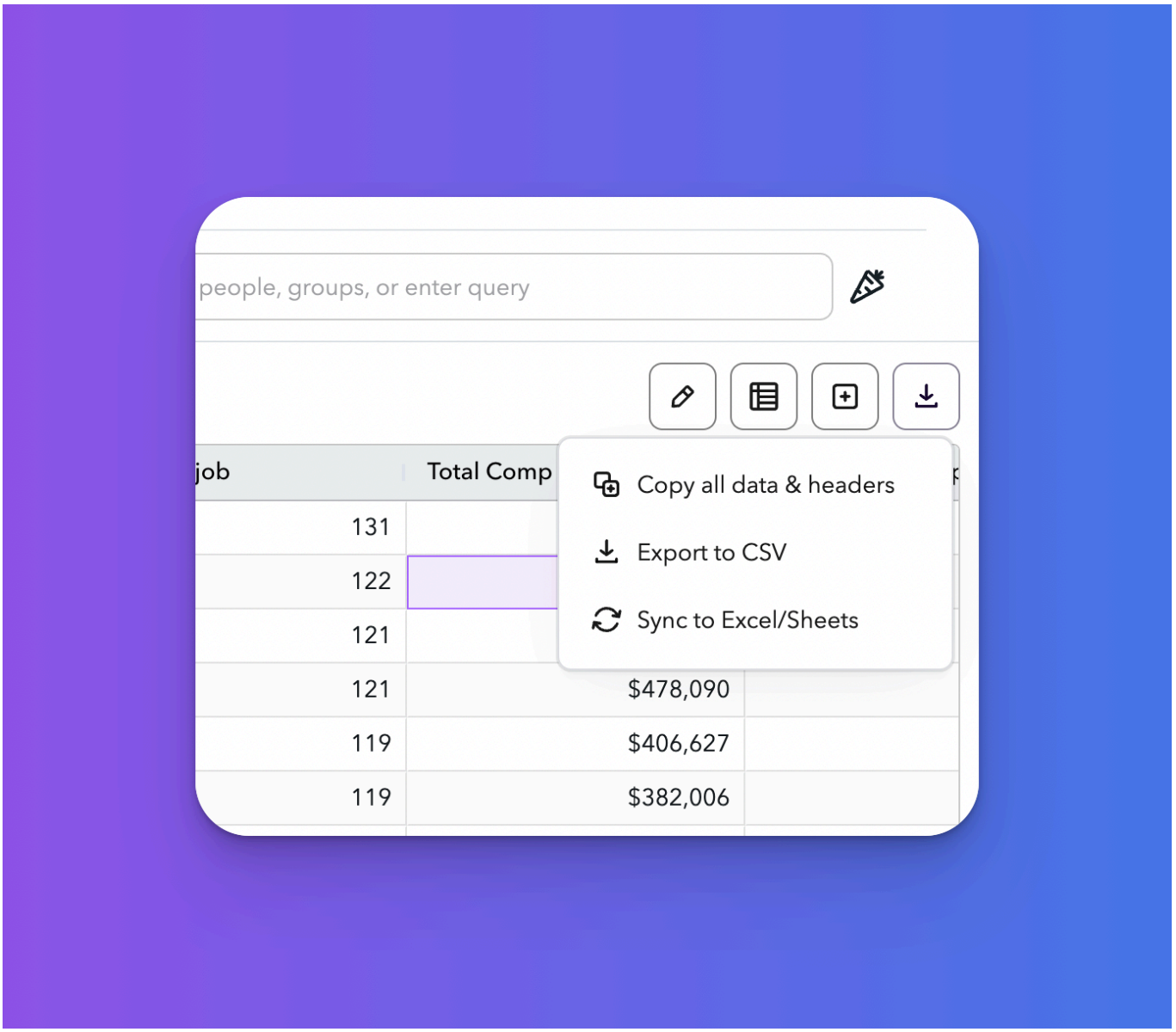
Data is protected at the field (column) level by the **Controlling sensitive data** assigned to the field, the viewer's positition in the organization and by their specific **Key Concepts: Role-based Access**.

Most data in ChartHop time tracked. So you will see a **time selection and slider** at the top of the data sheet. This will show you what date you are viewing the data as of.

Actions

Above the Data Sheet on the right side, you will see a row of icons. These options are:

1. **Restore / Reset** (Circular arrow icon)
2. Edit Mode (Pencil Icon) - *Only shown if you can edit data.*
3. Select & Manage Columns (Column Icon)
4. Add Open Job (Plus Icon) - *Only shown if you have access to do this.*
5. Export and Sync (Download Icon)
    1. Copy all data & headers
    2. Export to CSV
    3. Sync to Excel/Sheets



Filtering data

Refine what Jobs or people are displayed by applying a **filter** to the data.

More information about filtering can be found in **Filtering data**.

Columns

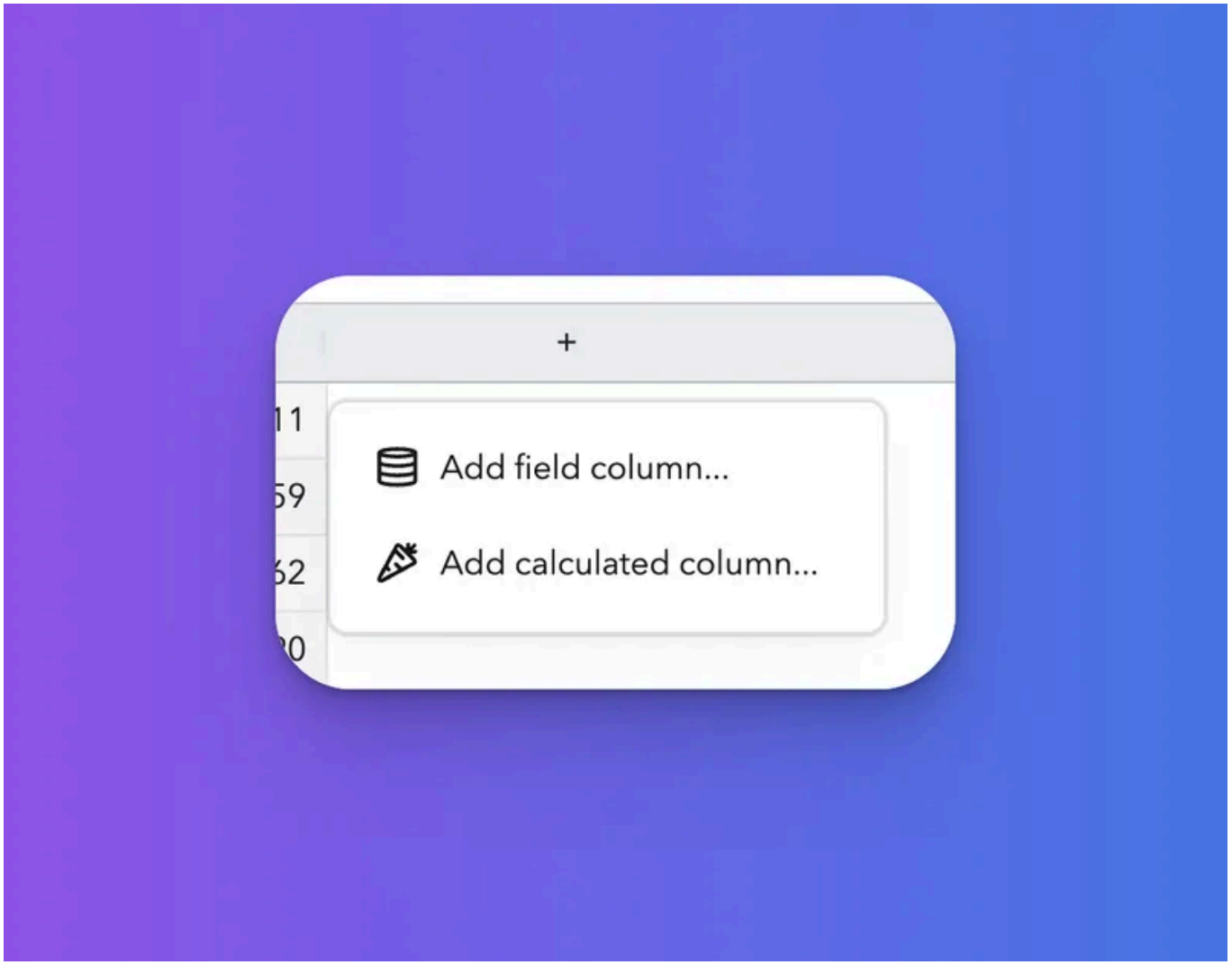
Adding & Removing Columns

You can quickly add a new column by clicking the + in the last column header or any column header.

Click the column header to and click "Hide column" to remove it from the data sheet view.

You can also use the **Select Columns** button located above the data sheet and dialog to add, remove and reorder columns as well.

To retain the columns that you added to to the data sheet, **Data Sheet** - give it a name and share it with others.

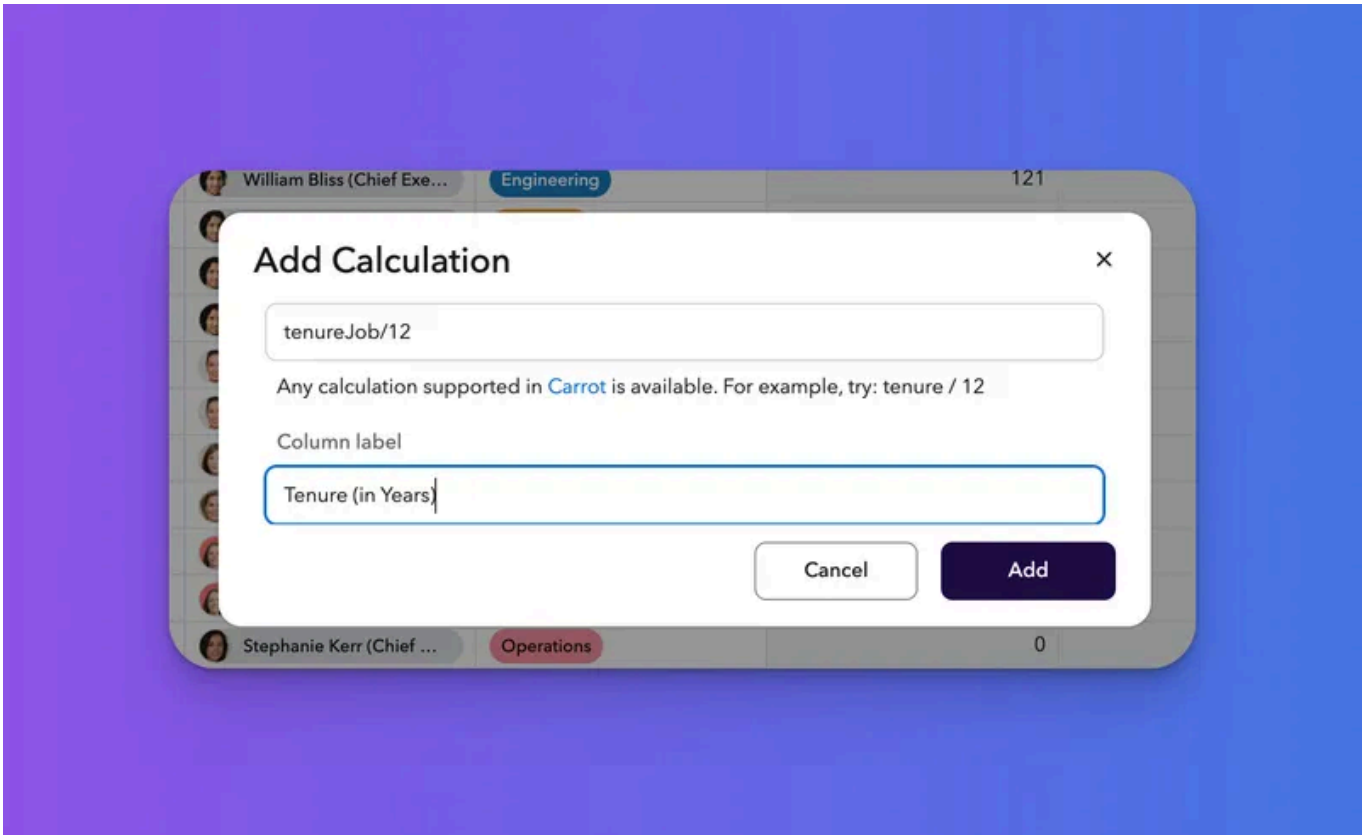


Calculated columns

Calculated columns are like a Formula in a spreadsheet that is applied to the whole column. You can add any calculation to your sheet by:

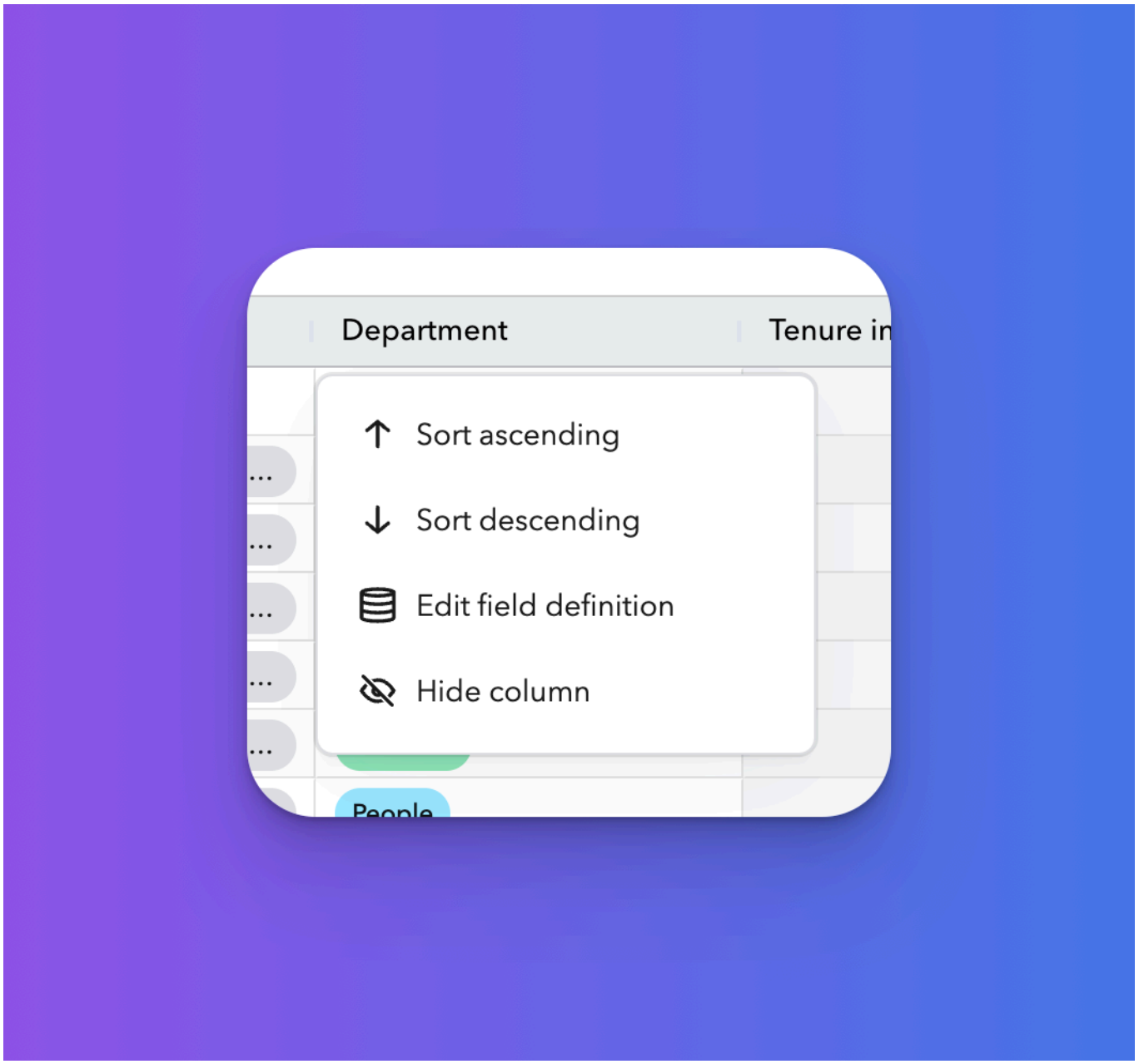
1. Click the "+" Column
2. Click Add calcualted column
3. Add the formula and a column label.

This column can be saved as a **Field data types & smart fields** field or can just exist within the context of the sheet.



Sorting Columns

Click the column header then select "Sort ascending" or "Sort descending" to sort a column.

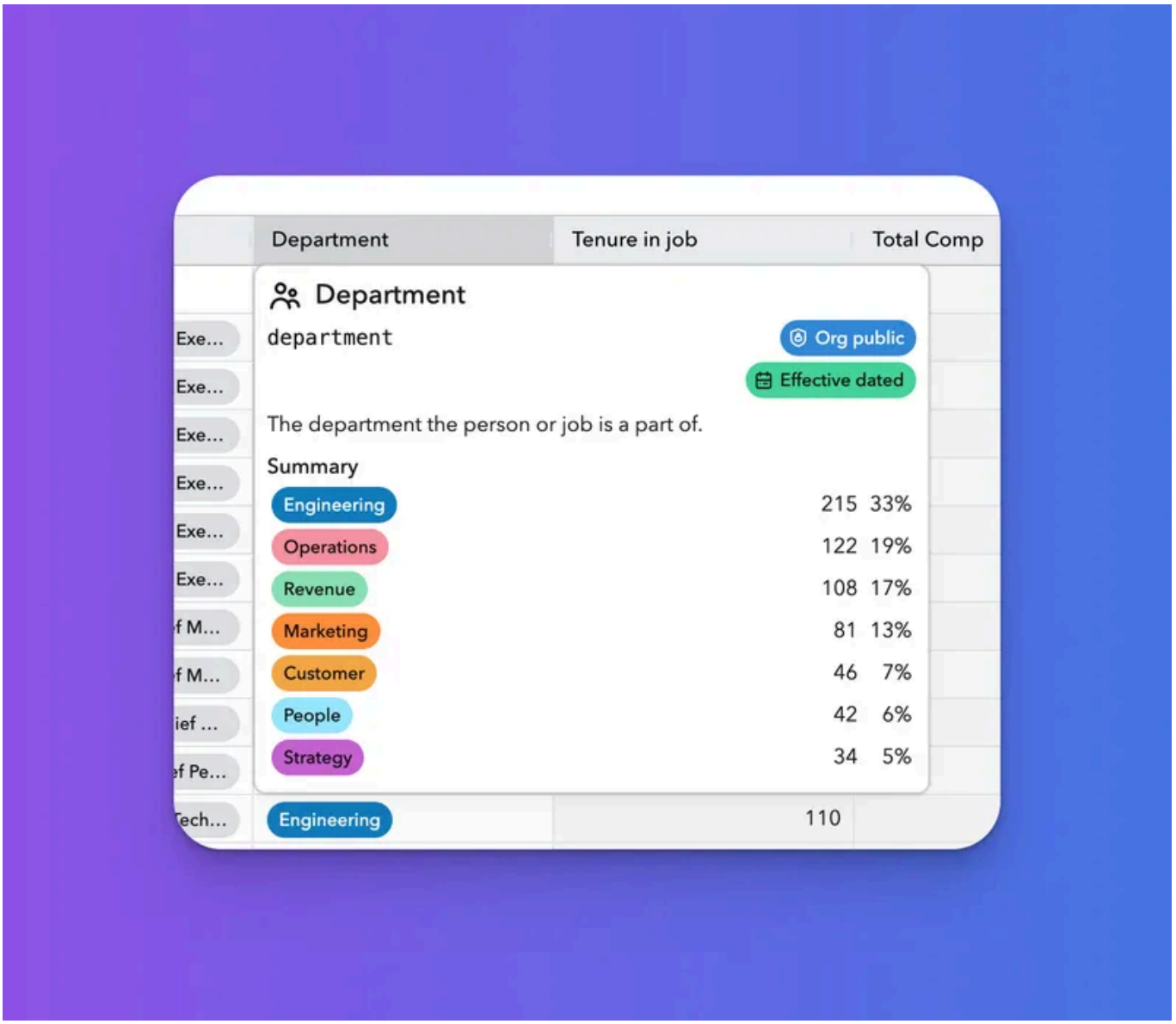


Sorting Columns

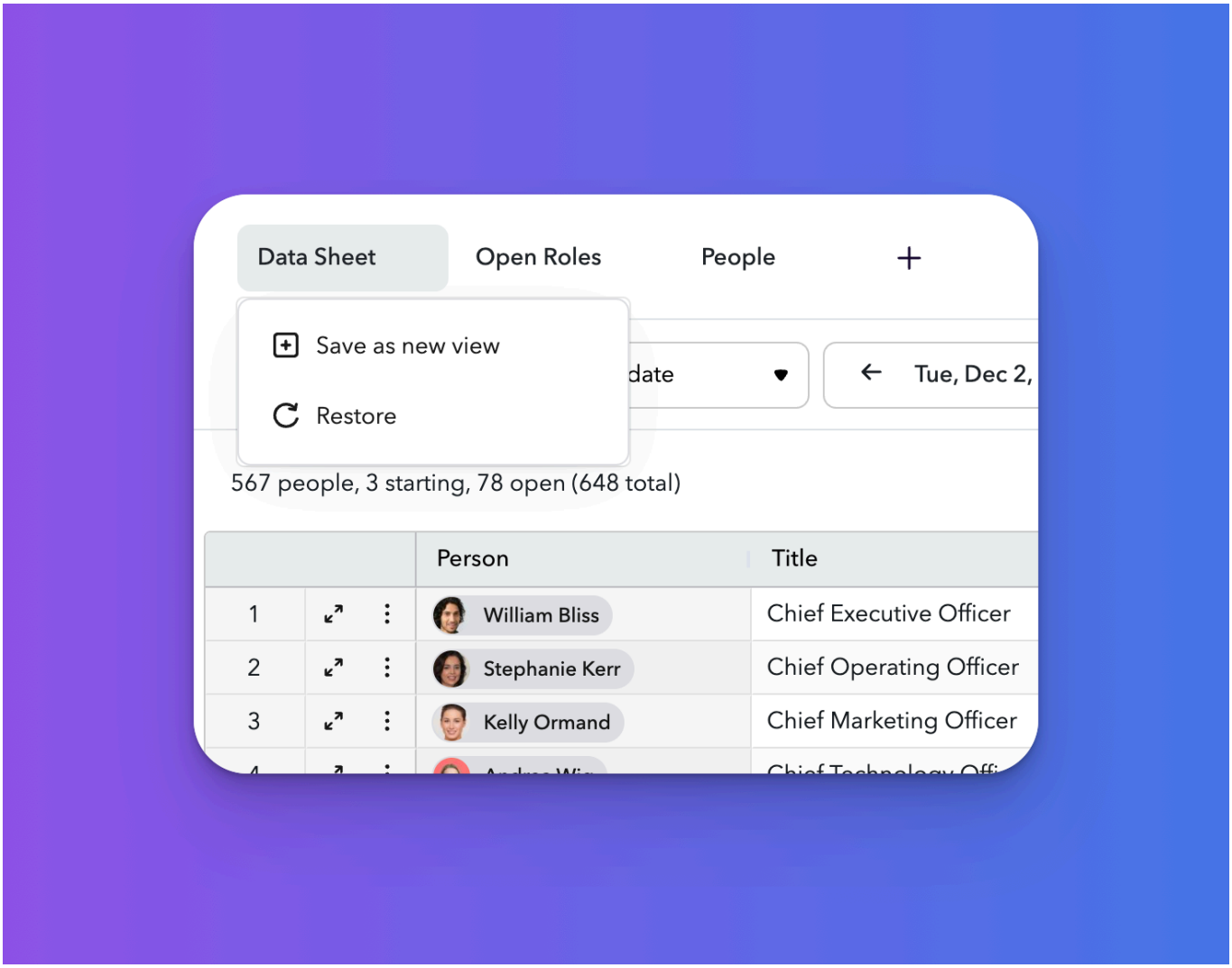
Column Details

Hover over a header to view information about the field in the colum including:

- Type (icon)
- Name
- Field code
- Sensitivity
- Description
- Summary with a breakdown of percentages for certain types of fields.


Department
Tenure in job
Total Comp
Department
department
Org public
Effective dated
The department the person or job is a part of.
Summary
Engineering 215 33%
Operations 122 19%
Revenue 108 17%
Marketing 81 13%
Customer 46 7%
People 42 6%
Strategy 34 5%
Engineering 110

Data Views



Save and Restore

Saving a Data Sheet View

To save a Data Sheet view (Columns, filters and time selection):

1. Rollover the "**Data Sheet**" tab at the top of the Data Sheet
2. Select **Save as new view**
3. Give the view a **name**
4. **Share** the view with others.

Using Relative Dates in Saved Views

When you save a Data Sheet view, the **filter is saved as written** — not as a snapshot of the evaluated date. This means filters that use relative date expressions will stay dynamic and automatically recalculate each time the view is opened.

For example, to create a saved view that always shows people who started in the last 30 days:

```
startDateOrg >= date('-30d') and is:person
```

Or to find people approaching a 90-day milestone (started between 85 and 95 days ago):

```
startDateOrg >= date('-95d') and startDateOrg <= date('-85d') and is:person
```

Because the filter stores `date('-30d')` rather than a hardcoded date like `2026-04-15`, each time someone opens the saved view, the date range is recalculated from the current date.

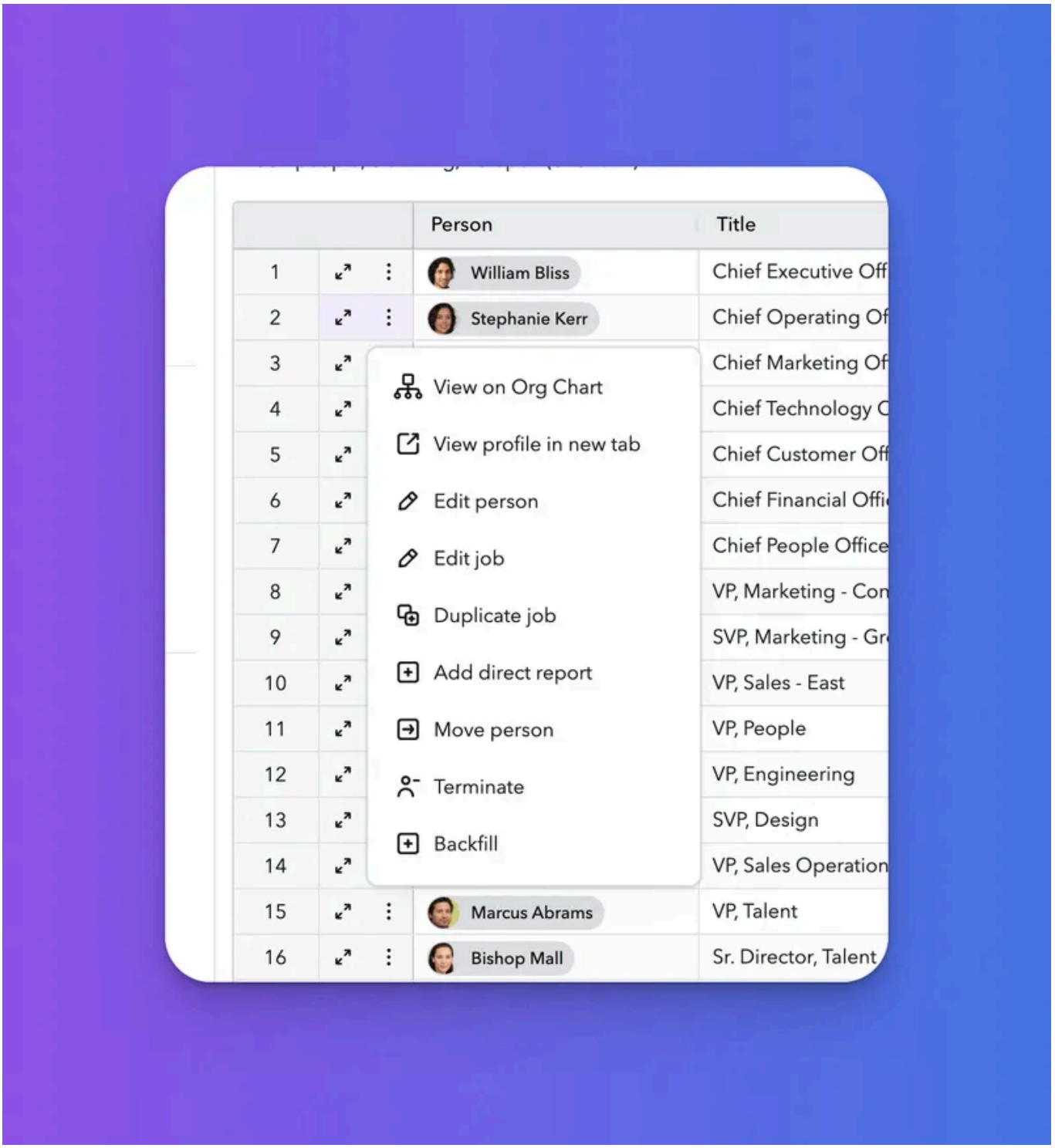
The date slider is also saved. If you want the view to always reflect today's data (not a historical snapshot), set the date slider to **Today** before saving the view.

Restore the Data Sheet

The home "Data sheet" can be reset to clear all columns, filters, and dates back to the default. Normally they are retained from session to session across time.

Taking action on a Person or Job

There are various ways to edit data on the data sheet. You can use the **Action Menu**, copy & paste within the data sheet, copy & paste from a spreadsheet, bulk edit



Action Menu

To access the actions like Edit job, Edit person or Terminate, you can either:

1. Click on the **action button** (button with three dots)
2. **Right click** on the row
3. Click on the **expand** button (button with diagnal opposing arrows) and select actions from the buttons on the side panel

The **Editing employee profiles** or **Edit jobs** will allow you to pull up a dialog for you to edit from.

Edit a cell

To edit a cell in the Data Sheet, either:

1. **Double Click** on a Cell you wish to Edit
2. Click the **Edit** Button (Pencil Icon) in the top right

Once you are done making Edits, Click **Save** and Review Changes.



Copy + Paste

Copy & Paste within ChartHop — Select then copy any cell or cells, paste it onto other data that you have access to edit and the changes will be staged.

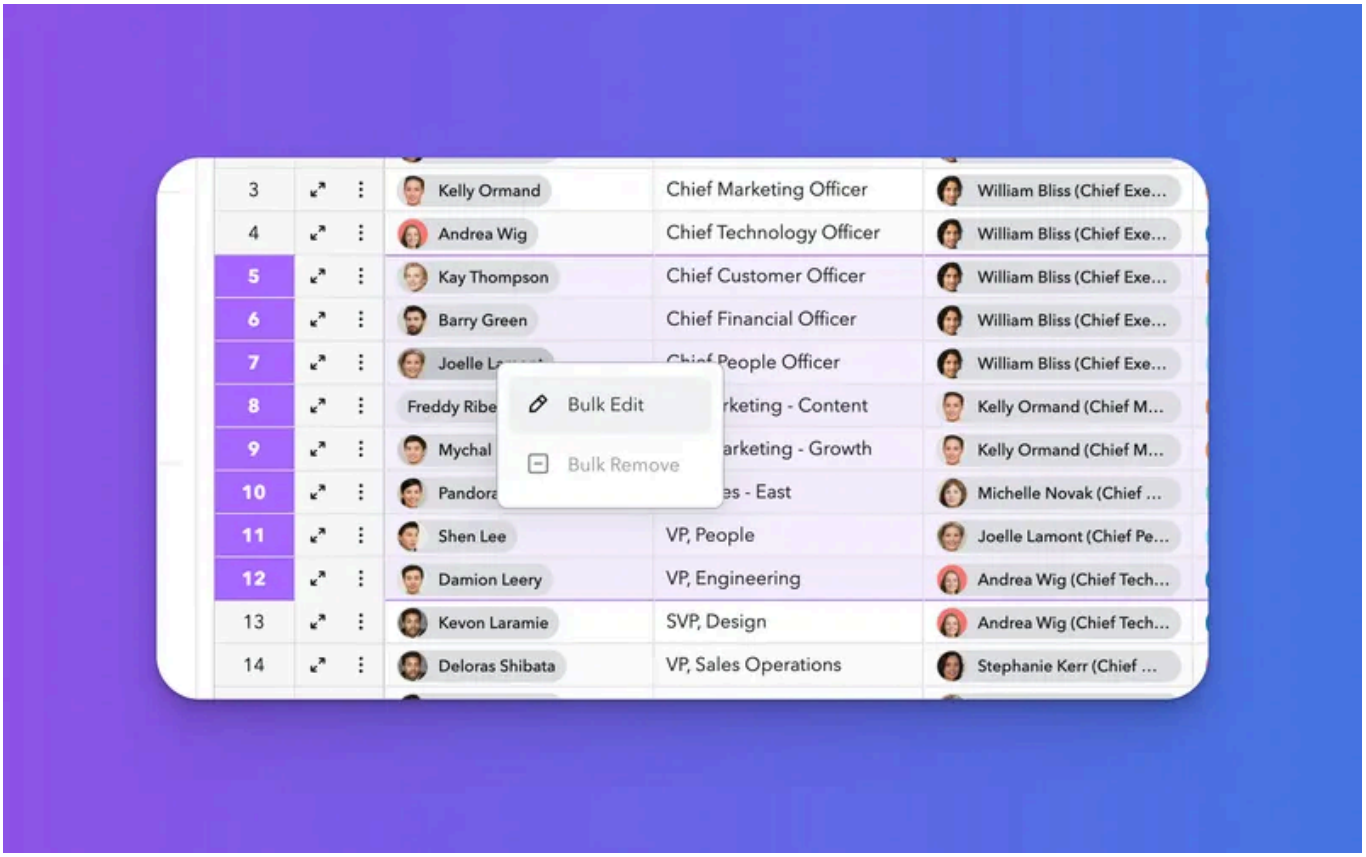
Paste into ChartHop — Copy data from another spreadsheet then paste it into the data sheet. If the cells are editable for you and the values are valid, it will paste in. Then you can adjust or save the changes.

Copy from ChartHop — Select then copy any content, paste it onto a spreadsheet like Excel or Google Sheets. ✨ Magic.

Copy entire data sheet — To copy all of the data and headers, use the **Export** menu at the top right of the data sheet and select **Copy all data & headers**

Bulk Edit

To edit more than One Person or Job at a time, select multiple rows and Right Click on the selected rows and select Bulk Edit.



Exporting

Select the **Download Icon** in the top right corner of the data sheet to bring up the export options:

Copy all data & headers

This option will copy the entire data sheet to clipboard including headers.

This data can then be pasted into a spreadsheet or another system.

Note: this is not recommended for very large data sets.

Export to CSV

Download a CSV of the data. You will be presented with a few options for what format the data can come in.

Syncing Data

ChartHop data sheets can be live synced to a spreadsheet or excel file. See more at **Managing data sheet and calendar syncs**

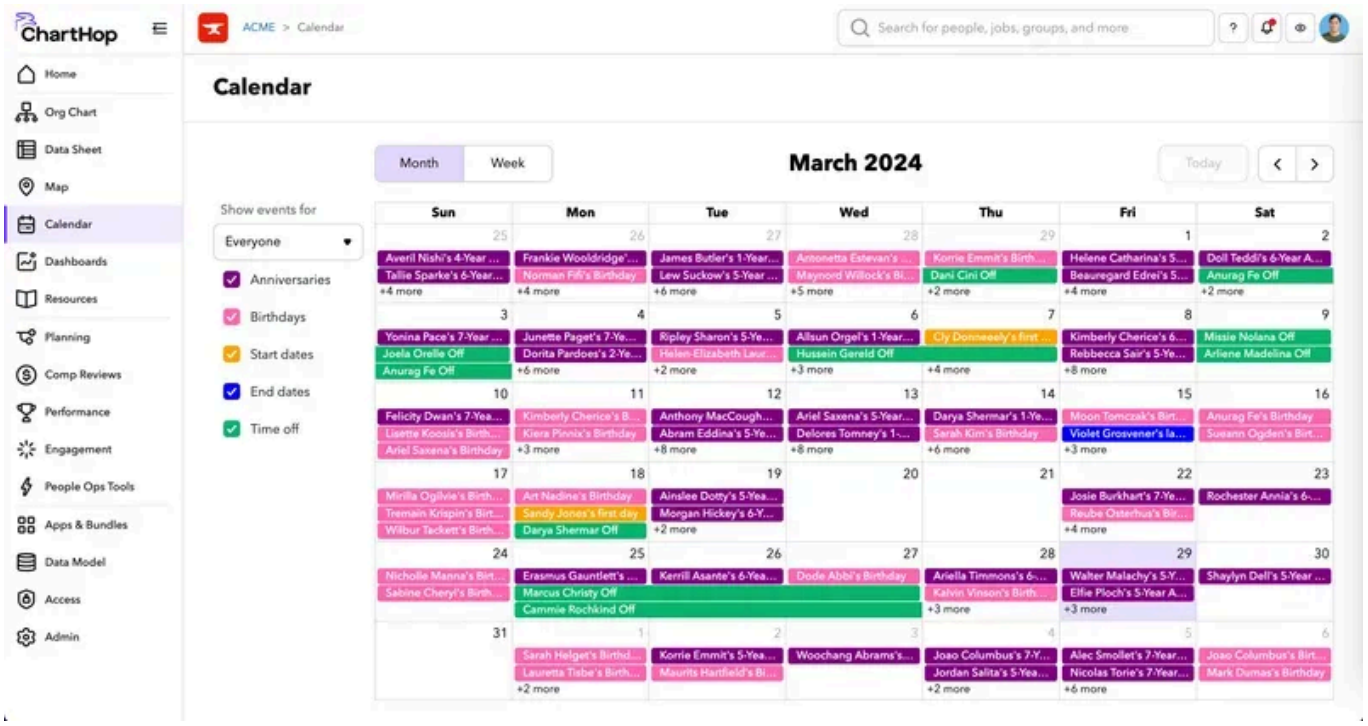
> **Modules:** HRIS | **Engagement** | **Goals** | **Performance** | Compensation Reviews | **Headcount Planning**

2.7. Calendar

The Calendar view is a page on the main navigation of ChartHop that displays key employee dates like Anniversaries,Start Dates and Time Off in a calendar format.

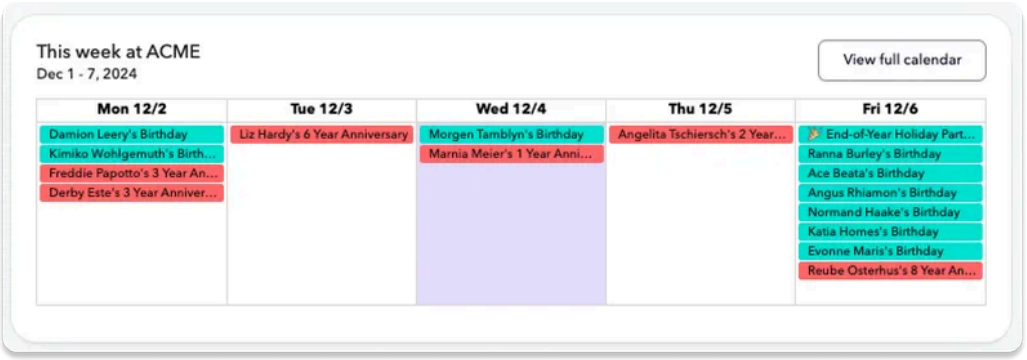
The calendar can be filtered to display events applicable to:

- Everyone
- My department
- My Teams
- My direct reports
- Me
- Custom



"This week" calendar preview on home page

On the home page, a preview of the calendar will display the current week and what events are happening during that week. You can configure this view in **Home Content**.



Calendar configuration

Built-In Calendars

Adding or removing calendars for employee visibility

To add or remove a built-in calendar for employee visibility:

1. Can be done by users with Owner, Org Editor, or People Ops Admin access
2. From the left sidebar, select **Calendars**
3. Check the box of the calendar you want to edit, and update the status to "**Active**" or "**Inactive**"

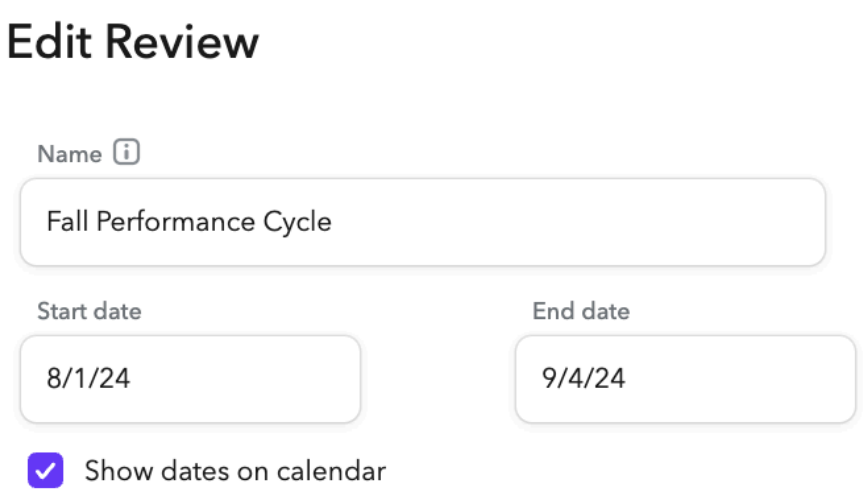
To add or remove other calendars for employee visibility:

1. Can be done by users with Owner, Org Editor, or People Ops Admin access
2. Select the calendar name
3. Click **"Edit Calendar"** on the top right of the page
4. Update the status to "**Active**" or "**Inactive**"

Where the dates come from for each calendar

- **Start Date** and **End Date** → These are date fields that are entered within ChartHop.
- **Anniversary** → This is a calculated field in ChartHop.
- **Birthday** → This is a calculated field containing the month and day from **birth date**. Employees can modify visibility for this field themselves. More information **here**.
- **Tasks** → if a task is assigned with a deadline, the due date is displayed.
- Performance Reviews and Engagement Surveys: When you create a performance review or engagement survey, you can choose whether you want the dates to display

on the calendar:



- **Compensation Reviews** → When a compensation review is launched, the “Review starts” and “Final approval due” dates will display on the calendar. Once the review is closed, those dates will continue to display historically in the calendar.

Calendar Visibility

Survey and task dates

Calendar	Visibility
Performance Reviews	Org public
Engagement Surveys Dates	Org public
Comp Reviews	Visible to participants in cycle
Tasks	Visible to person assigned to task

Employee Dates

Each calendar below respects field or job visibility. The default settings for these fields are below. **Follow these steps** if you’d like to change the visibility of these dates.

Calendar	Visibility
Anniversary	Org Public
Birthday	Org public
Start Date	Org public once the job exists and announced
End Date	Org public on **announce date**

Holiday Calendars

To create a holiday calendar:

1. Can be done by users with Owner, Org Editor, or People Ops Admin access
2. From the left sidebar, select **Calendars**
3. Click “Create Calendar” button on the top right corner of the page
4. Configure your calendar. See the configuration table below for descriptions.

Once you create a calendar, you can add as many events as needed. Once a holiday calendar is created and made "active", it will be visible to all employees.

A Holiday calendar is by default org public. Holiday calendars can be referenced by a time off policy. If a holiday calendar is attached to an active time off policy, it can not be deleted.

Recommended setup for Holiday Calendars

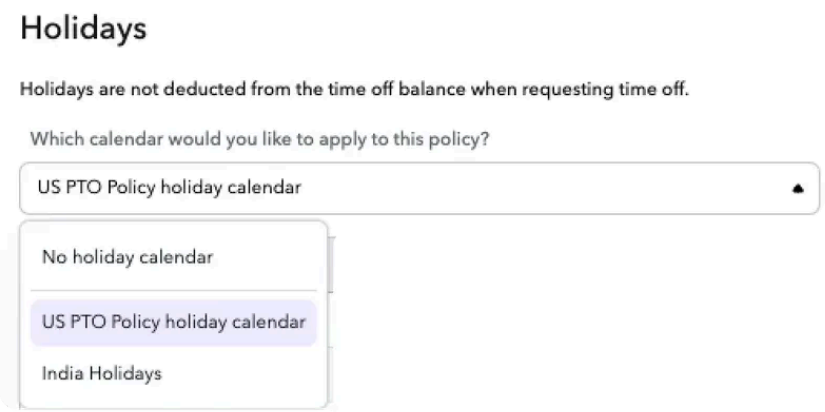
- Most organizations create a Holiday calendar for each country (ie. □□US Holidays, □□ UK Holidays)
- Holiday calendars should span across years. (ie. You should use the same “□□US Holidays” calendar for Holidays in 2025, 2026 and beyond.)

> **Packages:** Basic | **HRIS** | Headcount Planning | Compensation Reviews | Performance | Engagement

Using Holiday Calendars with Time Off

Any "Holiday Type" Calendar can be used in a time off policy.

1. Create a holiday calendar
2. Navigate to people ops tools
3. Select "Time Off Policies"
4. Click "Create policy" in the top corner
5. Your holiday calendars will display in the dropdown menu



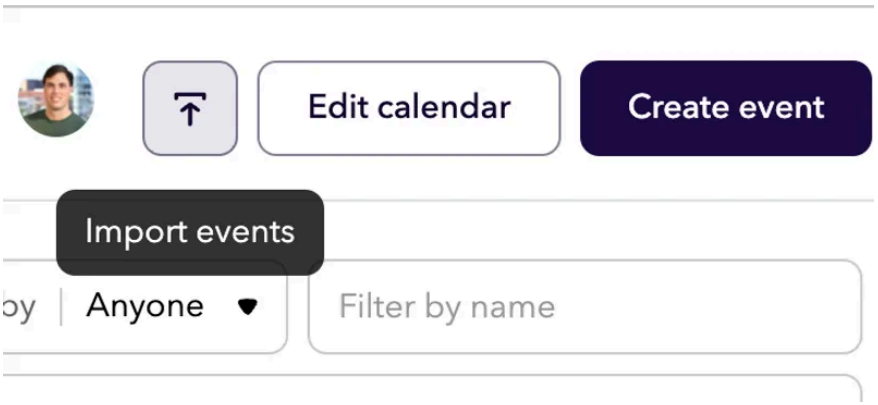
Custom Calendars

Customers using ChartHop's HRIS module can also make custom calendars to display dates their teams need. Custom calendars are guided by the same **share access.**

To create a custom calendar:

1. Can be done by users with Owner, Org Editor, or People Ops Admin access
2. From the left sidebar, select **Calendars**
3. Click "Create Calendar" button on the top right corner of the page
4. Configure your calendar. See the configuration table below for descriptions.

Importing Calendar Events



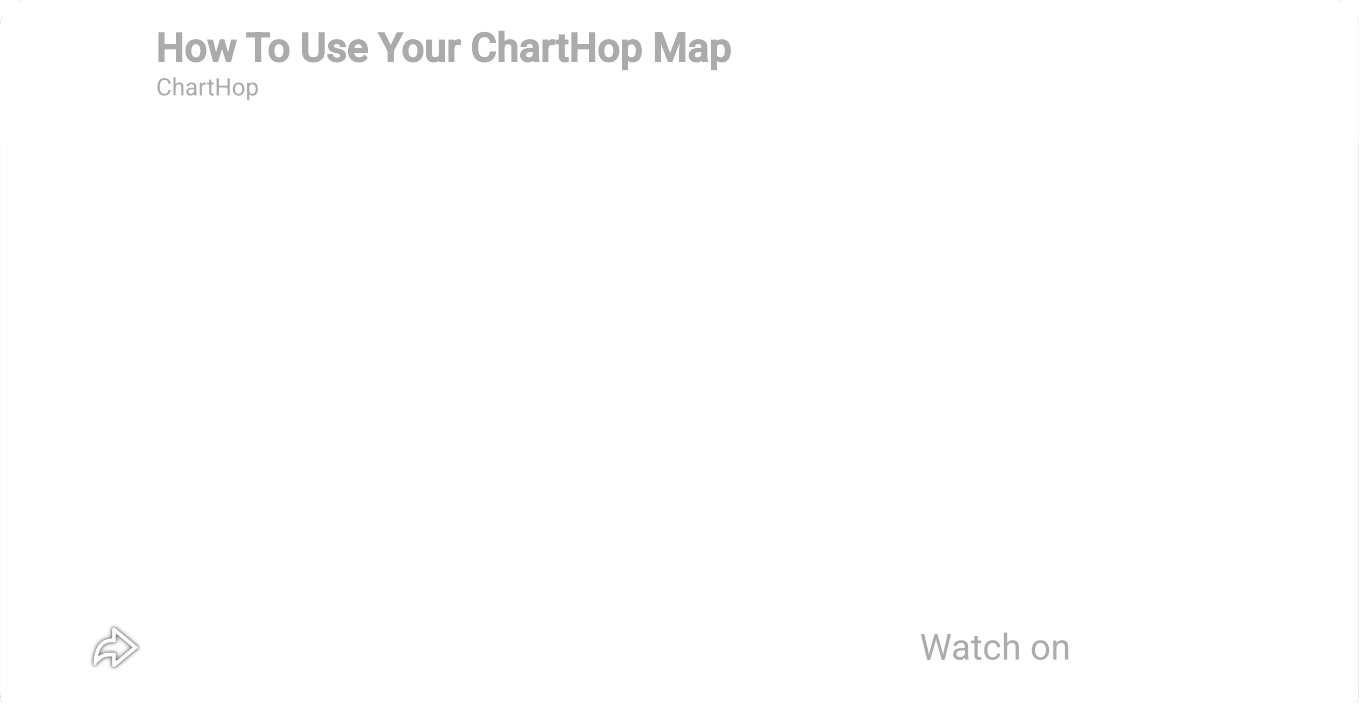
1. Create a calendar
2. Click the **import** button
3. **Download example template** and fill in your events in a CSV
    - You should be able to make over events from Google calendar or Outlook CSV imports
4. Add in the file and import your events

2.8. Map

The map is a visualization tool built on top of ChartHop's powerful people analytics platform.

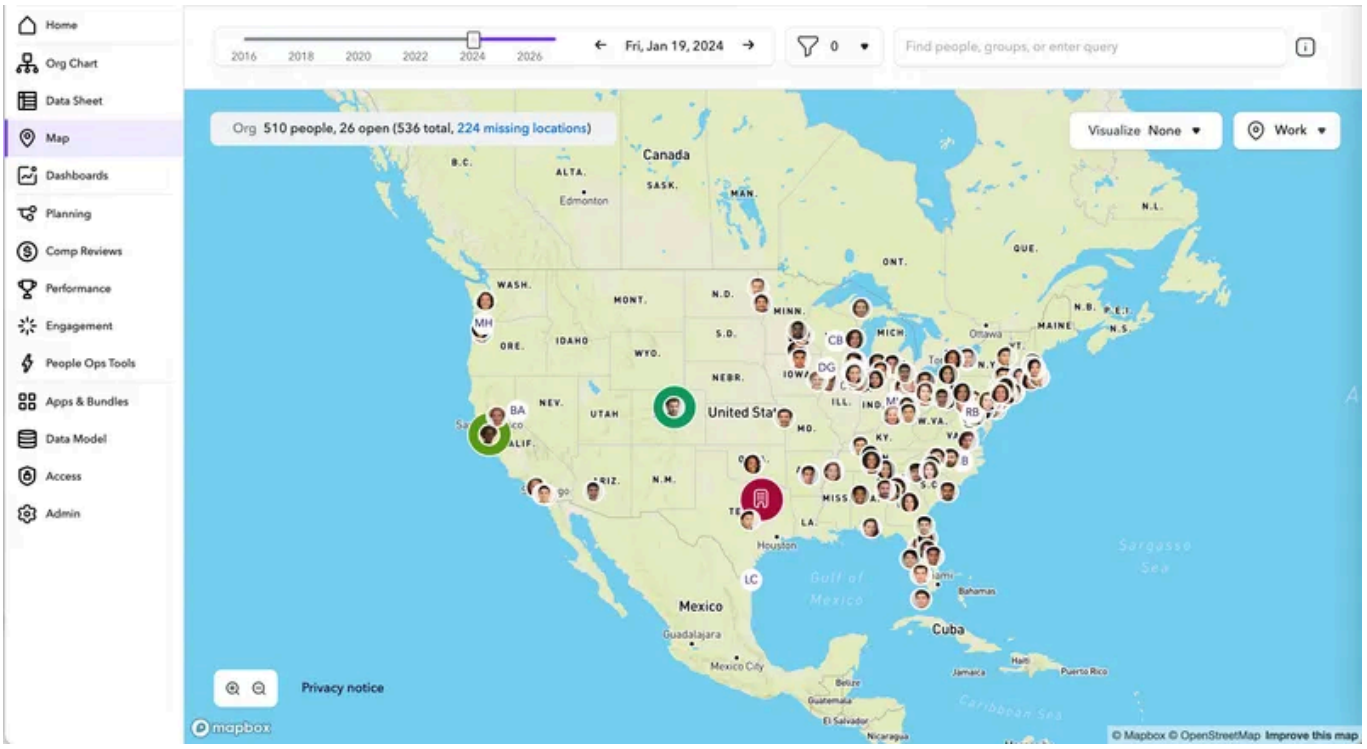
By default, all employees can access the map and view everyone's work locations. Users who have access to sensitive data have an additional option to view employees either by their home or work address.

> To protect employee privacy, exact addresses and locations are concealed and map pinpoints are randomized based on zip code. Only employees with Owner role or a role that gives them access to sensitive information can see exact locations. **Learn more.**



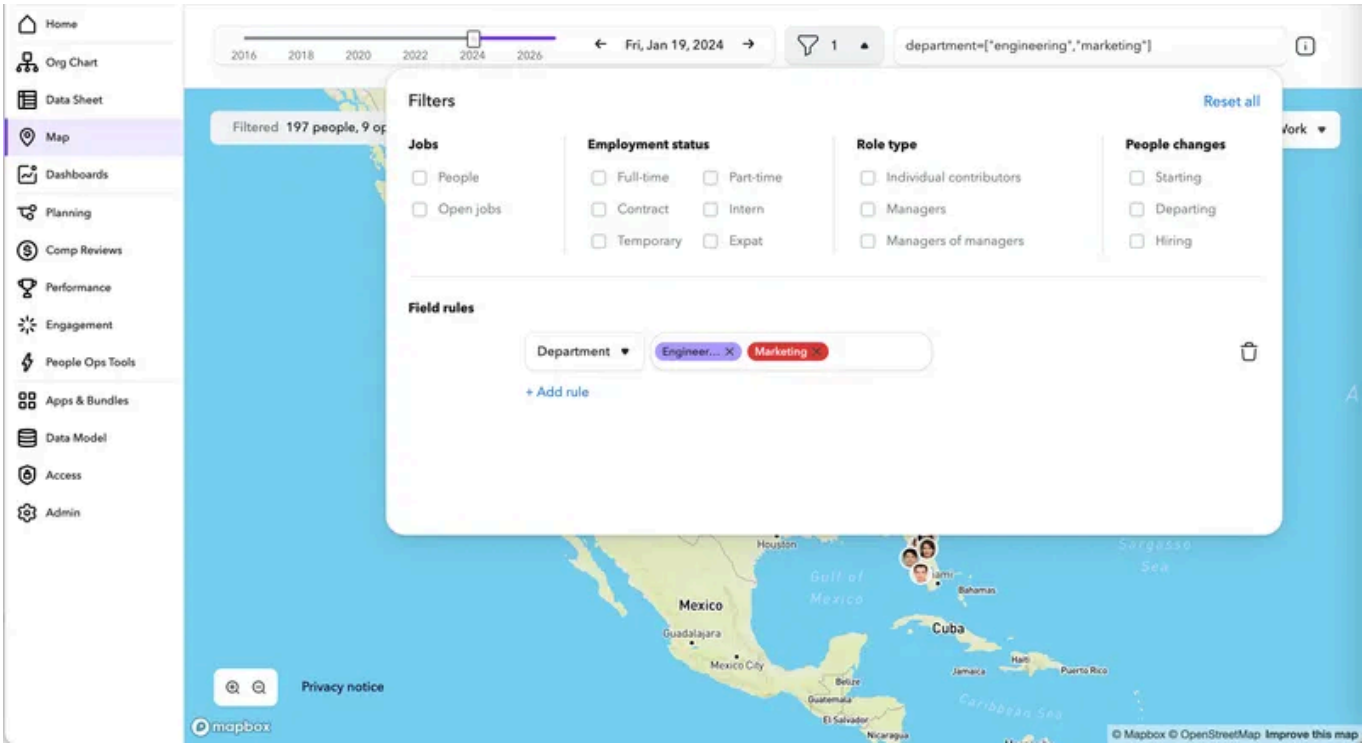
As you create and assign locations to employees in your Groups, they display on the map.

A summary of the number of employees and open roles displays at the top left corner of the map. When employees do not have a defined location, they are indicated as missing locations. You can click on the number of missing locations to open up the **Data Sheet** with a pre-populated list of those employees.



Filtering the Map view

You can use filters to highlight specific teams, departments, and functions on the map.



Visualize map data

For a quick visual, you can apply highlights to employees on your map using the **Visualization** tool. Select a visualization category from the **Visualization** dropdown menu.

Other helpful categories to visualize include:

- Location
- Band
- Team
- Department

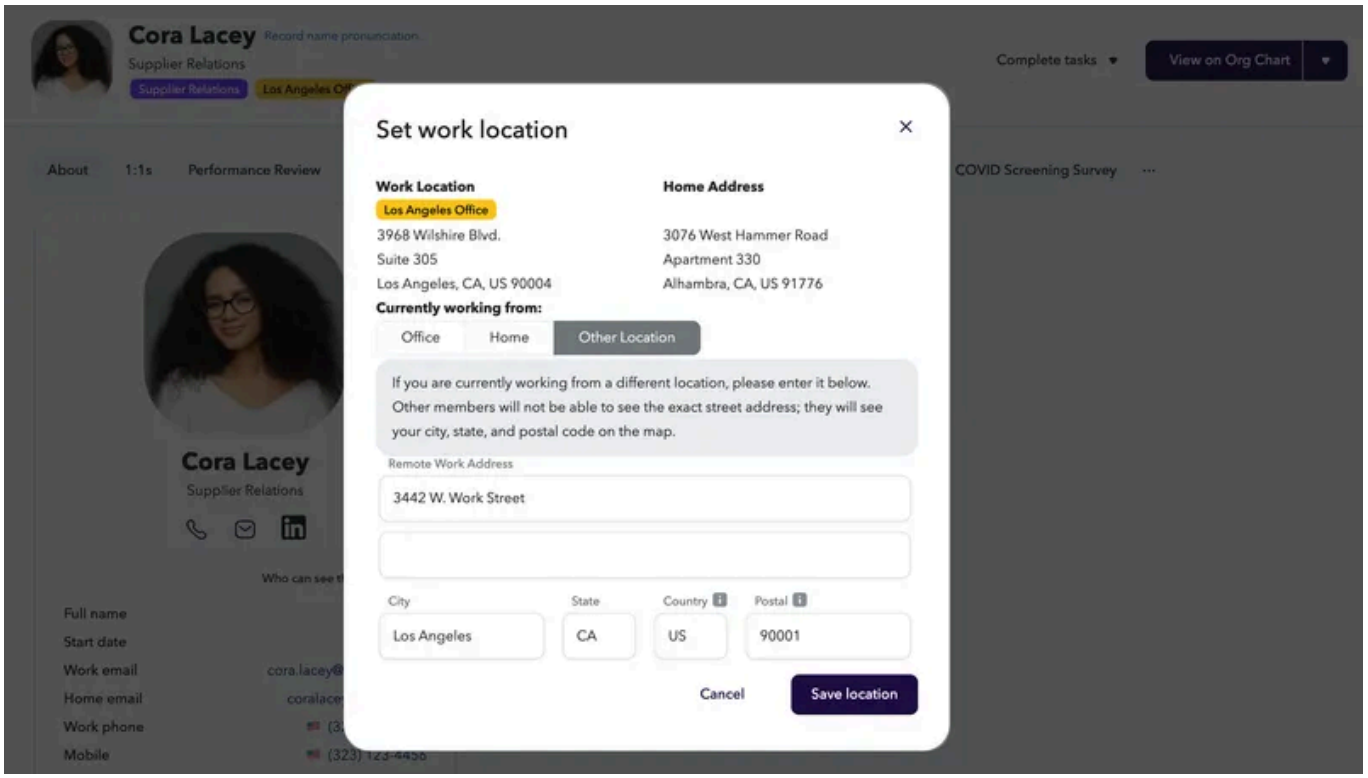
Setting work locations

The map displays any office or remote locations for employees who have a work location address set up. You can set addresses for office and remote locations in the **Locations** tab of the **Groups** page. Learn more.

> If you do not see your work locations appear on the map, check to make sure that they've been assigned both a city and a country.

Set a work location for an employee

As an administrator, you can set a work location for an employee using the **Set work location** option on the employee profile.



To set a work location:

1. Navigate to the employee profile for the person whose work location you want to set.

2. On the employee profile, select the **View on Org Chart ▼** dropdown.
3. Select **Set work location**.
4. Select from one of the three options:
    - **Office** - Select **Office** when the employee is working out of the office defined for the job in the **Locations** field. This can be an office or remote location that you've defined as a Location group. Learn more.
    - **Home** - Select **Home** when the employee is working from their home address location, defined for the employee in the **Home address** fields of their basic info.
    - **Other Location** - Select **Other Location** and enter an address when the employee is working from another work location.
5. Select **Save location** when you're done.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

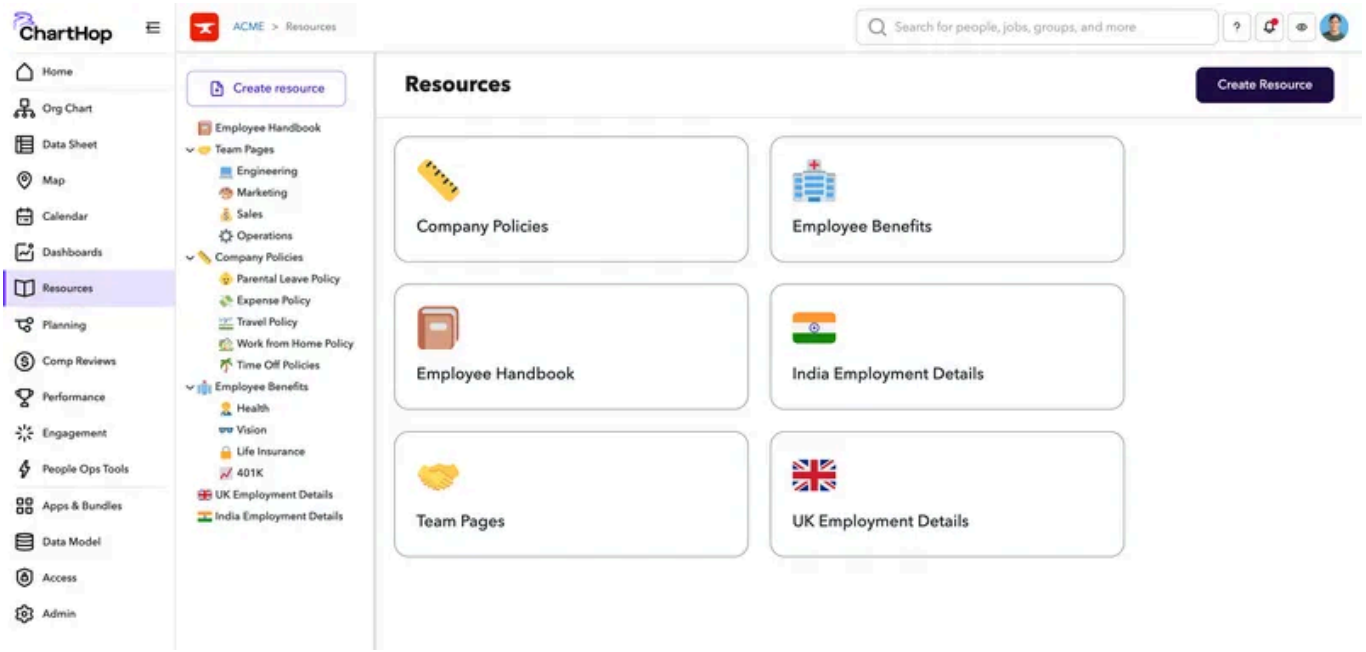
2.9. Resources

Resource pages allow you to make ChartHop your one source of truth for all your people operations information.

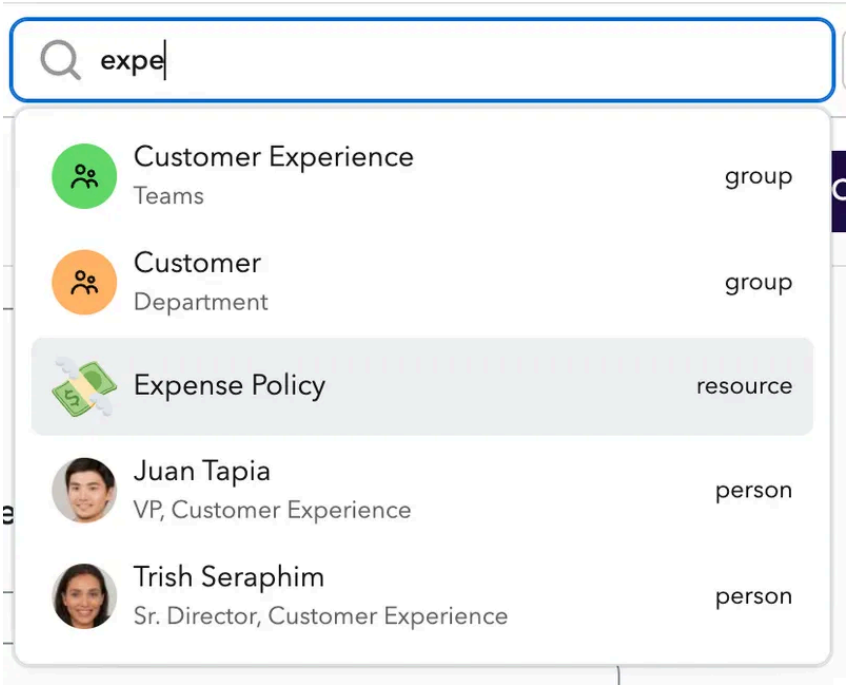
Share your handbook, policies, benefits information and other resources with all or a subset of people.

Accessing Resource Pages

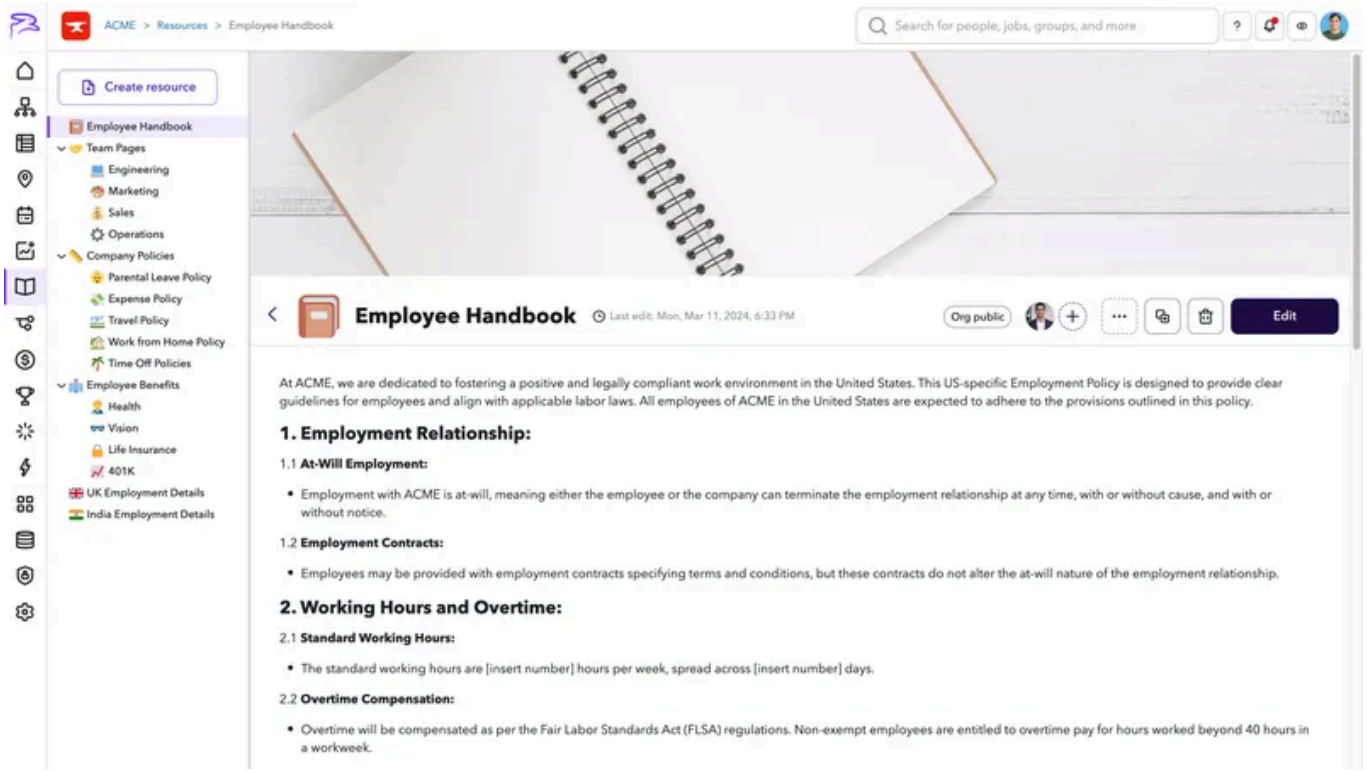
Activating resournce pages will add a new item to the navigation called **Resources**.



Resource pages can also be accessed via the global search, so that employees can easily find the resources they need.



Resources in search

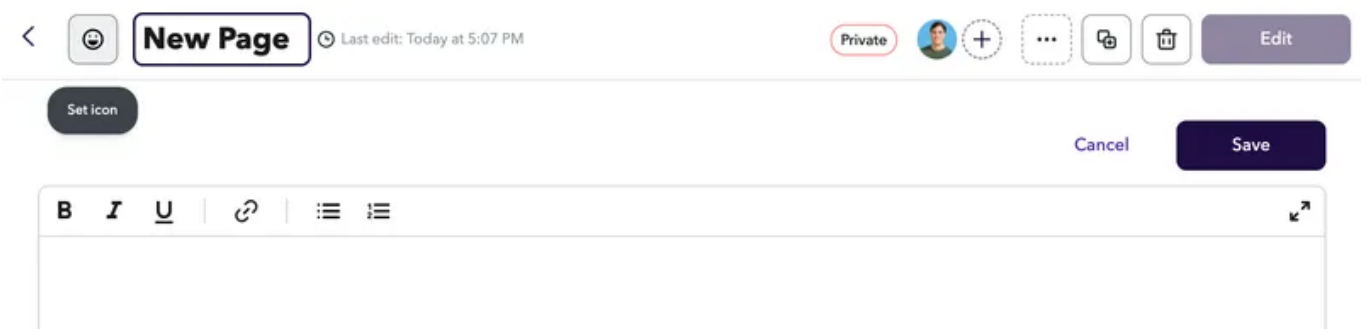


Resource Page

Creating a Resource page

1. Click **Create Resource**
2. Add a Title, Emoji Icon and the content for your resource.

When created, Resource pages are Private, so you are able to draft and review them then publish when you are ready.



A new resource page

Sharing a Resource page

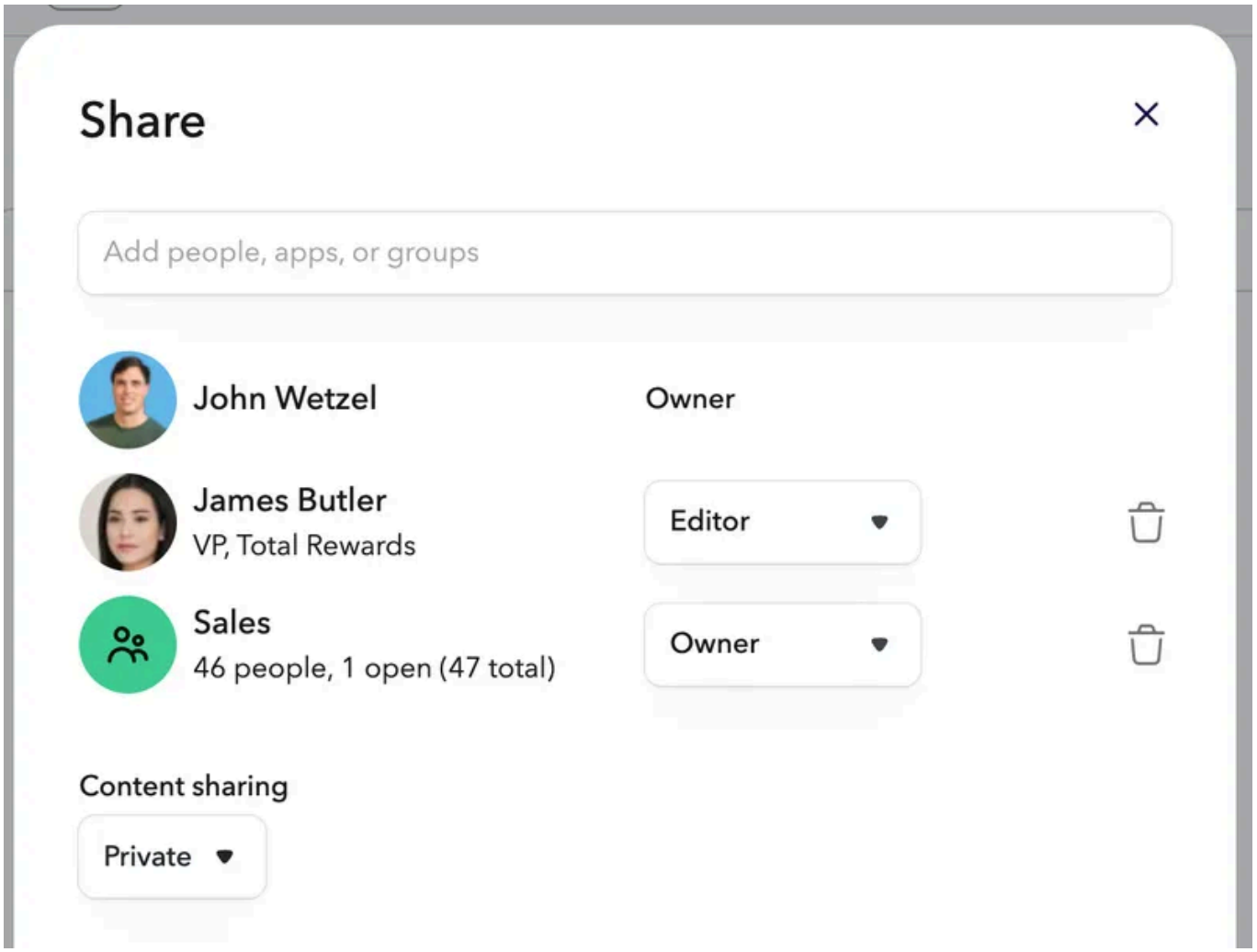
Resources have 2 levels of sharing: Share access and Content sharing.

Share Access

Share access allows people to be an: Owner, Editor, or Viewer. This access is very similar to that of a Google Doc.

For example, if I wanted to share details about a new Sales incentive program with the Sales team only, I could:

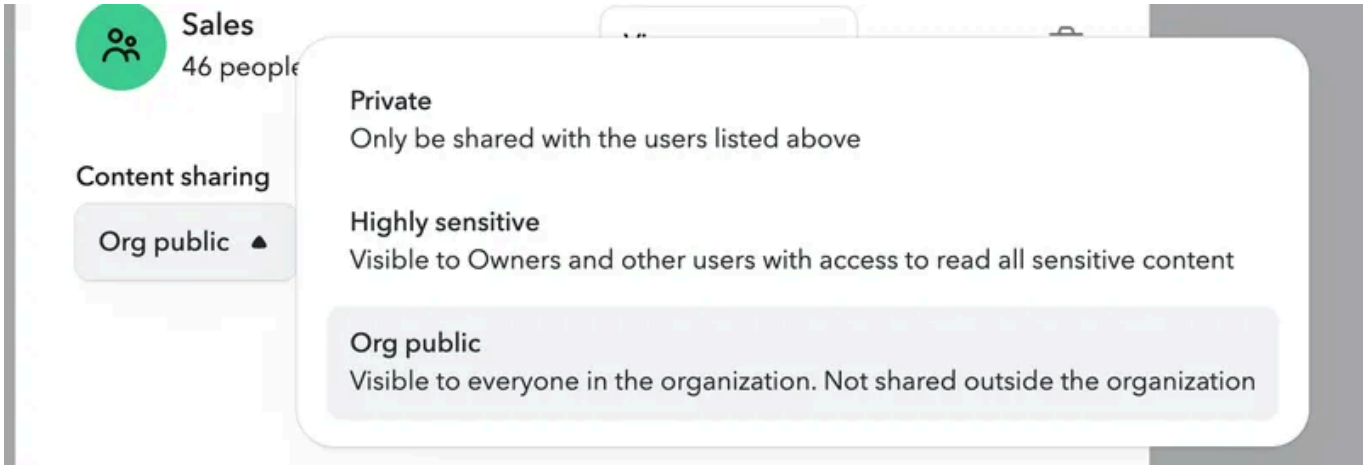
1. Share the resource page with our **VP, Total Rewards as an Editor** so that they could create the documentation they wanted.
2. Then share it with the **Sales department as a Viewer**
3. Because Content Sharing is set to Private, this resource would only be visible to with the VP of Total Rewards or anyone who is in the Sales Department. As people are added or removed from the Sales department, they will automatically gain or lose access to the Resource.



Content Sharing

You can think of content sharing like publishing. It will be most commonly used to toggle between Private and Org Public.

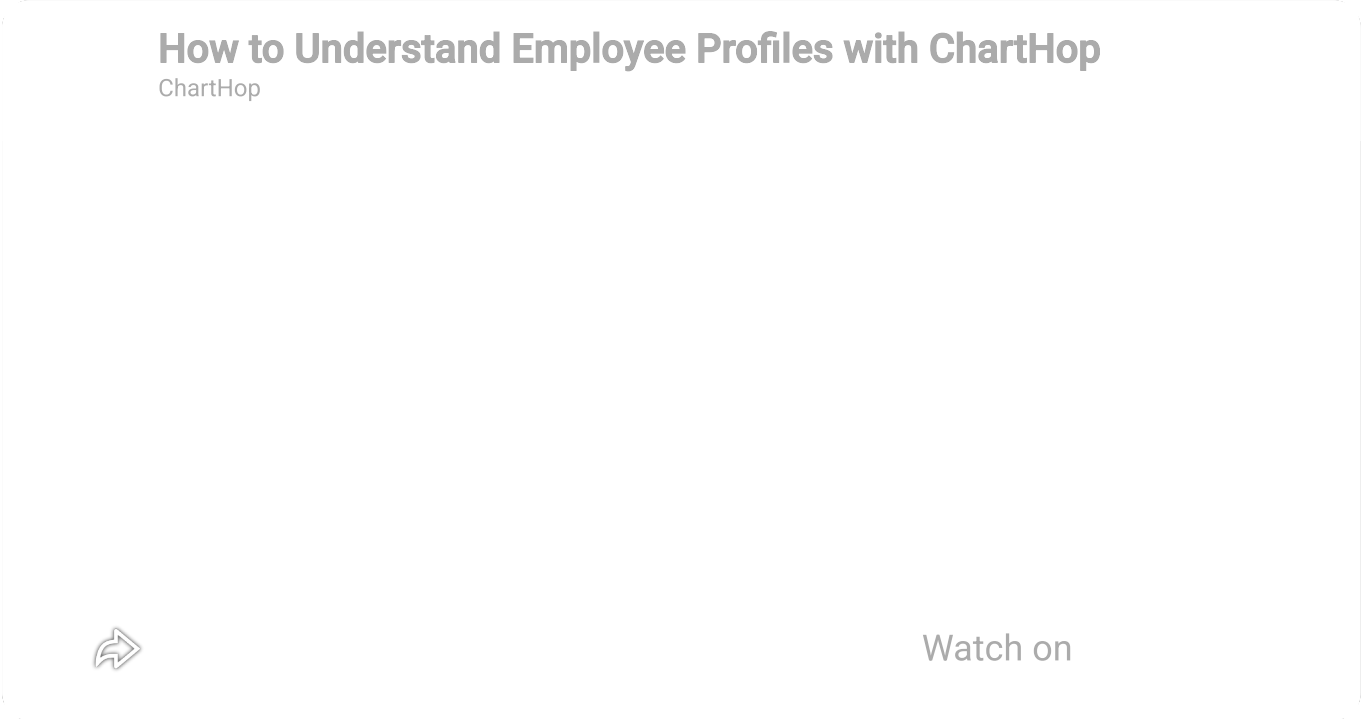
When set to Org Public it will be visible to everyone in the organization.



Content Sharing.

2.10. Employee Profiles

With employee profiles you can complete tasks, submit forms, update personal information, conduct performance reviews, conduct 1:1s, and many other activities.



Employee profile page

The employee profile page has tabs which contain information about the employee's goals, tasks, performance, and more. By default, the page displays an overview of information about an employee in the **About** tab.

Profile panel

The profile panel contains a list of basic information about an employee, for example: start date, gender, and work email. It also includes other fields like personal accounts from LinkedIn, Twitter, and Github.

Reports to panel

The **Reports to** panel shows which manager an employee reports to, and also contains a list of the employee's direct and indirect reports. To view profiles for an employee's direct and indirect reports, select their profile image.

Job Description

The **Job Description** panel displays a general description of the employee's job. If no information has been entered, employees with edit permission are prompted to add information. If the tab is empty and the employee cannot edit it, the Job Description tab is not shown.

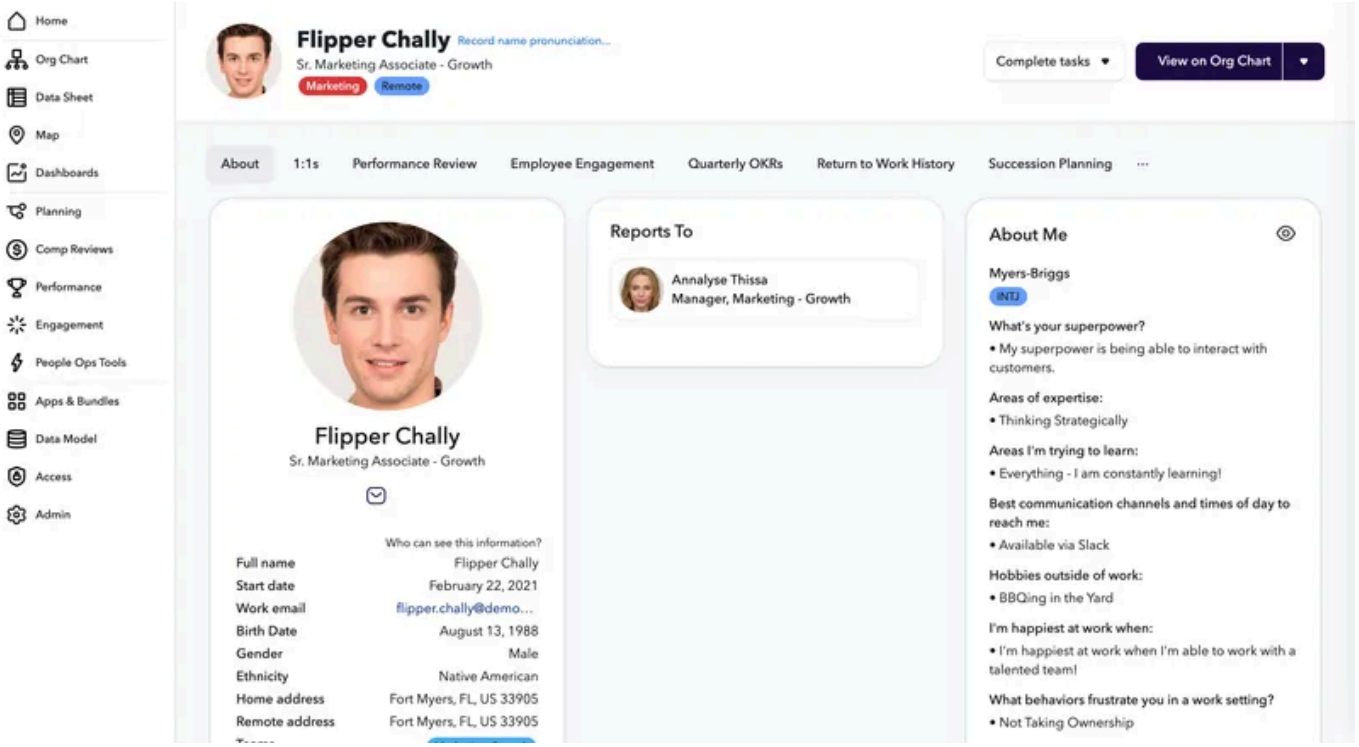
Employees with the correct permissions can also update the job description by editing the job. **Learn more**.

Employee Details

The **Employee Details** panel contains a list of miscellaneous information about an employee. The information available in the panel is based on the results of questionnaires and surveys filled out by the employee.

2.10.1. Viewing employee profiles

From the Employee Profile page, you can view information such as your manager, direct reports, job description, goals, and more.



View your profile

To view your Employee Profile, select **My profile** from the left sidebar.

In the **About** tab, the information on the right side is divided into three areas based on who can view it. Hover over the icons in each section for details.

- **About Me** - Publicly available information that everyone in your org can view. If no information has been entered, employees with edit permission are prompted to add information. If the panel is empty and the employee cannot edit it, the About Me panel is not shown.
- **Personal Data** - Sensitive data that only you and people with Sensitive data access can view.
- **Manager-Shared Data** - Data that you, your manager, and people with Sensitive data access can view.

View another employee's profile

You can view the profiles of other employees in your organization.

1. From the top utility bar, select the **Search Bar** and type in the person's name. You can also find them using the **Org Chart** in the left sidebar.
2. Select the employee whose profile you want to view.
3. In the employee's profile summary, select **View profile**.

2.11. ChartHop Application Sitemap

Use this page as a quick-reference guide to navigate ChartHop. Every major area of the application is listed below, organized by section.

> **Note:** URLs follow the pattern `https://app.charthop.com/[your-org]/...` — replace `[your-org]` with your organization's slug (visible in your browser's address bar). Not all pages are visible to all users; what you see depends on your access role and your organization's active modules.

Home

Page	URL	Description
Home	`/home`	Your personal dashboard — tasks, announcements, and quick links

---

My Profile / Profile

Profile URLs follow the pattern:
`/person/[personId]/[name-slug]/[tab]`

The tab at the end of the URL determines which subpage is shown. Replace `[personId]` with the person's ID and `[name-slug]` with their name in lowercase-hyphenated form (e.g. `jane-smith`).

Profile Subpages

The tabs available on a profile depend on which modules are enabled and what your admin has configured under **Profile Content**.

Tab	URL	Description	Requires
About	`.../about`	Main profile view — fields, contact info, and org details	Always shown
Shoutouts	`.../shoutouts`	Shoutouts given to and received by this person	Configured in Profile Content
1:1s	`.../1:1s`	One-on-one notes and history with this person	Configured in Profile Content
Goals	`.../goals`	Goals and OKRs for this person	Goals module
Tasks	`.../tasks`	Tasks assigned to or about this person	Always shown
Personal History	`.../personal-history`	Audit log of changes to personal (person-level) fields	Always shown
Job History	`.../job-history`	Audit log of changes to job-level fields	Always shown
Form Response History	`.../form-response-history`	All form submissions about this person	Configured in Profile Content
Compensation	`.../compensation`	Compensation history and current pay details	Sensitive data access required
Equity	`.../equity`	Equity grant details and vesting schedule	Equity module + sensitive data access
Time Off	`.../time-off`	Time off balances, history, and upcoming leave	Time Off module
Files	`.../files`	Files attached to this person's profile	Always shown

Tab	URL	Description	Requires
Custom pages	`.../[custom-slug]`	Admins can add additional custom tabs to the profile — for example, to surface specific form responses or other content relevant to your org	Configured in Profile Content

Performance Subpages

Performance-related tabs are added dynamically based on your active **Performance** assessments and **Profile Content** configuration. Their URL slugs are derived from the tab label — for example, a tab labeled "Performance Review" becomes `.../performance-review`.

Common performance tab examples:

Tab Label	URL
Performance Review	`.../performance-review`
Self Review	`.../self-review`
360 Feedback	`.../360-feedback`
Values	`.../values`
Calibration	`.../calibration`

> The exact tabs shown depend on your org's performance review configuration. Admins can add, remove, and rename performance tabs under **Admin → Profile Content**.

User Settings

Page	URL	Description
My User Settings	`/user-settings`	Update your photo, password, notification preferences, and display settings

---

Org Exploration

Page	URL	Description
Org Chart	`/org`	Visual hierarchy of your organization
Data Sheet	`/data`	Tabular spreadsheet view of all people and job data
Map	`/map`	Geographic view of your workforce
Dashboards	`/reports`	Charts and visualizations of org data
Goals	`/goals`	View and manage OKRs and goals
Resources	`/resources`	Internal resource library (HRIS module)

People Ops Tools

Accessed from the left sidebar under **People Ops Tools**.

Page	URL	Description
Automated Actions	`/actions`	Create and manage automated workflows triggered by org events
Custom Calendars	`/custom-calendars`	Manage custom org calendars (e.g. company holidays)
Files	`/files`	Upload and manage files attached to people and jobs
Forms	`/forms`	Build and manage forms for collecting information from employees
New Hire Management	`/new-hire-management`	Track and manage onboarding checklists for new hires
Letter Templates	`/templates`	Create and manage offer letters and other letter templates
Tasks	`/tasks`	View and manage tasks assigned to users
Time Off Policies	`/time-off-policies`	Configure time off accrual policies (Time Off module)

Planning

Page	URL	Description
Planning (Scenarios)	`/scenarios`	Model headcount changes, reorgs, and other scenarios

Comp Reviews

Page	URL	Description
Comp Reviews	`/comp-reviews`	View or manage active compensation review cycles

Performance

Page	URL	Description
Performance Reviews	`/performance`	View and configure performance review cycles

Engagement

Page	URL	Description
Engagement Surveys	`/engagement`	View and configure employee engagement surveys

Apps, Agents & Bundles

Accessed from the left sidebar under **Apps, Agents & Bundles**.

Page	URL	Description
Apps	`/apps`	Connect and manage third-party integrations
Bundles	`/bundles`	Install pre-built template bundles
Agents	`/agents`	Create and manage AI agents (AI Pro module)
Authorization Codes	`/authorization-codes`	Manage OAuth authorization codes for API access

---

Data Model

Accessed from the left sidebar under **Data Model**.

Fields

Page	URL	Description
Fields	`/fields`	Create and manage custom and system fields
Categories	`/categories`	Organize fields into categories for display on profiles

Groups

Page	URL	Description
Group Types	`/group-types`	Create and manage custom group types (requires Group Types feature)
Department	`/department`	View and manage department groups
Location	`/location`	View and manage location groups
Team	`/team`	View and manage team groups

Job Architecture

Page	URL	Description
Compensation Bands	`/comp-bands`	Define salary ranges by level and role
Job Codes	`/job-codes`	Configure job code families used in job architecture

Tables

Page	URL	Description
Tables	`/tables`	Create and query custom data tables

Access

Accessed from the left sidebar under **Access**.

Page	URL	Description
Users	`/users`	Manage who has access to ChartHop
Roles	`/roles`	Create and manage access roles
Permissions	`/permissions`	Define field- and entity-level permissions
Access Settings	`/access-settings`	Configure global access policies (SSO, invitations, email domains)

⚙ Admin

Accessed from the left sidebar under **Admin**.

Admin

Page	URL	Description
General	`/org-settings`	Org name, logo, fiscal year, and other global settings
Financial	`/financial-settings`	Currency, stock valuations, and cost settings
Approvals	`/approval-settings`	Set up approval workflows for org changes (requires Approval Workflows)

History

Page	URL	Description
Org Changes History	`/history`	Audit log of all org changes
Sync & Import History	`/sync-history`	Log of all data imports and integration syncs
Live Queries	`/live-queries`	View and run live CQL queries against org data
AI Usage	`/ai-usage`	View AI feature usage across your org
AI Credit Usage	`/ai-credit-usage`	View AI credit consumption across your org

Configuration

Page	URL	Description
AI	`/ai-settings`	Configure AI features for your org
Core Views	`/core-views`	Configure org chart and data sheet default views
Goal Types	`/goal-types`	Define goal types and measurement methods
Home Content	`/home-content`	Customize what appears on users' Home pages
Modules	`/module-settings`	View and configure active product modules
QES Signatures	`/qes-signatures-settings`	Configure Qualified Electronic Signature settings (requires QES feature)
Profile Content	`/profile-content`	Configure what appears on employee profile pages

Import Data

Page	URL	Description
Import Spreadsheet Data	`/import`	Upload a CSV or spreadsheet to update org data

Account

Page	URL	Description
Labs	`/labs`	Preview and enable experimental features

Search

Press **⌘K** (Mac) or **Ctrl+K** (PC) from anywhere in ChartHop to open the universal search bar. You can search for people, jobs, departments, locations, scenarios, and reports by name.

Additional Tools

Feature	Where to Find It	Description
View As another user	Top bar → Profile Menu → **View As**	Preview ChartHop exactly as another user sees it
Org Switcher	Top bar → Org Logo	Switch between your live org, sandbox, or other organizations
Sensitive Data Toggle	Top bar (lock icon)	Show or hide sensitive data fields — useful during screen shares
Notifications	Top bar (bell icon)	View alerts about tasks, approvals, and other activity

3. ChartHop for Employees

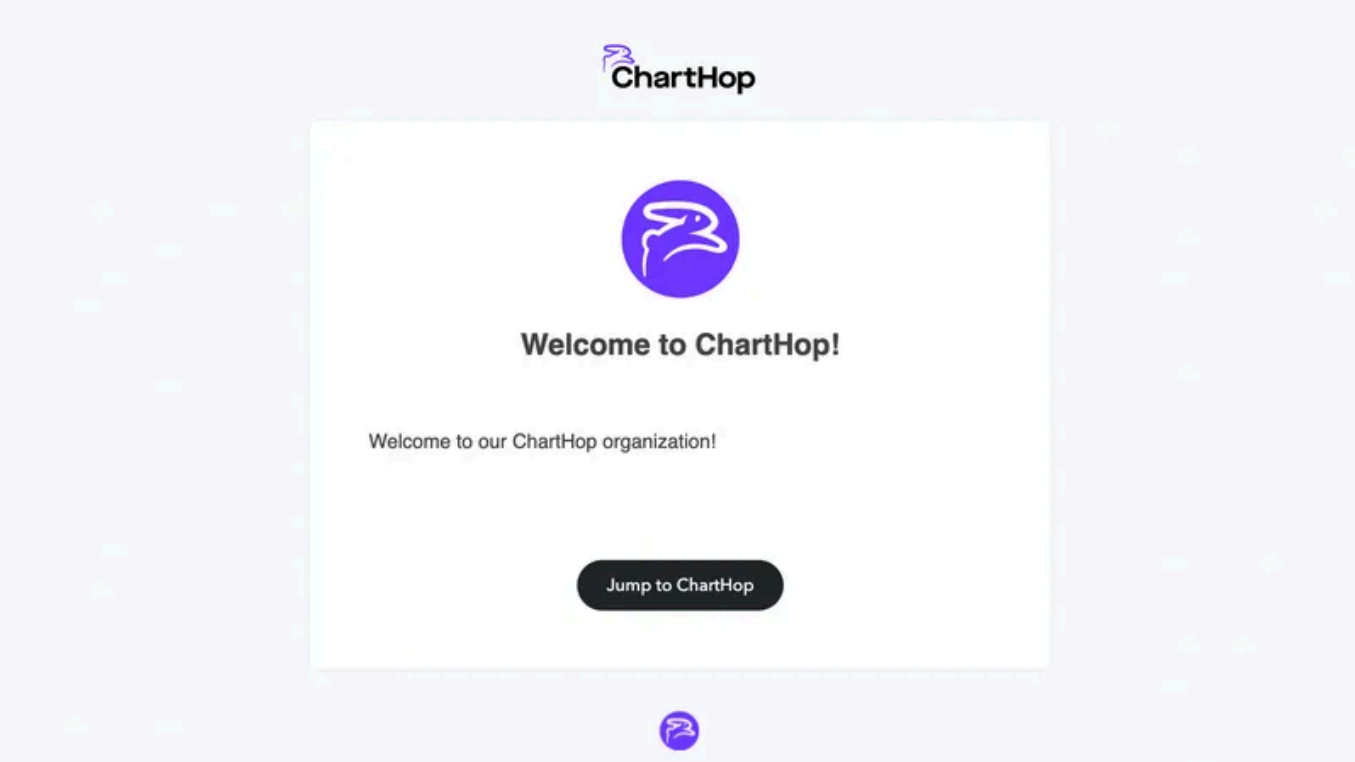
3.1. Signing in to ChartHop for the first time

Welcome to ChartHop!

You can use ChartHop to get context on the structure and people of your organization, see open roles, review your compensation, submit 1:1s to your manager, submit proposals, and stay clear and up to date on the changes going on in your organization.

Your ChartHop administrator has sent you a welcome email inviting you to join ChartHop. Please sign in using the required single sign-on (SSO) option. If you have any issues, please reach out to your ChartHop administrator.

> To prevent any errors when signing in to ChartHop for the first time, make sure any pop-up blockers are disabled in your browser and that you're not signing in using an Incognito or Private Browsing mode.



Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

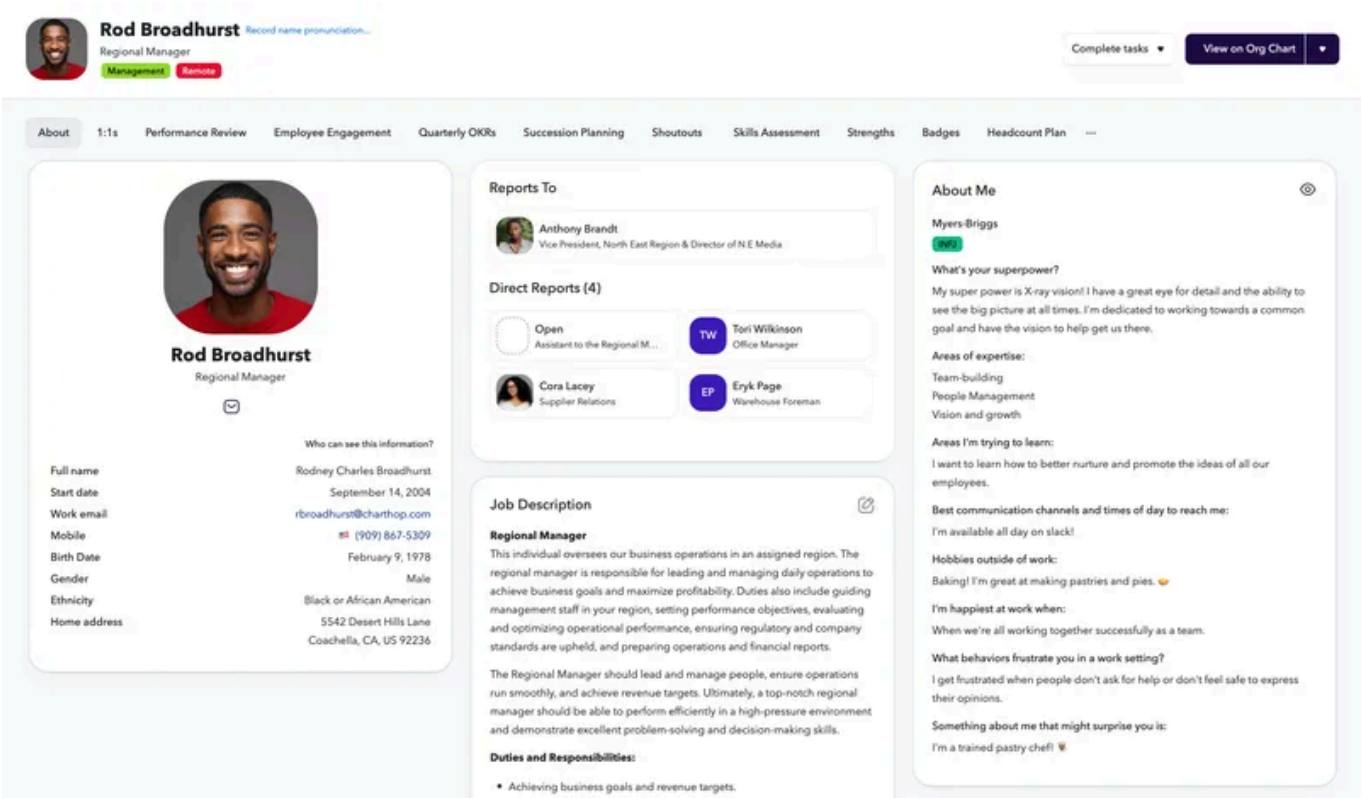
3.2. Customize your employee profile

In your Employee profile, you can view and edit general information about yourself. You can also decide who can see specific information (such as your birthday), as well as use this space as a launching point for completing tasks in ChartHop.

You can check out your employee profile by selecting your profile icon on the left sidebar and selecting **My profile**.

In the **Complete tasks ▼** dropdown, you can fill out any forms your organization has set up for you, such as the **About Me** form. In the **About Me** section, you can let everyone in the organization know all about you: when and how to best contact you, your working style, and random fun facts about you.

> The forms that are available for you to fill out depend on your organization and may be different from the ones described here.

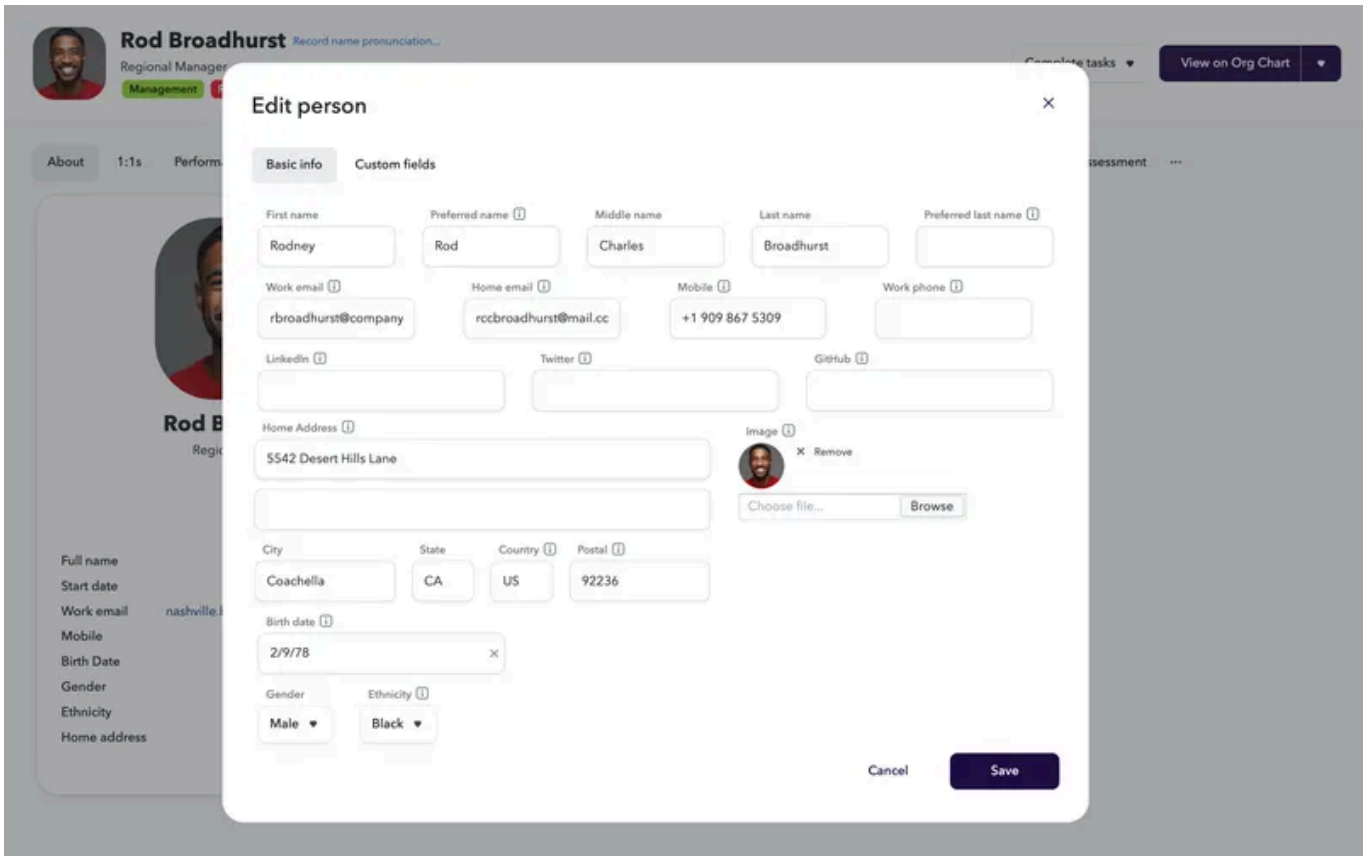


> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

3.2.1. View your profile information

You can view basic information about yourself in your profile, including your home address, preferred name, and email address. When your organization has custom fields set up, those fields include additional information about yourself.

> Please note that some of these fields may be managed by your HR team and should not be edited. To prevent losing any of your information, please reach out to your HR team before making changes and to understand which fields should not be edited.



To view your basic information:

1. From the left sidebar, select **My Profile**.
2. In the upper right, find the **View on Org Chart ▼** dropdown menu. From the list of options select **Edit my info**.
3. View your information in the **Edit person** dialog.
    - **Basic info** - Includes general information such as your name, birthdate, emails, phone numbers, addresses, gender, ethnicity, and more. For descriptions of basic

info fields, see the table below.
    - **Custom fields** - Includes additional information collected by your organization. The fields on this tab can vary depending on your organization.
4. Select **Save** when you're finished.

Basic info fields

This table describes the Basic info fields on the **Edit Person** dialog:

> Please note that some of these fields may be managed by your HR team and should not be edited. To prevent losing any of your information, please reach out to your HR team before making changes.

Field	Description
First name	Your first name (Required)
Preferred name	Your preferred first name. This overwrites your first name throughout ChartHop.
Last name	Your last name (Required)
Preferred last name	Your preferred last name. This overwrites your last name throughout ChartHop.
Middle name	Your middle name
Work email	Your work email
Home email	Your personal email
Mobile	Your mobile phone number. For international numbers, add the plus (**+**) symbol and the country code.
Work phone	Your work phone number. For international numbers, add the plus (**+**) symbol and the country code.
LinkedIn	The url to your LinkedIn page
X (Twitter)	The url to your X (Twitter) handle
Github	The url to your Github profile
Home Address	Your personal home address
Image	The image that is used as your org profile image
Birth date	Your date of birth
Pronouns	Your pronouns. These display to the rest of your organization on your profile next to your name.
Gender	Your gender
Ethnicity	Your ethnicity

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

3.2.2. Control what people see on your profile

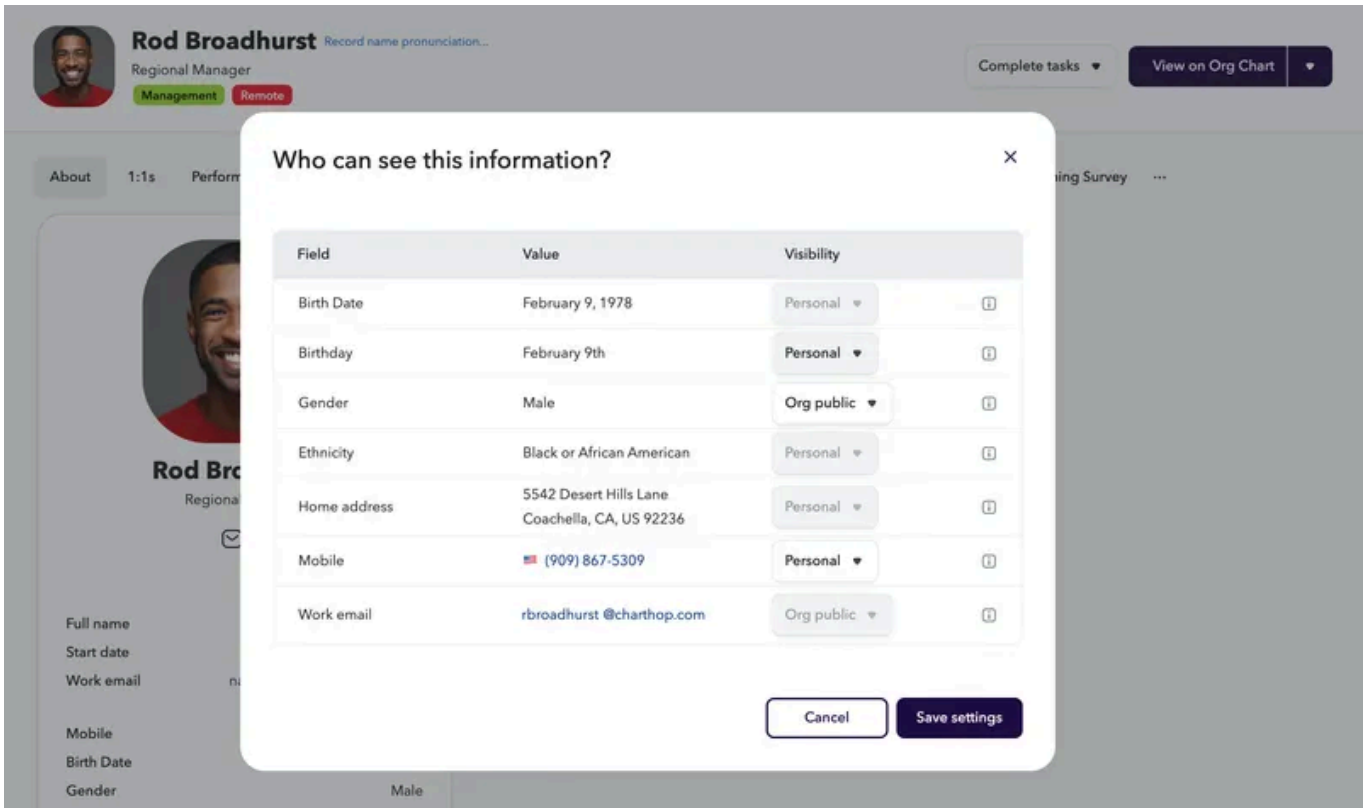
You get to decide who in your organization can see specific personal information. For example, you can configure your settings so that only you can see your birthday.

> Administrators at your organization with the following access roles can still view this information, even when you change the visibility settings:
>
> - Sensitive data viewer
> - Owner
> - Org editor
>
> Birthdays continue to display in the Calendar on the Home page for those with sensitive data access.

Visibility settings for your profile

Visibility settings control who can see the information on your profile. For example, if you want to hide your birthday so that nobody can see it, you can change the **Visibility** dropdown in the Birthday row to **Personal**. This indicates that only you will be able to see your birthday on your profile.

Depending on your organization's settings, you might not be able to control the visibility settings for all fields.



The following visibility settings are available:

Visibility	Description
Personal	Only you can see this information.
Manager-shared	Only you and your manager (and managers above you through your reporting line) can see this information.
Org shared	Everyone in your organization can see this information.

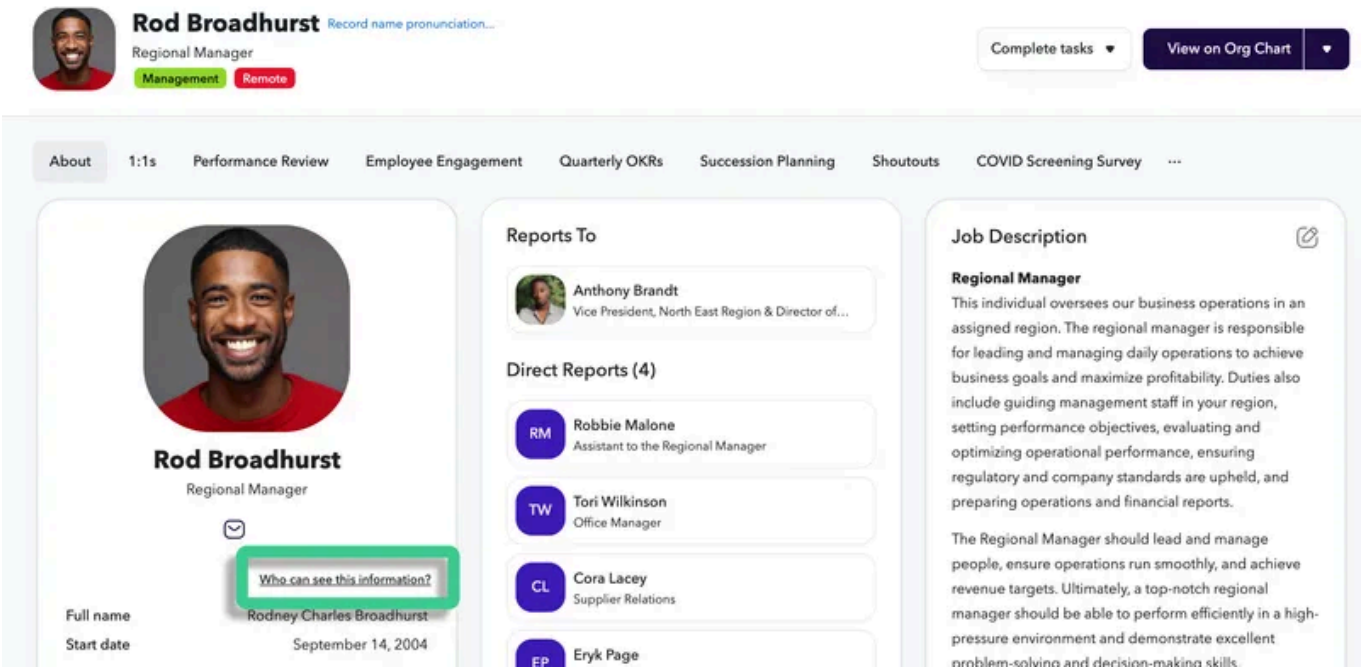
You always have access to your own sensitive personal data and it displays on your employee profile to you when you don't have sensitive data hidden.

To hide your sensitive data, for example, when screen-sharing your profile with someone else, toggle the eye icon to hidden. **Learn more.**

Hide information on my profile

Other people in your organization can't see any of your sensitive data (such as your home address or full birthdate) unless they specifically have access to it (such as an HR coordinator).

However, you can still hide certain public information from your profile, depending on your organization's configuration.



To hide information on your employee profile:

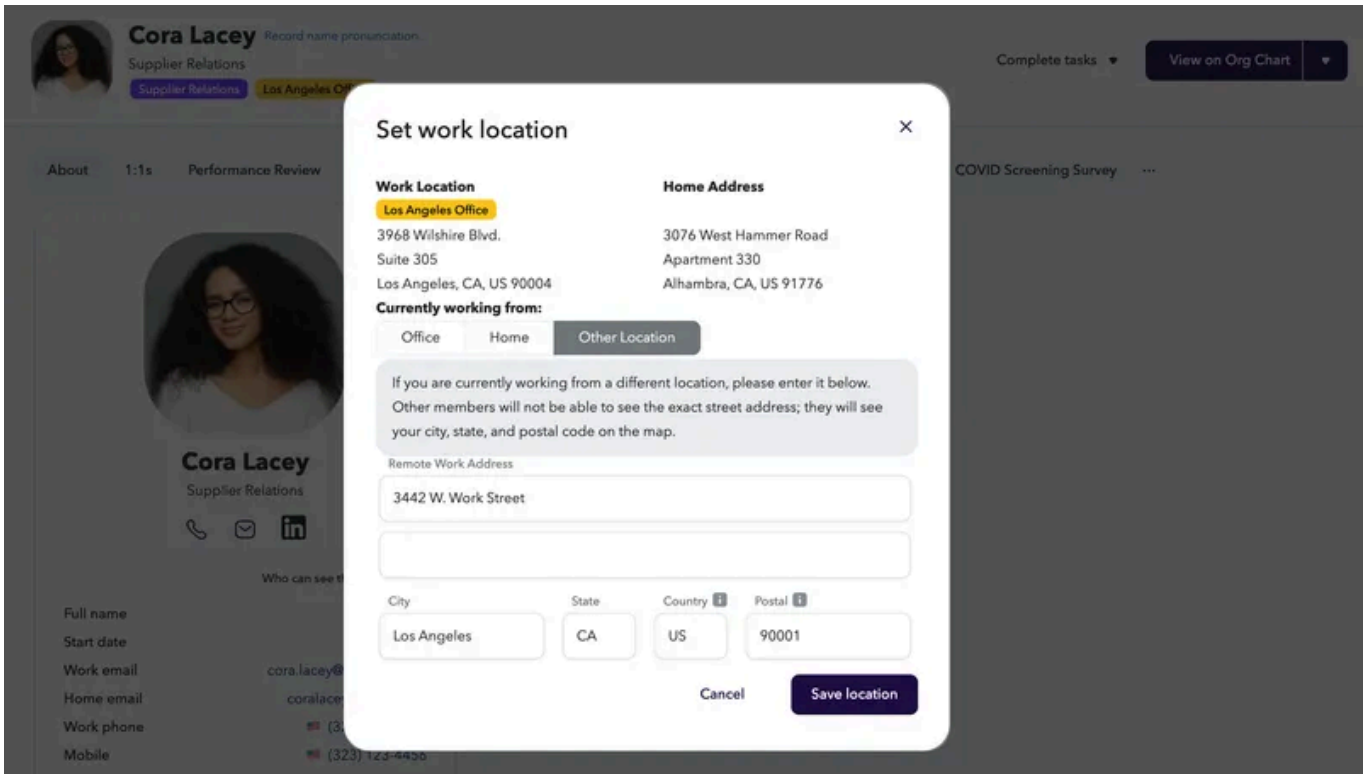
1. From the left sidebar, select **My Profile**.
2. In the **About** employee profile tab, select the **Who can see this information?** link.
3. In the **Who can see this information?** dialog, edit the visibility settings of the information you want to hide.
    - You can choose from the following options:
        - **Personal** - Only you can see this information.
        - **Manager-shared** - Only your manager (and managers above you through your reporting line) can see this information.
        - **Org public** - Everyone in your organization can see this information.
4. Once you're done editing, select **Save settings**.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

3.2.3. Set your work location

You can update your current work location and home address directly from your employee profile.

Your work location is what displays to your organization on the Map. Other people in your organization are not able to see exact street addresses. Instead, they only see your city, state, and postal code on your employee profile. Your location on the map is randomized by zip code so others can't see your exact location. **Learn more.**



When you work in an office location or are permanently remote, your work location defaults to that office or remote location defined for you by your organization. If you move to a different office, your ChartHop administrator can update your default office location.

Add or change a remote work address

When you have a temporary address dedicated to remote work that is different from your home address, you can set up another remote work location.

To set up another remote work location:

1. From the left sidebar, select **My Profile**.

2. In the upper right, find the **View on Org Chart ▼** dropdown menu. From the list of options select **Set work location**.
3. Select **Other Location**.
4. Enter the address for your remote location.
    - Make sure to enter a city, country, and zip code so that your location displays correctly on the map.
5. Select **Save location** when you're done.

When you return to the office, you can return to the **Set work location** option and select **Office** to update your work location.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

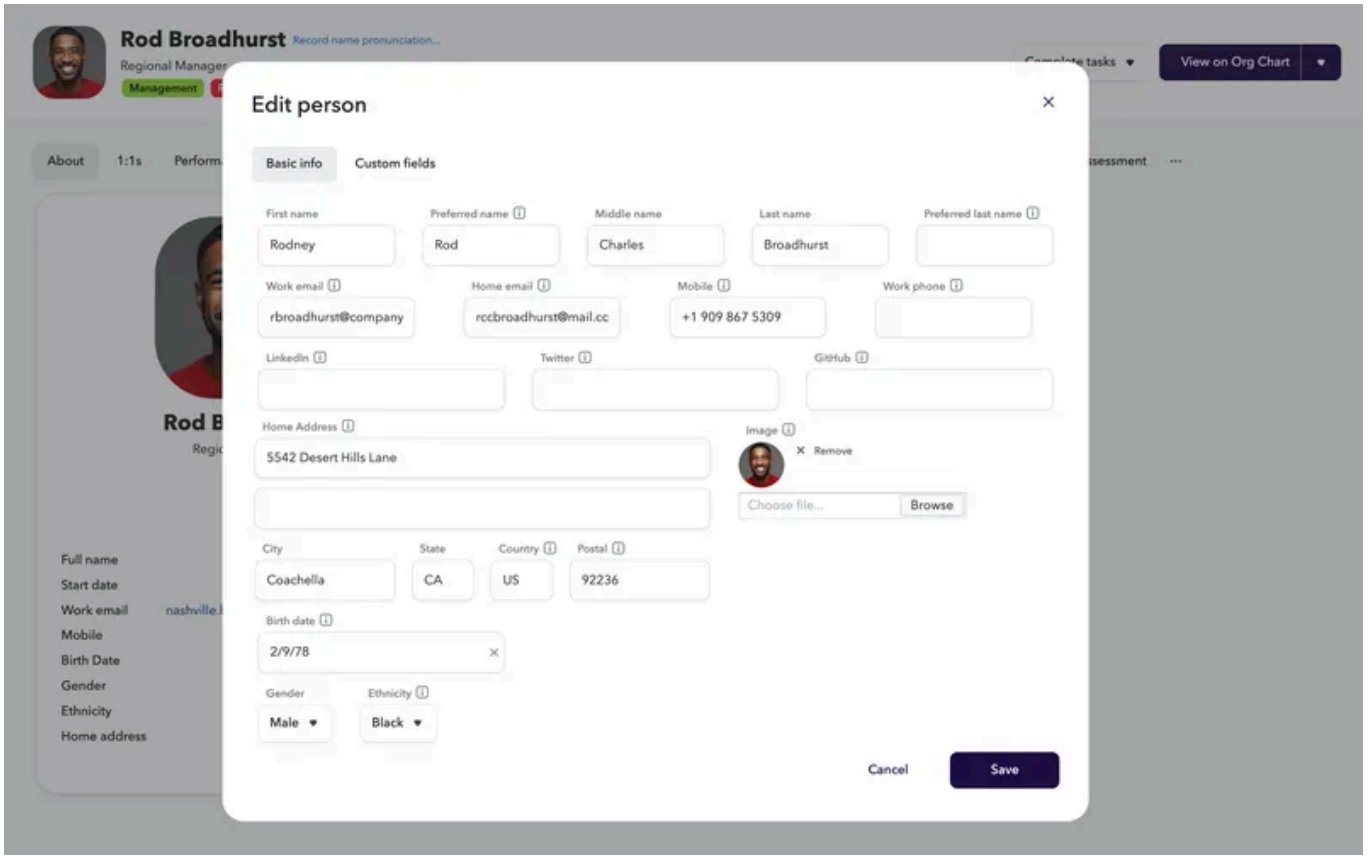
3.2.4. Update your org profile image

Your org profile image displays to the rest of your organization whenever your organization is visualized (for example, in your employee profile, in the **Org Chart**, **Data Sheet**, and **Map**).

Update your org profile image

You can edit your org profile image from your employee profile.

> When your organization is integrated with Slack, your Slack profile image is automatically imported and used as your default org profile image. You can update that default image from your employee profile.



To update your org profile image:

1. From the left sidebar, select **My Profile**.

2. In the upper right, find the **View on Org Chart ▼** dropdown menu. From the list of options select **Edit my info**.
3. In the **Edit person** dialog, navigate to the **Image** field.
4. Select **Browse** and select an image file to upload.
    - You can upload an image in PNG or JPG format.
5. Select **Save** when you're finished.

Users who have access to multiple ChartHop accounts can also choose a different user profile image. It is not recommended to change your user profile image unless you meet this criteria.

Your user profile image is used whenever you make changes in ChartHop as a user (for example, when entering comments or changes in a scenario or review). The user profile image always displays in the top utility bar.

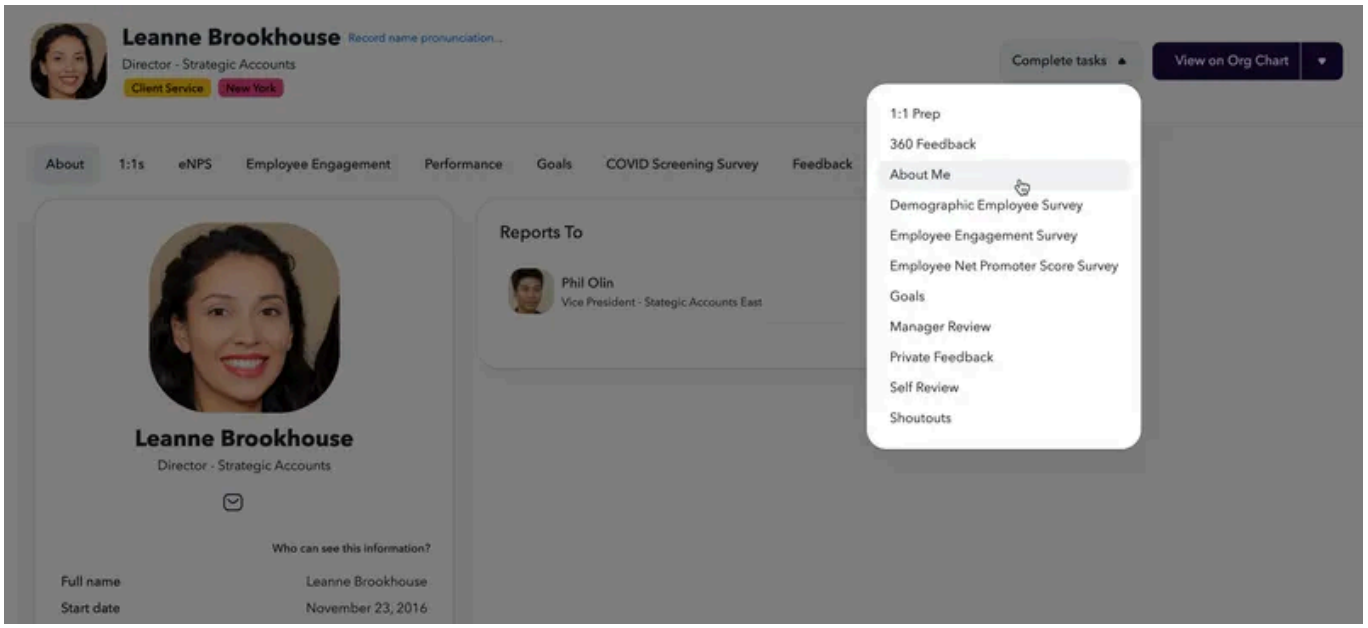
You can update your user profile image from the **User Settings** page. **Learn more.**

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

3.3. Complete tasks and forms

From your profile page, you can complete tasks that are assigned to you. This can include anything from a recurring 1:1 form or a one-time engagement survey.

> Employee tasks display differently in ChartHop Basic.



Complete tasks

As an employee, when viewing your own profile, you can see all of your assigned forms listed under the **Complete tasks** dropdown. Forms listed under **Complete tasks** can be either recurring or one-time tasks.

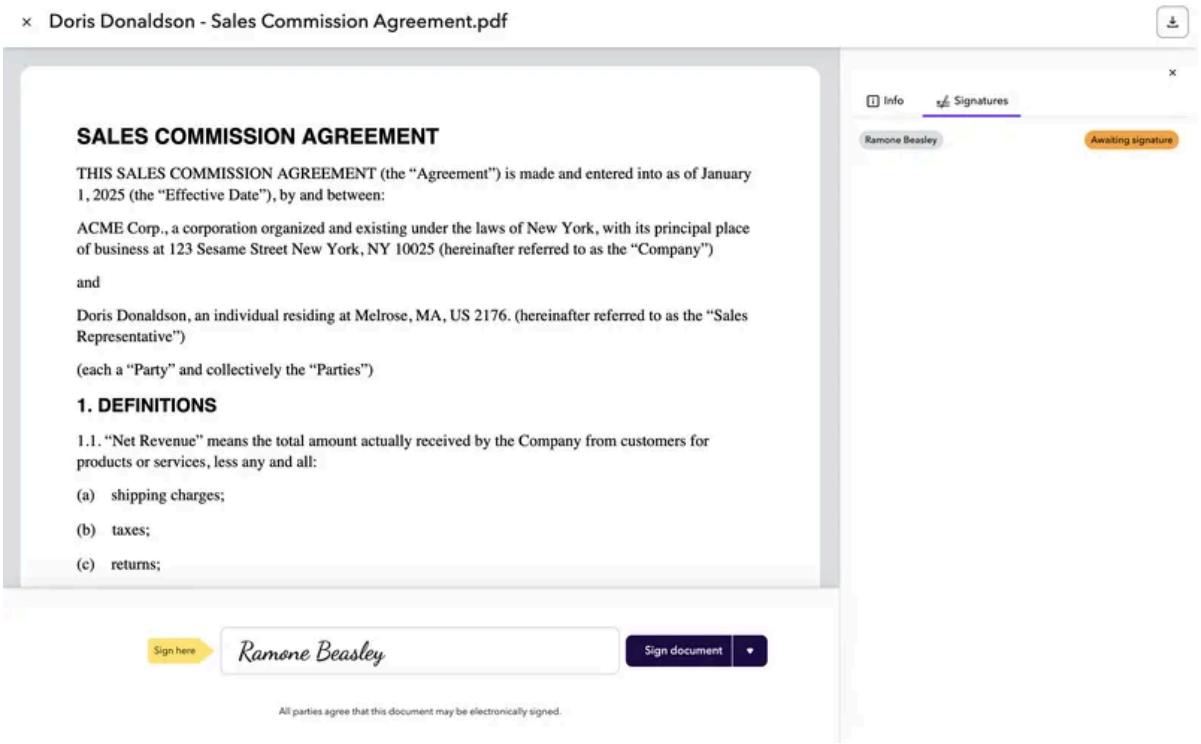
To complete a task:

1. From the left sidebar, select **My Profile**.
2. From your profile page, in the upper right select the **Complete tasks ▼** dropdown.
3. Select a form or task to complete.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

3.3.1. Signing a document

If you need to sign a document in ChartHop, your will receive a notification via email or Slack and you will see a task in your ChartHop dashboard. Click the **Review and Sign** button to be taken to the signing page.



Signing a document

When you receive your document, please review it carefully and understand what you are signing in full, as it is a legally binding e-signature.

To sign a document:

1. Click the **Review and Sign** button to view the document.
2. Review the document.
3. Type your name into the box labeled **Sign here.**
    1. You can sign with any case sensitive combination of your `First Name` or `Preferred First Name` and `Last Name` or `Preferred Last Name`.
4. Click **Sign document.**
5. You have now signed the document.

You can now:

- View your signature at the bottom of the document.
- Check your email for a confirmation and signed copy.
- Download the signed document via the download button in the top right corner of the page.

Signing a document with QES

If you company is using **Qualified Electronic Signatures (QES)**, for your signature, then you will be redirected to a page hosted by BoldSign to sign the document. Once you have signed you will be redirected back to ChartHop.

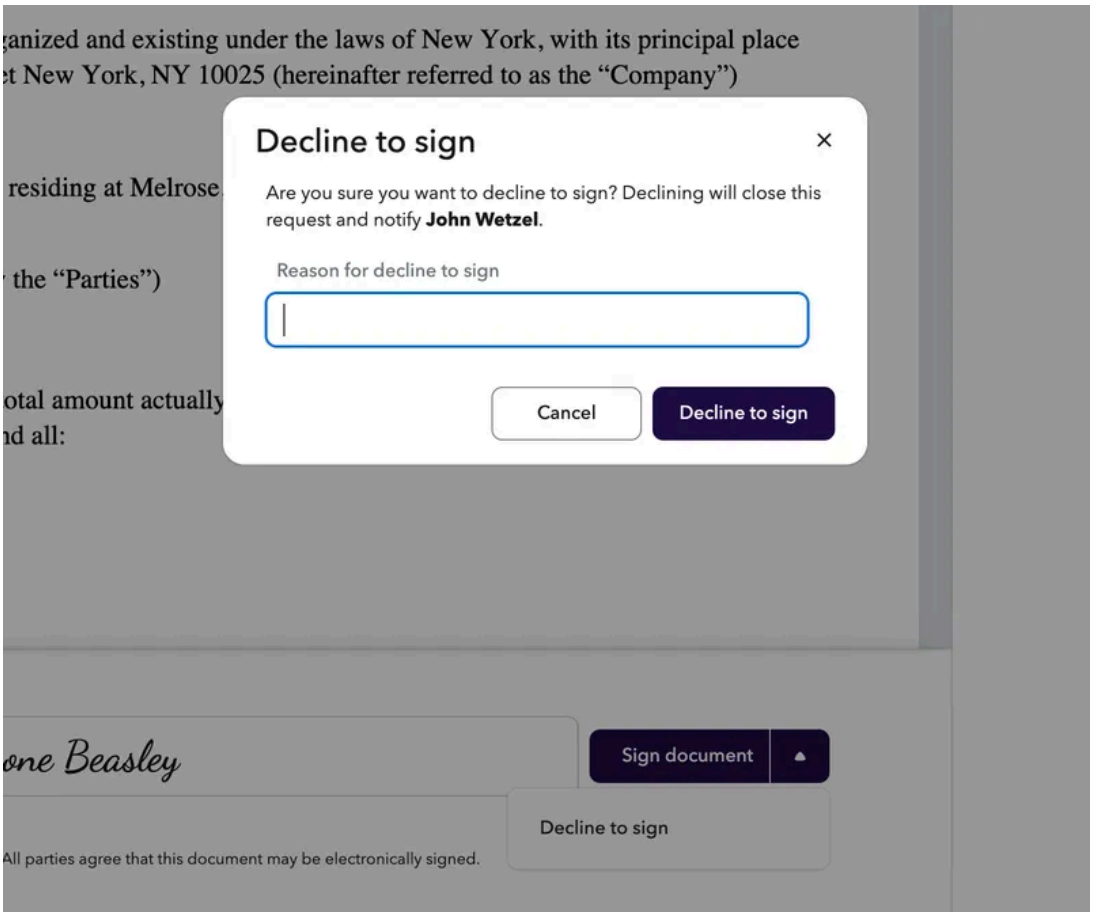
Declining to sign

If there is something incorrect about the document, like a misspelling of a name or incorrect details, you have the option to **Decline to sign** the document.

Declining to sign will cancel the signature request and notify the person who requested the signature from you with the reason that you provide.

To decline to sign a document:

1. Click the **Review and Sign** button to view the document.
2. Review the document.
3. Click the next to **Sign Document**, then select **Decline to sign.**
4. In the confirmation dialog, add a reason for declining to sign the document then select **Decline to sign**.
5. The person who requested your signature will then be notified.



Viewing your signed document

There are several ways that you can view your signed document:

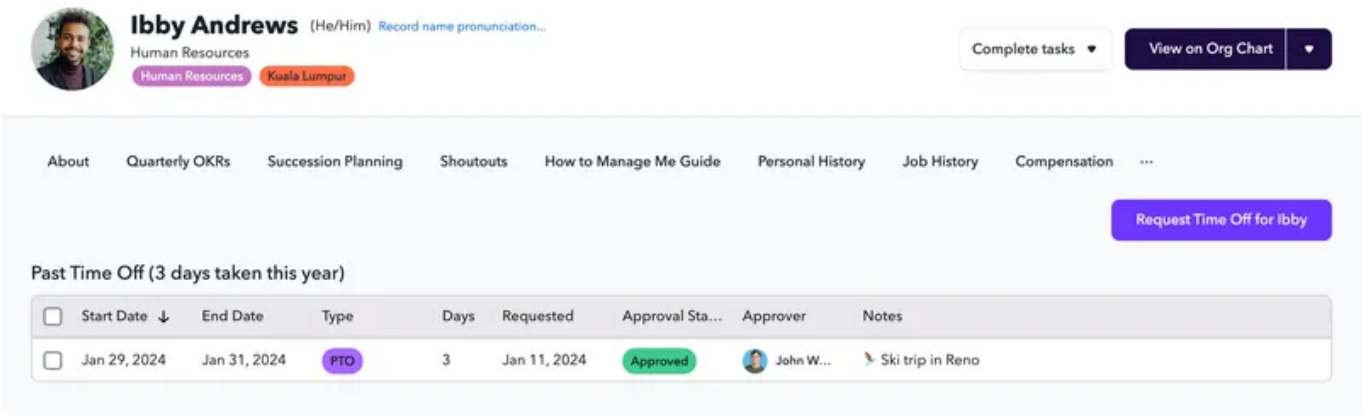
1. **Email —** A copy is emailed to you immediately after you sign a document.
   If you need to search your inbox, use the following details:
   1. Subject: **Signature Completed: {Document Name}**
   2. Sender: **ChartHop** `<no-reply@charthop.com>`
2. **ChartHop Profile —** If you signed a document about yourself, you can find it under **My Profile > Files** tab of your ChartHop profile. If you signed a document about someone else, you can navigate to the Files tab on their profile to see the document.

To view more information about signatures, you can read: **About ChartHop Signatures**

3.4. Time off for employees

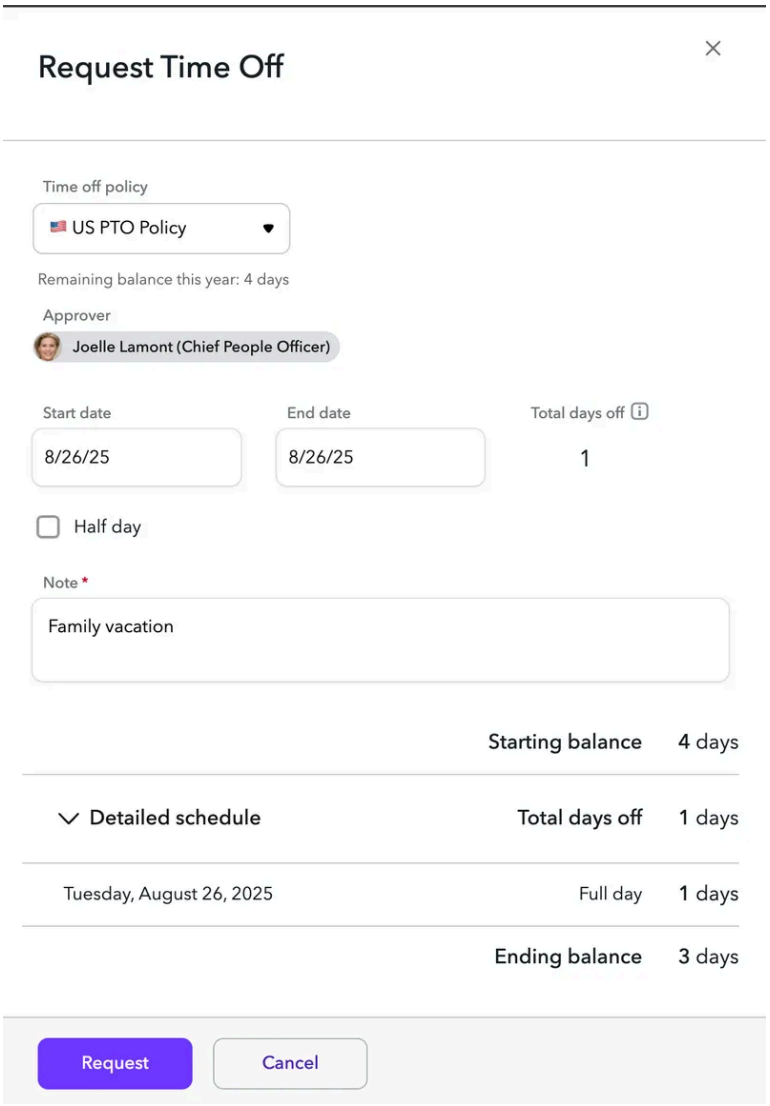
Time Off Policies

ChartHop current supports **unlimited** and **upfront balances** for time off.



Request time off

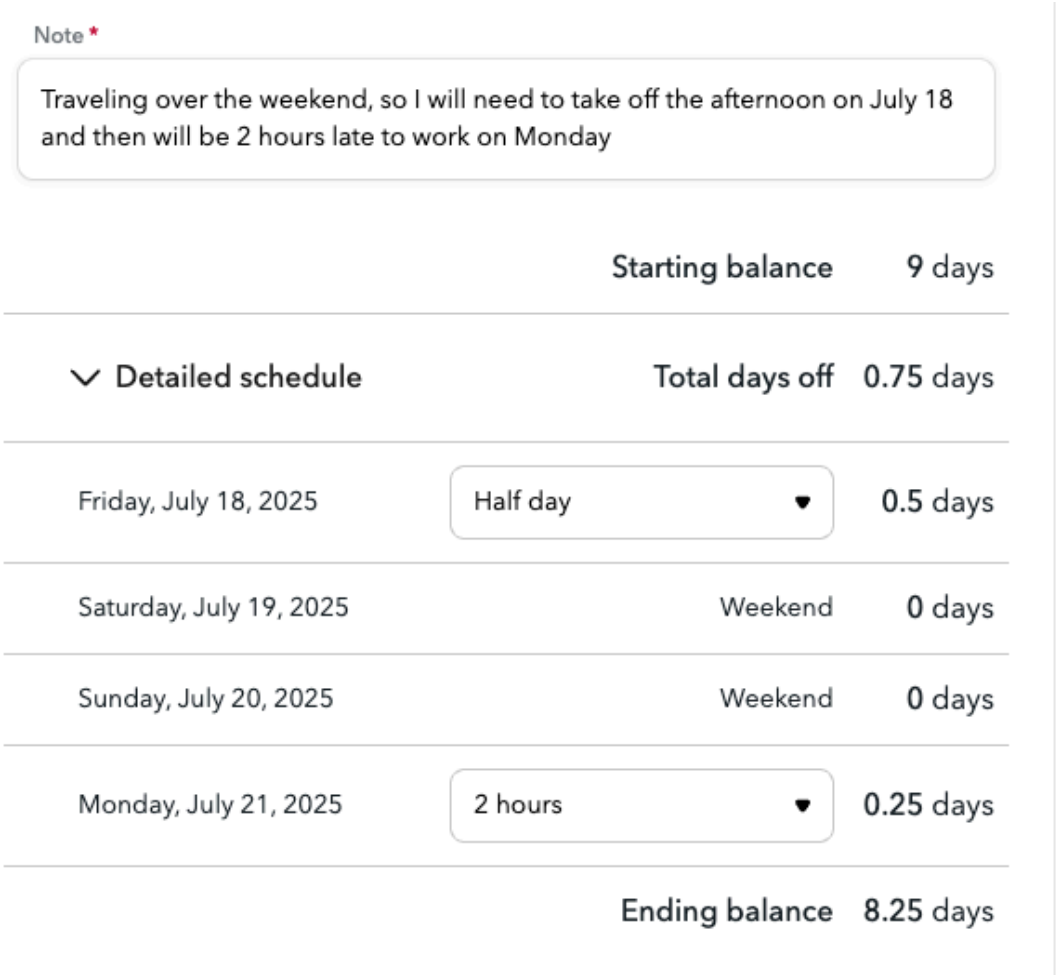
You are able to add request time off via your ChartHop profile. The ChartHop administrators at your company have configured the policies that apply to you. Your request will be sent to to the proper person for approval usually it will be your manager.



To request time off:

1. From the left sidebar, select **My Profile**.
2. Go to the **Time off** tab.
3. Click **Request time off.**
4. Complete the time off request form
    1. Select the **Time off policy** to request from
    2. Set the **Start Date** and **End Date.**
        1. If allowed by the policies, you may select a half or partial day.
    3. Add a **Note**
5. Your request will be sent to the listed approver and you will receive a notification when the request has been approved.

If allowed in your policy, you may request a partial day off.

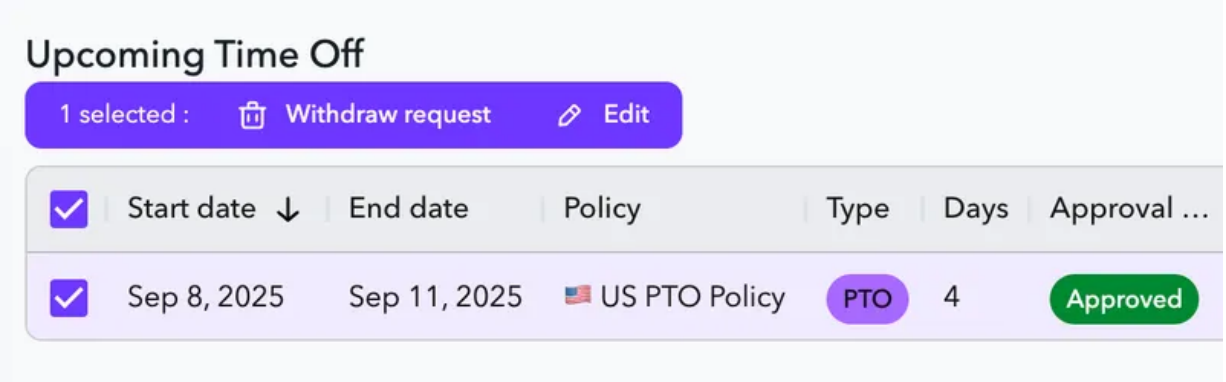


Partial days request example

To request a partial day:

1. Click the > icon to view the **Detailed Schedule**
2. Use the **"Full day" dropdown** to select the amount of time that you would like to take off. The availible options have been selected bt your administartor.
3. You will se the days off reflected in the total to the left.

ChartHop Time Off does have details on your working schedule, so you cannot set that in the request. Please use the **Note** and other work calendar tools to communicate that with you manager.



Edit future time off requests

If you need to make an update to a time off request that is in the future, you may do so. After you edit the request, the request will be sent for re-approval. You are not able to edit time off that is in the past.

To edit a future time off request from the profile:

1. From the left sidebar, select **My Profile**.
2. Navigate to the **Time off** tab
3. Locate the **Upcoming Time Off** and select the request that you would like to edit.
4. Update the policy, start date, end date or note. Then click, **save**.
5. Your request will be sent for re-approval.

Approve or reject a time off request

As a manager, you will receive time off requests to approve or reject for your direct reports.

You can approve or reject via the ChartHop Slack app or from the time off profile tab.

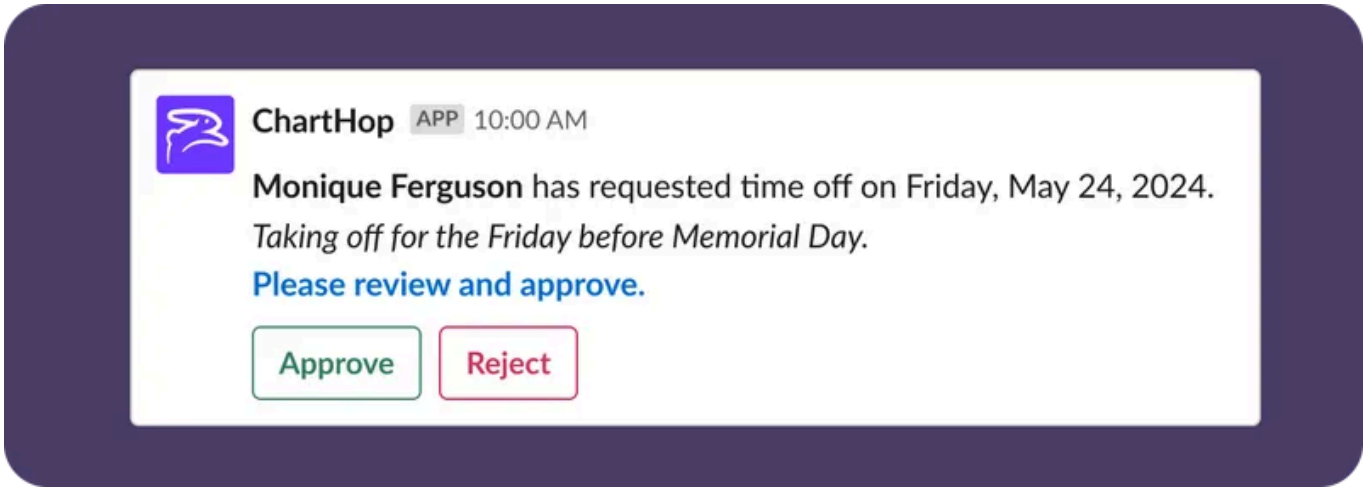
To approve or reject a time off request from the profile:

1. From the left sidebar, select **My Profile**.
2. Go to the **Time off** tab
3. Select the request that you would like to approve or reject using the checkbox on the left of the table.
4. Click **Approve** in the actions buttons at the top of the table
5. Add an approval note and click **Approve** or **Reject** to submit the approval.

Approve or reject a time off from Slack

If your organization has the **ChartHop Slack App** installed, you will receive PTO approval requests over Slack.

When an employee submits a request, as an approver, you will receive a message that looks like this:

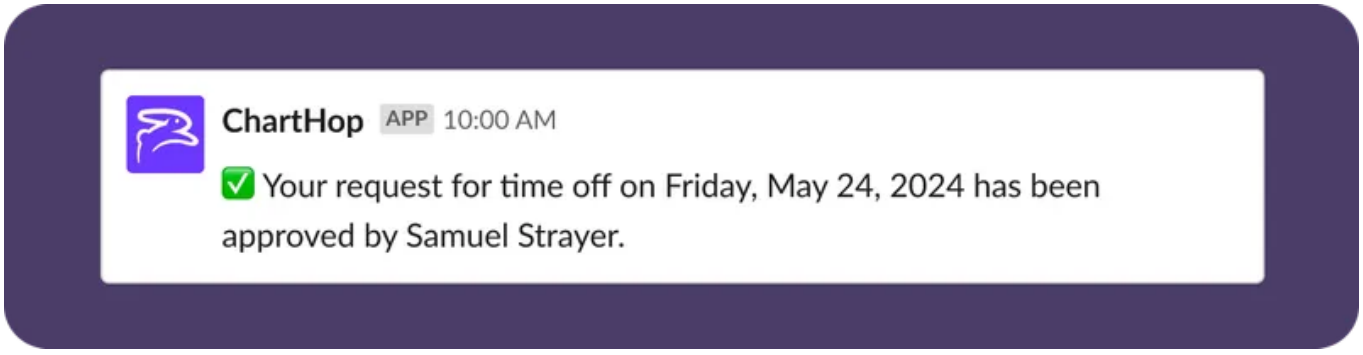


Click the **Approve** button to approve the request.

You will then see a confirmation message:



The person who requested the time off will also receive a confirmation of the approval in Slack.



Cancel or delete a time off request

To delete a time off request:

1. Go to your profile
2. Select the **Time off** tab
3. Select the request that you would like to delete using the checkbox on the left of the table.
4. Click **Delete** in the actions buttons at the top of the table
5. Type DELETE and confirm the deletion of the time off request.

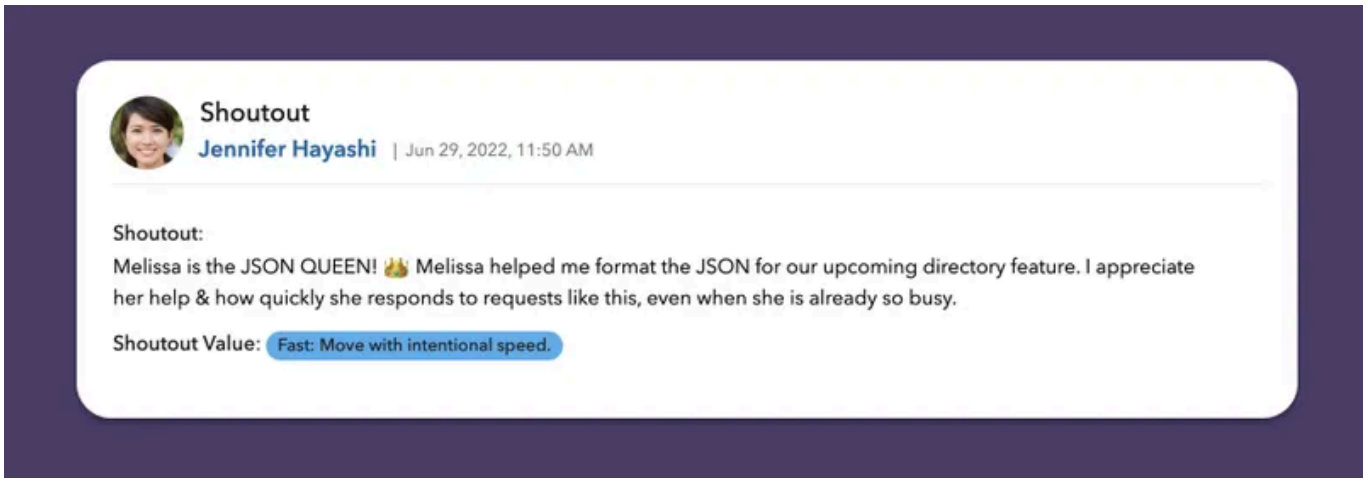
3.5. Give a Shoutout

You can use *Shoutouts* to recognize teammates across your organization when they go above and beyond. Giving a shoutout is a great way to show recognition and appreciation to the people that you work with.

Give someone a shoutout

When you submit a shoutout, you write up a quick paragraph and post it to your teammate's employee profile. The shoutout displays on their employee profile and is visible to anyone who views their profile.

> When your organization is integrated with Slack, shoutouts are also automatically posted in a public channel for your entire organization to see.



To give someone a shoutout:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you want to view.
3. In the employee's profile summary, select **View profile**.
4. Choose **Shoutout** from the **Complete tasks** dropdown.
5. Use the **Shoutout** dialog to enter the text you'd like to share with the employee.
6. Select **Submit**. The shoutout displays on the Shoutout tab of the employee's profile.

View your shoutouts

You can view your shoutouts from the employee profile page.

To view shoutouts:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you want to view.
3. In the employee's profile summary, select **View profile**.
4. Select the **Shoutout** tab to view the shoutouts others have given to you.

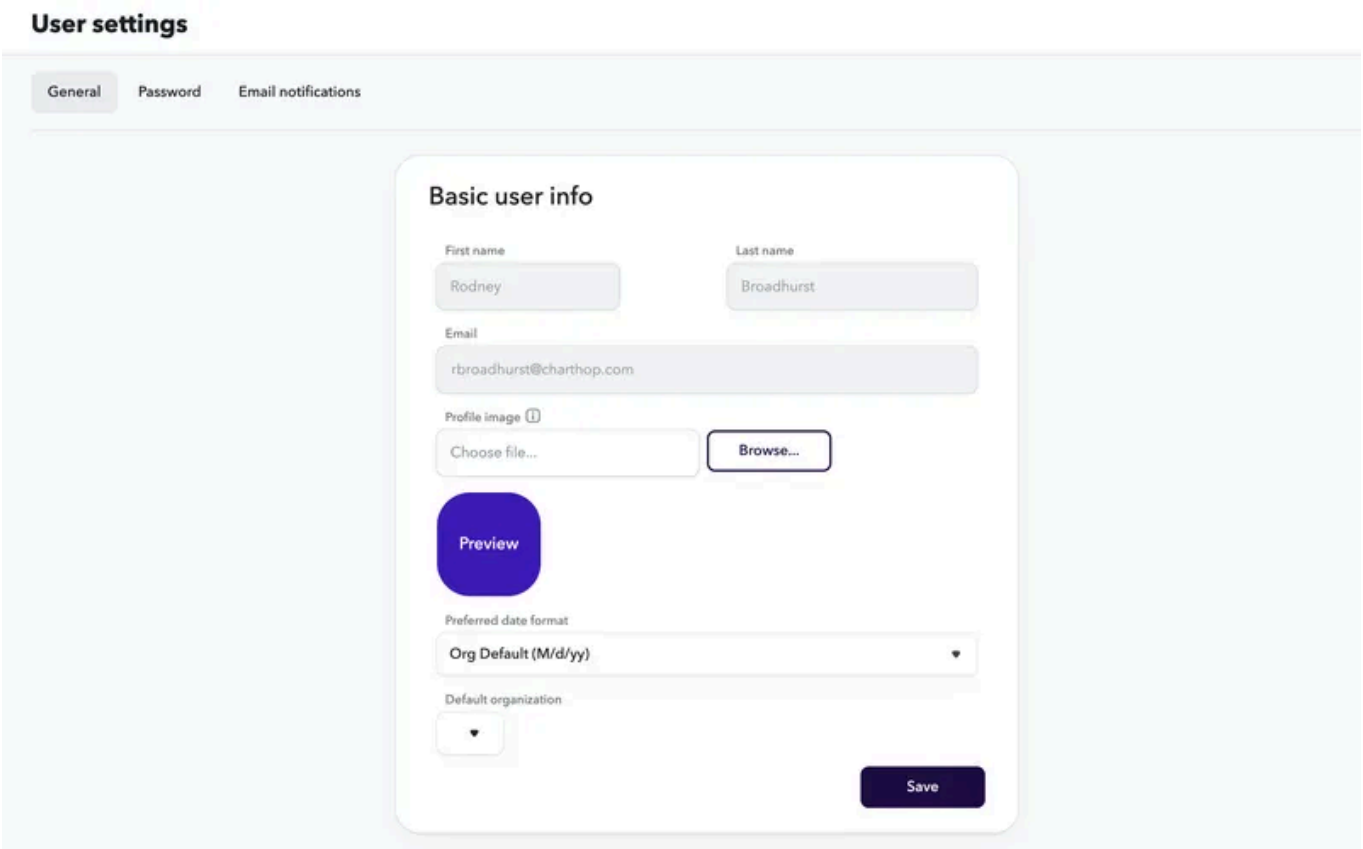
> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

3.6. Edit your user settings

On the **User settings** page, you can complete specific tasks, such as updating your user profile image and changing your password.

To access user settings:

1. Select your profile picture from the top utility bar.
2. Select **User settings**.



Update your user profile image

Your user profile image is used whenever you make changes in ChartHop as a user (for example, when entering comments or changes in a scenario or review). The user profile image always displays in the top utility bar.

> It is not recommended to change the user profile image unless you are a super-user with access to multiple ChartHop accounts. If you do not change this image, your user profile image will be the same as your main org profile image.

To update your user profile picture:

1. From the top utility bar, select your profile image.
2. Select **User settings**.
3. On the **General** tab, navigate to the **Profile image** field.
4. Select **Browse** and select an image file to upload.
    - You can upload an image in PNG or JPG format.
    - We recommend an image size of 200×200 or 100×100 pixels.
5. Once you're done uploading your new profile picture, select **Save**.

> The user profile image is different from the org profile image that displays on your employee profile and throughout ChartHop. **Learn more.**

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

3.6.1. Change your password

You can change your ChartHop password from the **User settings** page only when your organization does not have single sign-on enabled.

If your organization has single sign-on enabled, that means you are using another set of existing credentials to sign in to ChartHop and you cannot change your password from this page. For more information, please reach out to your IT department.

To change your password:

1. From the top utility bar, select your profile image.
2. Select **User settings**.
3. Navigate to the **Password** tab.
4. Select **Change Password**.
5. Enter your old password.
6. Enter your new password.
    - Passwords must be at least 8 characters long.
    - Passwords are case-sensitive.
    - You can use a combination of letters, numbers, and symbols in your password.
7. Re-enter your new password. Both new passwords must match to continue.
8. Select **Change Password**.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

3.7. Sync your calendar with ChartHop

You can create a live calendar that you can then sync to your own Google or Microsoft Outlook calendar.

You can also download the calendar as an .ics file for other calendars. Please note that your calendar will not update automatically as an .ics file.

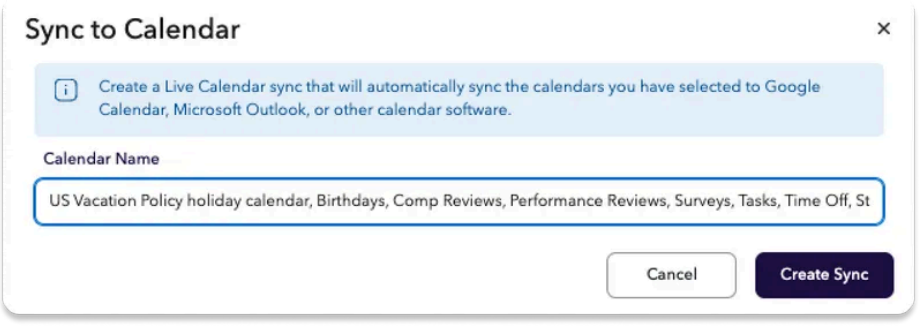
> Calendars visible to employees are customized by your ChartHop administrator.
>
> Depending on how your calendar is customized, some calendars may be unavailable or display under a different name. The **Export** button may also be unavailable. For questions, please contact your ChartHop administrator.

Generating calendar link

You can sync any filtered view of your calendar to external platforms. For example, you might sync a calendar showing only your direct reports' PTO or new hires in your department.

To sync a calendar view:

1. Adjust filters and select the visible calendars you want to include
2. Once ready, click the download button and select “sync calendar”
3. Confirm the calendars listed are the ones you want synced
4. Click “create sync” a live query link for syncing with Google or Outlook calendars, or create an ICS file for Apple and other calendar applications.



Add calendars with URL

Google Calendar

Outlook Calendar

Apple Calendar

Update synced calendars

You can delete synced calendars directly from your Google, Outlook, or Apple account. Once a link is generated and synced with a calendar, it can no longer be accessed or modified in ChartHop. Re-syncing calendars from ChartHop will add new data without replacing existing syncs.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

4. Implementing ChartHop

ChartHop implementation overview

Get an overview of the tasks you'll do to set up ChartHop.

Creating your ChartHop org

Learn how to create your organization in ChartHop.

Configuring your Org settings

Customize the ChartHop settings for your organization.

Inviting users and setting permissions

Assign access roles and invite employees to use ChartHop.

Permissions and security

Review the different access roles you can grant to users.

Creating and managing groups

Add department, team, and location information.

Integrations and bundles

View our list of integration apps and bundle quickstarts.

4.1. ChartHop implementation overview

Before getting started, you will need to set up your ChartHop organization. To set up your organization, you can follow the list of sections below.

Setting up your organization in ChartHop

With all ChartHop packages, the best way to get started is to integrate your data from your payroll system into ChartHop. This keeps your org chart up to date and quickly allows you to see a visual of your organization.

ChartHop allows you to integrate your payroll system in two ways. You can either use an app included with ChartHop or manually import data from your payroll system.

Using a ChartHop payroll app

ChartHop payroll apps sync your payroll system data into ChartHop on a daily basis once you have configured them. This ensures that your ChartHop organization is always up to date and automates the setup process.

Payroll system data syncs are highly recommended, as they are very complete and provide additional benefits such as the ability to capture the historical data of your organization and track its growth over time. **Learn more**.

> ChartHop Basic customers can sync from only one payroll system. If you don't see a synchronization app listed for your payroll system, you will need to manually import your payroll system data from a spreadsheet. **Learn more**.

Importing payroll system data from a spreadsheet

If your payroll system isn't supported by a ChartHop app, you'll need to export your data from your payroll system and import it into ChartHop. After you import your organization's data, you can either manually make changes in ChartHop and your payroll system to keep both up to date or perform a spreadsheet upload from your payroll system on a regular basis depending on how much your org is changing.

Spreadsheet data imports are a perfect substitute if you do not have an existing payroll system integration to sync, or if you are looking for a simpler data implementation. **Learn more**.

Configuring Org settings

After importing your data, you can further customize your organization's settings such as establishing your urls, uploading logos, creating welcome emails, and more. **Learn more**.

Adding groups

If you did not already add groups in your initial data import, you can fully capture the structure of your organization by manually adding information in Groups. **Learn more**.

With your departments, teams, locations, and other group data configured, you will be able to make full use of ChartHop's various visualization features including:

- **Org Chart**
- **Map**
- **Data Sheet**
- **Employee Profiles**

Inviting users

After you establish your organization's initial data, settings, and groups, you may then want to begin inviting new users to join your organization either manually, or by using a custom template. **Learn more**.

Setting up permissions and security

If you are an HR professional looking to prepare a rollout plan using ChartHop, you can assign roles to your users, manage user permissions, and protect your sensitive data. **Learn more**.

Integrating apps and bundles

ChartHop supports an entire marketplace of compatible apps and bundles with which you can integrate into your organization. **Learn more**.

Common implementation challenges

Most implementations go smoothly, but there are a few common issues worth knowing about before you get started. Here's what to watch for and how to address them.

Duplicate employee records

Duplicate records can appear when data is imported from multiple sources — for example, if the same person exists in both a payroll integration and a manual spreadsheet upload. To avoid this:

- Complete your payroll integration or spreadsheet import first before making manual edits in ChartHop.
- If duplicates do appear, use the Data Sheet to identify and remove the extra records before inviting users.

Missing or inconsistent location data

Location data powers several ChartHop features, including the Map view, location-based compensation band multipliers, and geographic filtering in reports. If location data is missing or formatted inconsistently (for example, "New York" vs. "New York, NY" vs. "NYC"), these features won't work as expected.

- Ensure your payroll system exports a consistent location format before importing.
- After import, review your Groups > Locations list to confirm all locations resolved correctly.

Role and permission misconfigurations

ChartHop's role system is flexible but can be easy to misconfigure — for example, giving too many users the Owner role, or not correctly restricting access to sensitive compensation data.

- We recommend starting with a small set of Owners (typically just your People Ops admins) and expanding access gradually.
- Review the **roles and permissions guide** carefully before your broader rollout to ensure sensitive fields are protected.

Group structure not matching your org

If your department or team structure in ChartHop doesn't match how your organization actually operates, reports and filters will be unreliable. This often happens when group names from a payroll import don't align with how your team uses them day-to-day.

- After your initial import, walk through your Groups settings and rename or consolidate any groups that don't reflect your real structure.
- Consider mapping out your desired group structure before the import to make cleanup faster.

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

4.2. Getting Data into ChartHop

What Are My Options?

One of ChartHop's greatest strengths? Bringing all your people data into one clear, unified view, no matter where it lives today.
But the question we hear all the time is: ***how?***

Well, we're here to help! There are multiple ways to get your data into ChartHop, whether you're looking for a fully automated sync or a quick one-time upload.

Not sure where to begin?
This guide will walk you through your options (and yes, you can use more than one!).

Still feeling stuck?
Don't worry, we'll help you choose the best setup for your needs.

1. Out-of-the-Box Integrations

Best for: Teams using popular systems like BambooHR, Workday, ADP, or Paylocity. For our full list of OOTB integrations, click here.
How it works: ChartHop connects directly to many well-known HR systems and pulls in your data every day, automatically. No coding needed, just an API key.
Why customers like it: It's easy to set up and keeps your data fresh without any manual work.

✅ Fully automated (daily sync)
✅ No intensive technical work required
✅ Keeps your data up-to-date

⚠️ Your sync may not pull over historical data, and may require an additional upload

2. Custom API Integration

Best for: Companies with teams who can help set up a custom sync to send data to ChartHop
How it works: Your developers can build a custom connection that sends your data to

ChartHop automatically. You control what's sent and how often.
Why customers like it: Great for teams with custom tools or special data needs.

✅ Total flexibility
✅ Works with any system
⚠️ Requires developer help

3. SFTP File Transfer

Best for: Companies that regularly export data into files or don't have the option for a custom app but still want a more automated sync.

How it works: You send data files (like spreadsheets) to a secure folder. This folder can be hosted by ChartHop or by your team. ChartHop then reads the file and updates your data.
Why customers like it: It's automated and secure, and doesn't require building a tech integration.

✅ Secure and reliable
✅ ChartHop or your team can host the folder
⚠️ You need to generate and send updated files

4. Google Sheets Integration

Best for: Teams that manage HR data in Google Sheets or want to sync in custom data.
How it works: ChartHop connects to a shared Google Sheet and pulls in data regularly.
Why customers like it: It's easy to use and update, without needing any technical setup by your team. Our team will work with you to ensure all fields are mapped over correctly.

✅ Easy data transfer from one familiar interface to another (aka ChartHop!)
✅ Easy to update in a familiar format
⚠️ Best for smaller, less complex data sets

5. Manual CSV Upload

Best for: Initial Org Uploads, historical uploads, one-time uploads or quick updates
How it works: You can upload your data using a spreadsheet (CSV format) right inside ChartHop. We provide templates to make it easy.
Why customers like it: Simple and fast, especially if you just want to get started.

✅ Quick setup
✅ No technical skills needed
⚠️ You'll need to upload again if the data changes

6. Third-Party API Connectivity

Best for: Companies using supported payroll, benefits, or HR systems (200+ apps supported)
How it works: ChartHop connects to third-party tools that already integrate with a wide range of platforms. What data comes in (and how often) depends on the app you connect.
Why customers like it: Easy to get started and access multiple systems in one place to get that data into ChartHop.

✅ Connect to 200+ systems
✅ No need to build anything
⚠️ Sync timing and data fields vary depending on the app

How to Choose

If you…	Try this option:
Use a well-known HR system we connect to	Out-of-the-box integration
Have developers and custom systems	Custom API integration
Export files regularly, want automation and there is no OOTB sync	SFTP file transfer
Manage your data in Google Sheets or want to stack additional data on top of your existing people data	Google Sheets integration
Want to get started quickly or need a speedy one-time upload/update	Manual CSV upload
Use a supported payroll or HR system that is not an OOTB option	Third-party integration

Glossary

 CSV – A spreadsheet file (like Excel) used to upload data
 SFTP – A secure way to send files from one system to another
 API – A way for two systems to talk to each other and share data automatically
 Integration – A connection between systems that lets data flow from one system to another

4.3. Creating your ChartHop org

Your first step to using ChartHop is to create your ChartHop organization using your existing employee data. You can bring in existing employee data as well as any open reqs from your hiring plan.

You can do this in two ways:

- Use a ChartHop app to sync data from your payroll system or applicant tracking system to ChartHop. **Learn more.**
- Import a spreadsheet of your employee data. **Learn more.**

> ChartHop Basic customers have limited access to ChartHop integrations. If your payroll system isn't supported by ChartHop Basic, you can import your employee data from a spreadsheet. **Learn more.**

> **Roles**: Owner | Technical owner

4.3.1. Syncing your payroll system

The easiest way to get started with ChartHop is to sync your employee payroll data with an app. We use this data to build your current org structure, along with a historical one through former employees and their start and end dates.

Once you've installed an app, ChartHop syncs with your payroll system daily and keeps your ChartHop organization data current.

ChartHop's apps make it easier to keep your data up to date across platforms by automating payroll data retrieval from your chosen provider. **Learn more.**

Supported payroll system integrations

The following payroll apps are available to ChartHop Basic, ChartHop Headcount Planning, ChartHop Compensation Reviews, ChartHop Performance, and ChartHop Engagement customers:

- **BambooHR**
- **Gusto**
- **Justworks**
- **Namely**
- **Sapling Onboarding from Kallidus**
- **Zenefits**

The following payroll apps are only available to ChartHop Headcount Planning, ChartHop Compensation Reviews, ChartHop Performance, and ChartHop Engagement customers:

- **ADP**
- **Humaans**
- **Paylocity**
- **Rippling**
- **Sequoia One**
- **SuccessFactors**
- **TriNet**

- Ultipro
- Workday

> If your payroll system is not listed above (or, if you are a ChartHop Basic customer with a different system than those supported by Basic), you must manually import your payroll from a spreadsheet. **Learn more.**

How payroll integration apps work

Payroll apps run *one way* from the payroll provider to ChartHop, so the payroll provider remains the source of truth on compensation and reporting structure while ChartHop remains updated with the latest payroll data.

ChartHop is designed to bring together multiple systems of record in one location. When you connect your payroll system with ChartHop, only employees in your payroll system are affected. If you have added other employees directly to ChartHop, the sync from the payroll system ignores those employees and does not update them.

You can sync data from multiple payroll providers and also add employees or contractors directly to ChartHop. Start by installing the payroll app for your primary payroll provider and fill in additional data as appropriate.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> Roles: Owner | Technical owner

4.3.2. Syncing your hiring plan

ChartHop keeps track of both open roles and people. Use ChartHop as a single, org-wide source of truth for your hiring plan.

With ChartHop apps, you can sync your hiring plan from one of the following applicant tracking systems (ATS):

- **Greenhouse**
- **Lever**
- **Jobvite**

> If you haven't set up an integration with your ATS or are not using one, you can import your hiring plan via a spreadsheet. **Learn more.**

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles**: Owner | Technical owner

4.3.3. Import payroll data for ChartHop Basic

If you have ChartHop Basic and need to import payroll data from a system that is not supported by a ChartHop Basic app, you can export your payroll to a spreadsheet and then import the spreadsheet to ChartHop. Ensure that the data in your file conforms to ChartHop's **formatting requirements**.

Exporting data from a payroll system

When you export payroll data from your system, the spreadsheet file should:

- Be in CSV or XLSX format.
- Be UTF-8 encoded.
- Have fewer than 1000 records.

At a minimum, the file should contain the following columns:

- **Work email** (As the first column)
- **First name**
- **Last name**
- **Job title**
- **Manager**
- **Start date**

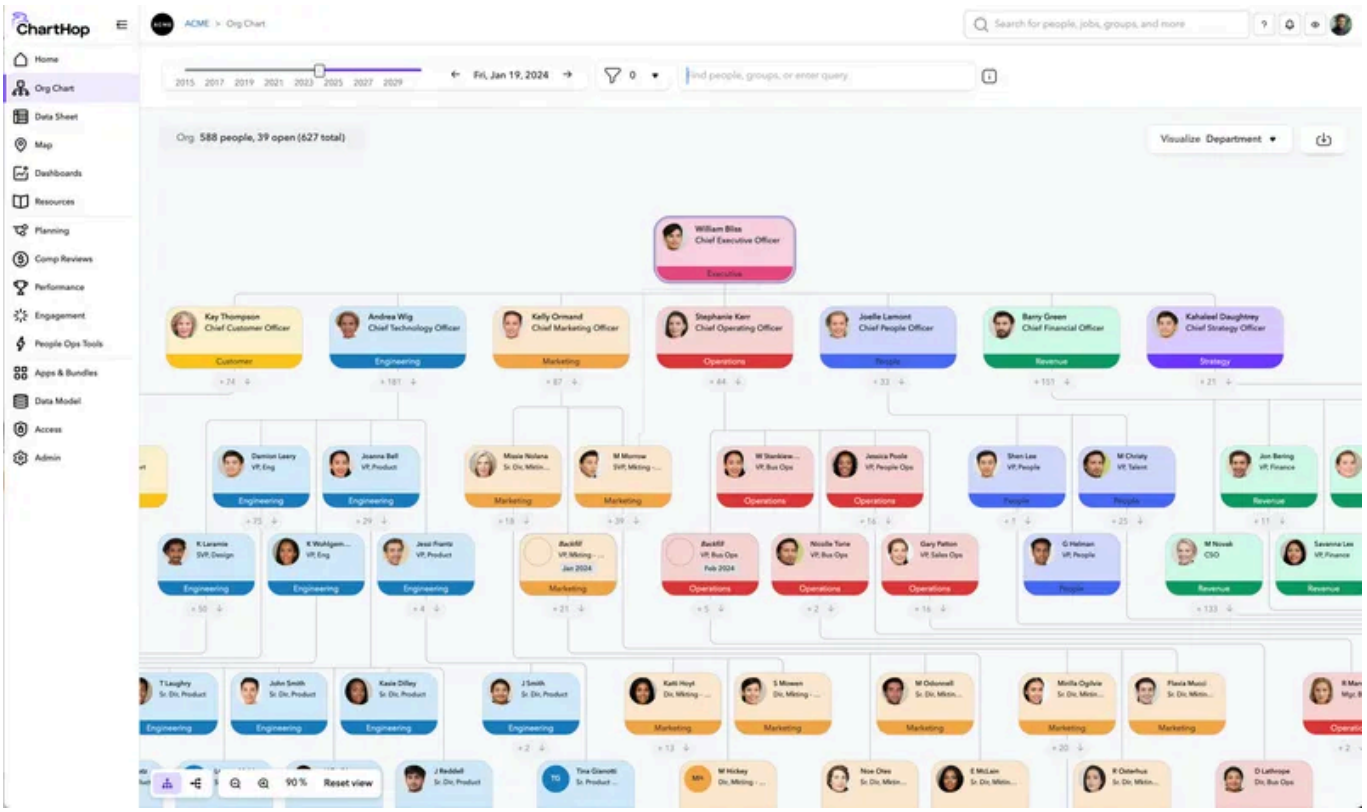
View and download an example spreadsheet.

> Typically, we recommend you use work email addresses to identify employees when you import. However, you can use **System ID** as your first column and then list payroll system identifiers such as `ADP ID`, `Bamboo ID`, or `Job ID` in that column. If you do so, ensure that you provide a corresponding identifier for the person's manager (for example, if the first column is `ADP ID`, provide the manager's `ADP ID` in the **Manager** column).

Import your data to ChartHop

To import your data to ChartHop, complete the following steps:

1. On ChartHop's main screen, under **Upload a spreadsheet**, select **Excel** or **CSV**.
    1. OR if you have already implemented some data
        1. On the left sidebar, select **Admin**.
        2. From the sub-menu, select **Import Spreadsheet Data**.
2. Under **Upload your spreadsheet**, drag and drop the file to import.
3. Select **Next step**.
   ChartHop attempts to match each column with a ChartHop field. For example, a column titled `fname` is identified as `first name`.
4. If necessary, under **Column in your spreadsheet**, match any unmatched columns (highlighted in red) with the appropriate ChartHop field. Note that selecting **None of these** for a required field will generate an error.
5. Under **Date format**, select the date format for dates in the file.
6. Select **Looks good!** to proceed to the next section.
7. Under **Add required info and tidy up your data**, fix any errors (highlighted in red), such as improperly formatted dates or email addresses. See the following section for a reference of common errors.
8. Select **Looks good!** to proceed to the next section.
9. Under **Help us understand your org structure**, select the head(s) of your organization.
10. If necessary, under **Identify managers**, select any missing managers (highlighted in red).
11. Click **Looks good!** to start creating your ChartHop organization.
    A progress bar is displayed, but you can close the window without interrupting org creation. You receive an email when your ChartHop organization is created.



Importing Images

We recommend connecting the **Slack** app or your payroll/HRIS to import images, but if needed, you may upload them via a spreadsheet:

You can add profile pictures for your employees by uploading image links to the picture you want to associate with the employee. Add these links to the **Image** column. ChartHop will resize images and add them to individual's profiles. When uploading images, note the following:

- You should host images on a publicly available server with no login required.
- You can upload images with the .jpeg, .jpg, .png, and .gif file types.

Common column errors

The following table contains column errors you may encounter while setting up your ChartHop organization:

Error	How to resolve...
Invalid email format	Use a valid email format for **Work email** and **Manager**, such as `steven.jones@charthop.com`.
Invalid date format	Use a valid date format for **Start date** that matches the one you selected, such as `m/d/yyyy`.
Email addresses are not unique	Ensure that each person has a unique email address.
Missing required field	Include **Work email**, **First name**, **Last name**, **Job title**, and **Start date** for each person.

Basic | HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

Roles: Owner

4.3.3.1. Clear data in ChartHop Basic

When starting out with ChartHop Basic, you can import sample data to help you experiment with ChartHop's features.

Importing sample data allows you to practice the process and ensure you are importing the data as you need it and including all of the information you need to build your org chart and initial employee roster.

> You should not clear data unless you intend to start your initial import over or want to delete all of the data from your initial import. If you wish to change your data, you can do so manually within ChartHop or import a spreadsheet to update your current data. **Learn more.**

You can clear this sample data or any initial import and choose to start over.

When you clear data, the following happens:

- All data associated with employees is deleted.
- You do not need to re-invite users to your organization or re-assign roles. All user information remains in ChartHop.
- The initial import tile is once again available on your Home page.

To clear initial import data:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Clear Data**.
3. Select **Clear data.**

> **Basic** | HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

> **Roles**: Owner

4.3.4. Importing files & documents

> **Modules: HRIS** | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

HRIS customer can work with the ChartHop team to bulk import files and documents during an HRIS migration. Contact the ChartHop team to initate this process. Use this guide to help you prepare and plan for a file document migration.

Understanding File Organization in ChartHop

Most HRIS systems or File management systems (Google Drive, Dropbox, Box) uses a file directory system to store files. A file directory system is where files are stored within folders. Sometimes those folders are standardized across employees and sometimes they can be created on a one off basis.

ChartHop does **not** use a file directory system to store files. Instead files are stored in two ways:

1. **Fields** organized by **Categories** (preferred)
2. A File directly linked to a person with a specified **Sensitivity level.**

There are several advantages to using **Fields** instead of a file directory. Here are a few examples to demonstrate how:

	Field-based (ChartHop)	Folder-based (Other Systems)
Data Auditing - "Which current employees are missing an offer letter in their file?"	Can quickly add the I-9 Field to the **Data Sheet** with a filter: Has the file: `fileName:*` Does not have the file: `!fileName:*` or just **Ask ChartHop** to create it for you.	Need to check every folder individually or rely on file naming.
Data Access - "We want to hide all promotion letters from employees until after reviews and them make them accessible"	Can update the **Sensitivity level** of the "Promotion Letter 2024 field" from Manager Only to Manager Shared when ready	Unable to change file access across org.
Organization - "We want to reorganize our files to be organized by file type rather than by year."	Can update **Categories** and **Field** names at will	Stuck in an organization strucutre that can't be changed without a ton of manual effort.

Preparing for a file migration

In order to import files into ChartHop in bulk, you will need the following:

1. A way to extract your files from your existing system. This may be via a download or where available an API.
    1. If using folders - Ensure that you can have a unique identifier like email, employee ID or HRIS ID in the folder name that can be used to match the folder to a person in ChartHop.
2. Understand how your files are organized and how you would like to translate that structure to **ChartHop's Document and File Organization Structure**
3. Understand how is access currently managed for your existing files and how you would like to translate that to access within ChartHop.

/vide

Organization Best Practice

1. **Create a fields for every “File type” or “Document type”**
    1. Previously these may have been represented in folders or in the file name.
    2. Use a single field for the general file type then upload multiple files to that field over time
        1. ✅ Commission Agreement
        2. ❌ Commission Agreement Q1 FY25
    3. Consider any you will need to setup. At the end of the workflow such as a signature request, the file will be stored in a field, so plan accordingly.
2. **Place all files in Field Categories**
    1. You may be used to a file structure, so Field Categories help you recreate that organization
    2. Examples include:
        1. Onboarding documents
        2. Policy Acknowledgements
        3. Work Authorization
        4. Performance
        5. Promotion letters
        6. *Note that the file category will be visible to all viewers of the file*
3. **Use “Miscellaneous” as a fallback**
    1. Files that are not linked to a field but only liked to a person are listed as “Miscellaneous”
    2. These should be used only as needed

File Workflows

If you are generating or storing files with any automations or integrations with you current system, consider how you will transfer those over to ChartHop. The tools available to you

are:

1. **Signatures**
2. **Send documents for signatures via Actions**
3. **Form responses workflows** - Create PDF from a submitted folders

File Security

All customer data including files are stored at rest using AES 256-bit encryption and in transit using TLS 1.2+.

4.3.5. Syncing data via an SFTP server

ChartHop provides an SFTP sync app that connects to your SFTP server, retrieves a CSV file, and uploads the data to ChartHop.

When you set up the app, you configure the address and credentials for your SFTP server so that ChartHop can connect to it. It runs daily at 9 a.m. Eastern Time, similar to ChartHop's payroll apps.

You can only have one CSV in your upload path at one time. To upload additional data, you need to replace the file on your SFTP server with one of the same name. If the same CSV file exists on the server, it will be uploaded a second time. When this happens, it overwrites any data you've changed in ChartHop that was included in your CSV via the SFTP.

You can configure the SFTP app to ignore files older than the time period you set. For example, you can set it to ignore any files older than two days.

> ChartHop supports:
>
> - Servers using best-practice encryption algorithms. Known insecure algorithms including SHA1 or MD5 are NOT supported.
> - Key algorithms, including: `ssh-ed25519,` `ecdsa-sha2-nistp256`, `ecdsa-sha2-nistp384,` `ecdsa-sha2-nistp521`, `rsa-sha2-512`, and `rsa-sha2-256`.
> - SFTP protocol versions up to and including 3.

Formatting your CSV

The CSV format is the same as when manually uploading a spreadsheet with the spreadsheet importer. **Learn more.**

> You can use a CSV file or an XLSX file.

The column headings in your spreadsheet should match the ChartHop field names to which you are importing. You'll need to ensure that your column headers use the appropriate ChartHop field names to ensure a proper upload.

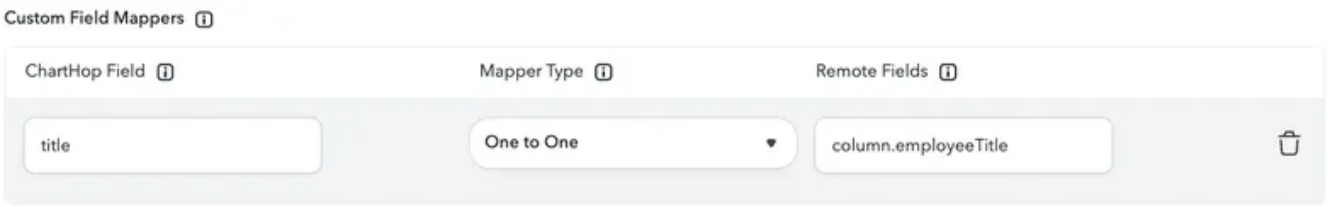
Learn more about built-in fields.

Mapping column names to ChartHop fields

If you are automating this process and need to keep the header names from the system you are exporting; you can add a one-to-one field mapping of your exported headers to the appropriate ChartHop field.

For example, if your system exports titles to a spreadsheet column named Employee Title instead of Title, you can map that header name to the appropriate ChartHop field instead of changing the name in your spreadsheet.

When mapping column names to ChartHop fields, you need to use the ChartHop code name and preface your spreadsheet column name with the "column." The below example maps data in the spreadsheet column **Employee Title** to the **Title** field in ChartHop.



The code name for the ChartHop field is title, while the name of the column in the spreadsheet is prefaced with *column.* Use camel case to indicate spaces in your column names. For example, *column.employeeTitle* represents a column header called "Employee Title".

Install the SFTP sync app

To install the SFTP app:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps** if not already pre-selected.
3. Select the second tab **Available apps**
4. Find the **SFTP Sync** app in the list of available apps.
5. Click **Install** on the far right-hand side of the table.
6. Configure your SFTP sync settings:
    - **Remote Hostname** - Enter the hostname of your SFTP server.
    - **Port** - Enter the port of your SFTP server.

- **Username** - Enter the username that ChartHop will use to log in to your SFTP server.
- **Password** - Enter the password associated with the username you entered.
- **Remote File Path** - Enter the complete path, including filename, of the CSV file you want to upload to ChartHop.

7. Mark the **Run Daily** check box. Remember that the upload syncs daily at 9 a.m. EST.
8. Mark whether or not you want the upload to skip errors. If you mark this option, the upload continues but rows with errors aren't uploaded.
9. Mark **Upsert**. ChartHop recommends enabling this check box so that new people and jobs can be added. When unmarked, the upload can only make changes to existing data.
10. Add an email to which to send notification emails when the upload occurs. If you want to add multiple emails, you must separate them with a comma.
11. Optionally, you can work with your ChartHop representative to add custom fields you want to upload. You can only upload data to fields that already exist in ChartHop.
12. Select **Save Settings**.

Run a one-time sync

You can run a one-time sync from the SFTP app. You can do this even when you have configured an automated sync. An on-demand sync runs as soon as you select the option. When you run a one-time sync, you have the flexibility of syncing your data to a ChartHop scenario or to your primary org.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps** if not already pre-selected.
3. From the Installed apps tab, find the SFTP app and select the gear icon ⚙.
4. Scroll to the bottom of the screen to view the **Sync to primary** and **Sync to Scenario** buttons.
5. Choose one of the following
    - Select **Sync to primary** to sync the current data on your SFTP server to your primary org.
    - Select **Sync to scenario** to sync the current data on your SFTP server to a scenario. You can choose from a list of existing scenarios or choose to create a

new scenario when you sync.

6. Select **Sync**. Once completed, a message indicates that the sync has been completed.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles**: Owner | Technical owner

4.4. Apps & Integrations

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles**: Technical owner | Owner

ChartHop apps let you connect ChartHop to your existing systems so that your data can flow between them. This helps you obtain a full picture of your people data and dynamically visualize your organization in one place.

To access ChartHop apps:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

The following types of ChartHop apps are available:

- Payroll system apps
- Applicant tracking system (ATS) apps
- Equity management system apps
- Financial planning and analysis (FP&A) apps
- Single sign-on (SSO) apps
- Slack integration app

> You can perform custom mapping to ensure your data shows up in the right place. For more information, reach out to ChartHop Support.

Payroll system apps

You can set up your organization in ChartHop through our payroll system apps. After you connect ChartHop to your payroll system or HRIS, changes you make in your payroll system to employee data, such as addresses, job titles, and more, are automatically reflected in ChartHop.

You can use payroll system apps to import employee data such as demographics, contact info, titles, reporting structures, compensation, group membership (departments, teams, locations), and even information like new hires and departures. ChartHop uses all this information to build your org chart and maintain employee data.

ChartHop treats your payroll system as the source of truth for all employee data - if you change anything in ChartHop, it is overwritten during the next data retrieval. **Learn more.**

Applicant tracking system apps

ATS apps let you integrate your hiring plan so you can perform headcount planning within ChartHop and put those plans into practice within your ATS.

Depending on what works best for you and your organization, you can configure how and in which direction your data flows between your ATS and ChartHop.

For example, you can set up ChartHop as the source of truth and database of record. This lets you leverage ChartHop to enter and maintain hiring data so that you can view open roles within the context of your org chart and perform headcount planning and create hiring scenarios. Any information that is changed or updated within ChartHop is sent out to the ATS using event-based syncs so that your ATS is updated immediately.

Or you can select to have your ATS be the source of truth and data is brought over from your ATS into ChartHop in cases where you'd prefer your recruiters stay within your ATS. **Learn more.**

Equity management system apps

Equity management system apps let you bring equity information into ChartHop so that you can have a complete picture of compensation information available when you need it.

Bringing equity data into ChartHop lets you keep track of employee stock grants when evaluating total compensation during compensation planning and reviews in ChartHop. **Learn more.**

Financial planning and analysis (FP&A) apps

These apps help you make your ChartHop data available in FP&A systems for further analysis and forecasting. **Learn more.**

Identity apps

Single sign-on apps allow you to leverage your ChartHop employee data for creating SSO profiles or workspaces. **Learn more.**

Slack integration app

Our Slack integration app allows you to personalize your employee experience within ChartHop.

You have the ability to import employee photos, contact info, and time zone information from Slack into ChartHop as well as DM slack users from their employee profile in ChartHop. These apps help improve communication and make it easier to connect within your organization. **Learn more.**

Workflows

Overview

ChartHop connects to a wide range of HRIS, payroll, and ATS systems — but most organizations run more than one of these tools at a time. Workflows documentation covers how to configure and manage ChartHop when multiple integrations are active simultaneously.

Each integration syncs data into ChartHop independently. When two systems touch overlapping data — employee records, headcount, org structure, compensation — the order of operations, source-of-truth configuration, and sync timing all matter. Getting this right prevents duplicate records, incorrect headcount, and org chart inconsistencies.

This section is organized by integration combination. Each guide covers how the two systems interact inside ChartHop, recommended configuration, and how to troubleshoot issues that only surface when both integrations are running.

When to Use This Section

Use these guides if you are:

- Setting up ChartHop with more than one integration active at the same time
- Troubleshooting data issues that may stem from sync conflicts between two systems
- Onboarding a new integration alongside an existing one and need to understand how they will interact
- Configuring a source of truth for employee records when multiple systems could claim ownership

If you are setting up a single integration in isolation, refer to that integration's standalone documentation instead.

How Workflows Are Structured

Each workflow guide covers:

- **How the integrations interact** — where they share data, where conflicts can arise, and which system should own what
- **Recommended configuration** — sync order, timing, and setup sequence
- **Common issues and troubleshooting** — problems that only occur when both integrations are active

Available Workflow Guides

HRIS + ATS

These guides cover running a payroll or HRIS system alongside an applicant tracking system. The HRIS is typically the source of truth for active employee records; the ATS manages open roles and hire events.

- HiBob + Lever

HRIS + Payroll

These guides cover organizations that use a separate HRIS and payroll system, where compensation data may originate from either source.

- HiBob + ADP
- Workday + ADP

Other Combinations

 Don't see your combination? If you're running two integrations that aren't covered here and experiencing data conflicts, contact support@charthop.com. We can help identify the correct source-of-truth configuration for your setup.

4.4.1.1. HiBob + Lever (Outbound)

HiBob + Lever in ChartHop: Integration Guide

How the two systems interact, where they hand off data, and how to avoid conflicts

HiBob and Lever sync into ChartHop independently, but their data intersects at two critical moments: when a new hire is made, and when a contractor fills (or shouldn't fill) an open headcount slot. Understanding these handoff points is the core of running both integrations correctly.

How the Two Systems Connect

HiBob and Lever don't communicate with each other directly. ChartHop is the connective tissue. Each system writes data into ChartHop on its own schedule, and ChartHop's matching logic determines how records from both systems relate to each other.

There are two join points that matter:

Join Point	HiBob Side	Lever Side	How ChartHop Links Them
Person matching	Employee record, identified by hibobid	Candidate record, identified by email	ChartHop matches the Lever candidate to the HiBob-created person by email address (home email first, then work email)
Job matching	HIRE change synced from HiBob lifecycle history	Open requisition, identified by leverReqId stored on the ChartHop job	When Lever fires a hire webhook, ChartHop looks for an open job with a matching leverReqId and links the hire to it

Everything else each system does (HiBob building the org chart, Lever managing candidate stages) is independent. Conflicts only arise at these two join points.

The New Hire Workflow

When a new hire is confirmed, both HiBob and Lever will create data in ChartHop independently. ChartHop has multi-step matching logic designed to prevent duplicates regardless of which system syncs first.

How ChartHop matches people

When the HiBob sync brings in an employee, ChartHop uses the following matching process:

1. **HiBob ID match:** Looks for an existing person with a matching hibobid contact. This is the primary and most reliable match.
2. **Contact match (unassigned people only):** If no hibobid match is found, it searches people who don't yet have a hibobid contact and compares their existing contacts (email, phone) against the incoming person's contacts.

Both fallback steps only search unassigned people — people who don't have a hibobid contact yet. If a person was already created by another system (e.g., Lever) and is assigned to a job, they will still be found by the contact fallback as long as the email address matches.

When Lever fires a hire webhook, it matches candidates by email address (home email, then work email) before creating a new person.

In most cases, this means the order doesn't matter — whichever system syncs second will find the person created by the first system via email matching.

When duplicates can still occur

Duplicates are rare but can happen when all of the following are true:

- The person created by the first system is already assigned to a job (which removes them from the unassigned matching pool)
- The email addresses differ between Lever and HiBob (e.g., personal email in Lever vs. work email in HiBob)

The most common scenario: Lever hires a candidate using their personal email, assigns them to a job immediately, and then HiBob syncs with their work email. The hibobid match fails (doesn't exist yet), the contact fallback fails (emails don't match), and a duplicate is created.

How to prevent duplicates

- **Use consistent email addresses across systems.** If Lever and HiBob both have the same email for the candidate, matching will succeed regardless of sync order.

If duplicates occur

- Monitor for duplicate person records after hiring events. A duplicate will typically appear as two people with the same name or email — one with a hibobid contact and one with a Lever contact.
- Merge the duplicate promptly. The merged record must retain both contacts — the hibobid contact and the Lever contact — so future syncs from both systems match correctly.
- Do not delete either record before merging. Deleting removes the associated contact, which can break future sync matching.

A note on "hired" vs. "employed" status in HiBob

HiBob distinguishes between two pre-start statuses: **"hired"** (offer accepted, not yet started) and **"employed"** (active in HiBob). ChartHop intentionally does not sync workers with a "hired" status — only "employed." This is by design, since a pending hire in HiBob is not yet a ChartHop employee record.

The consequence: ChartHop won't create a person record from HiBob until the employee's status is "employed." Employees with a future start date will appear in ChartHop as "starting" and may be excluded from default org chart views until their start date arrives.

Contractor Headcount Conflicts

When HiBob syncs a new hire, ChartHop tries to place that person into an existing open job by matching on job title and reporting manager. This matching does not currently filter by employment type. A contractor synced from HiBob can inadvertently fill an open permanent headcount slot if the titles match.

Why this happens

Lever manages open requisitions. HiBob manages all workers, including contractors. If a contractor is hired with the title "Software Engineer" and there's an open req for "Software

Engineer" under the same manager, ChartHop's job matching may link them — removing the req from the open headcount pool.

Mitigations

Option	How it works	Tradeoff
Distinct contractor titles	Use a consistent suffix in HiBob for contractors (e.g., "Software Engineer - Contract"). This prevents title matching against permanent reqs.	Requires discipline in HiBob data entry. Title mismatch is permanent unless you rename the contractor record.
Exclude contractors from HiBob sync	Use the excludeEmployment option on the HiBob integration to skip contractor employment types entirely. Manage contractor records manually in ChartHop.	Contractors won't appear in org charts or headcount data unless entered manually. Higher maintenance overhead.
Post-sync review	After each HiBob sync, review contractor placements and manually correct any that filled the wrong slot.	Reactive, not preventive. Works for low contractor volumes but doesn't scale.

What Happens When a Lever Hire Webhook Fails

If the Lever hire webhook fires but ChartHop can't complete the hire, check the ChartHop process log for details. The most common causes specific to the HiBob/Lever interaction:

- **Person not found by email:** The candidate's email in Lever doesn't match any person's home or work email in ChartHop. Usually means HiBob hasn't synced the employee yet (see sequencing above), or the emails differ between systems.
- **Candidate has no email address:** A Lever candidate must have an email address for ChartHop to attempt a match at all. Candidates without an email will always fail.
- **No matching open job:** The leverReqId on the Lever req doesn't match any open job in ChartHop, or the job already has recruit status "Pending." Verify the req ID is correctly set on both sides.
- **No signed offer in Lever:** The hire webhook requires a signed offer. A verbal accept or offer-in-progress won't trigger it.

Setup Checklist: Running Both Integrations Together

Before going live with both integrations simultaneously:

- [ ] Confirm the candidate email used in Lever matches the work email entered in HiBob for all current employees. Consistent emails across both systems are the most reliable way to prevent duplicate person records.
- [ ] Verify that leverReqId values are correctly populated on all open ChartHop jobs before enabling the Lever sync.
- [ ] Confirm your HiBob contractor employment types (e.g., "Contract," "Fixed-term") are standardized. Non-standard values (e.g., "Consultant," "External") won't be classified correctly by ChartHop and may cause contractors to be treated as standard employees in headcount calculations.
- [ ] After the first hiring event under the combined integration, verify the resulting ChartHop record has both a hibobid contact and a Lever contact attached.

4.4.2. Payroll systems

The quickest way to add your organization to ChartHop is to create a sync with your payroll system through a ChartHop payroll app. This imports all your employees into a ChartHop org chart and keeps them up to date on a cadence of your choice: either on demand or once per day.

> **Roles**: Technical owner | Owner

How data migrates between ChartHop and a payroll system

ChartHop's payroll apps sync *inbound* from the payroll provider to ChartHop, so the payroll provider remains the source of truth on compensation and reporting structure while ChartHop always contains your latest employee roster.

Since the sync is one way, if you make changes to ChartHop data that originates from your payroll system, those changes are overwritten on the next sync.

Data typically synced from your payroll system includes:

- Demographics
- Contact information
- Title changes
- Reporting structure
- Compensation
- Group memberships (departments, teams, and locations)
- Hires and departures

Download the following PDF for a quick view of which ChartHop fields are supported by which payroll app.

ChartHop fields by payroll app.pdf

> If you track open roles in an applicant tracking system (ATS), ChartHop recommends also using an ATS app. Syncing ChartHop to both systems provides a clearer picture of your organization. **Learn more.**

Historical data syncs

Some payroll apps can sync historical data to ChartHop going back to a specified period. When a payroll app syncs historical data for the first time, all available past and present data is imported into ChartHop. On subsequent syncs, the app only imports data that has been changed during a specified window that you can configure.

When looking to import your company's historical data into ChartHop via a payroll sync, it's important to note that only certain payroll apps have the ability to provide their data to ChartHop. This is because ChartHop relies on the ability to query historical data by using the payroll system's API.

The following Payroll apps do not support historical data syncs:

- Rippling
- Sapling Onboarding from Kallidu

For the remaining apps where ChartHop is unable to import historical data via an API, ChartHop can still import their history, but the information must be provided through a spreadsheet import. This only needs to happen once.

ChartHop scenarios and payroll apps

When working with scenarios, keep in mind that when you are using a payroll app as your source of truth for employee data, your scenario data will be overwritten by any payroll system sync scheduled after you merge the scenario.

After a scenario is approved, you should make the changes in your payroll system before merging your scenario to your primary org to prevent your changes from being overwritten by your payroll system.

When using payroll apps with scenarios, syncing data between your payroll system and ChartHop will result in ChartHop's primary data being overwritten.

4.4.2.1. How payroll apps connect

When you set up your payroll app, you'll need to consider the following aspects of installation and configuration:

- Authentication
- Configuration
- Field Mapping

Authentication

You'll need to create a secure connection between ChartHop and your payroll system. In some cases, you need to enlist the help of a representative from ChartHop or your payroll system or both to ensure you have the correct credentials to connect your payroll system with CharHop. Typically, authentication will be established by one of the three methods:

- API Keys
- Administrative usernames/passwords
- Oauth flow

Configuration

After authenticating your payroll app integration, the next step is to configure it. You'll be able to fine tune the relationship between ChartHop and your payroll system by defining the integration's behaviors for:

- Data sync frequency
- Data sync inclusions/exclusions
- Email notifications

Mapping additional data

Once you have set up your payroll app, you can optionally map additional payroll fields to ChartHop or change how the default fields are mapped. Some of these are established already by default. You can add more or change how they are mapped to ChartHop fields.

ChartHop's payroll apps each support a different subset of ChartHop fields. This determines what data you can sync from your payroll provider to ChartHop. For example, if a payroll system referred to a data field type as a “termination”, ChartHop would need to register it as a “departure” in order to be understood correctly.

Download the following PDF for a quick view of which ChartHop fields are supported by which payroll app.

ChartHop fields by payroll app.pdf

4.4.2.2. Configuring payroll apps

After you've installed your payroll app, you can adjust your payroll app settings if needed. This includes configuring settings or adjusting when it syncs.

You can also add custom field mappings that allow you to sync additional data from your payroll system to ChartHop. The number of custom field mappings that you have will depend on your plan.

Manage app settings

You can update your payroll app settings and change the way that the payroll app synchronizes data and what data it includes.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Find your payroll system app and select the gear icon.
5. Select **edit** in any of the sections to view the settings and make changes.

Configure sync settings

You can change when the payroll app syncs data. You can turn the automated sync on or off or run an on-demand sync.

> If you turn off the payroll sync, your data in ChartHop remains unchanged.

Run a one-time sync

You can run a one-time sync from your payroll app. You can do this even when you have configured an automated sync. An on-demand sync runs as soon as you select the option. When you run a one-time sync, you have the flexibility of syncing your current payroll data to a ChartHop scenario.



1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Find your payroll system app and select the gear icon.
5. Select **Run a one-time sync** at the top right of the page.
6. Select whether you want sync to:
    - your primary org
    - to an existing scenario
    - to a new scenario that will be created when you sync
7. Choose if you want to exclude any employee IDs from your import.
8. Select **Run sync**.
9. Once completed, a message indicates that the sync has been completed.

Run an automated sync

ChartHop recommends configuring your payroll app to do a daily sync to Charthop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.

4. Find your payroll system app and select the gear icon to view the Manage app page.
5. In the **App status & sync settings** section, select **Edit.**
6. Select **Autosync** to turn the automated sync on or off.
7. Select **Save**.

Disable a payroll automated sync

You can disable your payroll app's automated sync at any time from the settings section in your payroll app.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Find your payroll system app and select the gear icon to view the Manage app page.
5. In the **App status & sync settings** section, select **Edit**.
6. Set **Auto sync** to off.
7. Select **Save**.

Exclude employees from payroll syncs

In some cases you may wish to omit one or more employees from your syncs.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Find your payroll system app and select the gear icon to view the Manage app page.
5. In the **Advanced Settings** section, select **Edit**.
6. In the **Exclude [Your payroll system] IDs** section, add the IDs of the employee(s) you wish to exclude from the sync.
    - All employee's who's IDs have been added to the list will no longer have their information updated during the sync.
7. Select **Save**.

Configure email notifications

You can add or change the list of people that get notified when a synchronization happens.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Find your payroll system app and select the gear icon to view the Manage app page.
5. If no email notifications are configured:
    1. Select **Add user.**
    2. Type a name to select someone from your organization.
    3. Continue entering names if needed.
    4. Select **Save**.
6. To add or delete someone from the list:
    1. Select **Edit**.
    2. Select the Trash icon next to a name to delete it.
    3. Type a name to select someone from your organization.
    4. Select **Save.**

Configure advanced settings

You can customize advance settings your payroll app data syncs to ChartHop. For example, you can exclude some data and set up notifications so that people in your org are notified when data is synchronized.

Advanced settings are automatically configured, so you can review these settings and update them if necessary.

After you've installed a payroll app, you can update these settings if you need to change them.

Field	Description	Default setting
Exclude IDs	If you want to exclude specific individuals from the sync, enter their unique IDs here, separated by commas. IDs can typically be found on employees' profile pages that were created via a payroll sync.	The list of IDs is blank.
Sync historical data	Include historical changes in your sync. You can configure how many days of data to include.	Historical data is included.
Job change history	Configure the number of days of history you want to include in your synchronized information.	
Sync all changes made	Select the changes you want to include in your sync. You can include some or all of the following: • Job titles • Managers • Groups • Compensation • Hire dates	All changes are included.
Default location when not set	Define whether or not you want to set the location to Remote or leave it empty if it is not set in your payroll system.	Location is set to remote if it is not set in your payroll system.

Field	Description	Default setting
Overwrite person fields	When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address and so on. This means any edits you or an employee makes to this data in ChartHop is overwritten when the synchronization takes place. This can pose an issue when someone uses ChartHop to updates employee fields in ChartHop, without requesting an update in the source system. ChartHop recommends to set this to yes to avoid needing to update both ChartHop and your payroll system when a change is made to one of these fields.	Set to yes. Payroll system data overwrites any changes to person data in ChartHop.

4.4.2.3. Installing payroll apps

ChartHop provides payroll apps for multiple payroll systems. The apps available to you depend on the ChartHop package you are using.

Payroll app list

Select a link for your payroll system below and follow the instructions to install and configure its integration app.

Download the following PDF for a quick view of which ChartHop fields are supported by which payroll app.

ChartHop fields by payroll app.pdf

Payroll app	ChartHop Basic	All other ChartHop Plans
ADP		✓
BambooHR	✓	✓
Gusto	✓	✓
Humaans		✓
Justworks	✓	✓
Namely	✓	✓
Paylocity		✓
Rippling (licensed API only)		✓
Sapling Onboarding From Kallidus	✓	✓
Sequoia One		✓
SuccessFactors		✓
TriNet		✓
Ultipro (UKG Pro)		✓
Workday		✓
Zenefits	✓	✓

HiBob Integration Workflow Guide

Overview

This guide covers best practices for running HiBob as your HRIS with ChartHop. HiBob serves as the source of truth for employee records, organizational structure, and compensation. Understanding how the sync works is critical to avoiding incorrect headcount, org chart issues, and data mapping problems.

How the Integration Works

What Data Syncs from HiBob

- **People:** Name, email, image, birth date, gender, ethnicity
- **Jobs:** Title, department, location, manager, start date, employment type
- **Compensation:** Base salary, pay period, currency, variable compensation
- **Change History:** Work changes, employment changes, salary changes, lifecycle events (hires and departures)

How Matching Works

The sync uses the HiBob employee ID (`hibobid`) as the unique identifier for matching records between systems. Each sync cycle fetches current worker data and historical changes, exports them to CSV, and imports them into ChartHop with upsert enabled.

Sync Modes

- **Initial sync:** Pulls all workers and full change history. Automatically detects the head of the organization and builds the org chart from scratch.
- **Incremental sync:** Pulls changes from a configurable lookback window (default: 30 days) plus all current worker data to keep records up to date.

Lifecycle Status Handling

HiBob lifecycle statuses map to ChartHop as follows:

- `"employed"` → Creates a HIRE change in ChartHop
- `"hired"` (offer accepted, not yet started) → Ignored — does not create a HIRE change
- `"terminated"` → Creates a DEPART change with reason type (voluntary/involuntary) and regret tracking

---

Employment Type Mapping

HiBob's `employment.type` field is mapped to ChartHop's employment type as follows:

HiBob `employment.type`	HiBob `employment.contract`	ChartHop Employment Type
Starts with "Perm" (e.g., "Permanent", "Permanent (UK)")	"Full time"	`FULL`
Starts with "Perm"	"Part time"	`PART`
Starts with "Contract" (e.g., "Contract", "Contractor")	Any	`CONTRACT`
Starts with "Fixed" (e.g., "Fixed-term")	Any	`TEMP`
"Apprentice" or "Intern"	Any	`INTERN`
Any other value	Any	Passed through unmapped

⚠ **Important:** If your organization uses non-standard employment type values for contractors (e.g., "Independent Contractor", "Consultant", "External", "Contingent Worker"), these will not be recognized as `CONTRACT` type. They will pass through unmapped and may be treated as standard employees in headcount calculations.

Action required: Ensure all contractor employment types in HiBob begin with "Contract" or "Fixed". If this is not possible, contact support to discuss custom mapping options.

Excluding Employment Types from Sync

If certain employment types should not sync to ChartHop at all, use the `excludeEmployment` app option. For example, setting `excludeEmployment: ["Intern", "Apprentice"]` will skip those workers entirely during sync.

Initial Setup Checklist

- [ ] **Understand the `daysBack` setting.** The default is 30 days. This setting only applies to incremental syncs — it controls how far back the sync looks for changes. Initial sync is not affected and pulls all available history. If you need an incremental sync to pick up historical changes older than 30 days (e.g., a missed hire event or a retroactive correction in HiBob), temporarily increase this value before running the sync.
- [ ] Enable `logUnmappedFields` during initial setup to identify HiBob custom fields that need mapping.
- [ ] Verify employment type values in HiBob match the expected patterns (see Employment Type Mapping above).
- [ ] Verify all custom field mappings point to the correct HiBob fields before running the first sync.
- [ ] Review the org chart after initial sync to identify any orphaned employees (missing manager or missing hire change).
- [ ] Confirm that any department or location filters applied to the sync do not exclude managers of employees who are included in the sync.

Common Issues and Troubleshooting

Employee Not Appearing in Org Chart

Symptom: An employee exists in HiBob but doesn't appear in ChartHop's org chart.

Common causes:

1. **Missing manager:** The org chart is built from manager relationships. If the employee's manager field in HiBob is empty or references an unknown ID, the employee will exist in ChartHop but won't be connected to the org tree.
2. **Missing HIRE change:** ChartHop requires a HIRE change to place a person into a job. HiBob's lifecycle status must be `"employed"` — a status of `"hired"` (offer accepted but not started) is intentionally excluded from sync. Verify the employee's lifecycle status in HiBob.
3. **Manager in excluded department:** If you're using sync filters to exclude certain departments, any employee whose manager is in an excluded department will have an incorrect or missing manager assignment. The sync cannot look up managers that don't exist in ChartHop.
4. **HIRE event missing manager data:** If HiBob's lifecycle/work history doesn't include a manager on the hire date, ChartHop may fail to create the hire. Check if the employee's earliest work history entry includes a `reportsTo` value.
5. **Hire date older than history lookback:** If the employee's hire date was missed during initial sync and the `daysBack` lookback window on subsequent incremental syncs doesn't reach back far enough, their HIRE change will not be imported. Temporarily increase `daysBack` and run a sync, or contact support.
6. **Future start date:** Employees with a future start date appear as "starting" (`is:starting`) and may be excluded from default org chart views. They will appear once their start date arrives.

Diagnostic steps:

- Search for the person in ChartHop by name or email
- Check if they have a HIRE change with a valid date
- Check if their job has a manager relationship
- Search for duplicate person records
- Verify the employee's lifecycle status and manager in HiBob

---

Contractors Consuming Permanent Headcount

Symptom: A contractor synced from HiBob is placed into an open permanent role, consuming planned headcount in the wrong department.

Cause: When HiBob syncs a new hire, ChartHop's matching logic looks for an open job with the same title and manager. This matching does not currently distinguish between permanent and contractor roles. If a contractor has the same title as an open permanent requisition, they may be placed into that slot.

Current workarounds:

- Use distinct job titles for contractors vs. permanent roles (e.g., "Software Engineer - Contractor" vs. "Software Engineer")
- Use the `excludeEmployment` option to exclude contractors from the HiBob sync entirely, and manage contractor records manually in ChartHop
- After sync, review contractor placements and manually move any that were incorrectly assigned

```
 Known limitation: ChartHop does not currently filter open job matching by employment type. Contact your CSM for the latest status.
```

Custom Field Mapping Issues

Symptom: A HiBob custom field is not appearing in ChartHop, or is mapped to the wrong ChartHop field.

Cause: HiBob custom fields are only synced if they are explicitly included in the field mapper configuration. Unmapped fields are discarded during sync.

Troubleshooting:

- Enable the `logUnmappedFields` app option to see which HiBob fields are available but not mapped
- Verify that the field mapper points to the correct HiBob field path — HiBob uses a lookup table system where field values can be keys into "lists", and the displayed value may differ from the API value
- If a ChartHop field is mapped to the wrong HiBob column (e.g., "Team" mapped to a column that returns "Team Type" values), update the field mapper to reference the

correct source field

 Note: Changes to field mapper configuration take effect on the next sync cycle. After remapping, run a manual sync to verify the correction.

Custom Group Fields Appending Instead of Overwriting

Symptom: An employee shows multiple values for a custom group field (e.g., multiple locations or sub-teams) after each sync, rather than having the old value replaced.

Cause: Custom group fields in ChartHop currently append new values by default. Single-value overwrite mode for custom groups is not yet supported.

 Known limitation: There is no configuration workaround at this time. Contact your CSM for the latest status on this feature request.

Incorrect Manager After Department Filter Exclusion

Symptom: An employee shows the wrong manager (often the head of the organization) after sync.

Cause: A sync filter is excluding the department that contains the employee's actual manager. When ChartHop can't find the referenced manager in the synced data, it falls back to assigning the head job as the manager.

Resolution: Either include the manager's department in the sync filter, or manually maintain the manager relationship for affected employees. Note that all employees managed by someone in the excluded department will be affected, not just one.

Preferred Name Not Syncing

Symptom: An employee's preferred name in HiBob is not reflected in ChartHop.

Cause: The default field mapper maps `employee.firstName` and `employee.surname` to ChartHop's name fields. HiBob preferred name fields may not be included in the default mapping.

Resolution: Verify that the preferred name field from HiBob is mapped to ChartHop's `name.pref` field in the field mapper configuration. If not present, add the mapping.

Default Field Mappings

The following fields are mapped by default from HiBob to ChartHop:

ChartHop Field	HiBob Source (Current State)	HiBob Source (Change History)
First Name	`employee.firstName`	—
Last Name	`employee.surname`	—
Work Email	`employee.email`	—
Title	`employee.work.title`	`work.title`
Manager	`employee.work.manager`	`work.reportsTo.id`
Department	`employee.work.department`	`work.department`
Location	`employee.work.site`	`work.site`
Start Date	`employee.work.startDate`	—
Employment Type	`employment.type` + `employment.contract`	`employment.type` + `employment.contract`
Base Compensation	Salary amount + pay period + currency	Salary history
Variable Compensation	Variable type + amount + currency	Variable history
Lifecycle Events	—	`lifecycle.status` (employed/terminated)

Any HiBob field not listed above requires explicit addition to the field mapper configuration.

Best Practices

1. **HiBob is the source of truth for employee data.** Configure it as the primary sync and let it maintain all records.
2. **Standardize employment types in HiBob.** Contractors must use values starting with "Contract" or "Fixed" to be correctly classified.
3. **Avoid excluding departments from sync** if those departments contain managers of included employees.
4. **Verify custom field mappings during setup** using `logUnmappedFields`.
5. **Use distinct titles for contractor vs. permanent roles** to prevent incorrect job matching.
6. **Monitor the first few sync cycles after setup** — check for orphaned employees, incorrect managers, and unexpected headcount assignments.
7. **Verify lifecycle statuses in HiBob** — only `"employed"` creates a HIRE in ChartHop. Employees with `"hired"` status will not sync until their status changes.

4.4.2.3.2. ADP

With the ADP app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes contact information, demographics, compensation, managers, departments, teams, and locations.

Jump to **Installing the ADP Data Connector**

Jump to **Installing the ADP (Legacy) app**

ADP at a glance

The following table summarizes ChartHop's ADP app.

Supported ChartHop packages	• Standard • Premium
Supported ADP package	WorkForce Now
Prerequisites	ChartHop supports integrating with ADP Workforce Now and does not support other ADP integrations at this time.
Data direction	Inbound from ADP to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Yes, through the **Workers API**. For ChartHop Premium customers only. Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how payroll apps work in ChartHop.
Synced Data	The default **synced data** from ADP to ChartHop.

4.4.2.3.2.1. Installing the ADP (Legacy) app

This section covers setting up the ADP (Legacy) app, which allows you to sync your employee roster to ChartHop.

Please note: This app is considered legacy. For the best experience, we recommend our newer **Installing the ADP Data Connector** app.

Install Instructions

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for ADP

For ChartHop to access your organization's ADP payroll data, you need to obtain an API client ID and secret from your ADP representative. This information allows ChartHop to connect to ADP to receive your employee data.

You can obtain an API key by emailing your ADP representative. When you do so, include **support@charthop.com** so that a ChartHop representative can help you.

Install the ADP app

After you have your ADP API key, you can install the ADP integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.

4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the ADP app

You'll be prompted to configure your payroll app when you select to install.

1. In the **Enter your API credentials** step, enter the following information that you received from your ADP representative in the following order:
    - Client ID
    - Secret
2. Select **Next step**.

Configure data sync settings for ADP

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
Include ADP companies	Indicate the ADP companies you want to include in your sync. You should set this only if you track multiple companies in your ADP instance.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.2.2. Installing the ADP Data Connector

This section covers setting up the ADP (Legacy) app, which allows you to sync your employee roster to ChartHop.

For a full list of data fields included in the integration, see **Synced data from ADP**.

Install Instructions

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

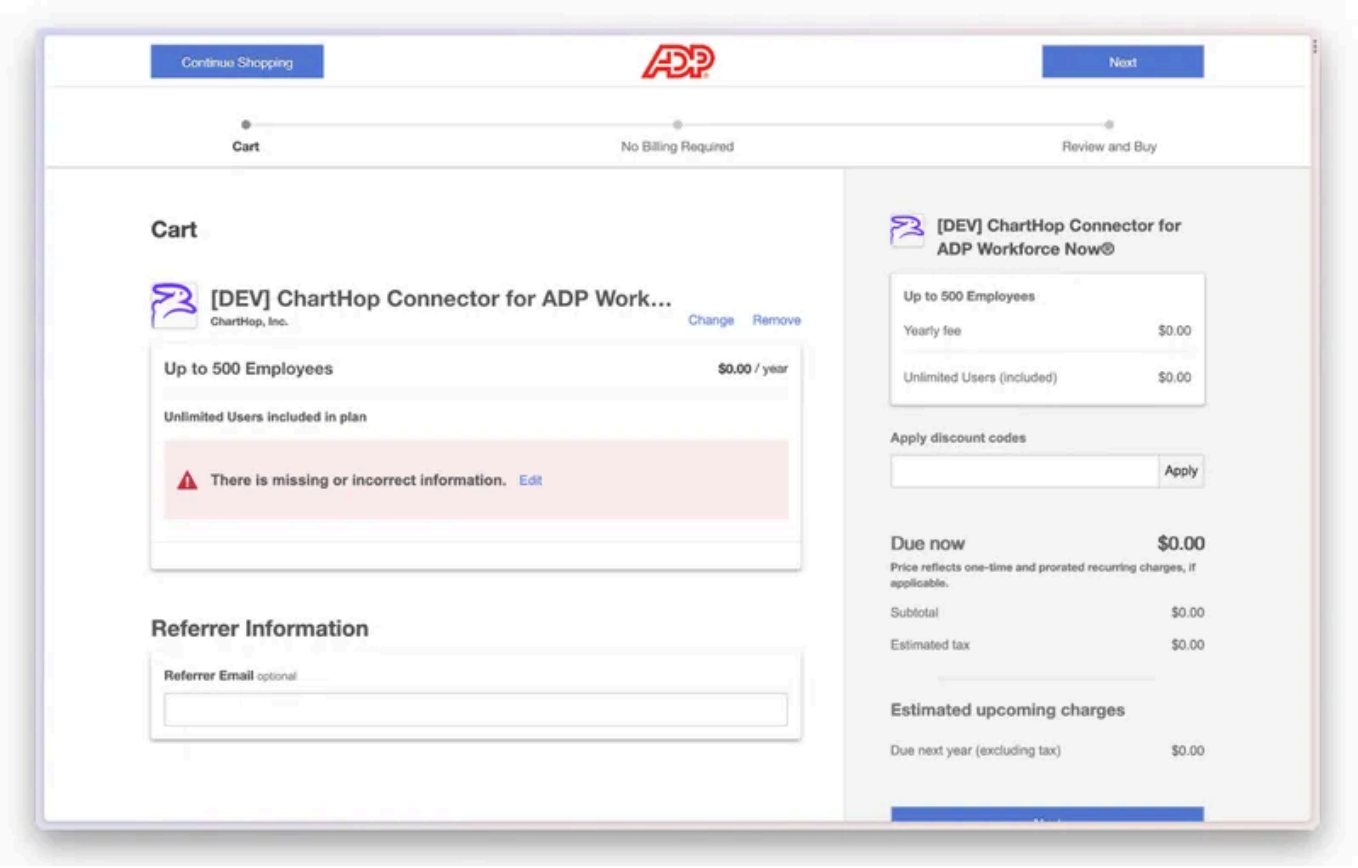
Purchase ChartHop Connector for ADP Workforce Now

The Data Connector is installed through the ADP Marketplace.

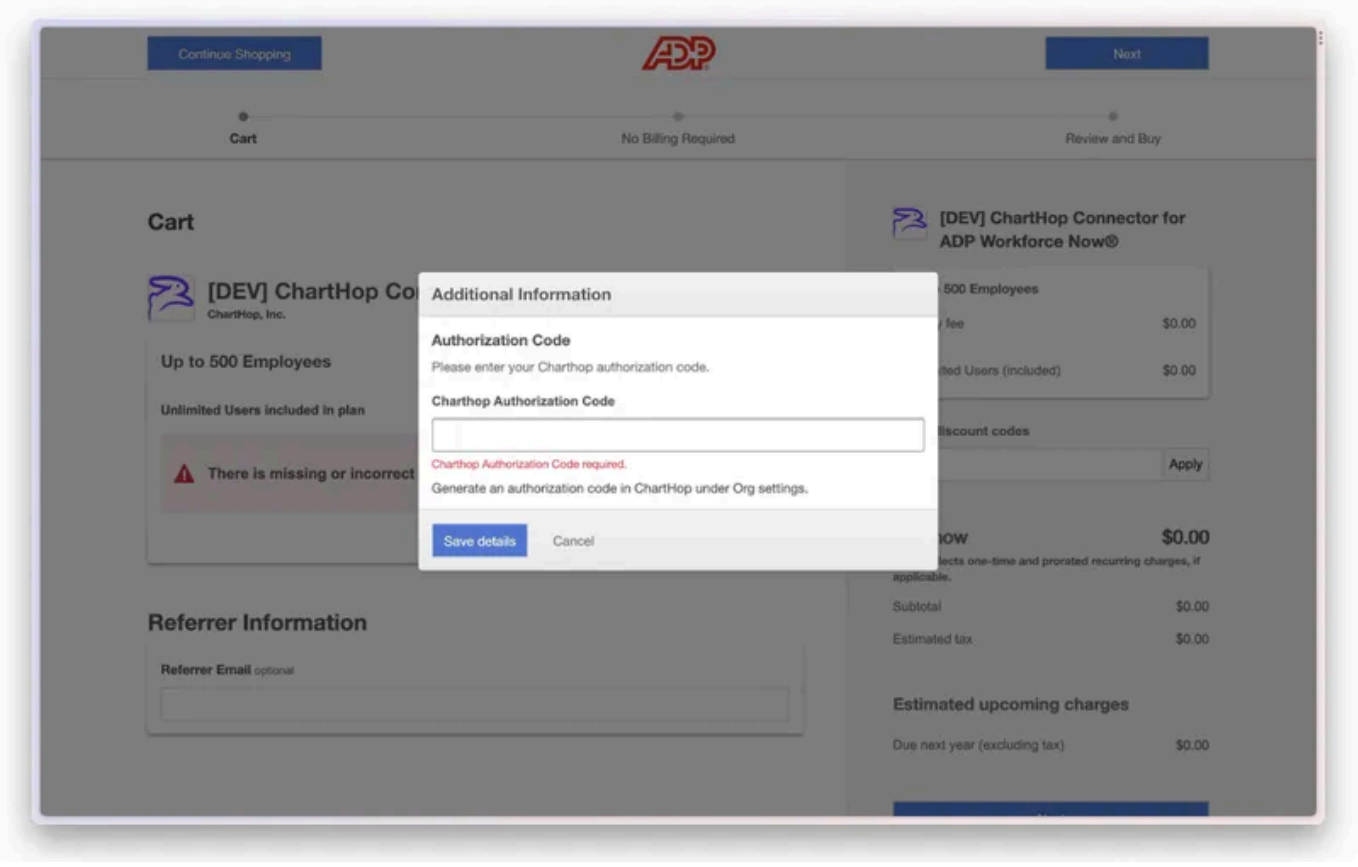
> The Data Connector requires a $360/yr fee paid to ADP.

1. The purchasing/installing user will need to have admin privileges in ADP WFN.
2. Navigate to the ADP Data Connector:
    - **Existing** ChartHop customers: navigate to the ChartHop Data Connector marketplace listing
    - **New** ChartHop customers: purchase ChartHop with the Data Connector here.
3. Click **Buy Now**
4. During checkout, you will be asked for your **Authorization Code**.
    1. To find your **Authorization Code,** from the left sidebar, select **Apps & Bundles**.

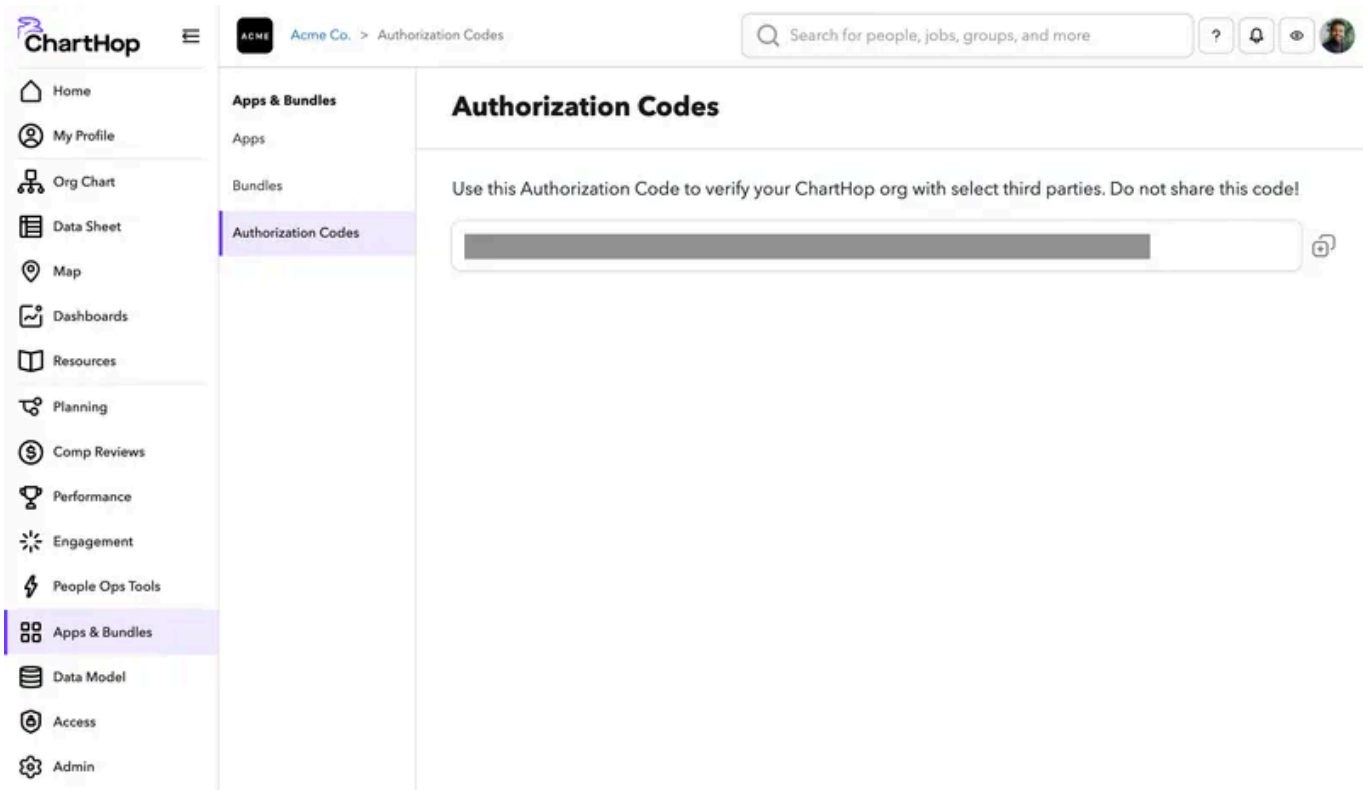
2. From the sub-menu, select **Authorization Codes.**



ADP checkout flow



Enter ChartHop authorization code



Find your ChartHop authorization code

5. Once purchased, the ADP Data Connector app will be installed in your ChartHop org automatically.

6. After checkout, you will need to give ChartHop consent to **access your ADP data**. Check your email for the consent link, generally titled **"Connection Request"**. This email will be sent from an ADP email address. Follow the instructions in the link to grant ChartHop access to your ADP data.

Configure data sync settings for ADP

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
  - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
  - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
Include ADP companies	Indicate the ADP companies you want to include in your sync. You should set this only if you track multiple companies in your ADP instance.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.2.2.1. Synced data from ADP

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

The following table lists the default data set synced from ADP to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	ADP field code
Base	base	workers.workAssignment.baseRemuneration.payPeriodRateAmount.amountValue, workers.workAssignment.baseRemuneration.payPeriodRateAmount.currencyCode, workers.workAssignment.baseRemuneration.hourlyRateAmount.amountValue, workers.workAssignment.baseRemuneration.hourlyRateAmount.currencyCode, workers.workAssignment.payCycleCode.codeValue
Birth Date	birthdate	workers.person.birthDate
City - Home Address	address.city	workers.person.legalAddress.cityName
Company	company	workers.workAssignment
Country - Home Address	address.country	workers.person.legalAddress.countryCode
Currency	currency	workers.workAssignment.baseRemuneration.payPeriodRateAmount.amountValue, workers.workAssignment.baseRemuneration.payPeriodRateAmount.currencyCode, workers.workAssignment.baseRemuneration.hourlyRateAmount.amountValue, workers.workAssignment.baseRemuneration.hourlyRateAmount.currencyCode, workers.workAssignment.payCycleCode.codeValue

ChartHop field label	ChartHop field code	ADP field code
Date	date	workers.workAssignment.actualStartDate, workers.workAssignment.terminationDate, workers.workAssignment.baseRemuneration.effectiveDate
Depart	depart	workers.workAssignment.terminationDate, workers.workAssignment.assignmentStatus.reasonCode.codeValue, workers.workAssignment.voluntaryIndicator
Department	department	workers.workAssignment
Employment	employment	workers.workAssignment.workerTypeCode.codeValue
Ethnicity	ethnicity	workers.person.raceCode.codeValue
First Name	name.first	workers.person.legalName.givenName
Gender	gender	workers.person.genderCode.codeValue
Home Email	contact.homeemail	workers.person.communication.emails[0].emailUri
Home Phone	contact.homephone	workers.person.communication.landlines[0].formattedNumber

ChartHop field label	ChartHop field code	ADP field code
Hourly	hourly	workers.workAssignment.baseRemuneration.payPeriodRateAmount.amountValue, workers.workAssignment.baseRemuneration.payPeriodRateAmount.currencyCode, workers.workAssignment.baseRemuneration.hourlyRateAmount.amountValue, workers.workAssignment.baseRemuneration.hourlyRateAmount.currencyCode, workers.workAssignment.payCycleCode.codeValue
Last Name	name.last	workers.person.legalName.familyName1
Location	location	workers.workAssignment.homeWorkLocation.nameCode.shortName
Manager	manager	workers.workAssignment.reportsTo[0].workerID.idValue
Middle Name	name.middle	workers.person.legalName.middleName
Mobile	contact.mobilephone	workers.businessCommunication.mobiles[0].formattedNumber, workers.person.communication.mobiles[0].formattedNumber
Preferred First Name	name.pref	workers.person.legalName.nickName
Start Date	startdate	workers.workerDates.rehireDate, workers.workerDates.originalHireDate

ChartHop field label	ChartHop field code	ADP field code
State - Home Address	address.state	workers.person.legalAddress.countrySubdivisionLevel1.codeValue
Street 1 - Home Address	address.street 1	workers.person.legalAddress.lineOne
Street 2 - Home Address	address.street 2	workers.person.legalAddress.lineTwo
Street 3 - Home Address	address.street 3	workers.person.legalAddress.lineThree
Title	title	workers.workAssignment.jobCode.longName, workers.workAssignment.jobCode.shortName
Work Email	contact.work email	workers.businessCommunication.emails[0].emailUri
Work Fax	contact.	workers.businessCommunication.faxes[0].formattedNumber

ChartHop field label	ChartHop field code	ADP field code
	work fax	
Work Phone	contact.workphone	workers.businessCommunication.landlines[0].formattedNumber
Zip/Postal - Home Address	address.postal	workers.person.legalAddress.postalCode
Used to store profile photos	imageurl	workers.photos[0].links[0].href

Hourly compensation rate calculations

To calculate hourly compensation, the following fields are used from ADP and are translated to ChartHop codenames:

ChartHop codename	ADP field code
baseAmount	workers.workAssignment.baseRemuneration.payPeriodRateAmount.amountValue
baseCurrency	workers.workAssignment.baseRemuneration.payPeriodRateAmount.currencyCode
hourlyAmount	workers.workAssignment.baseRemuneration.hourlyRateAmount.amountValue
hourlyCurrency	workers.workAssignment.baseRemuneration.hourlyRateAmount.currencyCode
(As in ADP)	workers.workAssignment.payCycleCode.codeValue

ChartHop uses a multiplier to correspond to the number of pay periods for a given employee. Below are the codes ChartHop receives from ADP and the multipliers it maps to them:

- **M** - 12 (monthly)
- **S** - 24 (semi-monthly)
- **B** - 26 (bi-weekly)

ChartHop first checks if `baseAmount` is provided. If so, it takes that value and times it by the given multiplier to determine a given employee's salary.

If `baseAmount` isn't provided, ChartHop checks `hourlyAmount` and sets it to its hourly field.

ChartHop also grabs either `baseCurrency` or `hourlyCurrency` depending on whether `baseAmount` or `hourlyAmount` is provided and uses that value to set its currency field.

4.4.2.3.3. BambooHR

With the BambooHR app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes titles, managers, departments, location, hires and departures, contact information, demographics, compensation changes, and time off.

BambooHR at a glance

The following table summarizes ChartHop's BambooHR app.

Supported ChartHop packages	• Basic • Standard • Premium
Supported Bamboo package	Advantage
Prerequisites	A BambooHR administrator account with access to BambooHR API keys.
API key permissions	As a BambooHR administrator, add a new API key from BambooHR and save the key information for use in ChartHop.
Data direction	Inbound from BambooHR to ChartHop
Sync cadence	Daily or as needed
Effective dating support	Yes
Additional field mapping support	Yes, for ChartHop Premium customers, from the following field categories: • List Metadata • Tables Metadata • TimeOff Types Metadata • Field Metadata • EmploymentStatus • JobInfo • Compensation • TimeOff • Photo • Custom Report For more information, see the **BambooHR documentation**. Please direct all custom mapping requests to ChartHop's Professional Services team.

Supported ChartHop packages	• Basic • Standard • Premium
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Bamboo HR to ChartHop.

4.4.2.3.3.1. Synced data from BambooHR

The table below lists the default data set that is synced from BambooHR to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

Fields list

ChartHop field label	ChartHop field code	BambooHR field code
Base	base	compensation.rate.value, compensation.type, compensation.paidPer, compensation.payPer
Birth Date	birthdate	customReport.dateOfBirth
City - Home Address	address.city	customReport.city
Country - Home Address	address.country	customReport.country
Currency	currency	compensation.rate.currency
Date	date	employmentStatus.date, jobInfo.date, compensation.startDate, timeOff.start
Depart	depart	employmentStatus.terminationTypeId
Department	department	jobInfo.department
Employment	employment	employmentStatus.employmentStatus
Ethnicity	ethnicity	customReport.ethnicity
First Name	name.first	customReport.firstName
Gender	gender	customReport.gender
Home Email	contact.homeemail	customReport.homeEmail
Home Phone	contact.homephone	customReport.homePhone
Hourly	hourly	compensation.rate.value, compensation.type, compensation.paidPer, compensation.payPer
Last Name	name.last	customReport.lastName
Location	location	jobInfo.location
Manager	manager	customReport.supervisorEId, jobInfo.reportsTo
Middle Name	name.middle	customReport.middleName

ChartHop field label	ChartHop field code	BambooHR field code
Mobile	contact.mobilephone	customReport.mobilePhone
Preferred First Name	name.pref	customReport.preferredName
Promotion	promotion	compensation.reason
State - Home Address	address.state	customReport.stateCode, customReport.state
Street 1 - Home Address	address.street1	customReport.address1
Street 2 - Home Address	address.street2	customReport.address2
Title	title	customReport.jobTitle, jobInfo.jobTitle
Work Email	contact.workemail	customReport.workEmail
Work Phone	contact.workphone	customReport.workPhone
Zip/Postal - Home Address	address.postal	customReport.zipcode
Used to store compensation information	type	employmentStatus.employmentStatus
Used to store profile photos	imageurl	customReport.id, customReport.isPhotoUploaded
Used to store time off information	timeoff.approval	timeOff.status.status
Used to store time off information	timeoff.days, timeoff.hours	timeOff.amount.unit, timeOff.amount.amount
Used to store time off information	timeoff.enddate	timeOff.end

ChartHop field label	ChartHop field code	BambooHR field code
Used to store time off information	timeoff.id	timeOff.id
Used to store time off information	timeoff.note	timeOff.notes.employee
Used to store time off information	timeoff.startdate	timeOff.start
Used to store time off information	timeoff.type	timeOff.type.name

Hourly compensation rate calculations

When calculating hourly compensation for Bamboo, ChartHop uses the following fields:

Field	Detail
compensation.rate.value	The amount paid.
Compensation.type	The compensation type. Can either be hourly or salary.
compensation.paidPer	Where paidPer can be hourly, monthly, or yearly.
compensation.payPer	Where payPer can be hourly, monthly, or yearly.

The value of `compensation.rate.value` is calculated depending on the `Compensation.type`, and whether `compensation.paidPer` or `compensation.payPer` are calcuated hourly, monthly, or yearly.

Hourly calculation

In the case where the following fields are set to hourly:

- `compensation.paidPer`
- `compensation.payPer`

Hourly compensation is defined as `compensation.rate.value` where `compensation.rate.value` is the hourly rate.

Monthly calculation

In the case where the following fields are set to monthly:

- `compensation.paidPer`
- `compensation.payPer`

Hourly compensation is defined as `compensation.rate.value * 12 / 2080`, meaning that the value provided to in `compensation.rate.value` is the monthly pay for an employee and that employee is assumed to work 52 weeks a year at 40 hours a week.

Yearly salary calculation

In the case where the `Compensation.type` is salary and following are yearly:

- `compensation.paidPer`
- `compensation.payPer`

Salary is defined as `compensation.rate.value` where `compensation.rate.value` is the yearly salary.

4.4.2.3.3.2. Installing the BambooHR app

This section covers setting up the BambooHR integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for BambooHR

For ChartHop to access your organization's BambooHR payroll data, you need to create an API key in BambooHR that you can use in ChartHop. This information allows ChartHop to connect to BambooHR to receive your employee data.

1. Log into BambooHR as an administrator who has permission to create API keys.
2. Click your name in upper right-hand corner of any page to get to the **User Context Menu** and select the **API Keys** option**.**
3. Select **Add New API Key.**
4. Name the new key "ChartHop".
5. Copy the API key to a safe place.
6. When accessing BambooHR, take note of the BambooHR subdomain name. In this URL example, acme.BambooHR.com, **acme** is the subdomain.

Install the BambooHR app

After you have your BambooHR API key, you can install the BambooHR integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the BambooHR app

You'll be prompted to configure your payroll app when you select **Install**.

1. Enter your BambooHR subdomain in the field provided. In this URL example, acme.bamboohr.com, **acme** is the subdomain.
2. In the **Create your API key** step, copy the API key you created to the provided field.
3. Select **Next step**.

Configure data sync settings for BambooHR

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
Job change history	When importing job data into ChartHop, include changes within the specified period.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.4. Gusto

With the Gusto app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes titles, managers, departments, location, hires and departures, contact information, demographics, compensation changes, and time off.

Gusto at a glance

The following table summarizes ChartHop's Gusto app.

Supported ChartHop packages	• Basic • Standard • Premium
Supported Gusto packages	• Simple • Plus • Premium
Prerequisites	A Gusto account with administrator privileges and a ChartHop account with the Owner role.
API key permissions	None needed. Follow the installation process from within ChartHop.
Data direction	Inbound from Gusto to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	For ChartHop Premium customers, custom mapping is available for the **employees** field category. Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Gusto to ChartHop.

4.4.2.3.4.1. Synced data from Gusto

The table below lists the default data set that is synced from Gusto to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Gusto field code
Base	base	employee.jobs[0].compensations[0].rate, employee.jobs[0].compensations[0].payment_unit
Birth Date	birthdate	employee.date_of_birth
City - Home Address	address.city	employee.home_address.city
Country - Home Address	address.country	employee.home_address.country
Depart	depart	employee.terminationTypeId
Department	department	employee.department
End Date	type, enddate	employee.terminations
First Name	name.first	employee.first_name
Home Email	contact.homeemail	employee.email, employee.work_email
Hourly	hourly	employee.jobs[0].compensations[0].rate, employee.jobs[0].compensations[0].payment_unit
Last Name	name.last	employee.last_name
Location	location	employee.jobs[0].location.city
Manager	manager	employee.manager_id
Middle Name	name.middle	employee.middle_initial
Mobile	contact.mobilephone	employee.mobilePhone
Preferred First Name	name.pref	employee.preferred_first_name
Start Date	startdate	employee.jobs[0].hire_date
State - Home Address	address.state	employee.home_address.state

ChartHop field label	ChartHop field code	Gusto field code
Street 1 - Home Address	address.street1	employee.home_address.street_1
Street 2 - Home Address	address.street2	employee.home_address.street_2
Title	title	employee.jobs[0].title
Work Email	contact.workemail	employee.work_email, employee.email
Work Phone	contact.workphone	employee.workPhone
Zip/Postal - Home Address	address.postal	employee.home_address.zip

Employment status

The table below displays how ChartHop's and Gusto's employment statuses map to one another:

Gusto Status	Direction	ChartHop status
full_time	➡	FULL
part_time_under_twenty_hours	➡	PART
part_time_twenty_plus_hours	➡	PART
variable	➡	PART
seasonal	➡	TEMP

4.4.2.3.4.2. Installing the Gusto app

This section covers setting up the Gusto integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Install the Gusto app

After you have your Gusto Access Token and the Gusto subdomain name, you can install the Gusto integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Gusto app

You'll be prompted to configure your payroll app when you select **Install**.

1. Select the **Go to Gusto** button and log in to Gusto.
2. You'll be prompted to authorize ChartHop to connect to Gusto in Gusto.
3. Select the **Authorize** button in Gusto.
4. Select **Next step**.

Configure data sync settings for Gusto

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

1. Choose how you want to handle employee departures:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.
2. Choose if you want to include contractor data in your sync.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.5. Humaans

The Humaans app allows you to sync your payroll data to ChartHop, automatically building your org chart and keeping it up to date. Synced data includes title, manager, department, location, hires and departures, personal contact and demographic information, compensation changes, and time off.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Humaans at a glance

The following table summarizes ChartHop's Humaans app.

Supported Humaans packages	• Growth • Enterprise
Prerequisites	A ChartHop account with the Technical Owner role and a Humaans account with Administrator permissions.
API key permissions	Same as Humaans administrator
Data direction	Inbound from Humaans to ChartHop
Sync cadence	Daily or as needed
Effective dating support	Yes
Additional field mapping support	Additional field mapping is available for the following Humaans field categories: • **Employees** • **Compensation** • **Jobs** • **Time off** Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Humaans to ChartHop.

4.4.2.3.5.1. Synced data from Humaans

The table below lists the default dataset that is synced from Humaans to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Humaans field code
Base	base	compensation.amount, compensation.period, compensation.type
Birth Date	birthdate	employee.birthday
City - Home Address	address.city	employee.city
Country - Home Address	address.country	employee.country
Currency	currency	compensation.currency
Date	type, date, startdate, enddate	employee.employmentStartDate, employee.employmentEndDate
Date	date	timeOff.id
Depart	depart	employee.teams
Department	department	jobRoles.department
Employment	employment	employee.contractType
First Name	name.first	employee.firstName
Gender	gender	employee.gender
Home Email	contact.homeemail	employee.personalEmail
Hourly	hourly	compensation.amount, compensation.period, compensation.type
Last Name	name.last	employee.lastName
LInkedIn	contact.linkedin	employee.linkedIn
Location	location	employee.locationId, locations.ids
Manager	manager	jobRoles.reportingTo
Middle Name	name.middle	employee.middleName

ChartHop field label	ChartHop field code	Humaans field code
Mobile	contact.mobilephone	employee.personalPhoneNumber
Preferred First Name	name.pref	employee.preferredName
Promotion	promotion	compensation.note
Slack	contact.slack	employee.slack
State - Home Address	address.state	employee.state
Street 1 - Home Address	address.street1	employee.address
Team	team	employee.teams
Title	title	jobRoles.jobTitle
Twitter	contact.twitter	employee.twitter
Variable	variable	compensation.amount, compensation.period, compensation.type
Work Email	contact.workemail	employee.email
Work Phone	contact.workphone	employee.phoneNumber
Zip/Postal - Home Address	address.postal	employee.postcode
Used to store compensation information	variabletype	compensation.type
Used to store profile photos	imageurl	employee.profilePhoto.variants.320
Used to store time off information	timeoff.approval	timeOff.type
Used to store time off information	timeoff.days, timeoff.hours	timeOff.days

ChartHop field label	ChartHop field code	Humaans field code
Used to store time off information	timeoff.enddate	timeOff.endDate
Used to store time off information	timeoff.note	timeOff.note
Used to store time off information	timeoff.startdate	timeOff.startDate

4.4.2.3.5.2. Installing the Humaans app

This section covers setting up the Humaans integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Create a Humaans API key

For ChartHop to access your organization's Humaan's payroll data, you need to create an API key to use when configuring the app.

You use Humaans to create this API Key.

1. In Humaans, select your profile icon at the top-right corner.
2. Select **API Access Tokens**.
3. Select **Generate New Token**, and create an API token named "ChartHop."

Install the Humaans app

After you have your Humaans API key, you can install the Humaans integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Humaans app

When you select install, you'll be prompted to walk through configuring your payroll app.

1. the provided field.
2. Select **Next step**.

Configure data sync settings for Humaans

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.
3. When finished, select **Next step**.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an employee. • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
Job change history	When importing job data into ChartHop, include changes within the specified period.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.6. Justworks

With the Justworks app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes titles, contact information, demographics, compensation, managers, departments, and locations.

Justworks at a glance

The following table summarizes ChartHop's Justworks app.

Supported ChartHop packages	• Standard • Premium
Supported JustWorks packages	• Plus • Basic
Prerequisites	A ChartHop account with the Owner role and a JustWorks account with administrator privileges.
API key permissions	ChartHop communicates with JustWorks through their API. You'll need to create a JustWorks API key to use with ChartHop and grant the key the following user permissions: • A Worker type of 3rd Party Accountant/Admin • View invoices & reporting permissions • Manage employees permissions API key credentials will be added to the JustWorks application within ChartHop.
Data direction	Inbound from Justworks to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	For ChartHop Premium customers, custom mapping is available for the following Justworks field categories: • members • custom Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.

Supported ChartHop packages	• Standard • Premium
Synced Data	The default **synced data** from Justworks to ChartHop.

4.4.2.3.6.1. Synced data from Justworks

The following table lists the default data set that is synced from Justworks to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	Charthop field code	Justworks field code
Base	base	members.pay, members.payBasis, members.nonUsEmployee
Birth Date	birthdate	members.dateOfBirth
City - Home Address	address.city	members.address.city
Country - Home Address	address.country	members.address.country
Currency	currency	members.pay, members.payBasis, members.nonUsEmployee
Department	department	members.department
Employment	employment	members.memberType
End Date	enddate	members.terminatedDate
Ethnicity	ethnicity	members.eeo1Race.value
First Name	name.first	members.firstName
Gender	gender	members.eeo1Gender.value
Home Email	contact.homeemail	members.emailAddresses.home
Home Phone	contact.homephone	members.phoneNumbers.home
Hourly	hourly	members.pay, members.payBasis, members.nonUsEmployee
Last Name	name.last	members.name, members.firstName
Location	location	members.office
Manager	manager	members.manager.uuid
Mobile	contact.mobilephone	members.phoneNumbers.cell
Start Date	startdate	members.startDate

ChartHop field label	Charthop field code	Justworks field code
State - Home Address	address.state	members.address.state
Street 1 - Home Address	address.street1	members.address.street1
Street 2 - Home Address	address.street2	members.address.street2
Title	title	members.title
Work Email	contact.workemail	members.emailAddresses.work
Work Phone	contact.workphone	members.phoneNumbers.office
Zip/Postal - Home Address	address.postal	members.address.postal_code
Used to store profile photos	imageurl	members.photoUrl

4.4.2.3.6.2. Installing the Justworks app

This section covers setting up the Justworks integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Create a Justworks user for ChartHop

For ChartHop to access your organization's Justworks payroll data, you need to create a **3rd party admin** user in Justworks that you can use in ChartHop.

Follow the **instructions** in the Justworks documentation to create a 3rd party admin user. This admin user must have the following Justworks permissions:

1. View invoices and reporting
2. Manage Employees

After you create your Justworks user, you can prepare to configure Google multi-factor authentication.

Configure Google multi-factor authentication

To improve the quality and speed of the Justworks data sync, you need to configure Google's multi-factor authentication in Justworks. This generates a bar code ChartHop needs in order to complete your Justworks app installation.

1. Log into JustWorks using the account you created for ChartHop.
    - The username of this account can be found in the Justworks app settings in ChartHop.
    - When you log in, you may need to enter your 2-factor authentication code sent to the phone number you previously registered with the account.
2. After you log in, set up your Google Authenticator using a 2-factor authentication method. This generates a bar code ChartHop needs in order to access your Justworks data:
    - Select **Account Settings** in the navigation menu.
    - In **Account Settings**, select **Security/Log in**.
    - Select **Verify to edit** on the **Multi-factor Authentication** box.
    - Select **Set up** on the **Google Authenticator** option.
    - When viewing the QR code, select **Can’t scan the QR code?** beneath the QR code.
    - Copy the displayed code by copy/pasting it into a safe place.

Install the Justworks app

After you have your Justworks user and google authentication code, you can install the Justworks integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Justworks app

You'll be prompted to configure your payroll app when you select **Install**.

1. Enter the username and password of the user you created in Justworks.
2. Copy the Google multi-factor authentication code you saved from Justworks.
3. Select **Next step**.

Configure data sync settings for Justworks

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.7. Namely

With the Namely app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes titles, contact information, demographics, compensation, managers, departments, and locations.

Namely at a glance

The following table summarizes ChartHop's Namely app.

Supported ChartHop package	• Basic • Standard • Premium
Supported Namely package	HR Fundamentals
Prerequisites	A ChartHop account with the Owner role and a Namely account with administrator privileges.
API key permissions	As a Namely administrator, create a Personal Access Token and save it in ChartHop.
Data direction	Inbound from Namely to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Yes, for ChartHop Premium customers, via the **profiles** field category. Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Namely to ChartHop.

4.4.2.3.7.1. Synced data from Namely

The following table lists the default data set that is synced from Namely to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Namely field code
Base	base	members.pay, members.payBasis, members.nonUsEmployee
Birth Date	birthdate	members.dateOfBirth
City- Home Address	address.city	members.address.city
Country - Home Address	address.country	members.address.country
Currency	currency	members.pay, members.payBasis, members.nonUsEmployee
Department	department	members.department
Employment	employment	members.memberType
End Date	enddate	members.terminatedDate
Ethnicity	ethnicity	members.eeo1Race.value
First Name	name.last	members.name, members.firstName
Gender	gender	members.eeo1Gender.value
Home Email	contact.homeemail	members.emailAddresses.home
Home Phone	contact.homephone	members.phoneNumbers.home
Hourly	hourly	members.pay, members.payBasis, members.nonUsEmployee
Location	location	members.office
Manager	manager	members.manager.uuid
Mobile	contact.mobilephone	members.phoneNumbers.cell
Start Date	startdate	members.startDate

ChartHop field label	ChartHop field code	Namely field code
State - Home Address	address.state	members.address.state
Street 1 - Home Address	address.street1	members.address.street1
Street 2 - Home Address	address.street2	members.address.street2
Title	title	members.title
Work Email	contact.workemail	members.emailAddresses.work
Work Phone	contact.workphone	members.phoneNumbers.office
Zip/Postal - Home Address	address.postal	members.address.postal_code
Used to store profile photos	imageurl	members.photoUrl

4.4.2.3.7.2. Installing the Namely app

This section covers setting up the Namely integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for Namely

For ChartHop to access your organization's Namely payroll data, you need to create a Personal Access Token in Namely that you can use in ChartHop. This information allows ChartHop to connect to Namely to receive your employee data.

1. Log into Namely as an administrator who has permission to create API keys.
2. Navigate to API settings by selecting the Profile drop-down list and selecting **API**.
3. Select the **Personal Access Tokens** tab.
4. Create a personal access token and name it "ChartHop."
5. Copy the token to a safe place.
6. When accessing Namely, take note of the Namely subdomain name. In this URL example, acme.namely.com, **acme** is the subdomain.

Install the Namely app

After you have your Namely Personal Access Token and the Namely subdomain name, you can install the Namely integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.

2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Namely app

You'll be prompted to configure your payroll app when you select **Install**.

1. Enter your Namely subdomain in the field provided. In this URL example, acme.bamboohr.com, **acme** is the subdomain.
2. In the **Create your a personal access token** step, copy the personal access token you created to the provided field.
3. Select **Next step**.

Configure data sync settings for BambooHR

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.8. Paylocity

With the Paylocity app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes titles, contact information, demographics, compensation, managers, departments, and locations.

Paylocity at a glance

The following table summarizes ChartHop's Paylocity app.

Supported ChartHop packages	• Standard • Premium
Prerequisites	A ChartHop account with the Owner role and a Paylocity API key.
API key permissions	API key is required.ChartHop assistance is required for this app. Paylocity requires certain request forms to acquire API keys. Work with ChartHop's Professional Services team to request an API key from your Paylocity representative.
Data direction	Inbound from Paylocity to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	For Premium customers, additional field mapping is available for the **Employees** field category. Note that you cannot map Paylocity custom fields to ChartHop fields. Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Paylocity to ChartHop.

4.4.2.3.8.1. Synced data from Paylocity

The following table lists the default data set that is synced from Paylocity to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	Chart Hop field code	Paylocity field code
Base	base	profiles.primaryPayRate.payType, profiles.primaryPayRate.annualSalary, profiles.primaryPayRate.baseRate, profiles.currency, profiles.primaryPayRate.payRateNote, profiles.primaryPayRate.effectiveDate, profiles.__enablePayRateNoteAsCurrency
Birth Date	birthdate	profiles.birthDate
City - Home Address	address.city	profiles.homeAddress.city
Country - Home Address	address.country	profiles.homeAddress.country
Currency	currency	profiles.primaryPayRate.payType, profiles.primaryPayRate.annualSalary, profiles.primaryPayRate.baseRate, profiles.currency, profiles.primaryPayRate.payRateNote, profiles.primaryPayRate.effectiveDate, profiles.__enablePayRateNoteAsCurrency
Depart	depart	profiles.status.employeeStatus, profiles.status.changeReason
Department	contact.workphone	profiles.workAddress.phone
Department	department	profiles.departmentPosition, profiles.__enableCompanyPrefix, profiles.__deptCostCenter, profiles.companyId

ChartHop field label	Chart Hop field code	Paylocity field code
Employment	employment	profiles.departmentPosition.employeeType
End Date	enddate	profiles.status.effectiveDate, profiles.status.employeeStatus
Ethnicity	ethnicity	profiles.ethnicity
First Name	name.first	profiles.firstName
Gender	gender	profiles.gender
Home Email	contact.homeemail	profiles.homeAddress.emailAddress
Home Phone	contact.homephone	profiles.homeAddress.phone
Hourly	hourly	profiles.primaryPayRate.payType, profiles.primaryPayRate.annualSalary, profiles.primaryPayRate.baseRate, profiles.currency, profiles.primaryPayRate.payRateNote, profiles.primaryPayRate.effectiveDate, profiles.__enablePayRateNoteAsCurrency
Last Name	name.last	profiles.lastName
Location	location	profiles.workAddress.location, profiles.__enableEmptyRemote

ChartHop field label	Chart Hop field code	Paylocity field code
Manager	manager	profiles.departmentPosition.supervisorEmployeeId, profiles.departmentPosition.supervisorCompanyNumber, profiles.companyId
Middle Name	name.middle	profiles.middleName
Mobile	contact.mobilephone	profiles.homeAddress.mobilePhone
Preferred First Name	name.pref	profiles.preferredName
Start Date	startdate	profiles.status.hireDate, profiles.status.reHireDate, profiles.__isTransfer
State - Home Address	address.state	profiles.homeAddress.state
Street 1 - Home Address	address.street1	profiles.homeAddress.address1
Street 2 - Home Address	address.street2	profiles.homeAddress.address2
Team	team	profiles.departmentPosition, profiles.__enableCompanyPrefix, profiles.__deptCostCenter, profiles.companyId, profiles.__customTeamList, profiles.customDropDownFields, profiles.__teamCostCenter
Title	title	profiles.departmentPosition.jobTitle

ChartHop field label	Chart Hop field code	Paylocity field code
Work Email	contact.workemail	profiles.workAddress.emailAddress
Zip/Postal - Home Address	address.postal	profiles.homeAddress.postalCode
Used to store compensation information	compdate	profiles.primaryPayRate.payType, profiles.primaryPayRate.annualSalary, profiles.primaryPayRate.baseRate, profiles.currency, profiles.primaryPayRate.payRateNote, profiles.primaryPayRate.effectiveDate, profiles.__enablePayRateNoteAsCurrency
Used to store profile photos	image URL	profiles.profile_photo

4.4.2.3.8.2. Installing the Paylocity app

This section covers setting up the Paylocity integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for Paylocity

For ChartHop to access your organization's Paylocity payroll data, you need API credentials from your Paylocity representative. This information allows ChartHop to connect to Paylocity to receive your employee data.

Please work with your ChartHop representative to get your API credentials from Paylocity.

Gather additional Paylocity information

When you configure the Paylocity app, you'll be prompted for additional information from Paylocity. Be sure to have the following information handy.

- Determine which Paylocity cost centers align with the teams and departments you want to sync to ChartHop. You'll need to enter both a Department and Team cost center.
- If any of your team names in Paylocity are in custom fields (fields that are unique for your company), you'll need to enter those.

Install the Paylocity app

After you have your Paylocity API credentials, you can install the Paylocity integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Paylocity app

When you select install, you'll be prompted to walk through configuring your payroll app.

1. In the **Enter your API credentials** step, enter the following information that you received from your representative in the following order:
    - Client ID
    - Secret
    - Company ID
    - Public key XML
2. Select **Next step**.

Configure data sync settings for Paylocity

Before configuring app settings, you'll need to have the following settings from Paylocity to help determine how the Paylocity data will sync to ChartHop:

- Determine which Paylocity cost centers align with the teams and departments you want to sync to ChartHop. You'll need to enter both a Department and Team cost center.
- If any of your team names in Paylocity are in custom fields (fields that are unique for your company), you'll need to enter those.

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

1. For the **Backfill departures** step, select one of the two options:

- **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
- **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

2. For **Department cost center**, indicate what cost center to assign to ChartHop departments.
3. For **Team cost center**, indicate what cost center to assign to ChartHop teams.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.
3. When finished, select **Next step**.

Setting	Description
Include Company ID in cost center codes.	Choose to include your company ID in your cost center codes if you want the company ID to be part of the cost center code for reporting.
Currency	If you have set up currency overrides for employees in Paylocity, you can use those same settings in ChartHop and override your ChartHop currency settings. Select from the following: • **Use ChartHop settings for currency** to use ChartHop org settings to manage currencies for your organization. • **Use Paylocity pay rate note for currency** Select this option if you have set up currency overrides for employees in Paylocity.
Sync all changes made.	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Default location when not set	Define whether or not you want to set the location to Remote or leave it empty if it is not set in your payroll system.
Overwrite person fields	ChartHop recommends using this setting to avoid updating both ChartHop and your payroll system when a change is made to any field value synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. This means any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when

Setting	Description
	someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Include custom team fields.	List each custom team field separated by commas if you have customized your Paylocity team names.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.9. Rippling (licensed API only)

This app syncs your organizational roster from Rippling on a daily basis. The following information is included:

- Title, manager, department, location
- Hires and departures
- Personal contact and demographic information
- Compensation changes

Rippling at a glance

The following table summarizes ChartHop's Ripping app.

Supported ChartHop packages	• Standard • Premium
Prerequisites	A ChartHop account with the Technical Owner role and a Rippling account with Administrator permissions. Your Rippling account must include API access and the ability to create an API key.
API key permissions	Compensation data
Data direction	Inbound from Ripping to ChartHop
Sync cadence	Daily or as needed
Effective dating support	Only for the base comp field. Effective dating is not supported for other fields.
Additional field mapping support	For Premium customers, additional field mapping is available for the following Rippling field categories: • **Companies** • **Employeees** Please direct any custom mapping requests to your ChartHop implementation specialist.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Rippling to ChartHop.

Rippling customers who purchased API access

Rippling limits third-party access to their systems and may require some customers to pay for API access to connect their Rippling data to ChartHop. In addition, Rippling API keys may or may not include compensation data.

If your Rippling account includes API access with compensation data, contact your ChartHop implementation specialist to connect your Rippling data.

Rippling customers without API access

At ChartHop we're committed to fostering open data systems and choosing partners who are equally committed to maintaining an open, secure data ecosystem.

We regret that Rippling does not support an open data system; however, you can experience everything ChartHop has to offer by importing your Rippling data via a spreadsheet. **Learn more.**

4.4.2.3.9.1. Synced data from Rippling

The following table lists the default data set that is synced from Rippling to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Rippling field code
Base	base	employee.income.Unitemployee.income.amountemployee.income.currency
Birth Date	birthdate	individual.dob
City - Home Address	address.city	individual.residence.city
Country - Home Address	address.country	individual.residence.country
Currency	currency	employee.income.Unitemployee.income.amountemployee.income.currency
Department	department	employee.department.name
Employment	employment	employee.employment.subType
End Date	enddate	employee.end_Date, employee.is_active, employee.start_date
First Name	name.first	individual.first_name
Home Email	contact.homeemail	individual.emails
Home Phone	contact.homephone	individual.phone_numbers
Hourly	hourly	employee.income.Unitemployee.income.amountemployee.income.currency
Last Name	name.last	individual.last_name
Location	location	employee.location_city
Manager	manager	employee.manager.id
Mobile	contact.mobilephone	individual.phone_numbers
Start Date	startdate	employee.start_date

ChartHop field label	ChartHop field code	Rippling field code
State - Home Address	address.state	individual.residence.state
Street 1 - Home Address	address.street 1	individual.residence.line1
Street 2 - Home Address	address.street 2	individual.residence.line2
Title	title	employee.title
Work Email	contact.workemail	individual.emails
Work phone	contact.workphone	individual.phone_numbers
Zip/Postal - Home Address	address.postal	individual.residence.postal_code

4.4.2.3.9.2. Installing the Rippling app

This section covers setting up the Rippling integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Setting up the Rippling payroll app

If your Rippling account includes API access and you'd like to use ChartHop's Rippling app to connect your Rippling data to ChartHop, please contact your ChartHop implementation specialist for assistance at **implementation@charthop.com**.

Install the Rippling app

After you have Rippling account API access, you can install the Workday integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Configure data sync settings for Rippling

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in

ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

Automatically create backfills - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.
3. When finished, select **Next step**.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an employee. • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
	Generally, the company ID should be left blank unless otherwise informed by your ChartHop Customer Success team.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.10. Sapling Onboarding from Kallidus

With the Sapling Onboarding from Kallidus app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes job title, manager, department, location, hires and departures, contact information and demographics, compensation changes, and time off.

Sapling at a glance

The following table summarizes ChartHop's Sapling Onboarding from Kallidus app.

Supported ChartHop packages	• Basic • Standard • Premium
Supported Sapling packages	• Onboarding • People Ops Platform • Learning and Performance
Prerequisites	A Sapling account with administrator privileges and a ChartHop account with the Owner role.
API key permissions	As a Sapling administrator, create an API key and save it in ChartHop.
Data direction	Inbound from Sapling to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Yes, for ChartHop Premium customers, through the profiles field category. See **Sapling's documentation**. Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Sapling Onboarding from Kallidus to ChartHop.

4.4.2.3.10.1. Synced data from Sapling Onboarding from Kallidus

The following table lists the default data set that is synced from Sapling to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Sapling source field
Base	base	profiles.base_salary.currency_value, profiles.base_salary.currency_type, profiles.pay_rate.currency_value, profiles.pay_rate.currency_type, profiles.rate_type
Birth Date	birthdate	profiles.date_of_birth
City - Home Address	address.city	profiles.home_address.city
Country - Home Address	address.country	profiles.home_address.country
Currency	currency	profiles.base_salary.currency_value, profiles.base_salary.currency_type, profiles.pay_rate.currency_value, profiles.pay_rate.currency_type, profiles.rate_type
Depart	depart	profiles.termination_type
Department	department	profiles.department
Employement	employment	profiles.employment_status
End Date	enddate	profiles.termination_date
Ethnicity	ethnicity	profiles.race_ethnicity, profiles.race_ethnicity_please_select_all_that_apply
First Name	name.first	profiles.first_name
Gender	gender	profiles.gender, profiles.gender_identity
Home Email	contact.homeem	profiles.personal_email

ChartHop field label	ChartHop field code	Sapling source field
	ail	
Home Phone	contact.homephone	profiles.home_phone_number.country, profiles.home_phone_number.area_code, profiles.home_phone_number.phone
Hourly	hourly	profiles.base_salary.currency_value, profiles.base_salary.currency_type, profiles.pay_rate.currency_value, profiles.pay_rate.currency_type, profiles.rate_type
Last Name	name.last	profiles.last_name
Location	location	profiles.location
Manager	manager	profiles.manager
Middle Name	name.middle	profiles.middle_name
Mobile	contact.mobilephone	profiles.mobile_phone_number.country, profiles.mobile_phone_number.area_code, profiles.mobile_phone_number.phone
Preferred First Name	name.pref	profiles.preferred_name
Start Date	startdate	profiles.start_date
State - Home Address	address.state	profiles.home_address.state
Street 1 - Home Address	address.street1	profiles.home_address.line1
Street 2 - Home	address.street2	profiles.home_address.line2

ChartHop field label	ChartHop field code	Sapling source field
Address		
Title	title	profiles.job_title
Work Email	contact.workemail	profiles.company_email
Zip/Postal - Home Address	address.postal	profiles.home_address.zip
Used to store profile photos	imageurl	profiles.profile_photo

4.4.2.3.10.2. Installing the Sapling Onboarding from Kallidus app

This section covers setting up the Sapling Onboarding from Kallidus integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for Sapling Onboarding from Kallidus

For ChartHop to access your organization's Sapling payroll data, you need to create an API key in Sapling that you can use in ChartHop. This information allows ChartHop to connect to Sapling to receive your employee data.

1. Log onto Sapling as a user with administrator permissions.
2. In Sapling, go to the Integrations page.
3. From there, go to **API keys**.
4. Choose **Create New Key**.
5. Name the API key "**ChartHop**".
6. Copy the API key to a safe place.
7. When accessing Sapling, take note of the Sapling subdomain name. In this URL example, acme.sapling.com, **acme** is the subdomain.

Install the Sapling app

After you have your Sapling API key, you can install the Sapling integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Sapling app

You'll be prompted to configure your payroll app when you select **Install**.

1. Enter your Sapling subdomain in the field provided. In this URL example, acme.sapling.com, **acme** is the subdomain.
2. In the **Create your API key** step, copy the API key you created to the provided field.
3. Select **Next step**.

Configure data sync settings for Sapling

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.11. Sequoia One

With the Sequoia One app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes job title, manager, department, location, hires and departures, contact information and demographics, compensation changes, and time off.

Sequoia One at a glance

The following table summarizes ChartHop's Sequoia One app.

Supported ChartHop packages	• Standard • Premium
Prerequisites	A Sequoia One account that has access to the Admin Center and a ChartHop account with the Owner role.
API key permissions	Contact your HRBP to turn on this integration in HRX.
Data direction	Inbound from Sequoia One to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Please direct all custom mapping requests to ChartHop's Professional Services team.
How to install	See ChartHop's **install guidelines** or view detailed instructions on the ChartHop app install page.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Supported products	Sequioia One
Synced Data	The default **synced data** from Sequoia One to ChartHop.

4.4.2.3.11.1. Synced data from Sequoia One

Once the Sequoia One payroll app has been properly set up, ChartHop will be able to pull Sequoia One data into your ChartHop account.

The table below lists all fields that are synced from Sequoia One to ChartHop during a sync. In the first column, we list the name of the field in ChartHop, and in the second column, we list the name of the field in Sequoia One.

ChartHop field	Sequoia One field
`address.street1, address.city, address.state, address.country`	`employee.home_address`
`birthdate`	`employee.birth_date`
`contact.homeemail`	`employee.email`
`contact.homephone, contact.mobilephone`	`employee.contact_info`
`contact.workemail`	`employee.work_email`
`department`	`employee.home_department`
`employment`	`employee.employment_type`
`ethnicity`	`employee.ethnicity`
`ethnicity`	`employee.ethnicity`
`gender`	`employee.gender`
`hourly, base`	`employee.compensation`
`location`	`employee.home_location`
`manager`	`employee.reports_to`
`name.first, name.middle, name.last, name.pref`	`employee.full_name`
`startdate`	`employee.hire_date`
`title`	`employee.employee_title`
`type, enddate`	`employee.termination_date`

4.4.2.3.11.2. Installing the Sequoia One app

The Sequoia One app will sync your organizational roster from Sequoia One automatically on a daily basis.

Connecting ChartHop to Sequoia One

To get started, you will need to work closely with your Sequoia One HRBP. Contact your HRBP to turn on this integration in HRX.

Please do not change any of the settings on this sync. Reach out to your Sequoia HRBP or COM for help.

Once this integration has been enabled in HRX, follow the steps below.

1. Sign into the Sequoia One customer portal (HRX)
2. Locate and click on the ChartHop widget
3. ChartHop will open in a new tab
4. You will be automatically signed into ChartHop

Please don't hesitate to contact **implementation@charthop.com** if you need assistance.

Running a single, on-demand sync from Sequoia One

Any ChartHop user with sufficient permissions can trigger an on-demand sync from Sequoia One at any time. To sync your data for the first time, or subsequently on-demand at any time, follow the steps below.

1. Open **ChartHop**.
2. Select the gear icon.
3. Select **Apps and Integrations**.
4. Find and select Sequoia One.
5. Scroll down to the bottom of the page, and click on **Sync To Primary**.

Upon clicking Sync to Primary, ChartHop will pull all of your org's historic and current employee data from Sequoia One. Once completed, you will see a message indicating that the sync has been completed.

Permissions

To sync your Sequoia One data into ChartHop, your ChartHop user must have an access level of at least a Technical Owner. If you are not a Technical Owner and believe you should be, please contact support@charthop.com.

Running a daily, automated sync from Sequoia One

Any ChartHop user with sufficient permissions can set up an automated sync from Sequoia One at any time. To set up an automated sync, follow the steps below.

1. Open **ChartHop**.
2. Select the gear icon.
3. Select **Apps and Integrations**.
4. Find and select Sequoia One.
5. Scroll down to the bottom of the page, and click on **Run Daily**.
6. Click **Save Settings** when you are done.

4.4.2.3.12. SuccessFactors

With the SuccessFactors app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes contact information, demographics, compensation, managers, departments, and locations.

SuccessFactors at a glance

The following table summarizes ChartHop's SuccessFactors app.

Supported ChartHop packages	• Standard • Premium
Prerequisites	A SuccessFactors Sync account that has access to the Admin Center and a ChartHop account with the Owner role.
API key permissions	As a SucessFactors administrator, create a new user and then do the following: • Assign Employee Central API permissions • Create a permission group for the API user • Grant the Permissions role to the permission group • Set a password expiration for the user
Data direction	Inbound from SuccessFactors to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Yes, for ChartHop Premium customers, through the following field categories: • User • PerAddress • PerPersonal • EmpJob • EmpPayCompRecurring • EmployeeTime • EmpCompensation For more information, see the **SuccessFactors documentation**. Please direct all custom mapping requests to ChartHop's Professional Services team.
How to install	See ChartHop's **install guidelines** or view detailed instructions on the ChartHop app install page.

Supported ChartHop packages	• Standard • Premium
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Supported products	SucessFactors
Synced Data	The default **synced data** from SuccessFactors to ChartHop.

4.4.2.3.12.1. Synced data from SuccessFactors

The table below lists the default data set that is synced from SuccessFactors to ChartHop.

ChartHop Premium: You can work with ChartHop implementation services to customize what is synced.

ChartField field label	Charthop field code	SuccessFactors field code
Birth Date	birthdate	User.dateOfBirth
City - Home Address	address.city	PerAddressDEFLT.city
Country - Home Address	address.country	PerAddressDEFLT.country
Currency (Deprecated)	currency	EmpPayCompRecurring.currencyCode
Date	date	EmpJob.startDate
Date	date	EmpPayCompRecurring.startDate, EmployeeTime.createdDateTime
Depart	depart	EmpJob.eventReason
Department	department	EmpJob.department
Employment	employment	EmpJob.eventReason
Ethnicity	ethnicity	User.ethnicity
Fax	contact.workfax	User.fax
First Name	name.last	User.lastName
Gender	gender	PerPersonal.gender
Home Phone	contact.homephone	User.homePhone
Last Name	name.first	User.firstName
Location	location	EmpJob.location
Manager	manager	EmpJob.managerId
Middle Name	name.middle	User.mi
Mobile	contact.mobilephone	User.cellPhone

ChartField field label	Charthop field code	SuccessFactors field code
Preferred First Name	name.pref	User.nickname
Promotion	promotion	EmpJob.eventReason
State - Home Address	address.state	PerAddressDEFLT.externalCode
Street 1 - Home Address	address.street1	PerAddressDEFLT.address1
Street 2 - Home Address	address.street2	PerAddressDEFLT.address2
Street 3 - Home Address	address.street3	PerAddressDEFLT.address3
Team	team	User.division
Title	title	EmpJob.jobTitle
Work email	contact.workemail	User.email
Work phone	contact.workphone	User.businessPhone
Zip/Postal - Home Address	address.postal	PerAddressDEFLT.zipCode
Used to store compensation information	type	EmpJob.eventReason
Used to store compensation information	base, hours, hourly, variable, variabletype, variablepct	EmpPayCompRecurring.payComponent, EmpPayCompRecurring.paycompvalue, EmpPayCompRecurring.frequency, EmpJob.standardHours, EmpJob.fte

ChartField field label	Charthop field code	SuccessFactors field code
Used to store profile photos	imageurl	Photo.id
Used to store time off information	timeoff.id	EmployeeTime.externalCode
Used to store time off information	timeoff.type	EmployeeTime.timeType
Used to store time off information	timeoff.startdate	EmployeeTime.startDate
Used to store time off information	timeoff.enddate	EmployeeTime.endDate
Used to store time off information	timeoff.approval	EmployeeTime.approvalStatus
Used to store time off information	timeoff.hours	EmployeeTime.quantityInHours
Used to store time off information	timeoff.days	EmployeeTime.quantityInDays
Used to store time off information	timeoff.note	EmployeeTime.comment

4.4.2.3.13. TriNet

With the TriNet app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes contact information, demographics, compensation, managers, departments, and locations.

TriNet at a glance

The following table summarizes ChartHop's TriNet app.

Supported ChartHop packages	• Standard • Premium
Prerequisites	A ChartHop account with the Owner role and a Trinet API key.
API key permissions	As a TriNet Integration Administrator, create an API key using the steps provided in the Integration Center.
Data direction	Inbound from Trinet to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	For Premium customers, additional field mapping is available for the following Trinet field categories: • **Employees** • **Time off calendar** Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from TriNet to ChartHop.

4.4.2.3.13.1. Synced data from TriNet

The table below lists the default data set that is synced from TriNet to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Trinet field code
Base	base	employees.payInfo.compFrequency, employees.payInfo.compRate
Birth Date	birthdate	employees.bioInfo.birthdate
City - Home Address	address.city	employees.homeAddress.city
Country - Home Address	address.country	employees.homeAddress.country
Date	date	employees.employmentInfo.serviceDate
Department	department	employees.employmentInfo.department.deptName
Employment	employment	employees.employmentInfo.employeeType
End Date	enddate	employees.employmentInfo.terminationDate
Ethnicity	ethnicity	employees.bioInfo.ethnicity
First Name	name.first	employees.names[?(@.nameType == 'PRI')].firstName.first()
Gender	gender	employees.bioInfo.gender
Hourly	hourly	employees.payInfo.compFrequency, employees.payInfo.compRate
Last Name	name.last	employees.names[?(@.nameType == 'PRI')].lastName.first()
Location	location	employees.employmentInfo.location.locationName
Manager	manager	employees.employmentInfo.supervisor.supervisorId
Middle Name	name.middle	employees.names[?(@.nameType == 'PRI')].middleName.first()
Preferred First Name	name.pref	employees.names[?(@.nameType == 'PRF')].firstName.first()

ChartHop field label	ChartHop field code	Trinet field code
Start Date	startdate	employees.employmentInfo.serviceDate
State - Home Address	address.state	employees.homeAddress.state
Street 1 - Home Address	address.street1	employees.homeAddress.address1
Street 2 - Home Address	address.street2	employees.homeAddress.address2
Title	title	employees.employmentInfo.businessTitle
Work Email	contact.workemail	employees.employmentInfo.workEmail
Work Phone	contact.workphone	employees.employmentInfo.workPhone
Zip/Postal - Home Address	address.postal	employees.homeAddress.postalCode
Used to store time off information	timeoff.approval	timeoffCalendar.status
Used to store time off information	timeoff.days	timeoffCalendar.date
Used to store time off information	timeoff.enddate	timeoffCalendar.date
Used to store time off information	timeoff.hours	timeoffCalendar.hours
Used to store time off information	timeoff.id	timeoffCalendar.employeeId, timeoffCalendar.date
Used to store time off information	timeoff.startdate	timeoffCalendar.date
Used to store time off information	timeoff.type	timeoffCalendar.type

4.4.2.3.13.2. Installing the TriNet app

This section covers setting up the TriNet integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for TriNet

For ChartHop to access your organization's TriNet payroll data, you need to obtain an API Client ID, Client Secret, and Company ID as an Integration Administrator. This information allows ChartHop to connect to TriNet to receive your employee data.

1. Sign in to TriNet
2. Navigate to the TriNet Integration Center
3. Select **Get Started** from the **TriNet API** section.
4. Select the applicable integration name from the **Select an Integration** drop-down menu and review the level of access being granted to the API Key before selecting **Accept**.
5. Copy the **Company ID**, **Client ID**, and **Client Secret**.
    - Be sure to copy these IDs in a safe place before navigating off this page as it will not be accessible again.
6. Select **Ok** when you've copied your API IDs and secret.

Note that you can revoke access at anytime by selecting **Disconnect** from within **My Connected Apps**. You can also generate a new API key and secret by disconnecting and

repeating steps 1-5.

Install the TriNet app

After you have your TriNet API credentials, you can install the TriNet integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the TriNet app

You'll be prompted to configure your payroll app when you select **Install**.

1. In the **Enter your API credentials** step, enter the following information that you received from your TriNet representative in the following order:
    - Client ID
    - Client Secret
    - Company ID
2. Select **Next step**.

Configure data sync settings for TriNet

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.14. Ultipro (UKG Pro)

With the Ultipro app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes contact information, demographics, compensation, managers, departments, and locations.

Ultipro at a glance

The following table summarizes ChartHop's Ultipro app.

Supported ChartHop packages	• Standard • Premium
Supported Ultipro package	UKG Pro
Prerequisites	A ChartHop account with the Owner role and an Ultipro Service Account.
API key permissions	Grant your Ultipro Service Account the following view options: • Personnel integration • Employee Job History Details • Employee Person Details • Employee Compensation Details • Company Configuration Integration
Data direction	Inbound from Ultipro to ChartHop
Sync cadence	Daily or as needed
Effective dating support	Yes
Additional field mapping support	Yes, for ChartHop Premium customers, from the following field categories: • **person-details** • **pfcEmployment** • **user-defined-fields** • **employee-job-history-details** • **employment-details** • **compensation-details** Please direct all custom mapping requests to ChartHop's Professional Services team.
How to install	See ChartHop's **install guidelines** or view detailed instructions on the ChartHop app install page.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.

Supported ChartHop packages	• Standard • Premium
Synced Data	The default **synced data** from Ultipro to ChartHop.

4.4.2.3.14.1. Synced data from Ultipro

The table below lists the default data set that is synced from Ultipro to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

Fields list

ChartHop field label	Chart Hop field code	Ultipro field code
Birth Date	birthdate	person-details.dateOfBirth
City - Home Address	address.city	person-details.addressCity
Country - Home Address	address.country	person-details.addressCountry
Date	date	employee-job-history-details.jobEffectiveDate
Department	department	employment-details.orgLevel1Code, employee-job-history-details.orgLevel1Code, employment-details.fullTimeOrPartTimeCode, employee-job-history-details.fullTimeOrPartTime
End Date	enddate	employment-details.dateOfTermination
Ethnicity	ethnicity	person-details.ethnicDescription
First Name	name.first	person-details.firstName
Gender	gender	person-details.gender
Home email	contact.homeemail	person-details.emailAddressAlternate
Home Phone	contact.homephone	person-details.homePhone
Last Name	name.last	person-details.lastName

ChartHop field label	Chart Hop field code	Ultipro field code
Location	location	employment-details.primaryWorkLocationCode, employee-job-history-details.locationCode
Manager	manager	employment-details.supervisorID, employee-job-history-details.supervisorId
Middle Name	name.middle	person-details.middleName
Preferred First Name	name.pref	person-details.preferredName
Promotion	promotion	employee-job-history-details.isPromotion
Start Date	startdate	employment-details.lastHireDate
State - Home Address	address.state	person-details.addressState
Street 1 - Home Address	address.street1	person-details.addressLine1
Street 2 - Home Address	address.street2	person-details.addressLine2
Street 3 - Home Address	address.street3	person-details.addressLine3
Title	title	employment-details.jobDescription, employee-job-history-details.jobDescription, employee-job-history-details.hourlyPayRate

ChartHop field label	Chart Hop field code	Ultipro field code
Work email	contact.workemail	person-details.emailAddress
Zip/Postal - Home Address	address.postal	person-details.addressZipCode
See Hourly compensation rate calculations and Comp Transform below	hours	employee-job-history-details.salaryOrHourly, employee-job-history-details.annualSalary
Used to store compensation information	type	employment-details.employeeStatusCode, employee-job-history-details.jobChangeReasonCode, employee-job-history-details.employeeStatus, employee-job-history-details.reasonCode

Hourly compensation rate calculations

The hourly field defaults to 40.0 (hours) but is derived in the following ways:

- `weeks = annualSalary / weeklyPayRate`
- `hours = annualSalary / hourlyPayRate / weeks`

This assumes hours are derived per week from a base salary and a scaled hours per day and weeks per year figure against the defaults of 52 weeks per year and 40 hours per week.

Hourly workers, from UKG get an annualized salary, an amount paid weekly, and an amount paid hourly. For example, if an employee has `annualSalary=50,000`, `weeklyPayRate=1000` and `hourlyPayRate=20`, the calculations become:

- `weeks = 50000 / 1000 = 50`

- `hours = 50000 / 20 / 50 = 50`

Using the example above, the employee makes $50,000 a year by working 50, 50-hour weeks at $20 an hour. Said another way, they make $1000 a week for each of the 50 weeks they work, because they work 50 hours per week and 50 * 20 = 1000.

4.4.2.3.14.2. Installing the Ultipro app

This section covers setting up the Ultipro integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Create an Ultipro User account

Before you can install the Ultipro app, you need to create an Ultipro user account and enable some specific permissions. Link your Ultipro user account to the Ultipro app in ChartHop using your created login credentials when you install the app.

To create an Ultipro user account:

1. Login to Ultipro, and navigate to **System Configuration**.
2. Select **Service Account Administration**.
3. Select **Add**.
4. Enter a Username, Password, and Email for for the account
5. Select the Web Service permissions and enable view permissions for the following options:
    - compensation-details
    - person-details
    - employee-job-history-details
    - Employee/User-defined fields

    - Personnel Integration
6. Select **Save**.

Copy an Ultipro Customer API key

For ChartHop to access your organization's Ultipro payroll data, you need to use your Ultipro **Customer API key**. The key is automatically created when you create your Ultipro user account and configure your **Service Account Administration** settings.

To access your Ultipro API key:

1. In Ultipro, navigate to **Service Account Administration**.
2. Copy the **Customer API key**.

Create an Ultipro domain/service host name

You need the domain/service host name when you install the Ultipro app in ChartHop.

To access your Ultipro domain/server host name:

1. In Ultipro, select **Menu**.
2. Select **System Configuration**.
3. Select **Security**.
4. From the **Web Services** page, copy the **Domain/Service Host Name** in the following format:
    - `service$.ultipro.com` (where $ is a numeric value).

Install the Ultipro app

After you have your Ultipro Customer API key and service account administration credentials, you can install the Ultipro integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Ultipro app

When you select **Install**, you'll be prompted to walk through configuring your payroll app.

1. Enter your **Service Account Username** and **Service Account Password** in the provided fields.
2. Paste your Ultipro **Customer API key** to the provided field.
3. Paste your **Domain/Service Host Name** to the provided field.
4. Select **Next step**.

Configure data sync settings for Ultipro

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.
3. When finished, select **Next step**.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an employee. • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
	Generally, the company ID should be left blank unless otherwise informed by your ChartHop Customer Success team.
Job change history	When importing job data into ChartHop, include changes within the specified period.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.15. Workday

With the Workday app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes contact information, demographics, compensation, managers, departments, and locations.

ChartHop can also import information via **Workday Reports**.

Workday at a glance

The following table summarizes ChartHop's Workday app.

Supported ChartHop packages	• Standard • Premium
Supported Workday package	HCM
Prerequisites	A ChartHop account with the Owner role and a Workday account with administrator privileges.
API key permissions	In Workday, create an Integration System User (ISU) and ensure that the new user has read access to all Human_Resources SOAP APIs.
Data direction	Inbound from Workday to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Yes, for ChartHop Premium customers, through the **profile** field category. Please direct all custom mapping requests to ChartHop's Professional Services team.
How to install	See ChartHop's **install guidelines** or view detailed instructions on the ChartHop app install page.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Workday to ChartHop.

Workday ATS

Along with payroll, the Workday app also features its own built in ATS that syncs open jobs data between ChartHop and Workday.

4.4.2.3.15.1. Synced data from Workday

The following table lists the default data set that is synced from Workday to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field code	ChartHop field code	Workday field code
Band	band	profiles.wd:Worker_Data
Base (Deprecated)	base	profiles.wd:Worker_Data
Birth Date	birthdate	profiles.wd:Worker_Data.wd:Personal_Data.wd:Birth_Date
City - Home Address	address.city	profiles.wd:Worker_Data
Country - Home Address	address.country	profiles.wd:Worker_Data
Currency (Deprecated)	currency	profiles.wd:Worker_Data
Depart	depart	profiles.wd:Worker_Data
Department	department	profiles.wd:Worker_Data
Employment	employment	profiles.wd:Worker_Data
End Date	enddate	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:End_Date
Ethnicity	ethnicity	profiles.wd:Worker_Data
Fax	contact.workfax	profiles.wd:Worker_Data
First Name	name.first	profiles.wd:Worker_Data.wd:Personal_Data.wd:Name_Data.wd:Legal_Name_Data.wd:Name_Detail_Data.wd:First_Name
Gender	gender	profiles.wd:Worker_Data
Home email	contact.homeemail	profiles.wd:Worker_Data

ChartHop field code	ChartHop field code	Workday field code
Home Phone	contact.homephone	profiles.wd:Worker_Data
Hourly compensation (Deprecated)	hourly	profiles.wd:Worker_Data
Last Name	name.last	profiles.wd:Worker_Data.wd:Personal_Data.wd:Name_Data.wd:Legal_Name_Data.wd:Name_Detail_Data.wd:Last_Name
Location	location	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:Business_Site_Summary_Data.wd:Name
Manager	manager	profiles.wd:Worker_Data
Mobile	contact.mobilephone	profiles.wd:Worker_Data
Preferred First Name	name.pref	profiles.wd:Worker_Data.wd:Personal_Data.wd:Name_Data.wd:Preferred_Name_Data.wd:Name_Detail_Data.wd:First_Name
Start Date	startdate	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:Start_Date
State - Home Address	address.state	profiles.wd:Worker_Data
Street 1 - Home Address	address.street1	profiles.wd:Worker_Data
Street 2 - Home Address	address.street2	profiles.wd:Worker_Data

ChartHop field code	ChartHop field code	Workday field code
Street 3 - Home Address	address.street3	profiles.wd:Worker_Data
Title	title	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:Business_Title
Variable	variable	profiles.wd:Worker_Data
Variable Type (Deprecated)	variabletype	profiles.wd:Worker_Data
Work email	contact.workemail	profiles.wd:Worker_Data
Work phone	contact.workphone	profiles.wd:Worker_Data
Zip/Postal - Home Address	address.postal	profiles.wd:Worker_Data
Used to store compensation information	variableplct	profiles.wd:Worker_Data
Used to store compensation information	compdate	profiles.wd:Worker_Data

ChartHop field code	ChartHop field code	Workday field code
Band	band	profiles.wd:Worker_Data
Base (Deprecated)	base	profiles.wd:Worker_Data
Birth Date	birthdate	profiles.wd:Worker_Data.wd:Personal_Data.wd:Birth_Date
City - Home Address	address.city	profiles.wd:Worker_Data
Country - Home Address	address.country	profiles.wd:Worker_Data
Currency (Deprecated)	currency	profiles.wd:Worker_Data
Depart	depart	profiles.wd:Worker_Data
Department	department	profiles.wd:Worker_Data
Employment	employment	profiles.wd:Worker_Data
End Date	enddate	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:End_Date
Ethnicity	ethnicity	profiles.wd:Worker_Data
Fax	contact.workfax	profiles.wd:Worker_Data
First Name	name.first	profiles.wd:Worker_Data.wd:Personal_Data.wd:Name_Data.wd:Legal_Name_Data.wd:Name_Detail_Data.wd:First_Name
Gender	gender	profiles.wd:Worker_Data
Home email	contact.homeemail	profiles.wd:Worker_Data

ChartHop field code	ChartHop field code	Workday field code
Home Phone	contact.homephone	profiles.wd:Worker_Data
Hourly compensation (Deprecated)	hourly	profiles.wd:Worker_Data
Last Name	name.last	profiles.wd:Worker_Data.wd:Personal_Data.wd:Name_Data.wd:Legal_Name_Data.wd:Name_Detail_Data.wd:Last_Name
Location	location	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:Business_Site_Summary_Data.wd:Name
Manager	manager	profiles.wd:Worker_Data
Mobile	contact.mobilephone	profiles.wd:Worker_Data
Preferred First Name	name.preff	profiles.wd:Worker_Data.wd:Personal_Data.wd:Name_Data.wd:Preferred_Name_Data.wd:Name_Detail_Data.wd:First_Name
Start Date	startdate	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:Start_Date
State - Home Address	address.state	profiles.wd:Worker_Data
Street 1 - Home Address	address.street1	profiles.wd:Worker_Data
Street 2 - Home Address	address.street2	profiles.wd:Worker_Data

ChartHop field code	ChartHop field code	Workday field code
Street 3 - Home Address	address.street3	profiles.wd:Worker_Data
Title	title	profiles.wd:Worker_Data.wd:Employment_Data.wd:Worker_Job_Data.wd:Position_Data.wd:Business_Title
Variable	variable	profiles.wd:Worker_Data
Variable Type (Deprecated)	variabletype	profiles.wd:Worker_Data
Work email	contact.workemail	profiles.wd:Worker_Data
Work phone	contact.workphone	profiles.wd:Worker_Data
Zip/Postal - Home Address	address.postal	profiles.wd:Worker_Data
Used to store compensation information	variableplct	profiles.wd:Worker_Data
Used to store compensation information	compdate	profiles.wd:Worker_Data

4.4.2.3.15.2. Installing the Workday app

This section covers setting up the Workday integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain your Workday instance URL and name

Before you can install the Workday app, you need to obtain a Workday instance URL and name from your Workday representative. This information allows ChartHop to connect to Workday to receive your employee data.

Create an Integration System User

After you obtain your Workday instance URL and name, you need to create an **Integration System User** and enable specific permissions. This will allow ChartHop to connect to Workday via your Workday instance's API.

To create a Workday **Integration System User**:

1. Login to Workday, and create an **Integration System User (ISU)**.
2. Ensure that the user has **read access** to all **Human_Resources SOAP APIs**.

Install the Workday app

After you have your Workday instance name and URL , and have created your Integration System User, you can install the Workday integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Workday app

When you select **Install**, you'll be prompted to walk through configuring the payroll app.

1. Enter your **Base URL** and **Instance name** in the provided fields.
2. Enter your **Instance System User** name and password in the provided fields.

Configure data sync settings for Workday

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.
3. When finished, select **Next step**.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an employee. • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Setting	Description
	Generally, the company ID should be left blank unless otherwise informed by your ChartHop Customer Success team.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.15.3. Workday ATS

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

Along with payroll data, the Workday app also features its own ATS that syncs open jobs data between ChartHop and Workday.

Workday ATS default field mappings

The Workday ATS app supports the following default field mappings listed in the table below:

ChartHop field label	Workday field code
Workday Req ID and Req	wd:Position_Data.wd:Position_Definition_Data.wd:Position_ID
Title	wd:Position_Data.wd:Position_Definition_Data.wd:Job_Posting_Title
Department	wd:Organization_Data.wd:Name
Location	wd:Organization_Data.wd:Supervisory_Data.wd:Location_Reference.wd:ID
Manager and Hiring Manager	wd:Organization_Data.wd:Manager_Reference.wd:ID

Workday ATS additional field mappings

The Workday ATS app supports additional field mappings for the following fields, which are known as *Operations* in Workday:

Operation name	Description
Staffing/Get_Position	Returns information for position management positions. If a position is filled, it identifies the worker filling the position. This operation is specified via `wd:Position_Data` in the field mappers.
Staffing/Get_Organizations	Returns organization information for a type of organization. If the request does not specify an organization, the operation returns information for all organizations. This operation is specified via `wd:Organization_Data` in the field mappers.

Requirements for additional field mapping

When mapping additional Workday fields, you need to consider the type of field you are mapping. Most Workday fields are stored as objects and need additional formatting when creating the mappings. To reference the path for additional mappings, for each parameter that is an object type, you need to specify the nested end parameter within the object:

Example path - `wd:Position_Data.wd:Position_Definition_Data.wd:Job_Posting_Title`

Using the above example, to pull *Title*, you would start with *Position_Data* (as this is under the Staffing/Get_Position operation), followed by *Position_Definition_Data* and ending with *Job_Posting_Title*. This final parameter (Job_Posting_Title) is a string and is pulled in as the field value.

> Note that when creating a nested path, you must add `wd` before the first parameter in the path, followed by a `.wd` for each additional parameter in the nested path.

4.4.2.3.15.4. Workday Reports

Workday Reports can be imported using the separate app Workday Reports App in ChartHop. Install the Workday Reports app and follow the instructions to set it up.

Prerequisites:

1. Access to a **Workday Reports URL**
2. Ability to create an **Integration System User (ISU)** in Workday.

Installation Instructions:

1. Sign in

- Sign in to Workday Reports using your company's login page.
- For help finding the correct URL, please reach out to your company's HR or IT department.

2. Enter your Workday Reports URL

- In Workday Reports, find your report URL – e.g. **https://wd5-services1.myworkday.com**.

3. Create an Integration System User

- In Workday, create an **Integration System User (ISU)**.
- Ensure that the new user has **read access** to all fields contained within the newly created report. If calculated fields are included, allow access to all fields within the calculations.
- Enter the **username** and **password**

4. Configure settings

- **Backfill departures** — When syncing departures, choose whether or not to automatically create backfills in ChartHop.

- **Missing location information** — If location is not set for an open role in Workday Reports
- **Overwrite person fields** — Workday Reports will overwrite the values in ChartHop for person fields, such as gender, birthdate, home address, etc. This can pose an issue when an employee has elected to update their person fields in ChartHop, without requesting an update in Workday Reports.
- Exclude Workday IDs — IDs of people to exclude

4.4.2.3.16. Zenefits

With the Zenefits app, you can sync your payroll data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes contact information, demographics, compensation, managers, departments, and locations.

Zenefits at a glance

The following table summarizes ChartHop's Zenefits app.

Supported ChartHop packages	• Basic • Standard • Premium
Supported Zenefits package	• Essentials • Growth Zen
Prerequisites	A ChartHop account with the Owner role and a Zenefits account with Admin privileges.
API key permissions	From Zenefits, in Custom integrations, add a token and grant it the following scopes: • employment • personal data
Data direction	Inbound from Zenefits to ChartHop
Sync cadence	Daily or as needed
Effective dating support	Yes
Additional field mapping support	Yes, for ChartHop Premium customers, through the following field categories: • profiles • custom For more information, see the **Zenefits documentation**. Please direct all custom mapping requests to ChartHop's Professional Services team.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.
Synced Data	The default **synced data** from Zenefits to ChartHop.

4.4.2.3.16.1. Synced data from Zenefits

The following table lists the default data set that is synced from Zenefits to ChartHop.

ChartHop customers can work with ChartHop implementation services to customize what is synced.

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

ChartHop field label	ChartHop field code	Zenefits field code
City - Home Address	address.city	profiles.city
Country - Home Address	address.country	profiles.country
Zip/Postal - Home Address	address.postal	profiles.postal_code
State - Home Address	address.state	profiles.state
Street 1 - Home Address	address.street1	profiles.street1
Street 2 - Home Address	address.street2	profiles.street2
Birth Date	birthdate	profiles.date_of_birth
Home email	contact.homeemail	profiles.personal_email
Mobile	contact.mobilephone	profiles.personal_phone
Work email	contact.workemail	profiles.work_email
Work phone	contact.workphone	profiles.work_phone
Date	date	timeOff.created_date
Depart	depart	profiles.employments.data[0].termination_type
Department	department	profiles.department.url, departments.ids
Employment	employment	profiles.employments.data[0].employment_type

ChartHop field label	ChartHop field code	Zenefits field code
Gender	gender	profiles.gender
	imageurl	profiles.photo_url
Location	location	profiles.location.url, locations.ids
Manager	manager	profiles.manager.url
First Name	name.first	profiles.first_name
Last Name	name.last	profiles.last_name
Middle Name	name.middle	profiles.middle_name
Preferred First Name	name.pref	profiles.preferred_name
Title	title	profiles.title
Used to calculate compensation information	currency, base, hourly	profiles.employments.data[0].amount_type, profiles.employments.data[0].comp_type, profiles.employments.data[0].annual_salary, profiles.employments.data[0].pay_rate
Used to store job history information	type, date, startdate, enddate	profiles.employments.data[0].hire_date, profiles.employments.data[0].termination_date
Used to store time off information	timeoff.approval	timeOff.status
Used to store time off information	timeoff.days, timeoff.hours	timeOff.hours
Used to store time off information	timeoff.enddate	timeOff.end_date

ChartHop field label	ChartHop field code	Zenefits field code
Used to store time off information	timeoff.id	timeOff.id
Used to store time off information	timeoff.note	timeOff.reason
Used to store time off information	timeoff.startdate	timeOff.start_date
Used to store time off information	timeoff.type	timeOff.vacation_type.url, vacations.ids

4.4.2.3.16.2. Installing the Zenefits app

This section covers setting up the Zenefits integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Obtain API Credentials for Zenefits

For ChartHop to access your organization's Zenefits payroll data, you need to create an API token in Zenefits that you can use in ChartHop. This information allows ChartHop to connect to Zenefits to receive your employee data.

1. From Zenefits, go to the Custom Integrations option from the Company Profile.
2. Select Add Token.
3. Select the scopes that include employment and personal data.
4. Click **Save**.
5. Click the eye icon to unmask the token and copy the API key.

Install the Zenefits app

After you have your Zenefits API token, you can install the Zenefits integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.

4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Zenefits app

You'll be prompted to configure your payroll app when you select **Install.**

1. In the **Create your API token** step, copy the API token you created to the provided field.
2. Select **Next step**.

Configure data sync settings for Zenefits

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an open role: • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Historical data	Choose whether or not you want to sync historical data. You can turn this off if you want to exclude any historical changes before the date of your initial sync.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.

3. Select the **Installed Apps** tab.
4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.17. Workday Reports

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

With the Workday Reports integration app, you can sync your payroll data from your Workday reports into ChartHop. Synced data includes contact information, demographics, compensation, managers, departments, locations, and custom fields.

Workday Reports at a glance

The following table summarizes ChartHop's Workday Reports app.

Supported	HCM
Prerequisites	A ChartHop account with the Owner role and a Workday account with administrator privileges.
API key permissions	In Workday, create an Integration System User (ISU) and ensure that the new user has read access to all fields contained within your reports.
Data direction	Inbound from Workday Reports to ChartHop
Sync cadence	Daily or as needed
Effective dating support	No
Additional field mapping support	Yes, any fields that can be added to your report can also be mapped to ChartHop. Please direct all custom mapping requests to ChartHop's Professional Services team.
How to install	See ChartHop's **install guidelines** or view detailed instructions on the ChartHop app install page.
Payroll app overview	Read an **overview** of how how payroll apps work in ChartHop.

4.4.2.3.17.1. Installing the Workday Reports app

This section covers setting up the Workday Reports integration app, which allows you to sync your employee roster to ChartHop.

Review your payroll system data

Your ChartHop payroll app syncs your employee data from your payroll system and builds your org chart in ChartHop. Once your Org Chart is created, you can start using ChartHop.

ChartHop recommends reviewing the data in your payroll system to ensure it is what you expect before you sync it to ChartHop. For example, if an employee has multiple system IDs in your payroll system, that employee's data won't sync properly. You should also be sure that your payroll system reflects an accurate view of your organization, including reporting structures, employee locations, and compensation.

Create your report

Create or identify the report that contains the information you want to sync to ChartHop. For details on the structure of this report, see **Setting up your Workday Report**.

Once the report is ready, obtain its link:

1. Enable the **Webservice URL** for the report
2. Copy the corresponding URL for the **JSON** format

Create an Integration System User

After you obtain your Workday instance URL and name, you need to create an **Integration System User** and enable specific permissions. This will allow ChartHop to read the contents of your report.

To create a Workday **Integration System User**:

1. Login to Workday, and create an **Integration System User (ISU)**.
2. Ensure that the user has **read access** all fields contained in the report. If the report contains calculated / compound fields, make sure the ISU also has access to the upstream fields used in the calculations.

3.

Install the Workday Reports app

After you have your report URL and have created your Integration System User, you can install the Workday Reports app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Availible Apps** tab.
4. Scroll to your payroll app and select **Install** on the far right of the respective app's row.

Connect the Workday Reports app

When you select **Install**, you'll be prompted to walk through configuring the payroll app.

1. Enter your **Workday Reports URL**
2. Enter your **Instance System User** name and password in the provided fields.

Configure data sync settings for Workday Reports

Data sync settings control how and what data is synced to ChartHop from your payroll system. For example, you can choose whether or not to create a backfill position in ChartHop when you have a departure in your payroll system. Other advanced settings allow you to exclude certain employees.

- Select one of the two options:
    - **Automatically create backfills** - This option creates a backfill position in ChartHop (open job) when an employee is marked as departed in your payroll system.
    - **Sync departures only** - This option removes the departed employee from ChartHop. The employee's job history remains in ChartHop.

Configure advanced settings

Advanced settings allow you to better control how your payroll data syncs to ChartHop.

ChartHop recommends accepting the default values for these settings. Please get in touch with ChartHop Support or your Customer Success Manager for assistance if needed.

1. Expand the **Advanced settings** section.
2. Use the following table to guide you through advanced settings decisions.
3. When finished, select **Next step**.

Setting	Description
Missing location information	Select one of the two options for what should happen if location information is set for an employee. • **Set Remote as the default location in ChartHop** - When selected, any open role that does not have a location set will be set to have a Remote location in ChartHop. • **Leave location blank in ChartHop** - When selected, any open role that does not have a location set in your payroll app will not have a location set in ChartHop.
Advanced sync options	Select the data changes you want to include in your sync. You can include some or all of the following employee data: • Job titles • Managers • Groups • Compensation • Hire dates
Overwrite person fields	ChartHop recommends using this setting to avoid needing to update both ChartHop and your payroll system when a change is made to any field value that is synced from your payroll system. When you choose this option, your payroll system remains the source of truth for the following fields in ChartHop: birthdate, gender, home address, and so on. Any edits you or an employee make to this data in ChartHop are overwritten during synchronization. This can pose an issue when someone uses ChartHop to update employee fields in ChartHop, without requesting an update in the source system.
Exclude IDs	To exclude specific individuals from the sync, enter their unique payroll system IDs here, separated by commas.

Run an initial one-time sync of your payroll data

When you first configure your payroll app, you should run a one-time sync to verify that the sync is operating as you expect it to and that your data is what you expect.

To run a one-time sync:

1. In the setup wizard, select the **Run one-time sync** option.
2. Select **Finish setup**.

Verify your data in ChartHop

After running your first sync, you can use the Data Sheet and Org Chart pages to spot-check your data. You can use the Sync History page to verify when the sync was run and if it encountered any issues.

You should spot-check your ChartHop org for the following:

- Correct management reporting lines
- Compensation data
- Employee information on profiles (names, addresses, and so on)
- Job titles
- Departments
- Locations

> Remember that most issues with your synced data originate in your payroll system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. Still, you'll need to fix any data discrepancies in your payroll system and rerun the sync to view the fixes in ChartHop.

Configure your payroll app sync to run daily

After you've synced your data for the first time and verified your Org Chart, you should configure a daily sync. The value of syncing your payroll data to ChartHop is that it ensures that your employee data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps,** if not already pre-selected.
3. Select the **Installed Apps** tab.

4. Scroll to your payroll app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

4.4.2.3.17.2. Setting up your Workday Report

ChartHop's Workday Reports integration works by looking for specific field names within the report. To ensure ChartHop can read all fields in your report, refer to the following **Column Header Overrides** when setting up your report, as ChartHop is configured to look for this specific naming convention when syncing default fields.

For custom fields not covered below, work with your Integration Specialist to decide on a common field name for the corresponding ChartHop field, then ensure that field's **Column Header Override** is set to the same name in the report.

> Column Header names in the report are case sensitive, and cannot contain periods.
>
> For ChartHop fields that include a period, we recommend camalCase-ing (removing spaces and capitalizing the first letter of each word starting from the second word) instead.

Minimum necessary fields

ChartHop Field	Report Column Header Override
contact.workday	WORKDAYid
name.first	firstName
name.last	lastName
title	title
manager	manager
startDate	startDate
endDate	endDate
contact.workEmail	workEmail
department	department

Recommended fields

ChartHop Field	Report Column Header Override
address.city	homeAddressCity
address.country	homeAddressCountry
address.postal	homeAddressPostal
address.state	homeAddressState
address.street1	homeAddressStreet1
address.street2	homeAddressStreet2
address.street3	homeAddressStreet3
baseComp.amount	baseCompAmount
baseComp.currency	baseCompCurrency
baseComp.hoursPerWeek	baseCompHoursPerWeek
baseComp.interval	baseCompFrequency
birthdate	birthdate
compDate	compDate
contact.homeEmail	contactHomeEmail
contact.homePhone	homePhone
contact.mobilePhone	contactMobilePhone
contact.workPhone	contactWorkPhone
ethnicity	ethnicity
gender	gender
hourly	hourly
location	location
name.middle	middleName
name.pref	namePref
name.preflast	namePrefLast
team	team

ChartHop Field	Report Column Header Override
variableTarget.amount	variableAmount
variableTarget.currency	variableCurrency
variableTarget.percent	variablePercent
variableTarget.type	variableType

4.4.2.4. Troubleshooting payroll data

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

This section covers a series of topics regarding how payroll apps sync data.

Employee data

If an employee has multiple profile IDs in your payroll system, the sync may fail due to the conflicting data. To fix this, we recommend validating that all employees have only a single profile instance coming from the payroll system prior to syncing.

Syncing empty fields

If any field in your employee data is empty, the payroll app skips the field during both initial and subsequent syncs.

Syncing location data

When you sync location data between your payroll system and ChartHop, make sure you use the exact same location names in both systems. Also, if your HRIS uses numbers or codes for locations, you can add these to ChartHop using **Aliases** so they match. Learn more.

> Contact ChartHop support to assist you if you notice any duplicate or missing location data after performing a sync.

Job data

When a payroll app runs, it compares the data in ChartHop against the data in the payroll system. When you have jobs or employees in ChartHop that are not included in your payroll system, those jobs and people are skipped during the sync and are not touched or removed from ChartHop.

It is safe to create jobs and people in ChartHop without updating your payroll system, although we recommend keeping both systems up-to-date.

This can happen when the payroll system doesn't cover the whole organization. For example, if you have contractors or international employees that are not in the payroll system. or even when multiple payroll systems are in use.

Reporting to open jobs

If a position is vacated before a replacement can be hired or a new level may be created in an organization as it grows, an employee may report to an *open job* on ChartHop.

There probably won't be a record of this open role on the payroll system's side since there is no payroll data associated with it yet. Within your payroll system, you should set the employee's manager to be the first actual person above the open role.

For example, if Bob reports to an open VP of Marketing job in ChartHop, which, in turn, reports to Alice, Bob's manager should be set to Alice in the payroll system. Meanwhile, the entire manager chain remains accurate in ChartHop and will not be disrupted during a sync.

Title changes and promotions

When you change someone's title in your payroll system, the title change syncs to ChartHop as a neutral change, not a promotion or a demotion. If the title change is a promotion, you should mark it as such on the History page in ChartHop, immediately following the sync.

New hires

When you add an employee to your payroll system, the sync will first try to match the new hire with a person in ChartHop who has the same email, name, or contact ID.

If the sync cannot find such a person, it will look for open roles with the exact title and manager and hire the person into that role, dated to the hire date in the payroll provider. If the sync cannot find any open positions that are a match, it will create a new job and hire the person into that.

If a new job gets created erroneously due to a mismatched title or manager, the best way to fix it is to:

1. Manually undo both the hire and the new job creation in ChartHop.
2. Ensure that an open role exists in ChartHop with the correct title and manager.
3. Re-run the sync.

Correcting data

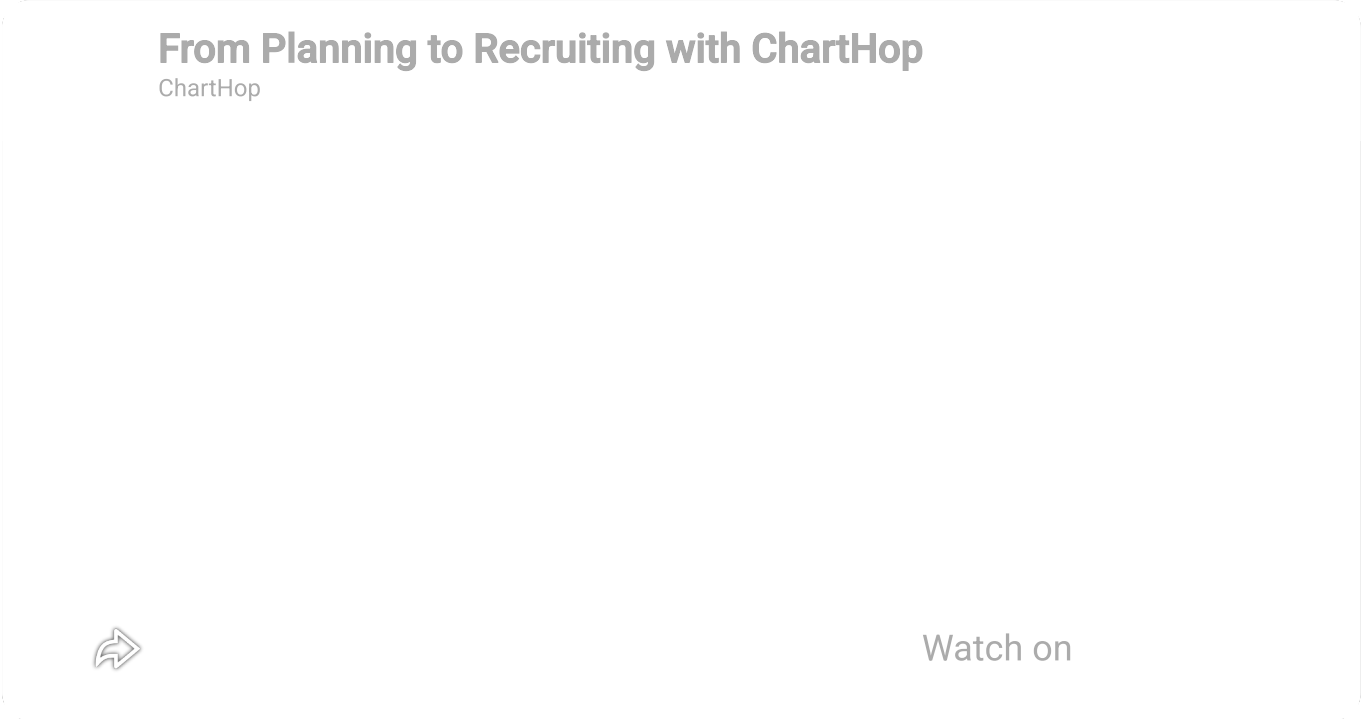
Keeping in mind that ChartHop reflects the current data in your payroll system, if you see data that looks wrong or needs to be updated, you should make that data change in the payroll system.

Making changes in ChartHop without updating the source system will result in that change being overwritten by the next scheduled or manual sync.

Additionally, employee records still remaining in ChartHop despite having been deleted in your payroll after a sync is expected behavior. Since the record was deleted and not terminated in the payroll system, ChartHop cannot update a profile it has no reference to.

4.4.3. Applicant tracking systems

ATS integration apps allow you to configure and manage the flow of hiring data between ChartHop and your preferred application tracking system (ATS).



How data migrates between ChartHop and an ATS

Before configuring an ATS integration app in ChartHop, you need to consider which type of data flow best serves your organization's needs. Depending on your needs, all ATS integration apps offer two types of data flows which offer distinct advantages.

Inbound job data flows

An inbound job data flow brings open jobs from the ATS to ChartHop where the ATS is the source of truth. Inbound data flows support both on-demand syncs and scheduled daily syncs. In most cases, you can rely on daily syncs to pull updated hiring data from your ATS.

Data remains in and is updated within the ATS system. A daily sync pulls information from the ATS to ChartHop. You can also stream data ad-hoc through an on-demand **Sync**

Jobs button that can be accessed within the ATS application configuration page in ChartHop.



When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of inbound job data flows

Inbound job data flows offer a few advantages over outbound job data flows which include:

- Recruiting teams only having to work out of the ATS.
- No changes are required to your standard hiring workflow.
- The process is often easier to start with and implement for first-time users.

Inbound job data flows are recommended if:

- You don't plan on using ChartHop as the source of truth for your hiring plan.
- You work with a team that is very comfortable with their current ATS workflow.
- You have specific data needs with your ATS that ChartHop can't fulfill such as highly unique systems and data types.
- You do not plan to give recruiters access to ChartHop.

Outbound job data flows

With an outbound job data flow, ChartHop is the source of truth and the database of record.

Hiring data is entered and updated in ChartHop, and is then sent from ChartHop to the ATS using event-based trigger flows which update the information in the ATS immediately.



In an Outbound job data flow, open job and req data flow *outbound* from hiring plans in ChartHop to the ATS. This helps recruiting teams using ChartHop for headcount planning to move data seamlessly from the approved headcount plan into their recruiting system. However, once a hire is made in the ATS, that new hire data flows *inbound* from the ATS into ChartHop.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Then, once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of Outbound job data flows

Outbound job data flows offer several advantages over inbound job data flows including:

- The immediate and real-time syncing of information.
- Allowing headcount planning and execution (for example, hiring against the headcount plan) to all take place within ChartHop.
- Allowing hiring managers (or recruiters, or even other stakeholders such as finance) to collaboratively propose and make changes to open jobs automatically without needing to access the ATS.

Outbound job data flows are recommended if:

- You utilize ChartHop for headcount planning and/or being the source of truth for the hiring plan.

- You have simple to standard ATS workflows where ChartHop can fulfill most of the data needs.
- You are looking for real-time visualization across both systems.
- You need more collaboration when managing new jobs.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Technical owner | Owner

4.4.3.1. Greenhouse

The Greenhouse integration app supports a seamless transition from planning to recruiting and hiring by migrating open jobs and new hire data between ChartHop and Greenhouse.

The Greenhouse integration app allows you to leverage the strengths of both the Greenhouse and ChartHop platforms in the following collaborative ways:

- Ensures that talent and leadership teams are aligned on hiring goals by tagging each role with its hiring priority. Once a role becomes active, a change made in ChartHop can automatically feed into Greenhouse, so your requisitions are always up-to-date.
- Automatically updates the org chart in ChartHop with every new hire. As soon as a candidate is hired in Greenhouse, ChartHop's org chart updates to reflect the new hire with no manual steps or delays.

> In complement to the ATS integration, ChartHop provides a bundle of pre-made **Recruiting Reports** available on the **Bundles** page.

Greenhouse ATS integration app summary

The table below contains a list of available features offered by the Greenhouse integration app:

Features	Summary
Data direction	**Inbound or Outbound** The Job Data Flow within the app can be configured in one of two ways: 1. **Outbound, ChartHop to Greenhouse**: ChartHop is the source of truth for open jobs. 2. **Inbound, Greenhouse to ChartHop**: Greenhouse is the source of truth for open jobs. In all cases, candidate information for new hires flows inbound, from Greenhouse to ChartHop.

Sync cadence	**Varied**
	
	Sync cadence of the Job Data Flow differs by configuration:
	
	• **Outbound, ChartHop to Greenhouse**:
	  ◦ Trigger-based (default) syncs when a job creation or update is merged to your primary organization with an **Active** recruiting status.
	  ◦ Daily syncs.
	  ◦ Ad-hoc syncs.
	• **Inbound, Greenhouse to ChartHop**:
	  ◦ Daily syncs.
	  ◦ Ad-hoc syncs.
	
	Sync cadence of candidate information for new hires happens on a trigger-basis when candidates are marked as Hired in Greenhouse.

Synced data	The following data can be synced given the type of integration:
	
	• **Inbound and Outbound data flows**:
	  ◦ Created open roles
	  ◦ Updates to roles
	  ▪ Closed roles.

Features	Summary
	▪ Changes to role details and statuses. ◦ Recruiting metrics ▪ Candidates. ▪ Screens. ▪ Interviews. • **Hired data flow (inbound webhook):** ◦ Hired candidates. If there are multiple ChartHop Jobs mapped to different Openings underneath the same Greenhouse Job, metrics such as number of interviews will be duplicated. • Screens are defined as any stage in Greenhouse that contains the word “screen”. • Interviews are defined as any stage in Greenhouse that contains the word “interview”. • Offers are defined as any stage in Greenhouse that contains the words “offer” or “hire”.
Effective dating support?	No
Custom field mapping support?	Support for custom field mapping to jobs fields is available, in addition to offer-related fields in the new hire webhook. Please direct all custom mapping requests to ChartHop’s Professional Services team.
Installation Prerequisites	Syncing data between Greenhouse and ChartHop requires: • Greenhouse API Credentials (”Harvest API key”). • The Candidate Hired Webhook in Greenhouse.

4.4.3.1.1. Coming soon- Greenhouse-V3

Stay tuned! We're updating our Greenhouse integration, details will be released when we have them.

4.4.3.1.2. Setting up the Greenhouse integration

This section covers the process of setting up the ChartHop Greenhouse integration app which allows you to migrate your job data between Greenhouse and ChartHop.

Setting up the ChartHop Greenhouse integration app requires the following steps:

1. Create a Greenhouse API key
2. Install the Greenhouse integration app
3. Set up the API connection
4. Configure the flow of job data
5. Set up the flow of new hire data
6. Configure outbound group job openings

> ATS integrations are typically done with help from ChartHop's professional services. Contact your implementation specialist before beginning these steps.

Create a Greenhouse API key

In order for ChartHop to access your organization's Greenhouse recruiting data, you need to create an API key to provide to ChartHop.

You use Greenhouse to create this API Key. The user that you use to create the API key must have the *Can manage ALL organization's API Credentials* permission in **Developer permissions**. You can work with your Greenhouse administrator if you have questions.

To create your API key, follow the steps outlined in the **Greenhouse API Documentation**.

Use the Greenhouse instructions to create your API key and enter the following values when creating the key.

Field name	Value
API type	Harvest
Partner	ChartHop
Description	Leave this blank

> Once you create your Harvest API key, a set of permissions are applied to the connection by default. Leave all options as their default settings.

Install the Greenhouse Integration App

Once you've created your API key, you can install the Greenhouse integration app.

To install the Greenhouse integration app:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.
4. Scroll the list down to the Greenhouse app.
5. Select **Install**.

Select **Install** from the app install page.

Set up the API connection

To allow ChartHop to access your Greenhouse data, enter your Greenhouse API credentials in the proper fields in the **Connection** section of the **Settings Tab** of the app.

Using the following fields, add both your **Greenhouse Domain** and **Harvest API Key**:

Field	Description
Greenhouse subdomain	The subdomain used by your Greenhouse instance. For example, if your domain is called: myorg.greenhouse.io, then your subdomain would be “myorg”.
Harvest API Key	The Harvest API key generated in Greenhouse.

Configure the flow of job data

Once you establish your API connection, you can configure the type of job data flow that the integration runs.

Select your sync direction & source of truth

When setting up your integration, you can choose the primary source of truth when referencing new job data. An outbound job data flow sets ChartHop as the source of truth, whereas, an inbound job data flow sets Greenhouse as the source of truth.

To select your Greenhouse integration's sync direction:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Greenhouse** app.
5. Select the **Greenhouse** app.
6. From the ChartHop **Greenhouse** app settings page, scroll down to the **Basic Settings** section.
7. Select one of the two options:
    1. **Outbound** - ChartHop as source of truth. Active open jobs in ChartHop will be pushed to Greenhouse.
    2. **Inbound** - Greenhouse as source of truth. Active jobs in Greenhouse will be imported from to ChartHop.

Configure the Greenhouse integration

Depending on the type of job data flow you choose, you may enable specific configurations to match your desired setup.

Basic Settings

Setting	What it does	Notes
Run Daily	When turned on, it will syncs data every morning. When enabled, regardless of data direction, job-related candidate metrics are pulled on a daily basis every morning. For customers on the inbound job data flow direction, this also causes the inbound job data flow to run on a daily basis every morning. When turned off, syncs will only run manually or based on events depending on other settings.	Recommended for most setups.
Sync on change	Syncs immediately when a change to a linked open job is made or a new job becomes active.	Only availible for Outbound syncs
Reconciliation	Reconciliation When enabled, reconciles Greenhouse role and field data with ChartHop, treating ChartHop as the source of truth. For example, if an open job exists in ChartHop but not in Greenhouse, a matching req is created in Greenhouse. Reconciliations can either happen on an ad-hoc basis or on a daily basis if the **Run daily** option is enabled.	Only availible for Outbound syncs
Default location if not provided	When set to Remote, newly synced records that are not assigned a location are assigned the value "Remote" for their Location.	

Job Matching

Job matching settings allow you to configure how ChartHop Jobs are automatically matched to Greenhouse Jobs and vice versa.

Field	What it does
Match by job codes first	When enabled, it matches ChartHop Jobs with existing Greenhouse Jobs via the Requisition ID in Greenhouse (if the Requisition ID matches the ChartHop Job Code). If no match is found via Requisition ID (Greenhouse) and Job Code (ChartHop), then the integration continues to attempt to match based on the chosen “Group Job Openings” option.
Group Job Openings	The fallback method for matching on a job is: • Title • Title and Location • None — Only matched on Job Codes
Title matching advanced settings	Two options that are used for specific title matching formatting options
If it matches to a closed job, what should happen?	The logic for matching for closed jobs: • Re-open job and create new opening • Create new job and opening

Set up the flow of new hire data

You can use the new hire webhook job data flow to bring new hires from Greenhouse to ChartHop when the candidate is marked as “Hired” in Greenhouse, along with their relevant personal information, such as address, phone number, and email.

New hire webhooks are not processed if the person being hired already exists in ChartHop, even if they aren’t actively in a role. This means that we cannot support (via new hire webhooks):

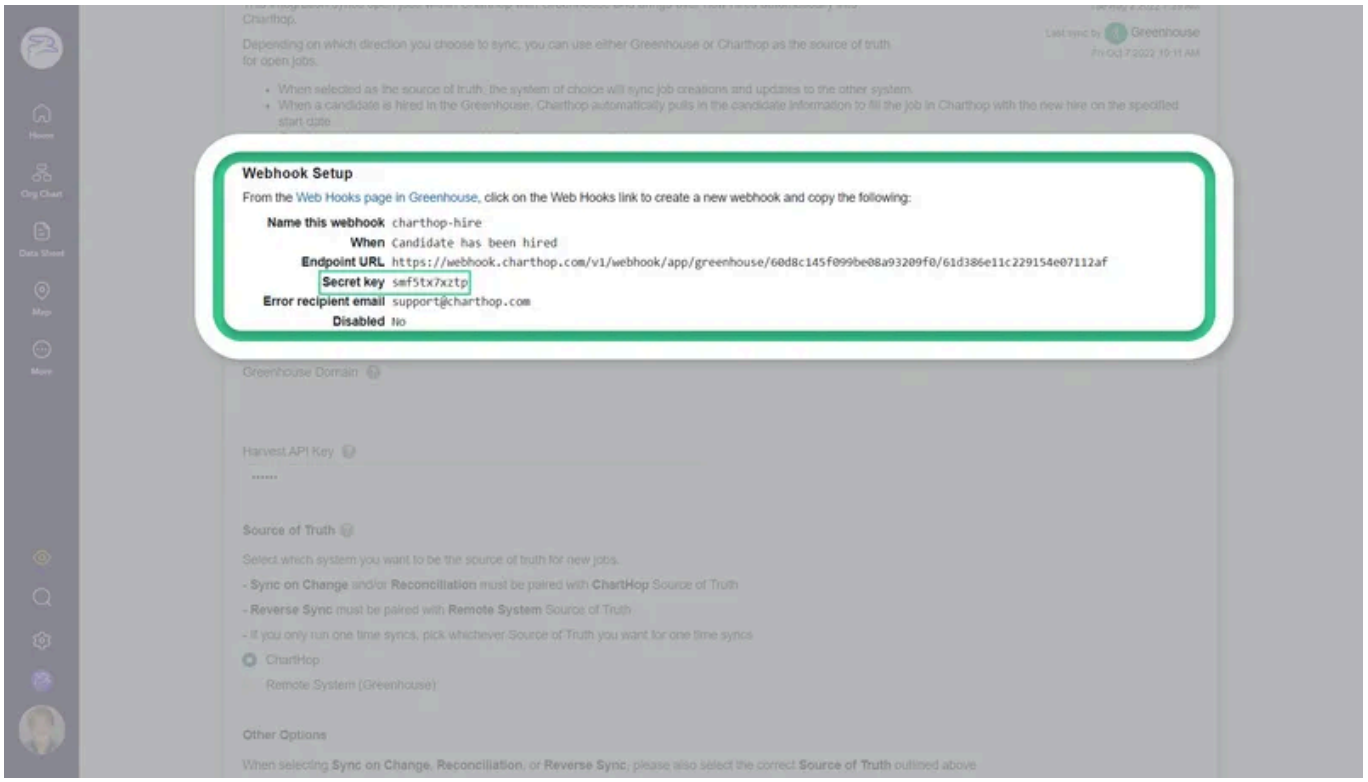
- Internal transfers
- Re-hires

Only the first new hire webhook for a job in ChartHop is supported.

- For example, if you update an offer packet and rehire the candidate in Greenhouse, the updated information are not processed in ChartHop unless the new hire in ChartHop is removed first.

A new hire webhook is not processed if the job does not exist in ChartHop.

> All new hire webhook job data flows are inbound (Greenhouse to ChartHop).



Copy your generated Secret key to enable your web hook in Greenhouse.

To configure the new hire webhook job data flow, follow the steps below.

In ChartHop:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Greenhouse** app.
5. Select the **Greenhouse** app.
6. From the ChartHop **Greenhouse** app settings page, copy the secret key value under **New Hire Webhook**.

In Greenhouse:

1. Follow the instructions in Greenhouse to **enable your webhook**.
2. Enter the required information using the table below:

Field	Value
Name this webhook	charthop-hire
When	Candidate has been hired
Endpoint URL	`https://webhook.charthop.com/v1/webhook/app/greenhouse/5a12dddd6f2b8f0e63fc8e64/5b15fbf1bd35a93451fc5df3`
Secret Key	[Obtained above]
Error recipient email	**support@charthop.com**
Disabled	No

Save the web hook when you are done.

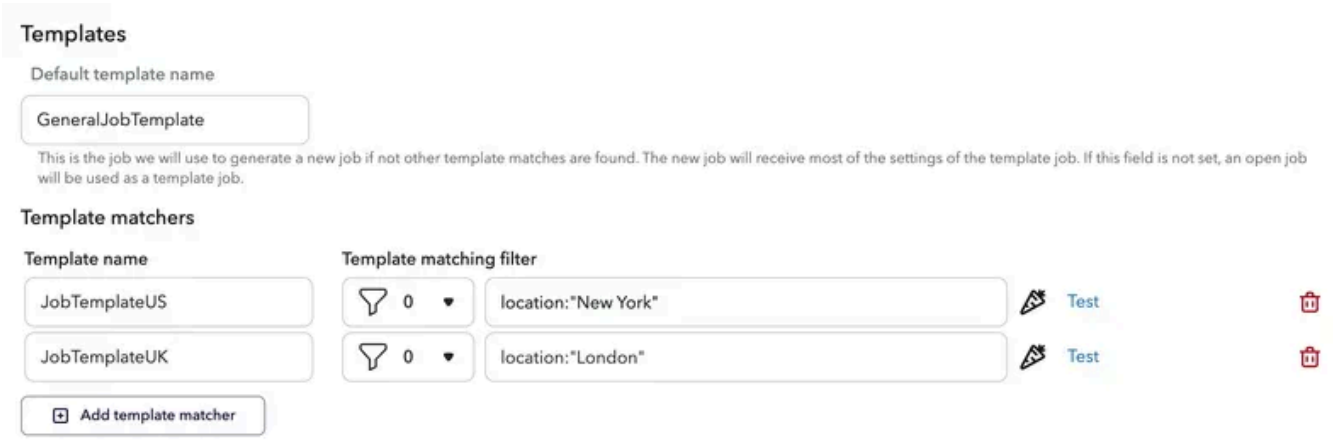
4.4.3.1.2.1. Greenhouse Job Templates

Custom and default job template matchers

With job templates you can create detailed job postings that can be assigned to jobs in your Greenhouse integration.

Create a default job template matcher

You can specify a default template for your jobs in your Greenhouse integration app's settings. The default template is used whenever a job in ChartHop does not match any of the criteria specified in the **Template Matching Filter**. Similarly, if no custom job templates are provided, all new Greenhouse Jobs are created using the default template. You can create a default template in order to account for jobs that do not have any specific criteria.



To create a default job template in ChartHop:

1. Mark the existing job in Greenhouse as a *template job*.
2. Create your default template job in Greenhouse.
3. In ChartHop, from the left sidebar, select **Apps & Bundles**.
4. From the sub-menu, select **Apps**.
5. Select the **Installed Apps** tab.
6. Scroll the list down to the **Greenhouse** app.
7. Select the **Greenhouse** app.
8. From the ChartHop **Greenhouse** app settings page, enter the name of your default template under the **Default Template Name**.

Create a custom job template matcher

With a custom job template, you can specify what job template to use when creating a new Greenhouse Job if no match is found. This allows you to include additional information, such as the job's description.

To create a custom job template in ChartHop:

1. Mark the existing job in Greenhouse as a *template job*.
2. Create your template job in Greenhouse.
3. In ChartHop, from the left sidebar, select **Apps & Bundles**.
4. From the sub-menu, select **Apps**.
5. Select the **Installed Apps** tab.
6. Scroll the list down to the **Greenhouse** app.
7. Select the **Greenhouse** app.
8. From the ChartHop **Greenhouse** app settings page, in the **Template Matchers** section, select **+ Add Template Matcher** to create a new template matcher.
9. Enter the template name using the same name of the template you made in Greenhouse.

> Because your ChartHop template name must exactly match the job template name in Greenhouse, we recommend that you copy and paste the name to avoid any errors.

Customize your filters

Under Template matching filter you can build custom logic to determine when the template is used. For example, in the picture, we are specifying that any job that is part of the "New York" Office to use the"JobTemplateUS" in Greenhouse.

When a new job is created in Greenhouse and no existing matches are found, the Greenhouse job contains additional information attached to that job template, such as the job post, job description, and interview plan.

Test your job template matcher

You can test your templates to ensure that your open jobs are properly selected. This allows you to perform a manual check of your filter criteria to see what existing ChartHop

Jobs match that criteria by highlighting them in the **Data Sheet**.

To test your job template filter:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Greenhouse** app.
5. Select the **Greenhouse** app.
6. From the ChartHop **Greenhouse** app settings page, in the **Template Matchers** section, select **+ Add Template Matcher** to create a new template matcher.
7. Paste your Greenhouse template name in the **Template Name** field.
8. Enter your **Template Matching Filter**.
9. Select **Test**.

If your test is successful, you can see a filtered **Data Sheet** containing all jobs in ChartHop that match your criteria.

4.4.3.1.2.2. Greenhouse Field Mappers

Built in field mappers

Mapped job data between ChartHop and Greenhouse

The following fields are used during an inbound or outbound job data flow:

ChartHop field	Greenhouse field
req	opening.opening_id
recruit	opening.status
createdate	opening.opened_at
title	job.name
employment	job.custom_fields.employment_type
department	job.departments
location	job.offices
hiremgr	job.hiring_team.hiring_managers[0].id, job.hiring_team.hiring_managers[0].name
recruiter	job.hiring_team.recruiters[0].id, job.hiring_team.recruiters[0].name

Mapped new hire data from New Hire Webhook

The following fields are used during a new hire webhook data flow:

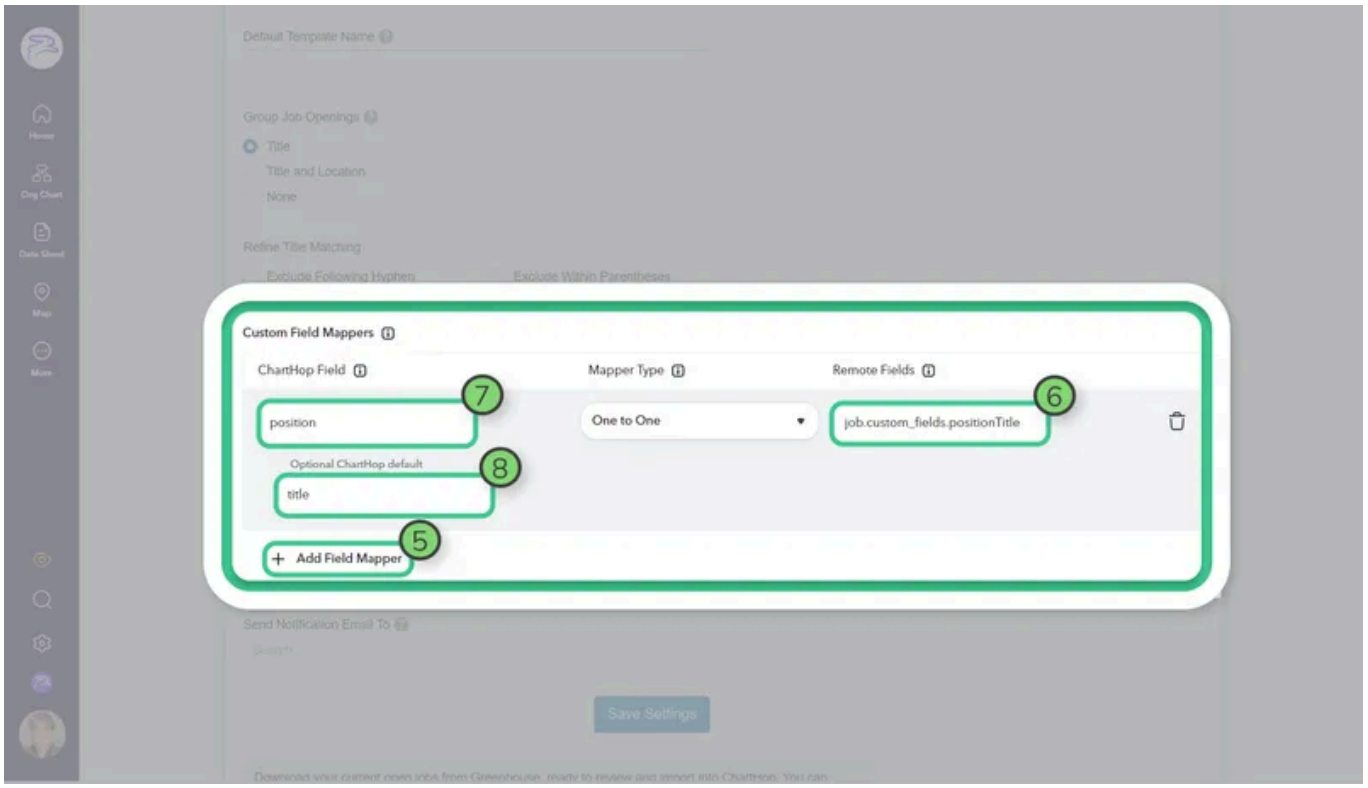
ChartHop field	Greenhouse field
name.first	candidate.first_name
name.last	candidate.last_name
contact.homeemail	candidate.email_addresses[?(@.type == 'personal' || @.type == 'other')].value.first()
contact.workemail	candidate.email_addresses[?(@.type == 'work')].value.first()
contact.mobilephone	candidate.phone_numbers[0].value
startdate	offer.starts_at
currency	offer.custom_fields.salary.unit
base	offer.custom_fields.salary.value, offer.custom_fields.salary
variable	offer.custom_fields.bonus.value, offer.custom_fields.bonus, offer.custom_fields.variable_compensation.value, offer.custom_fields.variable_compensation, offer.custom_fields.variable.value, offer.custom_fields.variable
grantshares	offer.custom_fields.stock_option.value, offer.custom_fields.stock_option, offer.custom_fields.equity.value, offer.custom_fields.equity
userid	user.id
name	user.name
email	user.primary_email_address

You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

Custom field mappers

Custom field mappers can be used to map additional custom fields between Greenhouse and ChartHop.

You can use custom field mappers to override the default field mappings. For example, you can pull a custom field into a ChartHop default field. Similarly, you can disable default field mappers. For more information about managing custom fields, please contact your ChartHop implementation specialist.

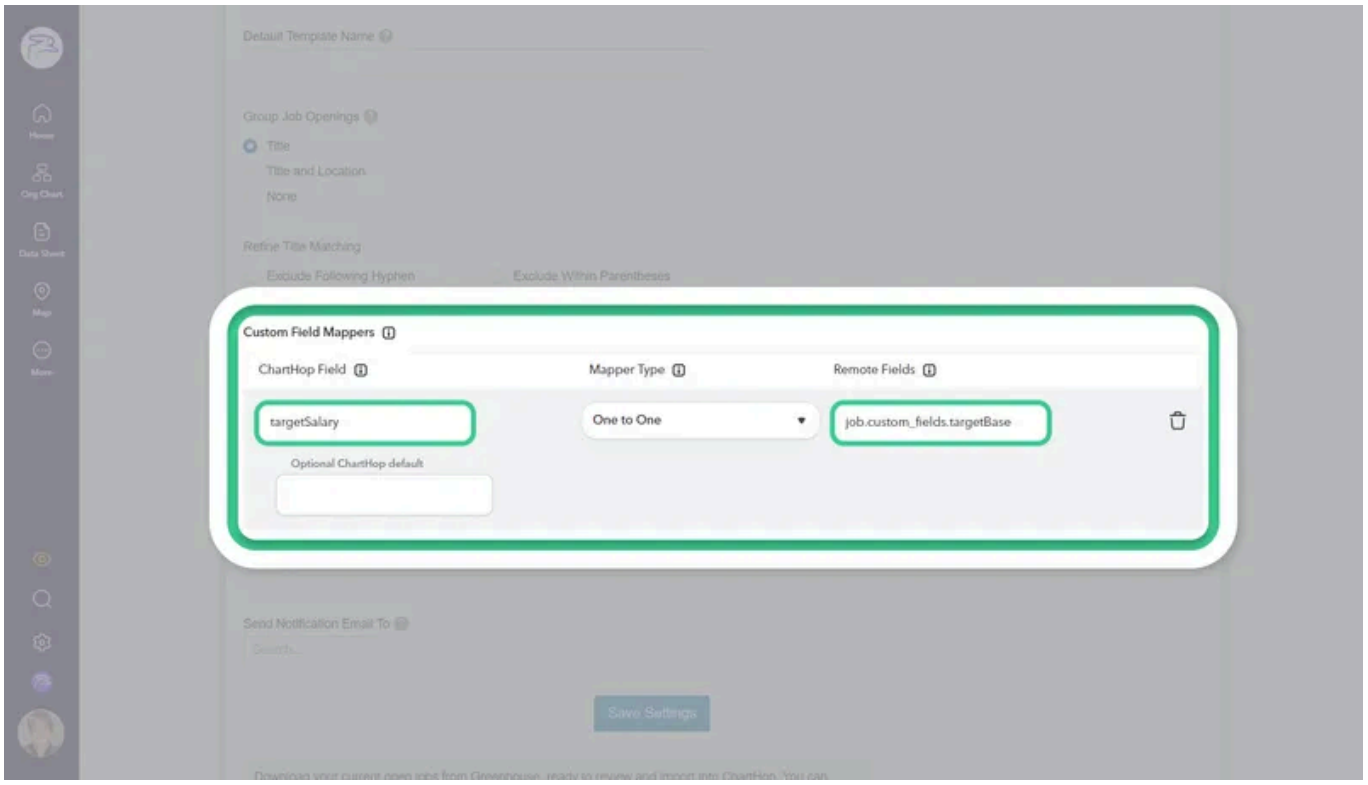


You can use custom field mappers to override the default field mappings.

To create a custom field mapper, follow these steps:

1. In ChartHop, from the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Greenhouse** app.
5. Select the **Greenhouse** app.
6. From the ChartHop **Greenhouse** app settings page, scroll down and select the **Inbound Field Mapper** page.
7. Enter your Greenhouse custom field code name under **Remote Fields**, appended with the correct endpoint.
    - To ensure that your Greenhouse field parses correctly, your **Remote Fields** must be preceded by the correct endpoint (job., offer., etc.), and structured as follows:
        - The endpoint (such as job) + custom_fields. + your Greenhouse Immutable Field.
8. In the **ChartHop Field**, enter the field or Carrot expression you wish to map to the previously entered Greenhouse custom field.
9. (Optional) You can overwrite an existing default ChartHop field with your custom field. We recommend that you contact your ChartHop Implementation Specialist before trying this.

As an example, if you wanted to map a ChartHop custom field like *targetSalary* to the Greenhouse custom field *targetBase*, then you'd want to set up your field mapper like in the image below:



The custom ChartHop Field: targetSalary is mapped to the custom Greenhouse Remote Field: targetBase.

> To avoid failed mappings, be sure to double-check the names of the custom fields you are using.

Set new hire announce dates

When candidates are hired and they are created in ChartHop, you have a choice about when you want them to show up publically to your organization

Under the option **New Hire Webhook Announce Date** select one of the following:

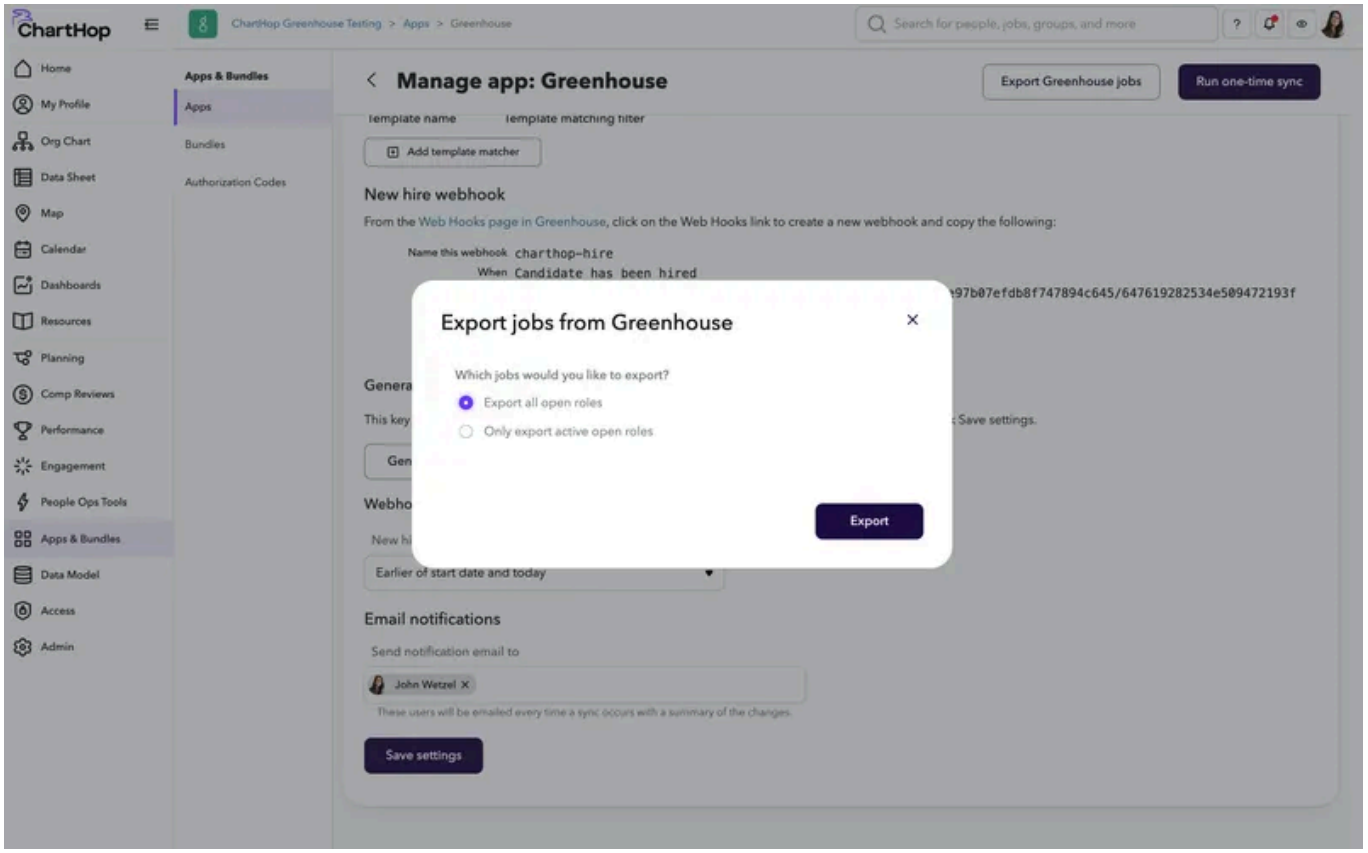
- **Start date** - The new hire will not be org public until their start date.
- **Today** - The new hire will be displayed immediately on the day of the sync
- **Earlier of start date and today (Default)**

4.4.3.1.2.3. Adding Greenhouse Jobs

When you configure ChartHop to be the source of truth (outbound data flow), you can choose to import any previously existing Greenhouse jobs into ChartHop.

This is a two-step process. First, you'll use ChartHop's Greenhouse integration app to export your existing jobs and then use ChartHop to import your exported jobs to ChartHop using a CSV file.

You can choose add all jobs, including those that are not active, or just import your active jobs from Greenhouse.



Use the app to export existing Greenhouse jobs to a CSV

To export Greenhouse jobs follow these steps:

1. In ChartHop, from the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Greenhouse** app.

5. Select the **Greenhouse** app.
6. From the ChartHop **Greenhouse** app, in the header select the **Export Greenhouse jobs**. settings page, select one of the following:
    - **Only export active open roles** if you wish to include only **Open** Greenhouse jobs.
    - **Export all open roles** if you wish to include all job openings.
7. Select **Export**

Verify your exported roles

Before you import Greenhouse jobs into ChartHop, follow these steps:

1. Open the .csv in Excel or Google Sheets.
2. Remove any roles that are not on your hiring plan, such as test jobs or otherwise closed roles.
3. Ensure that the list of roles is correct and up to date, and reflects what you want imported into ChartHop as the new source of truth for your hiring plan.

Import your Greenhouse jobs to ChartHop

To import your saved CSV to ChartHop, save the edited file as a .csv or .xlsx and upload it on the **Import Spreadsheet** page in ChartHop.

Once the upload is complete, the hiring plan of open jobs in ChartHop should mirror the hiring plan of open reqs in Greenhouse. From this point forward, you can use ChartHop as the system of record for open roles.

4.4.3.1.3. ChartHop as the source of truth

With an outbound job data flow, ChartHop is the source of truth and the database of record.

Hiring data is entered and updated in ChartHop, and is then sent from ChartHop to the ATS using event-based trigger flows which update the information in the ATS immediately.



Open reqs data flows Outbound, while new hires data flows inbound.

In an Outbound job data flow, open job and req data flow *outbound* from hiring plans in ChartHop to the ATS. This helps recruiting teams using ChartHop for headcount planning to move data seamlessly from the approved headcount plan into their recruiting system. However, once a hire is made in the ATS, that new hire data flows *inbound* from the ATS into ChartHop.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Then, once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of Outbound job data flows

Outbound job data flows offer several advantages over inbound job data flows including:

- The immediate and real-time syncing of information.
- Allowing headcount planning and execution (for example, hiring against the headcount plan) to all take place within ChartHop.

- Allowing hiring managers (or recruiters, or even other stakeholders such as finance) to collaboratively propose and make changes to open jobs automatically without needing to access the ATS.

Outbound job data flows are recommended if:

- You utilize ChartHop for headcount planning and/or being the source of truth for the hiring plan.
- You have simple to standard ATS workflows where ChartHop can fulfill most of the data needs.
- You are looking for real-time visualization across both systems.
- You need more collaboration when managing new jobs.

4.4.3.1.3.1. Using ChartHop to open jobs

In an outbound job data flow, ChartHop serves as the primary source of truth for open jobs. Depending on the status of a job in ChartHop, it translates to a specific status for the same job in Greenhouse.

Only one Hiring Manager and Recruiter can be chosen in ChartHop and thus be synced into Greenhouse.

As a workaround, if Hiring Manager and/or Recruiter is blank in ChartHop, but multiple exist in Greenhouse, syncs do not overwrite what's in Greenhouse.

> Group fields cannot be custom mapped. For example a Department in ChartHop can not be mapped to a custom Greenhouse field, and a custom field in ChartHop can not be mapped to Greenhouse Department.

> Greenhouse job field values default to ChartHop's if any changes are made, therefore changing an open role must be done in ChartHop to be accurately reflected in Greenhouse.
>
> However there is an exception for Hiring Manager and Recruiter fields where the integration will not override those fields if they are left empty in ChartHop. This is to accommodate Greenhouse's ability to have multiple hiring managers and recruiters.

Outbound job status mappings

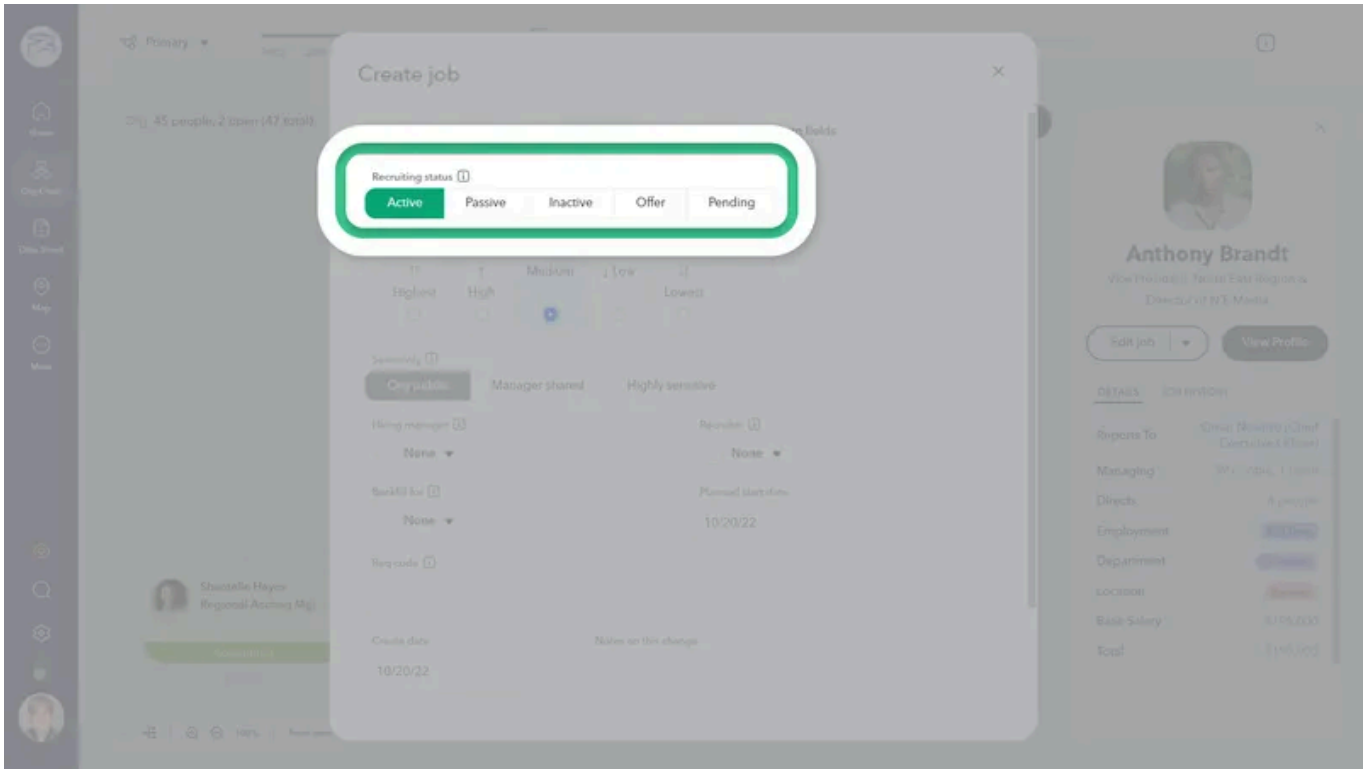
ChartHop job statuses map to Greenhouse job statuses in the following way:

ChartHop Status	Data flow	Greenhouse Opening Status
Active	→	Open
Passive	→	Closed
Inactive	→	Closed
Pending	←	Offer Accepted
Offer	→	Does nothing
Remove Job	→	Opening Deleted

> Charthop Jobs only change the status of Greenhouse Openings directly. That being said, if all Openings underneath a Greenhouse Job are deleted or closed, the Greenhouse Job will automatically turn to Closed.

Create a job

When conducting your headcount planning in ChartHop, you can add new hires and new direct reports as you normally would, but with the added functionality of the outbound data flow which triggers the moment you set a specific new role(s) **Recruiting status** to **Active**.



Setting a job as Active triggers the oubound data flow.

To create a new job in ChartHop under an outbound job data flow, follow these steps:

1. From the left sidebar, select **Org Chart.**
2. In the **Org Chart**, create a new job by either:
    - Adding a direct report by selecting **Add a direct report** under a pre-existing person or role.
    - Creating a new job by selecting **New hire** under a pre-existing person or role.
3. In the **Create job** dialog enter your information for the new role under the following tabs:
    - **Structure** - General information about the role, including title, department, and location.
    - **Compensation** - Compensation information about the role, including salary and bonuses.
    - **Recruiting** - Recruiting information about the role, including hiring status and start date.
    - **Description** - A general description about the role.

The outbound job data flow kicks in the moment you set the **Recruiting status** for your newly created role is set to **Active**.

Job hiring status

Any open roles with a **Recruiting status** set to **Active** in ChartHop flow from ChartHop to Greenhouse. New open jobs in ChartHop with an **Active** recruiting status close in Greenhouse if the job is set back to an **Inactive** or **Passive** status in ChartHop. Deleting a job in ChartHop removes the same job in Greenhouse.

ChartHop job status	Result in Greenhouse
Active	A req is automatically created in Greenhouse either as a new Greenhouse job or opening, or as a new opening underneath an existing Greenhouse job.
Inactive or Passive	The job opening is closed in Greenhouse. A created ChartHop Job set as Inactive or Passive does not sync over to Greenhouse during the initial Greenhouse Job/Opening creation unless it is set to **Active.**
Removed job	The job opening is deleted in Greenhouse.

> If the job in ChartHop is the only opening beneath a Greenhouse job, and if the opening is set to **Closed** in Greenhouse, if the ChartHop job is set to **Inactive** or **Passive**, then the job in Greenhouse is automatically closed.

Job templates

When a new job is created in ChartHop, it copies the job posting from the matching job template configured in the Greenhouse integration job template settings. See**Greenhouse Job Templates** for more infor

Job matching

With **Match Jobs by Job Code** enabled in the Greenhouse integration settings, all ChartHop jobs match with their respective Greenhouse jobs according to the Greenhouse job's *Requisition ID*.

New jobs created in ChartHop with a Job Code are reflected in Greenhouse with the Job Code's name (Settings > Groups > Job Codes) instead of the job's title.

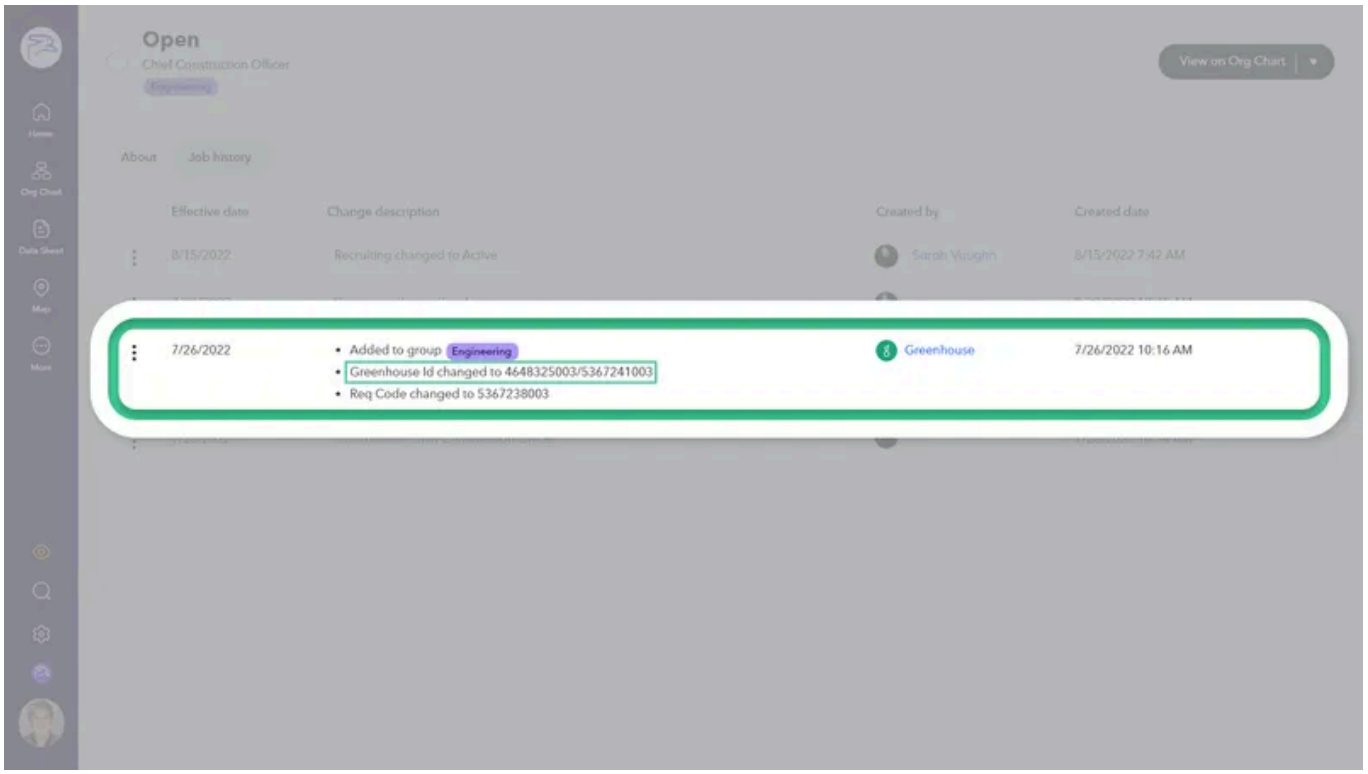
If **Match Jobs By Job Code** is disabled, no job codes exist, or if no match is found via job codes, the initial mappings are then determined by your **Group Job Openings** settings (for example **Title**, **Title and Location**, or **None**).

For example, if **Title** is selected, then a ChartHop Job is created as a Greenhouse opening underneath a Greenhouse job that has the same **Title**. Once the initial mappings are set,

the job in ChartHop is tied to the job in Greenhouse through the Greenhouse Job ID (*greenhouseId)* field in ChartHop.

ChartHop stores both the job id and opening id in the Greenhouse Job ID (*greenhouseId*) field, separated by a slash.

For example, if *greenhouseId* has a value of 123/456, that means the job id has a value of 123 and the opening id has a value of 456.



Creating a job generates the greenhouseId denoted as jobid/openingid.

> The Opening ID is NOT the Opening ID field in the Greenhouse UI. It is the API-assigned Opening ID. If no “Req Code” is provided in ChartHop, ChartHop automatically sets the Opening ID in the Greenhouse UI to the API-assigned Opening ID. However, changing the Opening ID in the Greenhouse UI will not change the API-assigned Opening ID, so manually changing the greenhouseId in ChartHop is *not recommended*.

Job matching when merging roles to primary in a scenario

When managing an outbound data flow in a ChartHop scenario, you should be aware of the logic used in order to match the jobs.

Once you create a new job in ChartHop or update the job to **Active** through the Org chart, or using a merged scenario, the new job information migrates to Greenhouse.

If a job match can't be found in Greenhouse, a new Greenhouse job is created via the job's template. The job post tied to the newly created Greenhouse job is the job post specified according to the job's assigned job template in the Greenhouse integration app's settings.

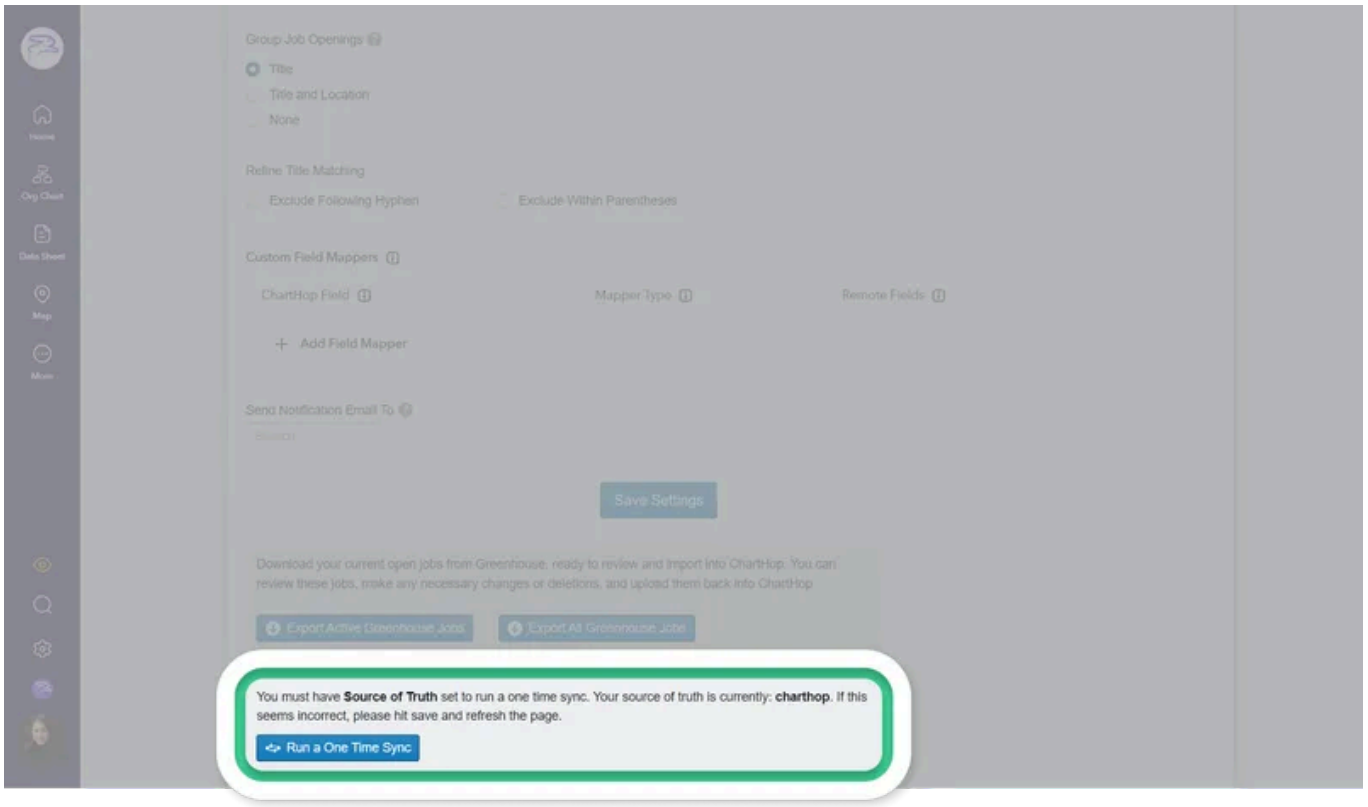
As a recruiter, after an initial sync, you can navigate to Greenhouse and update all of the pertinent information pertaining to a role that is not updated in ChartHop, such as the job's description. With this done, you can begin actively recruiting for the open role.

Reconcile data

During a sync, you may run into inconsistencies with your data due to sync failures or changes in the custom field mappings. To handle these cases, you can enable the Greenhouse integration app's **Reconciliation** feature.

With **Run Daily** enabled in the Greenhouse integration app configuration settings, reconciliations are triggered on a daily basis. You may also manually trigger the reconciliation by selecting the **Sync Greenhouse Jobs** button located at the base of the Greenhouse integration app settings page.

> Reconciliations are only available for outbound job data flows.



Select the Run a One Time Sync button to manually trigger a reconcilliation.

To manually run a data sync reconciliation:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Greenhouse** app.
5. Select the **Greenhouse** app.
6. From the ChartHop **Greenhouse** app settings page, scroll down to the bottom of the settings page.
7. Select **Sync Greenhouse Jobs**.

4.4.3.1.4. Greenhouse as the source of truth

An inbound job data flow brings open jobs from the ATS to ChartHop where the ATS is the source of truth. Inbound data flows support both on-demand syncs and scheduled daily syncs. In most cases, you can rely on daily syncs to pull updated hiring data from your ATS.

Data remains in and is updated within the ATS system. A daily sync pulls information from the ATS to ChartHop. You can also stream data ad-hoc through an on-demand **Sync Jobs** button that can be accessed within the ATS application configuration page in ChartHop.



Open reqs and new hire data flow Inbound.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of inbound job data flows

Inbound job data flows offer a few advantages over outbound job data flows which include:

- Recruiting teams only having to work out of the ATS.
- No changes are required to your standard hiring workflow.
- The process is often easier to start with and implement for first-time users.

Inbound job data flows are recommended if:

- You don't plan on using ChartHop as the source of truth for your hiring plan.

- You work with a team that is very comfortable with their current ATS workflow.
- You have specific data needs with your ATS that ChartHop can’t fulfill such as highly unique systems and data types.
- You do not plan to give recruiters access to ChartHop.

4.4.3.1.4.1. Using Greenhouse to open jobs

In an inbound job data flow, Greenhouse open job data flows to ChartHop.

Job status migration

Greenhouse jobs/openings migrate to ChartHop if the Opening status is set to **Open**. As a result, any changes to open roles in ChartHop are not reflected in Greenhouse.

For example, if a mapped Greenhouse role is changed to *Closed* and the department is updated, the job in ChartHop updates to an **Inactive** status and the department in ChartHop is updated.

> If multiple Hiring Managers or Recruiters are specified in Greenhouse, ChartHop takes the **first** one specified.

The following table describes how the Greenhouse integration handles its response to changes in a Greenhouse job and opening status. This assumes that the Greenhouse job is not yet mapped to an existing ChartHop job:

Greenhouse Job Status	Greenhouse Opening Status	ChartHop Result
Open	Open	Created as Active
Open	Closed	Nothing gets created
Draft	Open	Created as Active
Draft	Closed	Nothing gets created
Close	Closed (open is not possible)	Nothing gets created

> It's important to note that inbound job data flows only pull in **Openings with a status of Open** from your ATS into ChartHop.

Open roles must have a Hiring Manager set in Greenhouse, which will be referenced in Charthop as both the manager and hiring manager. Open roles without a manager set in Greenhouse do not migrate over. Additionally, while a recruiter is not required in

Greenhouse, if a recruiter is set in Greenhouse and the recruiter does not exist in ChartHop, the jobs also do not sync over.

Job status mappings

Greenhouse communicates its hiring status to ChartHop using the following mappings:

Greenhouse Opening Status	Data flow	ChartHop Status
Open	→	Active
Closed	→	Inactive

4.4.3.1.5. Hiring candidates

Once you hire a candidate in Greenhouse, a new hire is automatically created in ChartHop to fill the mapped job in Greenhouse.

The new hire data flow triggers whenever an individual is marked as **Hired** in Greenhouse. The action fires a webhook to ChartHop, which provides ChartHop with the necessary information to pull in the pending hire. **Learn more**.

> The webhook must be set up in Greenhouse first. If you need help setting up the webhook for, please contact your ChartHop implementation specialist.

To hire an individual in Greenhouse:

1. Navigate to **Candidates.**
2. Select **Offer Details**.
3. Select **Job**.
4. Set Mark Candidate as **Hired**.

The Greenhouse Job ID (*greenhouseId*) is used to map the Greenhouse Opening with the corresponding job in ChartHop.

If you notice that a job in ChartHop has not switched to **Pending** after the mapped Greenhouse Opening is hired into, you can manually add the new hire into ChartHop.

> Once the new hire is added to the HRIS system, the new hire information coming from the payroll system matches with and updates the pending new hire that is created in ChartHop from the new hire data flow.

Set new hire announce dates

When candidates are hired and they are created in ChartHop, you have a choice about when you want them to show up publically to your organization

Under the option **New Hire Webhook Announce Date** select one of the following:

- **Start date** - The new hire will not be org public until their start date.

- **Today** - The new hire will be displayed immediately on the day of the sync
- **Earlier of start date and today (Default)**

4.4.3.1.6. Troubleshooting and FAQ

This section covers a series of potential issues you may run into when setting up or configuring the Greenhouse integration app, as well as provides answers to commonly asked questions.

Harvest API key

Why is my Harvest API key not working?

If you're having trouble with your Harvest API key, it's may most likely be due to your setup permissions. Please refer to the table below for a complete list of the necessary permissions.

Type	Permissions
Applications	• GET: Retrieve Application • GET: List Applications
Candidates	• GET: Retrieve Candidate • GET: List Candidates
Users	• GET: Retrieve User • GET: List Users • GET: List User Future Job Permissions • GET: List User Job Permissions • GET: List Pending Approvals • PUT: Add a job permission
Offers	• GET: List Application's Offers • GET: Retrieve Application's Current Offer • GET: Retrieve Offer • GET: List Offers
Departments	• GET: Retrieve Department • GET: List Departments • POST: Create a new department • PATCH: Update a department
Jobs	• GET: Retrieve Job • GET: List Jobs • PATCH: Update Job • POST: Create a new job • PUT: Replace hiring team
Job posts	• GET: List Job Posts • GET: Retrieve Job Post for Job • GET: List Job Posts for Job • PATCH: Update job posts

Type	Permissions
Job stages	• GET: Retrieve Job Stage • GET: List Job Stages • GET: List Job Stages for Job
Job openings	• GET: List Openings For a Job • POST: Create openings • DELETE: Delete openings • PATCH: Edit openings
Offices	• GET: Retrieve Office • GET: List Offices • POST: Create a new office • PATCH: Update an office
User roles	• GET: List user roles

If you are still unable to complete this step after attempting the troubleshooting options above, reach out to **support@charthop.com**.

Permissions

Which roles are able to use the Greenhouse integration?

There are two OOTB access levels in ChartHop specifically designed for Recruiters**:**

1. **Recruiting Editor:** These users are allowed to view and make changes to open jobs, including target compensation levels and sensitive jobs. They are not allowed to make changes to, or access sensitive data about current employees, other than those they manage. **This permission is generally intended for Recruiting roles or those managing the ATS.**
2. **Recruiting View:** These users are allowed to view sensitive information about open jobs only, including target compensation levels and viewing all sensitive jobs. They are not allowed to make changes to the primary timeline, or access sensitive information about current employees other than those they manage.

Other access levels with the ability to open roles:

- **Primary Editor:** These users are allowed to view all information, and make official, permanent changes to the primary timeline. This access should be restricted tightly and limited to a few authorized individuals in HR, Finance, or similar roles.
- **Owner:** These users are allowed full access to everything, including the ability to change user permissions, configure integrations, and alter organization-wide settings. Because of the scope involved, this access should be tightly restricted

Metrics

Where do metrics come from?

ChartHop, once daily, pulls a list of candidates in the ATS, and updates metrics based on the stages that the candidates are in.

For more information about metrics data, reach out to ChartHop's Professional Services team.

Data sync updates

When do updates for ChartHop to Greenhouse job data flows push over?

Updates for ChartHop to Greenhouse job data flows push over under the following cases:

- If a job in ChartHop has not already been mapped to a Greenhouse Job/Opening, the initial sync occurs when the job is set to **Active** recruiting status in Primary.
- If a job in ChartHop has already been mapped to a Greenhouse Job/Opening, updates sync over to Greenhouse regardless of recruiting status.

When do ChartHop jobs get created for Greenhouse to ChartHop job data syncs?

ChartHop jobs are created for Greenhouse to ChartHop job data syncs during the following:

- If a Greenhouse Job/Opening has not been mapped to a job in ChartHop, a new job is created in ChartHop if the Greenhouse Opening is Open and Greenhouse Job status is either Open or Draft.
- If a Greenhouse Job/Opening has already been mapped to a job in ChartHop, then updates sync over to ChartHop regardless of status until the job is filled. After that, no

updates are synced.

How do I safely clean up roles that were accidentally duplicated during the sync?

Contact support@charthop.com to fix this.

Job data

Why did the job data flow fail?

In case a job fails to be properly created, you can check for the following:

1. Confirm that your API and Webhook credentials are correct.
2. Confirm that your **Hiring Manager** and **Recruiter** have accounts in both ChartHop and Greenhouse with the **same** email address.
3. **Private** and **Standard** Job Admin levels are supported by default. Custom levels are also supported, however, not by default. (we attempt to give Hiring Managers and Recruiters Job Admin levels to their assigned Greenhouse Jobs).
    - Ensure that the default **Job Admin: Standard** and **Job Admin: Private** levels have not been removed or renamed.
    - If the customer has a custom **Job Admin** role level instead in Greenhouse (thereby the default Job Admin levels above do not exist):
        - Ensure that the **Job Admin** role level they want to give to Hiring Managers includes the word "Hiring Manager" (e.g., could be called "ChartHop Hiring Manager").
        - Ensure that the **Job Admin** role level they want to give to Recruiters includes the word "Recruiter" (e.g., could be called "ChartHop Recruiter").
4. Ensure that your departments and teams match between ChartHop and Greenhouse. When matching departments and teams between ChartHop and Greenhouse, the integration attempts to match on both the name, but also any aliases that exist in ChartHop.
5. Confirm that your **Job Templates** names are an **exact** match between ChartHop and Greenhouse.
6. Check whether you have changed the standard required fields in Greenhouse (e.g., if you have set a non-standard default or custom field to be required for job creation)
    - If you have changed the required fields, contact your ChartHop implementation specialist so that they may ensure that your fields get mapped and passed in

correctly.

7. Confirm your **Greenhouse ID** matches the greenhouse Job Id/opening ID combination. To find the opening ID, you can export Greenhouse Jobs from the apps page, or reach out to **support@charthop.com**. Manually editing the GreenhouseID in ChartHop will change what job it is connected to.

Greenhouse comes with a set of default options for Employment types. If you change the Employment type options in your Greenhouse instance, please contact **support@charthop.com** in order to configure them appropriately.

Why did the new hire data flow fail?

In the case a hiring fails, you can check the following:

1. Confirm that an email has been provided for the candidate (either personal or work email).
2. Ensure that the Greenhouse Job ID field is mapped to the correct job. You can contact **support@charthop.com** if you need assistance with this (we do not recommend changing this field manually).
3. Be aware that we do not support internal transfers. If a marked new hire in Greenhouse already fills another job in ChartHop, we recommend instead manually transferring the internal transfer in ChartHop directly.

Job codes

How does job code matching work by default?

Job code matching works in the following ways:

1. If a job in ChartHop has a job code attached to it, then when syncing to Greenhouse, the integration attempts to match the jobCode.code to the Greenhouse Job's Requisition ID.
2. If a match is found, an opening is created underneath that Greenhouse Job, and the [jobCode.name](<http://jobCode.name>) syncs over to the Greenhouse Job name INSTEAD of the ChartHop Job title
3. If no match is found, the integration continues to use the default fallback logic (e.g., matching under Title, Title and location, or None).

For example, let's say there's a Greenhouse Job with Requisition ID of ENG-SR and title of Sr. Engineer. We create a job code in ChartHop, with the jobCode.code being ENG-SR and [jobCode.name](<http://jobCode.name>) of Senior Engineer:

- If we attach the job code to a ChartHop Job that has the job title of Engineer II , when syncing over to Greenhouse, the integration creates an opening to match underneath the existing Greenhouse Sr. Engineer job due to a match on the Requisition ID (ENG-SR):
    - Then, the job title in Greenhouse changes to Senior Engineer to match the ChartHop jobCode.name.
    - For this reason, we generally expect users to keep job codes consistent with existing Greenhouse Jobs.

Can I match by job code and still map a ChartHop Job Title to a Greenhouse Job Title?

Yes you can! This can be done by disabling the `jobcode_name` to `job.requisition_name` field mapper in Greenhouse. For additional help with field mappings, please contact support at **support@charthop.com**

By doing so, the expected behavior is the same as the above, however, ChartHop won't utilize the job code name and instead uses ChartHop Job Title.

For example, if you have an Operations Associate job in ChartHop with a job code attached that has a job code name of Operations Roles:

- If ChartHop matches using the jobcode to a Greenhouse Job, then we'll utilize the ChartHop Job Title Operations associate instead of the job code name of Operations Roles.
- If ChartHop doesn't find any matches, it creates a new Greenhouse Job, passing in:
    - The jobcode.code as the Greenhouse Requisition ID
    - The ChartHop Job Title as the Greenhouse Job Title

Job status

Why was the Recruit status for a ChartHop job changed to Pending?

Recruit status can change to **Pending** for one of three reasons:

1. The status was manually changed.
2. The integration received a new hire webhook (pending new hire) for the job.
3. Changing the Offer Accept Date effectively dates Recruit status changing to Pending on the date selected for the offer acceptance date.

ATS Setup

How should I support the setup for my ATS when there are different Departments or Teams between my ATS and payroll system?

The best practice is to leverage aliases. When aliases are present, if the Department or Team name doesn't work, ChartHop attempts with aliases, next.

For example, if the Department in Greenhouse is Contractor but the Department in ChartHop is Contract, if there is an alias attached to the ChartHop Department called Contractor, ChartHop will be able to sync into Greenhouse's Contractor department.

New hire data

What does the new hire data webhook pull in? Can I pull in custom fields?

This can be referenced in the field mappers table, with anything from the candidate or offer endpoints



Webhook field mappers

We also support additional custom field mapping to custom fields in Greenhouse that are tied to the offer object in Greenhouse.

4.4.3.2. Lever Requisitions

The Lever Requisitions app supports a seamless transition from planning to recruiting and hiring by flowing open jobs and new hire data between ChartHop and Lever.

The Lever Requisitions app allows you to leverage the strengths of both the Lever and ChartHop platforms in the following collaborative ways:

- Ensures talent and leadership teams:
  - Align on hiring goals.
  - Keep job data up to date.
  - Keep new hire data up to date.
- Automatically updates the org chart in ChartHop with every new hire. As soon as a candidate is hired in Lever, ChartHop's org chart updates to reflect the new hire with no manual steps or delays.

> In compliment to the ATS integration, ChartHop provides a bundle of pre-made **Recruiting Reports** available in the **Bundles** page .

> The Lever Requisitions app only interacts with Lever requisitions and not with Lever job postings.

Lever ATS integration app summary

The following table summarizes ChartHop's Lever Requisitions integration app:

Features	Summary
ChartHop packages	**Standard*** | **Premium** * Available as an add-on
Installation requirements	Syncing data between Lever and ChartHop requires: • Access to Lever Requisition Management • Lever API Credentials • Candidate Hired Webhook in Lever Your Lever software must include the Requisition Management add-on. This add-on is included in LeverTRM for Enterprise or in LeverTRM with the AdvancedHR add-on.
Data direction	**Inbound or Outbound** You can choose one of two ways to configure your Lever Requisitions integration: 1. **Outbound, ChartHop to Lever**: ChartHop is the source of truth for open requisitions. 2. **Inbound, Lever to ChartHop**: Lever is the source of truth for open requisitions. In all cases, candidate information for new hires flows inbound, from Lever to ChartHop.

Sync cadence	**Varied**
	
	Sync cadence of the Job Data Flow differs by configuration:
	1. **Outbound, ChartHop to Lever**:
	  1. Trigger-based (default) syncs when a requisition creation or update is merged to your primary organization with an **Active** recruiting status.
	  2. Daily syncs.
	  3. Ad-hoc syncs.
	2. **Inbound, Lever to ChartHop**:
	  1. Daily syncs.

Features	Summary
	2. Ad-hoc syncs. Sync cadence of candidate information for new hires happens on a trigger-basis when candidates are marked as Hired in Lever.

Synced data	• Created open roles
	• Updates to roles
	  ◦ Closed roles
	  ◦ Changes to role details and statuses
	• Hired candidates
	• Recruiting metrics
	  ◦ Candidates
	  ◦ Screens
	  ◦ Interviews
	• Metrics fields:
	  ◦ Screens as defined as any stage in Lever that contains the words “screen” or “phone interview”.
	  ◦ Interviews as defined as any stage in Lever that contains the word “interview”.
	  ◦ Offers as defined as any stage in Lever that contains the word “offer”.
	  ◦ Hires as defined as any stage in Lever that contains the word “hire”.

Effective dating support?	No
Custom field mapping support?	Support for custom field mapping to jobs fields is available. For assistance, please direct all custom mapping requests to ChartHop’s Professional Services team.

4.4.3.2.1. Job and new hire data fields

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

The Lever Requisitions integration app flows job data between ChartHop and Lever according to specific field mappings.

If you need help with mapping additional data, contact ChartHop's Professional Services team.

Mapped job data between ChartHop and Lever

The following fields are used during an inbound or outbound data flow:

ChartHop field	Lever field
req	jobs.requisitionCode
sensitive	jobs.confidentiality
title	jobs.name
employment	jobs.employmentStatus
department	jobs.department
team	jobs.team
location	jobs.location
hiremgr	jobs.hiringManager
recruiter	jobs.owner
currency, base	jobs.compensationBand.max, jobs.compensationBand.currency, jobs.compensationBand.interval
recruit	jobs.status

Mapped new hire data

The following fields are used during a new hire webhook data flow:

ChartHop field	Lever field
name	candidate.name
homeEmail	candidate.emails
mobilePhone	candidate.phones
startDate	offer.anticipated_start_date
base	offer.salary_amount
currency	offer.compensation_currency
grantShares	offer.offered_equity

4.4.3.2.2. Setting up the Lever integration

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

This section covers the process for setting up your Lever Requisitions integration app to begin migrating requisition data between Lever and ChartHop.

Setting up the Lever Requisitions integration app requires the following steps:

1. Create a Lever API key
2. Install the Lever integration app
3. Set up the API connection
4. Set up the flow of requisition data
5. Set up the flow of new hire data

> ATS integrations are typically done with help from ChartHop's professional services. Contact your implementation specialist before beginning these steps.

Create a Lever API key

In order for ChartHop to access your organization's Lever recruiting data, you need to create a Lever API key that you can use with ChartHop. You can work with your **Lever Requisitions** administrator if you have questions.

To create your API key, follow the steps outlined in the ***Generating API Credentials in Lever***. Use the instructions in the Lever documentation to create your API key and use the following values when doing so.

Field	Value
Key name	ChartHop
Select a preset	Select all read
Description	Leave this blank

After you name your key and enable all of its read permissions, you need to configure the key's write permissions.

Enable the following write permissions:

- Create requisitions
- Delete requisitions
- Update posting
- Update requisition fields

Install the Lever Integration App

Once you've created your API key in Lever, you can install the Lever integration app in ChartHop.

To install the Lever Requisitions integration app:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.
4. Scroll the list down to the **Lever Requisitions** app.
5. Select **Install**.
6. Select **Install** from the app install page.

Set up the API connection

In order to allow ChartHop to access your Lever data, enter your Lever API credential in the **Lever Requisitions API Key** field in the **Settings** section of the app. Then, select **Save Settings**.

Set up the flow of requisition data

Once you establish your API connection, you can configure the type of requisition data flow that the integration runs.

Select your source of truth

When setting up your integration, you can choose the primary source of truth when referencing new requisition data. Selecting ChartHop results in an outbound job data flow where ChartHop is the source of truth, whereas, selecting Remote System (Lever Requisitions) results in an inbound job data flow where the ATS is the source of truth.

To select your **Lever Requisitions** integration's source of truth:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Lever Requisitions** app.
5. Select the **Lever Requisitions** app.
6. From the ChartHop **Lever Requisitions** app settings page, scroll down to the **Source of Truth** section.
7. Select one of the two options:
    1. **ChartHop** - ChartHop is the source of truth and the integration is configured to run an outbound job data flow.
    2. **Remote System (Lever Requisitions)** - Lever is the source of truth and the integration is configured to run an inbound job data flow.

Configure the Lever Requisitions integration

You can configure the Lever Requisitions integration app to handle two types of data migrations (job data flows) between ChartHop and Lever Requisitions. Depending on the type of job data flow you choose, you may enable specific configurations that may either be required or optional and yet, recommended.

These are the required and recommended configurations for each job data flow:

Job data flow type	Configurations
Outbound, ChartHop to Lever	**Required** • Sync On Change **Recommended** • Run Daily
Inbound, Lever to ChartHop	**Required** • Reverse Sync **Recommended** • Run Daily • Remote Location As Default

To and change the configuration options for your Lever Requisitions integration:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Lever Requisitions** app.
5. Select the **Lever Requisitions** app.
6. From the ChartHop **Lever Requisitions** app settings page, scroll down to the **Other Options** section.
7. Select from the following configuration options described in the table below.

After you select your integration’s source of truth, you can select additional options to further customize and configure it:

Field	Description
Run Daily	With this option enabled, the ATS app runs automatically every day. When enabled, regardless of data direction, job-related candidate metrics are pulled on a daily basis every morning. For customers on the inbound job data flow direction, this also causes the inbound job data flow to run on a daily basis every morning.
Sync On Change	Enables the outbound job data data flow direction. When enabled, changes to open jobs are automatically pushed to Lever as soon as they are made in ChartHop. This option cannot be selected when **Reverse Sync** is enabled.
Reverse Sync	When enabled, Lever becomes the system of record, and ChartHop is updated with new open roles from Lever when the inbound job data flow runs. This option cannot be selected when **Sync On Change** is enabled.
Reconciliation	When enabled, reconciles Lever role and field data with ChartHop, treating ChartHop as the source of truth. For example, if an open job exists in ChartHop but not in Lever, a matching req is created in Lever. Reconciliations can either happen on an ad-hoc basis or on a daily basis if the **Run daily** option is enabled. This option cannot be selected when **Reverse Sync** is enabled.
Remote Location As Default	When enabled, newly synced records that are not assigned a location are assigned the value Remote Location.

Set up the flow of new hire data

You can use the new hire webhook job data flow to automatically bring new hires from Lever to ChartHop when the candidate is marked as “Hired” in Lever, along with their relevant personal information, such as address, phone number, and email.

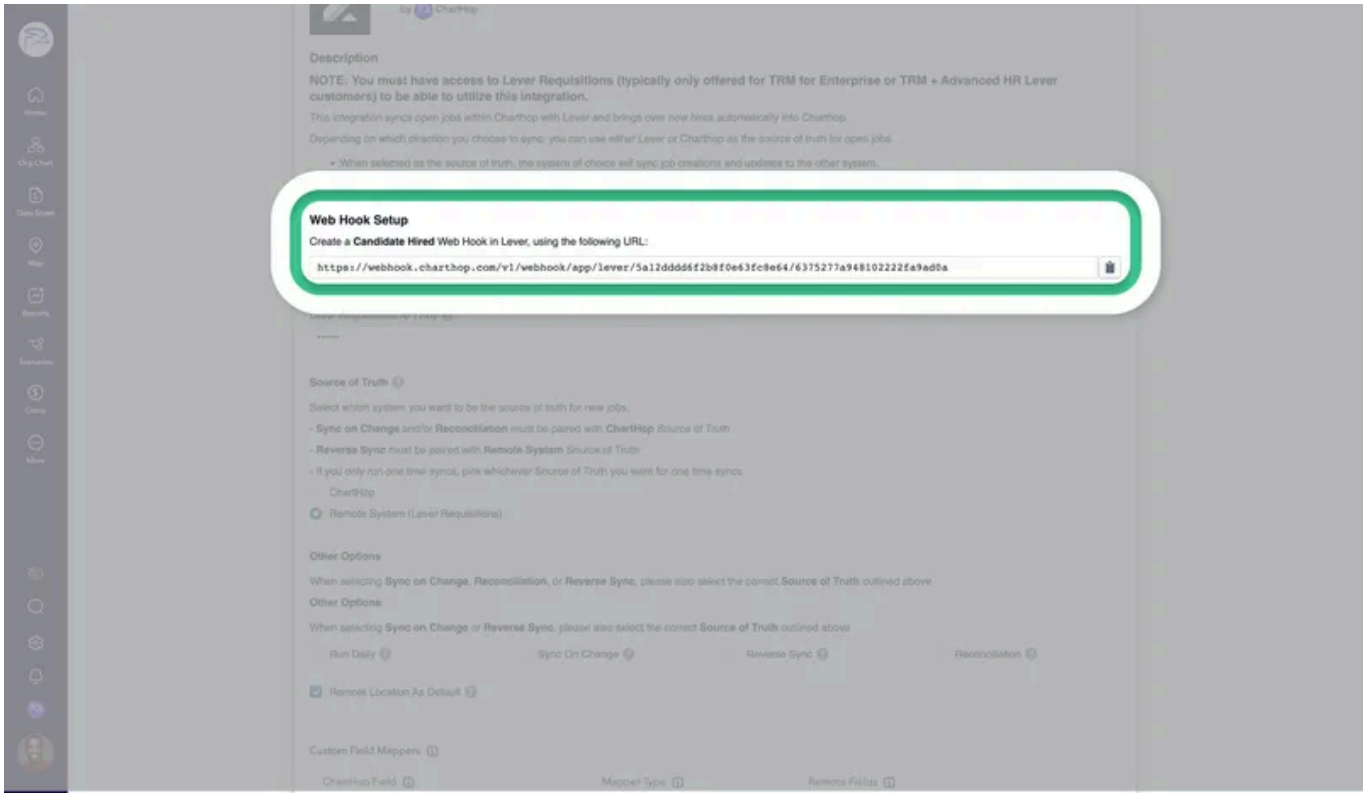
New hire webhooks will not be processed if the person being hired already exists in ChartHop, even if they aren't actively in a role. As a result, the integration cannot support:

- Internal transfers
- Re-hires

Only the first new hire webhook for a ChartHop job is supported. For example, if they you update an offer packet and re-hire the candidate in Lever, the updated information will not be processed in ChartHop unless the new hire in ChartHop is removed first.

A new hire webhook will not be processed if the job does not exist in ChartHop.

> All new hire webhook job data flows are inbound (Lever to ChartHop).



Copy your created API key to enable your web hook in Lever.

To configure the new hire webhook job data flow, follow the steps below.

In ChartHop:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.

4. Scroll the list down to the **Lever Requisitions** app.
5. Select the **Lever Requisitions** app.
6. From the ChartHop **Lever Requisitions** app settings page, copy the secret key value under **Webhook Setup**.

In Lever:

1. Navigate to **Integrations and API** under Settings.
2. Select **Webhooks**.
3. Enable **Candidate Hire** to on.
4. Add the webhook.
5. Select **Verify Connection**.

With the webhook enabled, accepted offers in Lever are pulled into ChartHop, alongside the new hire's start date, and contact information.

4.4.3.2.2.1. Customizing the integration

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

With custom field mappers, you can configure your integration to better match your job data between ChartHop and Lever.

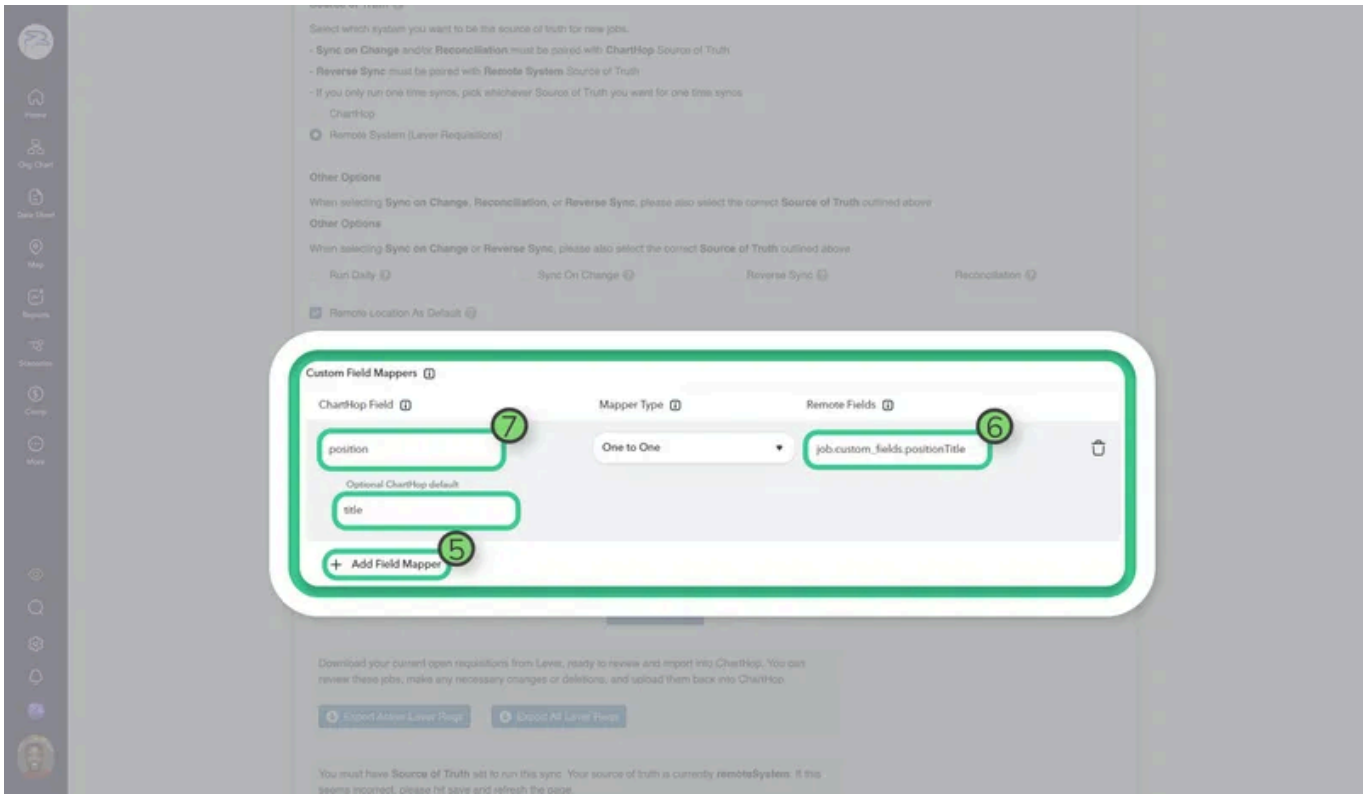
Create custom field mappers

You can map additional Lever fields to add or change what data is given to ChartHop.

Keep in mind that there are some exceptions, so for more information about managing custom field mappings, please contact your ChartHop implementation specialist.

You can use custom field mappers to override the default field mappings. For example, you can pull a custom field into a ChartHop default field, or vice versa (to push a ChartHop custom field into a default field on Lever). Similarly, you can disable default field mappers.

> Group fields like Department, Team, and Location cannot be custom mapped.



You can use custom field mappers to override the default field mappings.

To create a custom field mapper, follow these steps:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Lever Requisitions** app.
5. Select the **Lever Requisitions** app.
6. From the ChartHop **Lever Requisitions** app settings page, scroll down and select the **Add Field Mapper** button.
7. Enter your Lever custom field **Code name** under **Remote Field**, appended with the correct endpoint.
    - To ensure that your Lever field parses correctly, your **Remote Fields** must be preceded by the correct endpoint (job., offer., etc.), and structured as follows:
        - The endpoint (such as job) + custom_fields. + your Lever Immutable Field.
8. In the **ChartHop Field**, enter the field or Carrot expression you wish to map to the previously entered Lever custom field.

As an example, if you wanted to map a ChartHop custom field like *targetSalary* to the Lever custom field *targetBase*, then you'd want to set up your field mapper like in the image

4.4.3.2.2.2. Adding Lever Requisitions

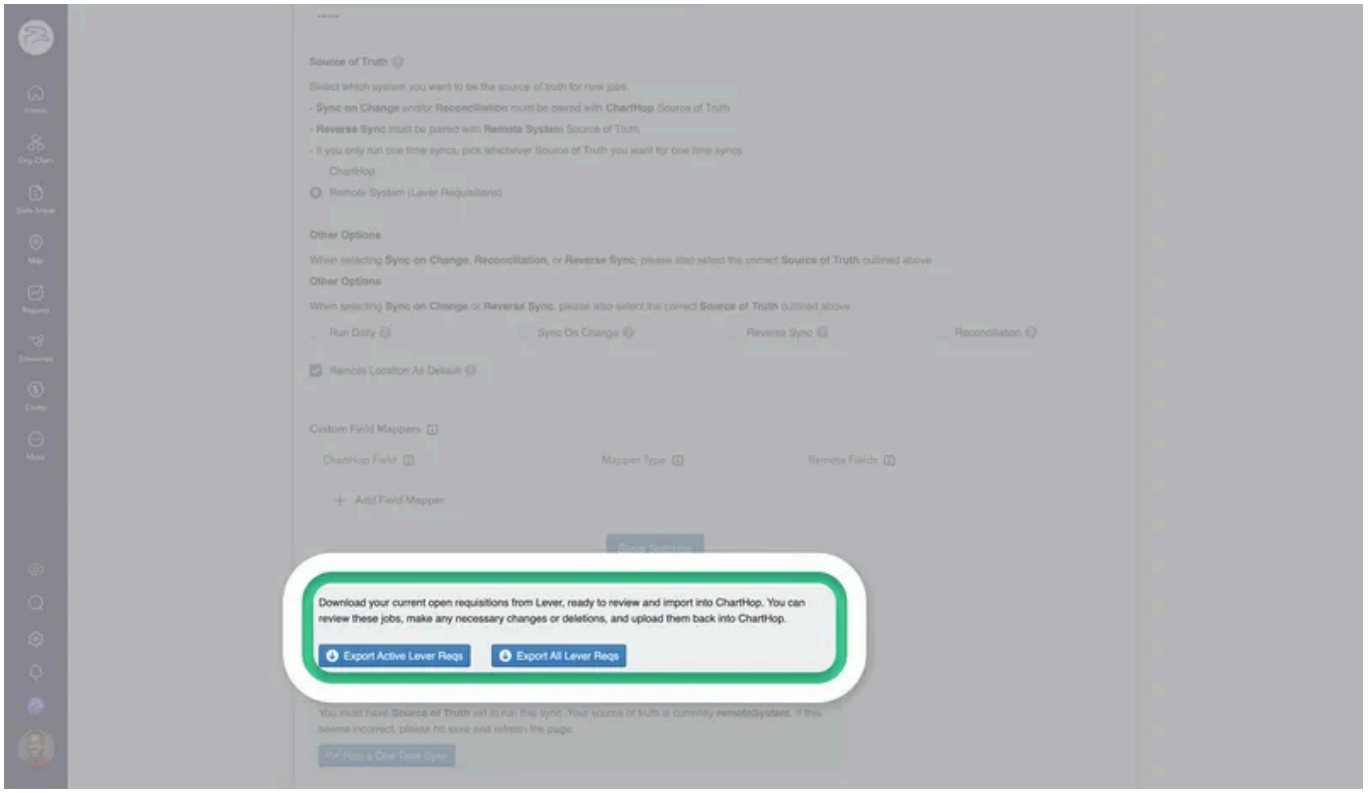
> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

When you configure ChartHop to be the source of truth (outbound data flow), you can choose to import any previously existing Lever requisitions into ChartHop.

This is a two-step process. First, you'll use ChartHop's Lever Requisitions application to export your existing jobs and then use ChartHop to import your exported jobs to ChartHop using a CSV file.

> Exporting Lever requisitions are only for outbound data flows.

You can choose add all jobs, including those that are not active, or just import your active jobs from Lever Requisitions.



Export your Lever data by selecting the Export Active Lever Res button

Use the app to export existing Lever requisitions to a CSV

To export Lever requisitions follow these steps:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Lever Requisitions** app.
5. Select the **Lever Requisitions** app.
6. From the ChartHop **Lever Requisitions** app settings page, select either:
    - **Export Active Lever Reqs**, to include only **Open** Lever requisitions.
    - **Export All Lever Reqs**, to include all Lever requisitions including **Closed**, **On Hold**, and **Hired**.
7. Save the .csv file.

Verify your exported roles

Before you import Lever requisitions into ChartHop, follow these steps to clean the .csv:

1. Open the .csv in Excel or Google Sheets.
2. Remove any roles that aren't on your hiring plan, for example test jobs and inactive roles.
3. Ensure that every role has a value for Manager. You should also set target comp (Base and Variable) for the roles if possible.
4. Ensure that the list of roles is correct and up to date, and reflects what you want imported into ChartHop as the new source of truth for your hiring plan

Import your Lever requisitions to ChartHop

Save the edited file as a .csv or .xlsx and upload it on the ***Import Spreadsheet*** page in ChartHop.

Once the upload is complete, the hiring plan of open jobs in ChartHop should mirror the hiring plan of open reqs in Lever. From this point forward, you can use ChartHop as the system of record for open roles.

4.4.3.2.3. ChartHop as the source of truth

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

With an outbound job data flow, ChartHop is the source of truth and the database of record.

Hiring data is entered and updated in ChartHop, and is then sent from ChartHop to the ATS using event-based trigger flows which update the information in the ATS immediately.



Open reqs data flows Outbound, while new hires data flows inbound.

In an Outbound job data flow, open job and req data flow *outbound* from hiring plans in ChartHop to the ATS. This helps recruiting teams using ChartHop for headcount planning to move data seamlessly from the approved headcount plan into their recruiting system. However, once a hire is made in the ATS, that new hire data flows *inbound* from the ATS into ChartHop.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Then, once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of Outbound job data flows

Outbound job data flows offer several advantages over inbound job data flows including:

- The immediate and real-time syncing of information.

- Allowing headcount planning and execution (for example, hiring against the headcount plan) to all take place within ChartHop.
- Allowing hiring managers (or recruiters, or even other stakeholders such as finance) to collaboratively propose and make changes to open jobs automatically without needing to access the ATS.

Outbound job data flows are recommended if:

- You utilize ChartHop for headcount planning and/or being the source of truth for the hiring plan.
- You have simple to standard ATS workflows where ChartHop can fulfill most of the data needs.
- You are looking for real-time visualization across both systems.
- You need more collaboration when managing new jobs.

4.4.3.2.3.1. Using ChartHop to open jobs

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

When you configure your Lever Acquisitions app to have an outbound flow, ChartHop serves as the primary source of truth for open jobs. Depending on the status of a job in ChartHop, it translates to a specific status for the same job in Lever.

Open job creation recommendations

When you use ChartHop to open jobs in an outbound data sync, there are a few things to note:

- Syncing outbound from ChartHop to Lever bypasses approval workflows in Lever. As a result, you should leverage scenarios in ChartHop when proposing new open roles or edits to open roles.
- Lever requisition field values are updated to ChartHop's if any changes are made, therefore you should only make changes in ChartHop to mapped fields as opposed to directly in Lever.
- Only one Location is accepted in Lever, so if multiple Locations are present in ChartHop, only the first Location will be passed into Lever.
- A department in ChartHop cannot be mapped to a custom Lever field, and a custom field in ChartHop cannot be mapped to Lever Department.

Outbound job status mappings

ChartHop job statuses map to Lever job statuses in the following ways:

ChartHop status	Direction	Lever status
Active	➡	Open
Passive	➡	On hold
Inactive	➡	On hold
Pending	⬅	Hired
Offer	➡	Open
Closed	➡	Closed

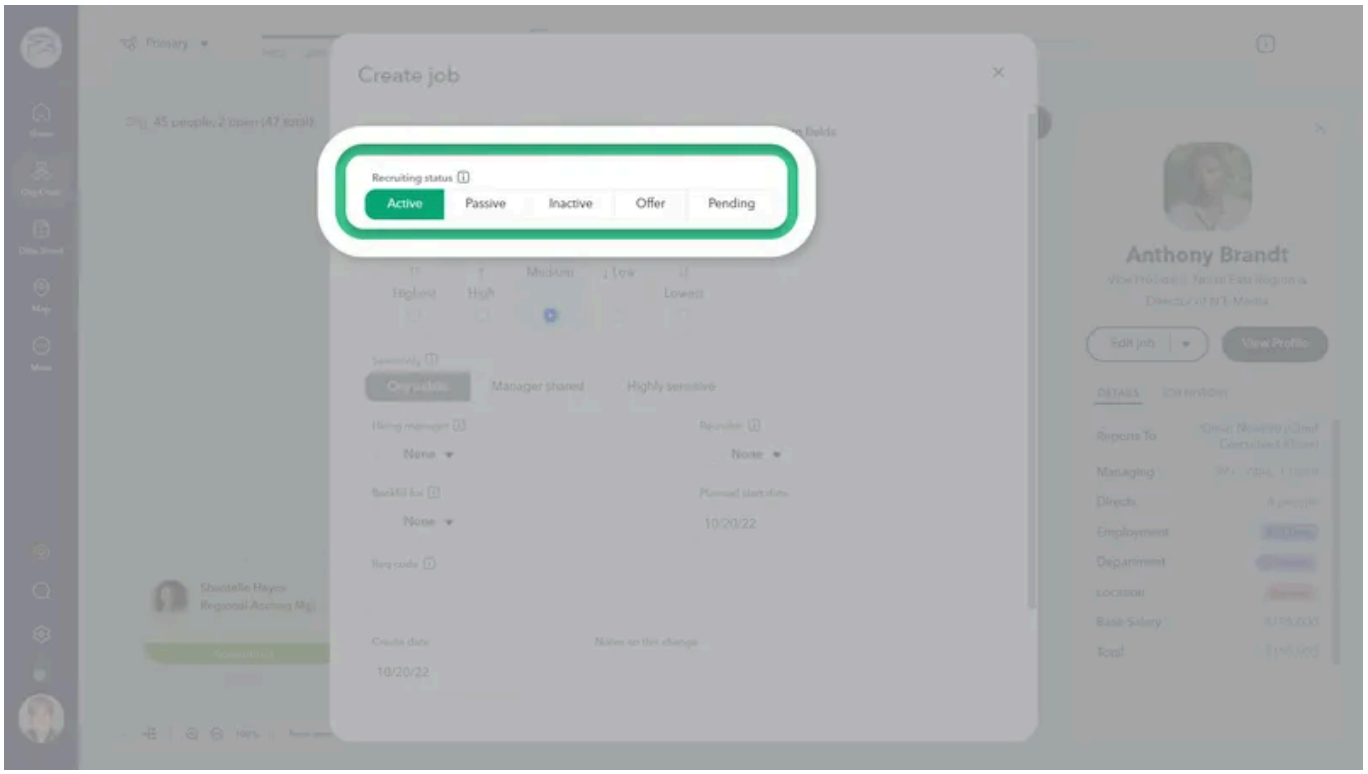
Create a job

With the Lever Requisitions app enabled, ChartHop's open jobs list becomes the system of record for open jobs. Recruiters, hiring managers, financial planners, and team leads can all look at ChartHop for a real-time view of which roles are open and how recruiting is going without needing access to Lever.

> To avoid potential org data issues, we recommended that you create new jobs via scenarios as opposed to directly in Primary.

When an open job in ChartHop is set to **Active** recruiting status (either when someone creates or updates a new job), a req code is automatically created in Lever if not provided in ChartHop manually. The mapped Lever requisition is changed to **On Hold** in Lever if the open job is set back to an inactive status. Similarly, when the job is removed from ChartHop, it is deleted in Lever.

> If you create a new job in ChartHop with a recruiting status set to **Active** without a req code, a new req code is automatically generated by looking through the most recent req codes for that department, and incrementing the number (for example, from ENG-8 to ENG-9).



Setting a job as Active in ChartHop opens a new job in Lever.

To create a new job in ChartHop, follow these steps:

1. From the left sidebar, select **Org chart**.
2. In the **Org chart**, create a new job by either:
    1. Adding a direct report by selecting **Add a direct report** under a pre-existing person or role.
    2. Creating a new job by selecting **New hire** under a pre-existing person or role.
3. In the **Create job** dialog enter your information for the new role using your custom fields and ChartHop's recommended fields beneath the following tabs:
    - **Structure** - General information about the role, including title, department, and location.
    - **Compensation** - Compensation information about the role, including salary and bonuses.
    - **Recruiting** - Recruiting information about the role, including hiring status and start date.
    - **Description** - A general description about the role.

Once a candidate is hired in Lever, the job in ChartHop is set to **pending status**, and the hired candidate is announced in ChartHop, with their start date being the specified start

date in the Lever offer.

Job hiring status

Any open roles with a **Recruiting status** set to **Active** in ChartHop flow from ChartHop to Lever. Mapped Lever Requisitions are placed **On Hold** in Lever if the mapped ChartHop job is changed to an **Inactive** or **Passive** status in ChartHop. The mapped Lever Requisition is deleted if the ChartHop job is removed.

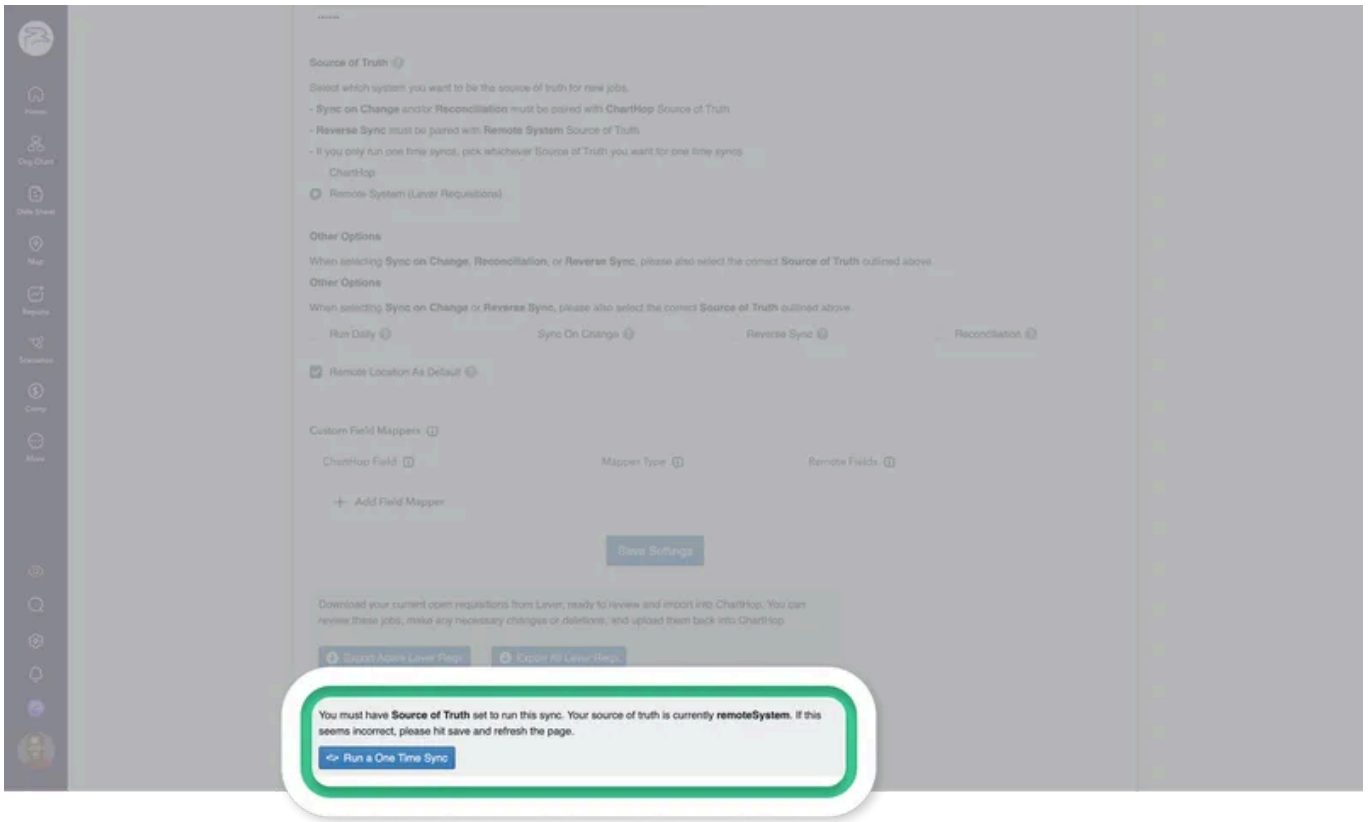
ChartHop job status	**Result in Lever**
Active or Offer	A new **Open** Lever requisition is automatically created.If the ChartHop Job was already mapped to an existing Lever Requisition, the Lever requisition is set to **Open.**
Inactive or Passive	The Lever requisition is set to **On Hold**.
Removed job	The Lever requisition is deleted.
Pending	The Lever requisition is set to **Closed.** We do not recommend changing the ChartHop job status to Pending manually. Rather, when a candidate is hired in Lever, the ChartHop Job status is automatically changed to **Pending** to reflect the hire.

Reconcile data

You can fix any data discrepancies by forcing ChartHop to reconcile data with Lever outside of a regularly scheduled sync To handle these cases in bulk, you can enable the Lever Requisitions integration app's **Reconciliation** feature.

During a data reconciliation, ChartHop bulk changes all Lever requisitions to match what is in ChartHop. With **Run Daily** enabled in the Lever Requisitions integration app configuration settings, reconciliations are triggered on a daily basis. You may also manually trigger the

reconciliation by selecting the **Sync Jobs** button located at the base of the app settings page.



Select the Run a One Time Sync button to manually trigger a reconciliation.

> Reconciliations are only available for outbound job data flows.

To manually run a data sync reconciliation:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Lever Requisitions** app.
5. Select the **Lever Requisitions** app.
6. From the ChartHop **Lever Requisitions** app settings page, scroll down to the bottom of the settings page.
7. Select **Sync Jobs**.

4.4.3.2.4. Lever as the source of truth

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

An inbound job data flow brings open jobs from the ATS to ChartHop where the ATS is the source of truth. Inbound data flows support both on-demand syncs and scheduled daily syncs. In most cases, you can rely on daily syncs to pull updated hiring data from your ATS.

Data remains in and is updated within the ATS system. A daily sync pulls information from the ATS to ChartHop. You can also stream data ad-hoc through an on-demand **Sync Jobs** button that can be accessed within the ATS application configuration page in ChartHop.



Open reqs and new hire data flow Inbound.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of inbound job data flows

Inbound job data flows offer a few advantages over outbound job data flows which include:

- Recruiting teams only having to work out of the ATS.
- No changes are required to your standard hiring workflow.

- The process is often easier to start with and implement for first-time users.

Inbound job data flows are recommended if:

- You don't plan on using ChartHop as the source of truth for your hiring plan.
- You work with a team that is very comfortable with their current ATS workflow.
- You have specific data needs with your ATS that ChartHop can’t fulfill such as highly unique systems and data types.
- You do not plan to give recruiters access to ChartHop.

4.4.3.2.4.1. Using Lever to open jobs

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

When you configure your Lever Acquisitions app to have an inbound flow, Lever serves as the primary source of truth for open jobs. Depending on the status of a job in Lever, it translates to a specific status for the same job in ChartHop.

When you open a job in Lever, that job is also created and opened in ChartHop. As a result, any changes you make to open roles in ChartHop are not reflected in Lever.

If a requisition is marked as Confidential in Lever, it is marked as Highly Sensitive when it is pulled into ChartHop.

The status changes between ChartHop and Lever are reflected in the following table:

Lever status	Direction	ChartHop status
Open	➡	Active
On hold	➡	Inactive
Draft	➡	Inactive
Hired	➡	Pending
Closed	➡	Inactive

If there are already open ChartHop jobs and an inbound sync occurs, unmapped Lever Requisitions are first attempted to be matched to existing open jobs in ChartHop by matching on title and manager.

Lever status	Result in ChartHop
Open	A new **Active** job in ChartHop is automatically created. If the Lever requisition was already mapped to an existing job in ChartHop, the ChartHop job is set to an **Active** recruiting status.
On Hold, Draft, Closed	The ChartHop job is set to an **Inactive** recruiting status.
Hired	The ChartHop job is set to a **Pending** recruiting status.

4.4.3.2.5. Hiring candidates

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

Once you hire a candidate in Lever, a new hire is automatically created in ChartHop to fill the mapped job in Lever.

New hire triggers

The new hire data flow triggers whenever an individual is marked as **Hired** in Lever. The action fires a webhook to ChartHop, which provides ChartHop with the necessary information to pull in the pending hire. **Learn more**.

The Lever Requisition ID is used to map the Lever Requisition to the corresponding job in ChartHop.

If a job in ChartHop has not switched to **Pending** after the mapped Lever Requisition is hired into, you can manually add the new hire into ChartHop. Once the new hire is added to the HRIS system, the new hire information coming from the payroll system matches with and updates the pending new hire that is created in ChartHop from the new hire data flow.

New job hires

To finalize a job hire, before being moved into the Hired stage in Lever, a candidate must first go through the Offer stage in Lever (with the offer either being created or signed in Lever before being moved into the Hired stage).

While a candidate must go through the Offer stage in Lever, the option to send outside of Lever may be selected when creating the offer in Lever.

Note that even if the offer is sent outside of Lever, either the signed offer letter must be attached/uploaded into Lever or the "Mark offer as signed" option must be selected.

> We recommend that you select “Mark offer as signed”, as this way, a signed offer file does not need to be uploaded.

Set new hire announce dates

When candidates are hired and they are created in ChartHop, you have a choice about when you want them to show up publically to your organization

Under the option **New Hire Webhook Announce Date** select one of the following:

- **Start date** - The new hire will not be org public until their start date.
- **Today** - The new hire will be displayed immediately on the day of the sync
- **Earlier of start date and today (Default)**

4.4.3.2.6. Troubleshooting and FAQ

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

This section covers a series of potential issues you may run into when setting up or configuring your Lever Requisitions App in ChartHop, as well as their recommended solutions.

Permissions

Which ChartHop roles are required for creating and viewing open jobs?

There are two access levels in ChartHop specifically designed for Recruiters:

1. **Recruiting Editor** - These users are allowed to view and make changes to open jobs, including target compensation levels and sensitive jobs. They are not allowed to make changes to, or access sensitive data about current employees, other than those they manage. This permission is generally intended for Recruiting roles or those managing the ATS.
2. **Recruiters** - These users are allowed to view sensitive information about open jobs only, including target compensation levels and viewing all sensitive jobs. They are not allowed to make changes to the primary timeline, or access sensitive information about current employees other than those they manage.

Other access levels with the ability to open roles:

- **Org Editor** - These users are allowed to view all information, and make official, permanent changes to the primary timeline. This access should be restricted tightly and limited to a few authorized individuals in HR, Finance, or similar roles.
- **Owner** - These users are allowed full access to everything, including the ability to change user permissions, configure integrations, and alter organization-wide settings. Because of the scope involved, this access should be tightly restricted.

Metrics

Where are metrics coming from?

ChartHop, once daily, pulls a list of candidates in Lever, and updates metrics based on the stages that the candidates are in.

Job Data

Why did the job fail?

In case a jobs fails to be properly created, you can check for the following:

1. Confirm that your API and Webhook credentials are correct.
2. Confirm that your Hiring Manager and Recruiter have accounts in both ChartHop and Lever with the same email address.
3. Ensure that your teams match between ChartHop and Lever.
4. Ensure that there are no teams with the same name across different departments in Lever. Please contact **support@charthop.com** should this occur.

Why did a hiring fail?

In the case a hiring fails, you can check the following:

1. Confirm that an email has been provided for the candidate
2. Ensure that the Lever Req ID field is mapped to the correct job. You can contact **support@charthop.com** if you need assistance with this.
3. Be aware that we do not support internal transfers.

Data sync updates

When do updates for ChartHop to Lever job data flows push over?

Updates for ChartHop to Lever job data flows push over in the following cases:

- If a ChartHop Job has not already been mapped to a Lever Requisition (e.g., no value in ChartHop's Lever Req ID field), the initial sync will occur when the ChartHop Job is turned to Active recruiting status in Primary.
- If a ChartHop Job has already been mapped to a Lever Requisition (e.g., there IS a value in ChartHop Lever Req ID field), updates will sync over to Lever regardless of

recruiting status (e.g., even if marked to Inactive, updates will sync over to Lever).

When do ChartHop jobs get created for Lever to ChartHop job data syncs?

ChartHop jobs are created for Lever to ChartHop job data syncs in the following cases:

- If a Lever Requisition has not been mapped to a ChartHop Job, a new ChartHop Job will only be created if the Lever Requisition is Open.
- If a Lever Requisition has already been mapped to a ChartHop Job, updates will sync over to ChartHop regardless of status until the ChartHop Job is filled (after which no updates are synced).

How do I safely clean up roles that were accidentally duplicated during the sync?

Contact **support@charthop.com** to fix this.

ATS Setup

How should I support the setup for my ATS when there are different Departments or Teams between my ATS and payroll system?

The best practice is to leverage aliases. When aliases are present, if the Department or Team name doesn't work, ChartHop attempts with aliases, next.

For example, if the Team in Lever is Contractor but the Team in ChartHop is Contract, if there is an alias attached to the ChartHop Team called Contractor, we'll be able to sync into Lever's Contractor team.

Job status

Why was Recruit status changed to Pending?

Recruit status can change to Pending for one of three reasons:

1. Manually changing the status
2. Receiving a new hire webhook (pending new hire) for the job
3. Changing the Offer Accept Date will effective date Recruit status changing to Pending on the date selected for the offer acceptance date

4.4.3.3. Jobvite

The Jobvite integration app supports a seamless transition from planning to recruiting and hiring by flowing open jobs and new hire data between ChartHop and Jobvite.

You can leverage the strengths of both the Jobvite and ChartHop platforms in the following collaborative ways:

- Ensure talent and leadership teams:
  - Align on hiring goals.
  - Keep job data up to date.
  - Keep new hire data up to date.
- Automatically updates the org chart in ChartHop with every new hire. As soon as a candidate is hired in Jobvite, ChartHop's org chart updates to reflect the new hire with no manual steps or delays.

> In compliment to the ATS integration, ChartHop provides a bundle of pre-made **Recruiting Reports** available in the **Apps and Integrations** page .

Jobvite ATS integration app summary

The following table summarizes ChartHop's Jobvite's integration app:

Features	Summary
ChartHop packages	**Standard*** | **Premium** * Available as an add-on
Data direction	**Inbound or Outbound** The Job Data Flow within the app can be configured in one of two ways: 1. **Outbound, ChartHop to Jobvite**: ChartHop is the source of truth for open jobs. 2. **Inbound, Jobvite to ChartHop**: Jobvite is the source of truth for open jobs. In all cases, candidate information for new hires flows inbound, from Jobvite to ChartHop.
Sync cadence	**Varied** Sync cadence of the Job Data Flow differs by configuration: 1. **Outbound, ChartHop to Jobvite**: ◦ Trigger-based (default) syncs when a job creation or update is merged to your primary organization with an **Active** recruiting status. 2. **Inbound, Jobvite to ChartHop**: 1. Daily syncs. 2. Ad-hoc syncs. Sync cadence of candidate information for new hires happens on a trigger-basis when candidates are marked as Offer Accepted in Jobvite.
Synced data	• Created open roles • Updates to roles ◦ Changes to role details and statuses • Hired candidates • Recruiting metrics ◦ Candidates ◦ Screens

Features	Summary
	◦ Interviews
Effective dating support?	No
Custom field mapping support?	Yes, for the `Job` endpoint. Please direct all custom mapping requests to ChartHop's Professional Services team.
Installation Prerequisites	Syncing data between Jobvite and ChartHop requires: • Jobvite API Credentials • Candidate Hired Webhook Both need to be set up manually through the your Jobvite representative. **Learn More**.

4.4.3.3.1. Job and new hire data fields

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

The Jobvite integration app syncs job data between ChartHop and Jobvite according to specific field mappings.

> If you need help with mapping additional data, contact ChartHop's Professional Services team.

Mapped job data between ChartHop and Jobvite

The following fields are used during an inbound or outbound data flow:

ChartHop field	Jobvite field
req	job.requisitionId
title	job.title
description	job.description
description	job.briefDescription
employment	job.jobType
department	job.department
location	job.location
hiremgr	job.primaryHiringManagerEmail
recruiter	job.primaryRecruiterEmail
recruit	job.jobState

Mapped new hire data from Jobvite

The following fields are used during a new hire webhook data flow:

ChartHop field	Jobvite field
firstName	candidate.firstName
lastName	candidate.lastName
homeEmail	candidate.email
homePhone	candidate.homePhone
mobilePhone	candidate.mobile
startDate	offer.startDate

4.4.3.3.2. Setting up the Jobvite integration

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

This section covers the process of setting up your Jobvite integration app to begin migrating requisition data between Jobvite and ChartHop.

Setting up the Jobvite integration app requires the following steps:

1. Install the Jobvite integration app.
2. Create a Jobvite API Key/ Secret key and set up the flow of new hire data.
3. Set up the API connection.
4. Set up the flow of requisition data.

Install the Jobvite Integration App

To connect Jobvite to ChartHop, you can install the Jobvite integration app in ChartHop.

To install the Jobvite integration app:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.
4. Scroll the list down to the **Jobvite** app.
5. Select **Install**.
6. Select **Install** from the app install page.

Create a Jobvite API and Secret key

In order to create an API and Secret key for your Jobvite integration, you need to send some specified information to your Jobvite representative.

Field	Description
Webhook URL	The URL that is automatically generated in the integration app page. You can get to this page by adding temporary values into the API Key and Secret Key fields as part of the setup flow.
Creator Email	The email tied to any actions performed through the integration. Any changes made by the integration will display as being made by this user in Jobvite.

Create the Jobvite webhook

To receive your Jobvite API key, you need to generate a web hook address and send it to your Jobvite representative.

To generate the webhook, complete the following steps:

1. Navigate to the Jobvite integration app.
2. In the app's **Settings** section, enter the following:
    - A temporary value in the **API Key** field.
    - A temporary value in the **Secret Key** field.
    - Your **Creator Email**.
3. Select **Save Settings**.

After you save the app's settings, refresh the page. When the page refreshes, copy the newly created Webhook URL under the **Web Hook Setup** section in the app.

Contact Jobvite representative

ChartHop partners with Jobvite for this integration, and so you'll need to work with your Jobvite representative to obtain the required Jobvite credentials.

After you generate your webhook url, send an email to your Jobvite CSM with your custom Webhook URL and Creator Email using the following template:

```
We are beginning our integration with ChartHop and need an API key generated
for Charthop. (Please note that Charthop is a Jobvite partner)
```

The email I want to associate with the API activity is: [Email]

In addition, please help set up a candidate hired webhook to the following URL: [Webhook URL]

Please reply to this email with that information and ensure implementation@charthop.com is included. ChartHop has previously integrated with the Jobvite APIs and is CC'ed as the technical contacts and can answer any questions.

> Jobvite may require a zero dollar contract to be submitted in order to complete the API authorization request. Your Implementation Specialist can help you fill out and submit these forms.

Set up the API connection

Once you receive your API and Secret keys from Jobvite, enter your Jobvite API and Secret credentials in the **API Key** and **Secret Key** fields in the **Settings** section of the app. Then, select **Save Settings**.

Set up the flow of requisition data

Once you establish your API connection, you can configure the type of requisition data flow that the integration runs.

Select your source of truth

When setting up your integration, you can choose the primary source of truth when referencing new requisition data. Selecting ChartHop results in an outbound job data flow where ChartHop is the source of truth, whereas, selecting Remote System (Jobvite) results in an inbound job data flow where the ATS is the source of truth.

To select your **Jobvite** integration's source of truth:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.

4. Scroll the list down to the **Jobvite** app.
5. Select the **Jobvite** app.
6. From the ChartHop **Jobvite** app settings page, scroll down to the **Source of Truth** section.
7. Select one of the two options:
    1. **ChartHop** - ChartHop is the source of truth and the integration is configured to run an outbound job data flow.
    2. **Remote System (Jobvite)** - Jobvite is the source of truth and the integration is configured to run an inbound job data flow.

Configure the Jobvite Requisitions integration

You can configure the Jobvite integration app to handle two types of data migrations (job data flows) between ChartHop and Jobvite. Depending on the type of job data flow you choose, you may enable specific configurations that may either be required or optional but recommended.

These are the required and recommended configurations for each job data flow:

Job data flow type	Configurations
Outbound, ChartHop to Jobvite	**Required** • Sync On Change **Recommended** • Run Daily
Inbound, Jobvite to ChartHop	**Required** • Reverse Sync **Recommended** • Run Daily • Remote Location As Default

To establish the configuration settings for your Jobvite Requisitions integration:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.

3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Jobvite** app.
5. Select the **Jobvite** app.
6. From the ChartHop **Jobvite** app settings page, scroll down to the **Other Options** section.
7. Select from the following configuration options described in the table below.

After you select your integration's source of truth, you can select additional options to further customize and configure it:

Field	Description
Run Daily	With this option enabled, the ATS app runs automatically every day. When enabled, regardless of data direction, job-related candidate metrics are pulled on a daily basis every morning. For customers on the inbound job data flow direction, this also causes the inbound job data flow to run on a daily basis every morning.
Sync On Change	Enables the outbound job data data flow direction. When enabled, changes to open jobs are automatically pushed to Jobvite as soon as they are made in ChartHop. This option cannot be selected when **Reverse Sync** is enabled.
Reverse Sync	When enabled, Jobvite becomes the system of record, and ChartHop is updated with new open roles from Jobvite when the inbound job data flow runs. This option cannot be selected when **Sync On Change** is enabled.
Remote Location As Default	When enabled, newly synced records that are not assigned a location are assigned the value **Remote Location**.
Publish Requisition On Creation	When enabled, open jobs that are pushed to Jobvite will automatically be published on career sites (both internal and external).

Set up the flow of new hire data

You can use the new hire webhook job data flow to automatically bring new hires from Jobvite to ChartHop when the candidate is marked as “Filled” or “Offer Accepted” in Jobvite, along with their relevant personal information, such as address, phone number, and email.

The new hire webhook will be added to your integration at the same time as when you contact your Jobvite CSM for the API and Secret keys, as part of the same email request. Likewise, you will need to contact your Jobvite CSM if you wish to have your Webhook access removed in the future.

> In order to process the new hire in Charthop, the candidate must have an email address in Jobvite.

New hire webhooks will not be processed if the person being hired already exists in ChartHop, even if they aren’t actively in a role. As a result, the integration cannot support:

- Internal transfers
- Re-hires

Only the first new hire webhook for a ChartHop job is supported. For example, if you update an offer packet and re-hire the candidate in Jobvite, the updated information will not be processed in ChartHop unless the new hire in ChartHop is removed first.

A new hire webhook will not be processed if the job does not exist in ChartHop.

4.4.3.3.2.1. Customizing the Jobvite app

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

With custom field mappers, you can configure your integration to better match your job data between ChartHop and Jobvite.

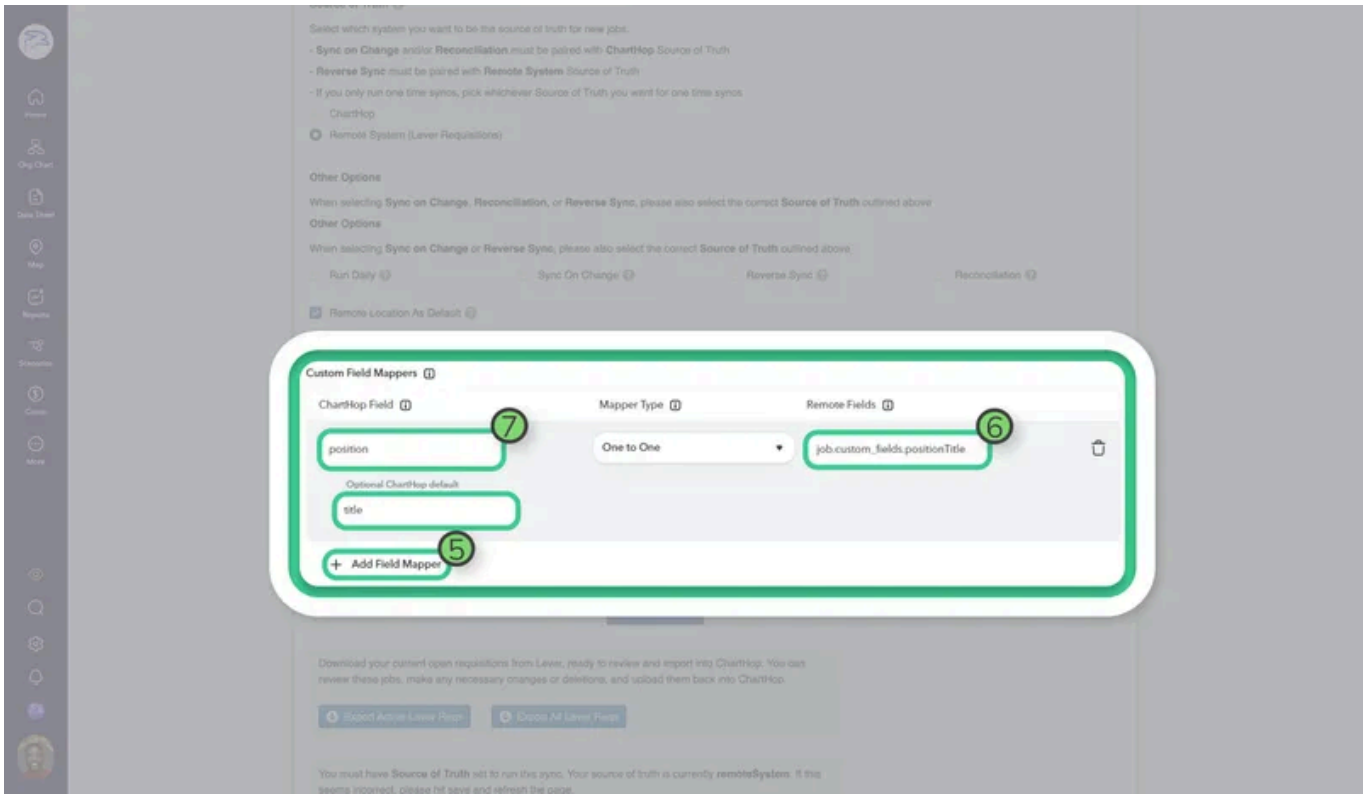
Create custom field mappers

You can map additional Jobvite fields to add or change what data is given to ChartHop.

Keep in mind that there are some exceptions, so for more information about managing custom field mappings, please contact your ChartHop implementation specialist.

You can use custom field mappers to override the default field mappings. For example, you can pull a custom field into a ChartHop default field, or vice versa (to push a ChartHop custom field into a default field on Jobvite). Similarly, you can disable default field mappers.

> Group fields like Department, Team, and Location cannot be custom mapped.



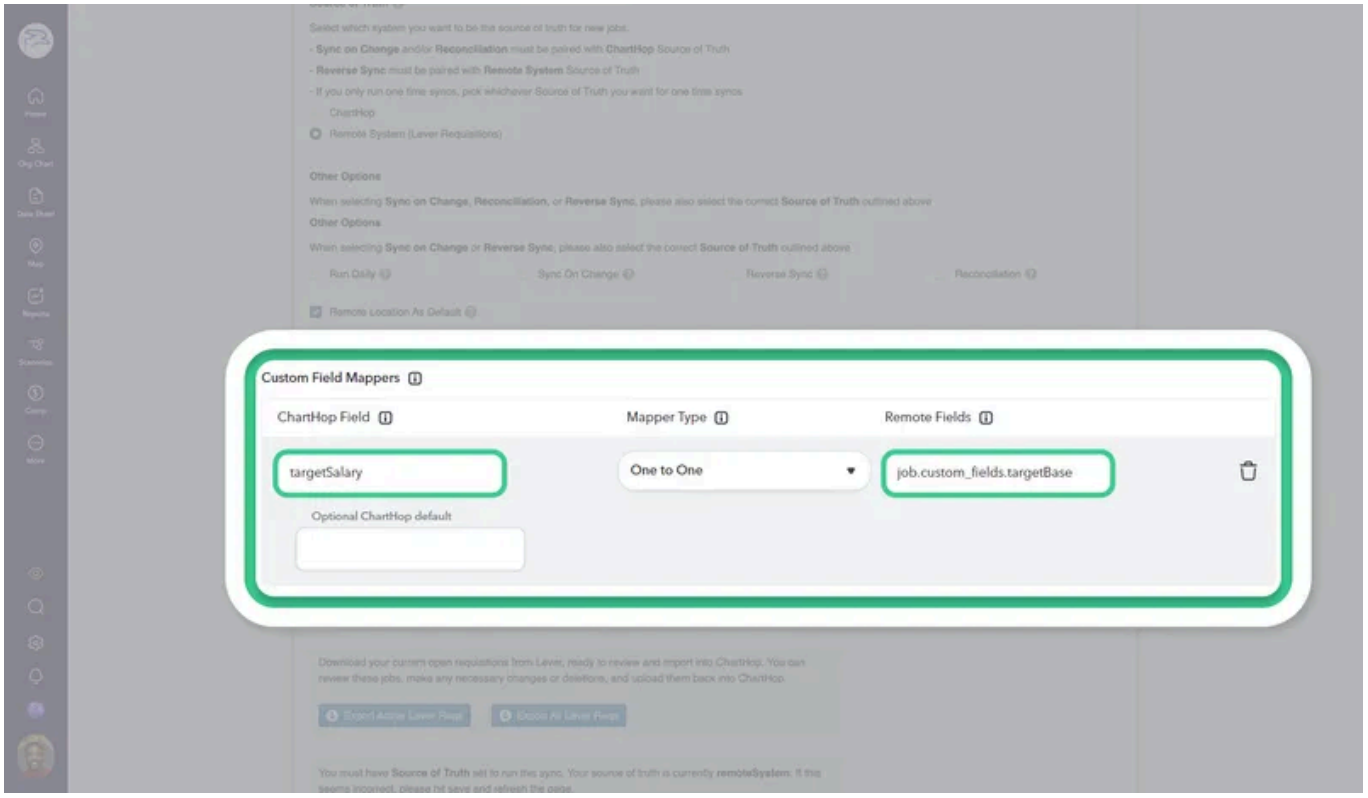
You can use custom field mappers to override the default field mappings.

To create a custom field mapper, follow these steps:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Jobvite** app.
5. Select the **Jobvite** app.
6. From the ChartHop **Jobvite** app settings page, scroll down and select the **Add Field Mapper** button.
7. Enter your Jobvite custom field **Code name** under **Remote Field**, appended with the correct endpoint.
    - To ensure that your Jobvite field parses correctly, your **Remote Fields** must be preceded by the correct endpoint (job., offer., etc.), and structured as follows:
        - The endpoint (such as job) + custom_fields. + your Jobvite Immutable Field.
        - For example, `job.custom_fields.targetBase`.
8. In the **ChartHop Field**, enter the field or Carrot expression you wish to map to the previously entered Jobvite custom field.

As an example, if you wanted to map a ChartHop custom field like *targetSalary* to the Jobvite custom field *targetBase*, then you'd want to set up your field mapper like in the image below:

You can map multiple ChartHop fields to a single Jobvite field.



The custom ChartHop Field: targetSalary is mapped to the custom Remote Field: targetBase.

Ensure you are using the correct name of the field(s) you want to map. Incorrect names will cause the mapping to fail.

Set new hire announce dates

When candidates are hired and they are created in ChartHop, you have a choice about when you want them to show up publically to your organization

Under the option **New Hire Webhook Announce Date** select one of the following:

- **Start date** - The new hire will not be org public until their start date.
- **Today** - The new hire will be displayed immediately on the day of the sync
- **Earlier of start date and today (Default)**

4.4.3.3.2.2. Adding Jobvite jobs

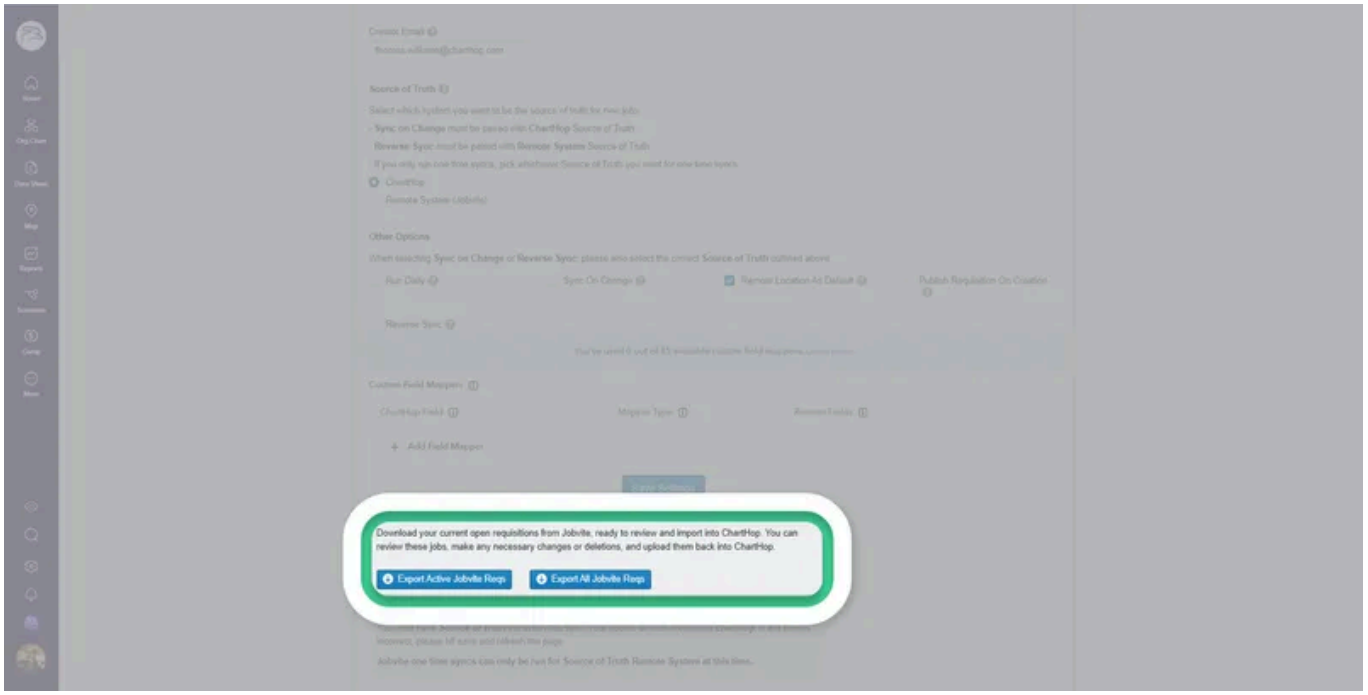
> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

When you configure ChartHop to be the source of truth (outbound data flow), you can choose to import any previously existing Jobvite jobs into ChartHop.

> Exporting Jobvite jobs are only for outbound data flows.

This is a two-step process. First, you'll use ChartHop's Jobvite application to export your existing jobs and then use ChartHop to import your exported jobs to ChartHop using a CSV file.

You can choose add all jobs, including those that are not active, or just import your active jobs from Jobvite.



Export all or active only Jobvite jobs.

Use the app to export existing Jobvite jobs to a CSV

To export Jobvite jobs follow these steps:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll the list down to the **Jobvite** app.
5. Select the **Jobvite** app.
6. From the ChartHop Job app settings page, select one of the following:
    - Use **Export All Jobvite Reqs** if you want to export all jobs including those that are **Open**, **Closed**, **On hold**, or **Filled**.
    - Use **Export Active Jobvite Reqs** if you want to export only **Open** jobs
7. Save the .csv file.

Verify your exported roles

Before you import Jobvite jobs into ChartHop, follow these steps:

1. Open your .csv file in Google Sheets or Excel.
2. Remove any roles that are not on your hiring plan, such as test jobs or otherwise closed roles.
3. Ensure that every role has a value for Manager. You should also set target comp (Base and Variable) for the roles if possible.
4. Ensure that the list of roles is correct and up to date, and reflects what you want imported into ChartHop as the new source of truth for your hiring plan

Import your Jobvite jobs to ChartHop

To import your saved CSV to ChartHop, save the edited file as a .csv or .xlsx and upload it on the **Import Spreadsheet** page in ChartHop.

Once the upload is complete, the hiring plan of open jobs in ChartHop should mirror the hiring plan of open reqs in Jobvite. From this point forward, you can use ChartHop as the system of record for open roles.

4.4.3.3.3. ChartHop as the source of truth

With an outbound job data flow, ChartHop is the source of truth and the database of record.

Hiring data is entered and updated in ChartHop, and is then sent from ChartHop to the ATS using event-based trigger flows which update the information in the ATS immediately.



Open reqs data flows Outbound, while new hires data flows inbound.

In an Outbound job data flow, open job and req data flow *outbound* from hiring plans in ChartHop to the ATS. This helps recruiting teams using ChartHop for headcount planning to move data seamlessly from the approved headcount plan into their recruiting system. However, once a hire is made in the ATS, that new hire data flows *inbound* from the ATS into ChartHop.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Then, once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of Outbound job data flows

Outbound job data flows offer several advantages over inbound job data flows including:

- The immediate and real-time syncing of information.
- Allowing headcount planning and execution (for example, hiring against the headcount plan) to all take place within ChartHop.

- Allowing hiring managers (or recruiters, or even other stakeholders such as finance) to collaboratively propose and make changes to open jobs automatically without needing to access the ATS.

Outbound job data flows are recommended if:

- You utilize ChartHop for headcount planning and/or being the source of truth for the hiring plan.
- You have simple to standard ATS workflows where ChartHop can fulfill most of the data needs.
- You are looking for real-time visualization across both systems.
- You need more collaboration when managing new jobs.

4.4.3.3.3.1. Using ChartHop to open jobs

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

When you configure your Jobvite app to have an outbound flow, ChartHop serves as the primary source of truth for open jobs. Depending on the status of a job in ChartHop, it translates to a specific status for the same job in Jobvite.

Outbound job status mappings

ChartHop job statuses map to Jobvite job statuses by default in the following ways:

ChartHop status	Direction	Jobvite status
Active	➡	Open
Passive	➡	On hold
Inactive	➡	On hold
Pending (via new hire webhook)	⬅	Filled
Offer	➡	Open
Closed	➡	Closed

> ChartHop supports custom field mappers if you've made any changes to the default Jobvite job statuses in your Jobvite instance or otherwise want to change the default field mappers. Please contact support for assistance.

Create a job

With the Jobvite app enabled, ChartHop's open jobs list becomes the system of record for open jobs. Recruiters, hiring managers, financial planners, and team leads can all look at ChartHop for a real-time view of which roles are open and how recruiting is going without needing access to Jobvite.

With the Jobvite app enabled, ChartHop's open jobs list becomes the system of record for open jobs. Recruiters, hiring managers, financial planners, and team leads can all look at ChartHop for a real-time view of which roles are open and how recruiting is going without needing access to Jobvite.

> To ensure that all proposed hiring changes are approved, we recommended that you create new jobs via scenarios as opposed to directly in Primary.

When an open job in ChartHop is set to **Active** recruiting status (either when someone creates or updates a new job), a req code is automatically created in Jobvite if not provided in ChartHop manually. The mapped Jobvite requisition is changed to **On Hold** in Jobvite if the open job is set back to an inactive status. Similarly, when the job is removed from ChartHop, it is deleted in Jobvite.

> If you create a new job in ChartHop with a recruiting status set to **Active** without a req code, a new req code is automatically generated by looking through the most recent req codes for that department, and incrementing the number (for example, from ENG-8 to ENG-9).


Setting a job as Active in ChartHop opens a new job in Jobvite.

Setting a job as Active in ChartHop opens a new job in Jobvite.

To create a new job in ChartHop, follow these steps:

1. From the left sidebar, select **Org Chart.**
2. In the **Org Chart**, create a new job by either:
    - Adding a direct report by selecting **Add a direct report** under a pre-existing person or role.
    - Creating a new job by selecting **New hire** under a pre-existing person or role.
3. In the **Create job** dialog enter your information for the new role using your custom fields and ChartHop's recommended fields beneath the following tabs:
    - **Structure** - General information about the role, including title, department, and location.
    - **Compensation** - Compensation information about the role, including salary and bonuses.
    - **Recruiting** - Recruiting information about the role, including hiring status and start date.
    - **Description** - A general description about the role.

> The ChartHop Job must include a Description in order to sync properly to Jobvite, as Jobvite requires a description in order to create a requisition. If desired, a placeholder value can be used for the ChartHop Job description, but it can not be left blank.

Once a candidate is hired in Jobvite, the job in ChartHop is set to **pending status**, and the hired candidate is announced in ChartHop, with their start date being the specified start date in the Jobvite offer.

Job hiring status

Any open roles with a **Recruiting status** set to **Active** in ChartHop flow from ChartHop to Jobvite. Mapped Jobvite requisitions are placed **On Hold** in Jobvite if the mapped ChartHop job is changed to an **Inactive** or **Passive** status in ChartHop. The mapped Jobvite requisition is deleted if the ChartHop job is removed.

ChartHop job status	Result in Jobvite
Active or Offer	A new **Open** Jobvite requisition is automatically created. If the ChartHop Job was already mapped to an existing Jobvite requisition, the Jobvite requisition is set to **Open.**
Inactive or Passive	The Jobvite requisition is set to **On Hold**.
Removed job	The Jobvite requisition is deleted.
Pending	The Jobvite requisition is set to **Closed.**We do not recommend changing the ChartHop job status to Pending manually. Rather, when a candidate is hired in Jobvite, the ChartHop Job status automatically changes to **Pending** to reflect the hire.

4.4.3.3.4. Jobvite as the source of truth

An inbound job data flow brings open jobs from the ATS to ChartHop where the ATS is the source of truth. Inbound data flows support both on-demand syncs and scheduled daily syncs. In most cases, you can rely on daily syncs to pull updated hiring data from your ATS.

Data remains in and is updated within the ATS system. A daily sync pulls information from the ATS to ChartHop. You can also stream data ad-hoc through an on-demand **Sync Jobs** button that can be accessed within the ATS application configuration page in ChartHop.



Open reqs and new hire data flow Inbound.

When a hire is made in the ATS, ChartHop creates a pending new hire which starts an open job according to its assigned start date. Once the pending new hire's information is also entered into the HRIS/payroll system, ChartHop will merge the payroll profile with the existing pending new hire using the pending new hire's personal or work email as a unique identifier.

Advantages of inbound job data flows

Inbound job data flows offer a few advantages over outbound job data flows which include:

- Recruiting teams only having to work out of the ATS.
- No changes are required to your standard hiring workflow.
- The process is often easier to start with and implement for first-time users.

Inbound job data flows are recommended if:

- You don't plan on using ChartHop as the source of truth for your hiring plan.

- You work with a team that is very comfortable with their current ATS workflow.
- You have specific data needs with your ATS that ChartHop can’t fulfill such as highly unique systems and data types.
- You do not plan to give recruiters access to ChartHop.

4.4.3.3.4.1. Using Jobvite to open jobs

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

When you configure your Jobvite app to have an inbound flow, Jobvite serves as the primary source of truth for open jobs. Depending on the status of a job in Jobvite, it translates to a specific status for the same job in ChartHop.

When you open a job in Jobvite, that job is also created and opened in ChartHop. As a result, any changes you make to open roles in ChartHop are not reflected in Jobvite.

Inbound job status mappings

Jobvite job statuses map to ChartHop's job statuses in the following ways:

Jobvite status	Direction	ChartHop status
Open	⬅	Active
On hold	⬅	Passive
On hold	⬅	Inactive
Filled	➡	Pending (via new hire webhook)
Open	⬅	Offer
Closed	⬅	Closed

4.4.3.3.5. Hiring candidates

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

Once you hire a candidate in Jobvite, a new hire is automatically created in ChartHop to fill the mapped job in Jobvite.

New hire triggers

Whenever you mark a job as **Filled** in Jobvite, a webhook is fired providing ChartHop with the necessary information to pull in the pending hire. **Learn more**.

> The webhook must be set up in Jobvite first. If you need help setting up the webhook, please contact your ChartHop implementation specialist.

Once the new hire is added to the HRIS system, the new hire information coming from the payroll system matches with and updates the pending new hire that is created in ChartHop from the new hire data flow.

Set new hire announce dates

When candidates are hired and they are created in ChartHop, you have a choice about when you want them to show up publically to your organization

Under the option **New Hire Webhook Announce Date** select one of the following:

- **Start date** - The new hire will not be org public until their start date.
- **Today** - The new hire will be displayed immediately on the day of the sync
- **Earlier of start date and today (Default)**

4.4.3.3.6. Troubleshooting and FAQ

Permissions

Which ChartHop roles are required for creating and viewing open jobs?

There are two access levels in ChartHop specifically designed for Recruiters:

1. **Recruiting Editor** - These users are allowed to view and make changes to open jobs, including target compensation levels and sensitive jobs. They are not allowed to make changes to, or access sensitive data about current employees, other than those they manage. This permission is generally intended for Recruiting roles or those managing the ATS.
2. **Recruiters** - These users are allowed to view sensitive information about open jobs only, including target compensation levels and viewing all sensitive jobs. They are not allowed to make changes to the primary timeline, or access sensitive information about current employees other than those they manage.

Other access levels with the ability to open roles:

- **Org Editor** - These users are allowed to view all information, and make official, permanent changes to the primary timeline. This access should be restricted tightly and limited to a few authorized individuals in HR, Finance, or similar roles.
- **Owner** - These users are allowed full access to everything, including the ability to change user permissions, configure integrations, and alter organization-wide settings. Because of the scope involved, this access should be tightly restricted.

Metrics

Where are metrics coming from?

ChartHop, once daily, pulls a list of candidates in Jobvite, and updates metrics based on the stages that the candidates are in.

Job Data

Why did the job fail?

In case a jobs fails to be properly created, you can check for the following:

1. Confirm that your API and Webhook credentials are correct.
2. Confirm that your Hiring Manager and Recruiter have accounts in both ChartHop and Jobvite with the same email address.
3. Confirm that Description was provided in Charthop
4. Ensure that your teams match between ChartHop and Jobvite.
5. Ensure that there are no teams with the same name across different departments in Jobvite. Please contact **support@charthop.com** should this occur.

Lastly, you can review any errors that occur during your sync in detail by checking your ATS app's sync history page. **Learn more**.

Why did a hiring fail?

In the case a hiring fails, you can check the following:

1. Confirm that an email has been provided for the candidate
2. Ensure that the Jobvite Req ID field is mapped to the correct job. You can contact **support@charthop.com** if you need assistance with this.
3. Be aware that we do not support internal transfers.

Data sync updates

When do updates for ChartHop to Jobvite job data flows push over?

Updates for ChartHop to Jobvite job data flows push over in the following cases:

- If a ChartHop Job has not already been mapped to a Jobvite requisition (e.g., no value in ChartHop's Jobvite ID field), the initial sync will occur when the ChartHop Job is turned to Active recruiting status in Primary.
- If a ChartHop Job has already been mapped to a Jobvite requisition (e.g., there IS a value in ChartHop Jobvite Req ID field), updates will sync over to Jobvite regardless of recruiting status (e.g., even if marked to Inactive, updates will sync over to Jobvite).

When do ChartHop jobs get created for Jobvite to ChartHop job data syncs?

ChartHop jobs are created for Jobvite to ChartHop job data syncs in the following cases:

- If a Jobvite requisition has not been mapped to a ChartHop Job, a new ChartHop Job will only be created if the Jobvite requisition is Open.
- If a Jobvite requisition has already been mapped to a ChartHop Job, updates will sync over to ChartHop regardless of status until the ChartHop Job is filled (after which no updates are synced).

How do I safely clean up roles that were accidentally duplicated during the sync?

To fix this, you will need to contact **support@charthop.com**.

ATS Setup

How should I support the setup for my ATS when there are different Departments or Teams between my ATS and payroll system?

The best practice is to leverage aliases. When aliases are present, if the Department or Team name doesn't work, ChartHop attempts with aliases, next.

For example, if the Team in Jobvite is Contractor but the Team in ChartHop is Contract, if there is an alias attached to the ChartHop Team called Contractor, we'll be able to sync into Jobvite's Contractor team.

Job status

Why was Recruit status changed to Pending?

Recruit status can change to Pending for one of three reasons:

1. Manually changing the status.
2. Receiving a new hire webhook (pending new hire) for the job.
3. Changing the Offer Accept Date will effective date Recruit status changing to Pending on the date selected for the offer acceptance date.

4.4.4. Equity syncs

The quickest way to add your employee equity data to ChartHop is to create a sync with your Equity system through a ChartHop equity app. This imports all your employees' stock options into your ChartHop org chart and keeps them up to date on a cadence of your choice: either on demand or once per week.

How data migrates between ChartHop and an equity system

ChartHop's equity apps sync *inbound* from the equity management system to ChartHop, so the equity provider remains the source of truth on equity data while ChartHop always contains your latest employee equity.



Equity apps sync equity data one-way from the equity system to ChartHop.

Since the sync is one-way, if you make changes to ChartHop data that originates from your equity system, those changes are overwritten on the next sync.

Data typically synced from your equity system includes:

- Grant Issue Date
- Grant Vest Date
- Grant Cancel Date
- Grant ID
- Grant Type
- Grant Shares
- Grant Price

- Grant Vesting Schedule

Supported grant types

ChartHop supports several grant types which are available from the **Planned Grant Type** field in the Job dialog when creating and modifying jobs.

Supported grant types:

- Incentive Stock Option (ISO)
- Non-qualified Stock Option (NSO)
- Restricted Stock (RSU)
- Stock Appreciation Rights (SAR)
- Performance Shares
- Phantom Stock

Grant vesting schedule support

ChartHop's equity apps can help you with special vesting schedules for stock grants. When you sync with ChartHop and provide the right kind of schedule, it can calculate how the grants will vest for your employees
over time. **Learn more**.

You can view vesting schedules for individual employees in your ChartHop organization by checking the **Equity tab** on the employee's profile page.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Technical owner | Owner

4.4.4.1. Carta

With the Carta integration app, you can sync your equity data to ChartHop, which automatically builds your org chart and keeps it up to date. Synced data includes employee stock grants.

Carta at a glance

The following table summarizes ChartHop's Carta app.

Supported	• Grow • Scale
Prerequisites	• A ChartHop account with the Owner role • Carta account with **Company Editor** access. ◦ Note: Although HR Administrators can install the app because they not have access to import 409A valuations the sync will not work. • **This guide from Carta** explains how to check a user's role.
API key permissions	To authorize the API connection you must have one of the prerequisite Carta roles above.
Data direction	Inbound from Carta to ChartHop
Sync cadence	Weekly or as needed
Effective dating support	Yes
Additional field mapping support	No
Equity app overview	Read an **overview** of how equity apps work in ChartHop
Synced Carta data	The default **synced data** from Carta to ChartHop.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

4.4.4.1.1. Synced data from Carta

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

The following table lists the default data set synced from Carta to ChartHop.

ChartHop field label	ChartHop field code	Carta field code
Name	name	stakeholder.fullName
Planned grant	grant	optiongrant.id
Date	date	optiongrant.issueDate
Grant Cancel Date (optional)	grantCancelDate	optiongrant.canceledDate
Grant Vest	grantVest	optiongrant.grantVest
Grant Vest Date	grantVestDate	optiongrant.vestingStartDate
Planned grant (type)	grantType	optiongrant.stockOptionType
Planned grant (shares)	grantShares	optiongrant.quantity
Grant Price	grantPrice	optiongrant.exercisePrice

4.4.4.1.2. Installing the Carta app

This section covers setting up the Carta integration app, which allows you to sync your employee stock grants to ChartHop.

Review your equity system data

ChartHop recommends reviewing the data in your equity system to ensure it is what you expect before you sync it to ChartHop.

Before installing this app, ensure that the employee email addresses in Carta match those in ChartHop. User matching is based on the employee's email address (work email or home email) or employee name. If a user exists in Carta but not in ChartHop, that user is ignored during sync.

Install the Carta app

After you have reviewed your equity system data, you can install the Carta integration app in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.
4. Scroll to your equity app and select **Install** on the far right of the respective app's row.

Connect the Carta app

When you select **Install**, you are prompted to authorize a connection between ChartHop and Carta. To do this, select **Go to Carta API**.

If not already, log in to Carta using your credentials. Carta shows you some details about the data ChartHop will be accessing. Select the issuer account in Carta to connect to ChartHop, then select **Authorize**.

Your Carta account must have either a **Company Viewer, Company Editor, or HR Admin role** role. **This guide from Carta** explains how to check a user's role.

> You can only connect one Carta issuer account to a ChartHop organization account.

You should be redirected back to ChartHop when the authorization is complete.

Configure data sync settings for Carta

Data sync settings control when data is synced between ChartHop and Carta. By default, data can be synced on a weekly basis. Otherwise, you can save your settings and configure the sync to occur at another time.

- Select one of the two options:
  - **Enable auto sync** - This option syncs your organizational roster from Carta's API weekly.
  - **Save settings** - This option skips the sync setup for now and saves your settings up to this point so that you can set up your sync details later.
- Select **Finish setup** when you're done.

Run an initial one-time sync of your equity data

After you first configure your equity data for Carta, you should run a one-time sync for **All Grants** to populate your grant data and verify that the sync is operating as you expect.

To run a one-time sync for all grants:

1. Under Carta's **Manage app** settings page, select the **Run one-time sync** button.
2. You'll be given three options to sync:
   - Sync Recent Grants
   - Sync All Grants
   - Sync Valuations Only
3. Select **Sync All Grants**.

Configure your equity app sync to run weekly

After you've synced your data for the first time and verified your vesting schedules, you should configure a weekly sync. The value of syncing your equity data to ChartHop is that it ensures that your equity grant data is always up to date.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll to your equity app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync settings** section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

Set up valuations

To show the dollar values of grants in ChartHop, you will need to first enter the valuation for your shares. ChartHop only pulls 409A valuations from Carta. Note that the authenticated users must have a Carta account with **Full Access or Company Editor** access roles. See **this guide to set up stock valuations**.

4.4.4.2. Etrade

This app syncs your equity data between ChartHop and E*Trade. The following information is synced daily:

- Employee stock grants

You need to work with a ChartHop implementation specialist to install this app.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

4.4.5. FP&A

ChartHop's Financial Planning and Analysis (FP&A) apps leverage its employee, headcount, and scenario data to provide financial teams with the means to conduct cost planning, budgeting, and reporting through a single source of truth for all people data.

ChartHop supports Workday Adaptive Planning.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles**: Technical owner | Owner

4.4.5.1. Workday Adaptive Planning

The Workday Adaptive Planning app runs outbound from ChartHop to Workday Adaptive Planning so you can use your ChartHop data in Workday Adaptive Planning to run financial models and perform analysis. You can sync data daily, hourly, weekly, monthly, or as needed.

Effective dating is not supported, meaning that data cannot be stored with an individual date (for example, a promotion date).

Customized field mapping is supported, so you can make any data point in your ChartHop organization available in Workday Adaptive Planning. Please direct field mapping questions or requests to ChartHop Professional Services or Support.

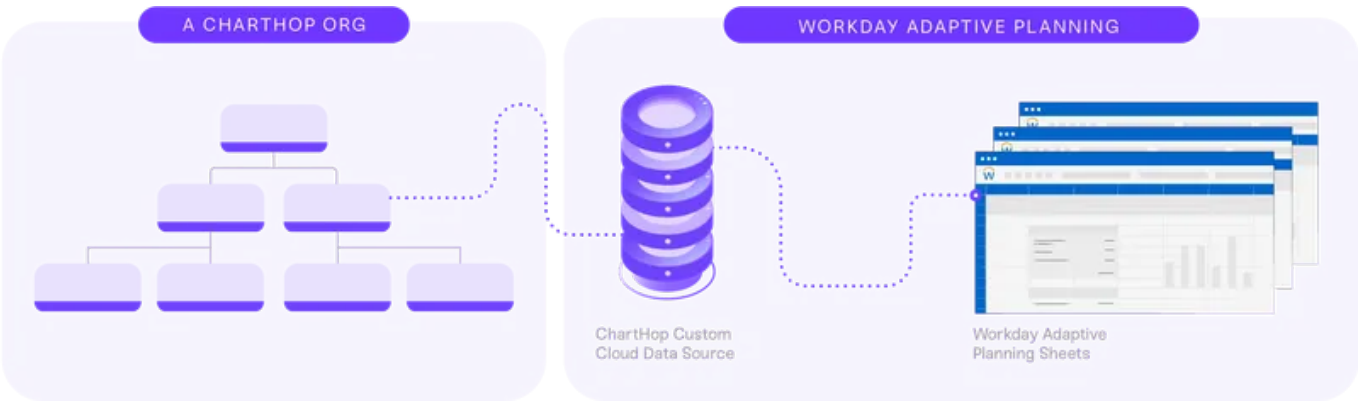
How it works

The Workday Adaptive Planning app syncs your ChartHop data to a *Custom Cloud Data Source* in Workday Adaptive Planning. The Custom Cloud Data Source always has access to the most recent data from ChartHop.

After you install the Workday Adaptive Planning app in ChartHop, you'll set up *Loaders* in Workday Adaptive Planning, which will pipe data from your ChartHop Custom Cloud Data Source to your Workday Adaptive Planning *Sheets.*

You can configure Loaders to run on a schedule or as needed. ChartHop recommends that you configure Loaders to run daily, so your Sheets—and the financial models that run on them—always have the latest ChartHop data.

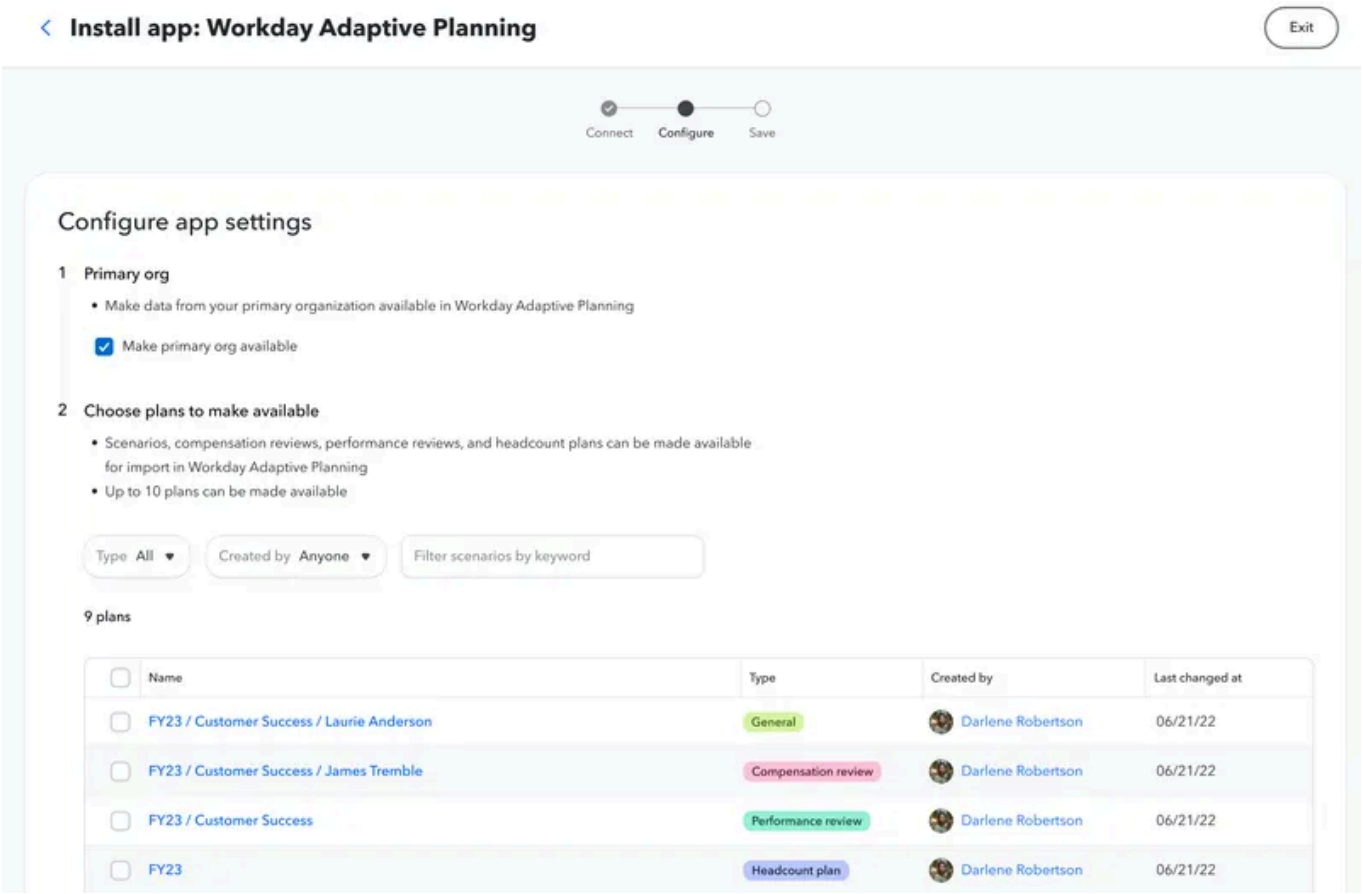
The following diagram shows how ChartHop integrates with Workday Adaptive Planning.



Install the Workday Adaptive Planning app

You install the Workday Adaptive Planning app in ChartHop with an install wizard. You'll also need to complete some steps in Workday Adaptive Planning (including setting up a Custom Cloud Data Source and importing the ChartHop data structure). ChartHop's in-app wizard provides full instructions.

> To install the Workday Adaptive Planning app, you'll need to be comfortable configuring external data sources in your Adaptive instance or have access to a resource who can perform this task. For detailed information, view the **Workday Adaptive Planning documentation** (Workday login required).



To install the Workday Adaptive Planning app in ChartHop:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Under **Available apps**, locate Workday Adaptive Planning and select **Install**.
4. Select the **Install** button on the page that displays.
5. Complete the steps in the **Connect to Workday Adaptive Planning** section.

6. Select **Next Step**.
7. In the **Configure app settings** page, select whether to make data from your primary org available in Workday Adaptive Planning.
8. (Optional) Choose the ChartHop plans you want to make available for import in Workday Adaptive Planning.
    - You have the option to include scenarios, compensation reviews, performance reviews, and headcount plans.
    - You can include up to 10 plans.
    - ChartHop lets you filter by plan type and by the user who created the plan.
    - You have the ability to edit the plans that are included after you've finished installation.
9. Select the **Advanced settings** link and select the employee types to make available.
    - ChartHop recommends accepting the defaults for **Advanced settings**, which makes all employee types available in your synced data.
10. Select **Next Step**.
11. Select **Save**.

Customize field mapping

After you install the Workday Adaptive Planning app, additional ChartHop fields can be mapped to your Workday Adaptive Planning Sheets using any column names you prefer. Please direct field mapping questions or requests to ChartHop Professional Services or Support.

To map additional fields:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Next to Workday Adaptive Planning, select Configure (gear icon).
5. Select the **Field mappers** tab.
6. Select **Add field mapping** and then select **Add Field Mapper**.
7. Under **ChartHop Field**, enter the ChartHop field to map while leaving **Optional Charthop Default** blank.

8. Under **Mapper Type**, select **One to One**.
9. Under **Remote Fields**, enter the name of the field as you want it to appear in your Sheets, preceded by `job`.
   For example, you could map `ChartHopField` to `job.MyChartHopField`. `MyChartHopField` would be the column name in your Workday Adaptive Planning Sheets.
10. Click **Save field mappers** to finish configuring custom fields.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

4.4.6. Identity & SSO

You can use ChartHop as your source-of-truth to leverage your employee data for tasks such as creating SSO profiles or workspaces.

> **Modules: HRIS** | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

> **Roles**: Technical owner | Owner

4.4.6.1. Google Workspace

The Google Workspace app automatically updates Google Workspace profiles with ChartHop source data. You can configure both Google Workspace profile fields and group memberships. Optionally, you can set the app to create Google Workspace profiles when people are hired into ChartHop.

When you install Google Workspace, you'll need to make decisions about how you want to handle Google Workspace profile and what fields you want to include in your sync.

Field	Description
Google Workspace profiles	• Automatically create new Google Workspace profiles from ChartHop on sync • Don’t create new profiles only update existing Google Workspace profiles on sync
Sync new hires before start date	The number of days before a start date to begin syncing new hires

Install the Google Workspace app

To install the **Google Workspace** app, follow the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.
4. Locate and select the **Google Workspace** app in the list of available apps.
5. Select **Install**.
6. Follow the steps outlined in the setup wizard to connect the **Google Workspace** app to ChartHop.

> To connect Google Workspace to ChartHop, you must be an *Google Workspace administrator*.

Run a single, on-demand sync to Google Workspace

Any ChartHop user with sufficient permissions can trigger an on-demand sync to Google Workspace at any time. To sync your data for the first time, or subsequently, on-demand at any time, follow the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Google Workspace** app in the list of installed apps.
5. At the top of the page, select **Run one-time sync**.
6. Select **Run sync** to perform the sync.

Export dry runs

Any ChartHop user with sufficient permissions can trigger a test integration between Google Workspace and ChartHop at any time.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Google Workspace** app in the list of available apps.
5. At the top of the page, select **Run one-time sync**.
6. Select **Export dry run** to test the integration.
7. When the integration is complete, select **Download** to receive the test results file.

Create sync groups (mailing lists)

You can create and populate Google Workspace sync groups (mailing lists) from the app config page by following the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Google Workspace** app in the list of available apps.

5. Under the **Advanced Settings** section, select **Edit**.
6. Under the **Sync Groups (Mailing Lists)** section, select **+ Add group.**
7. Enter a name for the group in the **Group Name** field.
8. Enter a corresponding Carrot query in the **Include People Matching** field, or use the filter controls to the left.
9. Select **test** to confirm your query. It should open the Data Sheet in a new tab with your query applied.
10. Select **Save** at the bottom of the page.

Create sync profile fields

For each custom **Google Workspace** profile field, you may define a ChartHop field or expression to be synced. To do this, follow the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Google Workspace** app in the list of available apps.
5. Under the **Advanced Settings** section, select **Edit**.
6. Under the **Sync Profile Fields** section, select + **Add field**.
7. Enter the name of a custom **Google Workspace** profile field that you wish to populate with data.
8. Enter the corresponding query or field that you wish to copy from ChartHop.
9. Select **Save** at the bottom of the page.

> **Modules: HRIS** | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

4.4.6.2. Okta

The **Okta** app automatically updates your Okta profiles with ChartHop source data. You can configure both Okta profile fields and group memberships. Optionally, you can set the app to create Okta profiles when people are added to ChartHop.

When you install Okta, you'll need to make decisions about how you want to handle Okta profiles, whether you set a default location, and what fields you want to include in your sync.

Field	Description
Okta profiles	• Automatically create new Okta profiles from ChartHop on sync • Don’t create new profiles only update existing Okta profiles on sync
Sync new hires before start date	The number of days before a start date to begin syncing new hires

Obtain Okta API credentials

You will need to obtain API access from Okta before you can install the app. To obtain an Okta API key, follow the steps outlined in their help document **here**.

> - To connect Okta to ChartHop, you must be an *Okta administrator*.
> - Once you've received the API token from Okta, do not share this information with anyone outside of your organization.

Install the Okta app

To install the **Okta** app, follow the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.

4. Locate and select the **Okta** app.
5. Select **Install**.
6. Follow the steps outlined in the setup wizard to connect the Okta app to ChartHop.

Configure Lifecycle & Provisioning Settings

Once the app is installed, you must configure how ChartHop handles new hires, re-hires, and departures. These settings determine when an Okta profile is created and when access is revoked.

Basic Settings

Access these by selecting **Edit** under the **Basic Settings** section of the Okta app.

Setting	Description
Create Okta profiles for new hires	When enabled, ChartHop automatically creates an Okta record for any new person added to the platform.
Re-activate Okta profiles for re-hires	When enabled, ChartHop identifies returning employees and re-activates their existing (inactive) Okta profile rather than creating a duplicate.
De-activate Okta profiles on departures	Automates the de-activation of Okta accounts based on the termination date in ChartHop.
De-activate same-day voluntary departures	If checked, you can set a specific **deactivation Time** (e.g., 11:00 PM). This allows voluntary leavers to maintain access until the end of their final day.
Send email and activate upon creation	Determines if the account is immediately activated or remains in a "staged" state. *Note: Test this to ensure it aligns with your onboarding workflow.*

Automated De-activation Logic

ChartHop performs a daily sync to manage departures based on the following rules:

- **Past Departures:** Any employee terminated **yesterday** (voluntary or involuntary) who remains active in Okta will be deactivated during the morning sync.
- **Involuntary Departures:** If event-based sync is active, these users are typically deactivated immediately upon the termination being entered.
- **Voluntary Departures:** These users are deactivated once per day at the designated cutoff time (e.g., 11:00 PM ET) to ensure they have access for their full final shift.

Run a single, on-demand sync to Okta

Any ChartHop user with sufficient permissions can trigger an on-demand sync to Okta at any time. To sync your data for the first time, or subsequently, on-demand at any time, follow the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Okta** app in the list of installed apps.
5. At the top of the page, select **Run one-time sync**.
6. Select **Run sync** to perform the sync.

Export dry runs

Any ChartHop user with sufficient permissions can trigger a test integration between Okta and ChartHop at any time.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Okta** app in the list of available apps.
5. At the top of the page, select **Run one-time sync**.
6. Select **Export dry run** to test the integration.
7. When the integration is complete, select **Download** to recieve the test results file.

Create sync groups

You can create and populate Okta groups from the app config page by following the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Okta** app in the list of available apps.
5. Under the **Advanced Settings** section, select **Edit**.
6. Under the **Sync Groups** section, select **+ Add group.**
7. Enter a name for the group in the **Group Name** field.
8. Enter a corresponding Carrot query in the **Include People Matching** field, or use the filter controls to the left.
9. Select **test** to confirm your query. It should open the Data Sheet in a new tab with your query applied.
10. Select **Save** at the bottom of the page.

Create sync profile fields

For each custom Okta profile field, you may define a ChartHop field or expression to be synced. To do this, follow the steps below.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Locate and select the **Okta** app in the list of available apps.
5. Under the **Advanced Settings** section, select **Edit**.
6. Under the **Sync Profile Fields** section, select + **Add field**.
7. Enter the name of a custom Okta profile field that you wish to populate with data.
8. Enter the corresponding query or field that you wish to copy from ChartHop.
9. Select **Save** at the bottom of the page

Common Expression Examples

Use these common expressions to map ChartHop data to Okta fields:

Okta Field Name	ChartHop Expression	Description
managerEmail	manager.email	Pulls the primary email of the employee's direct manager.
deptCode	department.code	Syncs the short-hand code for the department (e.g., "ENG" instead of "Engineering").
costCenter	custom.cost_center	Pulls a custom field value defined in your ChartHop instance.
isManager	is_manager	A boolean (true/false) based on whether the person has direct reports.

Supported Attributes

The following SAML attributes are supported:

Attribute name	Name format	Value
org	unspecified	`{org-slug-from-ChartHop}`
email	unspecified	`user.email`
first_name	unspecified	`user.firstName`
last_name	unspecified	`user.lastName`

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

4.4.7. Slack

The Slack app integrates your Slack instance with ChartHop. It syncs Slack profile information to ChartHop employee profiles and allows you to send messages from ChartHop to Slack channels.

If you've installed the Slack integration app, you can also define actions such as birthday and work anniversary announcements to be sent to a Slack channel. See **Birthday announcements** or **Work anniversary announcements**.

The Slack app integrates your Slack instance with ChartHop. It syncs Slack profile information to ChartHop employee profiles and allows you to send messages from ChartHop to Slack channels.

User matching is based on the employee's email address (if it matches their Slack email) or name. If a user exists in Slack but not in ChartHop, that user is ignored during sync.

You need to be a Slack administrator to install. If you don't have appropriate permissions, grant ChartHop Technical Owner access to a member of your IT staff who does have Slack administrator permissions.

> Although our Slack integration app is already in use for many ChartHop customers, we are still going through the app approval process with Slack.

Syncing Slack profile data to ChartHop

When you use the Slack app, the following fields from Slack are added to ChartHop employee profiles. However, the Slack photo is not synced if an employee already has an employee photo in ChartHop. If there is no user-uploaded picture in Slack, no image is synced.

- Photo
- Time zone
- Slack ID

> Contact ChartHop implementation services if you are interested in mapping additional data from Slack.

Accessing Slack from ChartHop

Messaging from ChartHop to Slack is supported in two ways:

- Employees can access Slack through the Slack logo on an employee's profile. Employees who select the icon are redirected to Slack DM with the associated user.
- Administrators can set up messaging to Slack based on ChartHop Actions, such as when an employee submits a form or reminders.

Install the Slack app

You must have either the Owner or Technical Owner role to install the Slack app. In addition, you also need to be a Slack administrator with the appropriate permissions to allow Slack integrations.

To install the Slack app:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Availible Apps** tab.
4. Find the Slack app in the list of available apps.
5. Select **Install** on the far right.
6. Select the **Go to Slack** button.
    1. Sign in to Slack.
    2. Select **Allow** to permit ChartHop to connect to Slack.
7. Select **Next.**
8. On the last page of the wizard, select **Save settings**.
9. Select **Save.**

Run an initial one-time sync of your Slack data

Before configuring your Slack app to sync regularly, you should run an initial sync to verify that the Slack data is syncing correctly to ChartHop.

To run a one-time sync:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll to the Slack app and select the gear (settings) icon on the far right of the row to view app settings.
5. Select **Run one-time sync** in the upper right corner.

Verify your Slack data in ChartHop

After running your first sync, you can use the Data Sheet to look for employees whose information did not sync from Slack. You can view the Sync History page to verify when the sync was run and if it encountered any issues.

> Remember that most issues with your synced data originate in your Slack system. ChartHop allows you to visualize your employee data to make finding these discrepancies easier. For example, if a user's email in Slack does not match their user email in ChartHop, that user's information will not sync. If this happens, update the user's email address in Slack and try the sync again.

1. On the **Data Sheet** page, choose **Select Columns**.
2. In the **Select Columns** dialog, type Slack to find the Slack ID field.
3. Mark the checkbox next to the field to display the column on the Data Sheet.
4. Select **Apply** to save your changes.
5. In the Filter text box, enter the following filter: **!contact.slack:*** which finds any user who does not have a Slack ID.
6. Review the Data Sheet for any users without IDs. Remember that open roles do not have Slack IDs.

Configure your Slack app sync to run daily

After you've synced your data for the first time and verified your employee profiles, you should configure a daily sync. The value of syncing your Slack data to ChartHop is that it ensures that your employee data is always up to date. For example, if an employee's time zone is changed, that info is updated in ChartHop.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll to the Slack app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **App status & sync** settings section, select the **Edit** (pencil) icon.
6. Toggle the auto-sync option to on.
7. Select **Save**.

Set up email notifications

You can configure the Slack app to email specific users the list of changes made by each data sync from your Slack app. Alternatively, you can view these changes on the Sync history page.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Apps**.
3. Select the **Installed Apps** tab.
4. Scroll to the Slack app and select the gear (settings) icon on the far right of the row to view app settings.
5. Within the **Email notifications** section, select the **Edit** (pencil) icon.
6. Select Add users to be prompted to enter a ChartHop user or users to email.
7. Select **Save**.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Technical owner | Owner

4.4.7.1. Troubleshooting Slack announcements

You can send notifications to Slack users according to Actions you set. For example, you can send reminders to fill out surveys or 1:1 forms, as well as work anniversary announcements.

Users can also send Slack messages to each other directly through a respective employee's profile.

If a Slack message doesn't reach the user as expected, it could be because the person's profile in Slack isn't connected to their profile in ChartHop.

Verify an employee's Slack ID in ChartHop

To see whose accounts are or are not connected, verify that the person has a Slack ID in ChartHop:

1. From the left sidebar, select **Data Sheet.**
2. On the **Data Sheet** page, choose **Select Columns**.
3. In the **Select Columns** dialog, type Slack in the search bar.
4. Select the check box for the **Slack ID** field to display this column in the Data Sheet.
5. View which employees do not have a Slack ID or use the Filter (`!contact.slack`) to filter to only people without a Slack ID.

Troubleshoot Slack IDs

If you don't see a Slack ID for an employee, there are several things you can do to troubleshoot:

- Verify that the person's email in Slack is exactly the same as it is in ChartHop
- Verify that the person's name in Slack is exactly the same as it is in ChartHop
- Re-sync Slack with ChartHop by clicking "Run one-time sync" on the Slack app Page

If all of this information aligns and you are still experiencing issues, we recommend you uninstall and reinstall the Slack app to ensure that ChartHop's permissions are up to date.

4.5. Bundles

ChartHop has one-click install bundles that contain additional built-in fields, forms, and custom profile tabs that integrate directly into your reporting and employee profiles.

Included bundles include employee surveys about returning to the office, additional dashboard reports, as well as assessment forms for determining emergency and permanent successors. ChartHop continually adds additional bundles for you to choose from.

You can preview the bundle to see a list of the fields it includes and get an idea of where the form will appear in ChartHop.

You must have the owner role in order to install bundles.

Preview a bundle

You can preview any of the included ChartHop bundles.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Availible Bundles** tab.
4. Within the Available bundles section, select Install to see an overview of your selected bundle. Within the Bundle page, you can expand each category to examine the content of the bundle. You can view fields, reports, or forms, depending on what is included in the particular bundle.

Install a bundle

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Availible Bundles** tab.
4. Within the Available bundles section, select **Install** to see an overview of your selected bundle.
5. Within the Bundle page, select **Install** to install the bundle.

Uninstall a bundle

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Installed Bundles** tab.
4. Find the budle that you would like to unstill and select it.
5. Within the Bundle page, select **Uninstall** to uninstall the bundle.
6. In the uninstall dialog, select which items from the bundle you would like to uninstall.
7. *For example, you may want to remove the Dashboard but not the fields.*

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Technical owner | Owner

4.5.1. Birthday announcements

You can install the Birthday announcements bundle to have birthday announcements automatically sent to the email address or Slack channel you configure.

Birthday and anniversary announcements are automatically included on the ChartHop home page.

> To enable sending announcements to Slack, you must install the Slack app. **Learn more.**
>
> ChartHop Basic customers can enable/disable birthday and anniversary announcements but cannot edit their configuration. **Learn more.**

Install the Birthday announcements bundle

Bundles are packages of additional features with pre-made forms, additional fields, and ChartHop notifications (depending on the bundle).

To install the Birthday announcements bundle:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Availible Bundles** tab.
4. Scroll to the **Birthday announcements** bundle.
5. Select **Install** on the far right-hand side of the table.

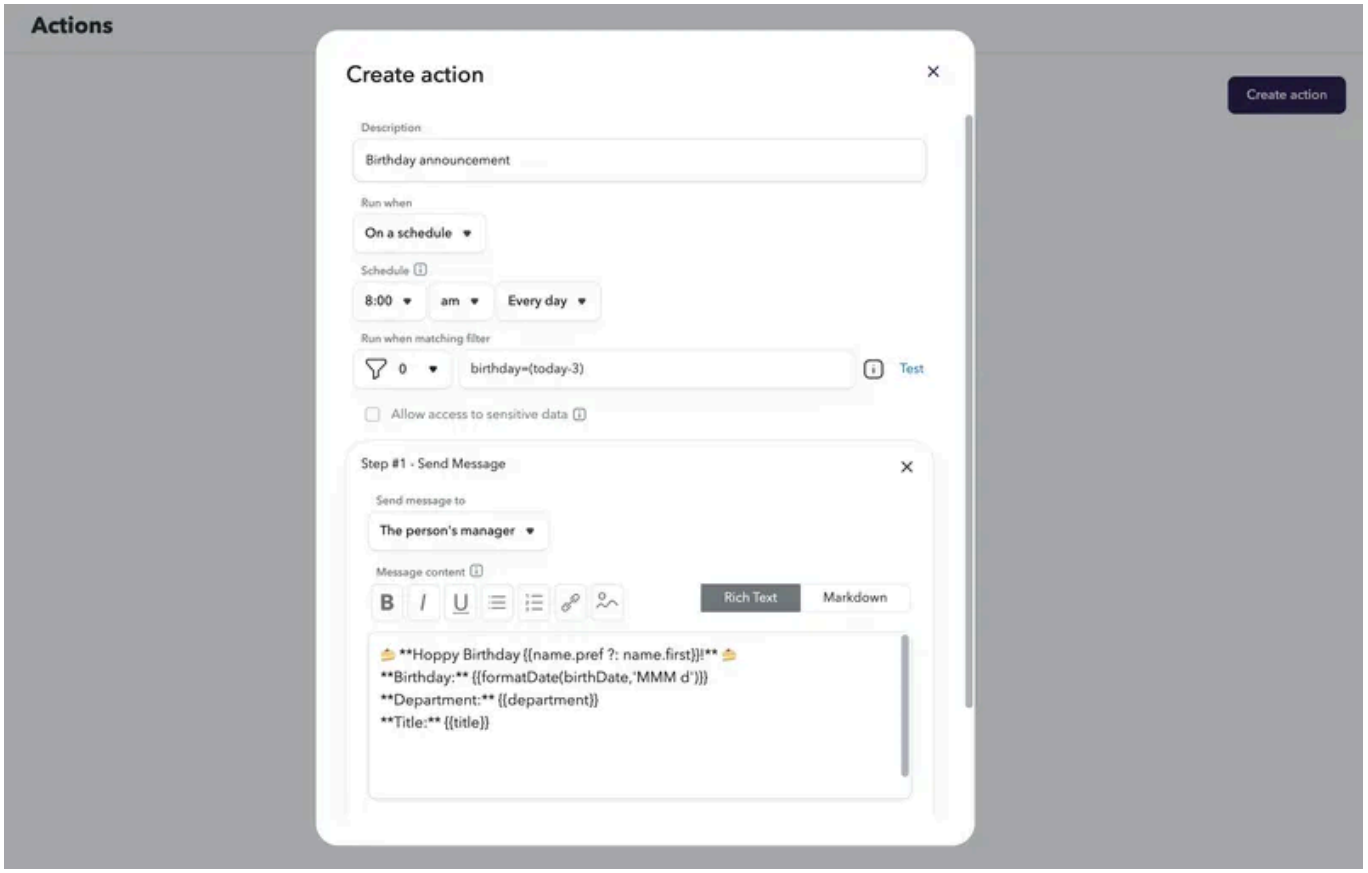
Configure Birthday announcements

You can set up birthday announcements by configuring the ChartHop action installed when you installed the Birthday announcements bundle.

You can customize when the announcement is sent and which Slack channel to use when sending announcements. You can also choose to send the announcement to a specific email or DM the person or person's manager with the birthday announcement.

For example, you can configure the app to send an email to a person's manager three days before their birthday by creating a custom filter (`birthday=today-3`) and selecting **Person's manager** in the **Send message to** dropdown list.

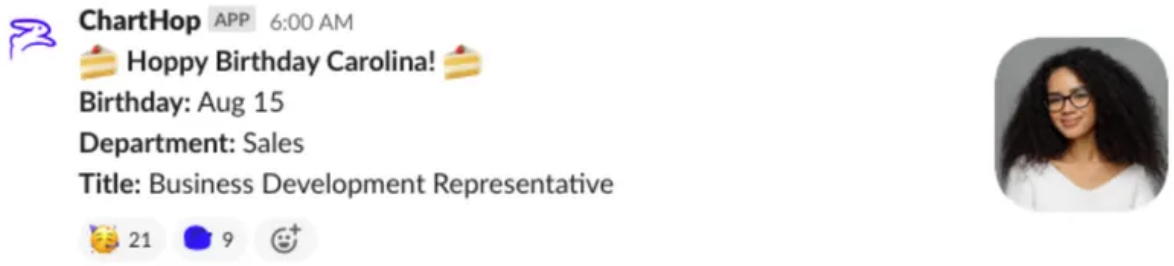
You can use ChartHop's Carrot language in custom filters. **Learn more.**



Separate announcements are sent for each employee's birthday according to the parameters you set..

To configure birthday announcements:

1. From the left sidebar, select **People Ops Tools**.
2. From the sub-menu, select **Automated actions**.
3. Select **Edit** from the row menu (⋮) on the left side of the Birthday announcements row.
4. In the **Edit** dialog, use the **Text** field to customize the information included in the announcement.
    - Below is an example of how the default announcement displays in Slack:



5. Choose from the following options to customize how you want the announcements sent:
    - To use Slack, select **Chat Channel** and then enter the name of the Slack channel where you want to send the announcements. Be sure that the channel name starts with #. By default, it is set to send to the #general channel
    - To send to a particular email address, select **Email address** and enter the email address where you want to send the announcement.
    - To send to the person, select **Person**. The announcement is sent in a direct Slack message to the employee. If they are not connected to Slack, it sends an email.
    - To send to the person's manager, select **Person's manager**. The announcement is sent in a direct Slack message to the person's manager. If they are not connected to Slack, it sends an email.
6. Select **Save**.

Testing Birthday announcements

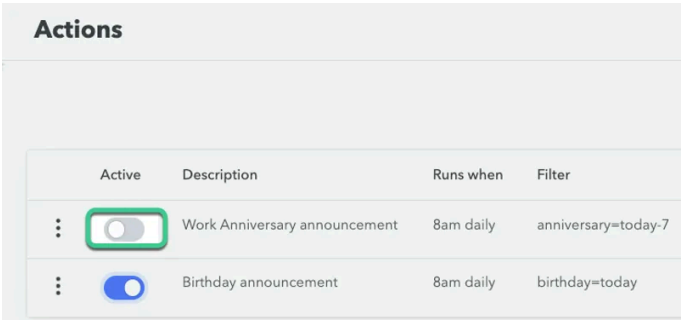
You can test how your birthday announcements look and where they are sent.

1. From the left sidebar, select **People Ops Tools**.
2. From the sub-menu, select **Automated Actions**.
3. Find the action for the Birthday announcements action.
4. Select Run... from the row menu (⋮) on the left side of the Birthday announcements row.
5. In the Run action dialog, select a person to send an announcement to. This person can verify if they receive the announcement as expected.
6. Select **Run**. The announcement is sent immediately to the person you selected.

Disable announcements

You can disable announcements at any time.

1. From the left sidebar, select **People Ops Tools**.
2. From the sub-menu, select **Automated Actions**.
3. Move the slider in the **Active** column to the grayed out position.



Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Technical owner | Owner

4.5.2. Work Anniversary announcements

You can install the Work Anniversary announcements bundle to have anniversary announcements automatically sent to the email address or Slack channel you configure.

Birthday and work anniversary announcements are included on the ChartHop home page automatically.

> To enable sending announcements to Slack, you must install the Slack app. **Learn more.**
>
> ChartHop Basic customers can enable/disable birthday and anniversary announcements but cannot edit their configuration. **Learn more.**

Install the Work Anniversary announcements bundle

Bundles are packages of additional features with pre-made forms, additional fields, and ChartHop notifications (depending on the bundle).

To install the Work Anniversary announcements bundle:

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Availible Bundles** tab.
4. Scroll to the **Work Anniversary announcements** bundle.
5. Click **Install** on the far right-hand side of the table.

Configure Work Anniversary announcements

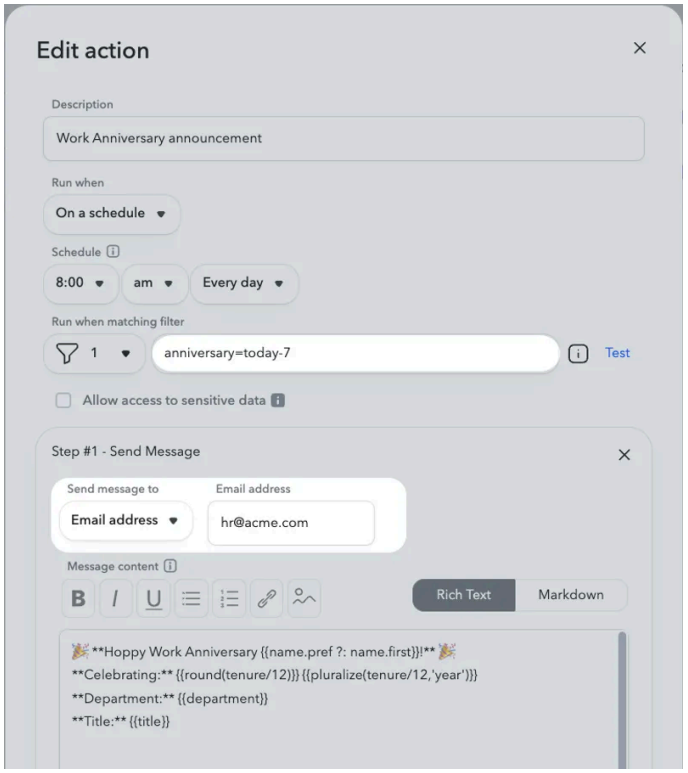
You can set up Work anniversary announcements by configuring the ChartHop action installed when you installed the Work Anniversary announcements bundle.

You can customize when the announcement is sent, as well as which Slack channel to use when sending announcements. You can also choose to send the announcement to a

specific email or DM the person or person's manager with the work anniversary announcement.

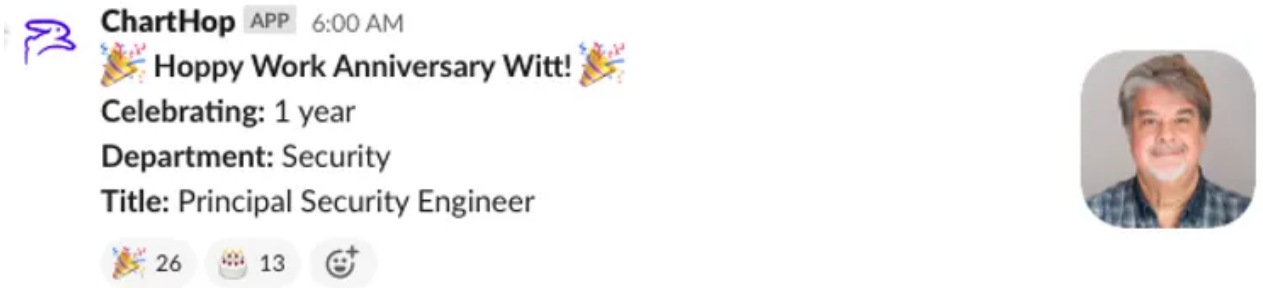
For example, you can set up an email to be sent to the HR team's email alias one week (`anniversary=today-7`) before the employee's anniversary.

You can use ChartHop's Carrot language in custom filters. **Learn more.**



Separate announcements are sent for each employee's work anniversary according to the parameters you set.

You can edit the default template. Here's how the default template looks in Slack:



To configure anniversary announcements:

1. From the left sidebar, select **People Ops Tools**.
2. From the sub-menu, select **Automated Actions**.

3. Select Edit from the row menu (⋮) on the left side of the Work Anniversary announcements row.
4. In the Edit dialog, use the **Text** field to customize the information included in the announcement.
5. Choose from the following options to customize how you want the announcements sent:
    - To use Slack, select **Chat Channel** and then enter the name of the Slack channel where you want to send the announcements. Be sure that the channel name starts with #. By default, it is set to send to the #general channel
    - To send to a particular email address, select **Email address** and enter the email address where you want to send the announcement.
    - To send to the person, select **Person**. The announcement is sent in a direct Slack message to the employee. If they are not connected to Slack, it sends an email.
    - To send to the person's manager, select **Person's manager**. The announcement is sent in a direct Slack message to the person's manager. If they are not connected to Slack, it sends an email.
6. Select **Save**.

Testing anniversary announcements

You can test how your anniversary announcements look and where they are sent.

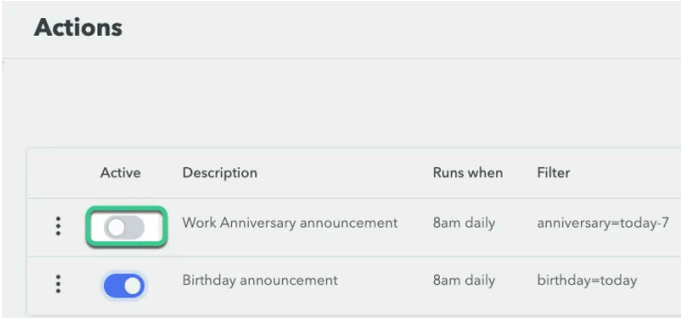
1. From the left sidebar, select **People Ops Tools**.
2. From the sub-menu, select **Automated Actions**.
3. Select Run... from the row menu (⋮) on the left side of the Birthday announcements row.
4. In the Run action dialog, select a person to send an announcement to. This person can verify if they receive the announcement as expected.
5. Select **Run**. The announcement is sent immediately to the person you selected.

Disabling announcements

You can disable announcements at any time.

1. From the left sidebar, select **People Ops Tools**.

2. From the sub-menu, select **Automated Actions**.
3. Move the slider in the **Active** column to the grayed out position.



Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Technical owner | Owner

4.5.3. Nine box ratings

Nine box ratings allow managers to give employees ratings that are used to create nine box groups for employees automatically. Managers can only enter and view ratings and generate nine box groups for employees that report to them. Depending on their access level, other ChartHop users, such as HR leaders, have access to this information.

Assign a nine box rating to an employee

Managers can assign nine box ratings to their employees from the respective employee's profile page.

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, double-click the employee whose profile page you want to view.
3. Choose **Nine-Box Rating** from the **Complete tasks** menu.
4. Choose both a **Potential rating** and a **Performance rating** for the respective employee.
5. Select **Submit**.

View Nine Box Ratings in the Data Sheet

Use the Data Sheet to view employees' nine-box ratings to get a holistic view across your organization or team.

1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet** page, choose **Select columns**.
3. Select the following columns to display: **Performance Rating**, **Potential Rating**, and **Nine Box Group**.
4. Optionally, you can just filter the **Data Sheet** to show only your team or department. Learn more.

Installing the Nine box bundle

Packages: Basic | Standard | **Premium**

Roles: Technical Owner | Owner

The below information is for ChartHop users with permission to modify fields and forms and install ChartHop bundles.

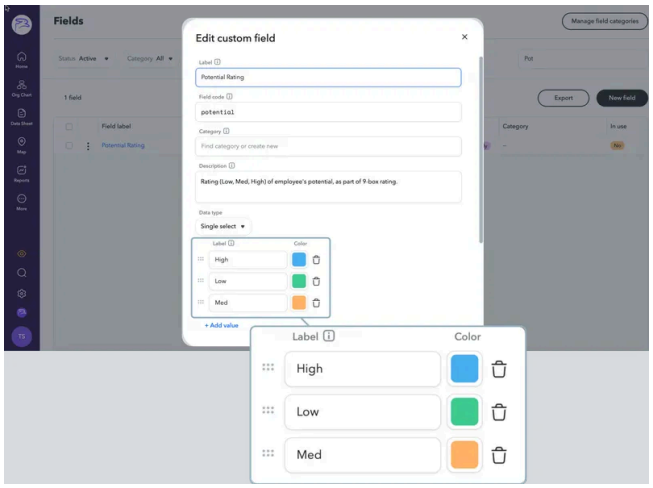
Install the Nine box bundle

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Availible Bundles** tab to see the list of bundles.
4. Within the Available bundles tab, select a bundle to see an overview of your selected bundle and what it contains.
5. Within the Bundle dialog box, select **Install** to install the bundle.

Customize the Nine box bundle

You can customize the values of nine box fields to match the language your organization wants to use to define nine box ratings. It would be best if you made any edits to fields before you start using them to maintain the integrity of the data collected. **Learn more.**

1. From the left sidebar, select **Data Model**.
2. From the sub-menu, select **Fields**.
3. From the row menu (⋮) next to the field to edit, select **Edit**.
4. In the **Edit custom field** dialog, edit the description of the field and/or the labels used for the fields.



5. Select **Save** when finished making changes.

Nine box form

Form	Data Sensitivity
Nine Box Rating	Manager-only

Nine box fields

Field name	Values	Data Sensitivity
Potential Rating	• Low • Medium • High	Manager-only
Performance Rating	• Under • Expected • Outstanding	Manager-only
Nine box (smart calculation field; cannot be directly edited)	1-9	Manager-only
Nine box group (smart calculation field); cannot be directly edited)	• Future Leader • Growth Employee • High-Impact Performer • Trusted Professional • Enigma • Core employee • Effective • Dilemma • Under Performer	Manager-only

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

4.5.4. Shoutouts

Shoutouts enable employees to recognize each other across your organization.

For example, if someone from your marketing department wants to compliment their graphic designer teammate publicly, they can write up a quick paragraph and have it posted to the graphic designer’s employee profile. The “shoutout” appears on their profile page and is visible to anyone who views the employee profile.

You can even track which of your employees have received shoutouts from others by using the Data Sheet page. Encouraging your teams to use shoutouts helps foster a positive culture.

Give an employee a shoutout

Any employee can give another employee a shoutout and shoutouts are visible to all employees through respective employee profile pages.

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you want to view.
3. In the employee's profile summary, select **View profile**.
4. Choose **Shoutout** from the Complete tasks menu.



1. Use the **Shoutout** dialog to enter the text you’d like to share with the employee.
2. Select **Submit**. The shoutout displays on the Shoutout tab of the employee’s profile.

View Shoutouts

You can view employee shoutouts (including your own) by navigating to the respective employee's profile page.

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you want to view.
3. In the employee's profile summary, select **View profile**.
4. Select the **Shoutout** tab to view any shoutouts.

Installing the Shoutout bundle

If your ChartHop package did not come with the Shoutout bundle installed, you can install it.

> **Packages:** Basic | Standard | **Premium**
>
> **Roles:** Technical Owner | Owner

You can customize the shoutout form that employees use to give shoutouts. You can modify the text on the dialog, as well as add ways to add additional information aside from just filling in text. If your organization uses Slack and has integrated ChartHop with Slack, you can also configure shoutouts to automatically be sent to a specific Slack channel.

1. From the left sidebar, select **Apps & Bundles**.
2. From the sub-menu, select **Bundles**.
3. Select the **Availible Bundles** tab to see the list of bundles.
4. Within the Available bundles tab, select a bundle to see an overview of your selected bundle and what it contains.
5. Within the Bundle dialog box, select **Install** to install the bundle.

Customize the Shoutout bundle

You can add additional fields to the Shoutout form that is used and customize the text used on the dialog box that the employees see.

1. From the left sidebar, select **People Ops Tools**.
2. From the sub-menu, select **Forms**.
3. Select the Shoutout form from the list.

4. In the Form builder, make the changes you want.
5. After making your changes, select **Preview** to view how the form will appear.
6. Select **Save and Exit**.

Shoutout fields

Field	Data Sensitivity
Shoutout	Org public

Shoutout form

Form	Data sensitivity
Shoutouts	Org public (except respective person)

Shoutout profile tab

Form	Data sensitivity
Shoutouts	Org public

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5. ChartHop for Administrators

Planning

Use ChartHop for headcount and compensation planning.

Managing employee data

Monitor data syncs and learn how to import data changes.

Dashboards

Create and view visualizations of your organization's data.

Managing people and jobs

Learn how to hire, transfer, terminate, and create jobs.

Performance reviews

Manage employee reviews.

Engagement surveys

Develop custom forms for engagement surveys.

Letter templates

The Goals page

Set, track, and cascade goals across your organization.

Create PDF documents for reviews, offer letters, and more

5.1. Managing data



[Sync history]

View how your data has been sync'd to ChartHop.



[Importing spreadsheet data]

Use spreadsheets to import employee data.



[Editing employee profiles]

Edit an employee profile.

5.1.1. Fields

Fields store information about your org, your people, and your jobs. Using ChartHop's built in fields and custom fields that you import or create, you can create an accurate data picture of your employee base. In ChartHop, you can customize any property of both custom and **built-in fields.**

Fields have the following properties:

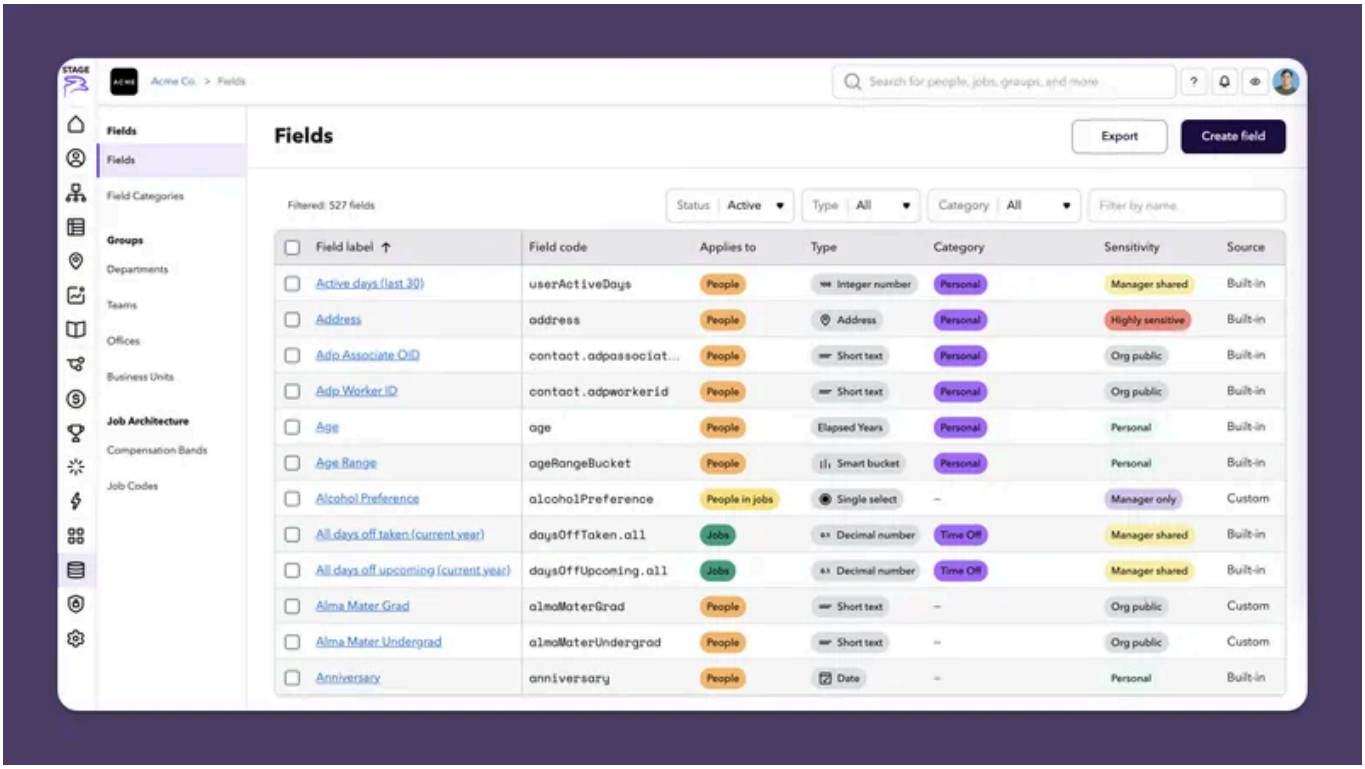
- **Field label** - the name of the field; the primary way it's identified in the app.
- **Field code** - a unique identifier for the field; used for refrencing the field in ChartHop's **Carrot Query Language (CQL)**.
- **Description** - communicates the purpose of the field. Helpful as you create more fields.
- **Applies to** - aligns a field to your foundational data models: person, a job, an open job or a person in a job. **Learn more.**
- **Data type** - The structure of information stored in a field, such as text, single select, date, or percentage. **See full list.**
- **Category** - A customizable grouping to organize your fields; **Learn more.**
- **Sensitivity** - The level of data access a ChartHop user must have to view this field's data. **Learn more.**
- **Source** - Built-in, Custom or Built-in (edited).
- **Hidden** - If a field is hidden it will not show up in your acccount outside of the fields page. This is useful for hiding unused built-in fields. Information stored on a hidden field will be retained.
- **Last modified by** - Who edited the field last, if a field was added by a bundle, you will see the name of the bundle here.
- **Last modified at** - the date when the field configuration was last editied.

Fields Page

View and manage fields from the **Fields** page. From the **Fields** page, you can:

- Filter fields by status, type or category

- Search for fields or field codes
- Export a list of fields
- Create custom fields
- Add fields to categories
- Show or hide fields
- Delete a custom field



View fields

You can view the list of fields available in your ChartHop organization from the **Fields** page.

You can customize the list to show only the fields you are interested in. See *Hide a Field* below.

To view and manage fields:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields**
3. Find a Field by:
    1. Selecting a column header to sort the list in ascending or descending order.
    2. Use the filters at the top of the page to customize which fields are displayed.
        - **Status** – Select **All, Active** or **Hidden** fields.

- **Type** - Select the kind of field that you are looking for
- **Category** – Select a category. The default view includes all categories.

3. Searching for the field by it's **Name** or **Field code**.

> If you want to find out more about how to create filters and calculations using fields, see the Carrot reference which include a list of supported fields. **Learn more.**

Override a built-in field

ChartHop supports renaming and overriding built-in fields to tailor them to your organization. For example, maybe your org calls *Departments*, "*Divisions*," or maybe you'd like personal phone numbers to be visible to the entire organization.

To override a ChartHop built-in field, simply click on the field and edit the attributes you wish to override.

To remove an override, simply click the *"Restore original settings"* button at the bottom of the Edit Field modal.

Export fields

You can export a list of fields as a CSV file when you need to review and audit your custom fields or select fields for a spreadsheet you're importing to ChartHop (**learn more**). Field exports contain information including label, code, type, formula, who the fields apply to, their date, and their sensitivity.

To export a list of fields:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. Select **Export**.
4. Select **Download** to download a CSV file containing your fields list.

Exporting fields allows you to see any **formulas** for calculated fields. They will look like this:

- Smart calculations: `Formula`
- Smart buckets: `Label 1: Formula 1; Label 2: Formula 2;`
- Built in Calculated Fields: `Built-in Calculation (FIELD)` these built in formulas are more complex and therefor can not be displayed in the export at this time.

Managing Fields

Edit a field

You can edit custom or built in fields if you need to change its settings. You can only edit custom fields that you have created, not built-in fields that come with ChartHop.

To edit a custom or built in field:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. Find the field and click on the field
4. In the **Edit field** dialog, make any needed changes.
5. Select **Save** to finish editing the field.

Use caution when editing the **field code** of a fields that are in use. If field codes are using in existing calculations or reports, they will not update. This does not apply to built in fields.

Duplicate a field

To duplicate a field:

1. From the left sidebar, select **Data Model.**

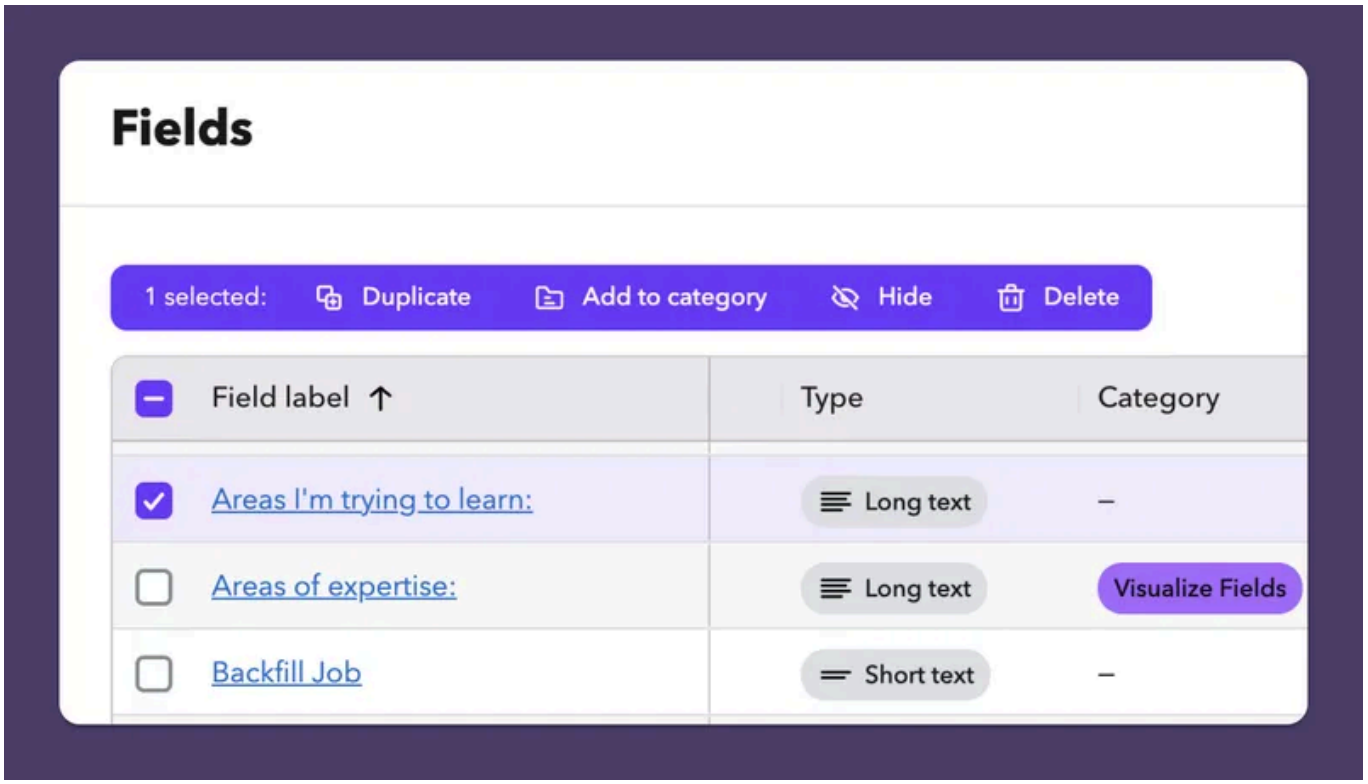
2. From the sub-menu, select **Fields.**
3. Select the checkbox next to the field, then select **Duplicate** from the action bar.
4. Configure the new field and **Save**.

Add a field to a category

To add a field to a category:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. Select the checkbox next to the field, then select **Add to Category** from the action bar.
4. Select or search for the category, click **Add**.

Alternatively, you can manage fields and categories on the **Categories** page.



Field Management Best Practice

- **Built in Fields**
  - If you are not using the field ➡ **Hide** the field
- **Custom Fields**
  - If you want to keep data stored to the field ➡ **Hide** the field
  - If you don't want to keep data to the field ➡ **Delete** the field

Hide a field

You can hide fields so that your users won't see them. When a field is hidden, it is hidden from everyone, regardless of any data sensitivity rules you've set. This includes forms, associated Carrot queries, and the **Data Sheet**. Hiding a field doesn't remove it from ChartHop, it only removes it from view.

You cannot delete, modify, recategorize built-in fields. However, you can hide them on the **Fields** page.

For example, if you have a time-sensitive employee survey that was sent out for a specific event, you can hide the fields after the event has passed and they are no longer needed.

When you hide a field that was previously added and saved as a column in a **Data Sheet** view, the hidden field continues to display in the **Data Sheet** view. To fully hide the field, you must remove the column from the **Data Sheet** view. Learn more.

To hide a field:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. Select the checkbox next to the field, then select **Hide** from the action bar.

To view hidden fields, select **Hidden** in the **Status** dropdown.

Unhide a field

If you want to unhide a field that you have previously hidden or view a list of all fields that are hidden, you can do so from the **Fields** page.

To unhide a field:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. From the **Status** menu, select **Hidden** or All to show all hidden fields**.**
4. Select the checkbox next to the field, then select **Hide** from the action bar.

Delete a field

You are able to delete custom fields. You are only able to **hide** built-in fields.

To delete a field:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. Select the checkbox next to the field, then select **Delete** from the action bar.
4. Confirm that you would like to delete the field.

Deleting a field will also delete all underlying data tied to the field.

Packages: Basic | **Standard** | **Premium**

Roles: Owner | Technical owner

5.1.1.1. Creating custom fields

Custom fields let you extend ChartHop's data model to capture information that matters to your organization — beyond what's available out of the box. Whether you're tracking certifications, t-shirt sizes, employment classification, or project assignments, custom fields put you in control of what data lives in ChartHop and how it behaves.

ChartHop supports a variety of **data types** for custom fields, including multiple-choice values, yes/no answers, dates, and **calculations**. You can also create text fields that allow you or your employees to answer in-depth questions for use in performance reviews or one-on-one conversations.

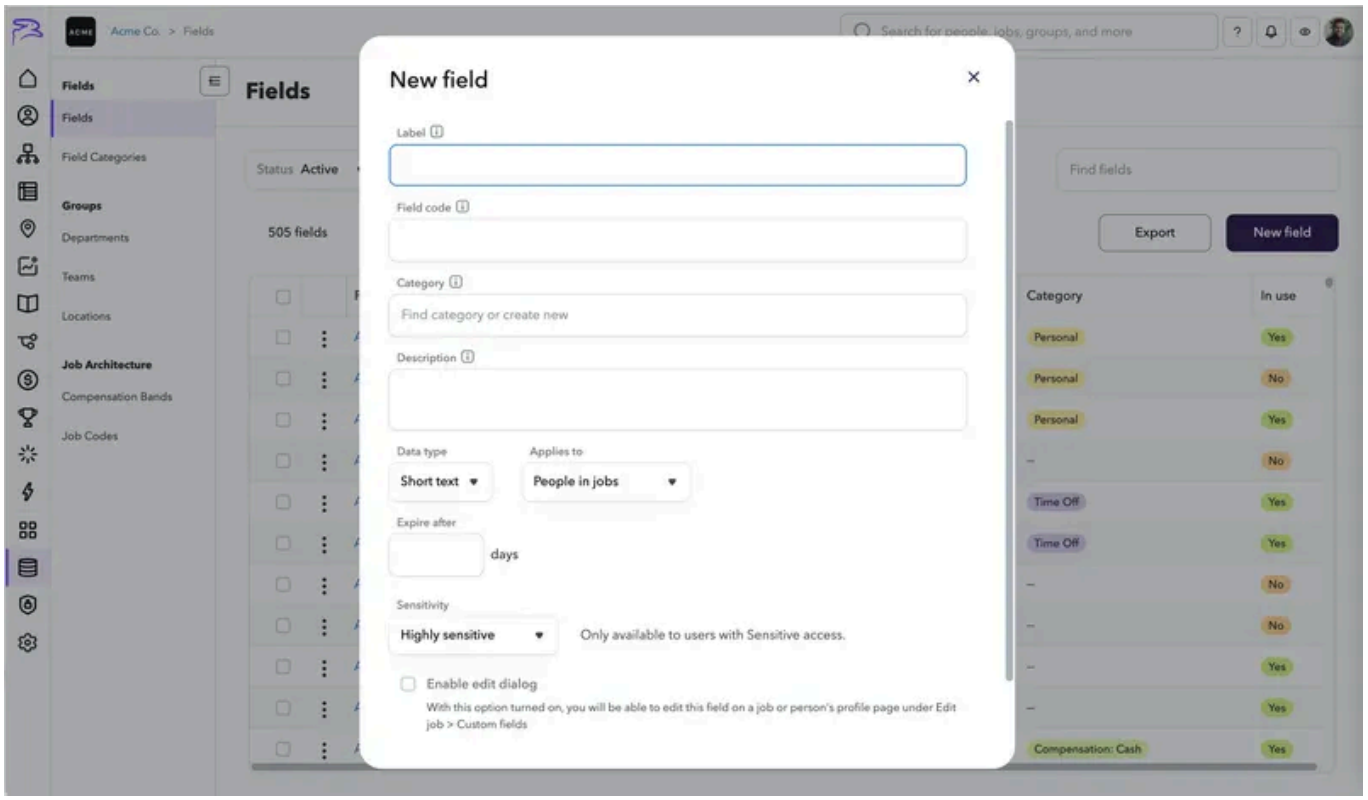
Depending on the data sensitivity options you select, you can view your custom data anywhere in ChartHop—such as on the **Data Sheet**, on the **Org Chart**, or in reports. When you create a custom field, you control access to the data at the field level.

Finally, you can organize your fields into **categories** so they are easier to work with. For example, you can create a Payroll category that holds any custom fields you have created for payroll information.

To get started, navigate to **Data Model > Fields.**

You'll see all fields in your org — both built-in and custom. Select **Create field** in the top right to open the field creation dialog.

> The number of custom fields you can add varies according to your ChartHop package. **Learn more.**



Creating a custom field

To add a custom field, complete the following steps:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**
3. On the **Fields** page, select **Create field**.
4. In the **Create field** dialog, configure your field. See the field configuration table below for descriptions.
5. Select **Save** to finish adding your custom field.

Field configuration

This table describes custom field configuration settings:

Setting	Description	Example
Label	The field's unique name. Enter a short, descriptive label that reflects the field's intended use. This label displays throughout ChartHop to your users. Field labels cannot begin with numbers. Once you have defined this label, you can easily change it later.	Portfolio link Performance Number
Field code	The field's internal code. This code is used for calculations and formulas within ChartHop. The field code is automatically generated. Field codes use only letters and numbers (no spaces or punctuation) and cannot begin with numbers. ChartHop recommends not changing the field code after it has been defined to avoid any potential calculation and report errors.	portfoliolink PerformanceNumber
Category	How the field is grouped within ChartHop. This setting enables you to organize your fields by category. Categories are also used to control access to custom fields. For example, if you assign a custom field to the Personal category, only those with access to the Personal fields can view the data. **Learn more.** You can search for an existing category or enter a new one. When this is left blank, the field is added to the **Uncategorized** category.	Recruiting Performance
Description	(Optional) A short description of the field that describes its intended purpose. This description displays to all users who have access to the field.	This field stores links to the candidate's portfolio.

Setting	Description	Example
	If you are adding a smart field, be sure to add a description of how it works and what it does. **Learn more.**	This field stores the number rating given during a performance audit.
Data type	The type of information that the field stores. The data type determines how ChartHop captures and stores information. **Learn more.** You can select from the following options: • Single select • Multiple select • Numeric scale • Yes/No • Short text • Long text • Integer number • Decimal number • Money • Percentage • Date • Person • Persons • File • Address • Smart calculation • Smart bucket	Short text Percentage

Setting	Description	Example
Applies to	Where in ChartHop the field is used. **Learn more.**	People People (Time-Tracked) Jobs
Display formatting	How ChartHop displays the field's values. This setting only affects display formatting throughout ChartHop - it does not change the exact value that is entered and stored. You can select from the following: • **Rounded** - Indicates ChartHop displays values as rounded to the nearest whole number. • **Exact numbers** - Indicates ChartHop displays exact values. You can set the number of decimal places to display. This setting displays only for the **Percentage**, **Money**, and **Smart calculation** data types.	Rounded
Expire after	(Optional) The expiration for data added to this field (for example, when developing a form for a dated event).	Ex: 90 days
Sensitivity	The field's sensitivity level. This setting determines who can see and access the field throughout ChartHop. **Learn more.**	Org Public Personal Manager Only Manager shared Highly sensitive
Enable edit dialog	Whether users have the ability to edit this field directly from a person or job's profile page.	

Setting	Description	Example
Make the field unique	Whether the field values for this field must be unique. When enabled, ChartHop enforces that the value for this field must be unique (see section below). This setting displays only for fields with **Short text** or **Integer number** data types that apply to **people in jobs**.	
Auto-increment	Set up the field to automatically assign unique IDs to all Jobs.	Configuration instructions

Requiring a custom field value to be unique

In some cases, you may want to use a field to uniquely identify the respondent or employee associated with the data. One example of this is creating a custom field that is used to store a secondary employee ID.

When you mark a custom field as unique, you cannot update that field directly in ChartHop and the field displays as read-only. Unique fields can only be updated through a sync with another system or by doing a spreadsheet upload. This restriction helps enforce the unique value and prevent errors.

Only fields with **Short text** or **Integer number** data types that apply to **people in jobs** can be set as unique.

> **Packages**: Basic | **Standard** | **Premium**
>
> **Roles:** Owner | Technical owner

5.1.1.2. Field data types & smart fields

When creating custom fields, you can choose from a wide range of data types to define what kind of information each field will contain. The following table describes the available data types in ChartHop.

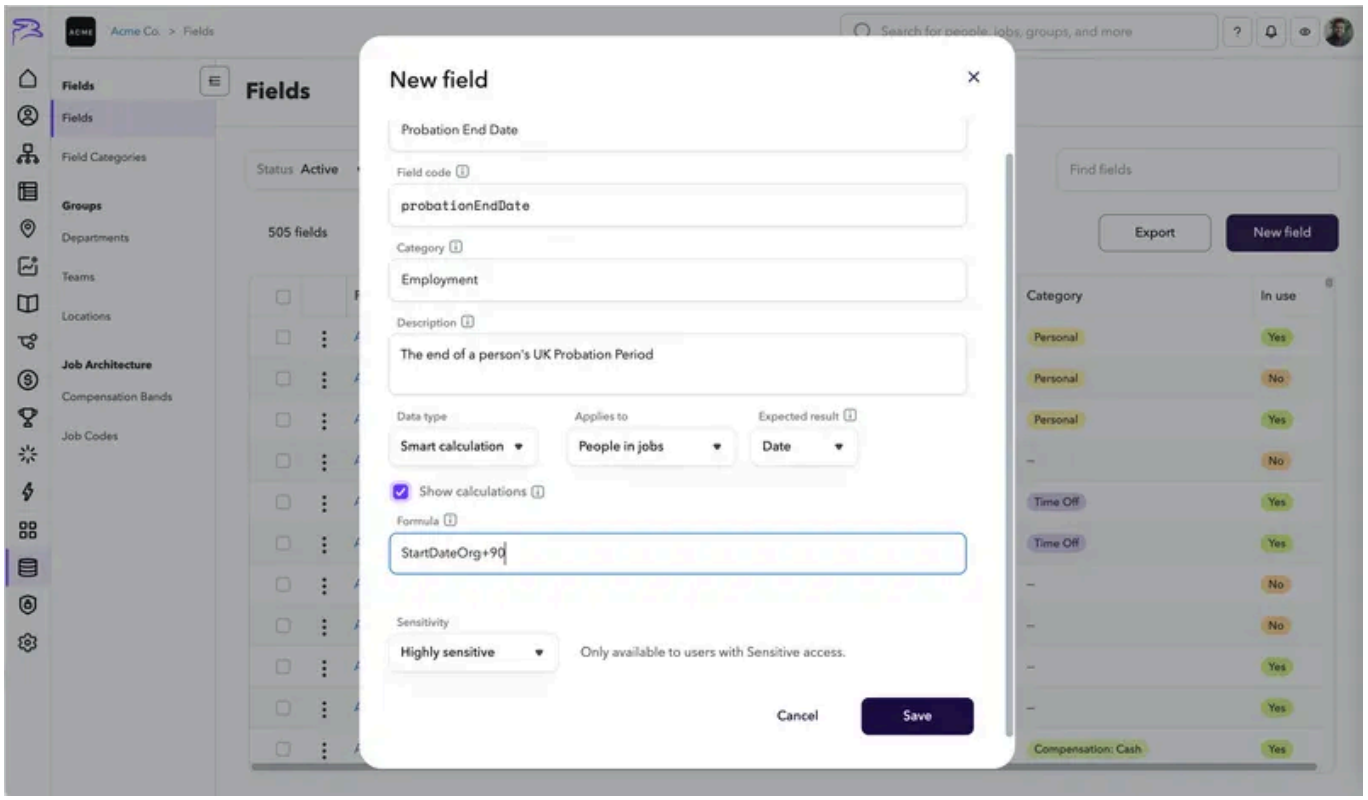
Data type	Description
Single select	Records a single response from a list of options. See **Enum**.
Multiple select	Records multiple responses from a list of options. See **Enum**. Note that each item in the list should be separated with a semi-colon when importing.
Numeric scale	Records a single response from a list of numbered options. See **Enum**.
Yes/No	Stores true/false values. See **Boolean**.
Short text	Stores short strings, such as a person's preferred name. See **String**.
Long text	Stores longer strings, such as a paragraph of text in a form response. See **String**.
Integer number	Stores whole numbers. See **Number**.
Decimal number	Stores both decimals and whole numbers. See **Number**.
Money	Stores currency values, such as `10 USD`. See **Money**.
Percentage	Stores percent values. See **Percent**.
Date	Stores dates. See **Date**.
Smart calculation	Calculates a numeric value using Carrot Query Language (CQL). See **Smart calculations.**
Smart bucket	Records a single response from a list of options. Each option contains a smart calculation. See **Smart buckets.**
Person	Stores individual people. See **Person**.
Persons	Stores multiple people, such as a group of peer reviewers on a form. See **PersonList**.
File	Stores uploaded files, such as an offer letter. See **File**.
Address	Includes Address line 1, Address line 2, City, State, Posta

The data type you select determines what kind of value a field can store. For example, a **number** field can only store a value like `56`. If you expect to receive responses containing either a **string** value (`fifty-six`) or a number value (`56`), use the string data type to capture them, since numbers will automatically be converted to strings (for example, `56` to `"56"`). If you need to store the responses as numbers for reporting purposes, you can create a second custom field that converts the value to a number. **Learn more**.

Smart Fields

You can create *smart fields* that automatically make calculations for you. You can use these fields in reporting and can control the expressions used to calculate the data. There are two kinds of smart fields: *smart calculations* and *smart buckets*. Each serves a different purpose and can help you build out simple or complex formulas to manage data.

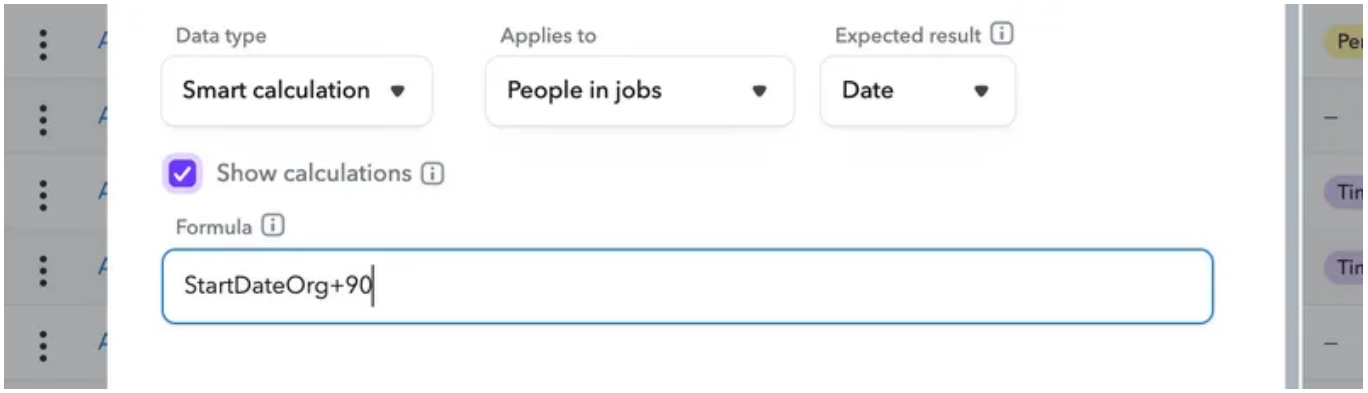
Smart fields use **Carrot Query Language (CQL)**, ChartHop's custom query language.



Smart calculations

Smart calculations contain a single Carrot expression, although that expression can be lengthy depending on the data being calculated. Smart calculations use algebra and basic math to return a single numeric value such as a dollar amount, a date, or a number.

For example, you can use a smart calculation to calculate a prorated salary or the number of jobs that have been open for more than 90 days (`is:open daysOpen>90`)



Smart buckets

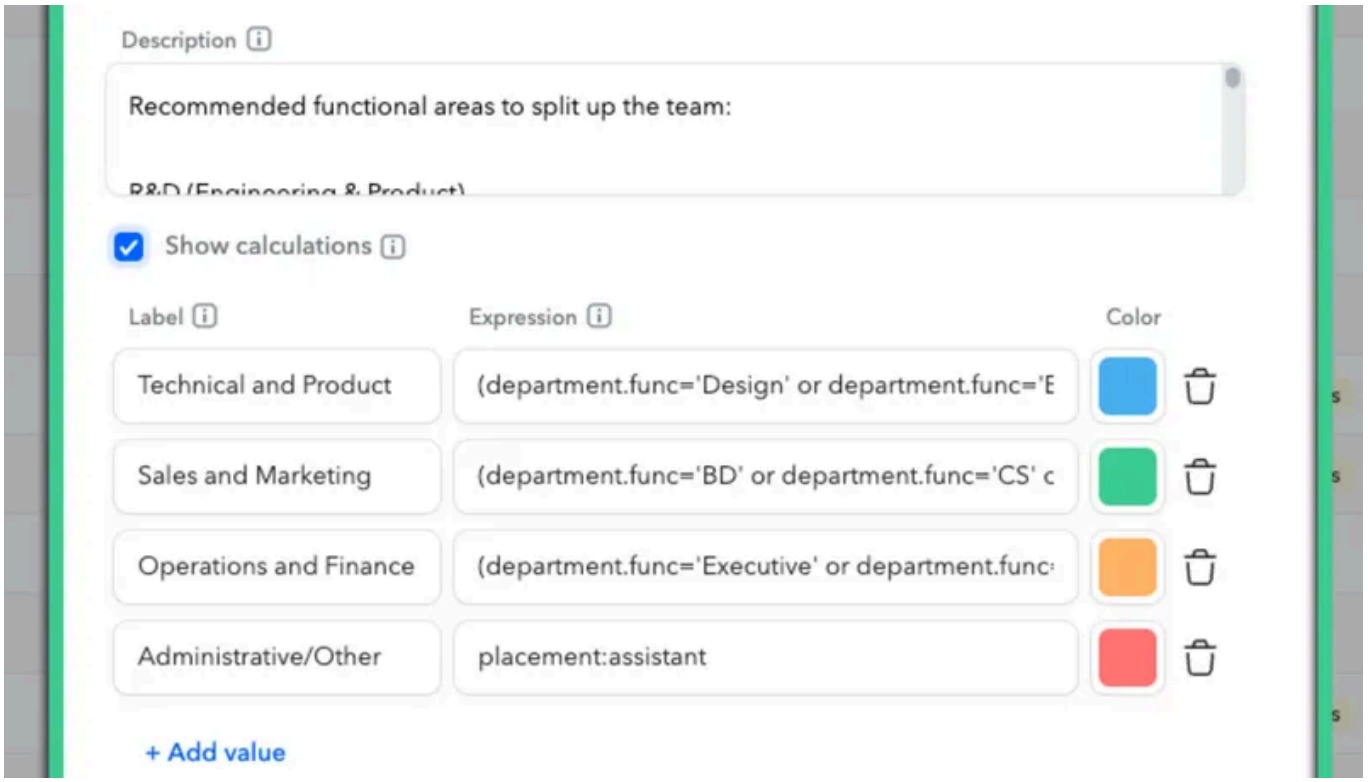
Smart buckets are single select fields that contain multiple Carrot expressions, one for each color-coded option. Smart buckets return data in a range of numerical values instead of a single number.

You can use smart calculations to tag or group employees with multiple options; for example, a set of salary guidelines or a group of functional areas.

In the following example, functional areas for an org are defined by these Carrot expressions:

- **Technical and Product** – `(department.func='Design' or department.func='Engineering' or department.func='Product' or department.func='Security') and placement:normal`
- **Sales and Marketing** – `(department.func='BD' or department.func='CS' or department.func='Marketing' or department.func='Sales' or department.func='Support') and placement:normal`
- **Operations and Finance** – `(department.func='Executive' or department.func='Finance' or department.func='General' or department.func='IT' or department.func='Legal' or department.func='Operations' or department.func='People' or department.func='Recruiting') and placement:normal`

- **Administrative/Other** – `placement:assistant`



5.1.1.3. Applies to

When you create a custom field, the first thing you'll configure is **Applies to**. This determines whether the field is attached to a person record or a job record, and that distinction shapes how data behaves across your org.

People — The field is tied to the individual employee. Data follows the person regardless of what role they're in. Use this for information that's fundamentally about a person, not a position.

```
Examples: T-shirt size, emergency contact, preferred name, dietary
restrictions, personal certifications
```

Jobs — The field is tied to the position itself. If a person moves into a different role, the data stays with the job. Use this for information that describes a seat in the org, not an individual.

```
Examples: Job level, cost center, headcount type, requisition ID
```

Not sure which to pick? Ask yourself: would this information still apply to the person if they changed roles? If yes, it's a People field. If it describes the role or position itself, it's a Jobs field.

Track changes over time

When **Applies to** is set to **People**, you'll see a **Track changes over time** checkbox. When enabled, every change to the field is stored with an effective date. You can view the full history of changes on a person's profile under **Personal History**.

Turn this on when you need a record of what the value was at any point in time — not just what it is today.

Turn it on for: Performance rating, job level, employment type, work location, visa status

Leave it off for: T-shirt size, dietary preference, emergency contact — data where only the current value matters

A note on legacy "People in jobs" fields: If your org was set up before mid-2024, you may see fields labeled **People in jobs** in your field list. This was an older field type that is no longer available for new field creation. It has been replaced by People fields with **Track changes over time** enabled. Existing People in jobs fields continue to work, so you may see them in your custom field list, but no new fields of this type can be created.

5.1.1.4. Categories

Use categories to organize your **Fields** and **Automated Actions**.

The categories you create are used in several places:

- **Fields** page
- **Select columns** dialog on the **Data Sheet**
- Inside of **Automated Actions**
- **Tasks** created by **Automated Actions** with a **Category**
- **Files & Document management**
- **User access controls** and **Defining a custom role**

Built in Categories

ChartHop comes with a set of built in categories that can be hidden but not deleted. Those categories are:

- Basic
- Compensation: Bands
- Compensation: Base
- Compensation: Cash
- Compensation: Total
- Compensation: Variable
- Compensation: Equity
- Personal
- Recruiting
- Structure
- Time Off
- Onboarding
- Offboarding

Best practice for using Categories

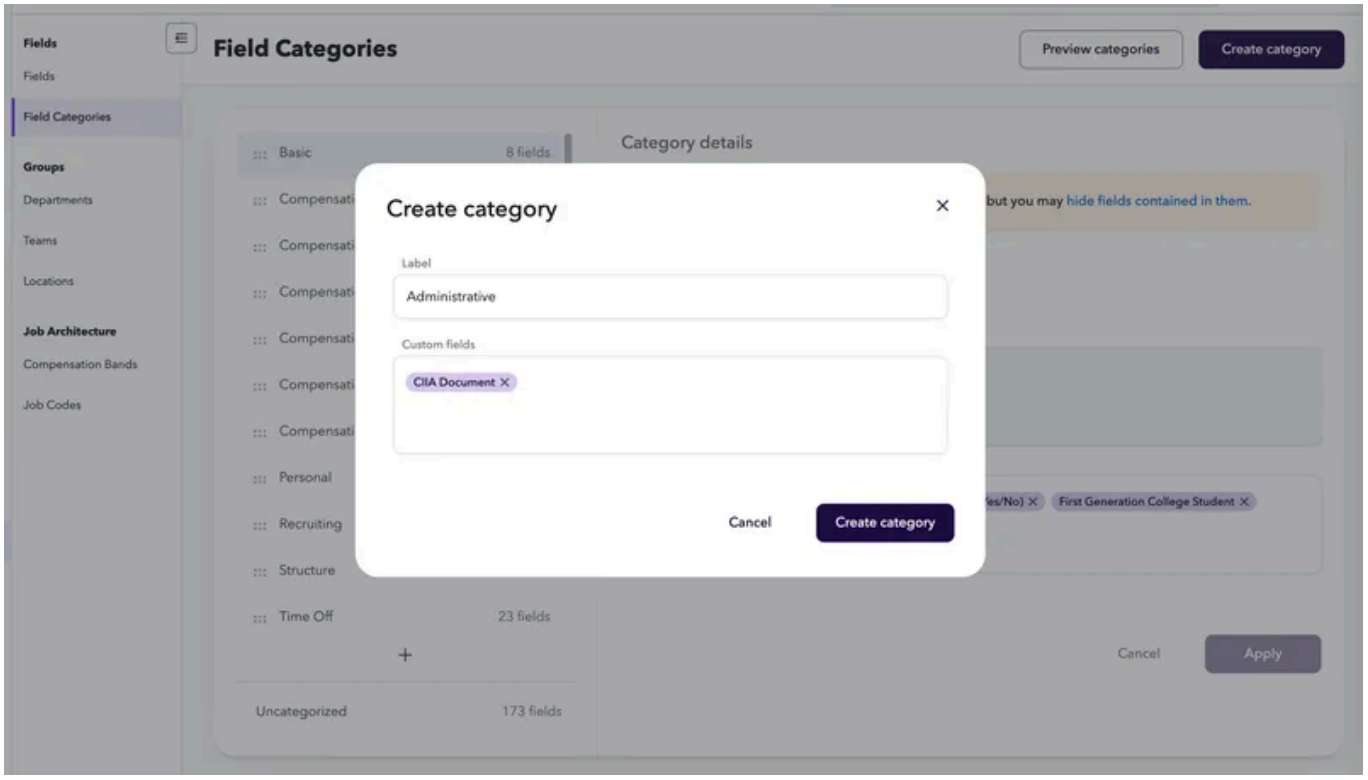
It is a best practice to add all fields to a category. Create categories for logical grouping such as "Performance" for your performance related fields.

Use built in groups when possible. Built in groups like Onboarding and Offboarding are used elsewhere in the app as default behavior

Keeping your fields organized can make things easier when using filters, creating Data Sheet views (adding columns), and using the Field list.

Create a field category

Create a field category when you want to categorize your custom fields. For example, you can create a new category to hold fields used in a custom form and then view the fields from that form on the **Data Sheet** in your new category.



Create a category

To create a field category:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Fields.**

3. On the **Field Categories** page, select **Create category**.
4. In the **Create category** dialog, add the following:
    - **Label** – Enter a category name for the **Select columns** dialog on the **Data Sheet**.
    - **Fields** – Select the custom fields to add to the category.
5. Select **Create category**.

Edit a field category

You can edit a field category that you've created when you need to rename it or add or remove fields from it. Although you can't edit the name of a built-in category, you can use it to categorize custom fields.

> You can't recategorize built-in fields.

To edit a field category:

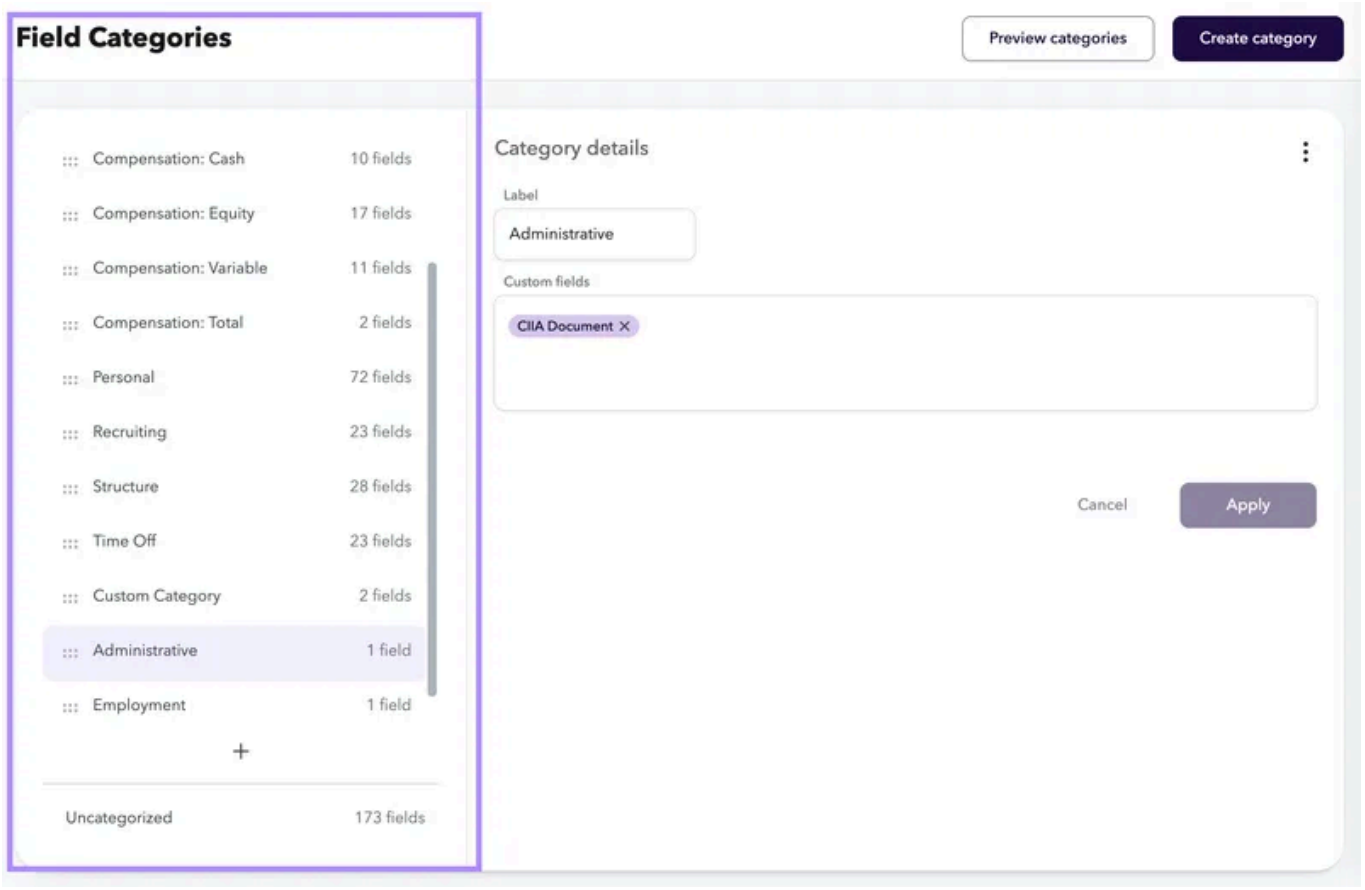
1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Field Categories.**
3. On the left side of the **Field Categories** page, select the category to edit. Make changes as follows:
    - **Label** – Rename the category.
    - **Custom fields contained** – Search for fields to add to the category or click the **X** to remove them.
4. Select **Apply** to finish editing the category.

Reorder a field category

On the **Field Categories** page, categories appear in the same order as in the **Select columns** dialog on the **Data Sheet**. You can use the **Field Categories** page to reorder categories as they appear there. These changes are made for all ChartHop users.

To reorder field categories:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Field Categories.**
3. On the left side of the **Field Categories** page, drag categories into the desired order.



Delete a field category

You can delete a custom category from the **Field Categories** page. Deleting a custom category doesn't delete the fields within it. Rather, those fields become **Uncategorized**.

To delete a field category:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Field Categories.**
3. On the left side of the **Field Categories** page, select the category to delete.
4. Select the Action menu (⋮) on the right side and choose **Delete**.
5. In the **Delete category** dialog, enter the category name.
6. Select **Delete**.

Preview the column chooser

After creating and managing categories, you can preview them to see what they'll look like in the **Select columns** dialog on the **Data Sheet**.

To preview categories:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Field Categories.**
3. Select the down arrow next to **New Category** and choose **Preview column chooser**.

Hide fields in a custom category

You can hide all fields in a custom category with a single action when you want to hide them from ChartHop. You can also hide individual fields. **Learn more**.

Hiding all fields in a category is a powerful action. Hidden fields are no longer visible in:

- Forms
- Data Sheet
- Scenarios
- History page

> To restore all hidden fields in a category, from the menu (⋮) on the right side, select **Restore contained fields**.

To hide fields in a custom category:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Field Categories.**
3. On the left side of the **Categories** page, select a category.
4. Select the Action menu (⋮) on the right side and choose **Hide contained fields**.
5. In the **Hide field** dialog that appears if your fields are in use, select **Hide**.

5.1.1.5. Requiring fields when opening jobs

With required fields, you can guarantee that your jobs are entered consistently and synced correctly by requiring certain fields. You can make certain fields required when creating or modifying a job in your ChartHop organization.

When you mark a field as Required, the field must be filled when you create a job. If your new job doesn't contain the field, you are prevented from creating the job. You can enforce required fields when new jobs are created.

Once marking a field as Required, when opening up the Job dialog, a red asterisk will appear next to the required field.

> Required fields are not enforced for app syncs (e.g., payroll syncs or custom apps) and spreadsheet imports.

Required fields for ATS syncs

If you are working with an ATS system, you'll want to be sure that any fields that are used in both your ATS and ChartHop and are marked required in one system are also required in other. This prevents sync errors between ChartHop and your ATS.

5.1.1.5.1. Required fields list

You can configure both built-in fields and custom fields to be required. While you can set any custom field as a required field, only certain built-in fields are eligible to be set as required fields.

Built-in fields that can be made required

Some built-in fields support being set as required while other built-in fields are automatically required by default.

The following built-in fields can be made required:

Field name	Required	Additional notes
Job title	By default	
Manager	By default	
Placement	Configurable	
Department	Configurable	
Job code	Configurable	
Locations	Configurable	
Team	Configurable	
Employment	Configurable	
Comp band	Configurable	
Base	Configurable	
Planned grant (shares)	Configurable	Either this or Planned grant (value) may be marked as required at a time. Selecting one automatically deselects the other.
Planned grant (value)	Configurable	Either this or Planned grant (shares) may be marked as required at a time. Selecting one automatically deselects the other.

Field name	Required	Additional notes
Recruiting	Configurable	
Priority (Recruiting)	Configurable	
Hiring manager	Configurable	
Recruiter	Configurable	
Sensitive	Configurable	
Planned start date	Configurable	If marked as required, you will need to manually set the date under **Planned Start Date** in the **Recruiting** tab when you create or modify jobs.
Req code	Configurable	
Job description	Configurable	

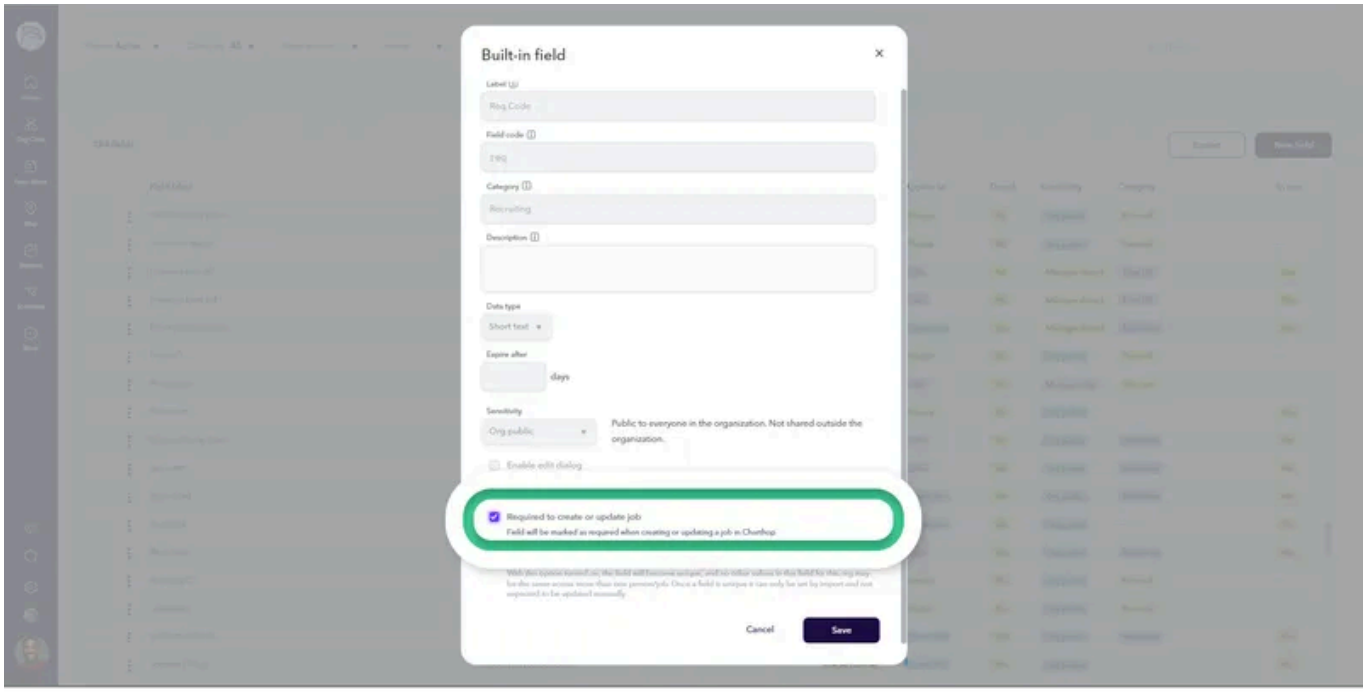
5.1.1.5.2. Setting required fields

When creating and editing a custom field in ChartHop, you can configure the field to be required.

To set a field to be required, you can either create a custom field or select an eligible existing ChartHop field. **Learn more**.

Make a Built-in field required

You can modify a ChartHop built-in field to be required when creating and editing jobs.

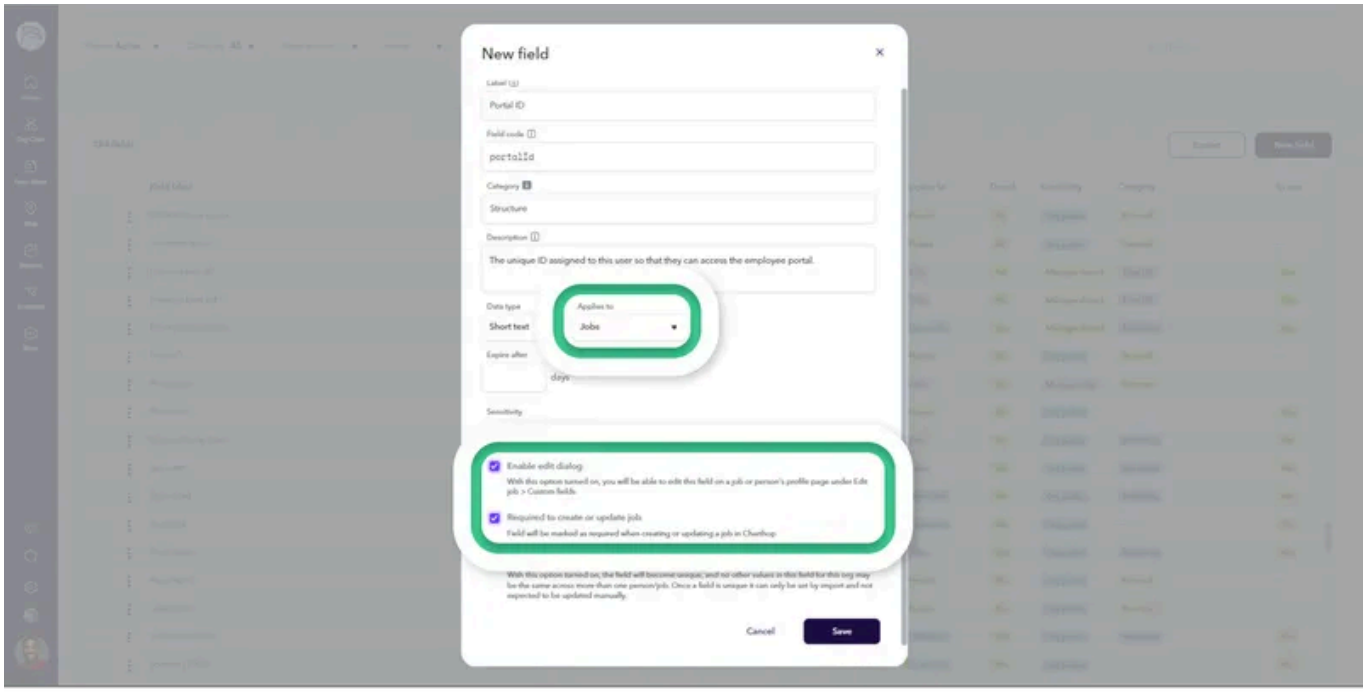


To make a built-in field required:

1. Select **Data Model** from the left sidebar
2. Select **Fields** from the sub-menu.
3. On the **Fields** page, select the ChartHop field you wish to modify.
    - Note that only a subset of built-in fields can be made required. **Learn more.**
4. Check **Required to create or update job**.
5. Select **Save** to finish modifying the built-in field.

Make a Custom field required

You can modify a custom field to be required when creating and editing jobs.



To make a custom field required:

1. From the left sidebar, select **Data Model.**
2. From the sub-menu, select **Field Categories.**
3. On the **Fields** page, select **New field**.
4. In the **New field** dialog, ensure that you have following settings:
    - **Enable Edit Dialog** is checked on.
        - This option will ensure that your field will appear in the **Custom tab** section of your job's profile page.
    - **Applies to** is set to **Jobs**.
    - **Required to create or update job** is checked on.
5. Complete the configuration of your field.
6. Select **Save** when finished.

5.1.1.6. Auto-increment fields

Auto-increment fields

Auto-increment fields automatically generate unique, sequential IDs for jobs in your organization. Each time a new job is created or synced into Primary, the system assigns the next available ID. You can pair auto-incrementing numbers with a prefix based on a **Text** field or **Group Code** to create structured identifiers like **ENG-0001**, **MKT-0001**, and **MKT-0002**.

> **INFO**
> Auto-increment IDs are only assigned to jobs in Primary. Jobs in Scenarios will not receive an auto-increment ID.

Auto-increment field properties

When you create an auto-increment field, you configure the following properties:

Property	Description
Field label	The name identifying the field in the app (e.g., Employee ID).
Prefix source	An optional Text or Group Code field used to generate a prefix for each ID. When set, IDs include the prefix value followed by the incrementing number (e.g., ENG-0001).
Number padding	The minimum number of digits displayed. Shorter numbers are padded with leading zeros (e.g., 0001 for 4-digit padding).
Separator	The character between the prefix and the number (e.g., a hyphen in ENG-0001).

Create an auto-increment field

To create a new auto-increment field:

1. From the left sidebar, select **Data Model**.
2. From the sub-menu, select **Fields**.
3. Select **Create Field**.
4. Enter a **Field label** and optional **Description**.
5. Under **Data type**, select **Auto-increment**.
6. (Optional) Select a **Prefix source** field. Choose a **Text** or **Group Code** field to generate prefixed IDs (e.g., selecting Department produces IDs like ENG-0001).
7. Configure the **Number padding** and **Separator** as needed.
8. Select **Save**.

A confirmation modal appears to let you know the system will automatically populate IDs for all existing jobs in Primary. Select **Confirm** to proceed.

> **NOTE**
> After saving, the system assigns an auto-increment ID to every existing job in Primary. This process runs in the background and may take a few moments depending on your organization's size.

How auto-increment IDs work

Automatic assignment

Whenever a new job is created or synced into Primary, the system automatically assigns the next available auto-increment ID. No manual entry is required.

Prefix behavior

If you configure a prefix source, the ID combines the value of that field with the incrementing number. For example, if the prefix source is set to **Department** and a job belongs to the Engineering department, the generated ID is **ENG-0001**. Each prefix maintains its own independent sequence:

- ENG-0001, ENG-0002, ENG-0003 (Engineering)

- MKT-0001, MKT-0002 (Marketing)
- FIN-0001 (Finance)

Manual editing

You can manually edit an auto-increment ID directly in the Data Sheet. This is useful if you need to correct or override a specific value.

WARNING
The system validates that all auto-increment IDs are unique. If you enter a value that already exists, the system rejects the change and prompts you to use a different value.

Scenarios

Jobs in Scenarios are not assigned auto-increment IDs. IDs are only generated when a job exists in or is synced into Primary.

Best practices

- **Choose a meaningful prefix source.** Fields like Department or Location Group Code make IDs immediately recognizable across the organization.
- **Set sufficient number padding.** If you expect more than 999 jobs per prefix, use at least 4-digit padding to keep IDs consistent in length.
- **Avoid editing IDs unless necessary.** The system manages uniqueness automatically. Manual changes increase the risk of conflicts.
- **Plan your configuration before saving.** Once the field is saved, existing jobs in Primary are populated immediately.

Frequently asked questions

What happens if I delete an auto-increment field?

Deleting the field removes all stored auto-increment IDs from your organization. This action cannot be undone.

Can I use the same auto-increment field across multiple data models?

Auto-increment fields apply to jobs. They're available wherever job data is displayed, including the Data Sheet and org chart.

What happens when a job is moved between departments?

The existing auto-increment ID stays with the job. It does not change when the prefix source value changes. New IDs reflect the current prefix at the time of assignment.

5.1.1.7. Job matching for payroll syncs

ChartHop provides *Job code matching* which allows you to connect your open jobs and new hires between ChartHop and your payroll systems.

With job code matching you can create custom fields that map data between ChartHop and your preferred payroll system allowing you to:

- Match jobs between ChartHop and your payroll system without needing to rely on an ATS.
- Prevent the creation of duplicate jobs.

To use requisition code matching, your setup must do the following:

1. Your new roles must be opened directly in ChartHop.
2. New hire information must only come in from payroll syncs and **not** from an ATS.
3. Your payroll system must have some type of system where unique codes are assigned to jobs such as a job, requisition, or budget code, and those codes must be API accessible.

Use case: Syncing new hire information automatically into open ChartHop jobs

Anya's organization hires several new software engineers and captures the information in their payroll system, including a req code for each job. Anya wishes to sync the new hire data like salaries, addresses, phone numbers, emails, and other information from her payroll system into ChartHop. Anya's company does not integrate ChartHop with an ATS system.

- Within her payroll system, Anya uses a field called "**Req code**" to associate an alphanumeric code with new jobs.
- Anya creates a custom field in ChartHop called "**Req code**".
- Within ChartHop, Anya creates a new job of a **Software Engineer** and assigns the same req code as is associated with the open job in her payroll system such as **ENG-110.**

When Anya runs a new payroll sync, the jobs created in ChartHop with the matching **ENG-110** are updated with all the mapped information from the payroll system.

Set up job code matching

To configure your ChartHop organization for job code matching, you must:

1. Decide whether to use an existing ChartHop field or create a new field to be used for the matching job code.
2. Work with ChartHop implementation to have the new field mapped and the option turned on for your org.
3. After implementation, ensure that each time you open a job, you complete the ChartHop field. The value for the ChartHop field must match the expected value from your payroll system in order for new jobs to be synced.

Configuring job code matching in your ChartHop organization requires the help of a ChartHop implementation specialist.

5.1.1.7.1. Setting up a job matching field

This section covers the process of setting up ChartHop fields to match open jobs and new hire data between ChartHop and your payroll system during payroll syncs.

Setting up job matching fields require the following steps:

1. Create a job matching field
2. Enable a job matching field
3. Map a job matching field

Create a job matching field

You can either create a custom field, or select an existing ChartHop field to have linked to your payroll system. **Learn more**.

The field you create or use must meet the following requirements:

- Must be used only for mapping to the payroll field you choose.
- Must apply to jobs.
- Must be short text.

When creating a custom ChartHop field, be sure to check the **Enable edit dialog** option to ensure that the field will appear in the **Custom tab**, section of your job's profile page.

Enable a job matching field

After creating your matching field in ChartHop, it can be enabled with the assistance of a ChartHop implementation specialist.

> Contact **ChartHop support** to activate your custom field and enable it for use in your organization.

Map a job matching field

After selecting a valid field in ChartHop, you now need to link it to a field in your payroll system. To link the two fields, you must set up a field mapper connection in your ChartHop

payroll integration app's configuration settings.

To map your job matching field between ChartHop and your payroll system, do the following:

1. From the left sidebar, select **App & Bundles.**
2. From the sub-menu, select **Apps.**
3. On the **Apps** page, Select the **Installed Apps** tab.
4. Scroll down the list and select your payroll's integration app.
5. Install and apply the app's basic needed configurations if not yet installed.
6. Select the **Field mappers** tab.
7. Select **Add Field Mapper**
8. In the **ChartHop Field**, enter your custom or built-in job matching field.
9. In the **Remote Field**, add your payroll system's remote job field.
10. Select **Save**.

5.1.1.7.2. Using a job matching field

Once you have a job matching field configured and mapped in ChartHop, you can match jobs from your payroll system to the jobs you create in ChartHop. Just apply your payroll system's job code value to a custom job matching field when creating and editing jobs in ChartHop. When you have associated ChartHop open jobs with matching job codes from your payroll system, those open jobs are updated with any new hire information during your payroll sync.

> To prevent data sync errors, ensure you associate each ChartHop job with the related job code value.

To match a ChartHop job to a new hire from your payroll system data:

1. From the left sidebar, select **Org Chart.**
2. In the **Org Chart**, create a new job by either:
    - Adding a direct report by selecting **Add a direct report** under a pre-existing person or role.
    - Creating a new job by selecting **New hire** under a pre-existing person or role.
3. In the **Create job** dialog, under the **Custom fields** tab, enter your job matching code.
4. Select **Save**

> Note that you can also set multiple job matching field code values to new jobs via a job data import through csv by adding a column for the field and setting the values.

5.1.1.7.3. Troubleshooting job matching fields

This section covers a series of potential issues you may run into when setting up or using fields in ChartHop to match payroll app requisition code, as well as their recommended solutions.

Creating ChartHop fields to match requisition codes

Does my job matching code have to use a custom field?

No, you can use a custom or built-in fields as long as the field type is a *short text*. We recommend using a custom field so that you can customize the name of your job matching field.

Can I have multiple open jobs with the same job matching code?

Yes. If you have multiple open jobs with the same job matching code, ChartHop will match the job with the req code set on it the earliest (note this may be different from which job was *created *earliest).

Does my custom field have a specific name like “req code”?

No. No, you can use any phrase to name your job matching code.

Using ChartHop fields to match requisition codes

Why can’t I find the job matching code value on a person?

The requirements for the job matching code are that the field belongs to a job. When you set up the mapper from the remote system → [job matching code field], ChartHop works behind-the-scenes and uses the job matching code to find an open job for a new hire, then discards the value.

If you want to see the job matching code value saved on a person, you can create a separate field and mapper to track that.

Do I need to delete the job matching code value from the person on the HRIS once the matching is complete?

No. The job matching code is only used on new hires and won't impact any employees who are already in ChartHop.

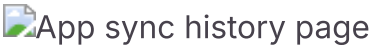
> Note that changing the value in the HRIS will still update the value on the underlying job in ChartHop.

Why didn't a(n) (existing) person transfer jobs when I changed their requisition code?

Code matching only applies to new hires and open jobs, not existing employees or internal transfers.

5.1.2. Sync history

On the **App sync history** page, you can view and manage data syncs between ChartHop and your Applicant Tracking Systems (ATS), Payroll, and Equity systems, along with spreadsheet imports.


App sync history page

Sync history access by role

Depending on your org role, there are restrictions on data and categories you can view in a particular sync. As a general principle, only users who have access and may need to manage the data being synced are able to see the relevant app sync. See the table below for a general list of sync details that each role has access to view:

Role	Access
Owner	Unrestricted access
Org Editor	Unrestricted access

Technical Owner	• Able to view all sync categories
	• Restricted view of sync details
	  ◦ ATS
	  ▪ Cannot see open job titles
	  ▪ Cannot see the data being synced
	  ◦ Payroll
	  ▪ Cannot see errors or warnings
	  ▪ Cannot download imported data

Recruiting Editor	May only view inbound or outbound ATS job data syncs.
Recruiters	May only view inbound or outbound ATS job data syncs.
Other roles	No access.

Understanding sync history information

On the **App sync history** page, you can view a list of information about your syncs including, their status, direction, cause, and summaries. The **App sync history** page contains a list view that lays out a summary of your sync history. By default, the list view displays the sync history of all ATS, payroll, and equity apps that you have installed in ChartHop.

Sync completed

The **Sync completed** column lists the completion time for a sync. You can select the link under the **Sync completed** column to access that particular sync's details page. Learn more.

App name

The **App name** column contains information about the specific app that had a sync (e.g., the name and the logo)

Status

The **Status** column tracks the result of a sync. Sync statuses are as follows:

Status	Description
Complete	The sync was successfully completed without errors.
Complete with Errors	The sync was completed, but experienced partial errors.
In progress	The sync is currently in progress. Note: ATS syncs will not show up on the sync history page until the entire sync is completed, and therefore, will not have an “In-Progress” status.
Failed	The sync did not complete successfully due to error(s).

Direction

The **Direction** column tracks a sync's data flow type. Directional sync types are as follows:

Type	Description
Inbound	Data is pulled from an external system to ChartHop, with the external system being the source of truth.
Outbound	Data is pushed from ChartHop to an external system, with ChartHop being the source of truth.

Cause

The **Cause** column tracks the reason a sync was triggered. Cause types are as follows:

Type	Description
Scheduled	Triggered automatically, based on the configurations set in an apps' settings page Typically occurs when "Run Daily" is selected.
Manual	Triggered manually,
Event-based	For ATS apps only. Triggered by a specific criteria or condition (e.g., candidate is hired in the ATS),
Web Service	For FP&A apps only. ChartHop data is made available for FP&A apps to pull from.

Summary

A sync's summary provides a high-level overview of the sync results.

To view more information about specific errors and/or warnings related to a sync, visit the sync's **App sync details** page by selecting the link found under the **Sync completed** column.

Requested by

The person responsible for initiating the sync. If the **Cause** of the sync triggered by a **Manual** or **Event-Based** action in ChartHop, then the column will display the name of the employee that triggered it. Otherwise, if the **Cause** of the sync is **Scheduled** or otherwise was triggered by an action in a remote system, then the column will display the name of the app.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

> **Roles**: Technical Owner | Owner | Org Editor | Recruiting Editor | Recruiter

5.1.2.1. Viewing sync history

You can view the data sync history of all payroll, equity, and ATS apps installed in your ChartHop organization on the **Sync & Import History** page or the **Sync History** Tab on the Manager App page. The page contains a list of details for each sync, including the date and time of its completion, status, direction, and the cause of the sync.

View sync status

On the Sync & Import History page

You can view the data sync history of all installed apps in your ChartHop organization from the **Sync & Import History** page.

To view your sync status, complete the following steps:

1. From the Admin menu (gear icon) in the left sidebar, select **Sync & Import History.**
2. View the **Status** column in the table, which shows one of the following status messages:
    - **Complete** - The sync was successfully completed without errors or warnings.
    - **Complete with Errors** - The sync was successfully completed along with minor errors or warnings.
    - **In progress** - The sync is currently in progress.
    - **Failed** - The sync was unsuccessfully completed along with major errors or warnings.

From the Manage App Page

You can view the data sync history of a specific app from the **Sync History Tab** within the App.

To view your sync status, complete the following steps:

1. Select **Apps & Bundles** from the left sidebar, then select the **Apps** page**.**
2. Select the app, such as **ADP**, that you want to view the sync history for.
3. Select the **Sync History** tab.

- This tab will not show up for every app. It will only show up if the app already displays sync history on the Sync & Import History page and the app has been synced at least one time.
- If you do not see the tab, check the Sync & Import History page.

4. View the **Status** column in the table and filter the results

Sync history filters

By default, the **Sync & Import History** page displays all syncs across all supported apps installed in your ChartHop organization.



Filter the sync history using various dimensions

You can filter the sync history results by the following parameters listed below:

- **App filter** - Filters syncs based on the app.
- **Status** - Filters syncs based on the sync status.
- **Direction** - Filters syncs based on the sync direction.
- **Start Date** - Filters syncs that were completed after the selected date.
- **End Date** - Filters syncs that were completed after the selected date.

You can also search the page using specific keywords in the **Summary** column (e.g., searching for a specific job title).

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Technical Owner | Owner | Org Editor | Recruiting Editor | Recruiter

5.1.2.2. Viewing sync details

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

You can view in-depth details for any of your syncs from the **App sync details** page. On this page, you can find more information about specific errors and warnings that occurred during a sync, along with other helpful information

View sync details

To view the details page of your sync history results, complete the following steps:

1. From the Settings menu (gear icon) in the left sidebar, select **Sync history.**
2. Select the **All apps** dropdown and choose the app you wish to use to filter by.
3. Select the date and time link from the **Sync completed** column to access that sync's details page.

When you access the details page of a sync, the information is structured in one of two ways, depending on the app and sync type.

Sync results for ATS requisitions and new hire data

If you have configured your ATS integration to use ChartHop as the source of truth (outbound), you can see a timeline of the sync activities that occurred between ChartHop and the ATS.

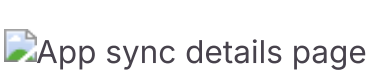
> Note: the level of detail you see for different syncs depending on your role and access level.



The **App sync details** page contains a summary of the sync including the person who triggered the sync, other corresponding events that occurred (e.g., creating a new Opening in the ATS), and information about any specific fields that were updated (either in ChartHop or in the remote system).

View sync results for other data flows

For all other apps, you'll see a detailed list of errors and warnings that occurred as part of the sync.



View sync results

The **Results** section of the app sync details page contains a summary of the sync including its status, completion date/time, duration, number of errors, and more.

The complete list of details captured in the **Results** section are the following:

Name	Description
Status	Contains a summary of the sync status (including if it completed successfully, failed, or completed with errors and the full date and time of completion).
Sync Duration	Displays the full duration of the sync in days, hours, minutes and seconds.
Requested by	The name of the employee or system (if automatic) that triggered the sync.
Total lines	The total number of lines that were synced.
Updates	The total number of updates that were made as part of the sync.
Warnings	The number of warnings that occurred as part of the sync.
Errors	The number of errors that occurred as part of the sync.

Download sync results

You can download the result logs of your sync results and export them into .csv and .txt files.

To access and download the sync history log, on the **App sync details** page, under the **Results** section, select **Download full log**.

Though the log file extension is a *.txt*, the actual structure of the data in the file is in *Json*.

View sync errors

The **Errors & Warnings** section of the **App sync details** page contains a summary of errors and warnings that occurred as part of the sync.

The complete list of details captured in the **Errors & Warnings** section are the following:

Field	Description
Line	The line number where an error occurred. To cross-check the relevant line, select “Export Synced Data” (or “Export Spreadsheet Data” for a spreadsheet import) and view the line in the downloaded .csv.
Level	The type of issue (error or warning) that occurred during the sync:
Message	The source of the error(s) or warning(s) that occurred during the sync.

Export sync results

You can download an export of the synced data. This can be useful if you need to reference the specific line in which an error or warning occurred, or if you otherwise want to cross-check the imported data.

To access and download a .csv of the synced data, select “Export synced data” (or “Export spreadsheet data” if a spreadsheet import).

5.1.2.3. Troubleshooting app syncs

If your sync fails and you receive errors or warnings, you can refer to the resources below to resolve common occurring issues.

Troubleshooting ATS apps

Below is a list of troubleshooting information for each supported ATS app:

App	Resource
Greenhouse	Troubleshooting the Greenhouse integration
Lever	Troubleshooting the Lever integration
Jobvite	Troubleshooting the Jobvite integration

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

Roles: Technical Owner | Owner | Org Editor | Recruiting Editor | Recruiter

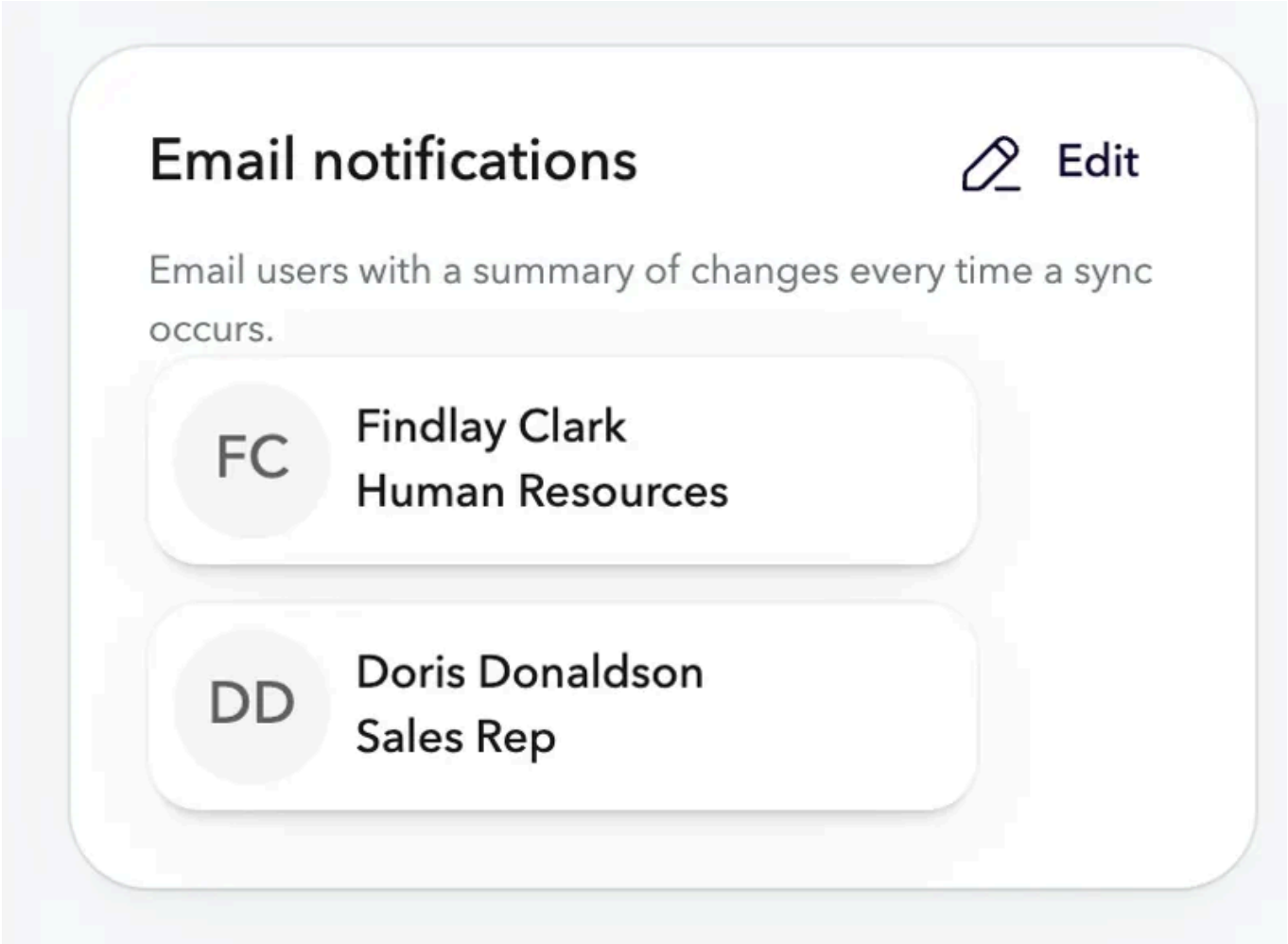
5.1.2.4. Sync notifications

On a per app basis, you are able to add people who will receive email notifications about the sync.

These notifications will not send for ever sync, but will *only* send if a sync actually makes updates and changes data.

To add people to receive notifications:

1. From the left sidebar, select **Data Apps and Bundle.**
2. From the sub-menu, select **Apps.**
3. Select the app you would like notifications for.
4. Find the box that says: **Email notifications** or **Send Notification Email To.**
5. Add the users who you would like to notify.

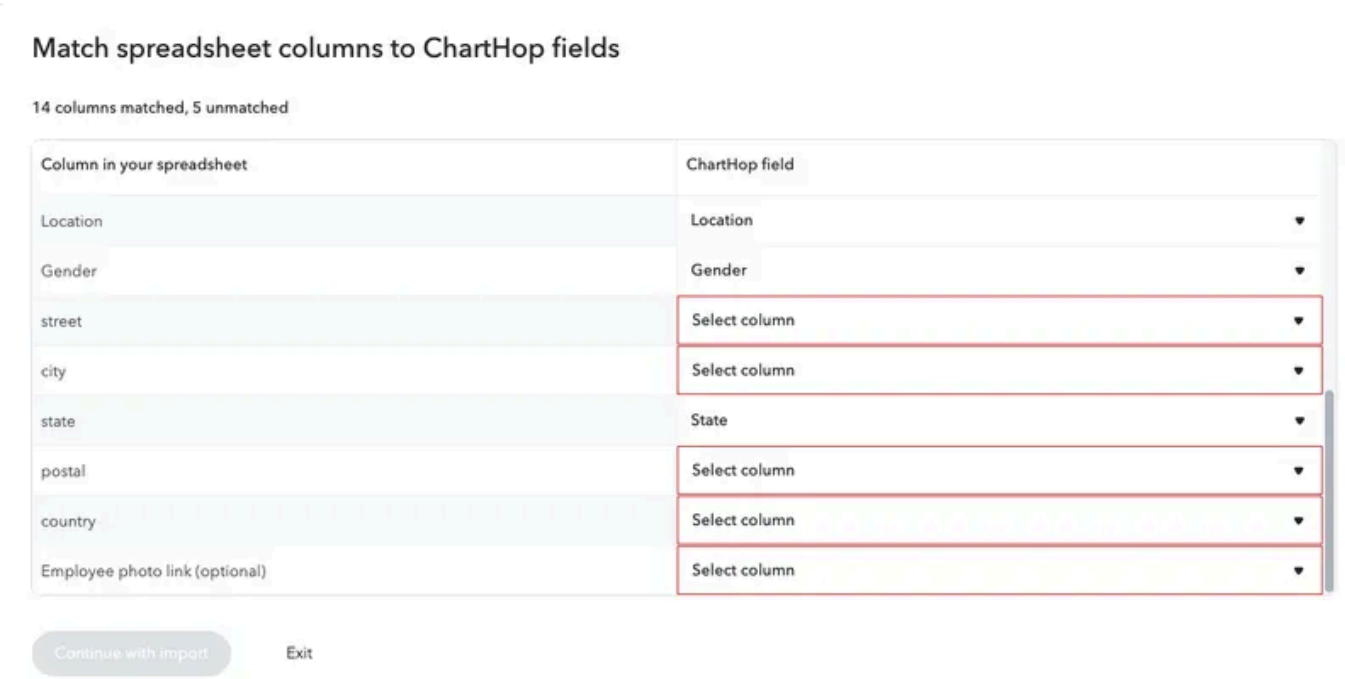


5.1.3. Importing spreadsheet data

ChartHop provides apps with which you can sync data from different payroll, equity, and applicant tracking systems (ATS). When your system is not supported or when you want to make bulk updates, you can import a CSV or a Microsoft Excel XLSX file.

Import spreadsheet data to ChartHop

The following image shows a section of the ChartHop spreadsheet upload process.



To import a CSV or Excel file to ChartHop:

1. Select **Admin (gear icon)** in the left sidebar, select **Import Spreadsheet data**.
2. On the **Import Spreadsheet data** page, drag your file to the target area.
    1. (Optional) Select **Allow spreadsheet to create new people and jobs** - use if your upload contains new people or jobs. If not checked, only existing people or jobs will be updated.
    2. (Optional) To create new **groups** in your ChartHop org, select **Allow spreadsheet to create new groups**. Note that this does not include **Job Codes**, or **Bands**, which must be created manually in ChartHop.
3. Select **Upload to org**.

4. For any fields in your spreadsheet that weren't automatically matched to a ChartHop field, select a ChartHop field to match to your spreadsheet column. You may need to scroll to see all unmatched fields, which are highlighted in red.
5. Once all columns are matched, select **Continue with import** to finish importing data.
6. (Optional) When upload is complete, select **View Details** to see a summary.

> When matching spreadsheet columns with ChartHop fields, select **None of these** to skip a column. Skipped columns are not imported.

Spreadsheet Templates & Guides

From the right side of the page, you can select and download templates of CSVs to use.

Add new people

Use this guided template to create new people in your org

Add new people Template.csv

Update current org

Make changes to existing people and jobs

Update current org Template.csv

Update org history

Make changes to historical org data

Update org history Template.csv

Add or update equity data

Create or make changes to stock grants and vesting schedules

Add or update equity data Template.csv

Add or update hiring plan

Create or make changes to open roles

Add or update hiring plan Template.csv

Formatting spreadsheets for import

When you format a spreadsheet file for upload to ChartHop, you should follow a series of guidelines listed in this section below.

File format for spreadsheet imports

When using Microsoft Excel, save files to XLSX, since Excel may corrupt files that are saved to CSV.

When importing a XLSX file, also be sure to do the following:

- Avoid empty columns.
- Enter complete job titles in any file to be uploaded (for example, "Senior Vice President" instead of "SVP"). ChartHop intelligently abbreviates titles in the org chart depending on how much screen space is available.
- Use the same kind of data in all similar fields. For example, use an email address in the Manager column if using Work email as the identifier for the employee.

Also note that columns are case insensitive and ignore spaces. For example, a column named "Base Comp" is the same thing as a column named "basecomp".

> You must include the country code as a part of any international number for it to be recognized as such within ChartHop. When you are syncing phone numbers from an external system, such as a payroll system or ATS, be sure the country code is included in the phone number that is listed in the external system. This also applies when updating data through a spreadsheet.

Identifiers for spreadsheet imports

When you add information to ChartHop, you need to tell it which job or person the data belongs to. ChartHop uses the first column in a spreadsheet as the identifier, and it usually prefers that to be a person's **Work email**. You can also create your own unique identifier using a custom field. **Learn more**.

> You can export existing employee data from the **Data Sheet** as a CSV file to use as a spreadsheet template for your changes. Once you are done editing that CSV file, you can import it back into ChartHop. **Learn more**.

> ChartHop Standard and Premium customers can add custom fields. If you are importing data to a custom field, be sure to first add the field to ChartHop. **Learn more**.

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

> **Roles**: Owner | Org editor

5.1.3.1. Add new people to ChartHop

You can import a CSV or spreadsheet file to add people to ChartHop. Ensure that the data in your file conforms to ChartHop's **formatting requirements**.

To add new people to your ChartHop organization, complete the following steps:

1. From the Settings menu (gear icon) in the left sidebar, select **Import Spreadsheet data**.
2. On the right side of the page, select **Add new people**.
3. Select **Download template**. A CSV template downloads to your computer.
4. Add your data to the CSV template, including any optional columns.
5. Save the template under a new name.
6. On the **Upload your spreadsheet** page, drag the template to the target area.
7. Ensure the **Allow spreadsheet to create new people and jobs** setting is selected. It is enabled by default.
8. (Optional) To create new **groups** in your ChartHop org, select **Allow spreadsheet to create new groups**. Note that this does not include **Job Codes**, or **Bands**, which must be created manually.
9. Select **Upload to org**.
10. For any fields in your spreadsheet that weren't automatically matched to a ChartHop field, select a ChartHop field to match to your spreadsheet column. You may need to scroll to see all unmatched fields, which are highlighted in red.
11. Once all columns are matched, select **Continue with import** to finish importing data.
12. (Optional) When upload is complete, select **View Details** to see a summary.

> When matching spreadsheet columns with ChartHop fields, select **None of these** to skip a column. Skipped columns are not imported.

Required columns

The following columns are required:

Column	Description	Example
Work Email	Employee's work email address; must be the first column.	`joan.smith@charthop.com`
First Name	Employee's first name.	`Joan`
Last Name	Employee's last name.	`Smith`
Job Title	Employee's job title.	`Senior Technical Writer`
Start Date	Employee's start date.	`1/5/2022`
Manager	Email address for the employee's manager.	`karen.jones@charthop.com`

Optional columns

The following columns are optional:

Column	Description	Example
Pref Name	Any first name or nickname that is different from legal name.	`Sunny`
Pref Last	Any last name or nickname that is different from legal name.	`Jones`
Middle Name	Full legal middle name.	`Trevor`
Employee ID	Alphanumeric string representing the employee.	`1001`
Base	Annual base income.	`$100,000`
Hourly	Hourly base income.	`$37.50`
Hours Per Week	Number of hours worked per week.	`40`
Variable	Annual bonus or on-target earnings (OTE).	`$20,000`
Variable Type	Type of variable compensation: bonus or commission.	`bonus`
Currency	Three-letter currency code, if non-USD, for the currency the job is paid in. **Learn more**.	`GBP`
Band	Name of the compensation band. Note that bands must be created first. **Learn more.**	`L3`
Date of Birth	Employee's birth date.	`12/26/1986`
Department	Department the person belongs to.	`Enterprise`
Employment	Employment status, as follows: • full - Full time. • part - Part time. • temp - Temporary. • intern - Intern. • contract - Contract. • expat - Overseas job with special tax status.	`full`

Column	Description	Example
Ethnicity	Employee's ethnicity.	`Asian`
Gender	Employee's gender.	`Male`
Location	Employee's geographic location.	`New York`
Team	The team or teams the employee belongs to; separate multiple teams with semicolons.	`Engineering; Technology`
Mobile Phone	Employee's mobile phone.	`7187778888`
contact.homePhone	Employee's home phone.	`7187778888`
contact.workPhone	Employee's work phone.	`7187778888`
Street 1	Employee's street address.	`222 Example St.`
Street 2	Employee's apartment, if any.	`#4E`
City	Employee's city.	`Brooklyn`
State	Employee's state.	`NY`
Postal Code	Employee's postal code.	`11209`
Country	Employee's country.	`US`

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

Roles: Owner | Org editor

5.1.3.2. Update your current organization

You can import a CSV or spreadsheet file to make updates to people in ChartHop. Ensure that the data in your file conforms to ChartHop's formatting requirements.

To update people in your ChartHop organization, complete the following steps:

1. From the Settings menu (gear icon) in the left sidebar, select **Import Spreadsheet data**.
2. On the right side of the page, select **Update current org**.
3. Select **Download template**. A CSV template downloads to your computer.
4. Add your data to the CSV template, including any optional columns.
5. Save the template under a new name.
6. On the **Upload your spreadsheet** page, drag the template to the target area.
7. (Optional) To create new people and jobs in your ChartHop org, select **Allow spreadsheet to create new people and jobs**. Note that this feature is set on by default.
8. (Optional) To create new **groups** in your ChartHop org, select **Allow spreadsheet to create new groups**. Note that this does not include **Job Codes**, or **Bands**, which must be created manually.
9. Select **Upload to org**.
10. For any fields in your spreadsheet that weren't automatically matched to a ChartHop field, select a ChartHop field to match to your spreadsheet column. You may need to scroll to see all unmatched fields, which are highlighted in red.
11. Once all columns are matched, select **Continue with import** to finish importing data.
12. (Optional) When upload is complete, select **View Details** to see a summary.

> When matching spreadsheet columns with ChartHop fields, select **None of these** to skip a column. Skipped columns are not imported.

Required columns

Work email is required, and should be the first column in your file.

Optional Columns

Include any of the following columns, depending on what information you want to update.

Column	Description	Example
Job Title	Employee's job title.	`sunny@charthop.com`
Manager	Email address for the employee's manager.	`john@charthop.com`
Pref Name	Any first name or nickname that is different from legal name.	`Sunny`
Pref Last	Any last name or nickname that is different from legal name.	`Jones`
Middle Name	Full legal middle name.	`Trevor`
Employee ID	Alphanumeric string representing the employee.	`1001`
Base	Annual base income.	`$100,000`
Hourly	Hourly base income.	`$37.50`
Hours Per Week	Number of hours worked per week.	`40`
Variable	Annual bonus or on-target earnings (OTE) in currency.	`$20,000`
variablePercent	Annual bonus in percent.	`20%`
Variable Type	Type of variable compensation: bonus or commission.	`bonus`
Currency	Three-letter currency code, if non-USD, for the currency the job is paid in.	`GBP`
Band	Name of the compensation band. Note that bands must be created first. **Learn more.**	`L3`
Date of Birth	Employee's birth date.	`12/26/1986`
Department	Department the person belongs to.	`Enterprise`
Employment	Employment status, as follows:	`full`

Column	Description	Example
	• full - Full time. • part - Part time. • temp - Temporary. • intern - Intern. • contract - Contract. • expat - Overseas job with special tax status.	
Ethnicity	Employee's ethnicity.	`Asian`
Gender	Employee's gender.	`Male`
Location	Employee's geographic location.	`New York`
Team	The team or teams the employee belongs to; separate multiple teams with semicolons.	`Engineering; Technology`
Mobile Phone	Employee's mobile phone.	`7187778888`
contact.homePhone	Employee's home phone.	`7187778888`
contact.workPhone	Employee's work phone.	`7187778888`
Street 1	Employee's street address.	`222 Example St.`
Street 2	Employee's apartment, if any.	`#4E`
City	Employee's city.	`Brooklyn`
State	Employee's state.	`NY`
Postal Code	Employee's postal code.	`11209`
Country	Employee's country.	`US`

Modules: **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

Roles: Owner | Org editor

5.1.3.3. Update your organization history

You can import a CSV or spreadsheet file to make changes to historical data such as promotion history, hire and departure history, and performance review history. Ensure that the data in your file conforms to ChartHop's **formatting requirements**.

To upload historical data to ChartHop, complete the following steps:

1. In the left sidebar, select the **Admin** menu (gear icon), then select **Import Spreadsheet data**.
2. On the right side of the page, select **Update org history**.
3. Select **Download template**. A CSV template downloads to your computer.
4. Add your data to the CSV template, including any optional columns.
5. Save the template under a new name.
6. On the **Upload your spreadsheet** page, drag the template to the target area.
7. (Optional) To create new **groups** in your ChartHop org, select **Allow spreadsheet to create new groups**. Note that this does not include **Job Codes**, or **Bands**, which must be created manually.
8. Select **Upload to org**.
9. For any fields in your spreadsheet that weren't automatically matched to a ChartHop field, select a ChartHop field to match to your spreadsheet column. You may need to scroll to see all unmatched fields, which are highlighted in red.
10. Once all columns are matched, select **Continue with import** to finish importing data.
11. (Optional) When upload is complete, select **View Details** to see a summary.

> When matching spreadsheet columns with ChartHop fields, select **None of these** to skip a column. Skipped columns are not imported.

Required columns

Column	Description	Example
Work Email	Employee's work email address; must be the first column.	`joan.smith@charthop.com`
Date	Date in the past when the update would have occurred.	`10/16/21`

Example update

The following table shows an example update where you change the job title and salary for two employees:

Work email	Date	Job Title	Base
john.smith@example.com	06/05/2017	Customer Success Manager	$100,000
wendy.carlson@example.com	08/05/2019	Engineer	$140,000

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Owner | Org editor

5.1.3.4. Importing historical data

You can upload historical data for current and terminated employees, including changes to departments, compensations, and titles. You can view historical data from both the **History** page as well as in any other place in ChartHop that uses the date slider tool, such as the **Org Chart** and the **Data Sheet.**

Types of historical employee data that can be tracked:

- Terminated employees
- Compensation changes
- Manager changes
- Department changes
- Title changes

> To upload multiple historical data categories at once for one or more employee(s), when uploading your spreadsheet, you must give each category its own tab.

When you import historical data to ChartHop, depending on the category above, it will only accept the import if the data is provided using the correct column headers.

You can use the examples below to learn about the required column headers for each category.

Historical data examples

The following section below provides templates you can use to upload historical data for employees in your ChartHop organization. Events that occur on unique dates should be reflected on new lines.

Terminated employees template

You can upload historical data for terminated employees. To do so, you will need to add the employee's employment information including:

- Full name

- First manager during their hire date (start date)
- Any manager and title changes during their tenure in the organization
- The end date of their employment

In the example below, we have the employment history for John the Software engineer:

Work email	Date	First name	Last name	Start Date	End Date	back fillJob	Manager Email	Title
johnW@job.com		John	Wick	4/01/2021			manager1@example.com	Software Engineer
johnW@job.com	01/01/2022						seniormanager@example.com	Senior software engineer
johnW@job.com					2/28/2022	no		

Line 1: John's new hire information is added including his work email (unique identifier), first and last name, start date of his employment, starting manager's email, and starting job title.

Line 2: John receives a promotion and a manager change on the same day. The date of the change was captured in the **Date** field.

Line 3: John's termination day is captured in the **End Date**. Also no planned backfills for his position.

Compensation changes template

You can upload historical data for changes to employees' compensation over time. To do this, add the employee's employment information including:

- Base salary
- Hourly compensation (optional if hourly compensation is used by your org)
- The currency that was used
- Any variable or base commission changes (reflecting Annual amounts)

Work Email	Date	Base	Hourly Comp	Hours Per Week	Variable Amount	Variable Percent	Variable Type	Currency
evan@job.com	04/01/2021	100,000				10%	Bonus	USD
evan@job.com	01/01/2022	115,000				15%	Bonus	USD
sarah@job.com	11/19/2020		50	32	5,000		Commission	USD
joy@job.com	01/01/2022		50	32		12%	Bonus	EUR

Line 1: Evan's base compensation of $100,000 is captured on April 1st, 2021 alongside a compensation of 10% of his yearly income.

Line 2: Evan receives a $15,000 yearly salary increase effective January 1st, 2022 alongside his bonus being increased by 5%.

Line 3: Sarah's pay is captured at $50 per hour while working 32 hours per week alongside a variable commission of $5000.

Line 4: Joy's pay is captured at $50 per hour while working 32 hours per week alongside a bonus of 12% of her yearly income.

Manager changes template

You can upload historical data for changes to employees' managers over time. To do this, you will need the dates of the changes, as well as the manager's emails.

Work Email	Date	Manager Email
larry@job.com	04/01/2021	pam@example.com
larry@job.com	01/01/2022	roger@example.com

Line 1: Larry was assigned a new manager on April 1st, 2021.

Line 2: Larry was then later assigned a new manager on January 1st, 2022.

Department changes template

You can upload historical data to reflect departmental changes for employees over time. To do this, you will need the dates of the changes, as well as the names of the departments.

Work Email	Date	Department
henry@job.com	04/01/2021	Engineering
ashley@job.com	01/01/2021	Product
ashley@job.com	06/01/2022	HR

Line 1: Henry was assigned to the engineering department on April 1st, 2021.

Line 2: Ashley was assigned to the product department on January 1st, 2021.

Line 3: Later that year, Ashley was reassigned to the HR department on June 1st, 2022.

Title changes template

You can upload historical data to reflect the changes to an employee's titles over time. To do this, you will need the dates of the changes, as well as the names of the titles.

Work Email	Date	Title
ben@job.com	01/01/2022	Senior Engineer
illen@job.com	06/11/2021	Accountant
illen@job.com	01/01/2022	Senior Accountant

Line 1: Ben's title was Engineer, but was then promoted to Senior Engineer on January 1st, 2022.

Line 2: Illen's title was Junior Accountant and was then promoted to Accountant on June 11th, 2021.

Line 3: In the following year, Illen was promoted to Senior Accountant.

5.1.3.5. Add or update equity data

When your company issues stock grants, you can import a CSV or spreadsheet file to ChartHop in order to track vesting schedules and compensation. Ensure that the data in your file conforms to ChartHop's **formatting requirements**.

To add or update equity data in ChartHop, complete the following steps:

1. From the Settings menu (gear icon) in the left sidebar, select **Import Spreadsheet data**.
2. On the right side of the page, select **Add or update equity data**.
3. Select **Download template**. A CSV template downloads to your computer.
4. Add your data to the CSV template, including any optional columns.
5. Save the template under a new name.
6. On the **Upload your spreadsheet** page, drag the template to the target area.
7. (Optional) To create new **groups** in your ChartHop org, select **Allow spreadsheet to create new groups**. Note that this does not include **Job Codes**, or **Bands**, which must be created manually.
8. Select **Upload to org**.
9. For any fields in your spreadsheet that weren't automatically matched to a ChartHop field, select a ChartHop field to match to your spreadsheet column. You may need to scroll to see all unmatched fields, which are highlighted in red.
10. Once all columns are matched, select **Continue with import** to finish importing data.
11. (Optional) When upload is complete, select **View Details** to see a summary.

> When matching spreadsheet columns with ChartHop fields, select **None of these** to skip a column. Skipped columns are not imported.

Required columns

The following columns are required:

Column	Description	Example
Work Email	The person's work email; must be the first column.	`jane.jones@charthop.com`
First Name	First name.	`Jane`
Last Name	Last Name.	`Jones`
Date	Date on which the grant was issued.	`5/1/2022`
Grant Price	Grant's strike price.	`$2.50`
Grant Shares	Total number of shares.	`5000`

Optional columns

The following columns are optional:

Column	Description	Example
Grant Vest Date	Date the grant's vesting schedule starts.	`5/1/2026`
Grant ID	Unique ID corresponding to the grant. Recommended, since you can use it to identify and edit existing grants in subsequent uploads.	`FY2021`
Grant Type	Type of stock grant, such as incentive stock options (ISO) or non-qualified stock options (NSO).	`ISO`
Grant Vest	Vesting schedule for the stock grant. See the following section for more examples.	`Q_4Y_1Y`
grantCancelDate	Date that an existing grant was cancelled; also allows a user to upload a cancelled grant.	`2/1/2022`

Specifying vesting schedules

Typical grant schedules consist of an interval, the length of the grant, and the cliff period.

For example, a grant might look like this: `M_4Y_1Y`, where `M` is the interval, `4Y` is the total length, and `1Y` is the cliff period.

Specifying the interval

Specify the interval with a single letter as follows:

- `Y` - Yearly
- `Q` - Quarterly
- `M` - Monthly

Specifying the grant length

Specify the grant length with a number and an interval as follows:

- `1Y` - One year
- `36M` - 36 months
- `3Q` - Three quarters

Ensure that the vesting period's total length is at least as long as a single vesting interval and is a multiple of that interval. In addition, cliff length must be less than or equal to the total length of the grant.

Specifying the cliff length

Specify the cliff length the same way as the total length. The cliff length must be less than or equal to the total grant length as follows:

- `1Y` - One year
- `36M` - 36 months
- `3Q` - Three quarters

To specify a negative cliff length, write the number using `MINUS_` instead of a hyphen, for example `MINUS_1Y` or `MINUS_12M`. If you don't include a cliff length, it defaults to zero.

Specifying vesting percentages

You can specify the vesting percentages for yearly, quarterly, and monthly vesting schedules.Whenyou omit the cliff and insert the percentage to be vested each year,

quarter, or month, in order, separated by underscores. See the following examples:

Vesting schedule	Meaning
`Y_4Y_40_20_20_20`	A four-year grant with no cliff, vesting 40% after the first year and 20% each following year.
`Y_4Y_0_20_30_50`	A four-year grant where the one-year cliff is built into the year-by-year percentages.
`Q_16Q_0_0_0_20_5_5_5_5_5_5_5_5_5_5_5_25`	A 16-quarter grant with no cliff, vesting 20% after the 4th quarter, plus 5% per quarter after that, and then ending with 25% in the final quarter.

Keep in mind that you must include as many percentages in the schedule as there are time periods.

Standard vesting schedules

ChartHop supports the following default vesting schedules:

Vesting schedule	**Meaning**
`M_4Y_1Y`	Monthly vesting over four years with a one year cliff.
`M_4Y_0Y`	Monthly vesting over four years with no cliff.
`Q_4Y_1Y`	Quarterly vesting over four years with a one year cliff.
`Q_4Y_0Y`	Quarterly vesting over four years with no cliff.
`Y_4Y_40_20_20_20`	Yearly vesting over four years, where 40% is vested the first year and 20% is vested during each of the three subsequent years.

Unsupported vesting schedule formats

If a schedule doesn't follow the accepted format or the stock grant doesn't have any vesting schedule at all, ChartHop does the following:

- Displays the schedule's name in the **Equity** tab as provided by the Equity sync or the string value given in the `grantVest` column during the CSV upload.

- Imports the grant as "unvested," and does not vest over time. When unvested grants appear in the **Equity Grants** table, their **Vesting Start** and **Vesting End** fields are blank.

Modules: **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

Roles: Owner | Org editor

5.1.3.6. Add or update a hiring plan

You can import a CSV or spreadsheet file to make changes to open roles. Ensure that the data in your file conforms to ChartHop's formatting requirements.

To upload a hiring plan to ChartHop, complete the following steps:

1. From the Settings menu (gear icon) in the left sidebar, select **Import Spreadsheet data**.
2. On the right side of the page, select **Add or update hiring plan**.
3. Select **Download template**. A CSV template downloads to your computer.
4. Add your data to the CSV template, including any optional columns.
5. Save the template under a new name.
6. On the **Upload your spreadsheet** page, drag the template to the target area.
7. (Optional) To create new **groups** in your ChartHop org, select **Allow spreadsheet to create new groups**. Note that this does not include **Job Codes**, or **Bands**, which must be created manually.
8. Select **Upload to org**.
9. For any fields in your spreadsheet that weren't automatically matched to a ChartHop field, select a ChartHop field to match to your spreadsheet column. You may need to scroll to see all unmatched fields, which are highlighted in red.
10. Once all columns are matched, select **Continue with import** to finish importing data.
11. (Optional) When upload is complete, select **View Details** to see a summary.

> When matching spreadsheet columns with ChartHop fields, select **None of these** to skip a column. Skipped columns are not imported.

Required columns

The following columns are required:

Column	Description	Example
Job title	The job title.	`Customer Service Manager`
Start date	The job's start date in m/d/yyyy format.	`6/1/2022`
Manager	The email address for the job’s direct manager.	`example@charthop.com`
Date	Effective date of job creation, in m/d/yyyy format.	`5/1/2022`

Optional columns

The following columns are optional:

Column	Description	Example
Location	The job’s geographic locations; separate multiple locations with semicolons.	`Los Angeles`
Department	The job's department.	`Enterprise`
Recruit	Recruitment status, as follows: • active - Job is being recruited. • passive - Inbound candidates are being reviewed, but no active search is in progress. • inactive - Job is not being recruited. • offer - Offer has been made, but not yet accepted. • pending - Hire has been made.	`active`
Sensitive	Whether the job is a sensitive or confidential role: • org - Can view information that is public to the org. • sensitive - Can view information only available to managers in the job’s reporting line. • high - Can view all highly sensitive information.	`org`
Priority	The job’s priority, as follows: • -2 - Lowest priority. • -1 - Low priority. • 0 - Medium priority. • 1 - High priority. • 2 - Highest priority.	`-1`
Team	The team or teams the job will belong to; separate multiple teams with semicolons.	`Engineering`
Recruiter	The email address of the recruiter responsible for the job.	`example@charthop.com`
Employment Status	The job’s employment status, as follows: • full - Full time job. • part - Part time job.	`full`

Column	Description	Example
	• temp - Temporary job. • intern - Intern. • contract - Contract job. • expat - Overseas job with special tax status.	
Base	The job's annual base income.	`$130,000`
Variable	The job's annual bonus or on-target earnings (OTE).	`$25,000`
variableType	The type of variable compensation for the job: bonus or commission.	`bonus`
Hourly Comp	The job's compensation if paid hourly.	`$50.00`
Currency	Three-letter currency code, if non-USD, for the currency the job will be paid in.	`GBP`
Band	Name of the compensation band the job belongs to.	`L3`
Planned Grant	Target stock compensation planned but not yet issued.	`$30,000`
placement	Where to place a job on the org chart: either normally or immediately below and beside the manager.	`normal`
jobDescription	Job description. While formatting is not maintained during CSV upload, you can edit descriptions in ChartHop.	Long-form text
indirect	Email address for the job's dotted line manager.	`example@charthop.com`
Lever Req ID	Identifying number for the open job in the Lever applicant tracking system.	81c64d2a-0c80-479d
Greenhouse Job ID	Identifying number for the open job in the Greenhouse applicant tracking system.	4656564003/538709703
Jobvite Req ID	Identifying number for the open job in the Jobvite applicant tracking system.	4441555300312643

Modules: **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

Roles: Owner | Org editor

5.1.3.7. Create a spreadsheet template

You can use the **Data Sheet** to design a spreadsheet that you can use to upload data. On the **Data Sheet**, you can select the columns you want to use in your spreadsheet and then download a .csv that can serve as a template for your import.

You need to include any required fields as columns. Required fields vary according to the type of data you are uploading. For example, when uploading data associated with an employee, you need to include the name of the employee and their manager.

> Uploading images via a spreadsheet is not supported. Be sure to deselect that column before downloading your .csv.

1. Select **Data Sheet** from the left sidebar.
2. Select **Select Columns**.
3. Select the columns you want to include in your spreadsheet template in the Select Columns dialog. Be sure to unselect the image column.
4. Select **Export CSV** or select the **Edit ▼** dropdown and select **Export CSV**. The **Export CSV** dialog displays.
5. In the **Export type** dropdown, select the **Data Sheet** export type.
6. Select **Export**.
7. Select **Download**. The spreadsheet opens in your default spreadsheet application.
8. Delete all of the rows in the spreadsheet except for the header row.
9. Complete the new spreadsheet and upload it to ChartHop.

Open a Data Sheet CSV download in Excel

When you open a **Data Sheet** .csv download in Excel, you're prompted with a Text Wizard to ensure the data displays correctly.

1. Open the file you downloaded in Excel.
2. In the Excel Text Wizard, select **Delimited** and select **Next**.
3. Select **Comma** and deselect **Tab**, and then select **Next**.

4. Select **Finish**.

5.1.3.8. Spreadsheet import examples

This topic provides examples and tips to help you use the ChartHop spreadsheet uploader. These include adding a job that reports to an open job, working with PTO updates, adding terminations, and more.

Uploading a person or job that reports to an open job

You can upload a person or job that reports to an open job. To do so, add a column for **Manager:req**, and in it, enter the requisition code for the open job. By doing this, you tell ChartHop that the manager for the job or person corresponds to a requisition code for an open job.

The example in the following table creates two jobs: a Customer Success Manager and a Director of Customer Success, both starting on the same day. The Customer Success Manager reports to the Director of Customer Success.

Job title	req	Start date	Manager	Manager: req	Date
`Customer Success Manager`	`job-123`	`8/1/2022`		`job-234`	`6/1/2022`
`Director, Customer Success`	`job-234`	`8/1/2022`	`jane.doe@chartho p.com`		`6/1/2022`

Uploading PTO changes

You can update paid time off for your people by uploading a spreadsheet to ChartHop. In the following example, two people have requested time off and one request is still pending:

Work Email	timeOffStartDate	timeOffEndDate	timeOffDays	timeOffApproval	timeOffID
`jane.smith@charthop.com`	`6/1/2022`	`6/6/2022`	`5`	`APPROVED`	`734`
`john.johnson@charthop.com`	`6/15/2022`	`6/19/2022`	`5`	`PENDING`	`543`

Required and optional columns

The following table describes required and optional columns for PTO uploads:

Column	Description	Example
Work email	Left-most column; identifies the person whose time off is being entered.	`john@charthop.com`
timeOffStartDate	Start date for the time off; required.	`6/1/2022`
timeOffEndDate	End date for the time off; required.	`6/15/2022`
timeOffApproval	Whether the time off was approved; optional. Has the following options: • APPROVED - Time off was approved. Default option. • PENDING - Time off is pending. • CANCELLED - Time off was cancelled. • REJECTED - Time off was rejected.	`APPROVED`
timeOffDays	Number of days requested; required.	`5`
timeOffHours	Number of hours requested; optional.	`40`
timeOffId	Unique identifier for each time off request. ChartHop recommends including this field since any subsequent PTO updates should include it as the left-most identifying column.	`734`
timeOffType	Type of time off; optional.	`PTO`
timeOffNote	Alphanumeric note about the time off; optional.	`I need to take my son to the doctor`

Uploading a person who is no longer employed

You can create a picture of your historical org by uploading people who are no longer employed. To do so, add an **End Date** column to the person's information.

If you want to avoid creating an automatic backfill, also add a **backfillJob** column with a value of `No`.

> Use the **Backfill** column with departures for which you don't want to create a backfill, but not for hiring plans and new positions.

To change the departure type, add a **Depart** column with a value of `Involuntary`. This value defaults to `Voluntary` if not provided.

The following table contains an example:

Work email	First name	Last name	Job title	Manager	Start date	End date	backfillJob	Depart
`john.smith@charthop.com`	`John`	`Smith`	`Engineer`	`fred.jones@charthop.com`	`1/1/2022`	`6/1/2022`	`No`	`Involuntary`

Uploading a person's job history

You can upload a person's job history via spreadsheet. As long as the person has already been created in ChartHop, you only need to include columns for information that has changed.

In the following example, a person has been promoted. Note that the **Date** column reflects the start date of each position:

Work email	Job title	Manager	Base	Variable Percent	Band	Date
`john.smith@charthop.com`	`Senior Engineer`	`john.doe@charthop.com`	`$120,000`	`20%`	`L3`	`1/1/2022`
`john.smith@charthop.com`	`Manager, Engineering`	`fred.smith@example.com`	`$150,000`	`30%`	`L4`	`6/1/2022`

Uploading departures or terminations

When you want to update ChartHop to reflect a termination or departure, you can upload a spreadsheet that contains the change. Note that ending a job will automatically create a backfill unless you add a **backfillJob** column with a value of `No`.

See the following table for an example of an involuntary departure with no backfill:

Work Email	End Date	depart	reason	backfillJob
`example@charthop.com`	`5/1/2022`	`Involuntary`	`Performance`	`No`

Uploading promotion title or compensation change

When you want ChartHop to reflect a promotion for an employee, you can upload a spreadsheet that contains the change. Note that a promotion must be associated with either a **title** change or **base** change. The value in the **Date** column will be the effective date of the change and will be reflected in the **Last promotion** field. To note a title or base change as a promotion, include the **Promotion** column in your CSV with the word **"Promotion"** as the value for that column.

In the following example, a person has been promoted and given a title and salary change, effective January 1st, 2024:

Work Email	Date	Title	Base Comp	Promotion
`John.Smith@charthop.com`	`1/1/24`	`Senior Engineer`	$150,000	`Promotion`

Using a custom first column for a people upload

ChartHop prefers **Work Email** as the first column in a people upload. However, you can use another unique identifier such as *payroll system ID*. When using payroll system ID as the first column, rename the **Manager** column to **manager:workEmail** and then add email addresses as normal.

In the following example, the first column is a Paylocity ID and the manager's work email appears in the **manager:workEmail** column:

paylocityID	First Name	Last Name	Job Title	Start Date	manager:workEmail
`12345`	`John`	`Doe`	`Customer Success Manager`	`1/5/2022`	`fred.smith@charthop.com`

Uploading org changes with different dates

To upload multiple org changes with different dates, add them on separate lines of your spreadsheet with different values in the **Date** column.

In the following example, John Smith received a title change on one date, but a salary adjustment on a different date.

Work email	Date	Title	Base
`john.smith@charthop.com`	`3/15/2022`	`Senior Customer Success Manager`	
`john.smith@charthop.com`	`6/15/2022`		`$100,000`

Updating name fields

When you update name fields, take note of the following guidelines:

- To update a person's preferred name, add columns for **First Name** and **Last Name** in addition to **Pref Name** and **Pref Last**.
- To update a person's middle name, add columns for **First Name** and **Last Name** in addition to **Middle Name**.

The following table contains an example.

Work Email	First Name	Last Name	Pref Name	Middle Name
`jane.smith@charthop.com`	`Jane`	`Smith`	`Joan`	
`john.johnson@charthop.com`	`John`	`Johnson`		`Jeremy`

Updating phone numbers

When you update phone numbers, take note of the following guidelines:

- **Phone** defaults to mobile number.
- Use **contact.homePhone** to update a home number.
- Use **contact.workPhone** to update a work number.

Importing multi-select fields

When you import fields with multiple selection options, take note of the following guidelines:

- The ChartHop field you are uploading to must support multi-selection.
- The values in the spreadsheet must be contained within the same cell, and separated by semi-colons.

See the following table for examples on importing multi-select fields:

Engineering Skillset	Badges	Owned Pets
`Backend;Frontend;Mobile`	`Diversity;Learning;Awareness;`	`Cat;Dog;Bird;Rabbit;Multiple`

Deleting imported jobs

You can delete jobs both individually and in bulk. To do this, you can upload a spreadsheet containing jobs that should be deleted using their Job IDs. ChartHop prefers Job IDs as the first column. Note that deleting a job will automatically create a backfill unless you add a **backfillJob** column with a value of `No`.

See the following table for an example of deleting a job and with no backfill:

Job ID	Change	backfillJob
`ACT1015`	`Delete`	`No`

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

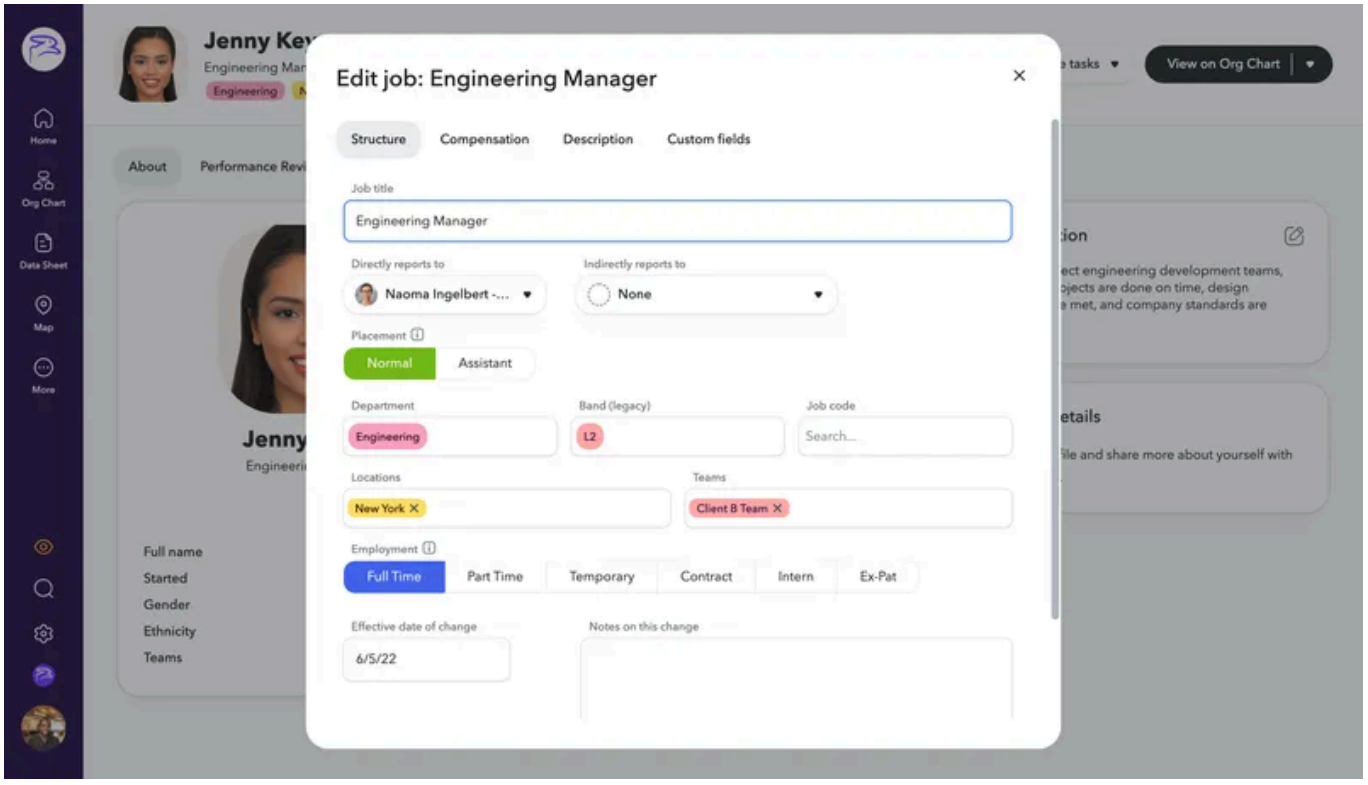
5.1.4. Editing employee profiles

As an Owner or Technical Owner, you can edit the job and personal profile information for members of your ChartHop organization from the employee profile view.

> Note that changes to job or person details will be overwritten according to the data sync settings of your ChartHop organization's payroll and ATS apps.

Edit job

You can directly edit the details of an employee's job through the **Edit job** option available in the profile page dropdown menu.



The Edit job dialog

To edit an employee's job:

1. From the left sidebar, select **Org Chart**.
2. In the org chart, select the employee whose profile you wish to view and edit.
3. In the information panel, select **View profile**.
4. From the employee profile page, from the menu in the top right corner, select **Edit job**.

5. In the **Edit job** dialog, edit the following job details as needed:
    - **Structure** - General information about the role including its title, department, and location.
    - **Compensation** - Compensation information about the role including salary and bonuses.
    - **Recruiting** - Recruiting information about the role, including its hiring status and start date.
    - **Description** - A job description for the role.
6. Select **Save to primary** when you're done.

Edit person

You can directly overwrite the personal data of employees in your Org using the **Edit person** option available in the profile page drop-down menu.

To edit an employee's profile content:

1. From the left side bar, select **Org Chart**.
2. In the org chart, select the node of the employee whose profile you wish to view and edit.
3. In the information panel, select **View profile**.
4. From the employee's profile page, select the down arrow drop-down menu. Select **Edit person.**
5. Edit the information using the fields in the **Edit person** dialog. You'll have the option to edit information under the **Basic info** and **Custom fields** tabs.
    - **Basic info** - Includes general information such as names, birthdate, email, phone number, etc. Learn more.
    - **Custom fields** - Includes information specified by the requirements set in pre-made custom fields. Learn more.
6. Select **Save** when you're finished.

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

Roles: Owner | Technical Owner

5.1.5. Common data troubleshooting for Admins

Below is a collection of common troubleshooting steps for Admins:

Missing data on a datasheet or dashboard

There are a few reasons why data may not be showing up for you on a datasheet or dashboard.

1. You may not have access to the data.
    1. **Suggested next step:** Check your user access role and the field access level. If you are in the **Owner** role at the organization, you will have access to all data. If you are in another access role or are unsure then you likely don't have access to the data.
2. The data may not exist.
    1. **Suggested next step:** Check with an **Owner** to see if data exists.
3. The data sheet or dashboard may be owned by someone who has left the organization.
    1. **Suggested next step:** If you are an **Owner**, then you can click on the share menu and reassign the owner of the data sheet or dashboard to yourself.

A field is not showing up in a field dropdown

1. Check to see if the field is **Hidden** by going to the **Fields** page and filtering by **Status**.
2. Ensure the field existis by searching for it on the **Fields** page.

5.2. Managing groups

You can use the Groups feature to categorize employees into their respective departments, teams, locations, and more. Groups can either be created individually from the Groups page, or created in bulk via spreadsheet import. **Learn more**.

Once you've created your groups such as departments and teams, you can filter ChartHop pages by these groups and use them in advanced queries to refine dashboards, permissions and so on.

Built-in Groups can be broken down in the following categories:

- Departments
- Teams
- Locations

In addition, you can create Custom group types (currently in Alpha).

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

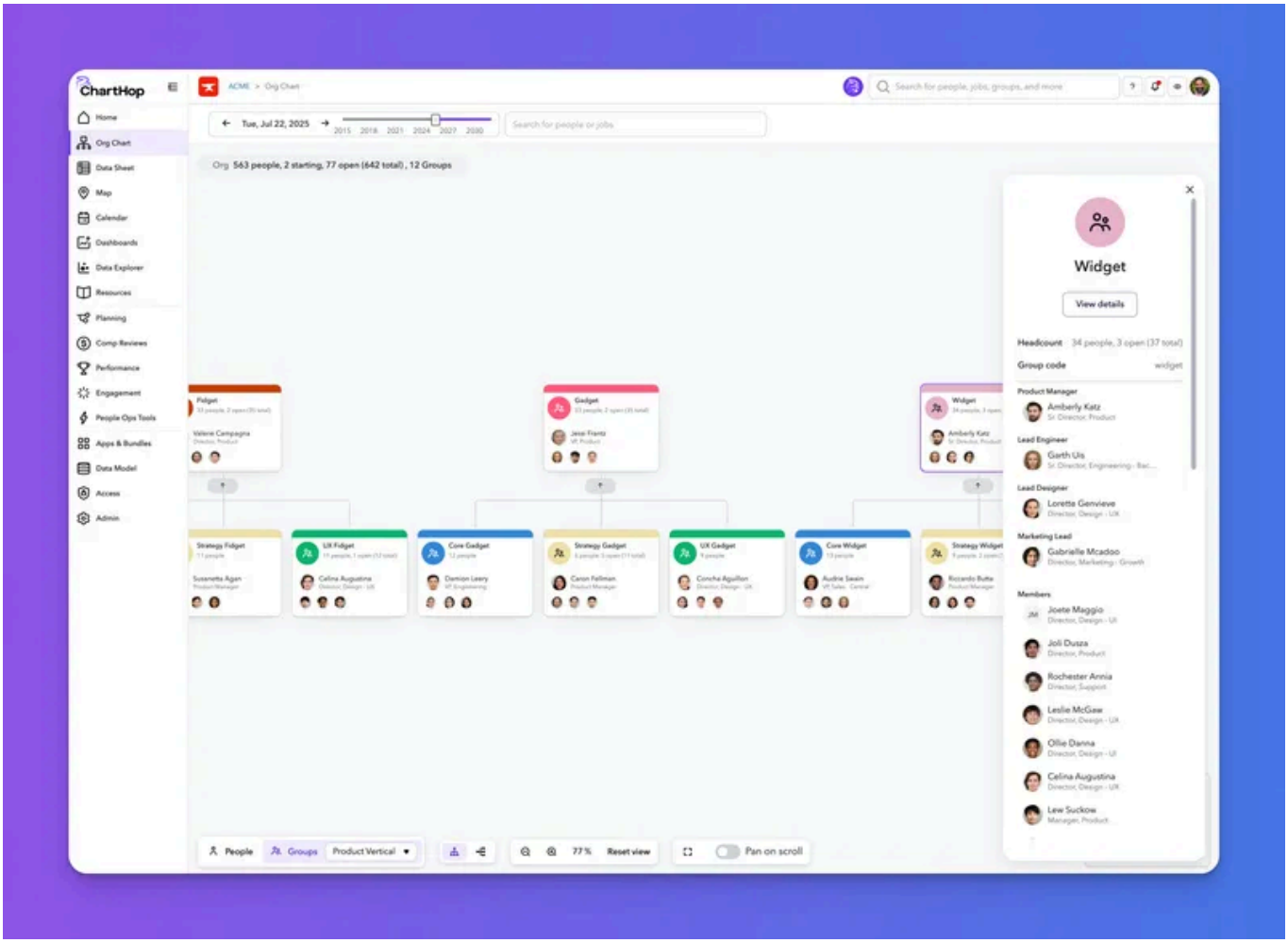
> **Roles**: Technical owner | Owner | Org editor

5.2.1. Custom Groups

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.



Custom Group view in Org Chart

Custom Groups is a feature which allows you to create different **Group Types** and **Groups** within them, including setting up a hierarchy to display on the **Group Org Chart**. **Custom**

Groups can also be referred to as **Matrix Teams** in ChartHop marketing and promotion materials.

Matrix Teams capabilities in ChartHop are full of features to help you manage, understand, and plan your teams over time - giving you and everyone in your org easy-to-understand views of how you work. These features include:

- **Define as many groups as needed.** No one-size-fits-all. Create whatever teams, squads, pods, or groups make sense for your org.
- **Create different structures for different needs.** Some groups are flat (like ERGs), others are structured (like a Product Line with nested Pods).
- **Visualize like an org chart — but different.** Instead of reporting lines, see who's a part of each group, how those groups connect and roll up in your org, and if groups are lacking critical membership or positions.
- **Create custom positions/roles within each group.** For example, ERGs might need to have Lead, Co-lead, and Executive Sponsor positions, while Product Pods might need to have Lead PM, Lead Designer, Lead Developer, Lead Support, and Lead Marketer.
- **Leverage granular access controls.** Set who can see and who can modify each group.
- **Share with teams.** You can now share **Resources**, **Dashboards**, **Data Sheets**, and more by choosing the team itself — not just individuals.
- **Track membership history over time.** ChartHop tracks when someone joined or left a group, or when groups started or came to a close — critical for context and institutional memory.
- **Full analytics support.** Use Matrix Teams in Dashboards — whether as dimensions ("headcount by Product Pod") or filters ("sales by Regional Team").
- **ChartHop AI understands your teams immediately.** As soon as a team is created, AI can incorporate it into insights, org analysis, and more.

The following pages will walk you through setting up new Group Types, the Groups within them, and controlling visibility of each Group Type.

1. **Creating Group Types**: How to create a new Group Type and its associated Positions.
2. **Creating Groups**: How to create Groups within a Group Type

3. **Visibility of Groups**: How sharing and visibility works for Groups

5.2.1.1. Creating a new Group Type

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

Overview

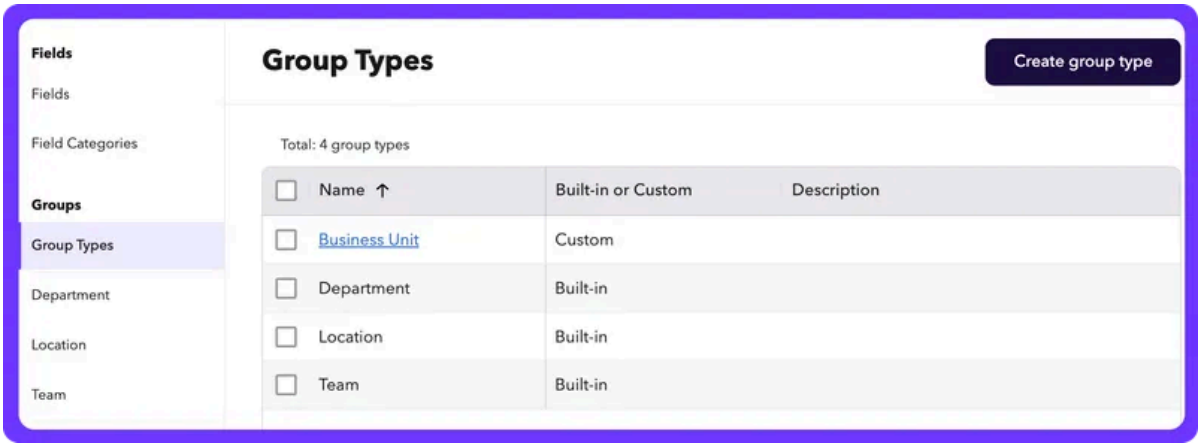
Your organization is organized by more than just departments and location, and you can now reflect that in ChartHop! Once "Custom group types" are enabled in Labs, you will be able to create custom groups under Data model → Groups → Group types. Group types can have "Groups" within them with a hierarchy. This page will walk you through creating Group types.

Group types within ChartHop allow you to fully customize many different ways of seeing your organization. Each Group Type you enable can have its own org chart view. And every org is different, so how you set up your org to reflect how you really operate is up to you.

Here are some examples:

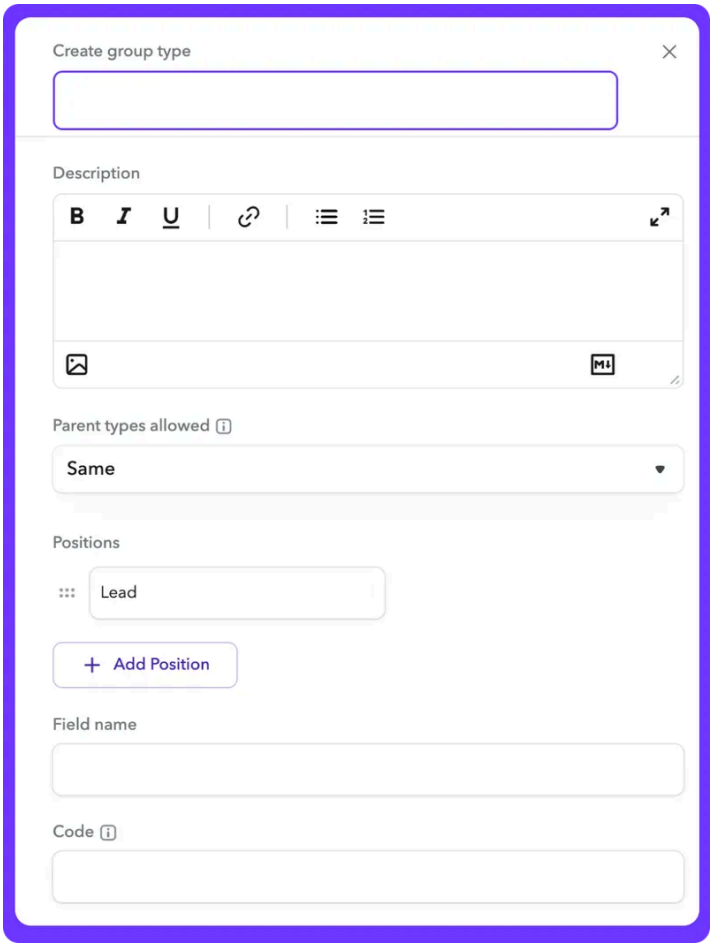
- A software company may have a few different group types:
  - Reflecting how their Research & Development teams are organized around different product scopes
  - Continuously updating Project Groups their R&D teams are working on
  - Showing all of their Employee Resource Groups and who is a member of each of them
- A national brick & mortar chain may want:
  - All of their store locations in a regional hierarchy
  - Those stores rolling up to different corporate regional offices on the org chart

- A fast growing finance company may have acquired a number of companies in their growth:
    - Group types can easily organize those companies without disrupting current organizational hierarchies
    - HR admin can leverage group types to easily assign calendars and permissions



Creating a group type

Clicking "Create group type" opens a sidebar where you can customize your group.



Description: This is visible just in the sidebar and the list table.

Parent types allowed: A group type can have a hierarchy within it, or not, which reflects how the groups are seen on the Groups Org Chart. This setting allows you to set which other group types can be a part of that hierarchy.

- Same: Groups of this group type can only have a parent group of the same type
    - ex: Research & Development groups get broader in scope as you move up the hierarchy, so these groups are parents of other R&D groups.
- Both: Groups of this group type can have a parent group of the same type or one other (must specify which)
    - ex. Setting up Teams in your org with Department as an option as well so that Teams can roll up to each other and ultimately to a Department.
- Other: Groups of this group type can only have a parent group that is not the same type (must specify which)
    - ex. Regional Stores must roll up to corporate Regional Offices, which are two different group types you've set up.
- None: Cannot have a hierarchy or any parent groups
    - ex. Employee Resource Groups at your organization are independent with no traditional org chart hierarchy

Positions: You can create positions within your group types and your groups. For example, a "Product" group type can have the positions of "Senior Product Manager", "Product Manager" and "Junior Product Manager". These will be the positions that are available in any and all groups of that type.

These are fully customizable for your needs.

Code: You are able to customize a code to reference this group in other systems if needed.

Membership Type

The **Membership Type** setting controls whether a person can belong to more than one group of this type at the same time.

- **Multiple** *(default)*: A person can belong to more than one group within this group type simultaneously. When a new group is assigned, it is added on top of any existing memberships — values append rather than replace.

- **Single**: A person can only belong to one group within this group type at a time. Assigning a new group will automatically remove their previous membership.

> If you're seeing group values stack instead of replace, switching **Membership Type** to **Single** is the fix.

Changing Membership Type on an existing group type

If you change an existing group type from **Multiple** to **Single**, ChartHop will automatically migrate all existing group memberships for that group type — ensuring that historical data follows the "one group per person" rule. No manual cleanup is needed.

Changing from **Single** to **Multiple** requires no migration, since allowing more memberships is always additive.

5.2.1.2. Creating Groups

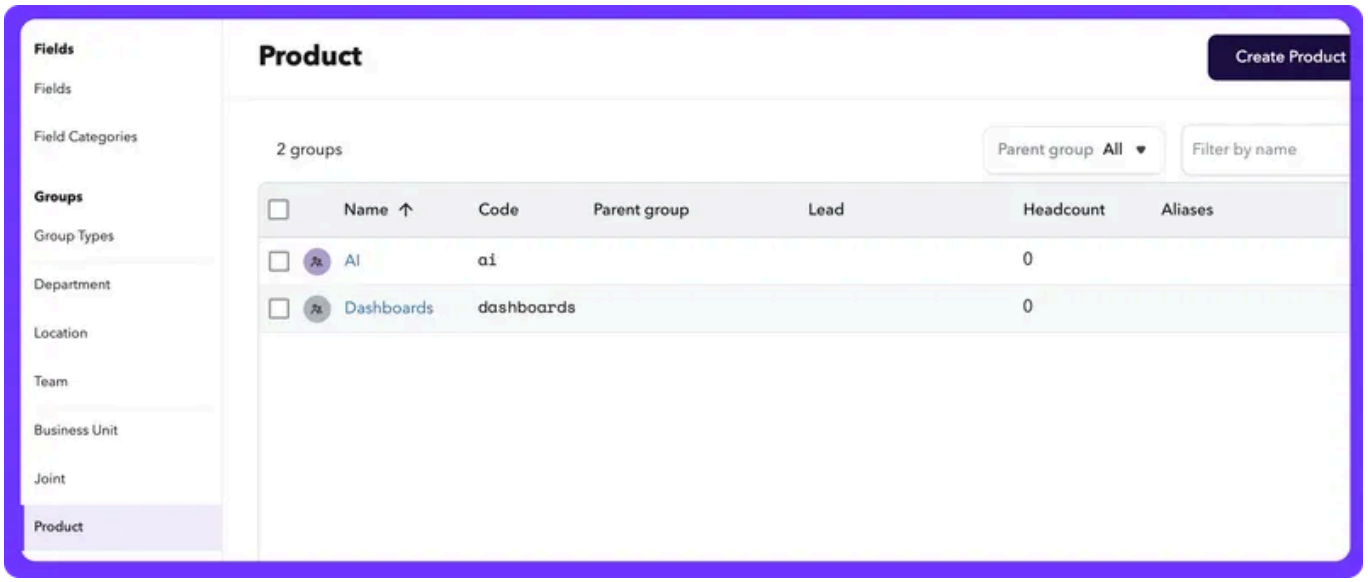
This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Overview

Groups can be created within a group type. This allows you to further customize how your company is organized.



Creating a group

You can add groups by selecting the group type and clicking "Create [group name]". In the example below, our Product group type has 2 groups within it for our current projects- AI and Dashboards.

Description: This is visible in the groups table, and in the group details where you manage membership.

Parent Group: You can nest groups underneath other groups in a group type.

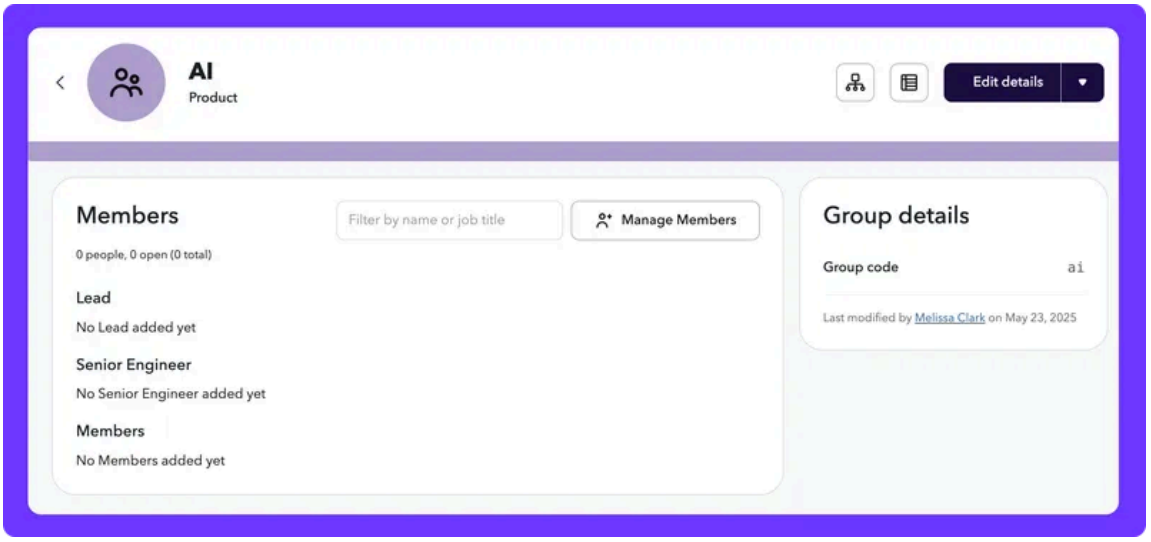
Start date: The date at which this group will be visible in ChartHop (for example, on the org chart).

Color: The color you choose will be used in the org chart display

Code and Alias: These are optional, and can be used to sync data from other systems.

Assigning members

Once a group is created, clicking the name of the group will open up the group details page.



Group details

The positions available are created in the group type. Learn more about creating group types here: **Creating a new Group Type**

1. Click "Manage Members"
2. Choose the person that should fit the roles you want to fill. You can also add additional members until your team is full.

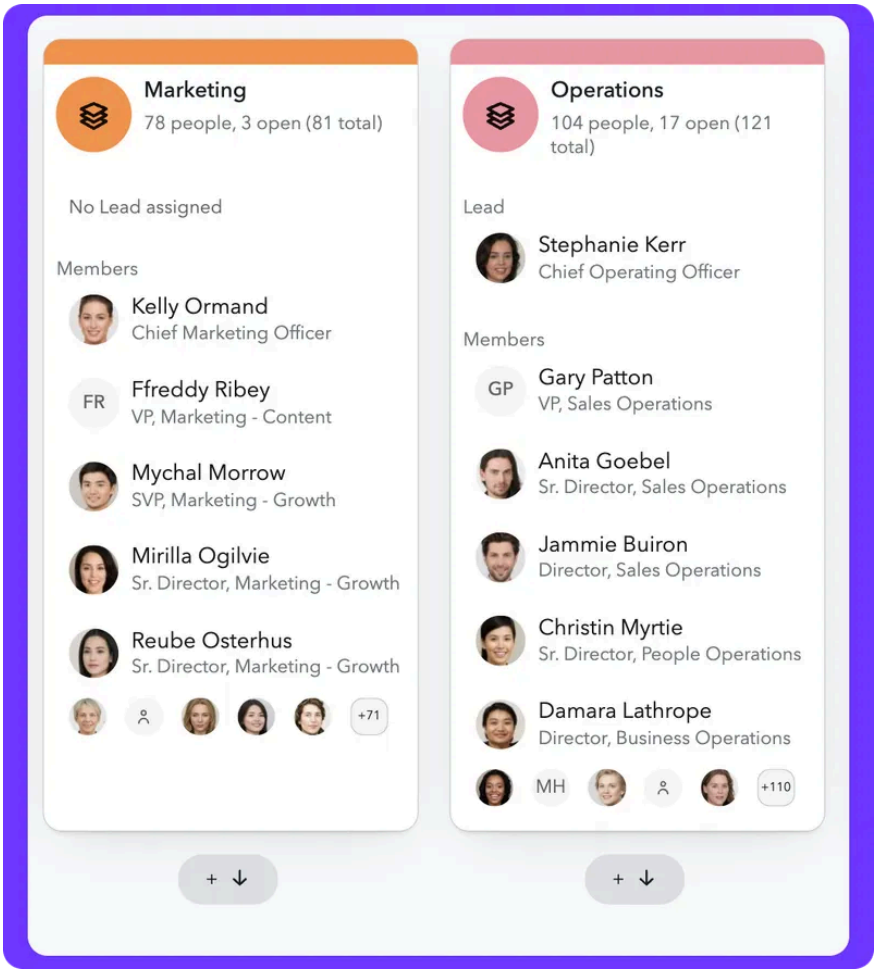
Editing group details

From the Group details page, you can click "Edit details" if you want to change the name, description, parent groups, start date or color.

What can I do with groups?

A lot! You can leverage ChartHop's org charts, dashboards, datasheet, and scenarios to maximize visibility and functionality of your company's groups.

- People ops managers may group employees by product line so they can quickly understand how each product area is staffed and where there may be gaps.
- Executive teams may want to filter dashboards and analytics by acquisition group so they can compare engagement, attrition, or compensation trends across legacy and acquired teams.
- New hires may want to see org charts grouped by business unit (e.g., retail vs. enterprise) to better understand reporting lines and resourcing.
- IT directors may want to assign access to specific tools or dashboards based on group membership (e.g., “All employees in the ACME acquisition”) to manage data security.



Example of groups in an org chart

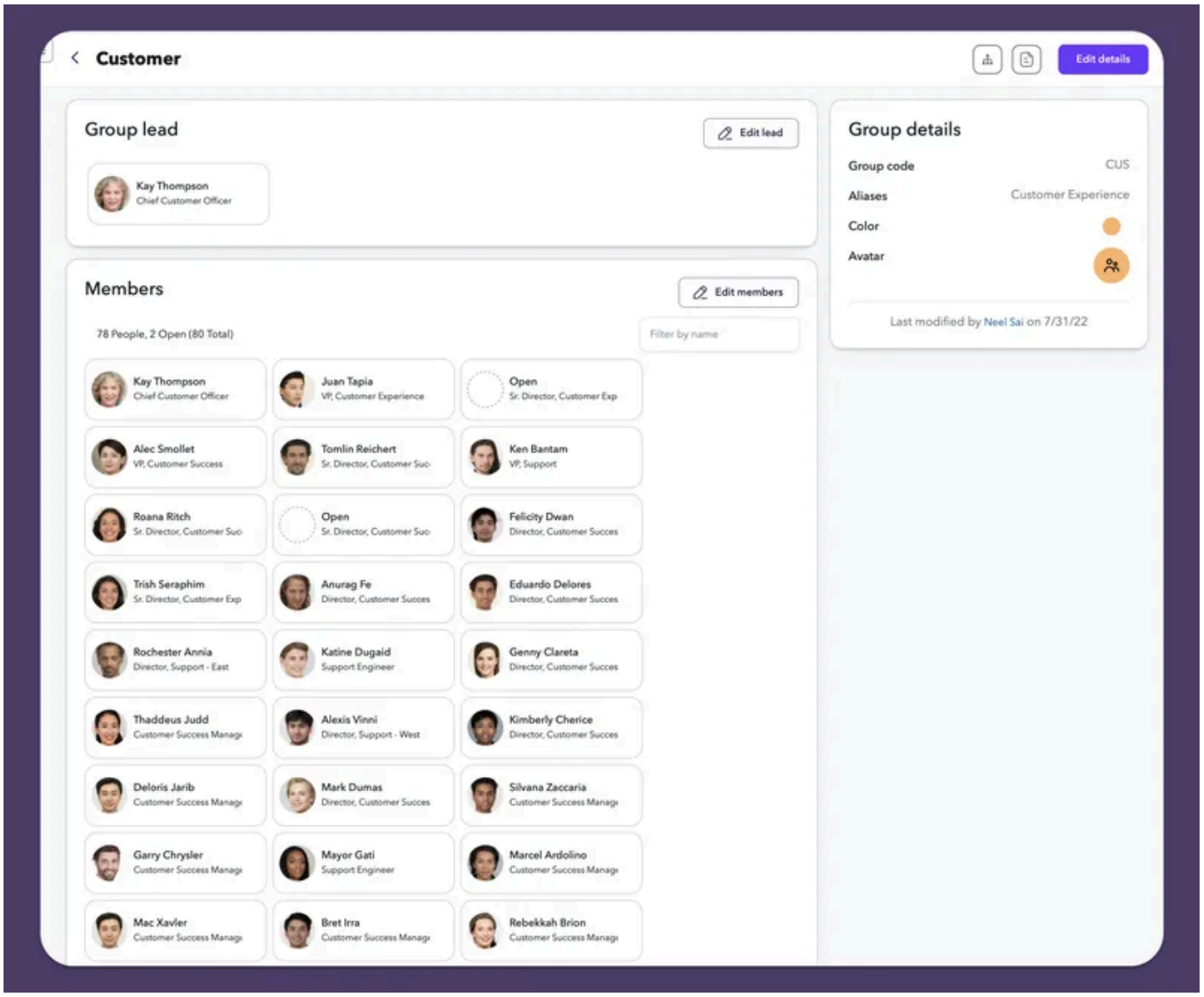
5.2.2. Group details

You can use the **Group details** page to add and remove members, view subgroups, and make other general high-level changes to your groups in your ChartHop organization.

Accessing the Group details page

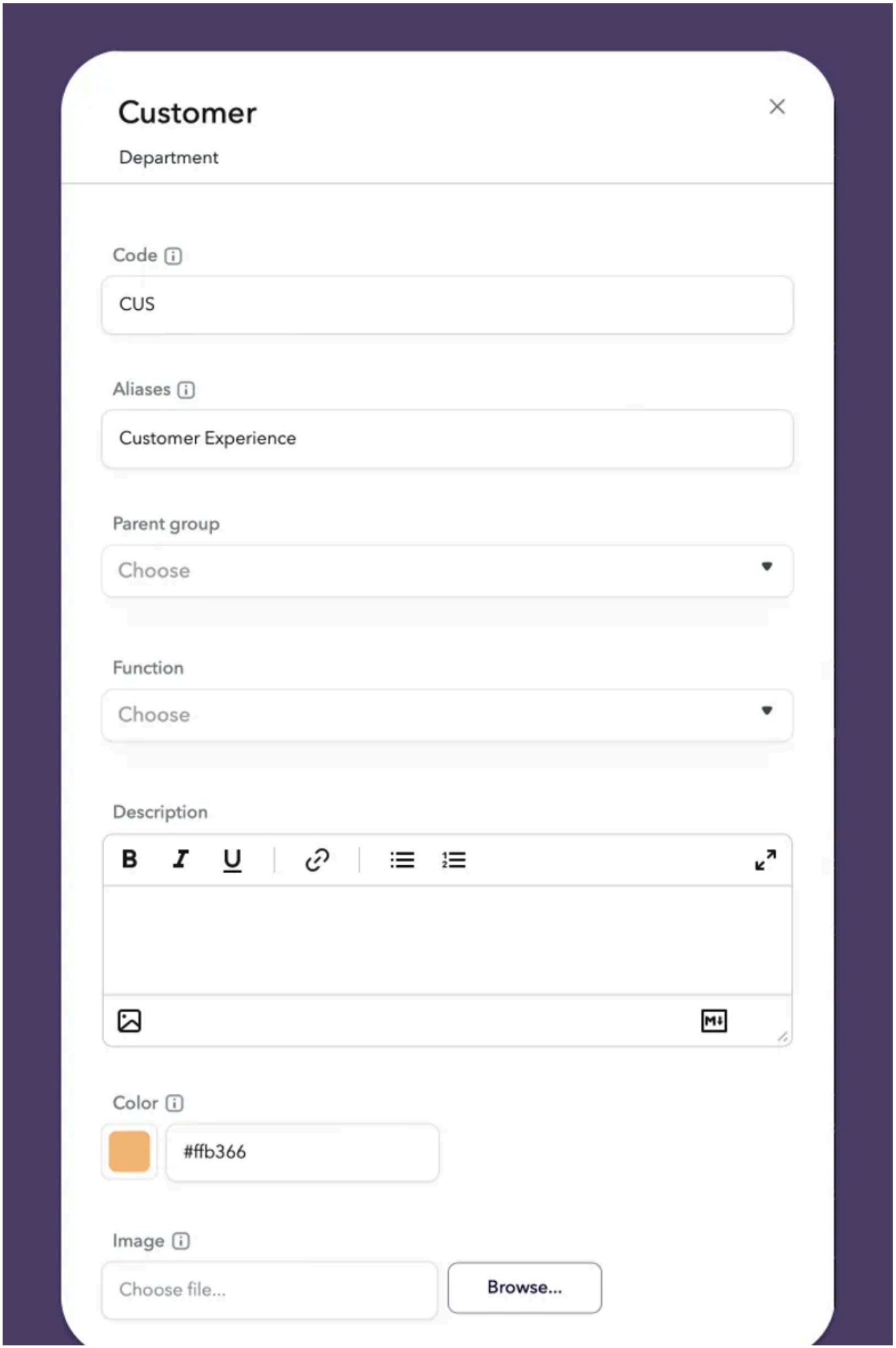
Each group has its own Group details page. To access the Group details page for a specific group:

1. From the left sidebar, select **Data Model**.
2. From the sub-menu, select **Departments**, **Teams**, **Locations** or one of your **Custom Groups**.
3. Choose the group you want to edit by selecting its name under the **Name** column in the groups list.
4.



Customizing groups

To customize your groups, you can assign them a specific color or image along with a description.


Customer
Department
Code
CUS
Aliases
Customer Experience
Parent group
Choose
Function
Choose
Description
Color
#ffb366
Image
Choose file...
Browse...



To edit a Group:

1. From the **Group details** page, select the **Edit details** button in the upper right.

To add or edit a description:

1. In the right side panel, scroll down to the **Description** section.
2. Add or edit your description in the **Description** dialog box.
3. Select **Save** when you're done.

To assign a color:

1. In the right side panel, scroll down to the **Color** section.
2. Under **Color**, use the palette tool to select a color to be assigned to your group.
3. Select **Save** when you're done.

To assign an Image:

1. In the right side panel, scroll down to the **Image** section.
2. Select **browse** and assign an image from your computer.
3. Select **Save** when you're done.

> Applying an image to your group overrides its color assignment.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.3. Group names and aliases

Groups are how you identify groupings or divisions of your organization. For example, you create a group to represent a department.

Group names

You can use a group name to uniquely identify a department, team, or location. Group names are unique identifiers and may only be used once in your organization.

Group aliases

You can use group aliases to consolidate multiple group names into a single group. When group names change such as a department being renamed, you can create an alias for a group that encompasses the old names and still lets you maintain historical data.

Group aliases are also helpful to help you consolidate different department names used in your payroll system. For example, your payroll system may use "customer success", "CS", and "customer service" to refer to the same department. With ChartHop, you can set up a group alias that combines these group names into a single department. For example, you can create a department called Customer Sucess and add two aliases to that department. In this case, a person or job that is assigned to "CS" or "customer service" in your payroll system will be a part of the "customer success" department in ChartHop. This helps you eliminate "extra" groups in your org chart without needing to update your payroll system.

New Department

Department

Code

Aliases

Parent group

Choose

Function

Choose

Description

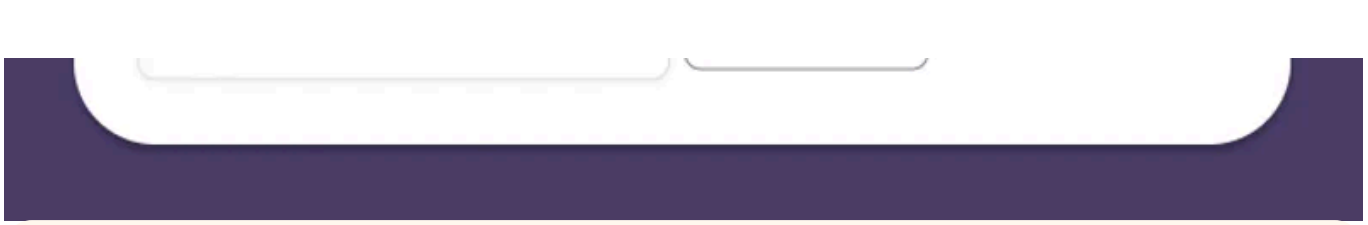
Color

#3DCC91

Image

Choose file...

Browse...



If you use a term as an alias, you cannot also use it as a group name.

Differences between Parent groups and aliases

Parent groups are specifically used to organize child groups according to your organization's structure in ChartHop. Aliases, however, are best used as tie-ins to the department names used in your payroll system and ATS.

For example, in your payroll system, you could have a department named "Support", while in ChartHop that same department could be referred as "Customer Support".

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.2.4. Departments

A Department is a type of group for a collection of employees who perform interrelated tasks. Departments are intended to serve as the highest level group structure in your organization.

This section covers:

- Creating a department
- Editing a department

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.4.1. Creating departments

> **Roles**: Technical owner | Org editor

You can create departments to fully capture the structure of your ChartHop organization.

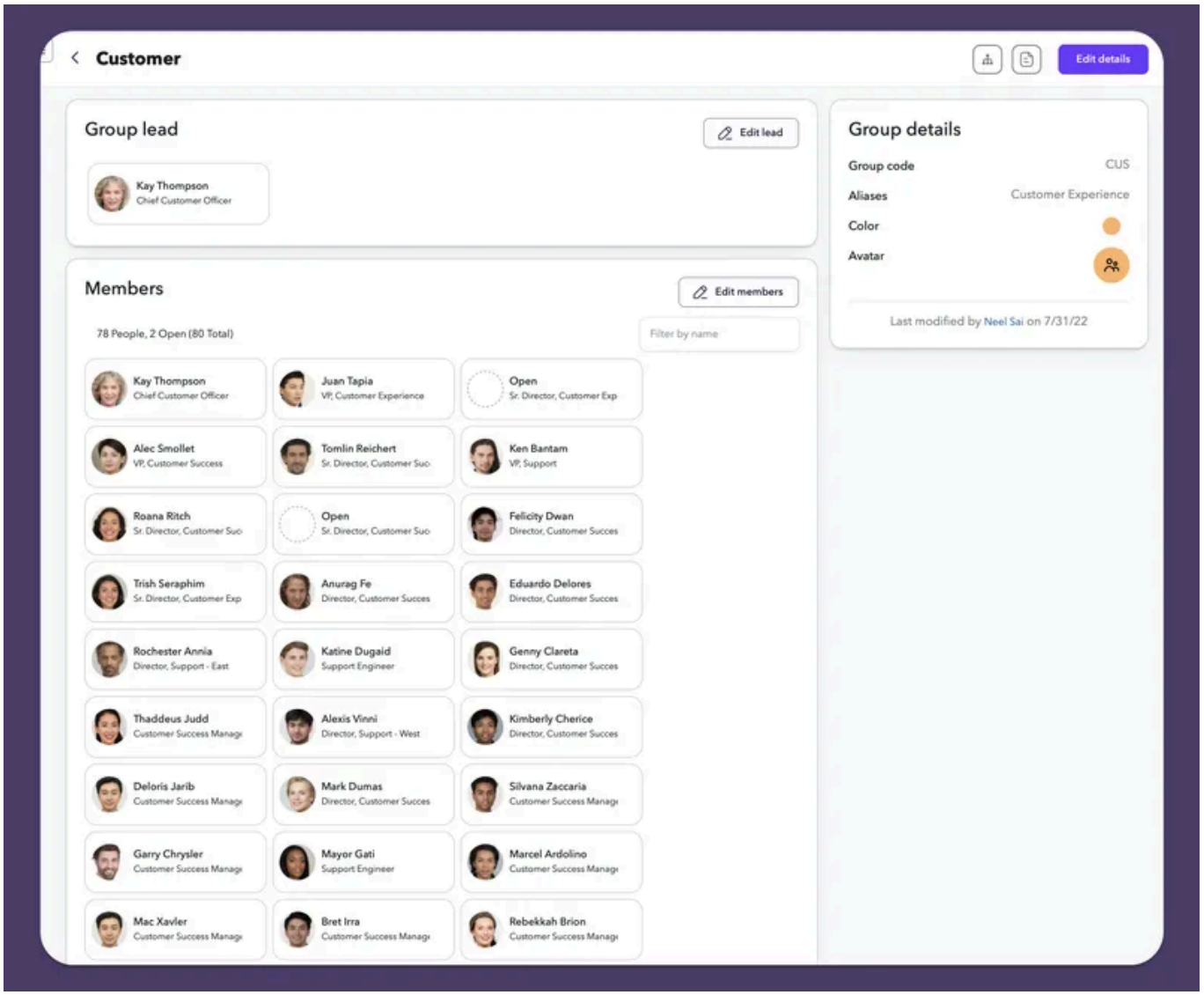
To create a department:

1. From the left sidebar, select **Data Model**.
2. From the sub-menu, select **Departments**.
3. Select **Create department** from the upper right of the Departments page.
4. From the **New Department** right side panel, configure your department using the following settings:
    - **Department name:** The name of the department.
    - **Department code:** A short code or code number used to uniquely identify the department in other systems.
    - **Aliases:** An alternative name that can be used for the group when syncing with remote systems. **Learn more**.
    - **Color:** The color that will be applied in the org chart to the group's members.
    - **Image:** An image shown on the group's profile page.
    - **Parent group:** The group that this group is a child under.
    - **Function:** The designated business function assigned to the group.
        - Functions are fixed categories and cannot be customized.
5. Select **Save** when you're done.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.4.2. Editing departments

As a user, you may want to rename a department or change its location in the org.

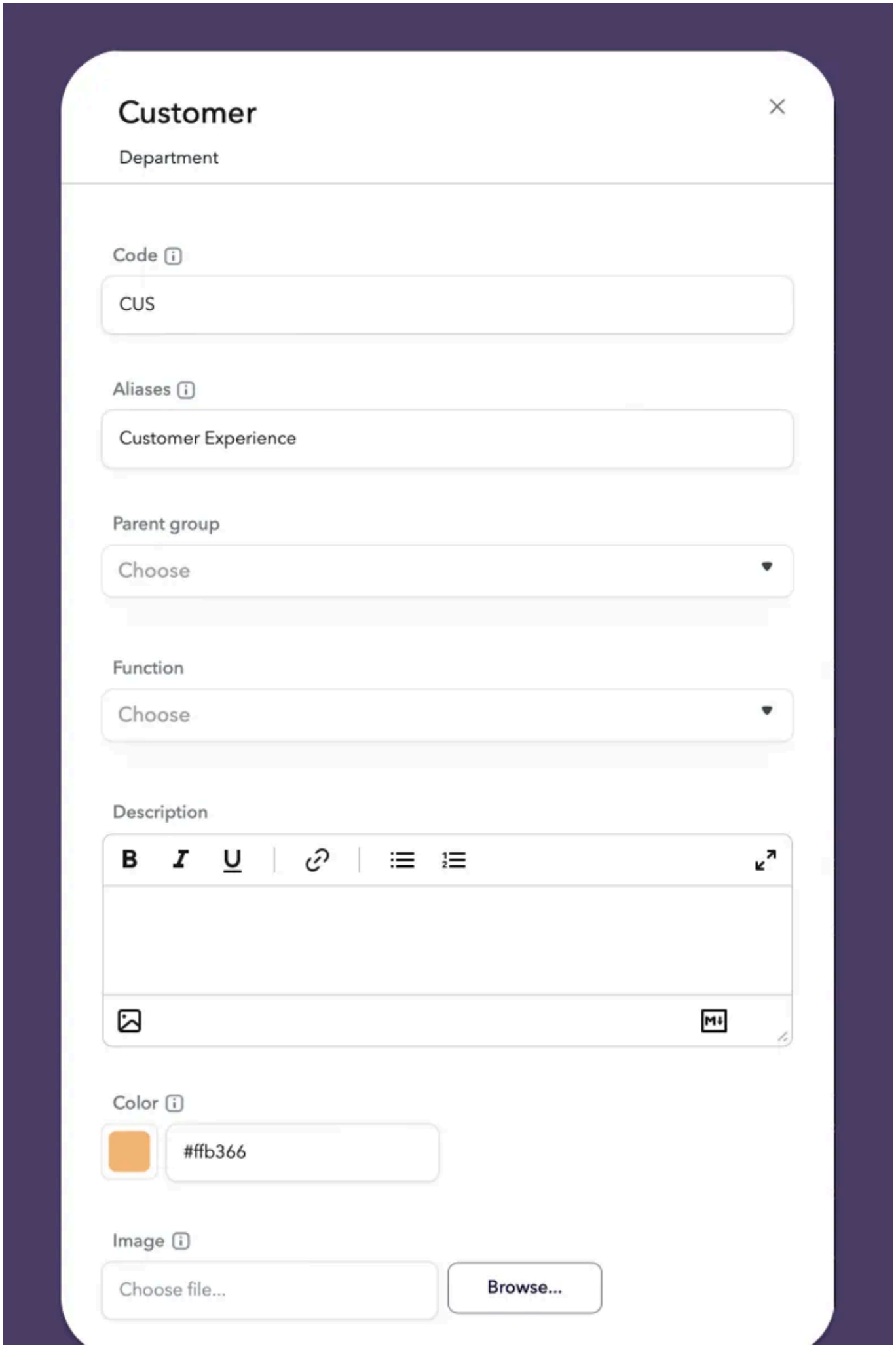


View Department details

1. From the left sidebar, select **Data Model**.
2. From the sub-menu, select **Departments**.
3. Choose the **Department** you want to edit by selecting its name under the **Name** column in the groups list.

Edit Department details

1. In the upper right of the Department details view, select the **Edit details** button.


Customer
Department
Code
CUS
Aliases
Customer Experience
Parent group
Choose
Function
Choose
Description
Color
#ffb366
Image
Choose file...
Browse...



To add or edit a description:

1. In the right side panel, scroll down to the **Description** section.
2. Add or edit your description in the **Description** dialog box.
3. Select **Save** when you're done.

To assign a color:

1. In the right side panel, scroll down to the **Color** section.
2. Under **Color**, use the palette tool to select a color to be assigned to your group.
3. Select **Save** when you're done.

To assign an Image:

1. In the right side panel, scroll down to the **Image** section.
2. Select **browse** and assign an image from your computer.
3. Select **Save** when you're done.

Adding and removing Department lead

You can manage the members in your groups by using the add/remove member feature.

To select a lead for a Group:

1. From the **Group details** page, select the **Edit lead** button located to the upper right of the Group lead section.
2. Select the desired lead from the dropdown.
3. Select **Save changes** when you're done**.**

Adding and removing Members

You can manage the members in your groups by using the add/remove member feature.

To add members to your group:

1. From the **Group details** page, select the **Edit members** button located to the upper right of the member cards.

2. Select the **Add member** dropdown and select the employee you want to add from the list.
3. Select **Save changes** when you're done**.**

To remove members from your group:

1. From the **Group details** page, select the **Edit members** button located to the upper right of the member cards.
2. Scroll down to the member(s) you wish to remove and select the **X** button adjacent to their profile bubble.
3. Select **Save changes** when you're done.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Technical owner | Org editor

5.2.5. Teams

A *team* is a smaller collection of employees who perform related tasks. Multiple teams can belong to a single department.

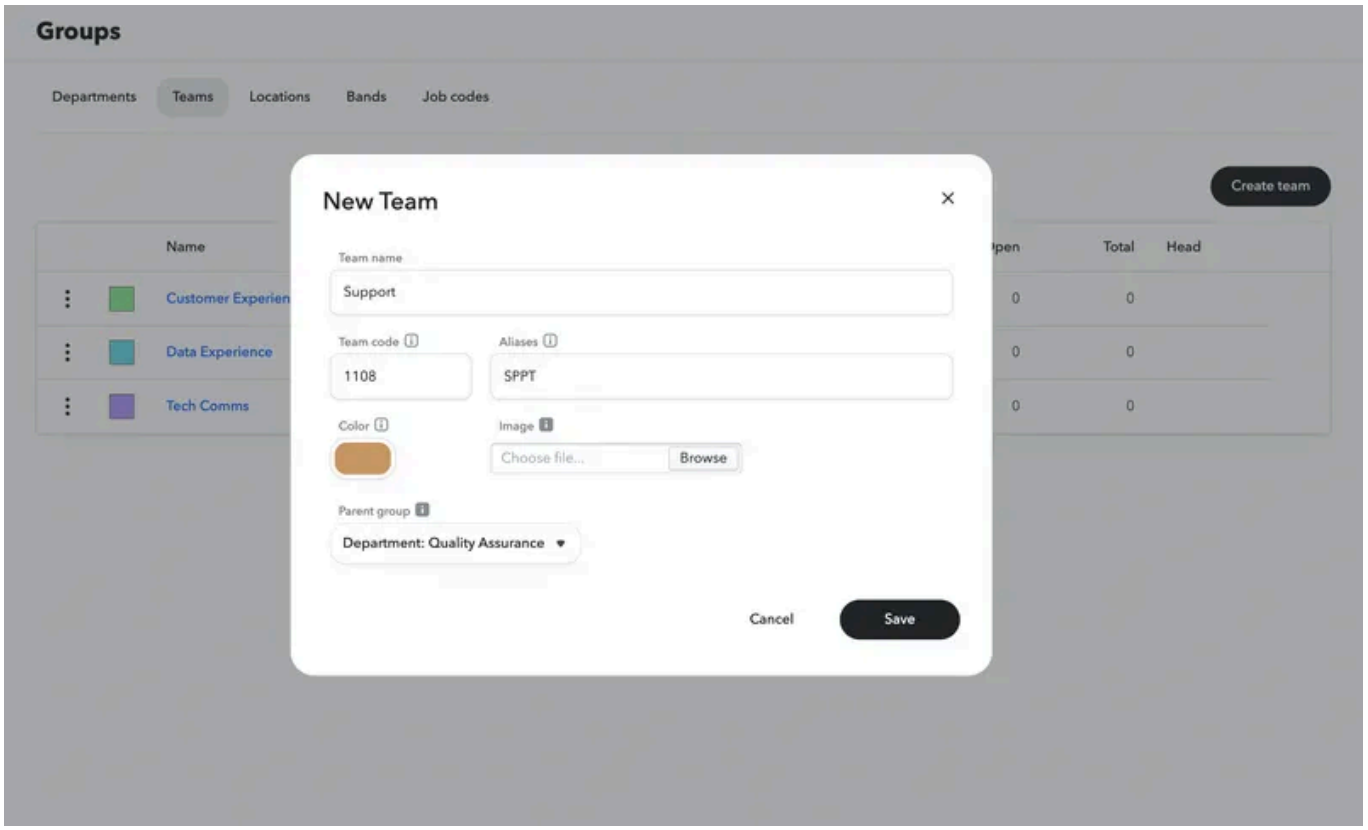
This section covers:

- Creating a team
- Editing a team

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.5.1. Creating teams

To capture the structure of your ChartHop organization, you can create independent teams, or assign multiple teams to a department.



To create a team:

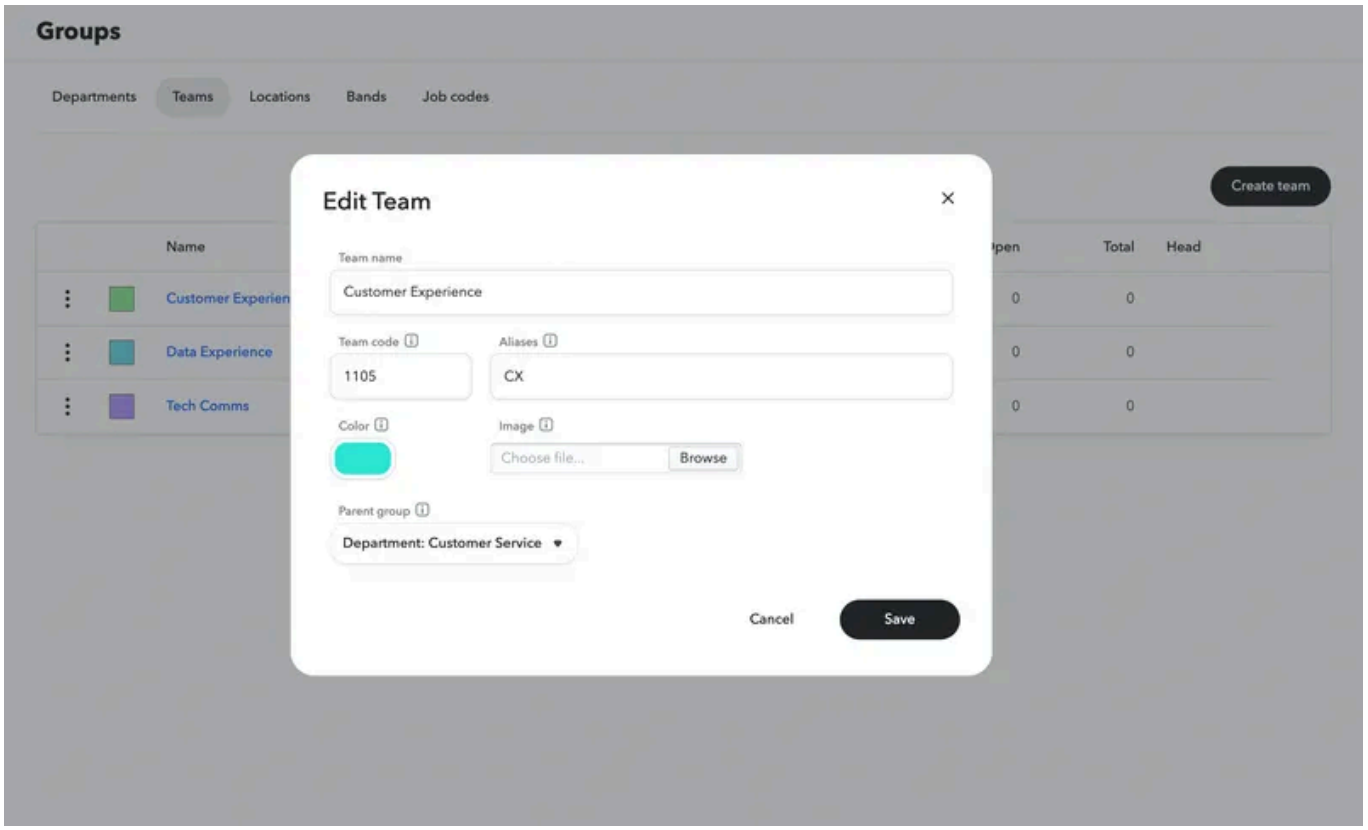
1. From the **Settings** option in the left navigation bar, select **Groups**.
2. Select **Create team** from the the **Teams** tab.
3. From the **New Team** dialog box, configure your team using the following settings:
    - **Team name** - The name of the team.
    - **Team code** - A short code or code number used to uniquely identify the team in other systems.
    - **Aliases** - An alternative name that can be used for the team when syncing with remote systems. Learn more.
    - **Color** - The color that will be applied in the org chart to the team.
    - **Image** - An image shown on the team's profile page.
    - **Parent group** - The group that this group is a child under.

4. Select **Save** when you're done.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.5.2. Editing teams

At times, you may need to update name or other departmental changes in your organization's teams.



To edit a team:

1. From the **Settings** option in the left navigation bar, select **Groups**.
2. From the **Teams** tab, choose the team you wish to edit by selecting it's action menu. Select **Edit**.
3. Select **Save** when you're done.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.6. Locations

You can use locations to track and manage information about the work addresses used in your ChartHop organization.

> Locations are required for ChartHop's Map page. You must ensure that all of your locations contain both a **City** and a **Country**.

Creating locations

Like other Groups in ChartHop, you can create locations individually under the Locations tab in ChartHop, or in bulk using the spreadsheet import tool.

Configuring locations

After importing or creating locations in ChartHop, you can include details such as address information, images, and other unique identifiers.

Field	Description
Location name	The location's name.
Location Code	The shortcode or code number is used to uniquely identify the location in other ATS, equity, or payroll systems.
Aliases	An alternative name that can be used for the location when syncing with remote systems. **Learn more**.
Color	The color used to represent the location.
Image	The image used on the location's profile page.
Location Type	A dropdown for assigning the location as either **Remote** or **Office**. Required in order to display locations on the **Map**. **Learn more**.
City	The location's city. **Required.**
State	The location's state.
Country	The location's country. **Required**.
Postal	The location's postal or zip code.

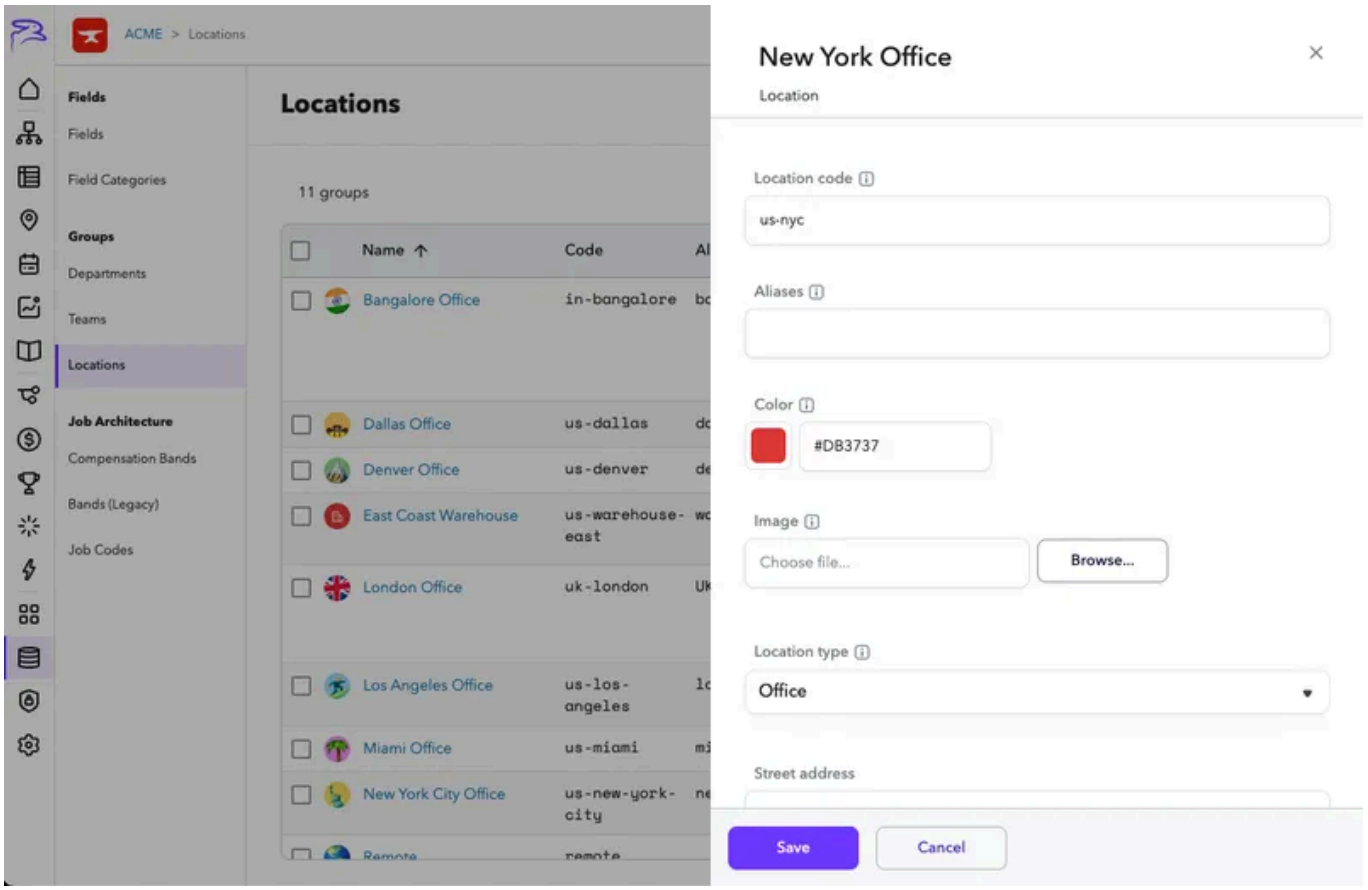
Syncing location data

When you sync location data between your HRIS to ChartHop, make sure you use the exact same location names in both systems. Also, if your HRIS uses numbers or codes for locations, you can add these to ChartHop using **Aliases** so they match.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.6.1. Create a location

You can create locations to capture your physical locations (Offices, stores, warehouses, etc.) within your organization.



To create a location:

1. Select **Data Model** in the left navigation bar, then select **Locations**.
2. Select **Create location**.
3. In the **Create Location** panel, configure your location using the following fields:
    - **Location name** - The location's name.
    - **Location code** - A short code or code number used to uniquely identify the location in other payroll, equity, and ATS systems.
    - **Aliases** - An alternative name that can be used for the location when syncing with remote systems. Learn more.
    - **Color** - The color that will be applied in the org chart to the location.
    - **Image** - The image used on the location's profile page.

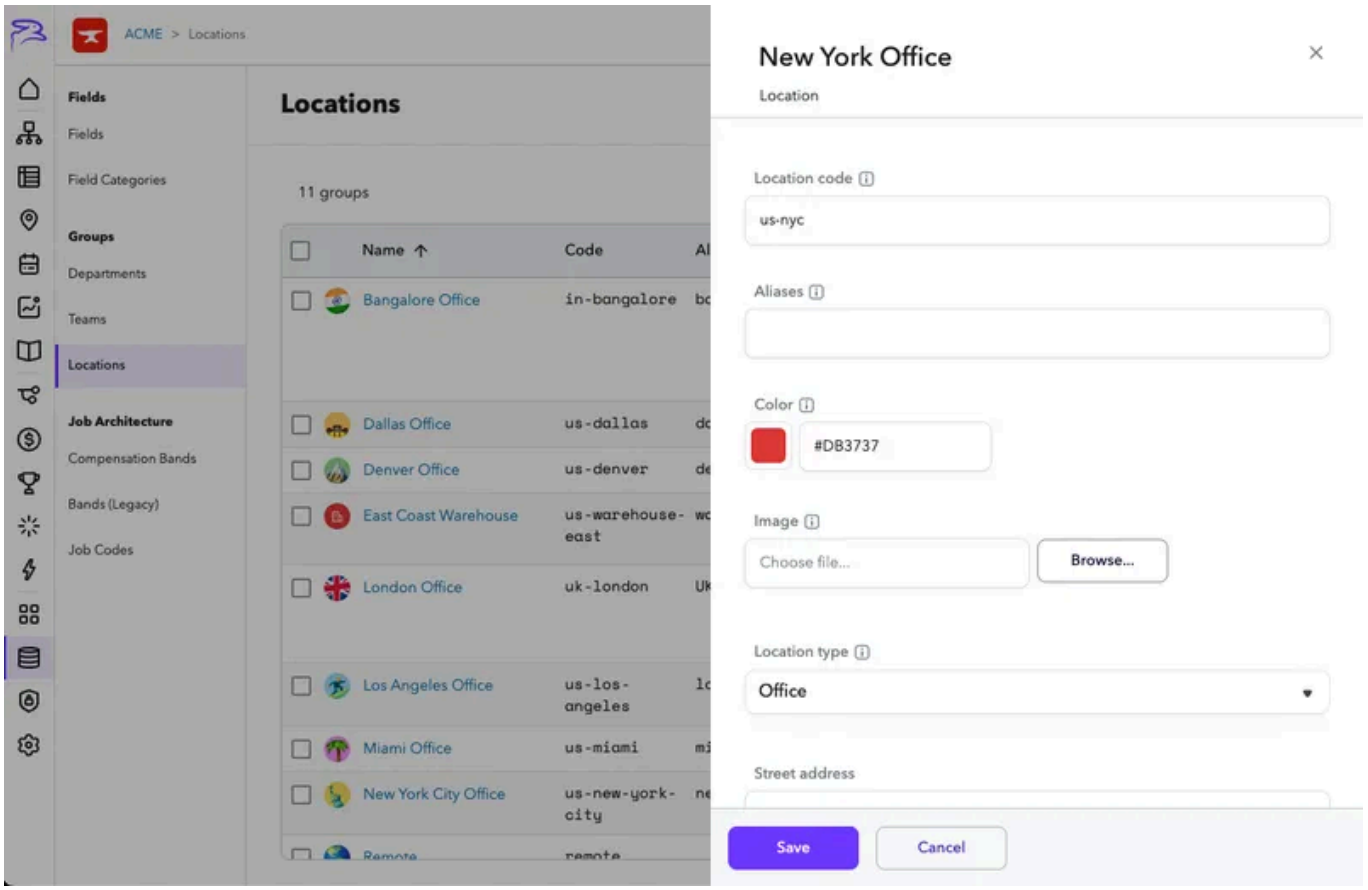
- **Location Type** - A dropdown for assigning the location as either **Remote** or **Office**. Required in order to display locations on the **Map**. Learn more.
  - **Remote** - For non-physical locations. Does not offer the option to include a full street address.
  - **Office** - For physical locations. Offers the option to include a full street address.
- **City** - The location's city.
- **State** - The location's state.
- **Country** - The location's country. Required
- **Postal** - The location's postal or zip code.

4. Select **Save** when you're done.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.6.2. Edit a location

You can make changes to any of your previously created or imported locations by editing them directly in ChartHop.



To edit a location:

1. Select **Data Model** in the left navigation bar, then select **Locations**.
2. Choose the location you wish to edit by selecting the checkbox, then select **Edit**.
3. Select **Save.**

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.7. Bands

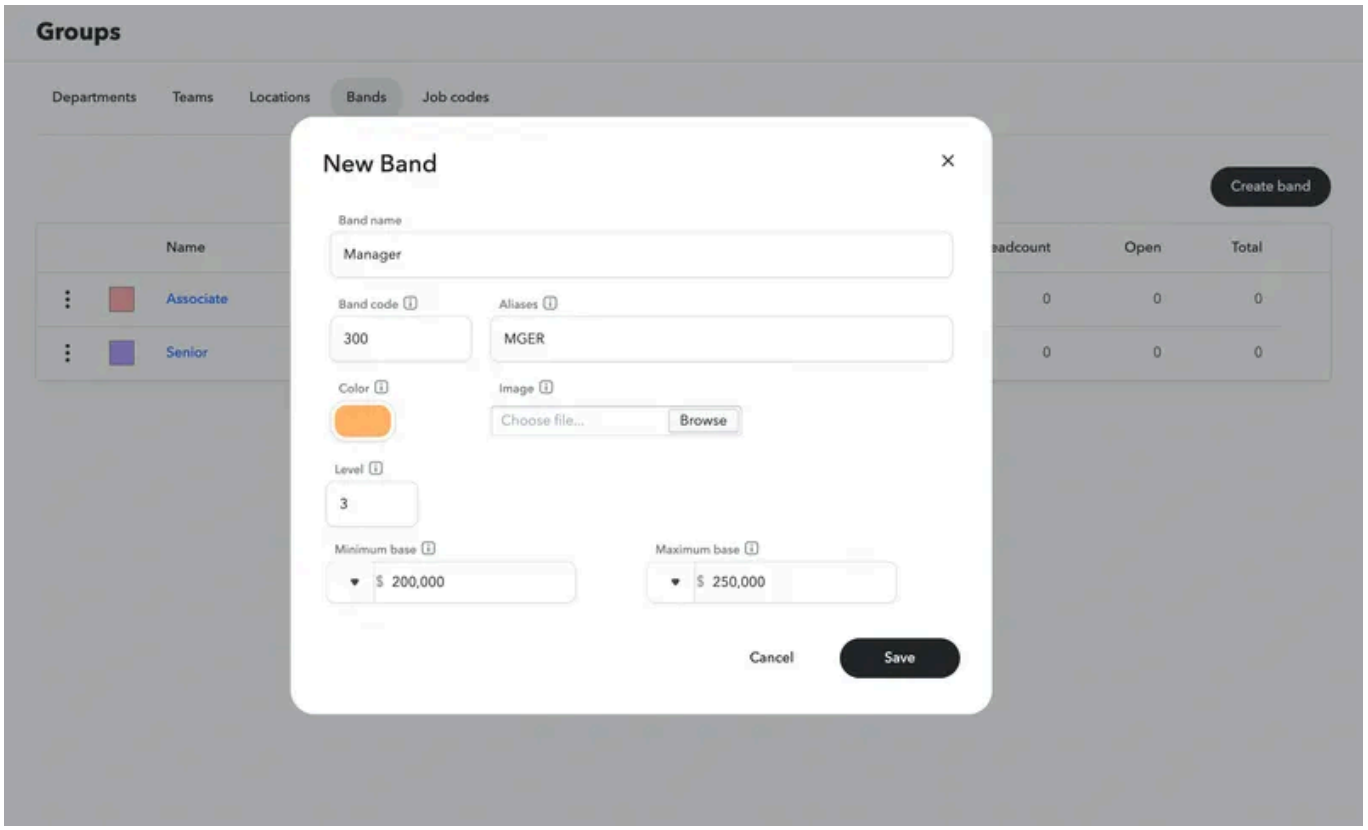
A Band is a compensation level structure that you can use to organize the salary range of individual members in your organization.

> The Compensation bands feature has been updated and the documentation has been moved. **Learn more.**

5.2.7.1. Creating bands

> The Bands feature has been enhanced and moved. You can create and edit compensation bands from the ... (more) menu, and selecting Compensation bands. **Learn more.**

You can create bands to organize the various compensation tiers in your ChartHop organization.



To create a band:

1. From the **Settings** option in the left navigation bar, select **Groups**.
2. Select **Create band** from the the **Bands** tab.
3. From the **New Band** dialog, configure your team using the following settings:
    - **Band name:** The name of your location.
    - **Band code:** A short code or code number used to uniquely identify the band in other systems.

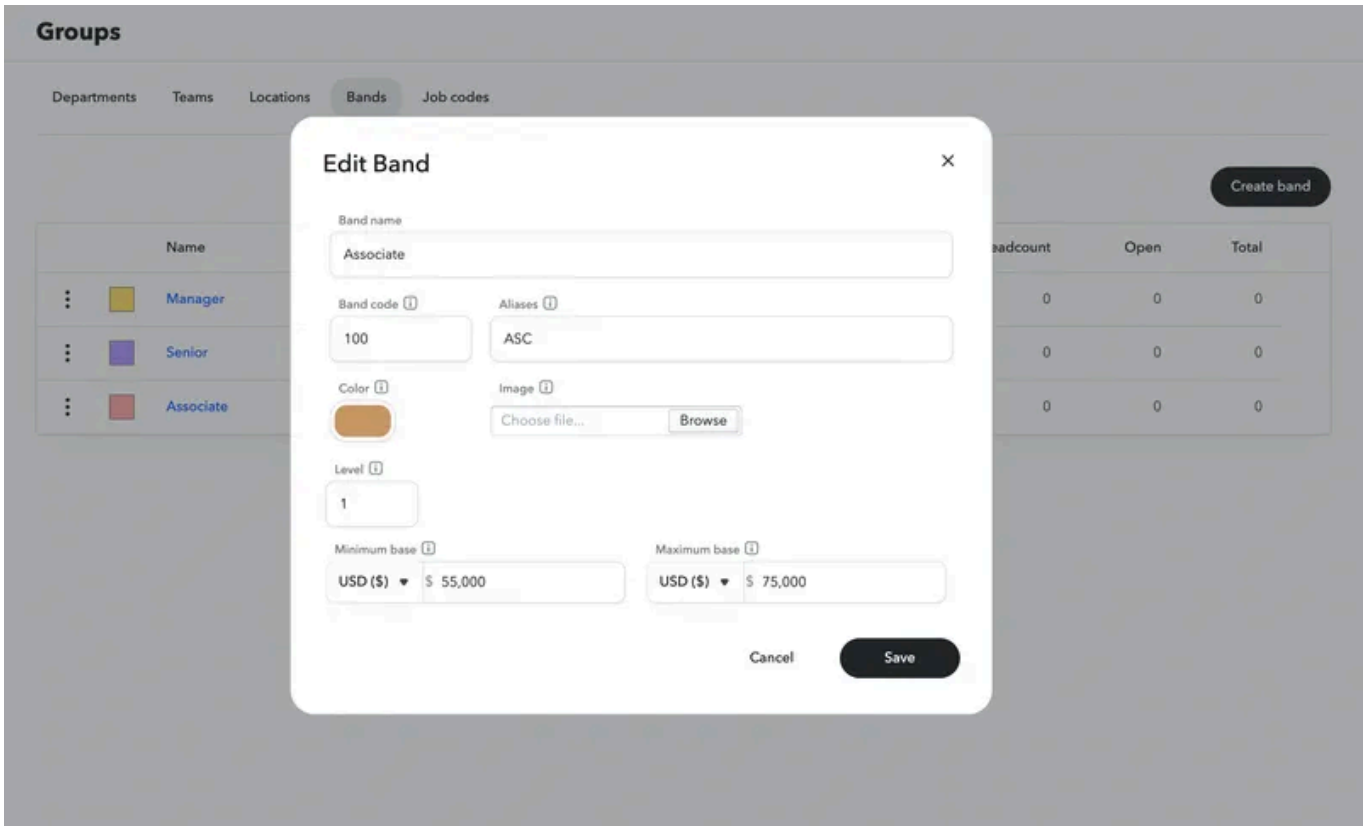
- **Aliases:** An alternative name that can be used for the band when syncing with remote systems. **Learn more**.
- **Color:** The color that will be applied to group members in the org chart.
- **Image:** An image shown on the band's profile page.
- **Level:** A number from 0 to 100 used to represent the vertical level of the band.
- **Minimum Base** : The minimum possible salary assigned to the band.
- **Maximum Base**: The maximum possible salary assigned to the band.

4. Select **Save** when you're done.

5.2.7.2. Editing bands

> The Bands feature has been enhanced and the documentation has been moved. You can now create and edit compensation bands from the ... (more) menu, and selecting Compensation bands. **Learn more.**

As a user, you may want to make changes to your company's compensation structure, or adjust the compensation levels of individual bands.



To edit a band:

1. From the **Settings** option in the left navigation bar, select **Groups**.
2. From the **Bands** tab, choose the band you wish to edit by selecting it's action menu. Select **Edit**.
3. Select **Save** when you're done.

5.2.8. Job codes

A Job code is a unique identifier you can use to label and define general and specific roles in your ChartHop organization.

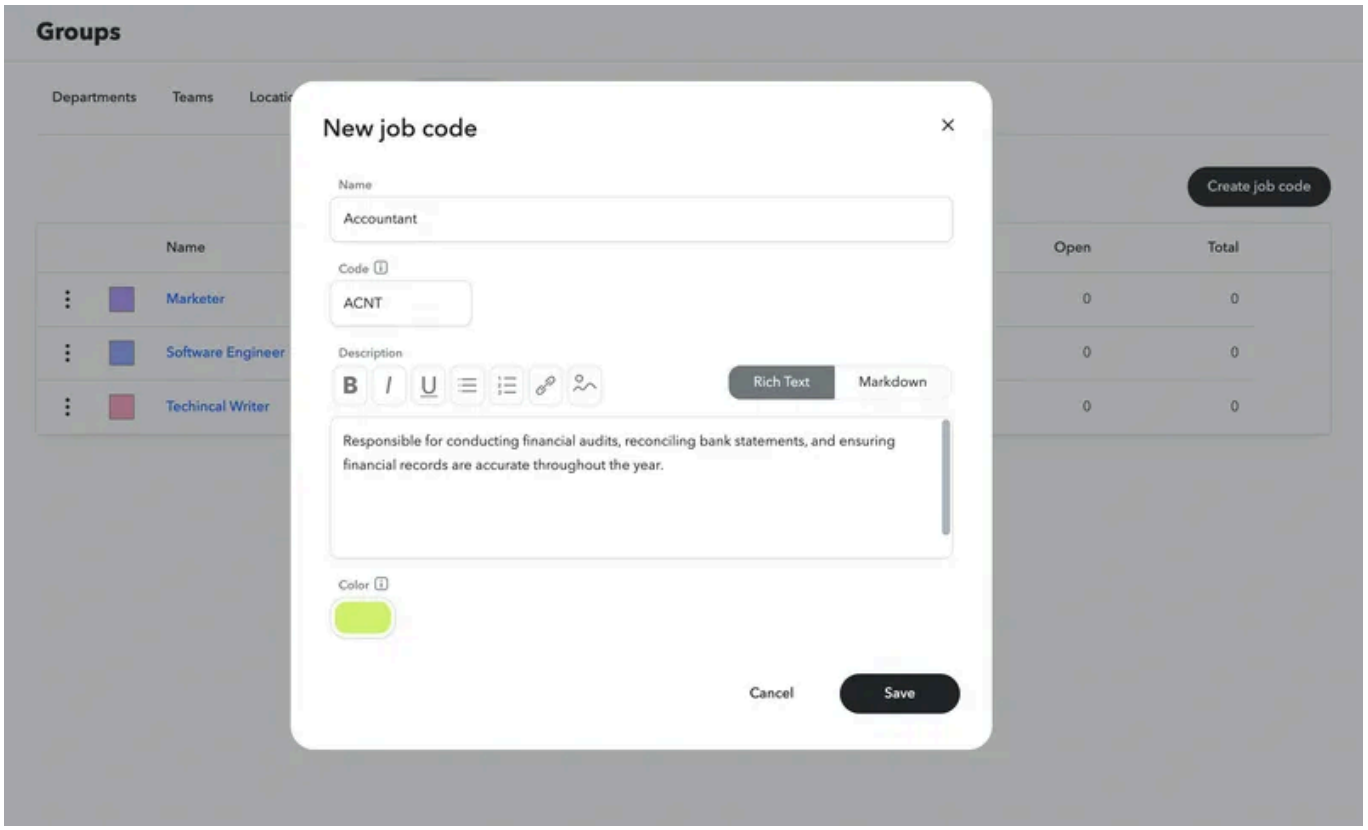
This section covers:

- Creating a job code
- Editing a job code

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.8.1. Creating job codes

You can create job codes to uniquely identify roles in your ChartHop organization while also creating associations to those roles in your payroll system or ATS.



To create a job code:

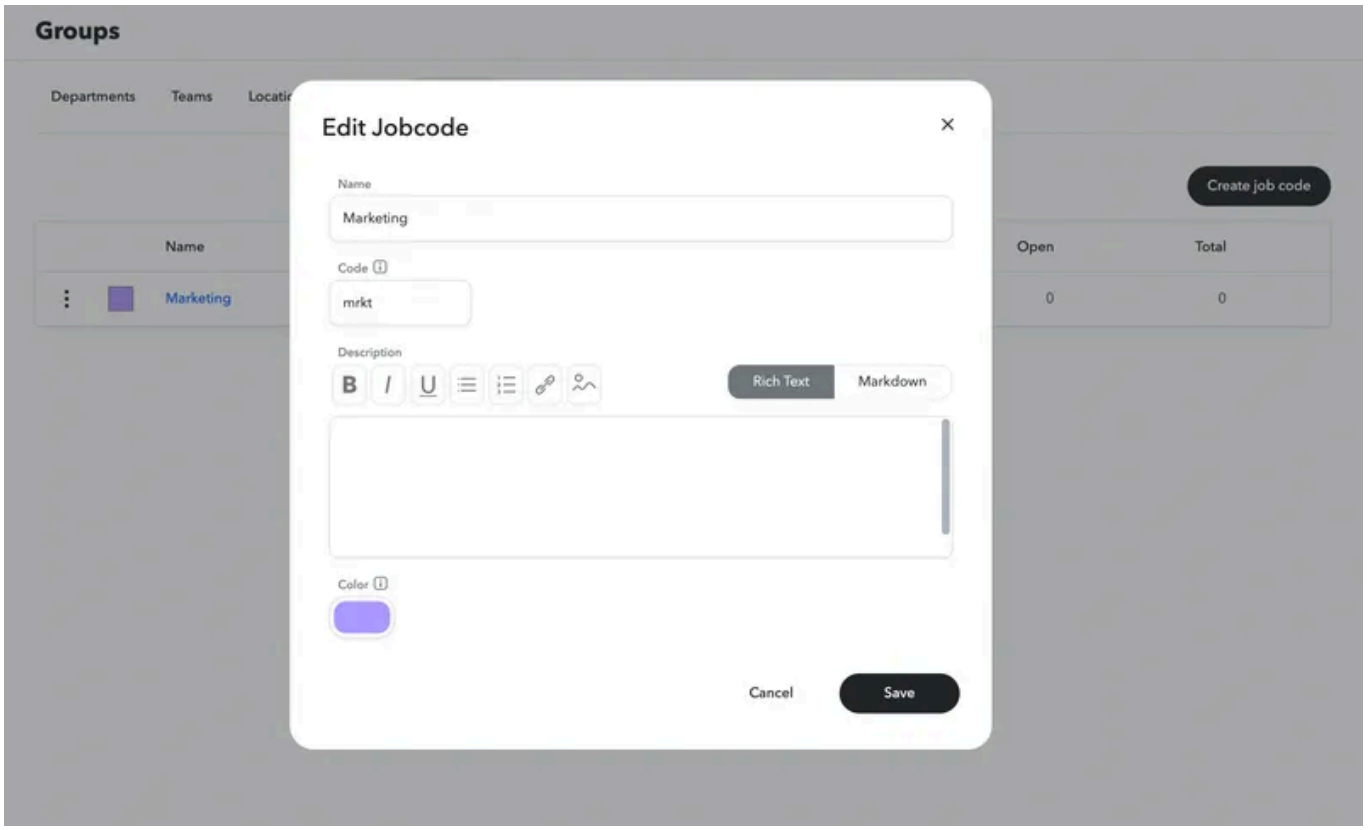
1. From the **Settings** option in the left navigation bar, select **Groups**.
2. Select **Create band** from the the **Bands** tab.
3. From the **New Band** dialog, configure your team using the following settings:
    - **Name:** A required field, is the name or title of your job.
    - **Code:** A required field, is a short code or code number used to uniquely identify the job in other systems.
    - **Description**: A brief summary of the role tied to the job code.
    - **Color:** The color that will be applied to relevant group members in the org chart.
4. Select **Save** when you're done.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.2.8.2. Editing job codes

As a user, you may want to make changes to your job code's, code, name, or description in your ChartHop organization.

> Be aware that changing the name or the code of a job code can result in disruptions to the data syncs in the remote systems that rely on them.



To edit a job code:

1. From the **Settings** option in the left navigation bar, select **Groups**.
2. From the **Job codes** tab, choose the job code you wish to edit by selecting it's action menu. Select **Edit**.
3. Select **Save** when you're done.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.2.9. Sharing Groups

Overview

Sharing Groups allows additional people to help manage and administrate Groups membership and setup.

Similar to Resources sharing, there are two visibilty settings in the Share modal on each Groups page:

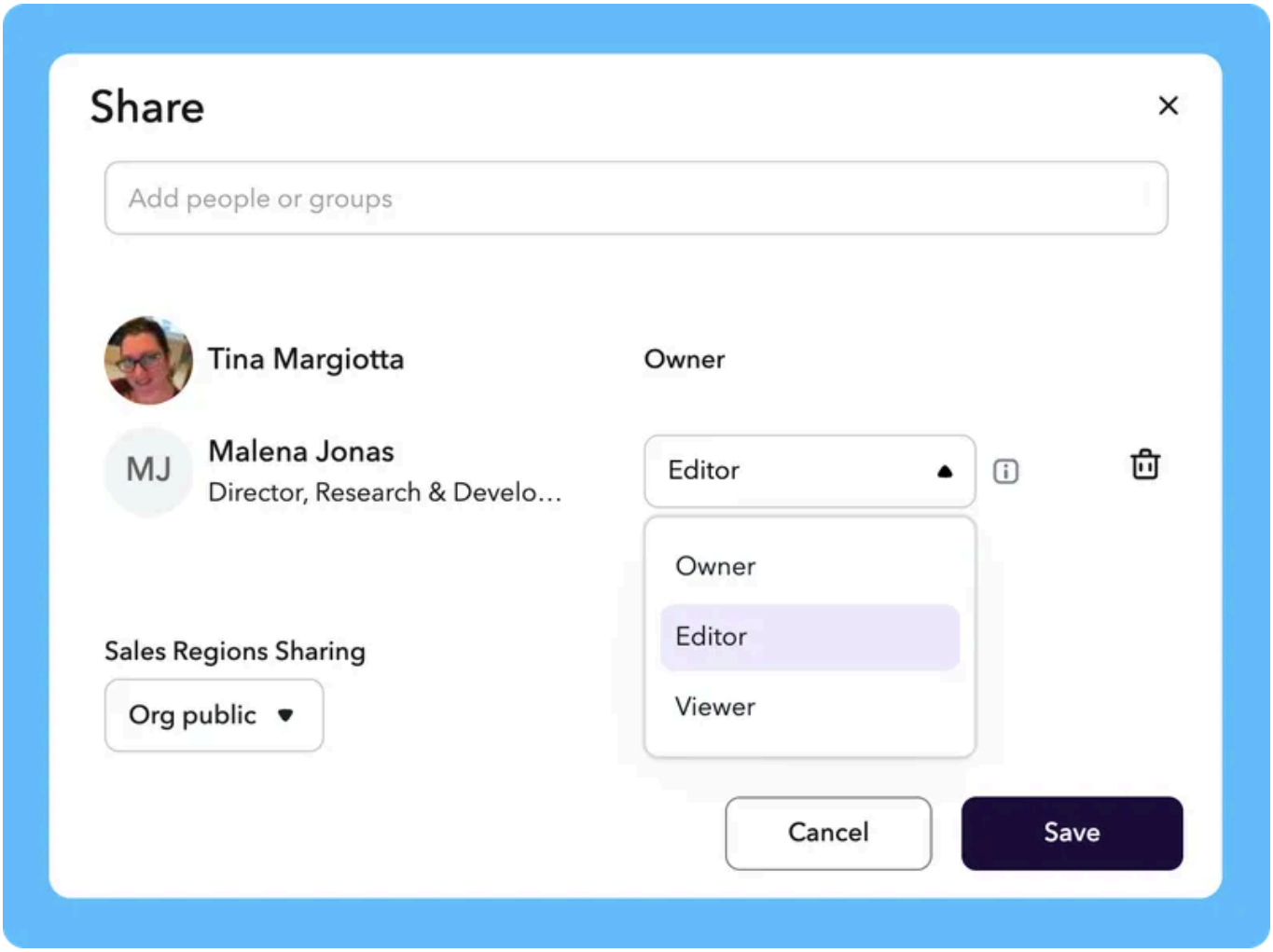
1. Specific user or group sharing for administration of the group
2. Content visibility sharing throughout ChartHop

Sharing with specific users

Open the Share modal in the header of a Group type's list page.

To allow additional users to see or edit this group type, type their name in the top bar and set their acess level in the dropdown.

- **Owner**: User will have the ability to edit the group type, add groups of this type, and manage members for these groups. User will also have the ability to update the sharing permissions of this group type.
- **Editor**: User will have the ability to edit the group type, add groups of this type, and manage members for these groups.
- **Viewer**: User will be able to see the list page of this group type, and view all of the groups and members lists for these groups.

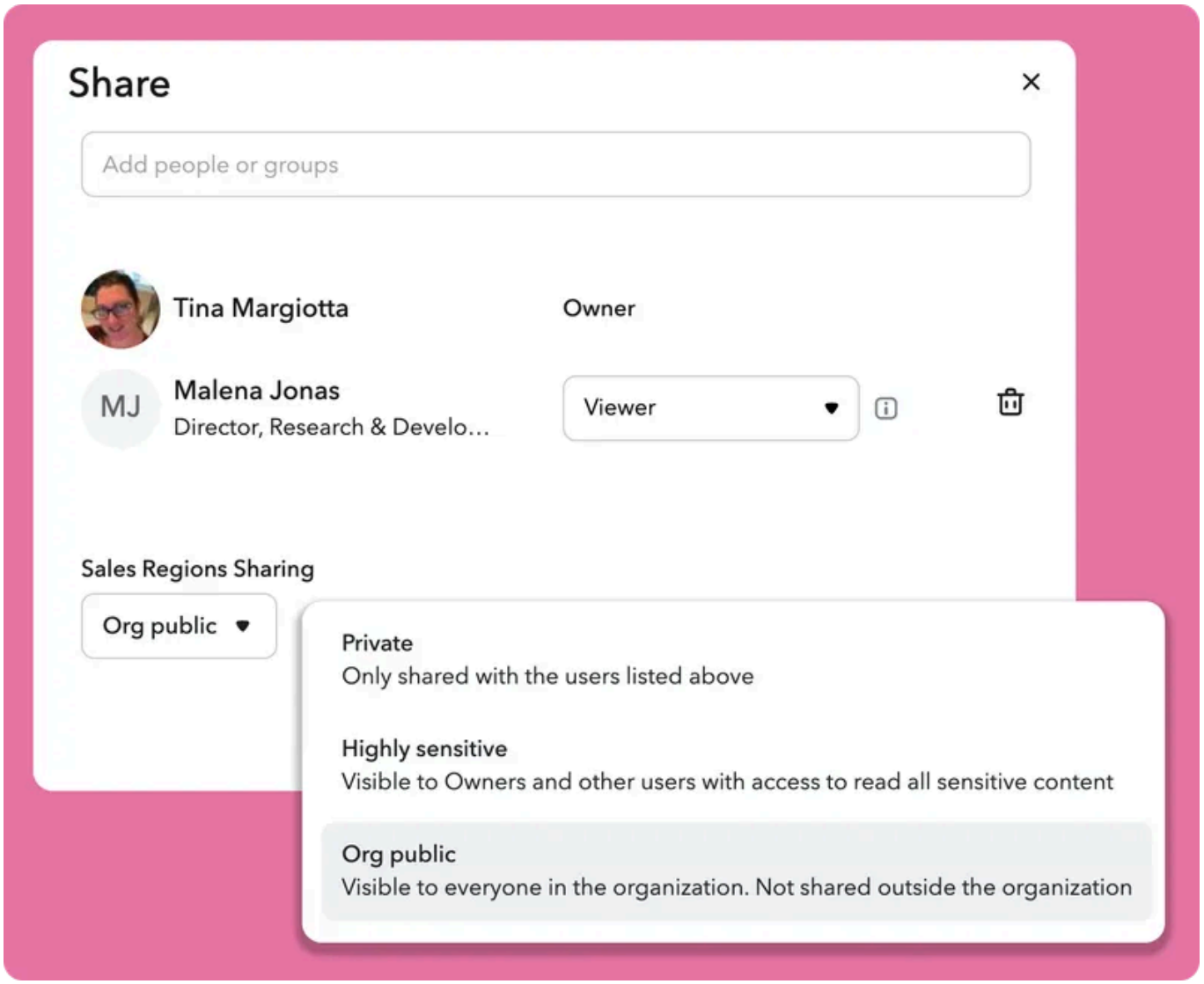


Share with a specific user to see and manage the group type

Sharing with the broader org

To control visibilty of a group type throughout ChartHop, use the group type Sharing dropdown in the lower left corner of the Share modal. This visibility controls who can see the group org chart, see the group membership in Job History and in the Data Sheet, Dashboards, etc.

- **Private**: the group type will only be shared and visible to the users listed in the upper part of the share modal
- **Highly sensitive**: the group type and its groups will be visible to Owners and other users in ChartHop with access to read all sensitive content
- **Org public**: the group type and its groups will be visible to everyone in the organization



Determine org visibility throughout ChartHop for the group type

5.3. Managing people and jobs

About org management

Get an overview of how to update jobs and people.

Working with people

Understand how to move people into jobs.

Working with jobs

Learn how to add new jobs or create backfills.

Working with job history

Use Job History to view a record of org changes.

Announcing org changes

Customize when org changes are announced.

Effective dating

Learn about effective dating for job and people data.

5.3.1. About org management

You can perform a wide range of people management tasks from the **Org Chart** and the **Data Sheet**, ranging from creating jobs to editing employee information. When you perform these actions in your primary org, changes go into effect immediately, so it's important to understand everything you can do, as well as the impact of each task.

You can perform tasks including:

- Adding new jobs in multiple ways
- Backfilling jobs
- Editing individual or multiple jobs
- Filling jobs with new hires or existing employees
- Terminating people
- Transferring or promoting people
- Adding new people to your org

> ChartHop Standard and ChartHop Premium customers can use **Scenarios**, which enable you to plan org changes before pushing them live. If you are a Premium customer, make immediate org changes with the instructions in this section or use Scenarios to plan changes, such as with headcount planning. **Learn more**.

Working on the Org Chart or the Data Sheet

You can complete most tasks on either the **Org Chart** or the **Data Sheet**. Where relevant, instructions have been provided for both.

Work from the **Org Chart** when you want to view your organization as a hierarchy and from the **Data Sheet** when you want to see a large amount of data at once in a list view.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

Roles: Owner | Org editor

5.3.2. Working with people

You can use the **Org Chart** and the **Data Sheet** to make changes to people in your ChartHop organization across a variety of contexts. All changes go into effect immediately, although you can customize when they're announced. **Learn more.**

You can take the following actions on people in the **Org Chart** and **Data Sheet**:

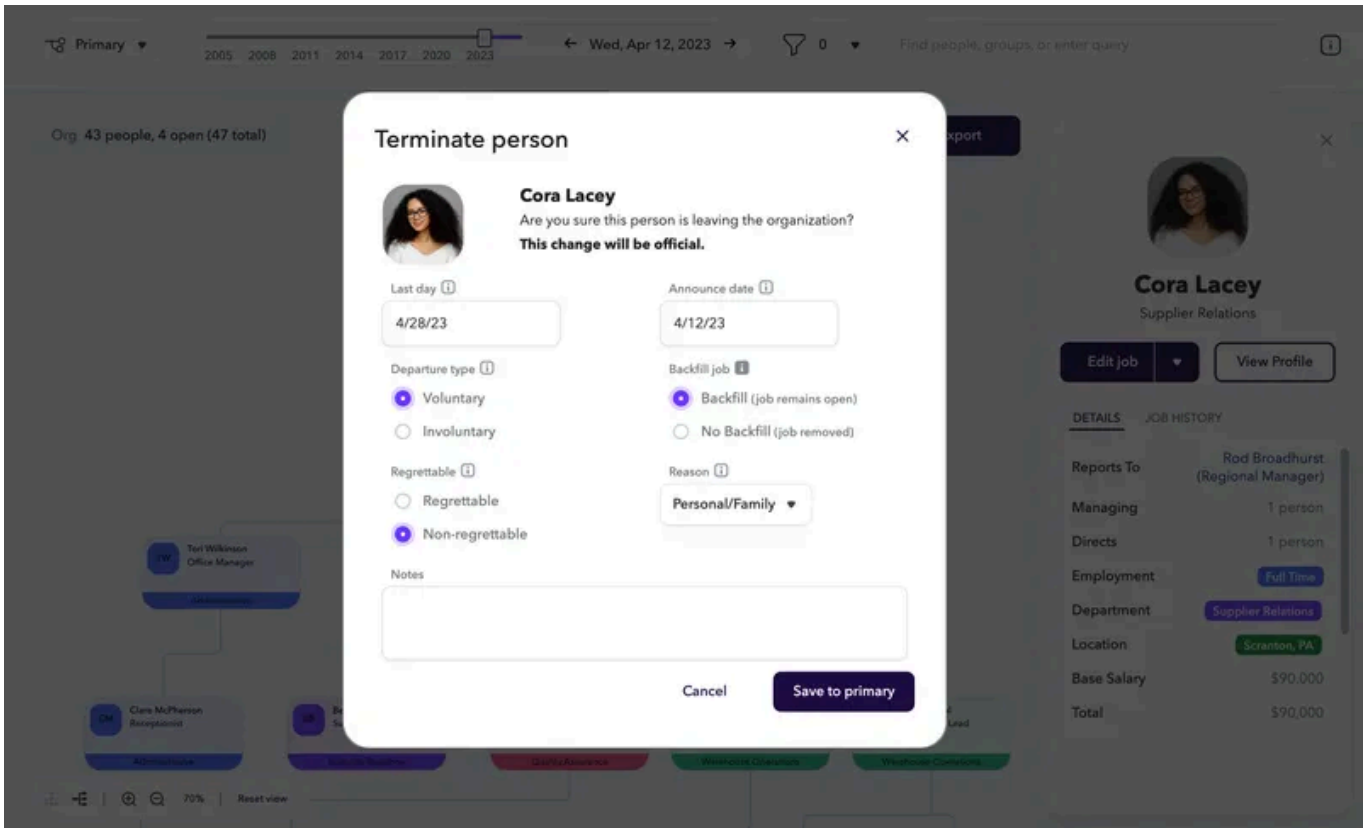
- Terminate a person
- Move a person to a new job
- Rehire a former employee
- Add a new person to your org

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Owner | Org editor

5.3.2.1. Terminate a person

When you terminate a person in ChartHop, you remove them from your current ChartHop organization. You can still search for and view terminated people on the **Data Sheet** or the **Org Chart** by moving the date slider to when they were still with your organization.



To terminate a person:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the person to terminate.
3. In the Profile Summary, from the **Edit job ▼** dropdown, select **Terminate**.
4. In the **Terminate Person** dialog, configure the termination. See the field configuration table below for descriptions.
5. Select **Save to primary** to finish terminating the employee.

You can also terminate a person from the **Data Sheet**. To do this, select the row menu (⋮) for the person you want to terminate and select **Terminate**.

When you terminate a person, an open role is created by default. Selecting **No Backfill** removes the role from your organization on the date you define in the **Last Day** field.

If you set the **Announce date** before the employee's **Last Day** and also select **No Backfill**, then the open role can still display for your organization since the **Last Day** has not passed and the role has not been removed.

Configuring a termination

When you terminate a person, you can configure the following fields:

Field	Description
Last day	The person's last day of employment.
Announce date	The date when the departure becomes visible on the **Org Chart** and is announced to the rest of the organization.
Departure type	The conditions of the departure. You can select from the following options: • **Voluntary** • **Involuntary** This information is only visible to users with access to sensitive data. **Learn more.**
Backfill job	Whether the position is to remain as an open role.
Regrettable	Whether the departure is considered regrettable by your organization. This information is only visible to users with access to sensitive data. **Learn more.**
Reason	The reason for the termination. You can select a reason from the dropdown list.
Notes	Additional notes regarding the termination.

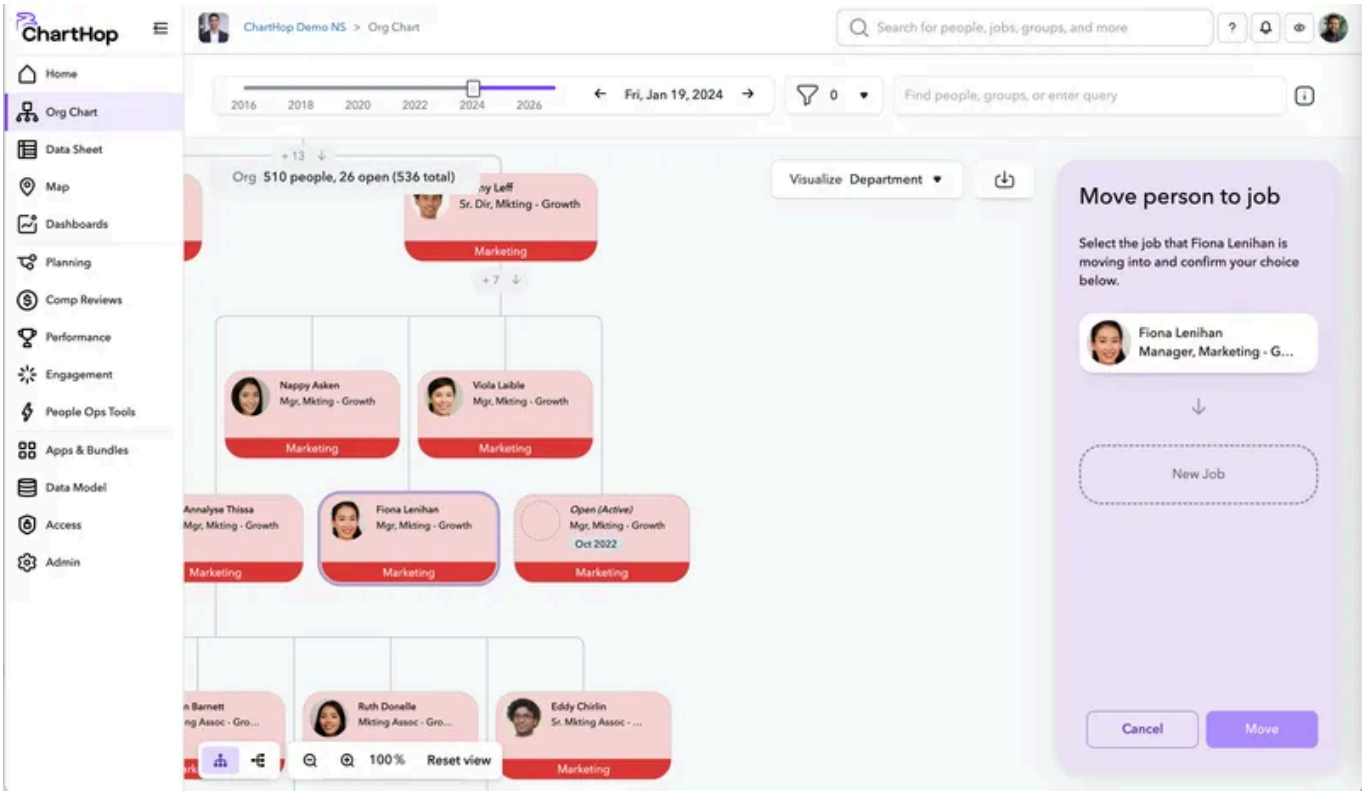
Packages: **Basic** | **Standard** | **Premium**

Roles: Owner | Org editor

5.3.2.2. Move a person to a new job

> **Packages**: **Basic** | **Standard** | **Premium**
>
> **Roles**: Owner | Org editor

You can move a person to a new role in your ChartHop organization by assigning them to an open role. When you do this, you specify whether the move is a transfer, promotion, or demotion.



To move a person to a new job:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the person to move.
3. In the Profile Summary, from the **Edit job** menu, select **Move person**.
4. At the top of the ChartHop window, select the filter icon to display the **Filters** dialog.
5. In the **Filters** dialog, select **Open jobs** to display all open jobs.
6. Select the job into which you want to move the person.
7. Select **Move**.

8. In the **Move Person** dialog, add the following information:
    1. **Move date** - The date on which the move takes place.
    2. **Announce date** - The date on which the move will be announced.
    3. **Move type** - Whether the move is considered a Transfer, Promotion, or Demotion.
    4. **Notes** - Any additional notes related to the move.
9. Select **Save to primary** to finish moving the person.

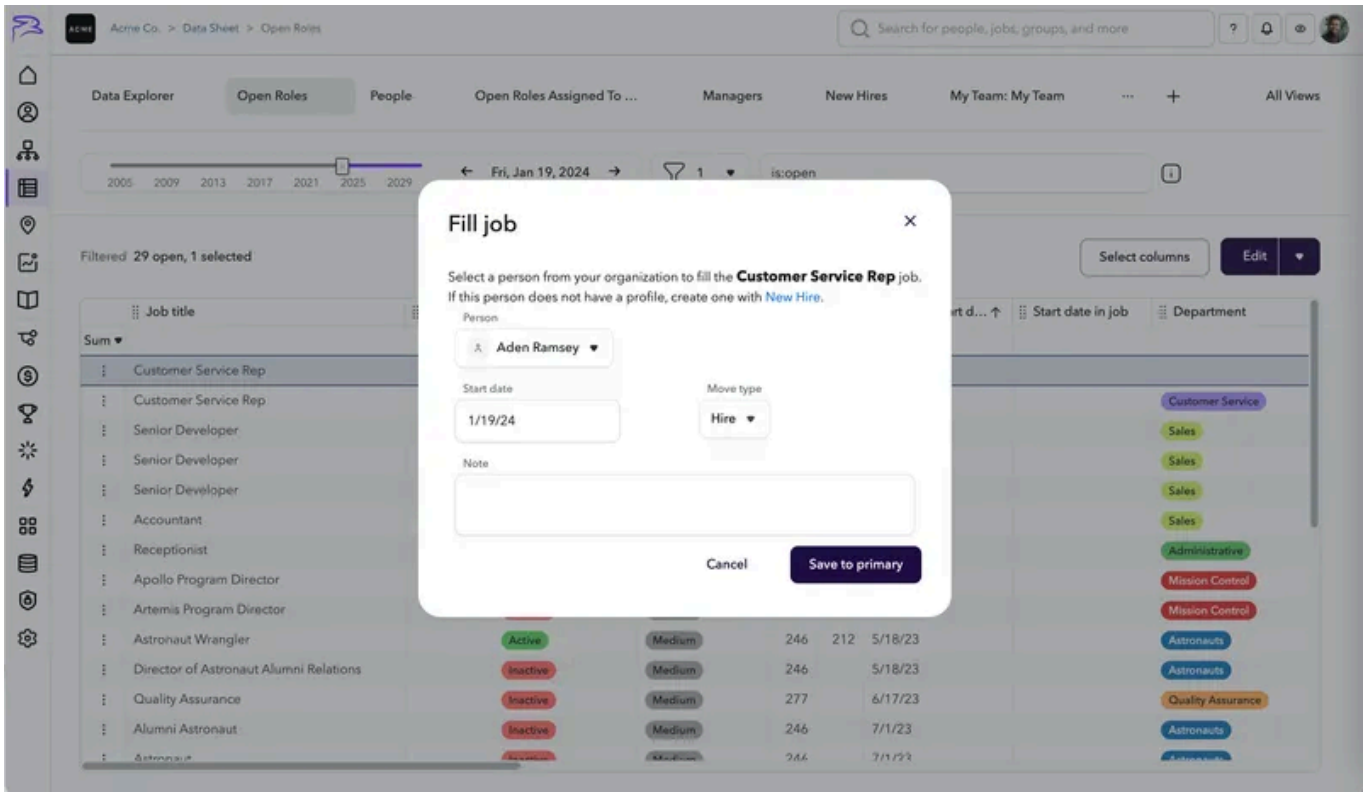
> You can also move a person from the **Data sheet**. To do so, select the row menu (⋮) on the left side of the row for the person to move. In the menu that displays, select **Move person**.

5.3.2.3. Rehire a person

> [Packages](): **Basic** | **Standard** | **Premium**
>
> [Roles](): Owner | Org editor | Recruiting editor

Since ChartHop retains a record of former employees, you can rehire a person who has left your organization by filling an open job with that person.

> After rehiring a person, contact the [ChartHop Support team]() and ask them to merge the person's old profile into their new one to capture their complete history with your org.



To rehire a person:

1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet**, in the row for the job to fill, select the Actions menu (⋮).
3. Select **Fill job**.
4. In the **Fill job** dialog and the **Person** menu, search for the person you want to rehire.

5. Enter the following information:
    1. **Start date** - The start date for the person filling the job.
    2. **Move type** - Select **Hire**.
    3. **Note** - Any additional notes regarding the move.
6. Select **Save to primary** to finish filling the job.

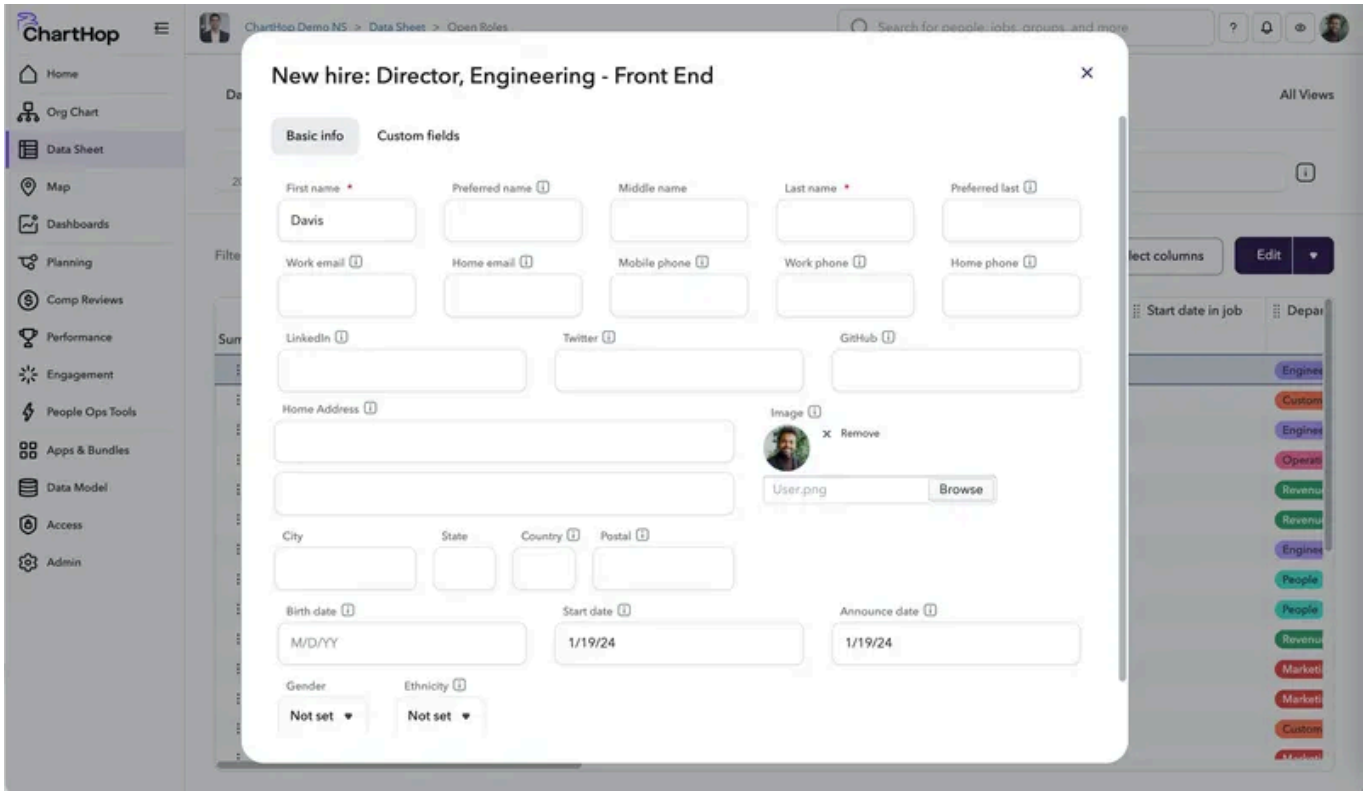
5.3.2.4. Add a new person to your org

> **Packages**: **Basic** | **Standard** | **Premium**
>
> **Roles**: Owner | Org editor | Recruiting editor

Although you usually add new people to your ChartHop organization through integrations, you can add a person manually if needed. To do this, you create an open job and then fill it with a new hire.

If you aren't using integrations and want to add multiple people at once, you can upload a spreadsheet. **Learn more**.

> Note that you can't set a person's start date before their job's creation date. If you need to do so, first change the job creation date. **Learn more**.



To add a new person to your ChartHop organization manually:

1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet**, from the **Edit job** menu, select **New Open Job**.

3. In the **Create job** dialog that appears, add job information to the appropriate sections:
    1. **Structure** - General information including title, department, and location.
    2. **Compensation** - Compensation information including salary and bonus.
    3. **Recruiting** - Recruiting information including hiring status and target start date.
    4. **Description** - A general description about the role.
    5. **Custom fields** - Any custom data added by your organization. **Learn more**.
4. Select **Save to primary** to finish creating a new job.
5. On the **Data Sheet**, in the row for the job you just created, select the Actions menu (⋮).
6. Select **New hire**.
7. In the **New hire** dialog, enter all available information about the person.
   Note that only **First name** and **Last name** are required, but ChartHop strongly recommends adding a **Work email** or **Home Email** since email address is the primary identifier.
8. Select **Save** to finish adding a new person.

5.3.3. Working with jobs

You can use the **Org Chart** and the **Data sheet** to manage new open jobs in your ChartHop organization across multiple contexts. All job changes go into effect immediately, although you can customize when they're announced. **Learn more.**

You can perform the following tasks in the **Org Chart** and **Data Sheet**:

- Add a direct report
- Clone an open job
- Create a new open job
- Backfill a job
- Edit an individual job or multiple jobs
- Fill an open job

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

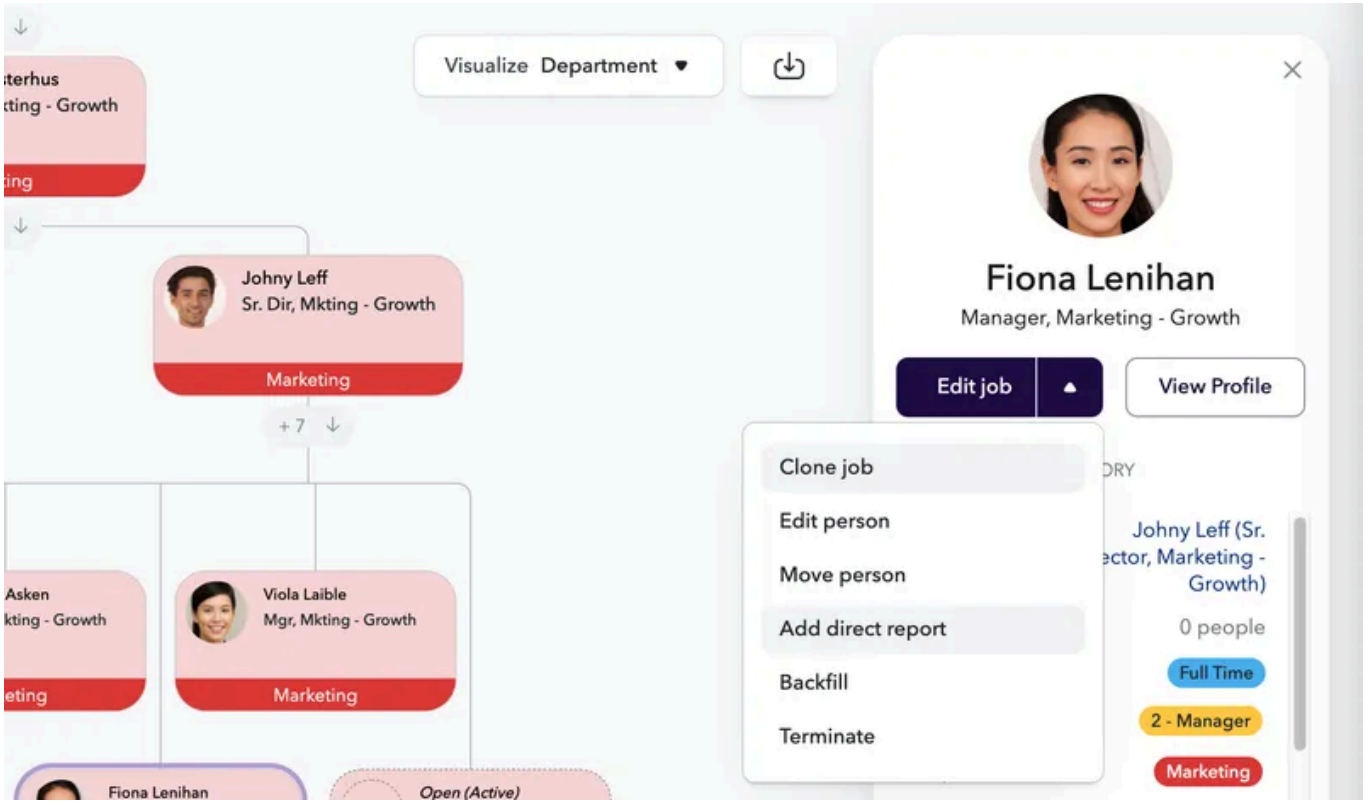
> **Roles**: Owner | Org editor | Recruiting editor

5.3.3.1. Add a new open job

You can add new jobs in ChartHop as direct reports, clone them from existing jobs, or create them as open jobs. Unlike when you perform **headcount planning** with a scenario, all jobs are created immediately.

Add a direct report from the Org Chart

You can add a new direct report for a person or an open job directly from the **Org Chart**. Doing so creates a new open job that reports to the person or job you selected.



To add a new direct report:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the person or open job for whom you want to create a new direct report.
3. In the Profile Summary, from the menu next to **Edit job**, select **Add direct report**.
4. In the **Create job** dialog, add job information to the appropriate sections:
    - **Structure** - General information including title, department, and location.

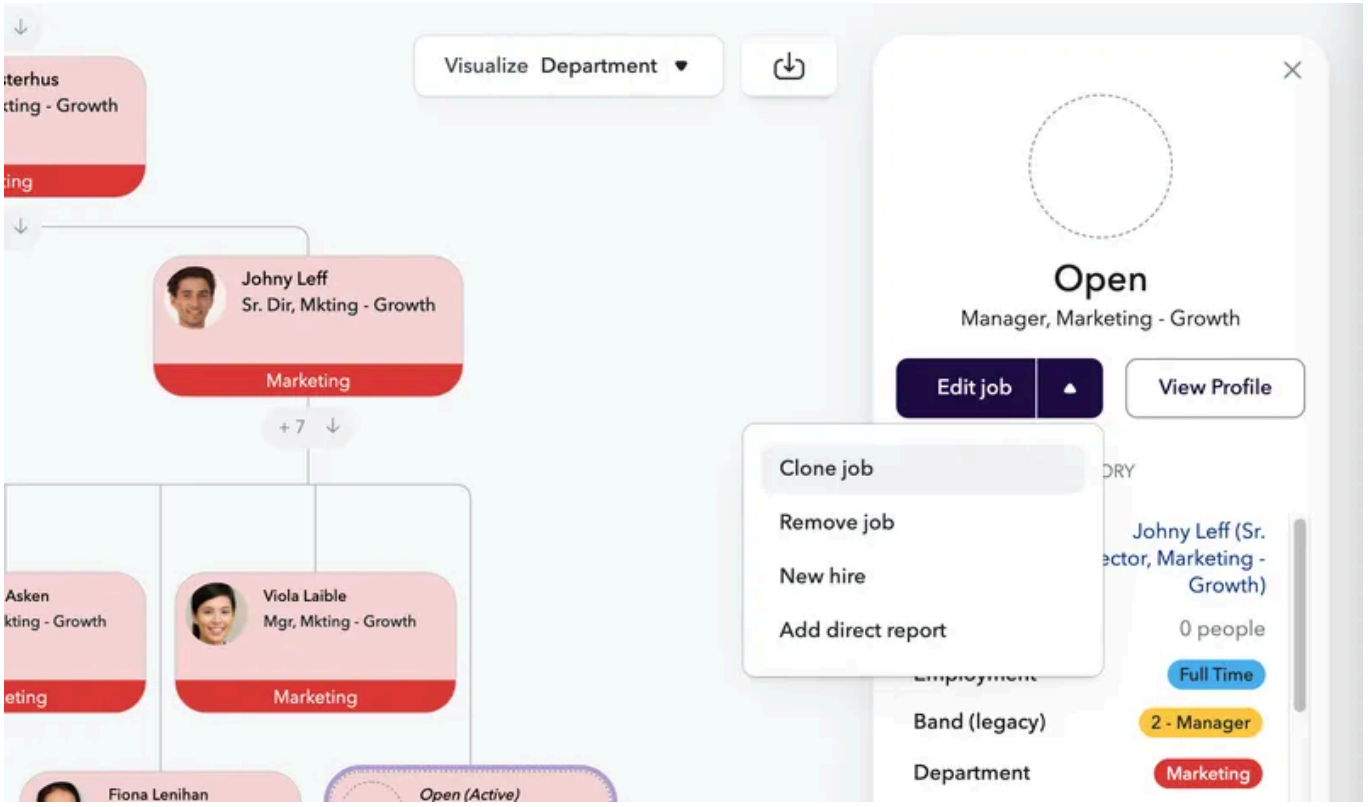
- **Compensation** - Compensation information including salary and bonus.
- **Recruiting** - Recruiting information including hiring status and target start date.
- **Description** - A general description about the role.
- **Custom fields** - Any custom data added by your organization. Learn more.

5. Select **Save to Primary**. A new open job appears below the person or open role on the **Org Chart**.

> - You can also add a new direct report from the **Data Sheet**. To do this, in the row menu (⋮) on the left side of the row for the person to add a direct report for, select **Add direct report**.
>
> - If you do not see a new job, it may be listed in the future. Double-check the Start Date and use the timeline slider at the top of the page to move the **Org Chart** to the appropriate date.

Clone a job from the Org Chart

You can create a new job on the **Org Chart** by cloning an existing job. This is helpful when you don't need to make extensive changes to the job details.



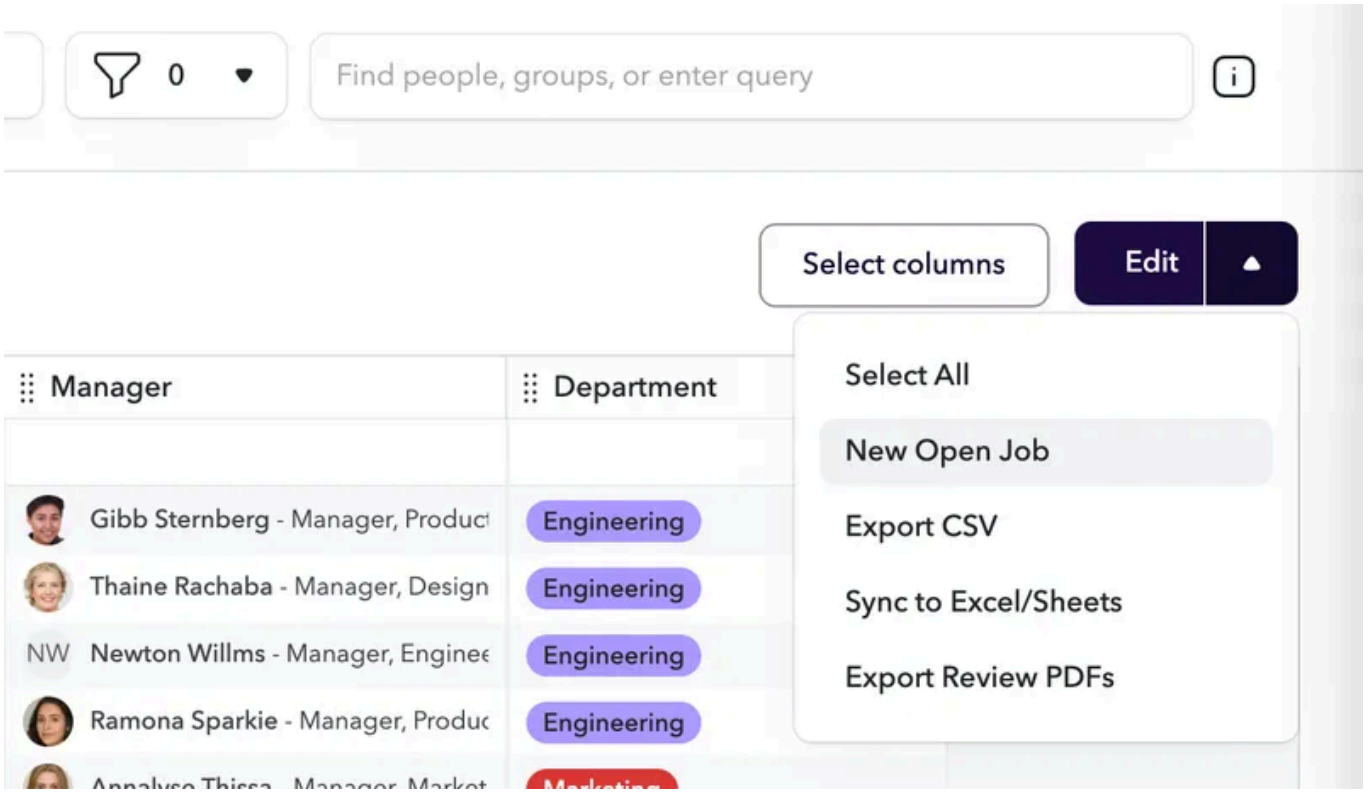
To clone an existing job:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the employee or open job to clone.
3. In the Profile Summary, from the menu next to **Edit job**, select **Clone Job**.
4. In the **Create Job** dialog that appears, make any needed edits to the job details.
5. Select **Save to Primary**. The new job is displayed on the **Org Chart**.

> You can also clone a job from the **Data Sheet**. To do this, in the row menu (⋮) on the left side of the row to clone, select **Clone job**.

Create an open job from the Data Sheet

You can create a new open job directly from the **Data Sheet** as an alternative to cloning an existing job or adding a direct report.



To create an open job:

1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet**, from the **Edit job** menu, select **New Open Job**.
3. In the **Create job** dialog that appears, add job information to the appropriate sections:

- **Structure** - General information including title, department, and location.
- **Compensation** - Compensation information including salary and bonus.
- **Recruiting** - Recruiting information including hiring status and target start date.
- **Description** - A general description about the role.
- **Custom fields** - Any custom data added by your organization, if available. **Learn more.**

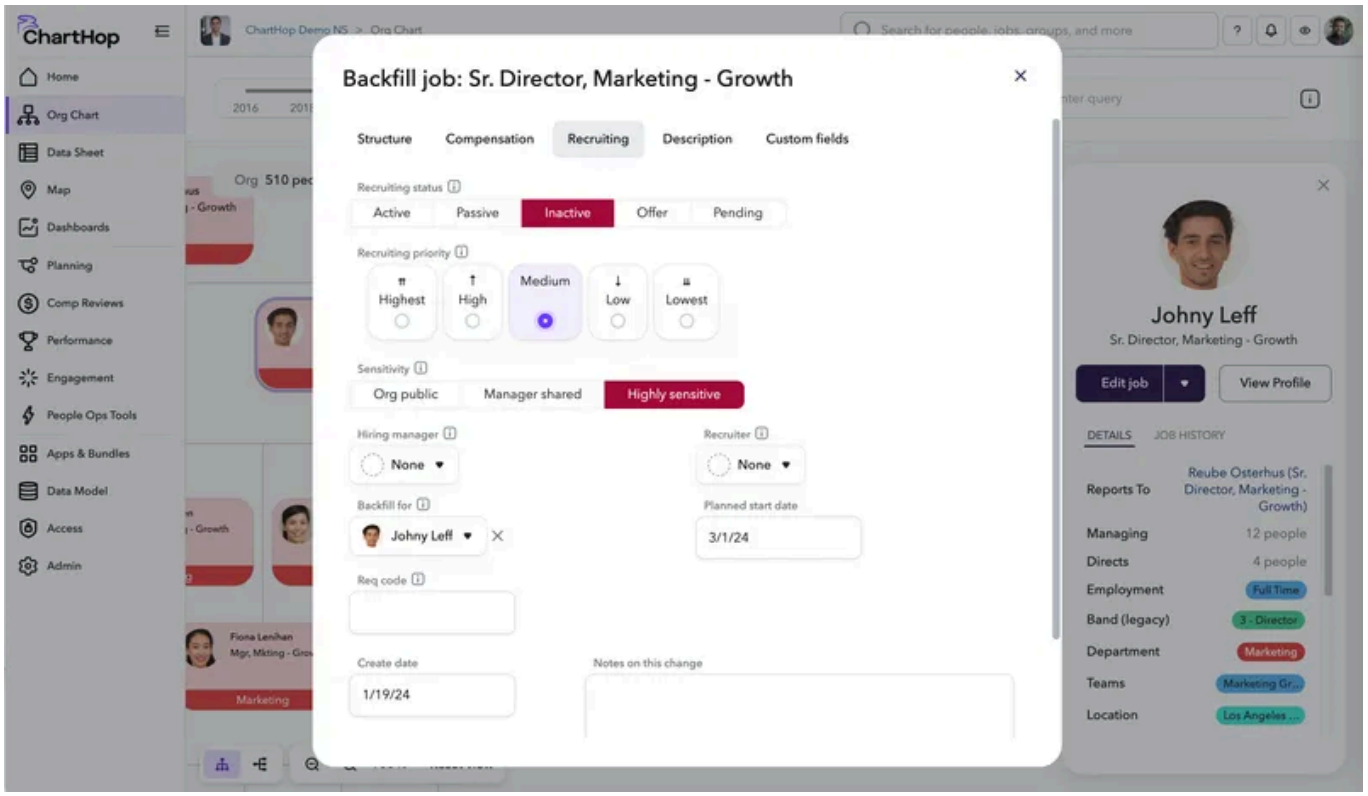
4. Select **Save to primary** to finish creating a new job.

> **Packages**: **Basic** | **Standard** | **Premium**
>
> **Roles**: Owner | Org editor | Recruiting editor

5.3.3.2. Create a backfill for a job

You can backfill directly from the **Org Chart** to reflect that you intend to replace a current employee. When you backfill, the employee remains on the **Org Chart** until terminated and a new open job is created with a start date of two months from today's date, rounded down.

> When a backfill should not display to the rest of your ChartHop organization, be sure to set **Sensitivity** to **Highly sensitive** so that only recruiters with Sensitive access can view the open role. Learn more.



To add a backfill for a job:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the person to backfill.
3. In the Profile Summary, from **Edit job** menu, select **Backfill**.
4. In the **Backfill job** dialog, edit the job information copied from the backfilled employee as follows:
    1. **Structure** - General information including title, department, and location.

2. **Compensation** - Compensation information including salary and bonus.
3. **Recruiting** - Recruiting information including hiring status and target start date.
4. **Description** - A general description of the role.
5. **Custom fields** - Any custom data added by your organization, if available. Learn more.

5. Select **Save to Primary**.
   A new backfill appears on the **Org Chart**.

> You can also create a backfill from the **Data Sheet**. To do this, in the row menu (⋮) on the left side of the row for the person to backfill, select **Backfill**.

Backfill a person who has left your org

You can create a backfill for a person who has left your org. To do so, use the date slider at the top of the **Org Chart** to go back to the person's last day. Then, add a backfill. The backfill appears in your current ChartHop **Org Chart**.

Viewing historical backfills

ChartHop saves backfill information for every position. This information is Sensitive (learn more). You can view information about which jobs were backfilled and by whom in two ways:

- On the **Org Chart**, go to a person's profile and open the **Job History** tab to view all historical backfills for a job.
- On the **Data Sheet**, go to **Select columns** > **Recruiting** and select **Historic Backfill** to view the most recent backfill for a job.

> On the **Data Sheet**, you can also use **Backfill For** to view the most recent backfill for an open job. This field is Org Public, but is cleared when a person is assigned to a job.

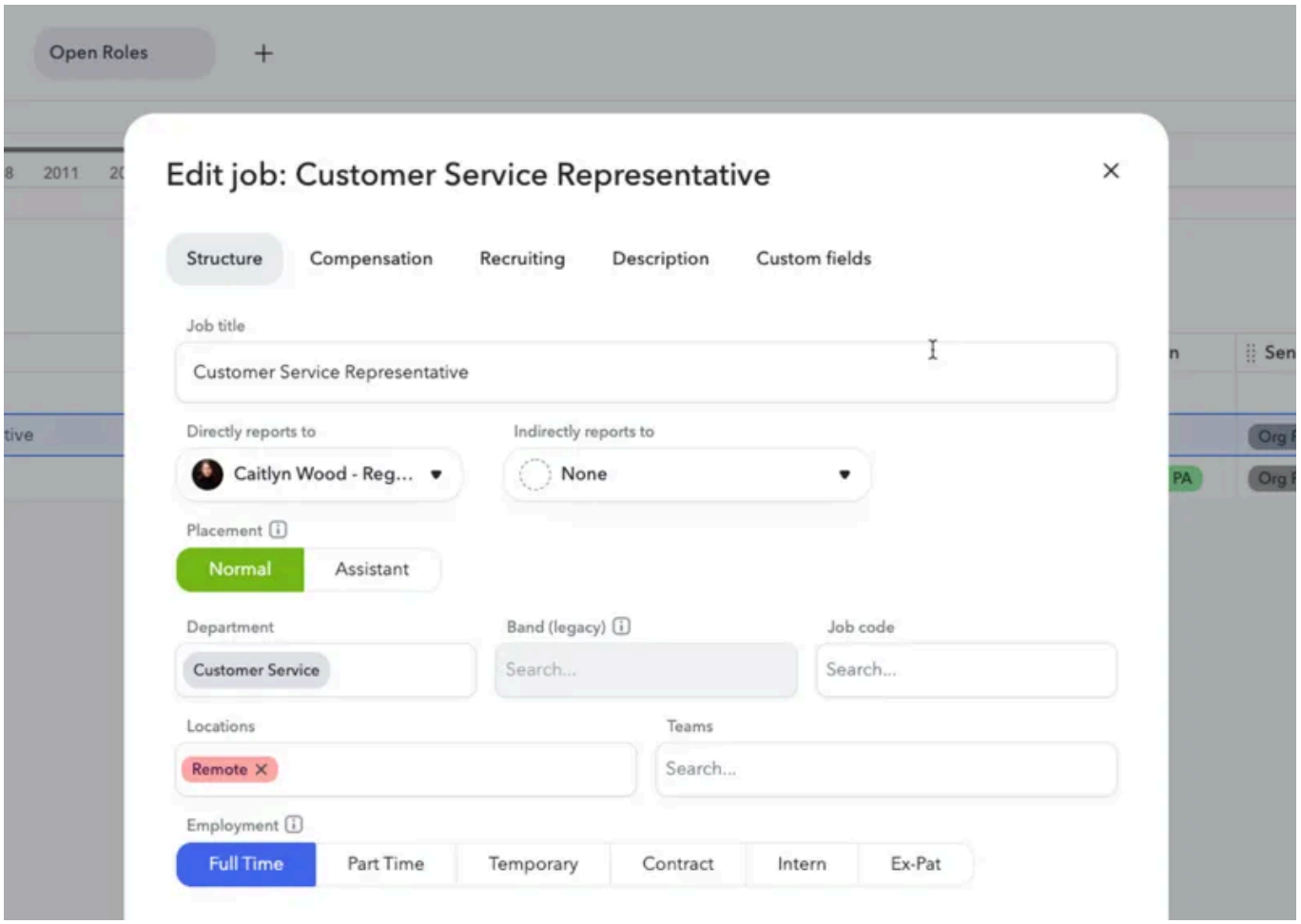
> Packages: **Basic** | **Standard** | **Premium**
>
> Roles: Owner | Org editor | Recruiting editor

5.3.3.3. Edit jobs

On the **Data Sheet**, you can edit an individual job or bulk edit a group of jobs after job creation.

Edit an individual job

You can edit a single job from the **Data Sheet** when you want to change information for that job.



To edit an individual job from the **Data Sheet**:

1. From the left sidebar, select **Data Sheet**.
2. In the Actions menu (⋮) on the left side of the row for the job to edit, select **Edit job**.
3. In the **Edit job** dialog that displays, make your edits.
4. Select **Save to primary** to finish editing the job.

> You can also edit an individual job from the **Org Chart**. To do this, select the job. In the Profile Summary on the right, select **Edit job**.

Edit multiple jobs

To edit multiple jobs on the **Data Sheet**:

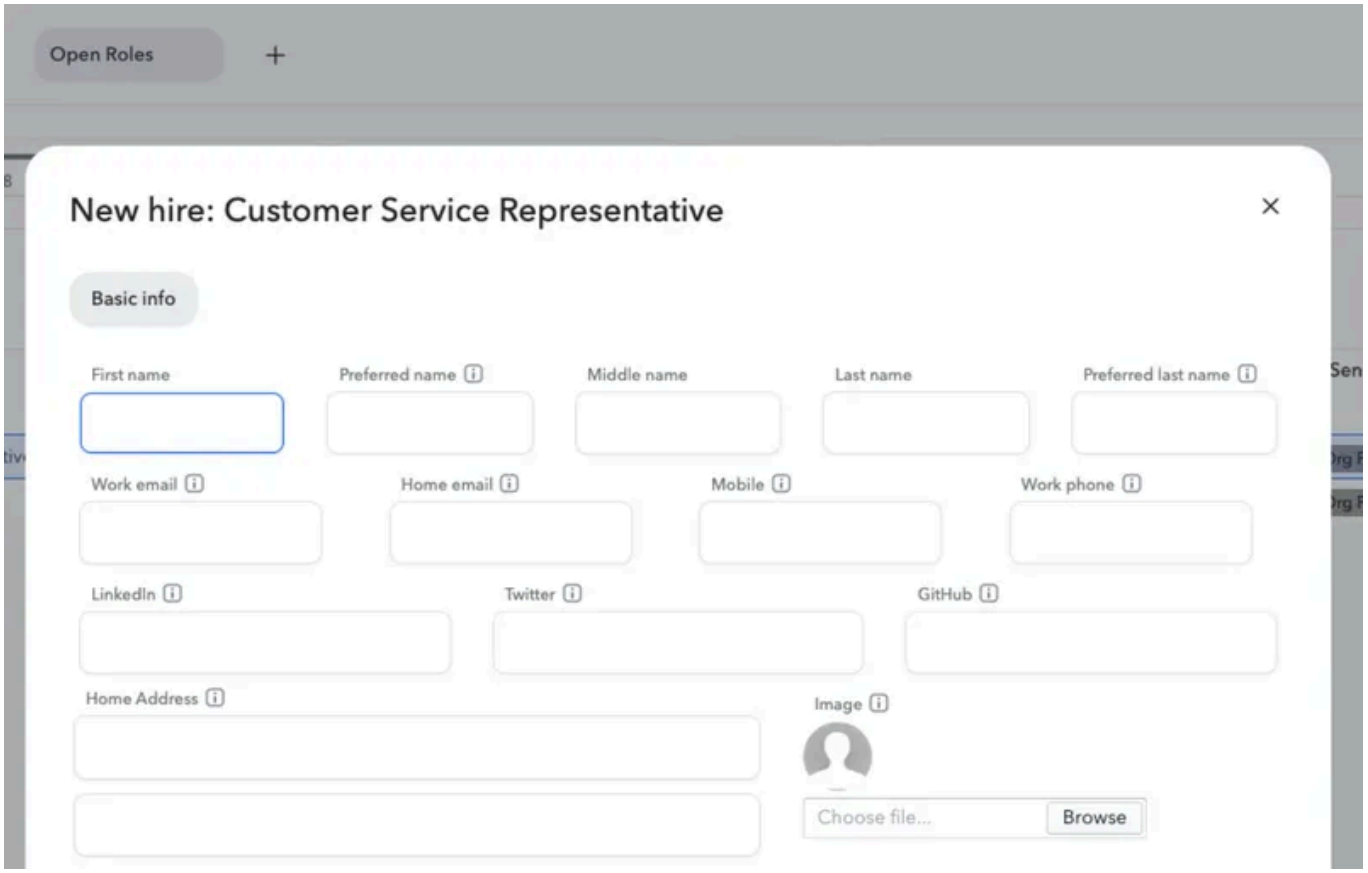
1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet**, find the jobs to edit by:
    1. Entering a **Carrot query** in the filter box.
    2. Choosing **filter criteria** in the **Filters** dialog.
    3. Selecting the **Open Roles** tab.
3. Select **Edit**.
4. Select the cell(s) to edit. You can only edit highlighted cells.
5. Make your edits.
6. Select **Save Changes** to finish editing jobs.

> Packages: **Basic** | **Standard** | **Premium**
>
> Roles: Owner | Org editor | Recruiting editor (for open jobs)

5.3.3.4. Fill an open job

You can fill an open job by assigning it to a new hire or a current member of your ChartHop organization.

Fill a job with a new hire



To fill a job with a new hire:

1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet**, in the row for the job to fill, select the Actions menu (⋮).
3. Select **New hire**.
4. In the **New hire** dialog, enter all available information about the person using the fields featured in the table below.
    - **First name** and **Last name** are required, but ChartHop strongly recommends adding a **Work email** or **Home Email** since email address is the primary identifier.
5. Select **Save** to finish filling the job.

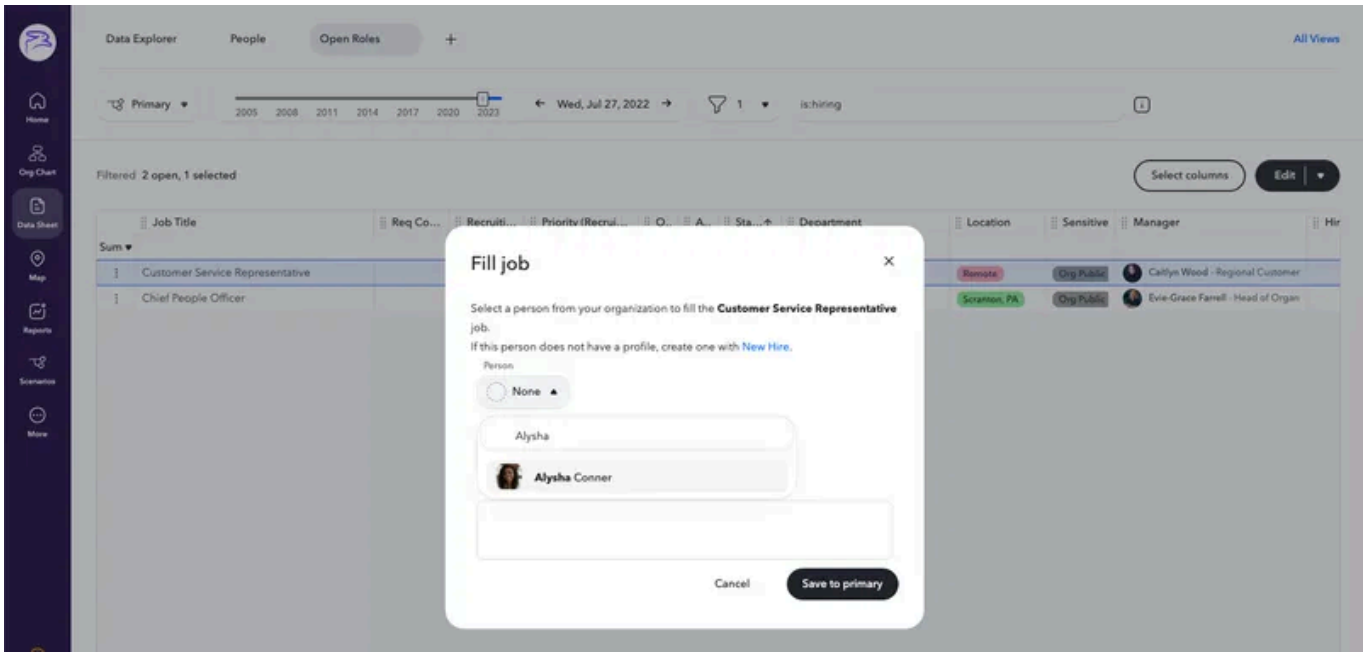
After you add a new hire, you can change the details and effective dates of your additions manually. **Learn more**.

The new hire fields list:

Field name	Description
First name	The new hire's first name. **Required**.
Last name	The new hire's last name. **Required**.
Work email	The new hire's work email. **Recommended**.
Home email	The new hire's personal email. **Recommended**.
Preferred name	The new hire's preferred first name.
Middle name	The new hire's middle name.
Preferred last name	The new hire's preferred last name.
Mobile	The new hire's mobile phone number.
Work phone	The new hire's home phone number.
LinkedIn	The new hire's LinkedIn profile link.
Twitter	The new hire's twitter profile link.
GitHub	The new hire's Github profile link.
Home Address	The new hire's home address.
Image	The image used for the new hire's profile picture.
City	The city of the new hire's home address.
State	The state of the hire's home address.
Country	The country of the hire's home address.

Field name	Description
Postal	The postal code of the hire's home address.
Birth date	The new hire's date of birth.
Start date	The date when the new hire starts at the organization.
Announce date	The date when the new hire will be publicly announced to the organization and determines the date when the new hire will be visible to all other employees on the org chart.
Gender	The new hire's gender.
Ethnicity	The new hire's ethnicity.

Fill a job with a member of your org



To fill a job with a member of your org:

1. From the left sidebar, select **Data Sheet**.
2. On the **Data Sheet**, in the row for the job to fill, select the Actions menu (⋮).
3. Select **Fill job**.

4. In the **Fill job** dialog and the **Person** menu, search for a person from your ChartHop organization to fill the job.
5. Enter the following information:
    1. **Start date** - The start date for the person filling the job.
    2. **Move type** - Whether the move is a transfer, promotion, or demotion.
    3. **Note** - Any additional notes regarding the move.
6. Select **Save to primary** to finish filling the job.

> **Packages**: **Basic** | **Standard** | **Premium**
>
> **Roles**: Owner | Org editor | Recruiting editor

5.3.4. Working with job history

Users with permission to view job history can see this information from two locations in ChartHop: the **Org History page** and the **Job history tab** in a person's employee profile.

Job history is only visible to people with sensititve data access.

From the History page and the **Job history** tab, you can:

- Edit a change date
- Delete a change

You may want to edit or delete a job change when you need to alter a start date or when a person does not join your organization as planned.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Owner | Org editor | Recruiting editor | People ops admin

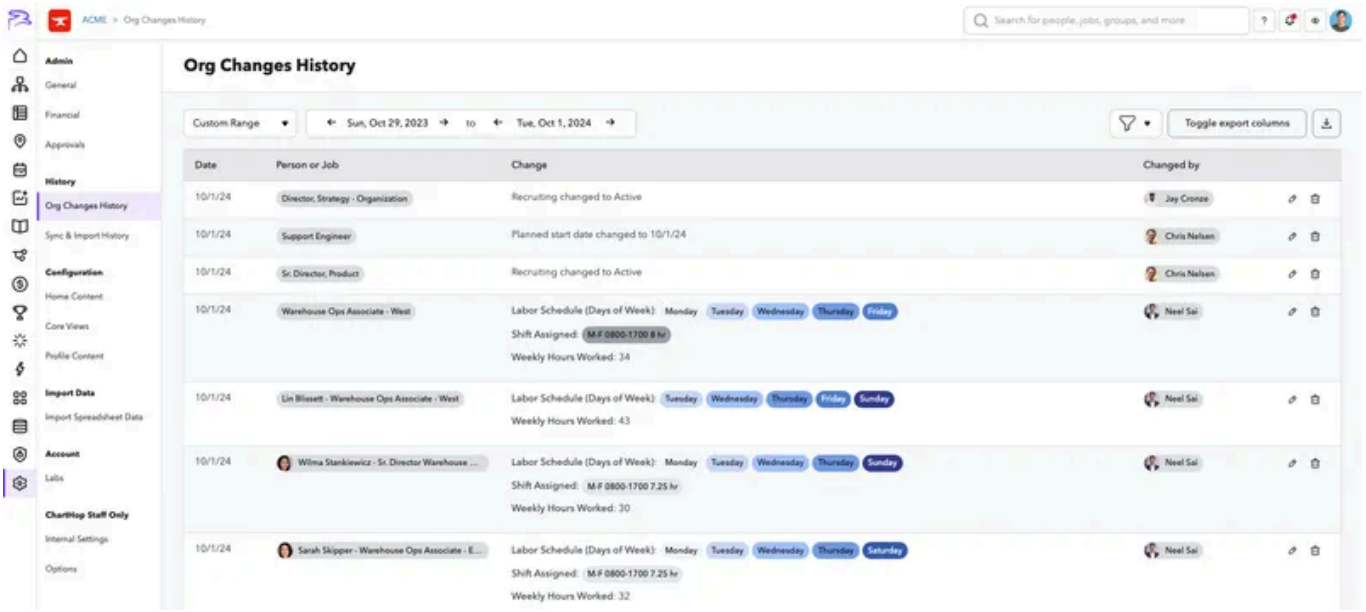
5.3.4.1. Org Changes History page

You can use the **Org Changes History** page as your audit log within ChartHop. It displays all people and job changes on one page and provides information about the type of change, who made the change, and when it was made.

> The **Org Changes History** page keeps track of changes made to **Jobs**, **People in Jobs**, and **Open jobs**. Learn more.
>
> This page is not accessible to all employees.

To view **Org Changes History**:

1. In the left sidebar, select **Admin**.
2. In the sub-menu, select History > **Org Changes History.**

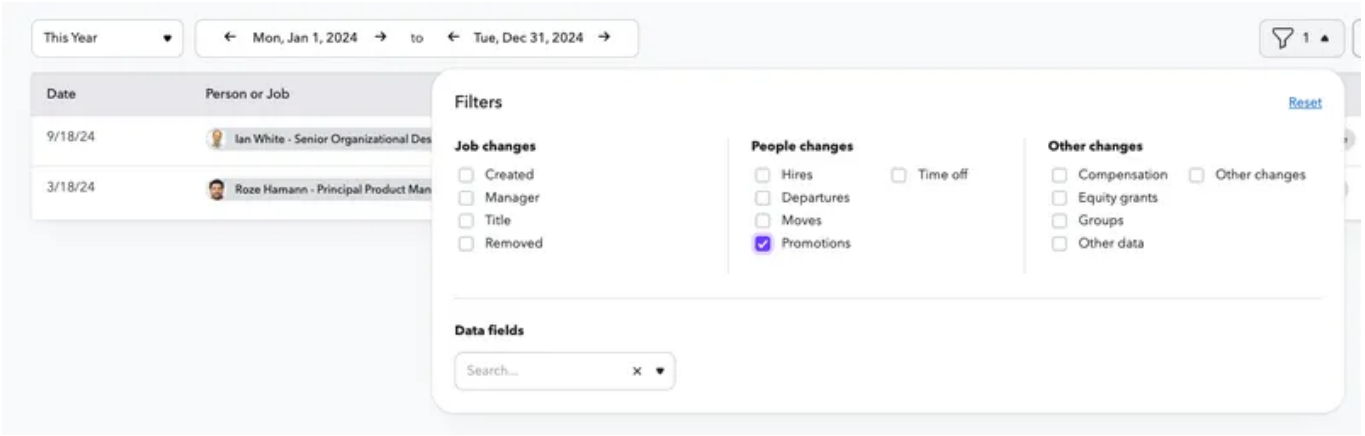


Filtering the History page

You can filter the **Org Changes History** page to show only the information that you are interested in. You can select a specific **date range,** filter by certain types of changes or look for changes to a specific field.

Example: Find a list of all promotions in this calendar year

1. In the left sidebar, select **Admin**.
2. In the sub-menu, select History > **Org Changes History.**
3. Set the **date range picke**r to "This year"
4. In the Filters menu, select **Promotions** to show job changes that are categorized as "promotions."



Exporting history

You can export information from the **History** page to a CSV.

When you export, the CSV will display all of the changes that you see on the screen. Use the date range and filters to select exactly which data you want to export.

To export history information:

1. In the left sidebar, select **Admin**.
2. In the sub-menu, select History > **Org Changes History.**
3. Set up filters to constrain the data you want to export.
4. (Optional) Select **Toggle Export Columns** to select additional fields to add to the CSV.
5. Select the **Download** button to export your CSV.
6. Select the data formatting that best suits your use case.
7. Select **Export**.
8. Select **Download** when your spreadsheet is ready to download.

Export format

The first columns of the history export will contains details about the change.

The following colums will show the changed data. Each field that was changed will display a `Before` and `After` value.

Export for Readability

Change details:

Change Date	Person	Title	Change Type	Change Status	Change Description	Change By	Change Cost	Change Note	Change Announce Date	Change Departure Type	Change Departure Regrettable	Change Departure Reason	Change Promotion Type
9/11/24	Ibby Andrews	HRBP	Update	Active	Started reporting to Christian Horn - CPO	Lucy Balmer	$0	Re-org after departure	9/11/24				

Changed data:

Base Compensation (Before)	Base Compensation (After)	Manager (Before)	Manager (After)
$100,000	$105,000	Davis Betran	Christian Horn

Export for Import/Export

Change details:

changeId	jobId	personId	change.date	person	title	change.type	change.status	change.description	change.by	change.cost	change.note	change.announceDate	change.departType	change.departRegret	change.departReason	change.promotionType
66041 7d38 8795 9668 bd82 9f5	6480 9a1x c24 db30 a37c 48a6 c	5278 b09a 39d5 df29 d8d 2668f	2024-03-18	rozee.hamann@demoemail.com	HRBP	Updat e	Active	Started reporting to Christian Horn - CPO	Lucy.Balmer@demoemail.com	$0	Re-org after departure	2024-03-18				

Changed data:

change.before.BaseComp	change.after.BaseComp	change.before.manager	change.after.manager
$100,000	$105,000	Davis.Betran@demo.com	Christian.Horn@demo.com

Example use cases:

- Export a list of departures within a specific date range
- Export a list of promotions with start date information
- Export changes to a field within a specific time range

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.3.4.2. Edit job changes

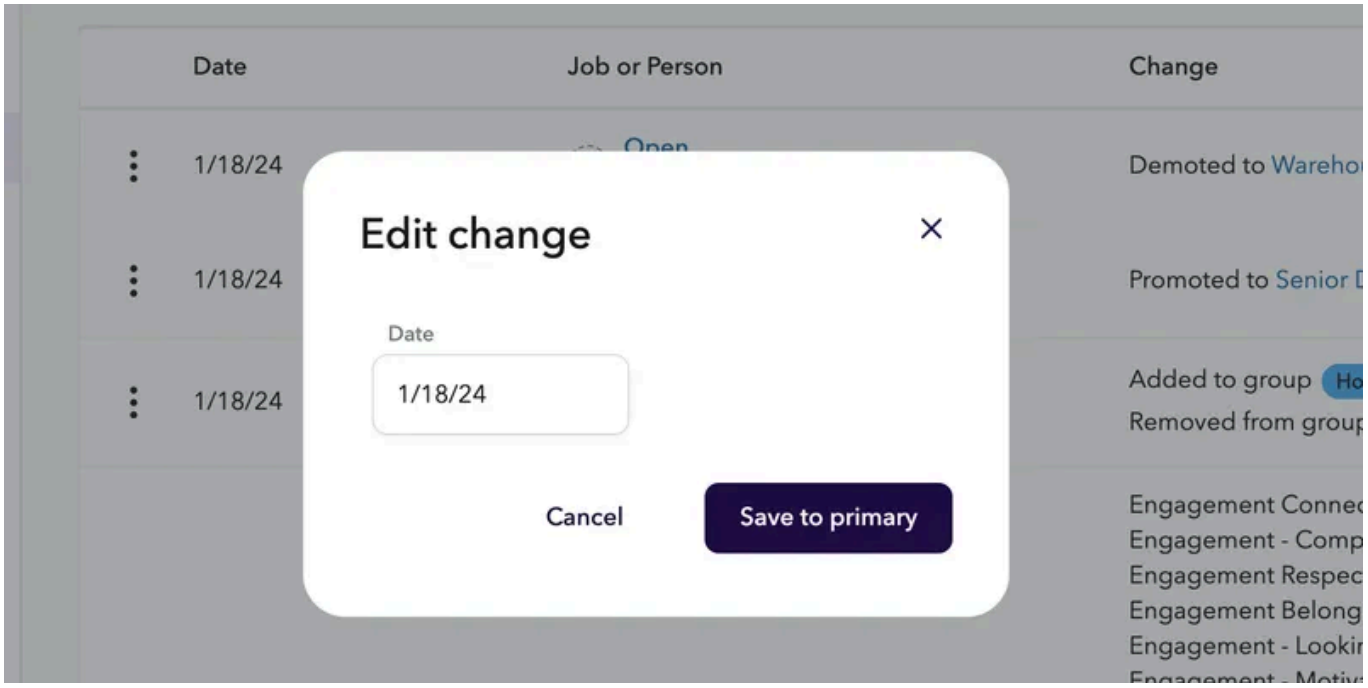
You can edit job changes such as job creation date, start date, transfers, promotions, and terminations. You can do this from the **Job History** tab in an employee profile or on the History page.

For example, you might need to edit the start date for a hire who started later than expected or change the departure reason for a termination.

> You can't set a person's start date to before their job's creation date. If you need to do so, first change the job creation date.

Edit a change from the History page

Use the History page if you want to make multiple edits to your job history as it gives you an easy look into job history across your organization.



To edit a job change from the History page:

1. In the left sidebar, select **Admin**.
2. In the sub-menu, select History > **Org Changes History.**
3. At the far right of the row for the change to edit, select the Pencil icon.

4. In the Edit change dialog, make your changes.
5. Select **Save to primary**.

Edit a change from the Employee Profile

If you only want to change an individual job change, such as a person's start date, you can use the Employee Profile.

To edit a job change from the Employee Profile:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the person whose job history you want to edit.
3. Select **View Profile**.
4. At the far right of the row for the change to edit, select the Pencil icon.
5. In the dialog that appears, make your changes.
6. Select **Save to primary**.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.3.4.3. Undo job changes

You can undo changes you make to people or jobs. You can do this from the History page or from the **Job history** tab within an employee's profile.

For example, you can delete a new hire who was not actually hired or a termination that was accidentally entered. When you delete these changes, the change you make is permanent and cannot be undone. In order to re-do the action, you'll need to go through your process again.

> If you delete a job change from either the History page or the **Job history** tab, there will no longer be a record of the change in ChartHop.

Delete a job change from the History page

You can use the History page if you want to make multiple changes to your job history as it gives you an easy look into the job history across your organization.

1. In the left sidebar, select **Admin**.
2. In the sub-menu, select History > **Org Changes History.**
3. At the far right of the row for the change to delete, select the trash can icon.
4. In the dialog, select **Confirm** to confirm that you want to delete the change.

Delete a job change from the Employee Profile

If you only want to change an individual job history detail, such as revert a job title that was changed for an individual, you can use the respective employee's profile page.

1. Open the Employee Profile of the employee where you want to delete a change. You can do this by selecting the employee on the **Org Chart** or the **Data Sheet**.
2. Select the **Job History** tab.
3. At the far right of the row for the change to delete, select the trash can icon.
4. Select **Confirm** to confirm that you want to delete the change.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.3.5. Announcing org changes

When you make org changes such as new hires, transfers, or terminations, they're announced to your ChartHop organization on the **Org Summary** section of the **Home** page. Learn more.

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

As shown in the following table, you can customize when and how org change announcements appear on the **Home** page.

Org change	Shown under...	How to customize
Add an open job	**Open Jobs**	Set **Effective date of change** to the future.
Backfill a job	**Open Jobs**	Set **Sensitivity** to **Highly sensitive**.
Edit a job	**Open Jobs**	Set **Effective date of change** to the future.
Fill a job	**People Moves**	Set **Announce date** to the future.
Terminate a person	**People Moves**	Set **Announce date** to the future.
Transfer a person	**People Moves**	Set **Announce date** to the future.
Exchange two jobs	**People Moves**	Set **Announce date** to the future.
Rehire a person	**People Moves**	Set **Start date** to the future.
Add a new person	**People Moves**	Set **Announce date** to the future.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.3.6. Effective dating

With effective dating, you can specify when changes to your job and employee data are rendered effective. When viewing organizational history, effective dates allow you to differentiate between the day you plan a change to your organization and the actual day the change is put into effect.

Some examples of effective dating include:

- Setting up a vacation time today that will be put into effect in the following week.
- Planning a promotion that will take effect in the following quarter.
- Creating a departmental change for an employee today that will be put into effect later.

When you set an effective date, it helps you track the difference between the date you make a change and the date the change takes effect.

Creating effective dates

Effective dates help you to schedule changes to an employee's or job's status in the future, or you can use them to set dates retroactively.

You can set effective dates for changes you make to your ChartHop organization when using the Data Sheet, creating or editing jobs, importing spreadsheet data, or automatically through the app settings of any payroll app that supports effective dating via historical data.

After you create effective dates for your job and employee data, you can view and update them.

Effective dating for ChartHop fields

Not all ChartHop fields support effective dating. For example, you can't set effective dates on changes to personal data, such as employee addresses, phone number and so on.

To view a list of the fields where you can set an effective date, use the Fields page to search for the field in the **Fields** page table and checking if the label in the **Date** column reads "Yes". **Learn more**.

> If you have not manually set an effectively date for a field, ChartHop assumes the effective date to be the day the change is applied.

Effective dating for payroll apps

If your payroll app supports effective dating, keep in mind that effective dates are synced only for ChartHop fields that support effective dating.

The following payroll apps support effective dating:

- BambooHR
- Humaans
- Ultipro
- Zenefits

> Payroll apps respect the effective date of changes and only sync new info when it becomes effective.

5.3.6.1. Creating effective dates

You can create effective dates in order to schedule changes to your job and employee data that can be applied in the present, past (backdated), and future.

Where to set effective dates

You can set effective dates from the following locations in ChartHop:

- Data Sheet
- When creating and editing jobs
- Spreadsheet import tool
- Payroll app settings

Set effective dates from the Data Sheet

You can set effective dates for specific job and employee data from the **Data Sheet**. By default, when editing data in the **Data Sheet**, your edits are put into effect the same day you make the change. For example, you could edit an employee's information in the **Data Sheet** by changing their department and manager assignments today. Once you've saved the edits, the changes are put into effect immediately and the effective date would be set to today's date.

Alternatively, you can use the date slider/picker tool to set effective dates for data to occur sometime in the past (backdating) or in the future. For example, you can make similar edits in the **Data Sheet** by changing another employee’s department and manager assignments. However this time, before making those changes in the **Data sheet**, you can set the date slider/picker to a future date which automatically sets the effective date for the change to occur on that date after the changes are saved.

To set effective dates using the **Data sheet**:

1. From the left sidebar, select **Data Sheet.**
2. Select **Edit**.
3. Use the date slider/picker tool to select the date you want your changes to take effect.
4. Make your changes in the **Data sheet**.

5. Select **Save changes**.

Set effective dates when creating and editing jobs

When creating or editing a job you can determine when the job's changes will be put into effect by specifying a date.

To set effective dates when creating and editing jobs:

1. From the left sidebar, select **Org Chart**.
2. On the **Org Chart**, select the person or open job you want to edit (for example, by adding a direct report or editing job details)
3. In the Profile Summary, you can edit a person's job by selecting **Edit job**, or open the menu next to the button and select **Add direct report**. Learn more.
4. In the **Create job** or **Edit job** dialog, add job information to the appropriate sections as needed.
5. Depending on whether you're creating a job or editing a job, under the **Structure** tab, the effective date section will be labeled accordingly:
    - **Create date** - The effective date label used when creating a job.
    - **Effective date of change** - The effective date label used when editing a job.
6. Once you've filled out your appropriate changes and selected **Save**, your job edits will be put into effect according to the date you supplied to the **Create date** or **Effective date of change** sections.

Set effective dates from a spreadsheet import

You can set effective dates for multiple jobs in bulk using the spreadsheet import tool. To do this, add a date column to your spreadsheet when importing new job and employee data. When you include the date column and assign a date, ChartHop will automatically assign the date in the column as the data's effective date. Learn more.

If you don't include the date column, the effective dates for the job and employee data will default to the day you import the information into ChartHop.

5.3.6.2. Viewing effective dates

You can view your scheduled effective dates for your job and employee data across multiple locations in ChartHop.

Where to view effective dates

You can view the effective dates for both job and employee data in your ChartHop organization in the following places:

- Org Changes History page
- Personal history tab
- Job history tab
- Compensation tab

View effective dates in the History page

On the Org Changes History page page, the **Date** column lists the effective dates for each event.

View effective dates in the Personal history tab

You can view a list of effective dates associated with an employee's personal history in your ChartHop organization by checking their **Personal history** tab.

To view effective dates in a person's **Personal history** tab:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you wish to view.
3. In the employee's profile summary, select **View profile**.
4. From the employee's profile page, select the **Personal history** tab.

View effective dates in the Job history tab

You can view a list of effective dates for an employee's job history in your ChartHop organization by checking their **Job history** tab.

To view effective dates in a person's **Job history** tab:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you wish to view.
3. In the employee's profile summary, select **View profile**.
4. From the employee's profile page, select the **Job history** tab.

View effective dates in the Compensation tab

You can view a list of effective dates for an employee's compensation history in your ChartHop organization by checking their **Compensation** tab.

To view effective dates in the Compensation tab:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you wish to view.
3. In the employee's profile summary, select **View profile**.
4. From the employee's profile page, select the **Compensation** tab.

The **Date** column under the **Cash compensation history** section lists the effective dates.

5.3.6.3. Updating effective dates

You can update the effective dates of particular changes to your job and employee data, such as start dates for new employees, or backdating compensation changes.

When updating effective dates you can specify a new date either in the present, past (backdated), or future.

Where to update effective dates

Update effective dates from the following locations in ChartHop:

- Data Sheet
- Org Changes History page
- Personal history tab
- Job history tab

Update effective dates in the Data Sheet

Whenever you make changes to data in the **Data Sheet**, the effective date automatically sets to whatever day you have selected in the date picker/sider tool when the change is saved.

Update effective dates in the History page

You can update effective dates for jobs and employees from the Org Changes History page page.

To update effective dates for changes to employee data in the History page:

1. In the left sidebar, select **Admin**.
2. In the sub-menu, select History > **Org Changes History.**
3. On the row of the change you want to edit, select the pencil icon.
4. In the dialog, enter your new effective date.
5. Select **Save to Primary**.

Update effective dates in the Person history tab

You can update effective dates for an individual employee's personal history data, from the **Person history** tab on their profile page. For example, backdating an employee's promotion date to one week prior.

To update effective dates for an employee in the **Person history** tab:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you wish to view.
3. In the employee's profile summary, select **View profile**.
4. From the employee's profile page, select the **Personal history** tab.
5. On the row of the change you want to edit, select the pencil icon.
6. Select **Edit**.
7. In the dialog, enter your new effective date.
8. Select **Save to Primary**.

Update effective dates in the Job history tab

You can update effective dates for an individual employee's job history data, from the **Job history** tab on their profile page. For example, adding a person's job to a new group at a later date.

To update effective dates for an employee in the **Job history** tab:

1. From the left sidebar, select **Org Chart**.
2. In the **Org Chart**, select the employee whose profile you wish to view.
3. In the employee's profile summary, select **View profile**.
4. From the employee's profile page, select the **Job history** tab.
5. On the row of the change you want to edit, select the pencil icon.
6. Select **Edit**.
7. In the dialog, enter your new effective date.
8. Select **Save to Primary**.

5.4. Dashboards

Users can create custom dashboards to analyze various aspects of your organization's data.

When you create a dashboards, you leverage the data you collect using the built-in and custom fields you use in ChartHop. For example, you can create dashboards to analyze responses to your employee surveys, evaluate compensation metrics, visualize the performance ratings for a department, and so much more.

Each dashboards is made up of one or more *charts*. Charts display specific data measures in the chart type format you select (for example, in a Line chart over time or in a Pie chart). Charts can be filtered and configured independently from the settings used in an overall dashboard.

You can create dashboards to be private, shared with the entire organization, or shared only with those who have access to highly sensitive data.

To access dashboards, select **Dashboards** from the left sidebar.

> ChartHop Basic users cannot create custom dashboards and only have access to the following pre-built charts:
>
> - Headcount over time
> - Headcount by location
> - Headcount by gender
> - Headcount by department

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.4.1. Working with custom dashboards

You can create custom dashboards in ChartHop to analyze data in your organization. To create a custom dashboard, you must first add a new dashboard and then create charts within it to present your data visually.

For example, you can create a dashboard on gender identities in your organization. You can add a pie chart showing the gender distribution on the executive team, a second pie chart showing the gender distribution among all employees, and a line chart showing the gender distribution in hiring over time. All of these charts would be available within the same dashboard.

> Data in ChartHop dashboards can only be filtered down to weekly values. To view job-related data (for example, departures) on specific dates within a date range, use the History page to filter, view, and export data. **Learn more.**

Create a new dashboard

The first step in building a custom dashboard is adding a new one. This dashboard is initially displayed as empty, and you must add charts to start visualizing your data.

To create a new dashboard:

1. From the left sidebar, select **Dashboards**.
2. Select **Create dashboard**.

Once you have created a new dashboard, you can configure charts to display within the dashboard.

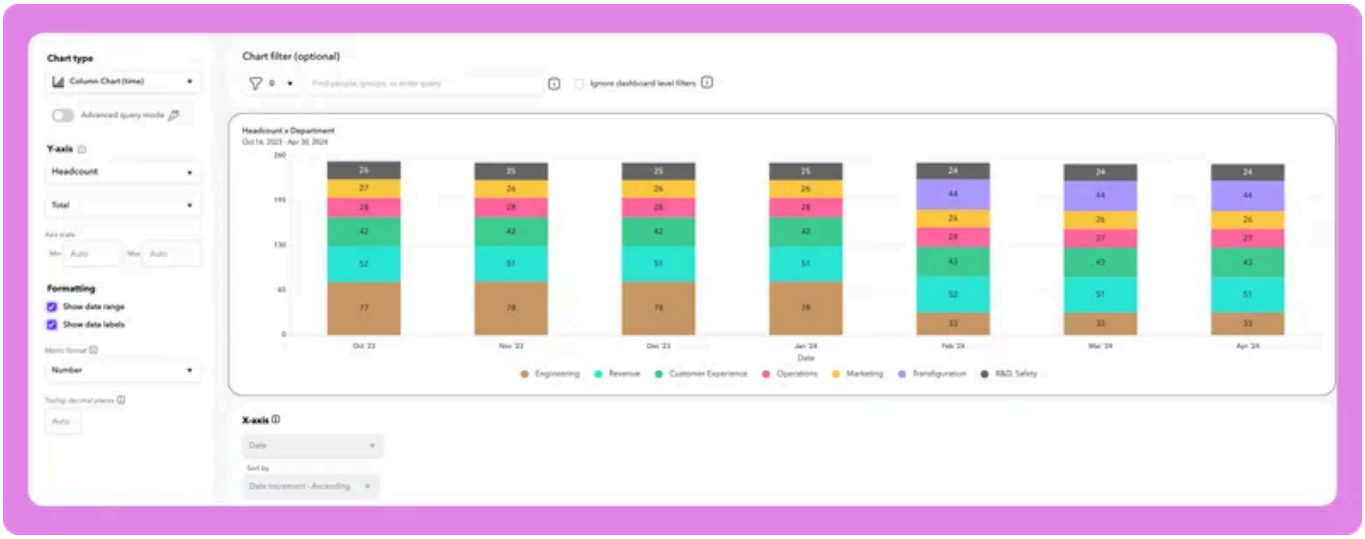
> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.4.2. Configuring charts

Configuring charts in your dashboard

Charts display the data within your dashboards. When you add a chart, you select the data measures that are included, how those measures are aggregated (for example, total, % of total), and what dimension(s) to break the measures into. Each chart type contains different configuration dropdowns so that you can easily build and customize your chart.

You can add global data filters that apply to all charts within your dashboard, or use chart-specific filters for each chart. You can also configure charts to ignore global dashboard filters when they are applied.



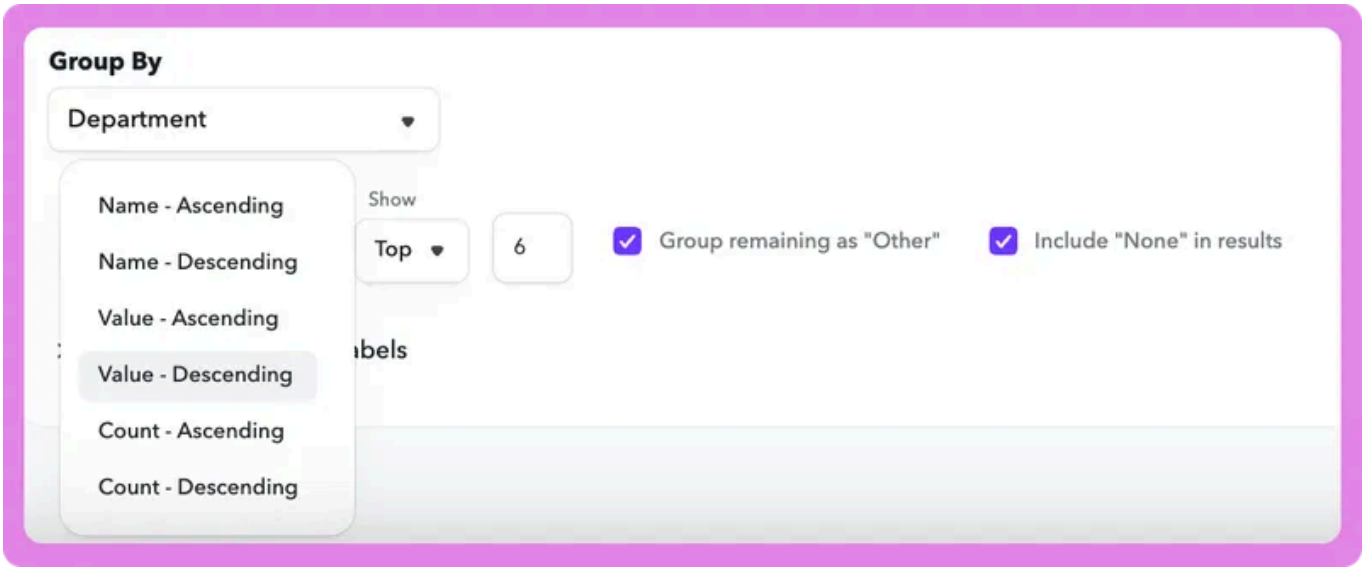
Add a chart to a dashboard

You can add as many charts as you want to your dashboard.

To add and configure a chart:

- Access your dashboard.
- Select **Add chart**.
- In the **Chart type** field dropdown, select the type of chart you want to create. **Learn more.**
    - You can select from the following options:
        - Timeseries:

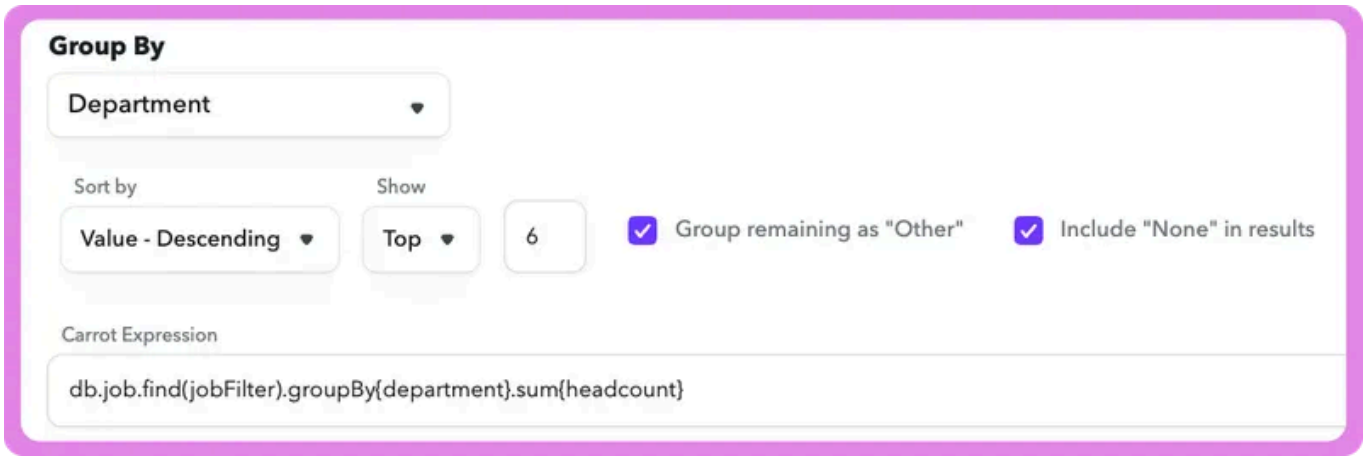
        - **Area chart**
        - **Line chart**
        - **Table**
        - **Vertical stacked bar chart**
    - Non-Timeseries:
        - **Single Metric**
        - **Horizontal bar chart**
        - **Pie chart**
        - **Table**
        - **Vertical bar chart**
- In the **Configure chart** section, define your **Y-axis** dropdown with the measures you want to include in your chart.
    - You can select from built-in and custom fields within the dropdowns.
    - You can also enter the name of a built-in or custom field to filter the dropdown list.
    - When a chart type includes a time series, the time period is automatically defined in the appropriate chart axis based on the time period you choose in the global filters.
- Select the value for how those measures are displayed (for example, Total, % Total, Min, Max).
    - The options available by default are based on the data type associated with the measure you select.
    - The **Format** field is also automatically defined based on the measure you select.
- (Optional) **Below the chart preview**, you can choose your **X-Axis** and **Group by** dropdowns, selecting additional measures to add more dimension to your data. For example, selecting **Department** displays the data in the chart grouped by department.
    - If you choose to add a measure in **Group by**, you can customize the colors, the labels, choose what order you want the data to display in, as well as displaying the top values, grouping remaining values as other, and including “None” in your results.



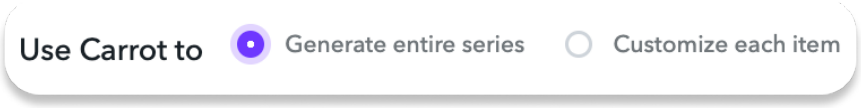
- (Optional) Select the **Show Date Range** checkbox to display the date range directly within the chart.
- (Optional) Select the **Show Data Labels** checkbox to display data labels directly within the chart.
- (Optional) Define the scale of your chart by entering the Min and Max values you want to use in the chart axis.
- (Optional) Select the desired format **Metric Format** box if you want data to display differently than the default.
- (Optional) In the **Tooltip decimal places** field, enter the number of decimal places to display for the values in your chart. You can select between 0 and 5 places.
- In the top right corner of the chart, select **Save & exit** to add the chart and return to the dashboard.
- (Optional) Repeat these steps to add additional charts.

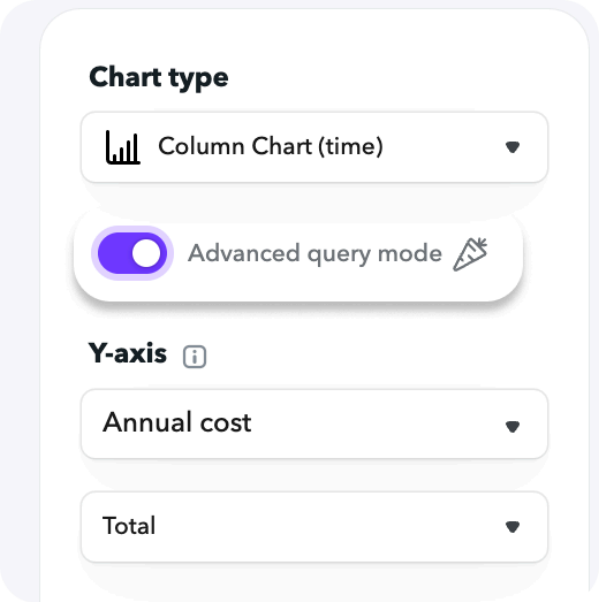
Customizing chart dimensions

You can use Carrot to customize the measures of a chart, which enables you to perform very detailed analyses of the data in your ChartHop org.



This feature is off by default. To turn it on, select **Customized (Advanced)** on the chart. For more information about Carrot, see Getting started with Carrot. [Learn more](#).





Once you've enabled Carrot, you can customize the current measures through Carrot expressions. You can also add a new value to the measures by selecting **Customize each item.**

Define the axis scale for a chart

You have the ability to define the Min and Max values that are used in the axis of your area, line, and bar charts. This helps with the readability of your charts and gives you more control over how you present your data.

By default, the axis scale is automatically determined based on the values of your data. However, you can enter a custom Min and Max value in the **Axis Scale** fields when you're configuring your chart to override those automatic values.

Axis scales are maintained when you export your chart. You can delete any values you have entered to return to the default axis scale values.



Display data labels in a chart

When you export a dashboard, exported charts display data labels depending on your configuration of the **Data Labels** checkbox.

When you hover over a chart, tooltips display data values with additional information. However, you have the option to display data labels directly within the chart so that you can see this additional information without hovering.

To automatically display data labels in a chart, check the **Data Labels** checkbox. You can check this option for all chart types except tables.

Display date ranges in a chart

To automatically display date ranges on a chart, check the **Date range** checkbox. You can check this option for all chart types.

For time series charts, or other charts that display data between two dates, it will display the range. For non timeseries charts, it will display the end date that the data is from.

Create a header to separate dashboard sections

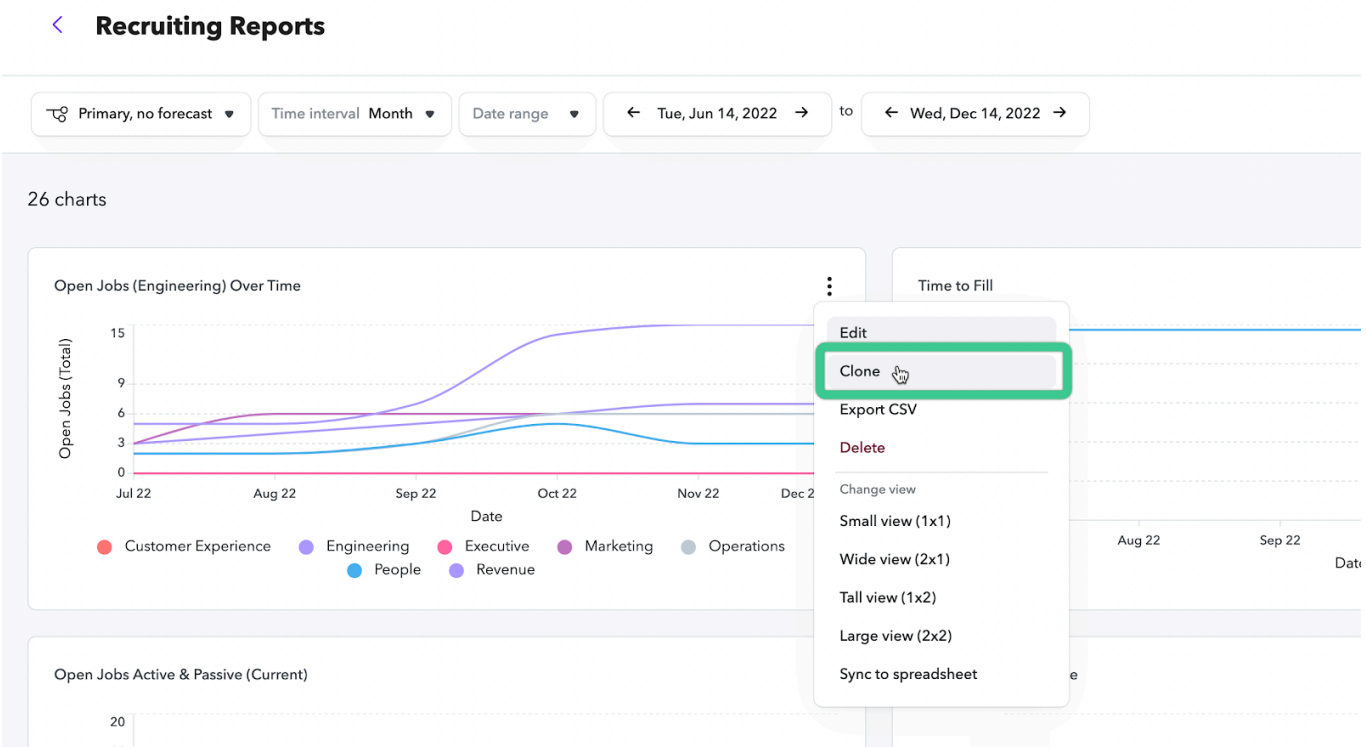
You can use headers to separate charts in your dashboard.

Learn more about them here.



Clone a chart in a dashboard

You can clone an existing chart by selecting the chart menu (⋮) and selecting **Clone**. When you clone a chart, all chart settings and filters are maintained in the duplicated chart.



Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.4.3. Chart types

Types of charts you can add to a dashboard

You can add the following types of charts to your dashboards:

- **Headers**
- **Timeseries** - These types of charts depict data over a period of time.
  - Area chart
  - Line chart
  - Table
  - Vertical stacked bar chart
- **Non-Timeseries** - These types of charts depict data at a specific point in time.
  - Single metric chart
  - Horizontal bar chart
  - Pie chart
  - Table
  - Vertical bar chart

Create a header to separate dashboard sections

You can use headers to separate charts in your dashboard.

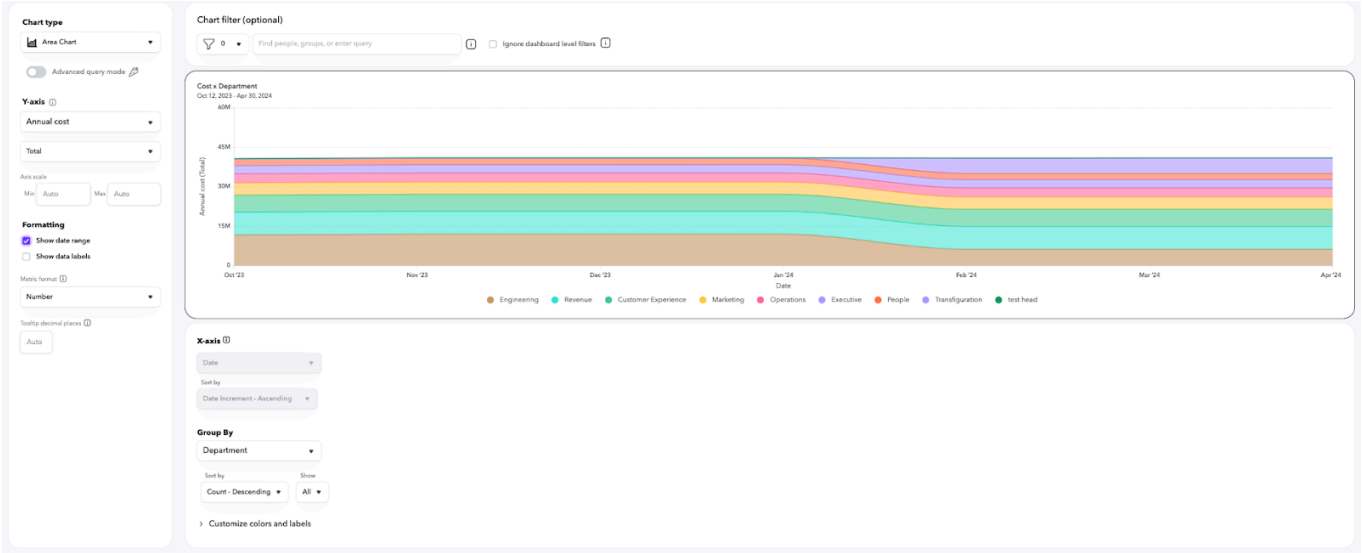
Learn more about them here.



Area chart

You can use an area chart to depict changes in a data measure over time.

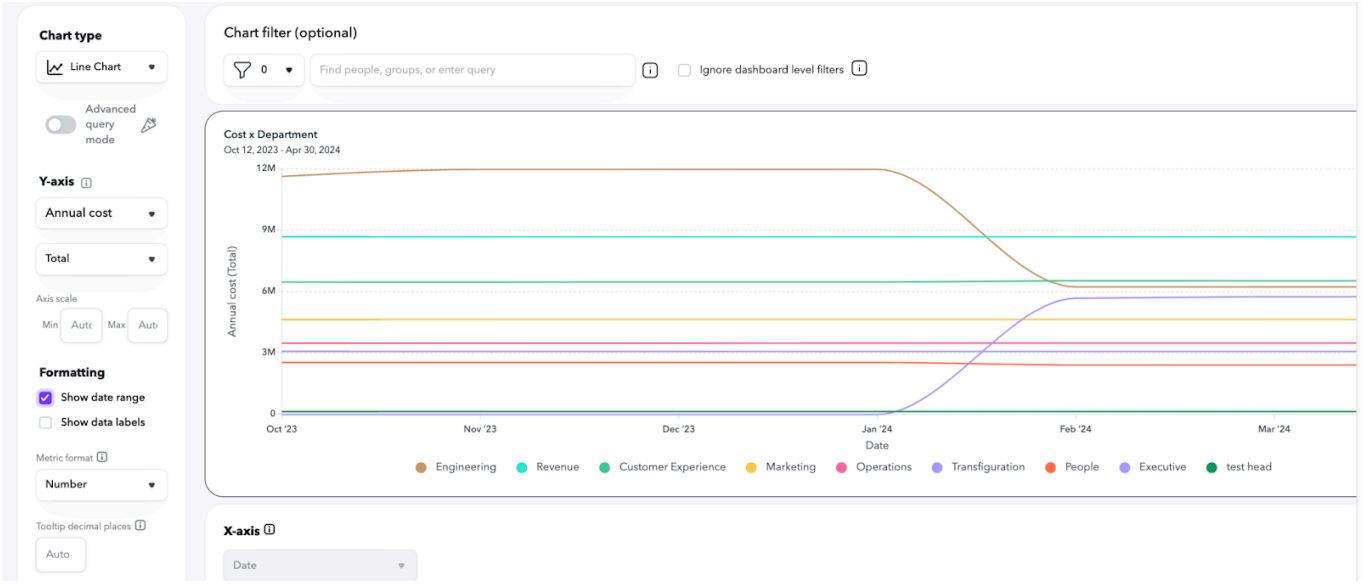
In an area chart, the **Y-axis** is set to a measure you choose from your built-in and custom fields. The **X-axis** is set to the time period you choose in the global filters. In the **Group by** dropdown, you can add an additional dimension to the chart (for example, group by department) for further comparison.



Line chart

You can use a line chart to depict changes in a data measure over time using a series of data points.

In a line chart, the **Y-axis** is set to a measure(s) you choose from your built-in and custom fields. The **X-axis** is set to the time period you choose in the global filters. In the **Group by** dropdown, you can add an additional dimension to the chart (for example, group by department) for further comparison.

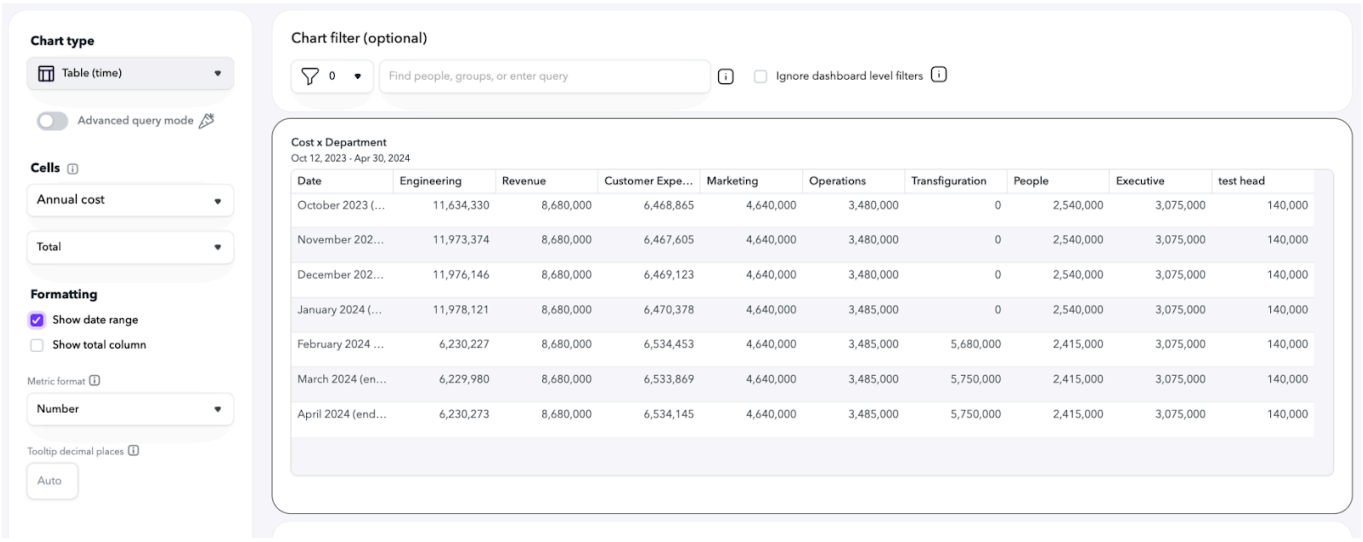


Table

You can use a table chart to display information for a measure in arranged columns and depict how this data changes over time.

In a table, **Cells** and **Columns** are set to the measures you choose from your built-in and custom fields. **Rows** are set to the time period you choose in the global filters.

You can select the **Show Total Column** checkbox to add a Totals column to your table.



Vertical Stacked Bar Chart

You can use a vertical stacked bar chart to depict changes in multiple series of data over time.

In this type of chart, the **Y-axis** is set to the measure you choose from your built-in and custom fields. The **X-axis** is set to the time period you choose in the global filters. In the **Group by** dropdown, you can add an additional dimension to the chart (for example, group by department) for further comparison.



Horizontal Bar Chart

You can use a horizontal bar chart to compare two different measures and depict those data points horizontally.

In this type of bar chart, the **X-axis** and the **Y-axis** are set to the measure(s) you choose from your built-in and custom fields. In the **Group by** dropdown, you can add an additional dimension to the chart (for example, group by department) for further comparison.

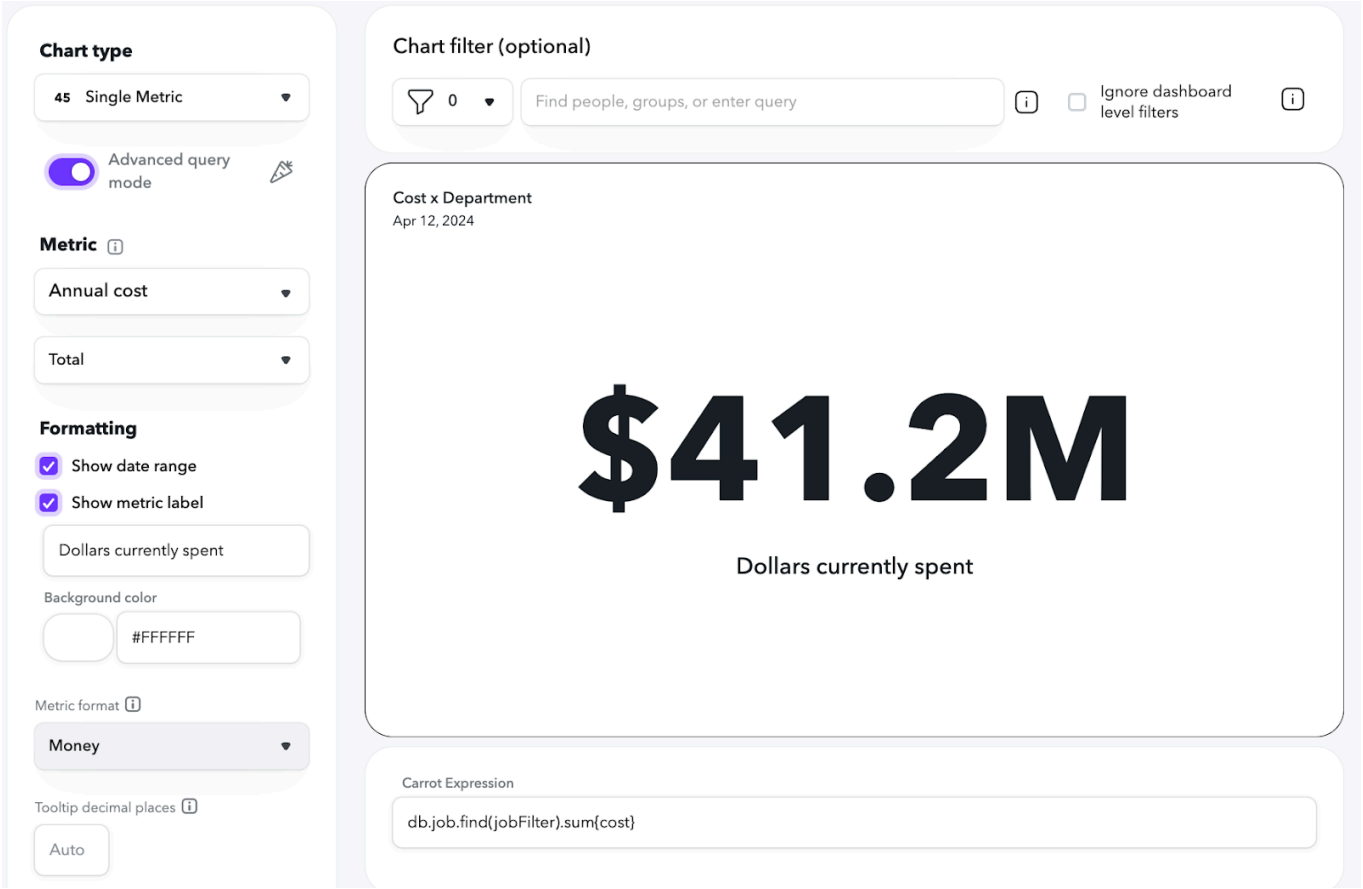


Single metric chart

You can use a single matric chart to display a numeric value from a date range.

In an area chart, the **X-axis** is set to the time period you choose in the global filters.

Watch a video for more here.



Pie chart

You can use a pie chart to visualize the different values of a measure and compare how they fit together as a whole.

In a pie chart, the **Measure** and **Slice** data points are set from the measures you choose from your built-in and custom fields. You have the option to select multiple pies to add an additional dimension to your pie chart data.

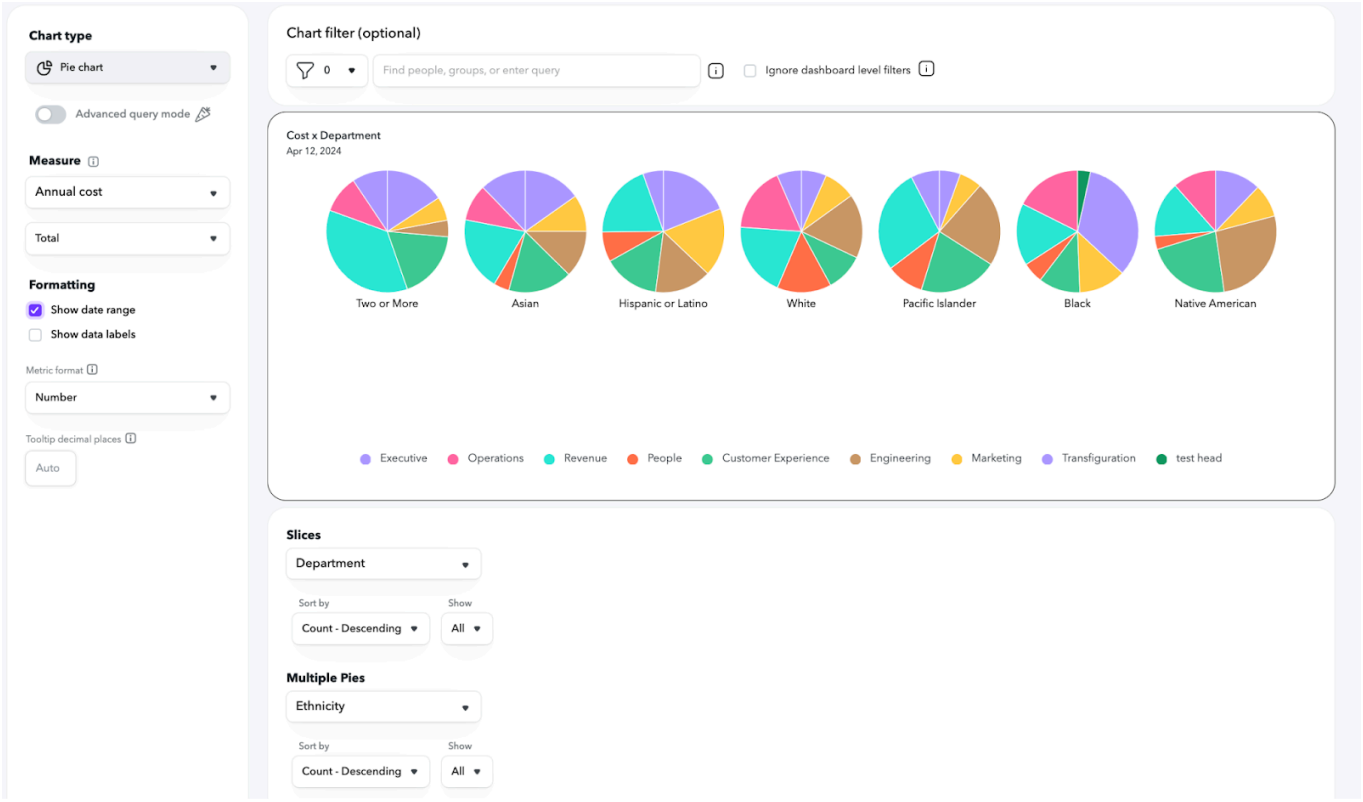
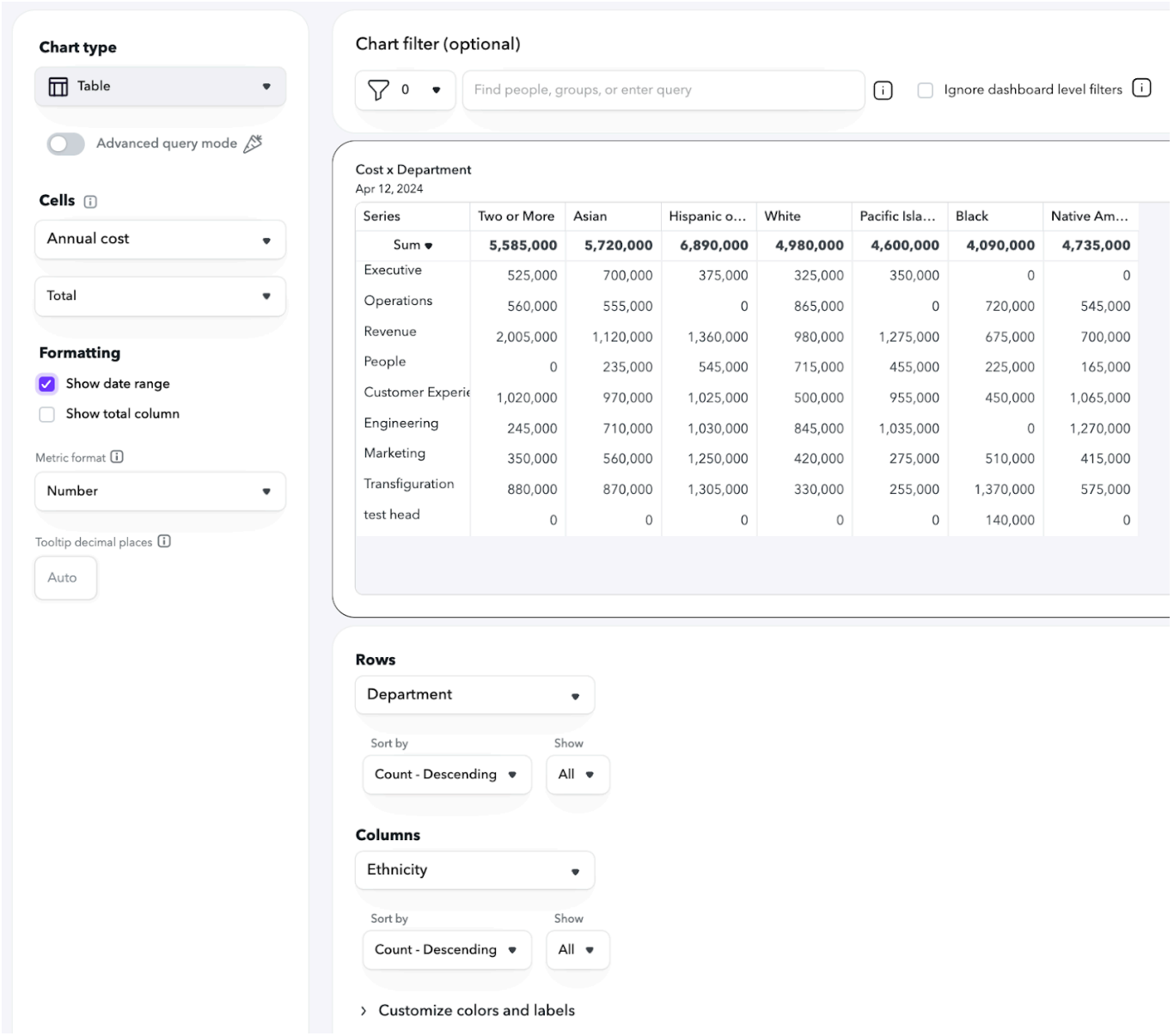


Table (Non-Timeseries)

You can use a table chart to display information for multiple measures in arranged columns and rows.

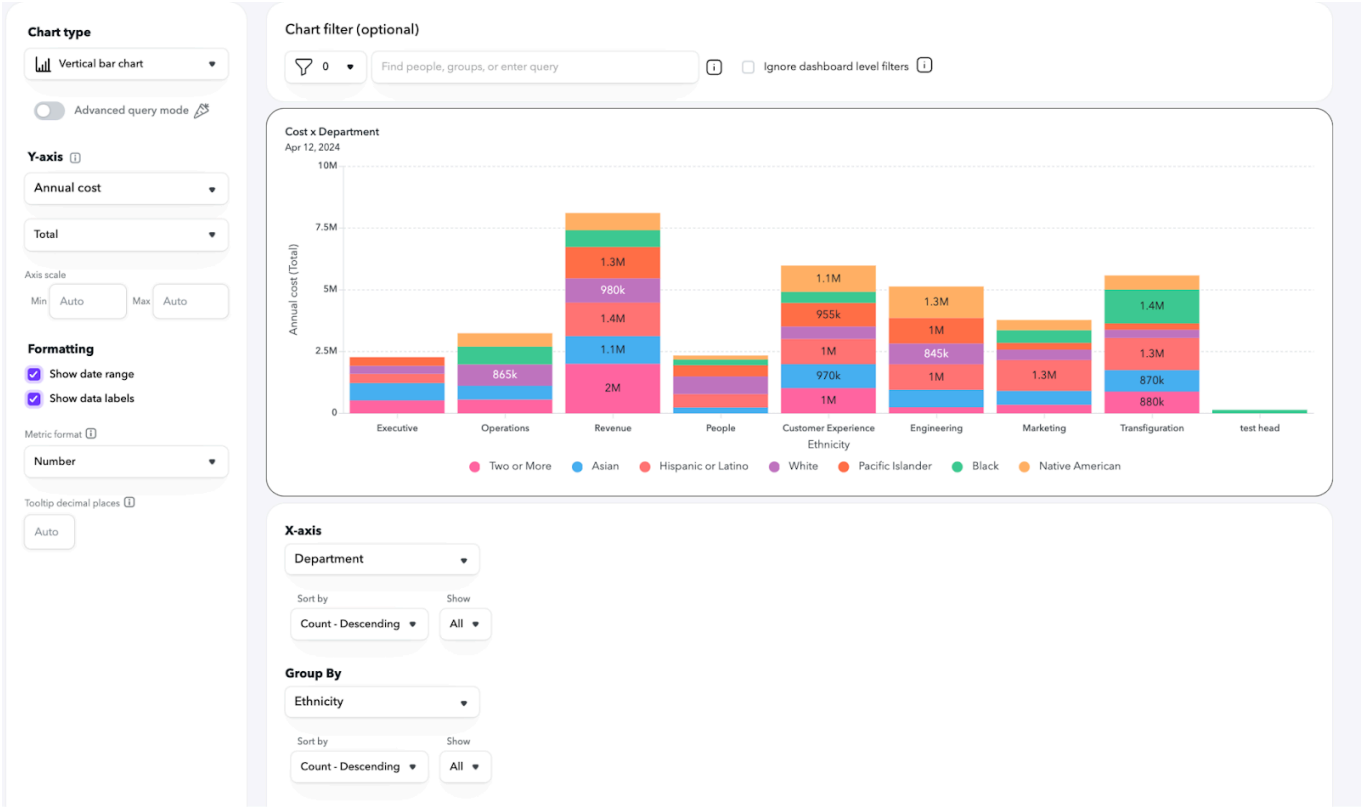
In a non-timeseries table, the **Cells**, **Rows**, and **Columns** are all set from the measures you choose from your built-in and custom fields.



Vertical bar chart

You can use a vertical bar chart to compare two different measures and depict those data points vertically.

In a vertical bar chart, the **Y-axis** and the **X-axis** are set to the measure(s) you choose from your built-in and custom fields. In the **Group by** dropdown, you can add an additional dimension to the chart (for example, group by location) for further comparison.



Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement** | **HRIS**

5.4.4. Advanced chart customization

You can utilize Carrot to customize your charts in addition to the dropdown menu.

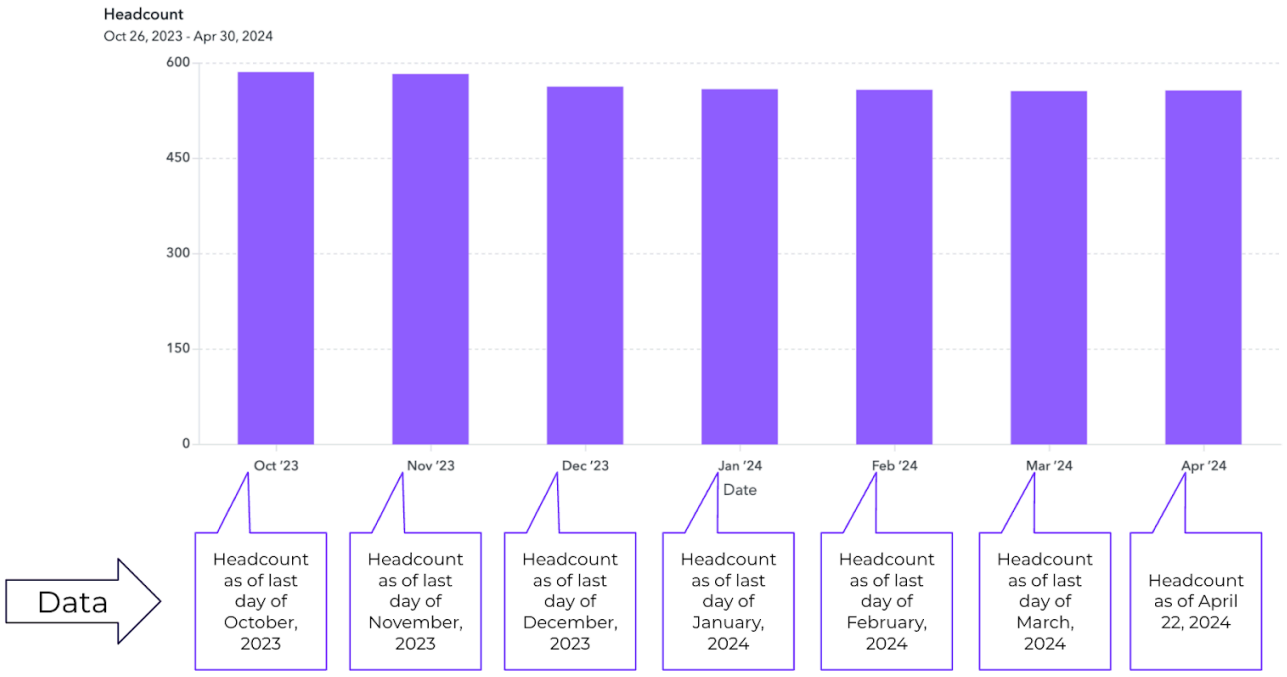
How ChartHop dashboards calculate data

When displaying data in charts, ChartHop uses the following Carrot time parameters:

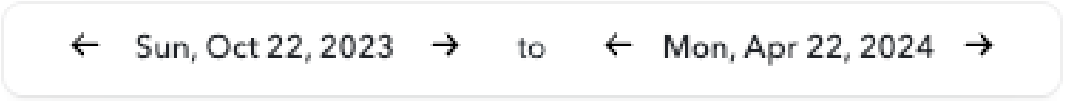
- **date:** Specific date
- **intervalFrom:** The start of the interval you want to look at (starting with the first date on the date range)
- **intervalTo:** The end of the interval you want to look at (end with the last date on the date range)

Change type queries are pulled for the entire interval, all others are counted at the end of the interval. If your dashboard date range ends before the end of the month, it will display the summed value for the last day specified in the date range. ChartHop will alert you when this is the case by displaying a partially filled circle on the last month.

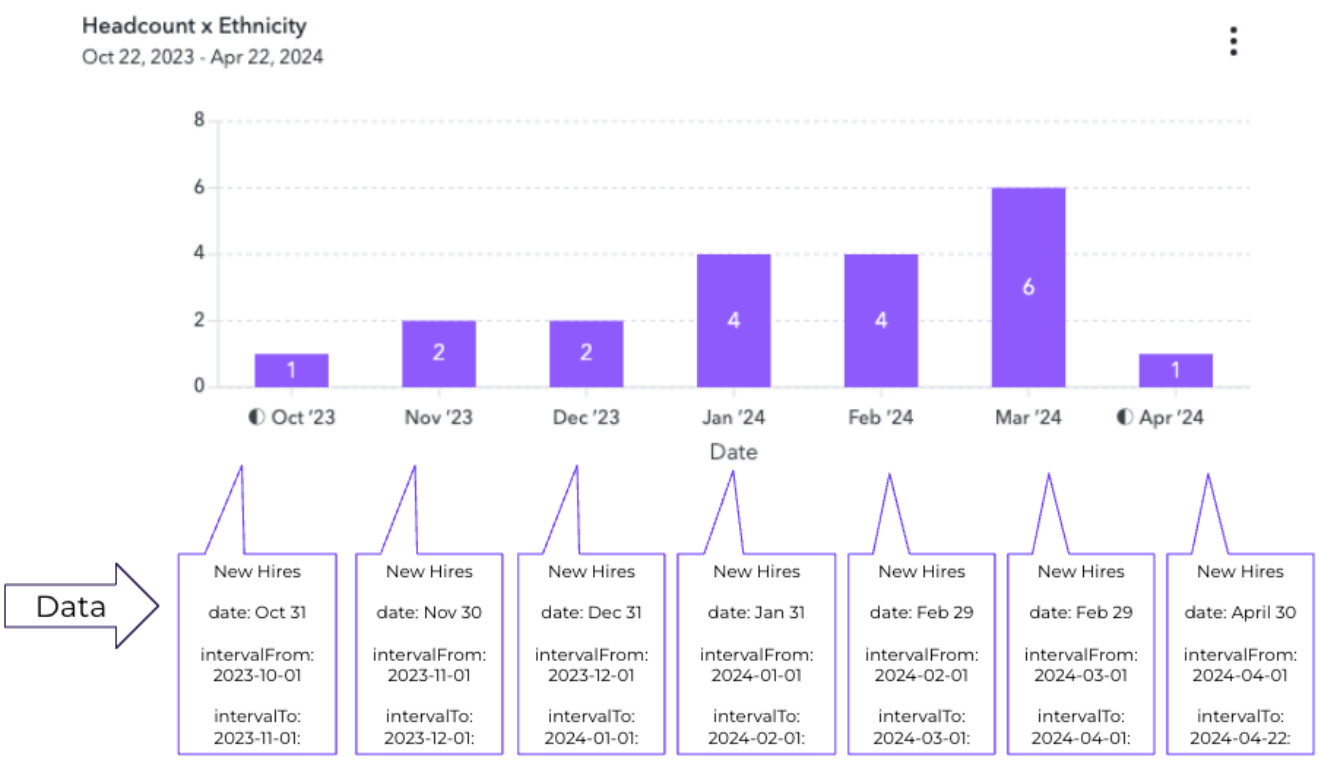




The date range on the dashboard is looking for data from October 22, 2023 - April 22, 2024.



Because headcount is not a change type query, and instead displays data as of the end of the month, there is no partial circle on “October ‘23”. In the chart below, we are looking at New Hires. Notice the partial circle on both “October ‘23” and “April ‘24”.



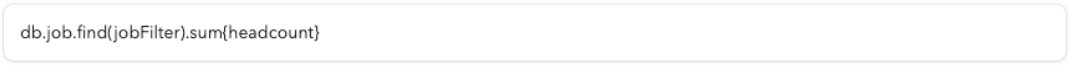
You can customize this chart by clicking the “Advanced Query Mode” toggle



Then, at the bottom of the edit chart modal, you can choose whether you want to customize the series, or customize each item.

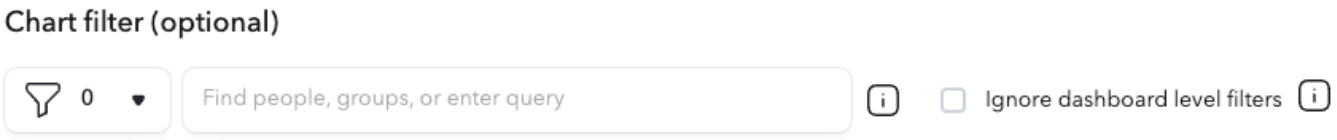


Both options will use Carrot **methods** that are chained together. Take a look at the Carrot filter box at the bottom of the edit chart modal:



If we break this expression down, we have the following:

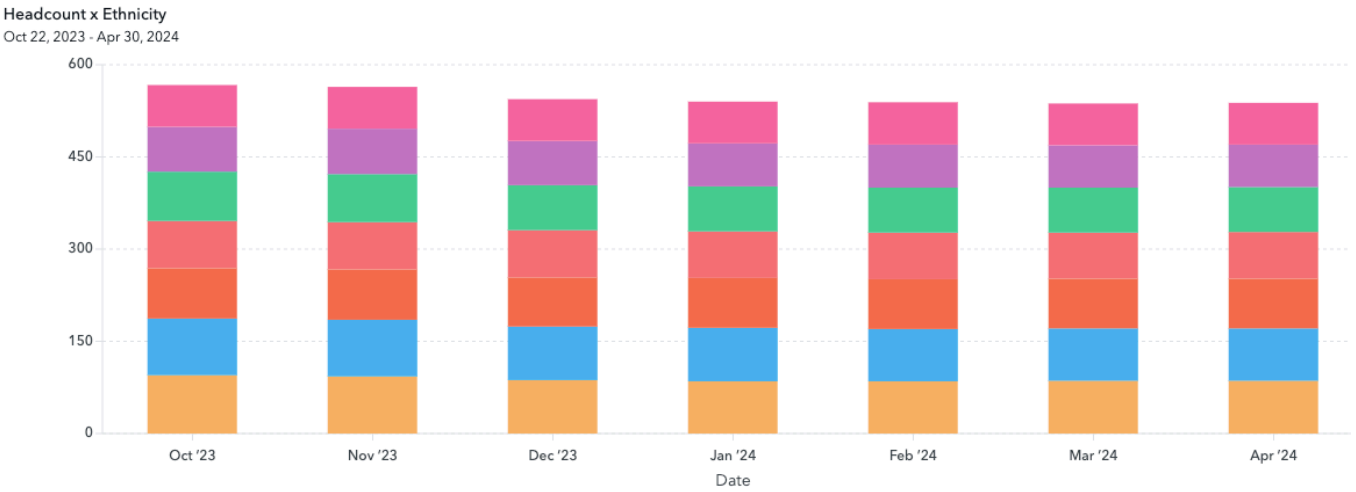
- **db.job.find** = look at jobs in the ChartHop database
- **(jobFilter)** = make sure to query any jobs that meet this specific criteria. This filter is found in the dashboard or chart level filters.



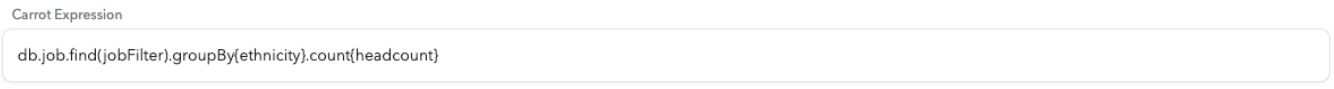
- **.sum()** = return the sum of entries for the field I'm looking at. Learn more about this and other methods here.

Grouping by values

groupBy allows you to view data by different variables. Below is a chart that looks at headcount by ethnicity, from October 22, 2024 to April 22, 2024.



Group by values are dynamic- as your departments and other values change in ChartHop, any chart that looks at that attribute will automatically update with new values.



For this chart, you can see we added the “groupBy” value. The chart is now displaying all jobs in the ChartHop database that meet the assigned filter, sorted by ethnicity.

Grouping by 2 values

You can group by up to 2 values in a non-time series chart. You would write that in the Carrot Expression like:

```
db.job.find(jobFilter).groupBy{expression1, expression2}.sum{}
```

For example, if you wanted to see headcount by gender and department:

```
db.job.find(jobFilter).groupBy{department, gender}.sum{headcount}
```

Grouping by persons

You can now group by persons as well. For example, if you wanted to see metrics by recruiter, you could write:

```
db.job.find(jobFilter).groupBy{recruiter}.count()
```

This will group by the recruiter field, therefore updating as recruiters move through your organization.

Common queries

We have simplified the syntax for our most commonly used queries. These work in other parts of the platform, like actions, profile tabs, and resources as well.

`findHires(fromDate, untilDate)` displays hires between the specified interval.

`findHires('2024-01-01', '2024-02-01')` returns all the hires that happened in the month of January of 2024.

You can chain methods with these functions as well:

- `findHires('2024-01-01','2024-02-01'.filter{dept:engineering}.count()` Returns the number of hires that happened in the month of January in the engineering department.
- `findDepartures(fromDate, untilDate)` - returns all departures within time frame
- `findMoves(fromDate, untilDate)` - returns all moves within time frame

- `findPromotions(fromDate, untilDate)` - returns all promotions within time frame
- `turnoverRate(intervalFrom, intervalUntil[, jobFilter[, depart filter][, groupBy])` -returns turnover rate for the start date to end date on your dashboard range

Other ways to apply the turnover rate function:

- `turnoverRate('-1y+1d', intervalUntil, jobFilter, null, {ethnicity})` - returns annual turnover rate for a year from the end date on your dashboard range, for the specified job filter, organized by ethnicity.
- `turnoverRate('-1y+1d', intervalUntil, jobFilter)` - returns annual turnover rate for a year from the end date on your dashboard range, for the specified job filter.

How we calculate turnover rate:

`turnoverRate('2023-01-01', '2023-06-01', jobFilter)`

- If headcount was 60 on 2023-01-01
- And headcount was 100 on 2023-06-01
- And 20 departures happened from 2023-01-01 through 2023-05-31
- Turnover rate will be 20/mean(60,100) = 20/80 = 25%

Querying form responses

You can pull form responses into a dashboard easily as well.

`findAnswers(questionId, fromDate, untilDate)`

findAnswers('downwardReviewRating', '2024-01-01','2024-02-01') returns the form answers to the question linked to the “downwardReviewRating” field that were submitted during the month of January, 2024.

You can chain these with methods:

`findAnswers('downwardReviewRating','2024-01-01','2024-02-01').mean{value}` returns the average downwardReviewRating score.

You can also utilize groupBy if needed:

`findAnswers('downwardReviewRating','2024-01-01','2024-02-01').groupBy{submitPerson.department.mean{value}}` returns the average downwardReviewRating score, grouped by the department of the person who submitted the form.

You can retrieve data from a specific assessment using findAnswers as well:

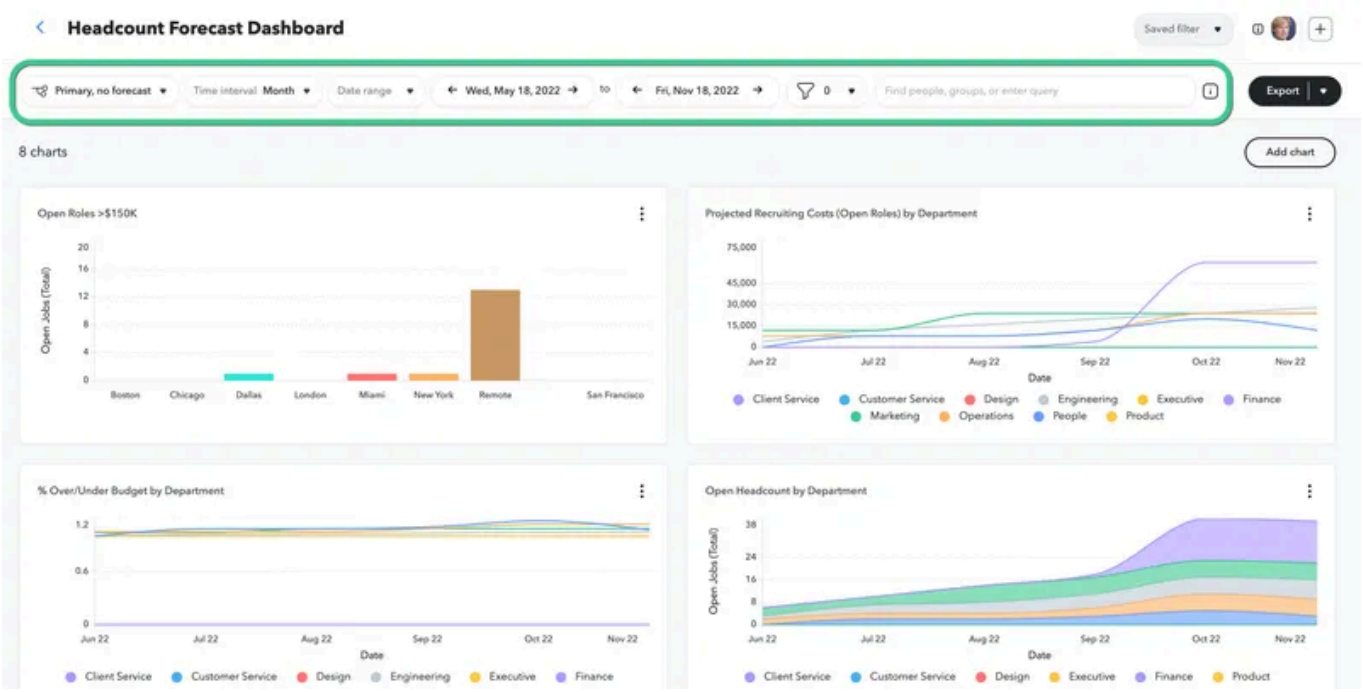
```
findAnswers(questionId, assessmentId, fromDate, untilDate)
```

Packages: Headcount Planning | Compensation Reviews | HRIS

5.4.5. Filtering data in a dashboard

You can decide which data is displayed in the dashboard by selecting whether the data is pulled directly from your primary organization or from a specific scenario. You can also apply additional filters to further refine the data that displays in your dashboard.

> By default, the filters that you select are applied globally to all charts unless you define chart-specific filters to override the ones defined at the dashboard level.



Filter global dashboard data

When you add a filter to dashboard data, that filter is applied to all charts (when they are not enabled to ignore dashboard filters). Filters are applied only in that instance and are not saved permanently. To save a filter, you must enter it into the **Saved filter** dropdown. Learn more.

To filter the data in a dashboard:

1. From the left sidebar, select **Dashboards**.
2. Open the dashboard you want to customize.
3. In the **Scenario** dropdown, select the data set used in the dashboard. You can select from the following options:

- **Primary, no forecast** – Calculates the dashboard using data from your primary organization.
- **Primary, with hiring forecast** – Calculates the dashboard using data from your primary organization, including projections based on new hires.
- **User's Scenario** - Calculates the dashboard using data based on a specific user's scenario proposal. Only scenarios you have permission to view display in the list. Learn more.
- **Compensation review** - Calculates the dashboard using data from the selected compensation review. Only compensation reviews you have permission to view display in the list. Learn more.

4. The **Time interval** dropdown, allows you to select how time is grouped together in the dashboard. You can select from the following options:
   - Week
   - Month
   - Quarter
   - Year
   - Fiscal quarter
   - Fiscal year
5. In the **Date range** dropdown, select a date range for the dashboard. The date ranges are based on the time interval you selected.
   - Alternatively, you can enter a custom date range by clicking on the listed dates.
6. Choose your filter options in the **Filters** dropdown menu or enter a Carrot query directly in the query box.

Save a dashboard filter

The dashboard filters you apply are only applied in the immediate instance and are not saved. However, you can save a filter so that you can easily apply it whenever you access your dashboard.

To save a filter:

1. From the left sidebar, select **Dashboards**.
2. Open the dashboard you want to view.

3. Select the **Saved filter** ▼ dropdown in the top right section.
4. Enter the Carrot query directly into the text box.
5. Select **Save**.
    - Your filter is saved as an option in the dropdown list.
    - When you access the dashboard again, you can select it from the dropdown and apply it without having to enter it again manually.

Filter chart data

You have the option to filter data at the chart level. Chart level filters are maintained and do not have to be reapplied.

> You must be a dashboard owner or have edit access to be able to edit and apply chart filters.

To filter the data in a chart:

1. From the left sidebar, select **Dashboards**.
2. Open the dashboard you want to customize.
3. Select the ⋮ menu for the chart you want to filter.
4. Select **Edit**.
5. Choose your chart filter options in the **Filters** dropdown menu or enter a Carrot query directly in the query box.
    - You can choose to ignore the dashboard-level filters by checking the **Ignore dashboard filters** checkbox.
6. Select **Save & exit**.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.4.6. Sharing a dashboard

You can share your dashboards with relevant parties.

To share your dashboard:

1. Select on the **+** icon at the top right corner of the page.
2. Type in the name(s) of the people you wish to share the dashboard with.
3. Set an access level per person.
    - **Owner** - access to view, edit, and share the dashboard
    - **Edit** - access to view and edit the dashboard (cannot delete or clone)
    - **View** - can only view the dashboard.
4. If you wish to make the dashboard accessible to Org members from the dashboards list page, update the **Dashboard sharing** field to reflect the desired level of access.
    - **Private** - the dashboard will only be shared with the named individuals above.
    - **Highly sensitive** - the dashboard will only be shared with the named individuals above **and** Org members with highly sensitive access.
    - **Org public** - the dashboard will be available to all Org members.
5. Set the **Data sharing** field.
    - **Normal** - Org members who view this dashboard will only see the underlying data that they have access to.
    - **Full** - Org members who view this dashboard will see all of the same data that the creator of the dashboard can see.
6. Remove a person from this list to stop sharing this dashboard with them.
7. Select **Done** to share the dashboard.

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.4.7. Duplicate, export, or delete a dashboard

You can duplicate a dashboard, create a copy of a dashboard owned by another user, export a dashboard to Powerpoint, or delete it. In each case, you use the **Export ▼** menu in the top right corner of the dashboard. You'll need to be a dashboard owner to perform these actions.

Duplicate a dashboard

You can duplicate a dashboard along with its data permissions and shared users if you want to create an exact copy to customize further.

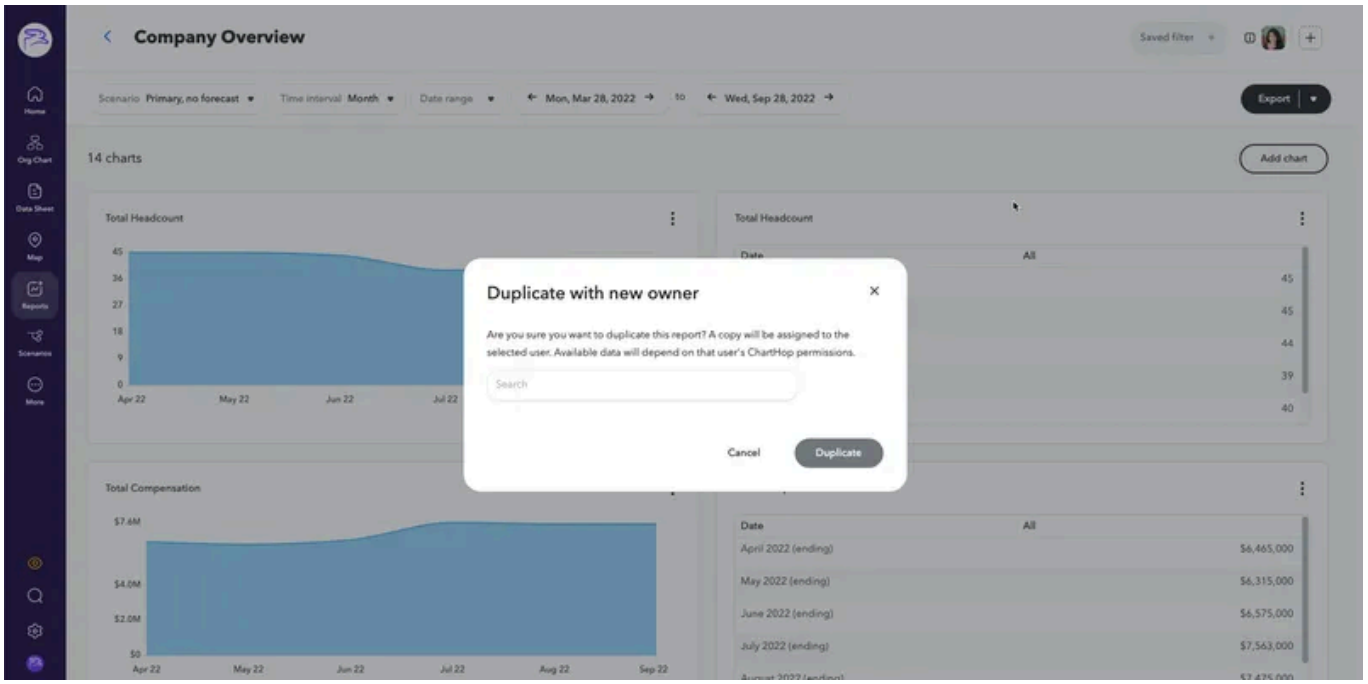
To duplicate a dashboard:

1. From the left sidebar, select **Dashboards**.
2. On the **Dashboards** page, select the dashboard to duplicate.
3. From the **Export ▼** menu in the top right corner of the dashboard, select **Duplicate**.
4. Select **Duplicate**.
   A copy of the dashboard is created.

Duplicate a dashboard to a new owner

You can duplicate a dashboard to a new owner, as long as you have ChartHop Org owner or Technical owner permissions. **Learn more**. One example of when you may want to do this is if the previous owner has left your org.

> When you duplicate a dashboard to a new owner, previous owners are copied to the new dashboard, but non-owners are removed. The dashboard's available data is based on the new owner's ChartHop permissions.



To duplicate a dashboard with a new owner:

1. From the left sidebar, select **Dashboards**.
2. On the **Dashboards** page, select the dashboard to clone.
3. From the **Export ▼** menu in the top right corner of the dashboard, select **Duplicate with new owner**.
4. In the dialog that appears, search for the new owner to assign.
5. Select **Duplicate**.
   A copy of the dashboard is assigned to the new owner.

Export a dashboard

You can export a dashboard as a Powerpoint file. When you export a dashboard, each section is displayed on a separate slide.

To export a dashboard:

1. From the left sidebar, select **Dashboards**.
2. On the **Dashboards** page, select the dashboard to export.
3. In the top right corner of the dashboard, select **Export**.
4. In the dialog that appears, select **Download**.
   A Powerpoint file is downloaded to your computer.

Delete a dashboard

If you're the owner of a dashboard, you can delete it from ChartHop. This action cannot be undone.

> Be careful when deleting dashboards! In most cases, removing users from a dashboard is sufficient—and does not remove the dashboard.

To delete a dashboard:

1. From the left sidebar, select **Dashboards**.
2. On the **Dashboards** page, select the dashboard to delete.
3. From the **Export ▼** menu in the top right corner, select **Delete**.
4. In the dialog that appears, type `DELETE`.
5. Select the **Delete** button.
   The dashboard is deleted from ChartHop.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5. Planning

Scenarios

Understand how to propose org changes with scenarios.

Headcount planning

Learn about creating headcount plans.

Compensation bands

Set up compensation bands for your organization.

5.5.1. Scenarios

ChartHop *scenarios* help you visualize potential changes to your organization so that you can project and analyze the costs and impact of those changes before putting them into effect.

When you create a scenario, you create a proposal in which you can collaborate with other stakeholders (such as leadership team members or HR business partners) for better transparency.

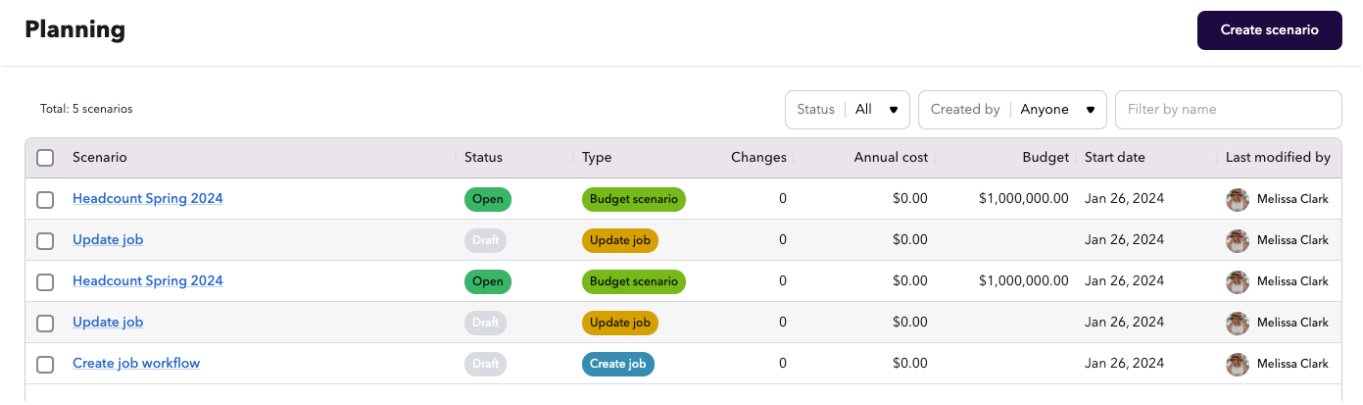
You can use scenarios to plan potential changes to the hiring plan, backfills, promotions, organizational structure, or all of the above.

> Any changes you propose in a scenario (including new jobs, reorganization, and terminations) are contained within the scenario and only you as a scenario owner have access to those proposed changes. You can share a scenario with others and control the level of permissions they have to view and edit your scenario.
>
> Your scenario and all changes within the scenario are not visible to the rest of your organization or put into effect until the scenario is merged to Primary. **Learn more.**

Access scenarios

To access scenarios, select **Planning** from the left sidebar.

You can view an existing scenario or select **Create Scenario** to create your own. The list displays only scenarios that you've created or that have been shared with you.

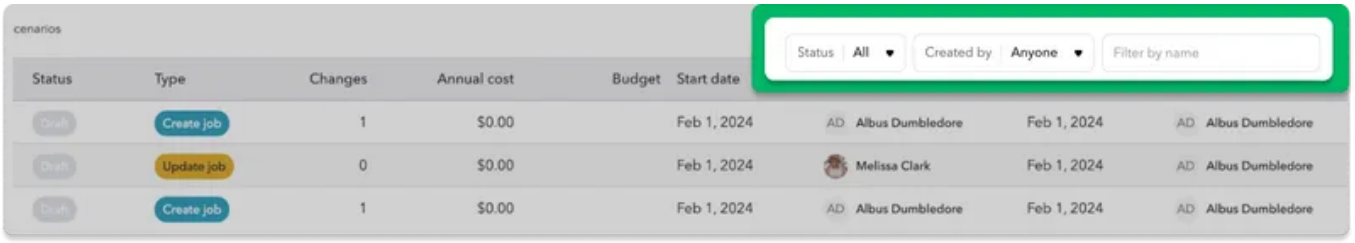


Scenarios List

Filter the list of scenarios

You can also filter the scenarios that display on any of these tabs by the following:

- **Created by** - Choose **Anyone** to view all scenarios you have access to, regardless of who created it, or choose **Me** to view only scenarios you've created. You can also select the name of another employee.
- **Review status** - Filter the scenarios that display based on review status.
- **Keyword** - Filter the scenarios that display by entering specific keywords.



Scenarios Filtering

Approvals for scenarios

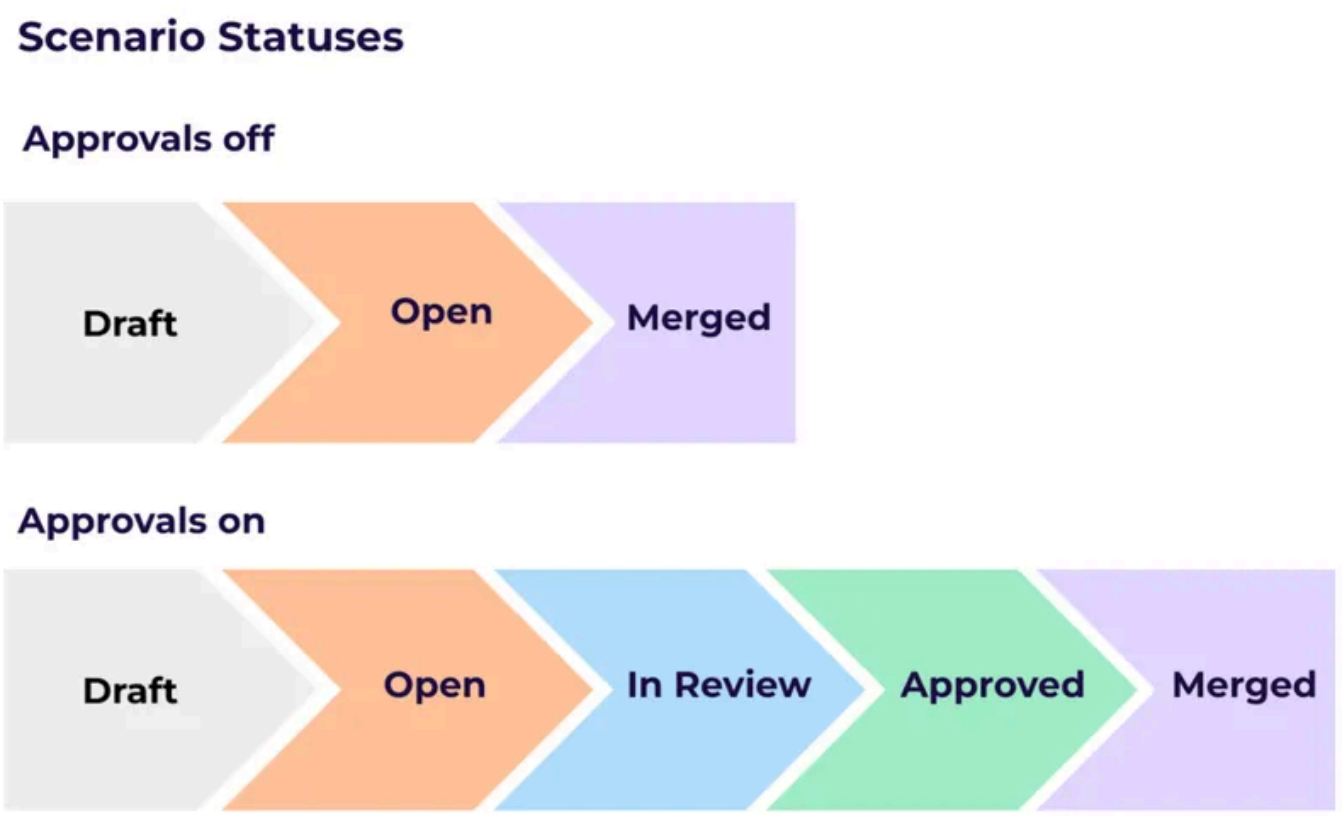
Depending on your organization's settings, you may be required to send your scenario for review and approval before any changes can be made official.

Once a scenario has been approved, scenario changes can be merged into your organization's primary **Org Chart**.

> If you are merging data that is also updated by your HRIS, if you merge the changes before you have updated your HRIS the data will be overwritten in the next days sync. We recommend that you merge your scenario and change the data in your HRIS on the same day to avoid this.

Statuses for scenarios

The status of your scenario lets you know where your scenario is in the review process (when approvals are enabled) and whether it has been merged.



Your scenarios can display with the following statuses:

Status	Description
Draft	Indicates the simple workflow scenario is currently being edited.
Open	Indicates the scenario is currently being edited.
In review	Indicates the scenario is currently under review by one or more approvers. This status displays only when Approvals are enabled. **Learn more.**
Approved	Indicates the scenario has been approved but has not been merged to primary.
Rejected	Indicates the scenario has been rejected by at least one approver and the collaborators of the scenario have not yet made any additional edits.
Merged	Indicates a scenario has been approved and merged to primary.
Archived	Indicates a scenario has been archived. Merged scenarios cannot be archived.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.1.1. Create a scenario

ChartHop gives you the ability to create different types of scenarios for the changes you're proposing to your organization.

Any employee can create a scenario and edit scenarios shared with them. The data they see is governed by their access role. For example, if someone has the Employee role and is a manager they will be able to see the compensation for their direct reports. If they do not have a role that allows them to see compensation, no compensation data is shown.

Keep in mind that a scenario is private to the user who creates it until they share it.

> When you assign the **full data access** permissions to someone, you give them full access to all the changes to data in the scenario, which could potentially include sensitive information (such as compensation) depending on your ChartHop access role. ChartHop recommends only assigning those permissions to individuals who regularly have access to highly sensitive information. **Learn more.**

To create a scenario:

1. From the left sidebar, select Planning.
2. Select Create Scenario.
3. Select the type of scenario you want to create:

    - **Simple Workflows** - Simple workflows are guided workflows for a change to a singular person or job.
        - **Create Job** - Create a new job
          Data Required: Manager, Title
        - **Update Job** - Choose from a dropdown menu of existing and open jobs (active and inactive) to edit
          Data Required: A change must be made to any filled-in fields, fill in an empty field, or remove a value from a field.
        - **Terminate job** (with or without a backfill) - Terminate a job, set termination reasons, and determine and edit backfill details.

Data Required: Termination date, announce date, choose backfill or not

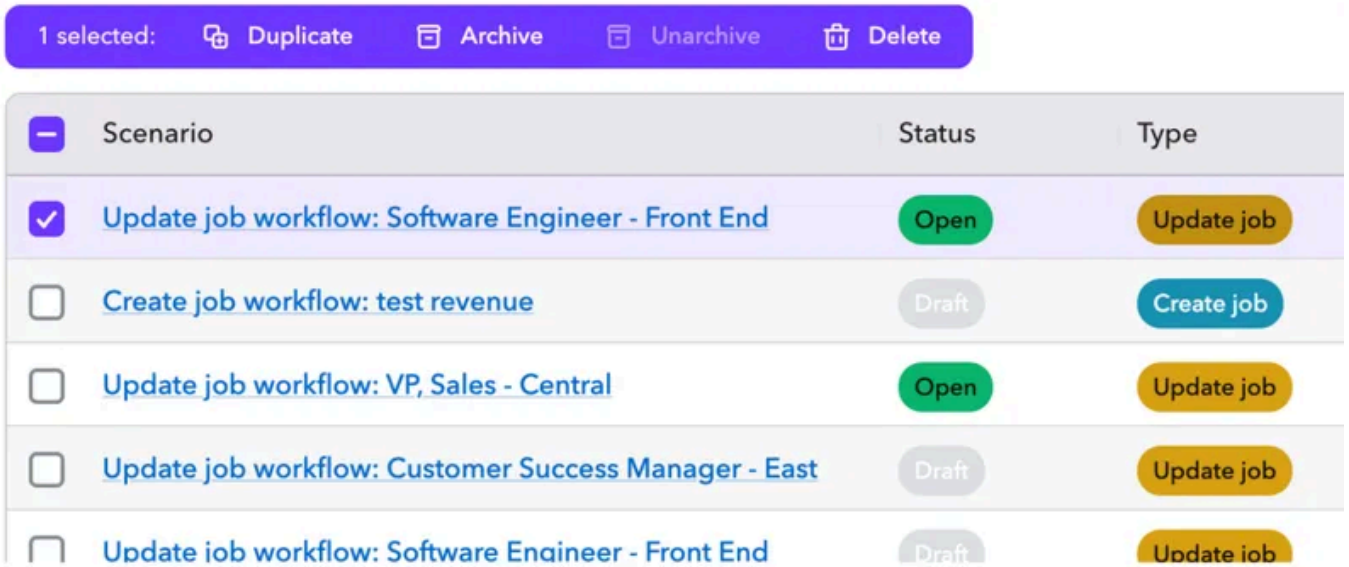
- **Other Scenario Types**
  - **Promotion Planning**- Use this type to propose title and promotion changes in an organization. When you use this scenario type, the scenario automatically generates blank change fields for the group of people you indicate in the Planning for the field.
  - **Budget Scenario** - Plan with a budget to meet a set budget. This scenario type is only available to the following roles: Cash Compensation Viewer, Equity Compensation Viewer, Compensation Viewer, Org Editor, People Ops Admin, and Owner.
  - **Custom Scenario** - Propose multiple organization changes (for example, hiring and reorganization).

4. In the New Scenario dialog, enter information about your scenario:
   Scenario name - The name of the scenario (for example, Q4 Hiring Plan).
   Start date - The date when the changes proposed in the scenario are intended to go into effect. This can be either the current date or an exact date.
   Planning for - Filter to display the group of people whose roles you're editing. This field displays only when you select the Promotion Planning scenario types.
   Description - A description of the scenario.
5. Select Create.

Copy a scenario

As a scenario owner, you can copy one of your other scenarios, including all of its changes, when you want to create an exact copy to customize further.

You can copy scenarios that are currently In Progress and Archived. You can’t copy scenarios that have already been merged.



To copy a scenario:

1. From the left sidebar, select **Planning**.
2. Select **Create Scenario**.
3. Navigate to the scenario you want to copy.
    - Depending on the scenario status, it may be located on the **In Progress** or **Archived** tabs.
4. Select the checkbox next to the scenario you want to copy.
5. In the menu that displays above the Scenarios list, select **Copy**.
6. Enter the Scenario name, Start date, Scenario type, and Description for the copied scenario.
7. Select **Create**.
    - A copy of the scenario is created.
    - If you are copying a **Simple Workflow Scenario**, the copy will be saved as a **Custom Scenario**.

> When you copy a scenario, sharing permissions are not copied over to the new scenario. If you're collaborating with others in the scenario, you'll have to re-share the scenario and establish new scenario permissions. Learn more.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.1.2. Propose changes in a scenario

Once you've created a scenario, you can propose changes without affecting your primary organization in ChartHop. For example, you can add and remove jobs, move people to different managers, and plan for promotions while being able to see the structural and financial impact of your proposed changes.

The number of new jobs added and the projected annual cost of your changes are summarized at the top of the screen.

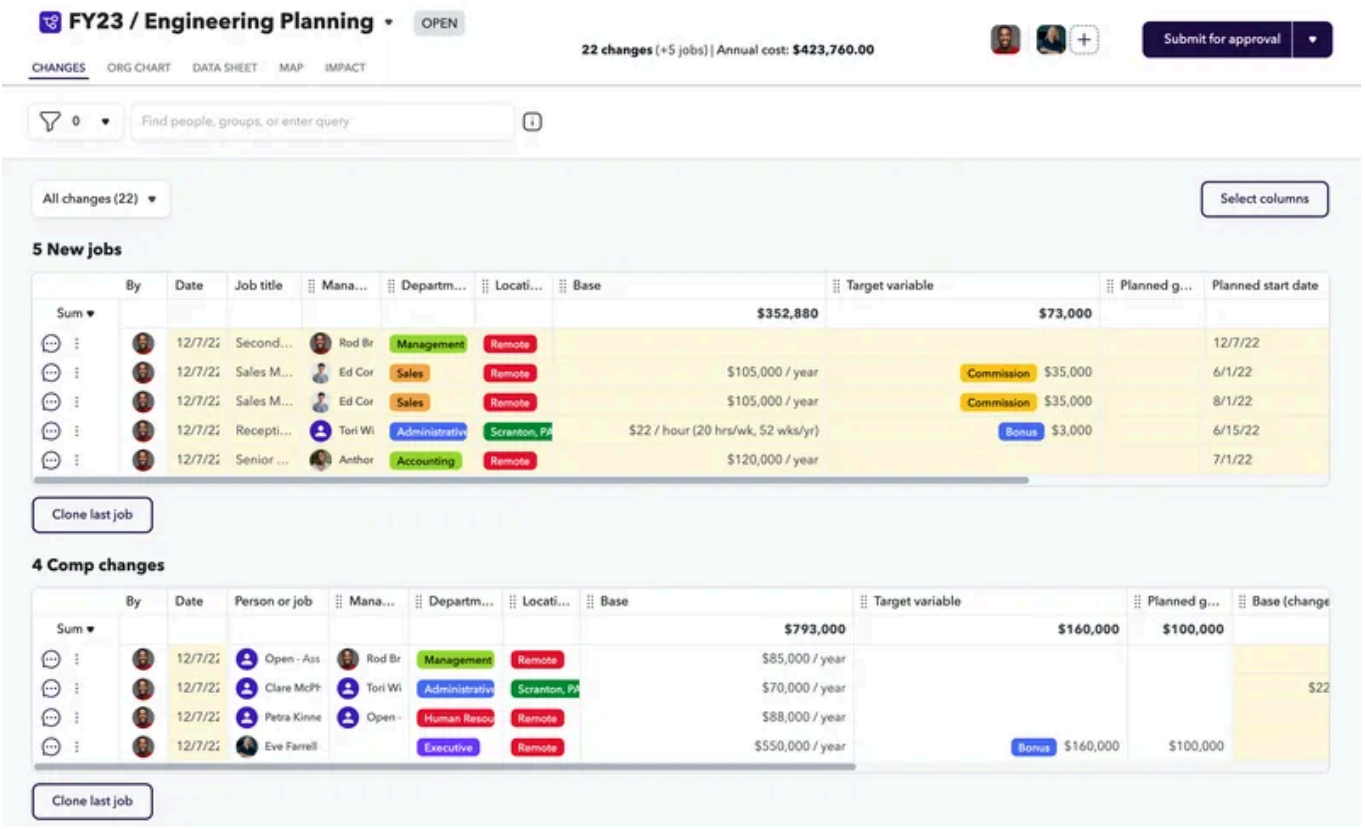
You use the following tabs when working in a scenario:

- **Changes**
- **Impact**
- **Org Chart**
- **Data Sheet**
- **Map**

The **Org Chart**, **Data Sheet**, and **Map** tabs display your organization as it would appear were the proposed changes to be enabled and put into effect.

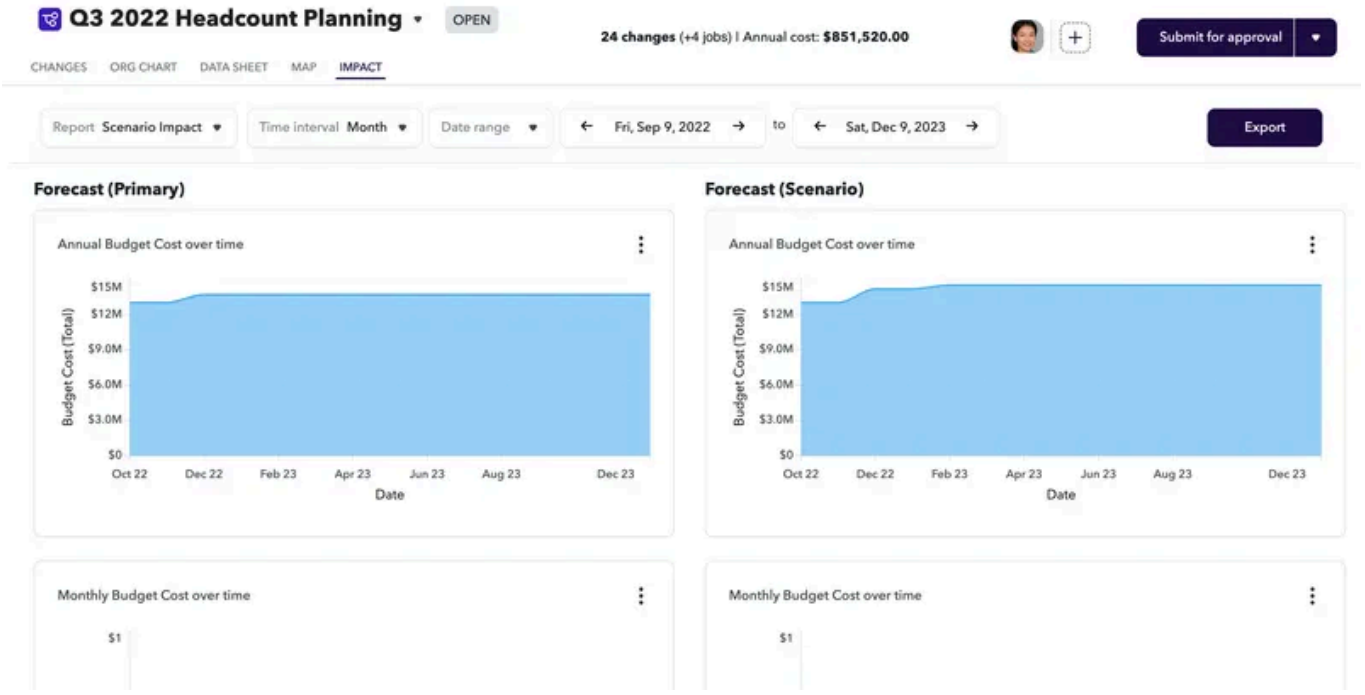
Changes tab

As you make changes within your scenario, each change is reflected in the **Changes** tab. This tab displays a summary of all the changes you have made to your organization in the scenario, making it easy for you and any approvers to review everything at once.



Impact tab

On the **Impact** tab, you can pull in pre-configured reports to make sure that the changes you've made to your ChartHop organization are in line with projected goals. Reports display side by side to show both the primary and scenario situations.



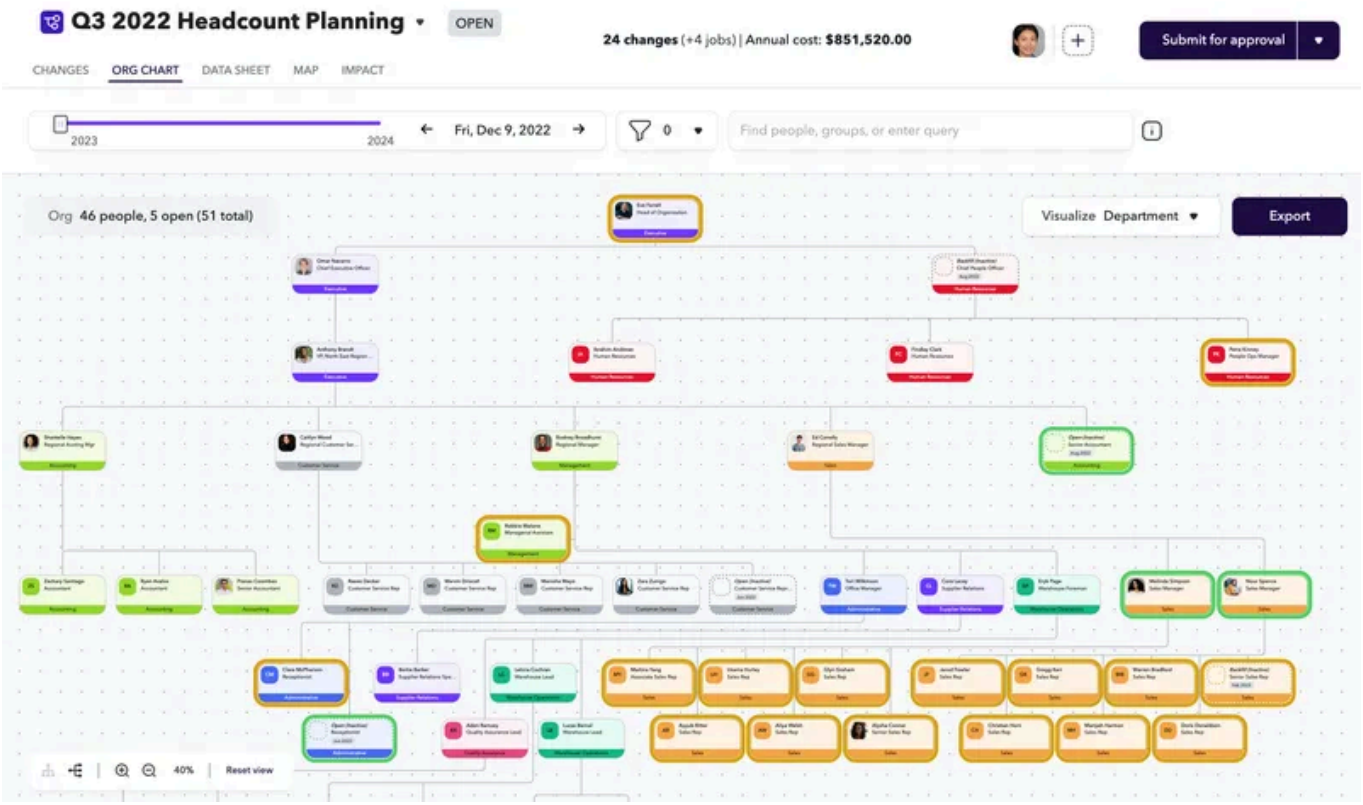
You can also see the impact of your scenarios directly within a specific report. While accessing a report, use the **Scenarios** dropdown to select a scenario and see how specifically that scenario would affect the data in the current report. Learn more.

Org Chart tab

The **Org Chart** tab gives you all the capabilities of the standard **Org Chart**, but without committing any of your changes. You can use this tab to add and remove jobs, edit roles, and generally reorganize your ChartHop organization within a visual format. Learn more.

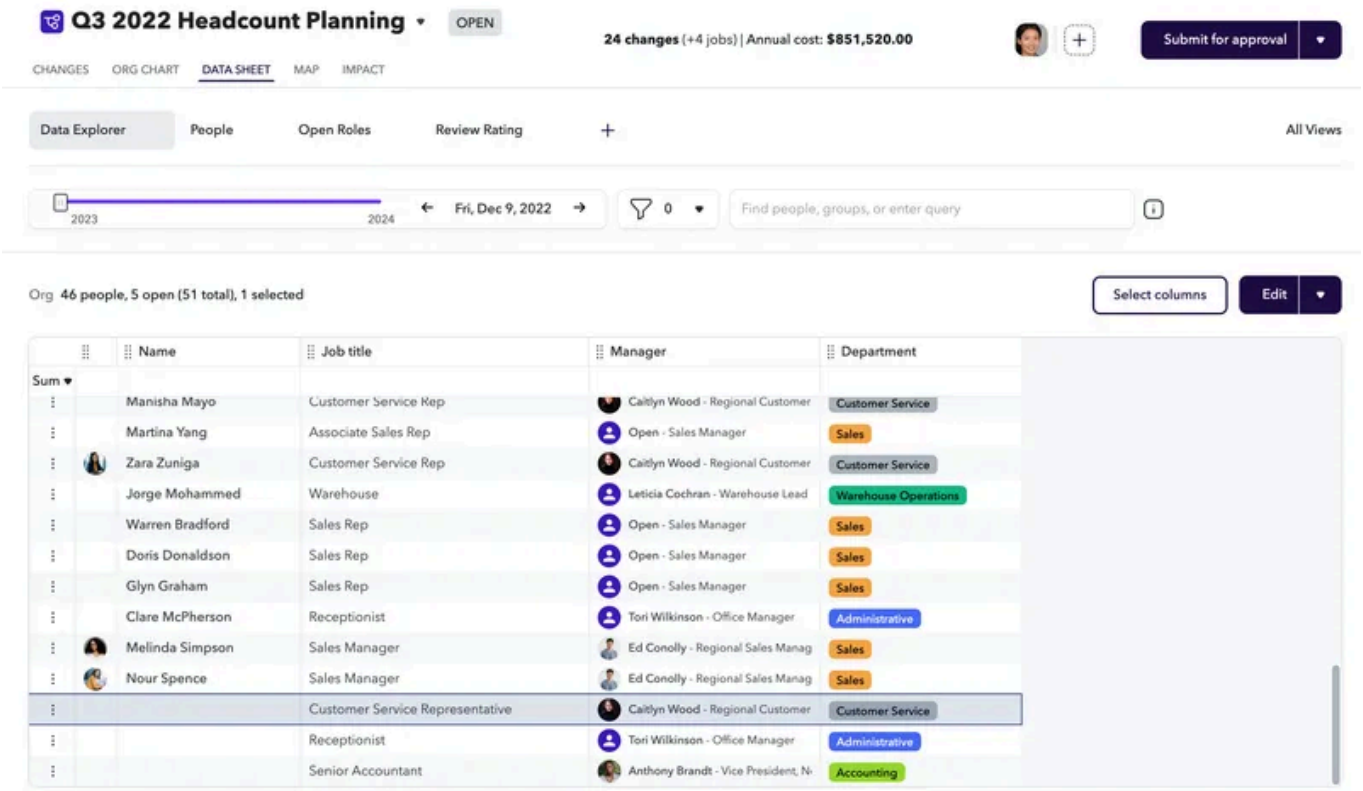
Any nodes you move or add are highlighted within the **Org Chart** to make those changes easier to identify. Depending on your changes, nodes can display in the following highlighted colors:

- **Purple** - Indicates this is the currently selected node.
- **Green** - Indicates this is a new job that you've created.
- **Yellow** - Indicates you've edited or moved this job or the person in the job.
- **Red** - Indicates you've terminated this job.



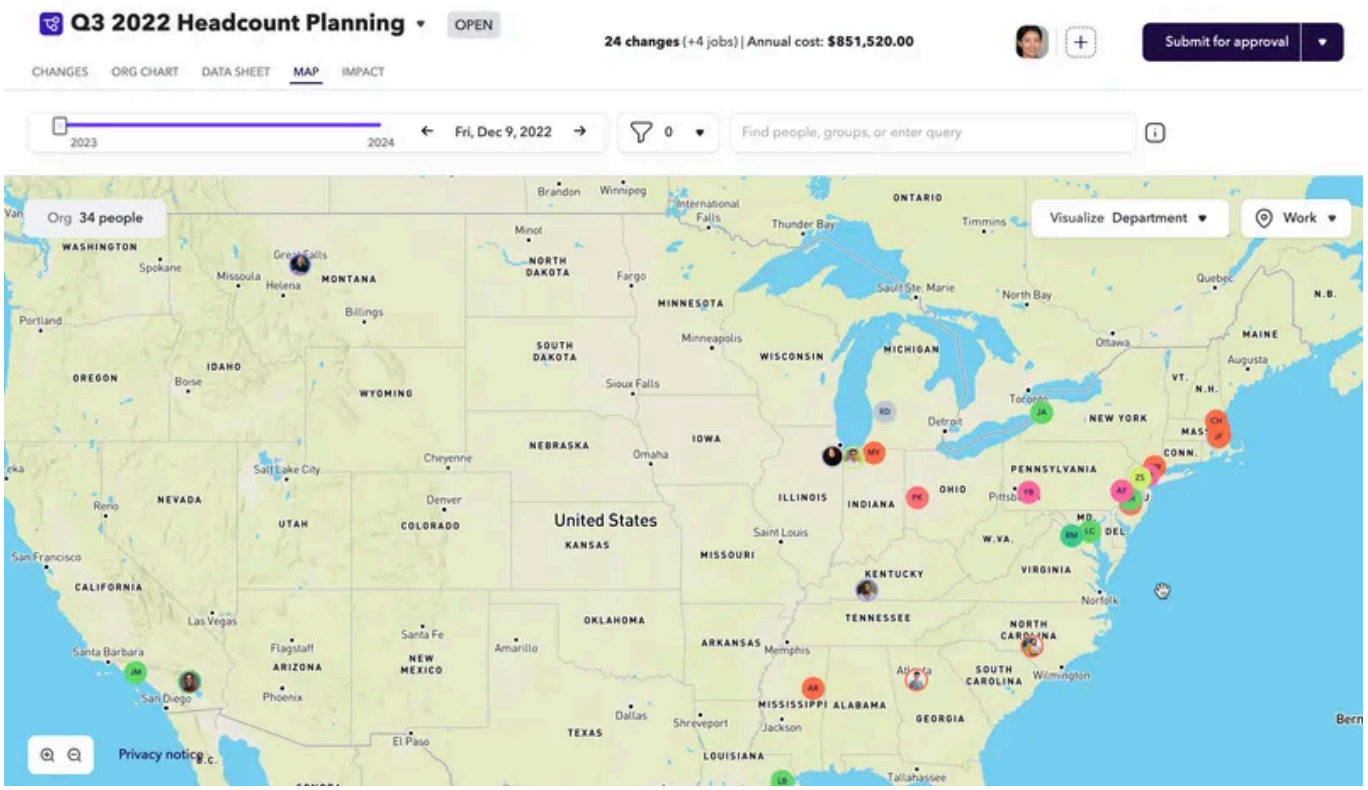
Data Sheet tab

The **Data Sheet** tab gives you the full power of the **Data Sheet**, without permanently committing any of your changes. You can use this tab to filter data, create different views, and freely make changes within the instance of your scenario. **Learn more.**



Map tab

The **Map** tab lets you visualize your proposed changes over a global map. As you change data in a scenario, the map will accurately reflect your changes. **Learn more.**



Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.1.2.1. Managing proposed changes in a scenario

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

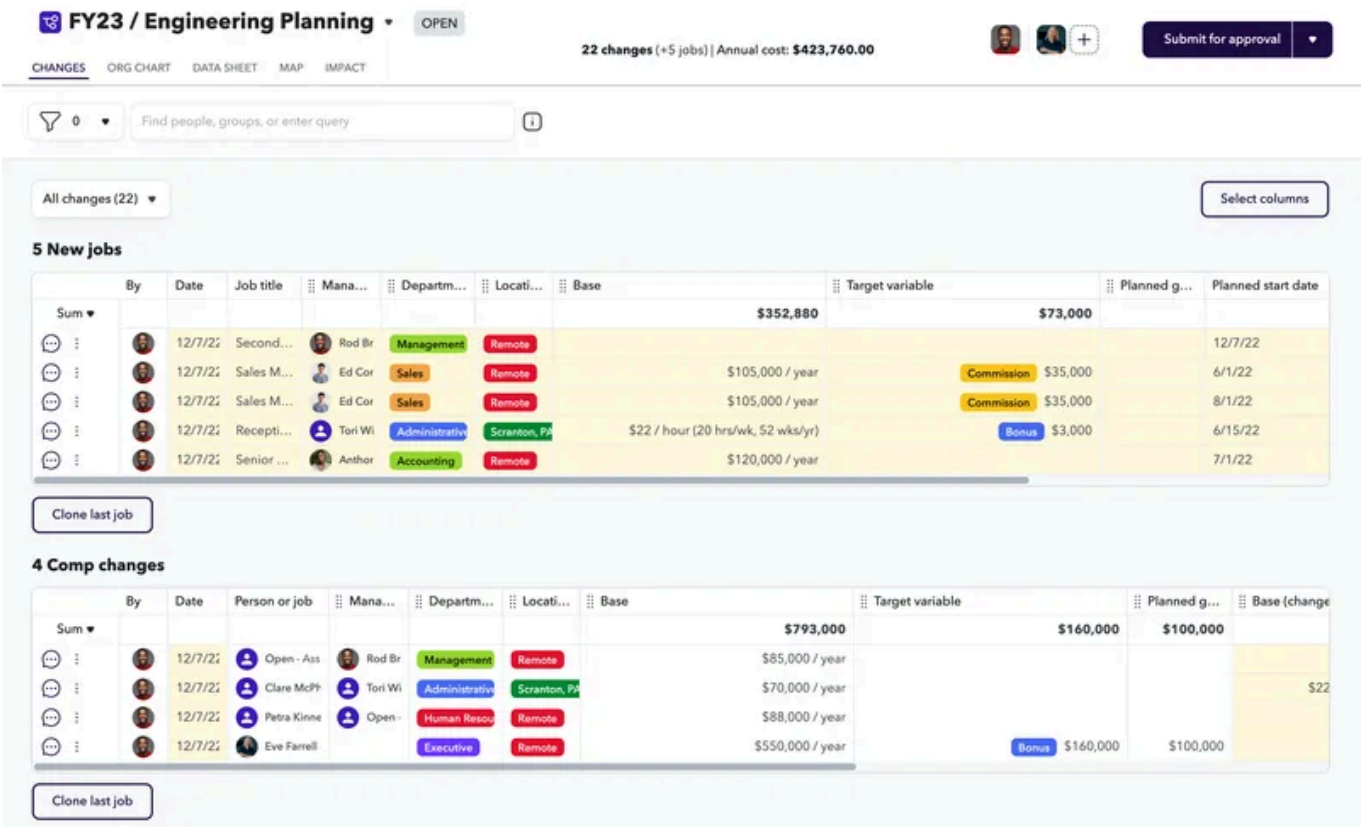
Roles: Recruiting editor | Owner | Technical owner

Every change you make in a scenario is added and organized into separate tables within the **Changes** tab. These tables display a complete summary of all the changes you have proposed for your organization in the scenario.

Changes are categorized into the following tables based on the type of change you propose:

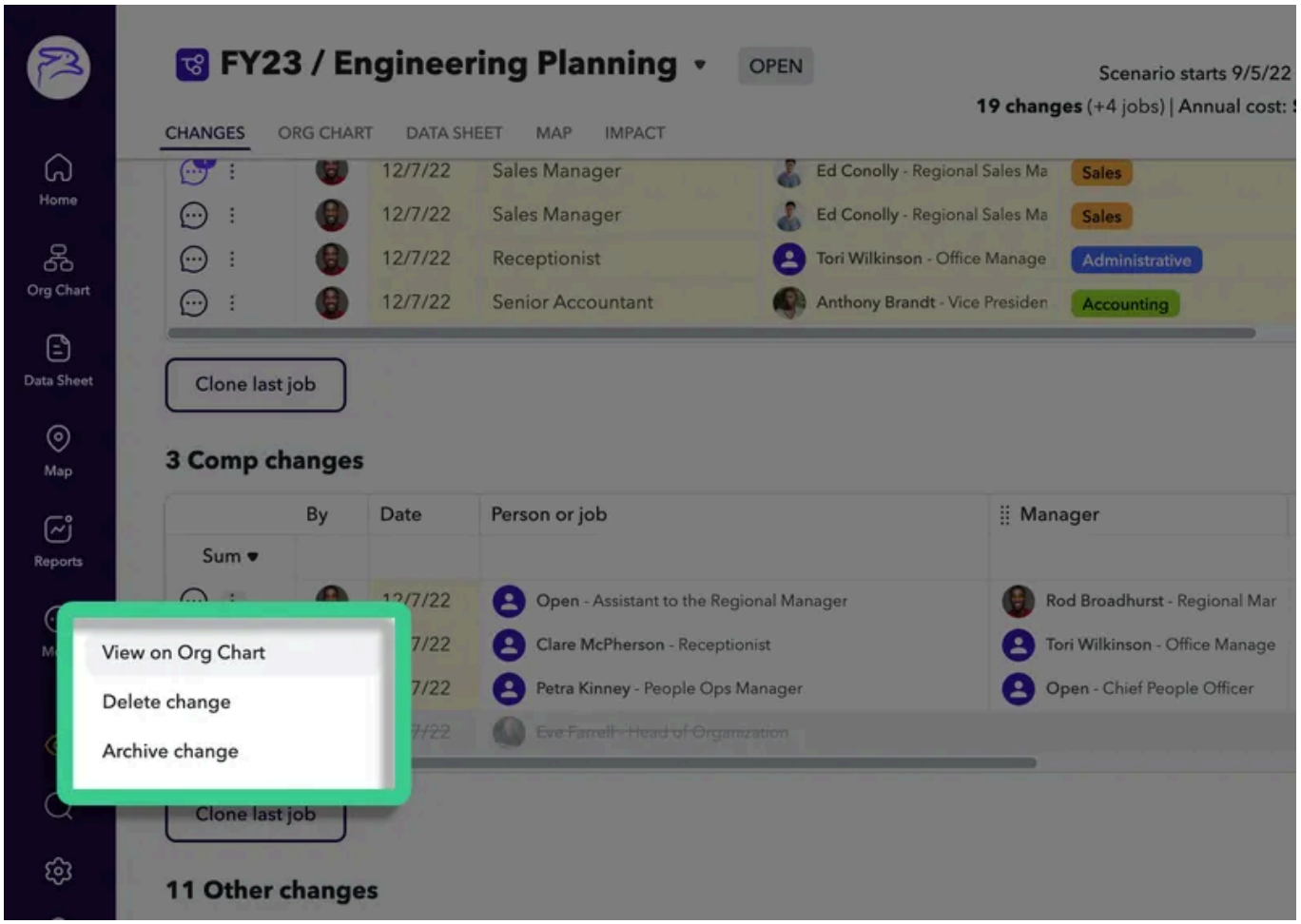
- New jobs
- New hires
- Removed hires
- Departures
- Comp changes
- Other changes
- Moves

From these tables, you can get a big-picture view of your proposed changes so that you can review, make edits, archive, or delete.



Archive a change in a scenario

You can archive a change you've proposed in a scenario when you no longer want it to go into effect but want to keep a record of it within the scenario.



To archive a change that you have proposed in a scenario:

1. Select the row menu (⋮) for the change you want to archive.
2. Select **Archive change**.
    - The change is archived and displays in the Changes table with a strikethrough.
    - Even though it continues to display in the Changes table, it is not included in visualizations in the **Org Chart**, **Data Sheet**, and **Impact** tabs of the scenario.
    - The archived change is not applied when the scenario is merged to Primary.

To unarchive the change, select the row menu (⋮) again and select **Unarchive change**. This restores the change to the scenario and it is applied when the scenario is merged to Primary.

Delete a change from a scenario

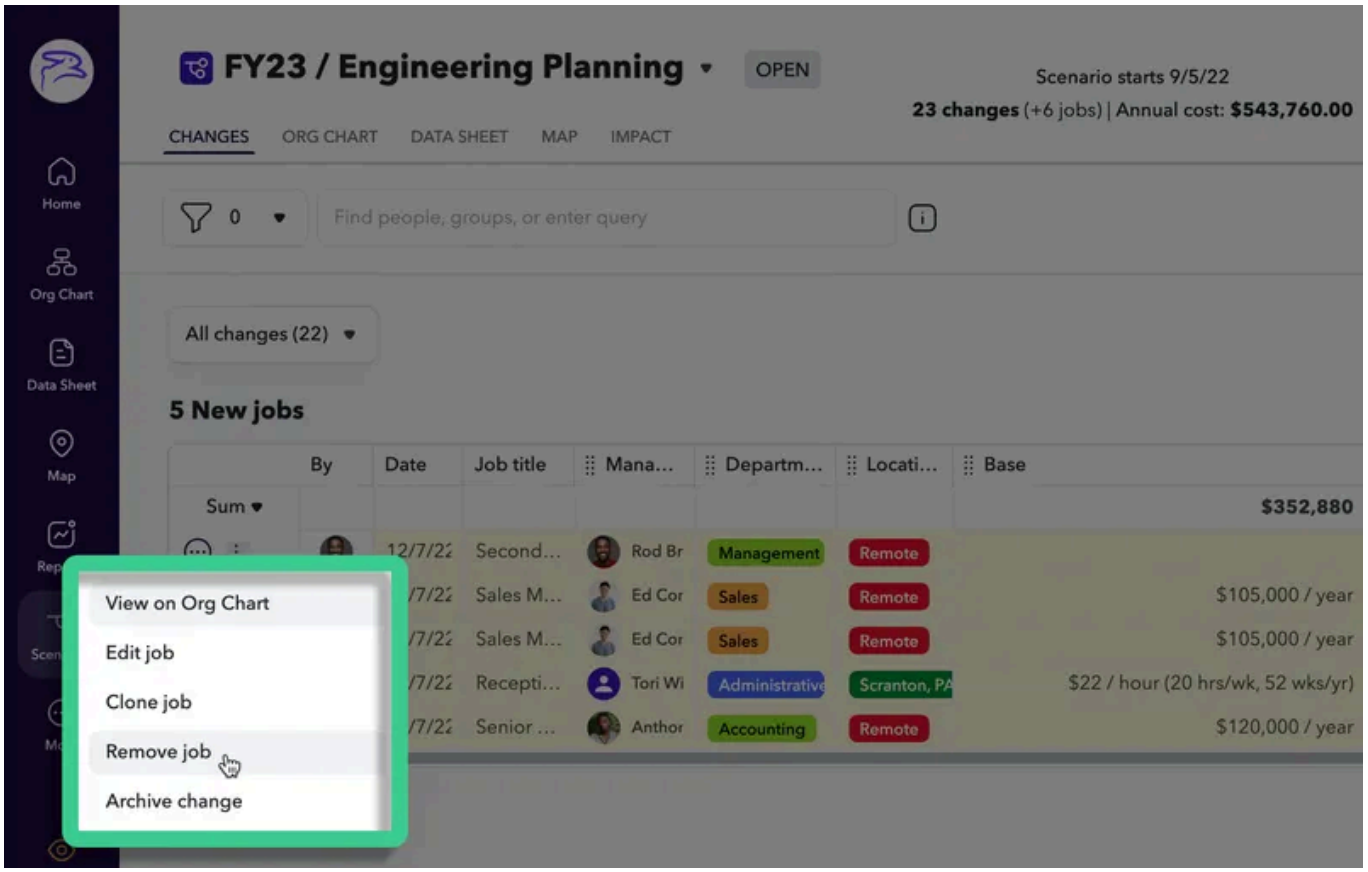
You can also permanently delete a change you've proposed from a scenario in cases where you want to remove it completely.

To delete a change from a scenario:

1. Select the row menu (⋮) for the change you want to delete.
2. Select **Delete change**.
3. Select **Confirm**.
    - The change is permanently deleted and removed from the scenario.

Remove a job you added in a scenario

You can remove a job that you've added in a scenario when you no longer need it or want to change direction with the changes you're proposing.



> This process is for removing a job that you have added within a scenario. To remove a job that already exists in your Primary org, you should instead propose the termination in a scenario. **Learn more.**

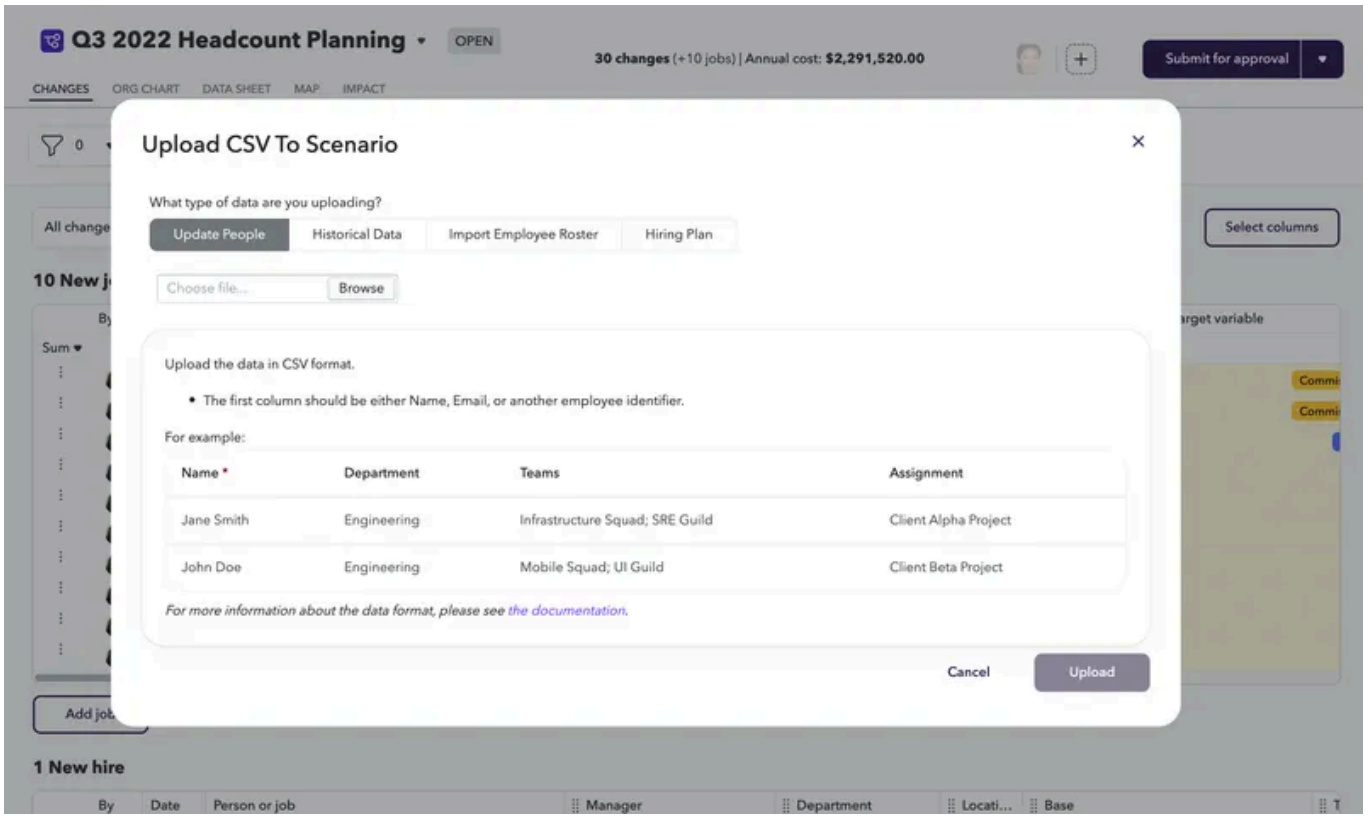
To remove a job that you have added in a scenario:

1. Select the row menu (⋮) for the job you want to remove.
2. Select **Remove job**.
3. Select **Confirm**. The job is permanently removed from the New jobs table.

5.5.1.2.2. Importing changes into a scenario

Instead of manually making your proposed changes within the **Org Chart** or the **Data Sheet** tabs of your scenario, you can also import potential changes into your scenario using a .csv upload. **Learn more.**

> You cannot import new people or create new groups or departments within a scenario. Those must first be added to your primary organization.



Types of changes you can import to a scenario

You can import the following types of data into your scenario:

Type of data	Description	Requirements
Update People	Use this option when you're updating specific data about people (for example, when you are reorganizing people and need to change their departments).	The following column must be included in your .csv: • Name, email, or other employee identifier
Historical Data	Use this option to update historical data within your ChartHop organization (for example, start dates).	The following column must be included in your .csv: • Name, email, or other employee identifier
Employee Roster	Use this option to import an employee roster for existing employees. Please note that you cannot add new people using this option. New people must first be added to your primary organization.	The following columns must be included in your .csv: • Name • Title • Start Date • Manager
Hiring Plan	Use this option to upload your hiring plan (for example, new roles you will be proposing).	The following columns must be included in your .csv: • Title • Start Date • Manager

Import changes into a scenario

To import changes into a scenario using a .csv upload:

1. In your scenario, select the **Actions ▼** dropdown menu.

2. Select **Import CSV**.
3. Select the type of changes you are uploading. The following options are available:
    - **Update People**
    - **Historical Data**
    - **Import Employee Roster**
    - **Hiring Plan**
4. Browse for and select your .csv file.
5. Select **Upload**.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

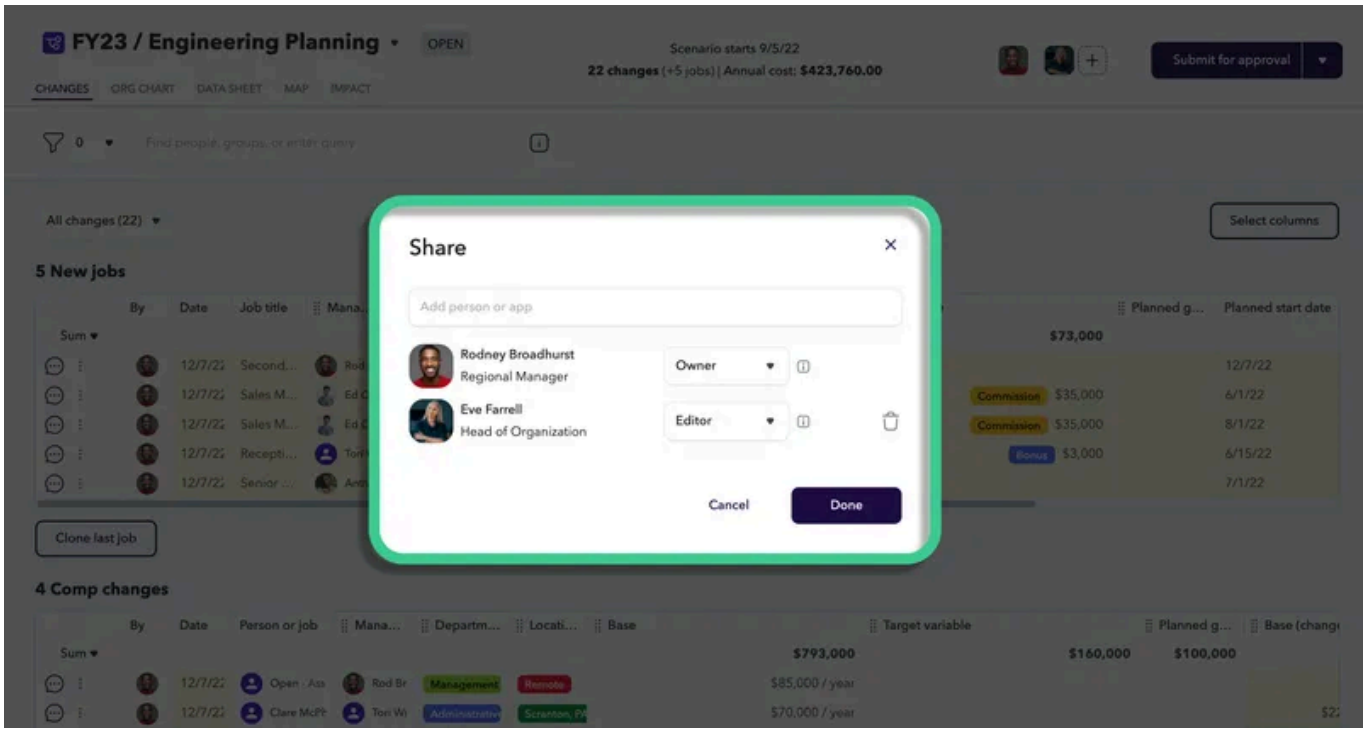
Roles: Recruiting editor | Owner | Technical owner

5.5.1.3. Collaborating in a scenario

You can share your scenarios with your peers (for example, with your leadership team or with an HR business or finance partner) so that everyone can collaborate, make edits, and provide feedback. You can also share your scenario with some integrated ChartHop apps (for example, for financial planning and analysis purposes outside of ChartHop). **Learn more.**

In order to collaborate with someone in a scenario, they must be current users in ChartHop.

> Only scenario owners can share a scenario and edit scenario permissions.
>
> When you share a scenario, only the people you share your scenario with can see the changes within the scenario. Your scenario and all changes within the scenario are not visible to the rest of your organization or put into effect until the scenario is merged to Primary. **Learn more.**



To share a scenario with someone:

1. Open your scenario.
    - You can share an in-progress scenario only when it has a review status of **Open**.
2. In the scenario header, select your profile picture or select the **+** icon to open sharing permissions.
3. Enter the name of the person you want to share your scenario with in the **Add person** field.
4. Using the dropdown, configure the scenario permission for that person. **Learn more.**
5. (Optional) Repeat the previous steps to add any additional scenario collaborators.
6. Once you're finished editing sharing permissions, select **Done**.

Once you've shared your scenario with someone, ChartHop sends them a notification that they now have access to your scenario. To later adjust their permissions or to completely remove their access, you can click on their profile picture in the scenario header.

> Scenario views, including any new added columns, can be maintained when you share the scenario with others with access to the scenario. To share a specific scenario view, an owner of the scenario can customize the columns displayed by clicking "select columns" and then "save columns".

Scenario permissions

As a scenario owner, you can assign the following permissions to the people you're collaborating with:

Permission	Description
Owner	Indicates this person has full access to the scenario; they can view, edit, and share everything in the scenario.
Editor	Indicates this person can view and edit everything in the scenario.
Viewer	Indicates this person can view everything in the scenario, including compensation and cost summaries, but cannot make edits.

Data Sharing Access

Permission	Description
Standard Data Access	The user will only see changes within that scenario that they would be able to see on Primary, given their access role.
Limited Data Access	The user will only see changes for jobs or people below them in the org chart. They cannot view or edit scenario changes above them or outside their reporting line, regardless of their regular ChartHop access role. Limited editors cannot view the total cost summary.
Full Data Access	You are overwriting the individual's current user permissions, allowing them full access to all the changes to data in the scenario, which could potentially include sensitive information (such as compensation) depending on your ChartHop access role. ChartHop recommends only assigning those permissions to individuals who regularly have access to highly sensitive information.

Examples:

A viewer with standard data access, would be able to see the changes in the scenario that they would normally be able to see in primary. For example, if Employee A had a “compensation viewer” user access role, and were shared a scenario as a viewer with standard data access, they’d be able to see compensation data for the whole company.

An editor with full data access would be able to see and make changes to all data in the scenario, even if it is outside their regular access level. Keeping with Employee A, who has a “compensation viewer” user access role, if they were shared a scenario as an editor with full data access, they would be able to see all data in the scenario, which may include more data than they typically can see.

> When you assign the **full data access** permissions to someone, you give them full access to all the changes to data in the scenario, which could potentially include sensitive information (such as compensation) depending on your ChartHop access role. ChartHop recommends only assigning those permissions to individuals who regularly have access to highly sensitive information. **Learn more.**

Entering comments in a scenario

When you're collaborating in a scenario, you have the ability to enter employee-specific comments on the change row or overall comments in the **Comments** section of the scenario.

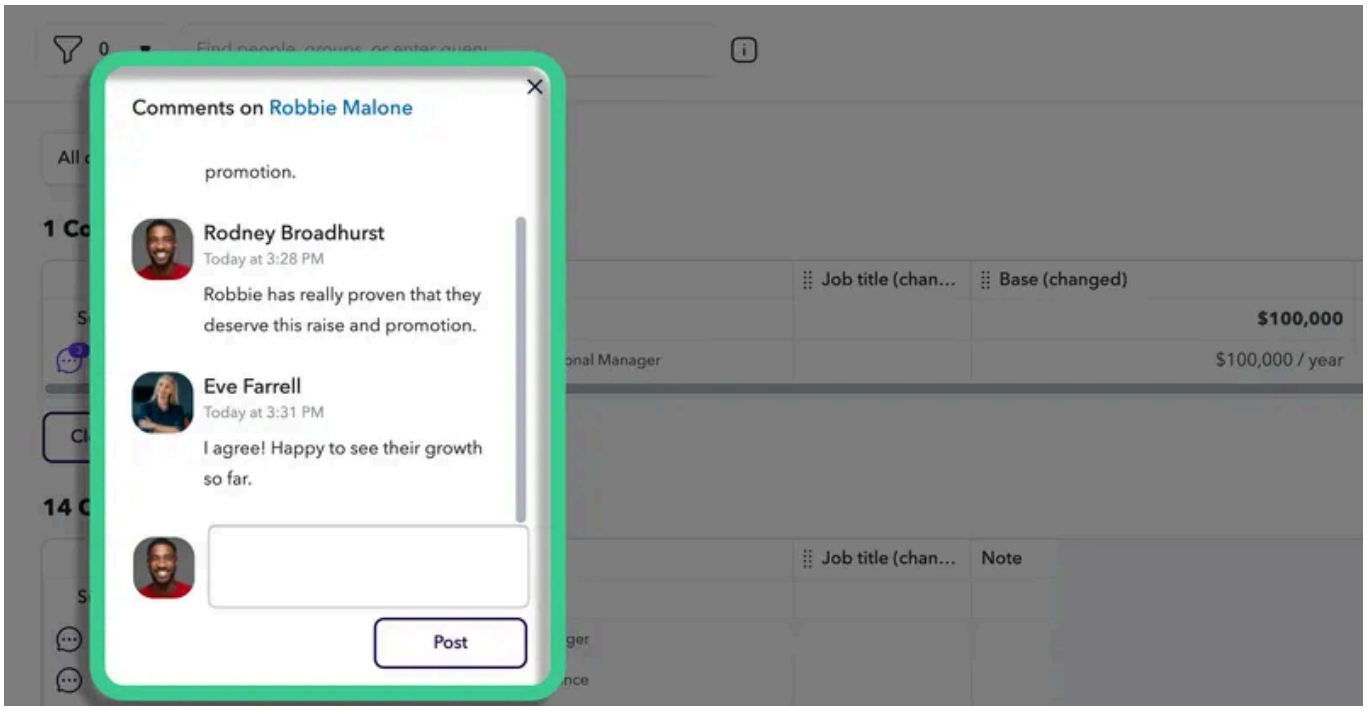
As an owner, you receive a notification whenever someone comments in the **Comments** section of the scenario. You do not receive notifications when someone adds employee-specific comments. Individuals with access to the scenario can be tagged in all comments but they only receive a notification when they are tagged in the **Comments** section.

> People with **Limited Viewer** permission to the scenario can only view and enter comments if there are changes that they can see.

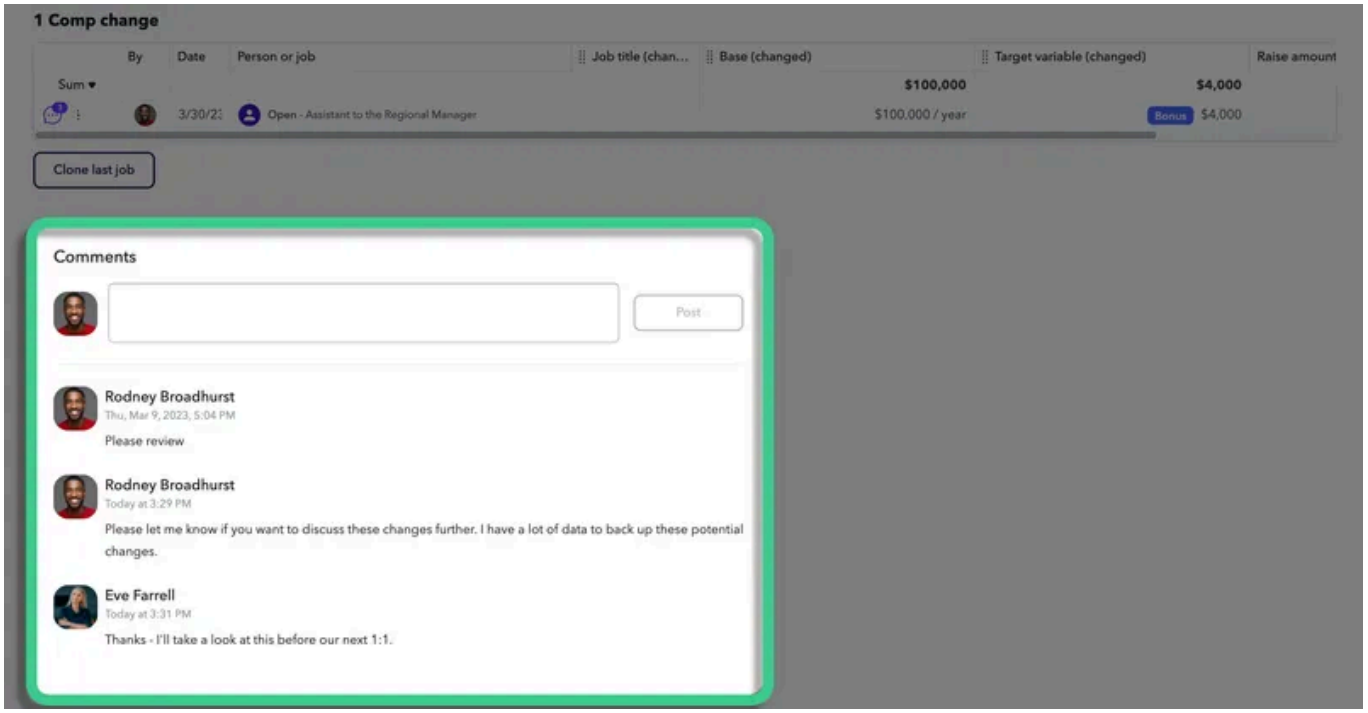
There are two types of comments within a scenario:

- Employee-specific comments apply only to a specific employee or change row within the scenario Changes tab.
- Overall comments apply to the entire scenario and display at the bottom of the scenario. These comments also include the comments you enter when you submit, approve, reject, or withdraw a scenario.

To enter an employee-specific comment, select the Comment icon at the beginning of the row for the change. Multiple people can enter comments in the same row. Once comments are posted, the Comment icon displays in purple and indicates the number of entered comments. These comments display to everyone who has access to view the specific changes in the scenario.



To enter an overall comment, navigate to the **Comments** section at the bottom of the scenario page. These comments display to everyone who has access to view the scenario.



You can export all comments within a scenario to CSV. Learn more.

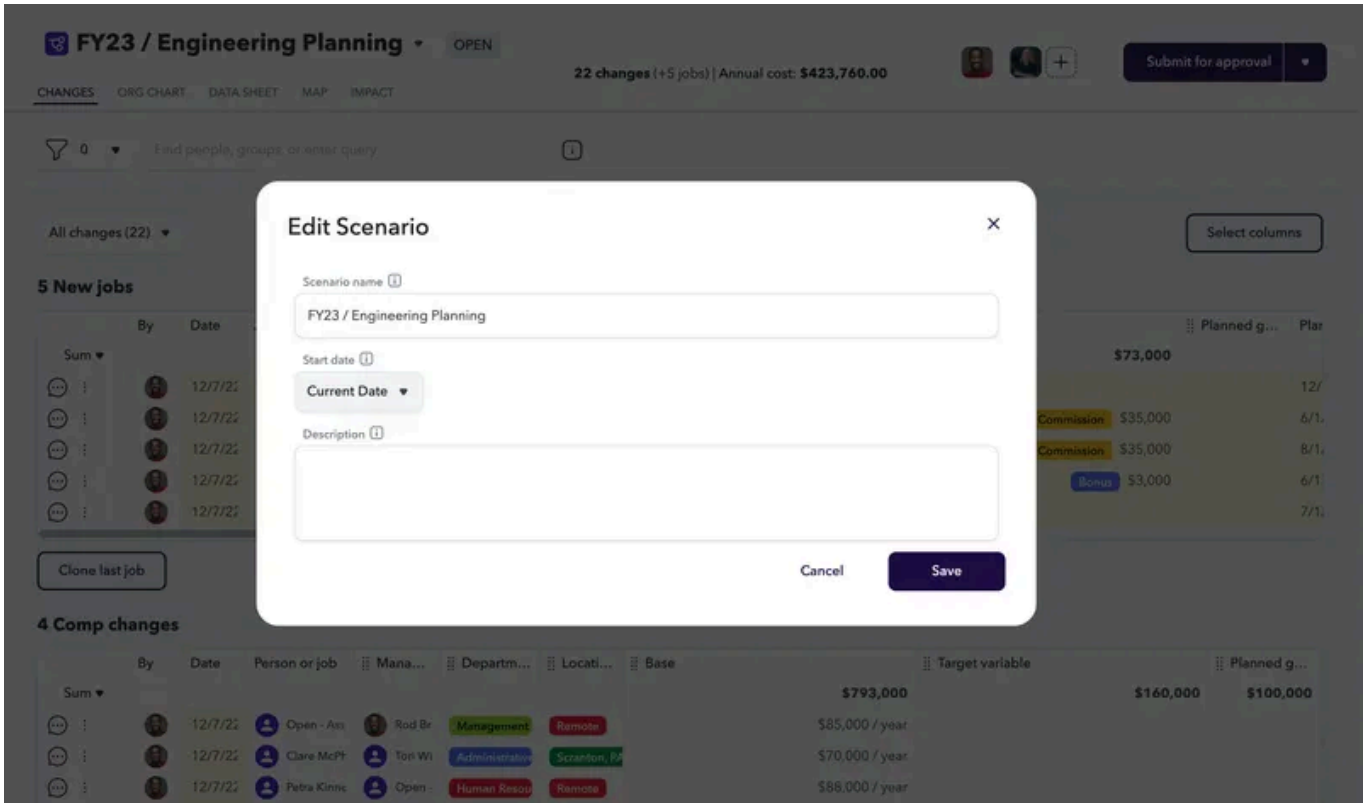
Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.1.4. Editing settings for a scenario

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles:** Recruiting editor | Owner | Technical owner

After you've created your scenario, you can go back and edit the scenario settings (for example, name and description). You can also adjust the dates of your scenario.



Edit scenario settings

To edit scenario settings, you must be the scenario owner and your scenario must have a status of In Progress and a review status of **Open**.

> For more control over how your scenario changes are affected by adjustments to scenario dates, use the **Adjust dates** option. Learn more.

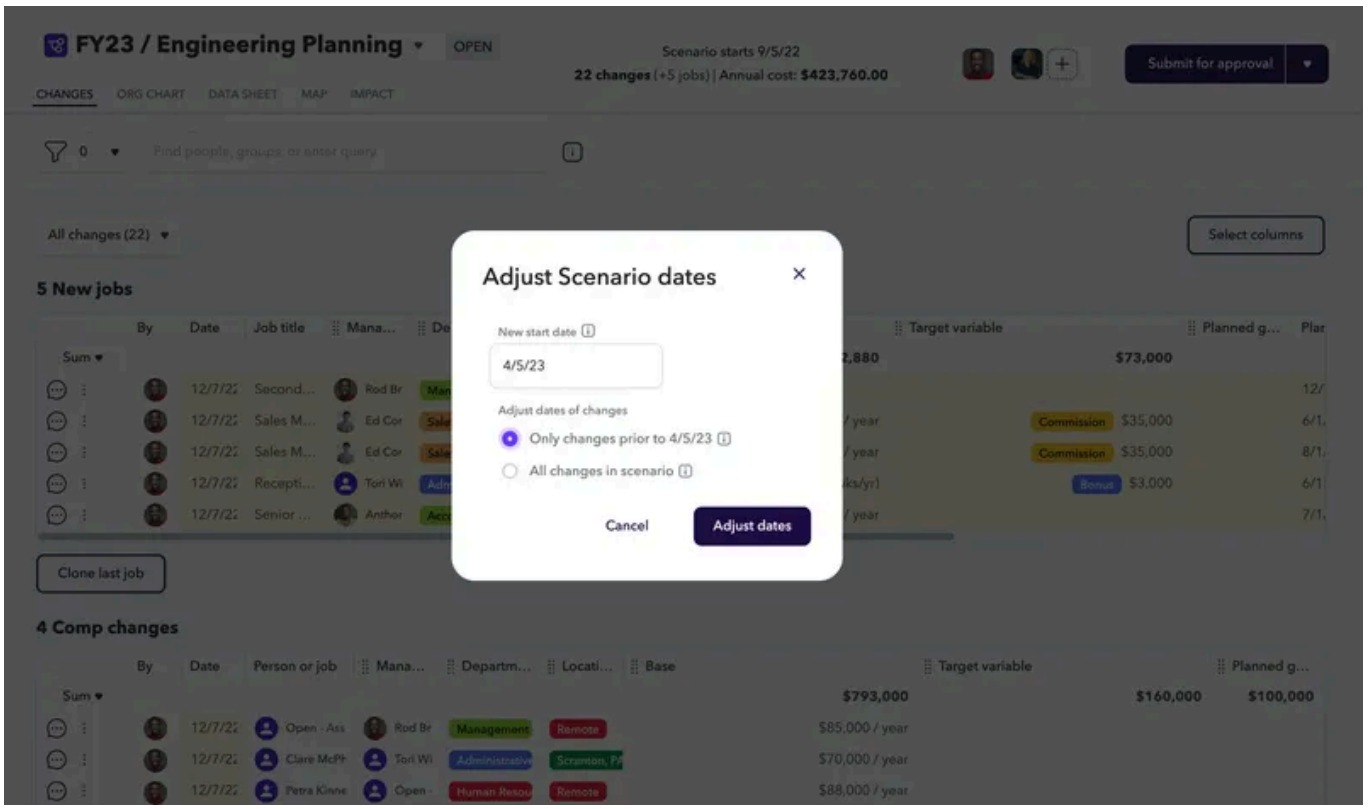
To edit the settings of your scenario:

1. From the left sidebar, select **Planning**.
2. Navigate and open the In Progress scenario you want to edit.
3. On the top right corner of your scenario, select the **Actions ▼** dropdown.
    - When scenario approvals are required for your organization, select the **Submit for approval ▼** button instead.
    - You cannot edit scenarios that are currently under approval review.
4. Select **Edit scenario details**.
5. Edit your scenario settings.
    - **Scenario name** - The name of the scenario (for example, Q4 Hiring Plan).
    - **Start date** - The date when the changes proposed in the scenario are intended to go into effect. This can be either the current date or an exact date.
    - **Description** - A description of the scenario.
6. Select **Save** to save your edits.

Adjust the dates of a scenario

You can make adjustments to the dates of your scenario after you've created it.

To adjust scenario dates, you must be the scenario owner and your scenario must have a status of In Progress and a review status of **Open**.



To adjust the dates for your scenario:

1. From the left sidebar, select **Planning**.
2. Navigate and open the In Progress scenario you want to edit.
3. On the top right corner of your scenario, select the **Actions ▼** dropdown.
    - When scenario approvals are required for your organization, select the **Submit for approval ▼** button instead.
    - You cannot edit scenarios that are currently under approval review.
4. Select **Adjust dates**.
5. Enter a new start date for your scenario.
    - This is the date when the changes proposed in the scenario are intended to go into effect.
    - The **New start date** field defaults to the current date.
6. Select how the new date is applied to the changes in your scenario:
    - Select whether dates are adjusted only for scenario changes prior to the new start date you entered.
        - When you select the **Only changes prior** option, all changes in the scenario are adjusted to the new start date.
    - Select whether dates are adjusted equally for all changes in the scenario.
        - When you select the **All changes in scenario** option, you can enter a number of days to adjust scenario changes forward.
        - All changes are updated by the number of days you enter. For example, when you enter 3 days, a scenario change with a date of 04/10 and another scenario change with a date of 04/12 are both adjusted to 04/13 and 04/15 (+3 days).
7. Once you're done making adjustments, select **Adjust dates**.
8. Select **Close** once all dates have been adjusted.
    - The Date column in the Changes tables of your scenarios reflects the adjusted dates.

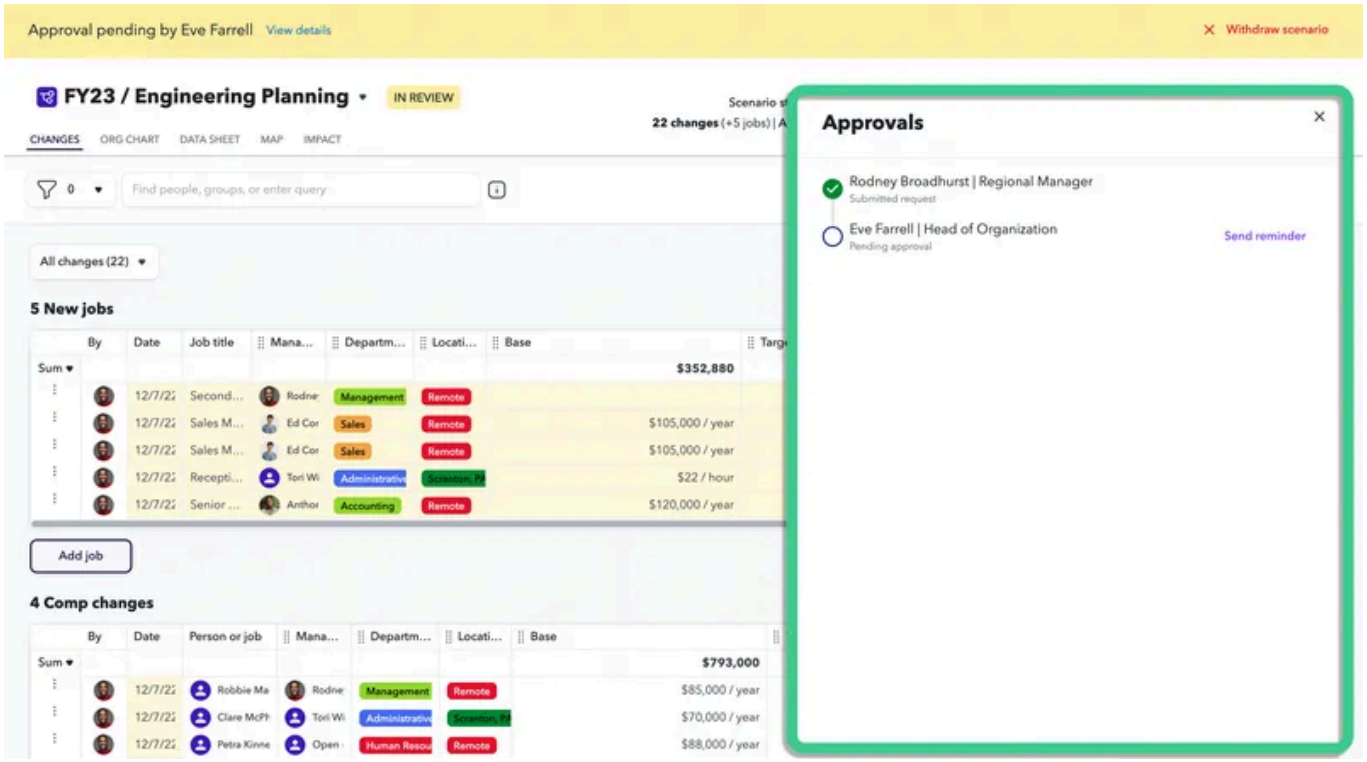
5.5.1.5. Monitoring your scenario in review

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Recruiting editor | Owner | Technical owner

After you submit an approval request for your scenario, the review status of your scenario changes from **Open** to **In Review** and your scenario cannot be edited.

A banner at the top of your scenario lets you know the current status of your scenario. You can select **View details** to see a timeline of the approvals process, including the names and titles of the approvers and changes in review status.



View details for approvals

Send a reminder to your scenario approver

When your scenario is pending approval, you have the ability to send a friendly reminder to the approver from the Approvals details of your scenario.

To send a reminder:

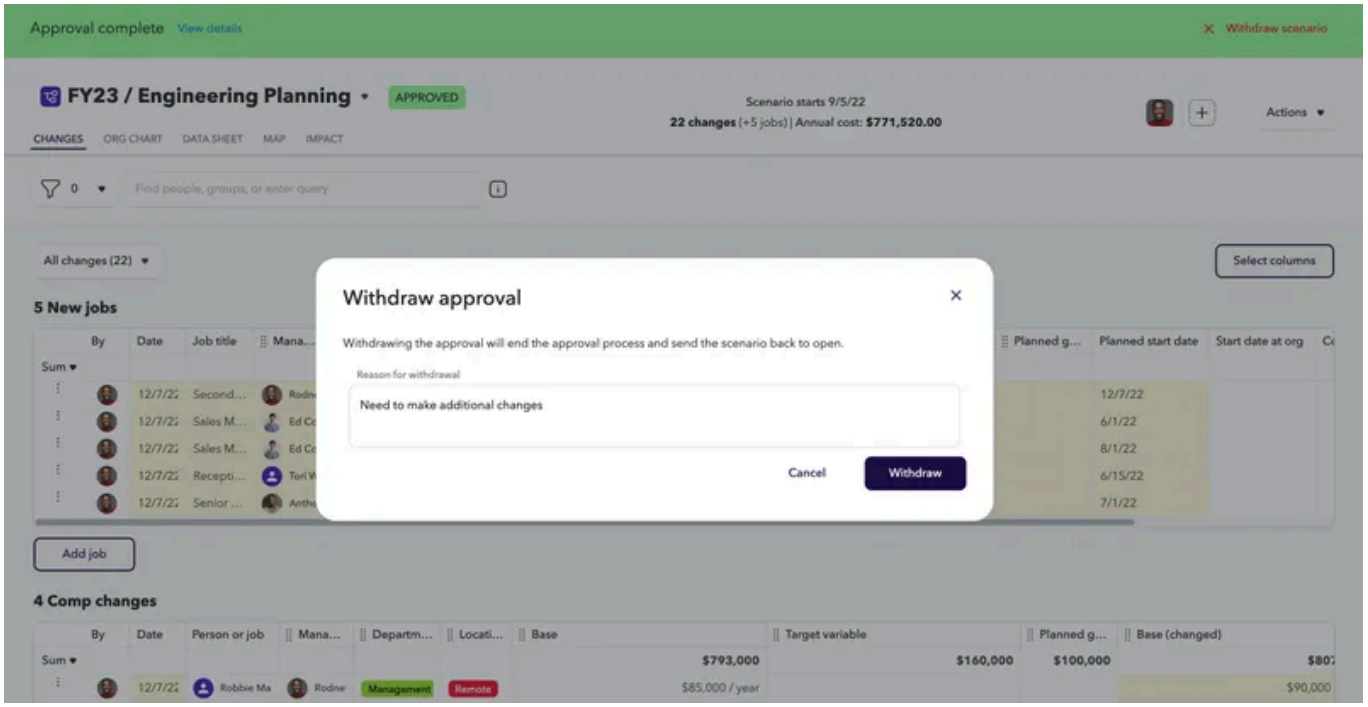
1. Access your scenario. Your scenario should have a status of **In review**.
2. In the banner at the top of the screen, select **View details**.
3. In the Approvals details that display, select **Send reminder**.
    - ChartHop sends an email reminder to the approver whose approval is pending.

Edit your scenario after it has been submitted

When your scenario is in a status of **In review**, it is locked and you cannot make any edits. In order to make any additional changes, you must withdraw the approval request for your scenario.

Withdrawing your scenario removes the approval request from the Tasks of all approvers and returns it to a status of **Open**.

> If approvers have already given their approval, you can still edit your scenario by selecting **Edit scenario**. However, this changes the status of the scenario from **Approved** to **Open** so you'll have to resubmit the scenario again for approval after you have completed your edits.



Withdraw scenario

To withdraw a scenario:

1. Access a scenario that is either **In review** or **Approved**.

2. In the banner at the top of the screen, select **Withdraw request**.
3. Enter a reason for withdrawing the scenario.
    - You can use this to describe the additional changes you are making or explain any additional reasons for withdrawing the approval request.
    - Any comments you enter are added to the **Comments** section at the bottom of the scenario.
4. Select **Withdraw**.
    - The approval request is withdrawn and the scenario changes to a status of **Open**, allowing you to make additional edits.
    - Approvers are sent an email notification that the approval request has been withdrawn.

Edit your scenario after it has been rejected

When your scenario is rejected, approvers send it back to you with their comments. You are also notified by email that your scenario has been rejected.

To view and edit your rejected scenario:

1. Access your scenario. Your scenario should have a status of **Rejected**.
2. Comments entered by the approvers display at the bottom of the screen in the **Comments** section.
    - These comments contain feedback and additional information explaining why your scenario was sent back to you.
3. In the banner at the top of the screen, select **Edit scenario**.
    - This changes the status of your scenario to **Open** and unlocks it for editing.
    - Once you are done revising and editing your scenario, you can resubmit it for approval by selecting **Request approval**. **Learn more.**

5.5.1.6. Submit an approval request for a scenario

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

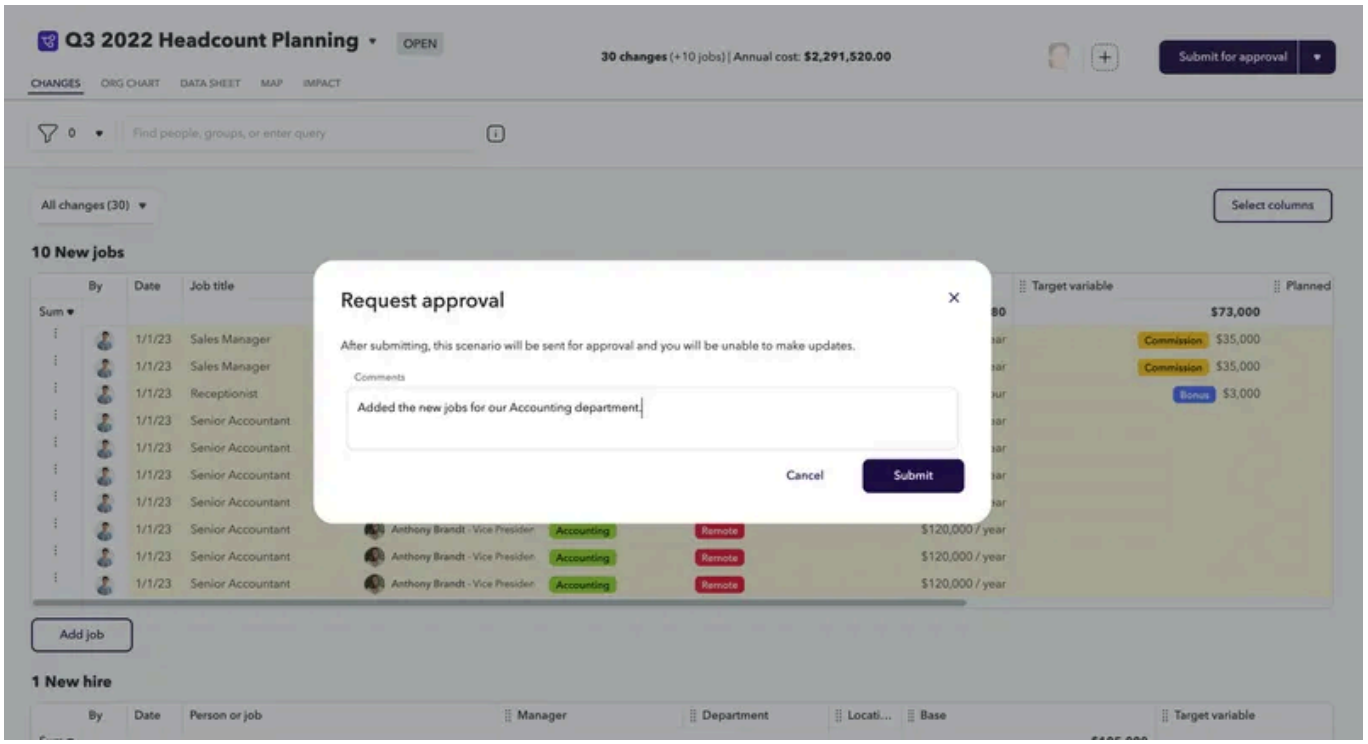
Roles: Recruiting editor | Owner | Technical owner

When approvals are enabled for your organization, you must submit an approval request for your scenario.

When approvals are not enabled for your organization, you have the ability to merge your scenario to primary when you have the appropriate permissions. **Learn more.**

After you have finished proposing changes in your scenario, you can submit your changes for approval. When you submit a scenario for approval, approvers review your proposed changes and decide whether to approve or reject the scenario. Only scenario owners can submit for approval. A scenario can have multiple owners.

You cannot make any edits after you submit your scenario for approval. To make edits, you must withdraw your scenario submission. **Learn more.**



Request approval

When you submit, both you and the approvers receive an email notification that the scenario has been submitted for approval. Approvers also receive a task for reviewing the scenario and are added as collaborators to the scenario.

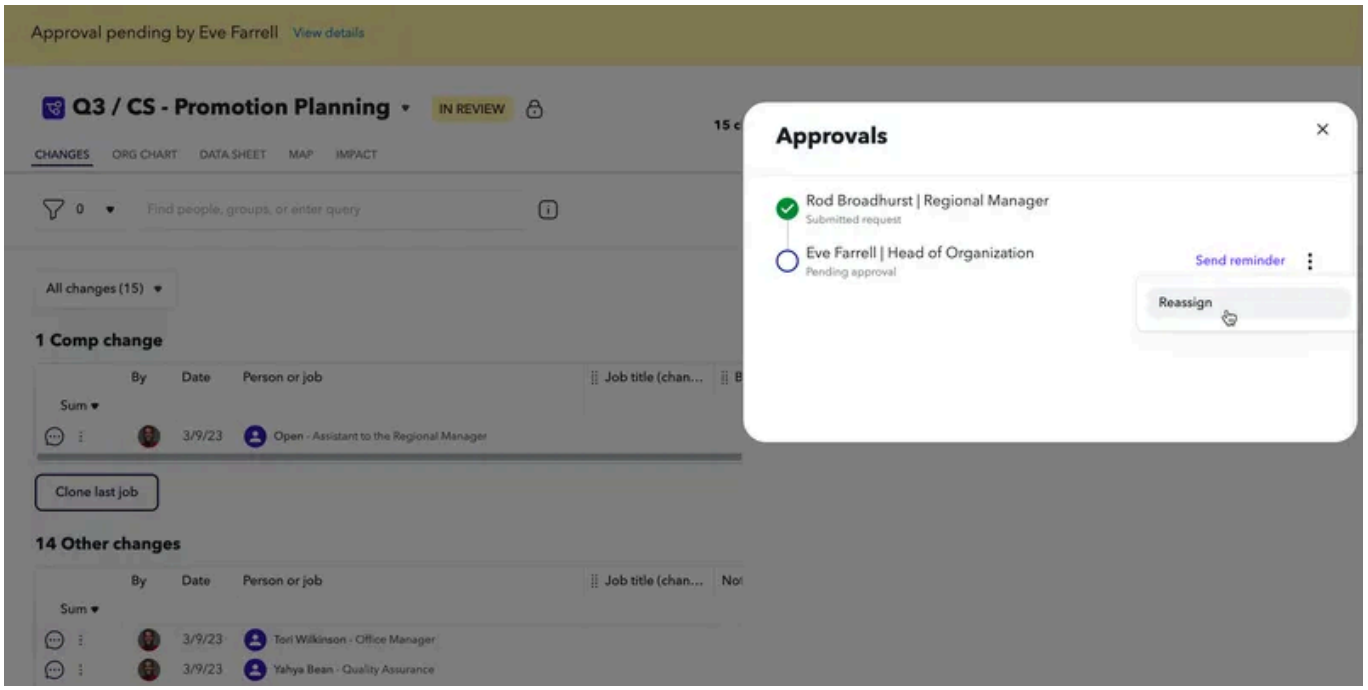
To submit an approval request for your proposed scenario:

1. In your scenario, verify that the **Changes** tab accurately summarizes all your proposed changes.
2. Select **Request Approval**.
3. In the **Request Approval** dialog, enter a comment for the approver.
    - This can be a quick explanation for your proposed changes or additional background information.
    - Any comments you enter are added to the **Comments** section at the bottom of the scenario.
4. Select **Submit**.

5.5.1.7. Reassign an approver for a scenario

You can reassign an approver when the original approver for a scenario is unavailable (for example, due to PTO or family leave).

> The person who originally submitted the scenario for approval can't reassign the approver. A person with Editor access to the scenario must reassign the approver.



To reassign an approver:

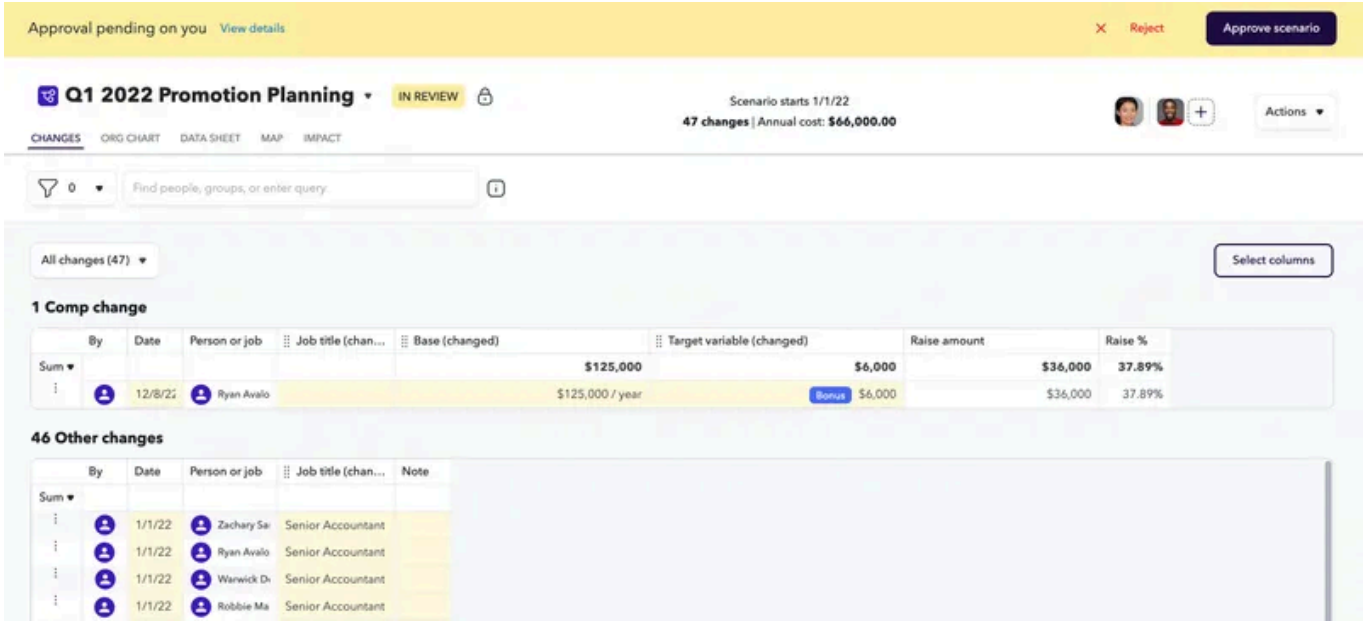
1. From the left sidebar, select **Planning**.
2. Access the scenario whose approver you want to reassign.
    - The scenario should have a Review status of **In review**.
3. Select **View details** from the banner at the top of the scenario.
4. Next to the approver you want to reassign, select the ⋮ menu and select **Reassign**.
5. In the **Approver** field, enter the name of the replacement approver.
6. Enter a comment to explain the reassignment.
7. Select **Reassign**. The scenario is shared with the new approver for review. A notification is also sent to the new approver.

5.5.1.8. Reviewing an approval request for a scenario

As an approver for scenarios, you have the ability to approve or reject the proposed changes within a scenario:

- When you approve a scenario, you give the go-ahead for the changes in the scenario to be merged to your primary organization.
- When you reject a scenario, you send the scenario back to the requester with constructive feedback for additional edits and changes.

You receive an email notification when someone requests your approval for a scenario as well as a Tasks in the **My Tasks** section of your ChartHop home page.



To review a scenario:

1. From the **My Tasks** section of the ChartHop home page or the email notification, select the **Review scenario** action for the scenario you want to review.
2. Review the changes proposed within the scenario.
    - The **Changes** tab displays a summary of all changes, including any new jobs or changes to compensation and headcount.
    - The cost summary at the top of the scenario indicates the total cost of all the proposed changes.

- You can also visualize the proposed changes using the **Org Chart**, **Data Sheet**, **Map**, and **Impact** tabs. Each of these tabs displays your organization as it would appear were the proposed changes to be enabled and put into effect.

3. Once you are done reviewing, you can either approve or reject the scenario (see below).

Approve the scenario

After you are done reviewing, you can give your approval to the proposed scenario.

To approve a scenario:

1. Select **Approve scenario** in the banner at the top of the scenario screen.
2. In the **Approve scenario** dialog, enter an approval comment.
   - Any comments you enter are added to the **Comments** section at the bottom of the scenario.
3. Select **Approve**.
   - ChartHop sends an email notification that you have approved the scenario.
   - When applicable, the scenario is sent to the next approver in the approval process.
   - Once the scenario is fully approved, ChartHop also sends an email notification to people with the ability to merge the scenario to primary that the scenario has been approved and is ready to be merged. **Learn more.**

> If the proposer makes any changes to the scenario after you have given your approval, then the approval is rescinded and the scenario changes to a status of **Open**. The proposer must resubmit the scenario again to you for approval.

Reject the scenario

After you are done reviewing, you can choose to reject the proposed scenario.

To return the scenario to the proposer for additional editing or changes:

1. Select **Reject** in the banner at the top of the scenario screen.
2. In the **Reject scenario** dialog, enter a reason for sending the scenario back to the proposer.
    - You can include a comment with feedback for additional edits or suggested revisions for the proposer.
    - Any comments you enter are added to the **Comments** section at the bottom of the scenario.
3. Select **Reject**.
    - ChartHop sends an email notification that you have rejected the scenario.

Withdraw approval for a scenario

If you change your mind about an approval, you have the ability to withdraw your approval. You can only withdraw your approval for approved scenarios that have not been merged yet.

To withdraw your approval:

1. Access the scenario with the approval you want to withdraw. The scenario should have a status of **Approved**.
2. In the banner at the top of the screen, select **Withdraw approval**.
3. Enter a reason for withdrawing the approval.
    - Any comments you enter are added to the **Comments** section at the bottom of the scenario.
4. Select **Withdraw**.
    - The status of the scenario changes from **Approved** to **Open**.
    - ChartHop sends an email notification that the approval has been withdrawn.

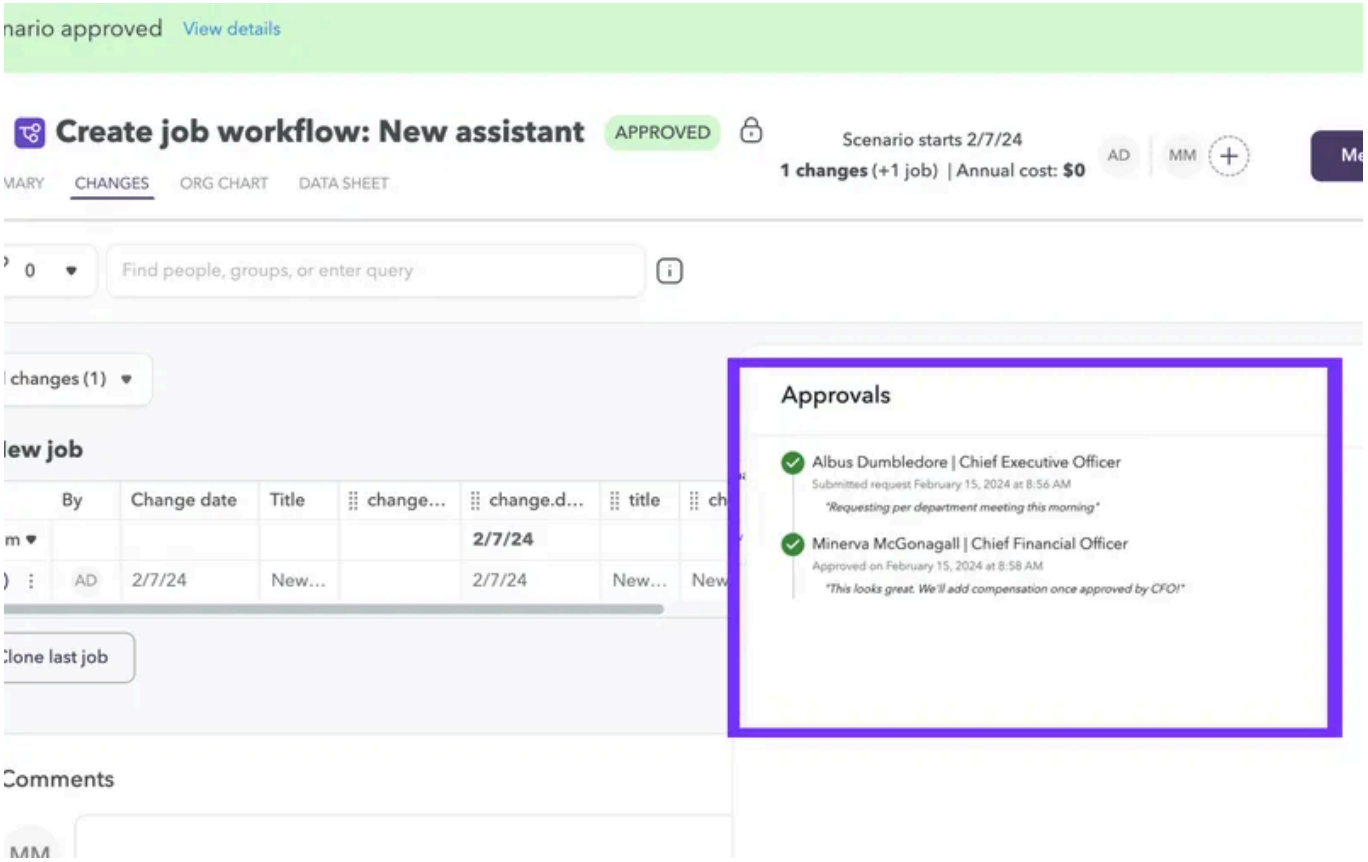
Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Recruiting editor | Owner | Technical owner

5.5.1.9. Approval audit log

ChartHop Approvals include the ability to add a comment when you are approving or rejecting a scenario.

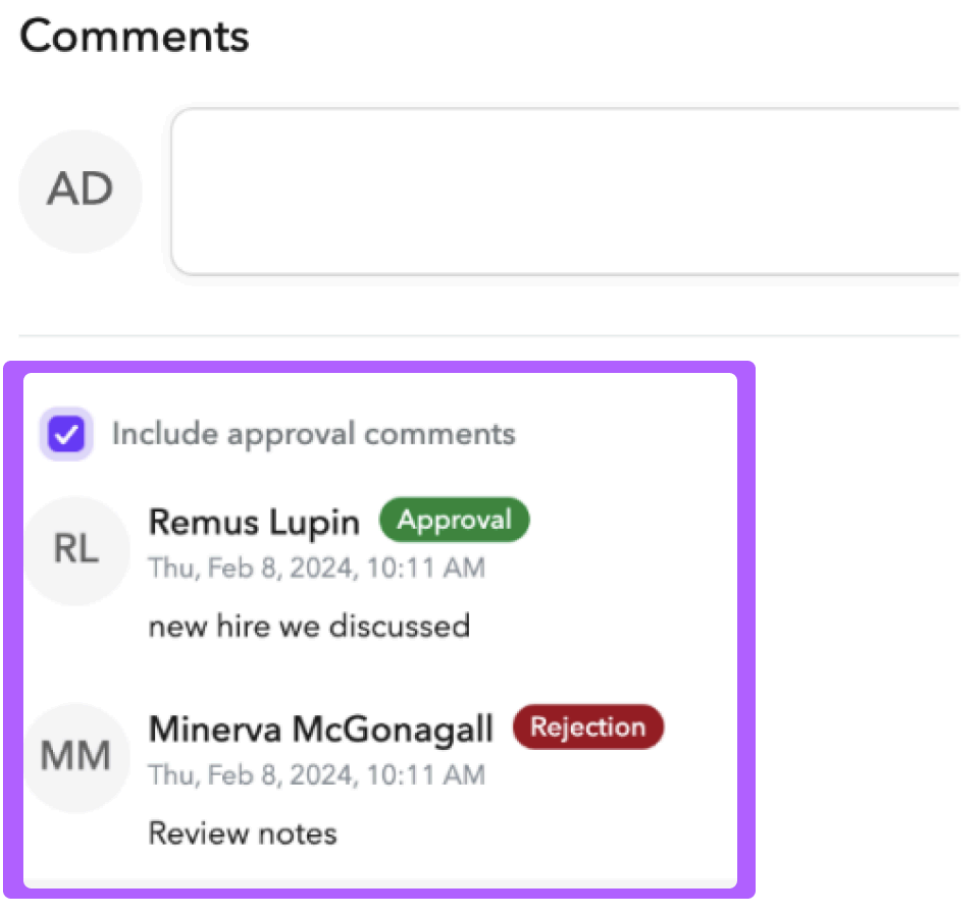
When you have a notification to review a scenario or are in a scenario that is currently **in review**, **approved**, **rejected,** or **merged** you can click “view details” to expand all notes in the sidebar.



When comments are visible:

- From the left sidebar, select **Planning**.
- Access the scenario whose comments you want to review
    - The scenario should have a Review status of **In review, Approved, or Rejected**
- Select **View details** from the banner at the top of the scenario, comments will display in a sidebar to the right of the screen.
- You can also scroll to the bottom of the screen, underneath the comments box.
- Check the box that says “Include Approval Comments”.

- Approval comments and scenario comments will display below the comments box.



When a scenario is **rejected**:

- Comments will be visible unless the scenario is edited.

When a scenario is **approved**:

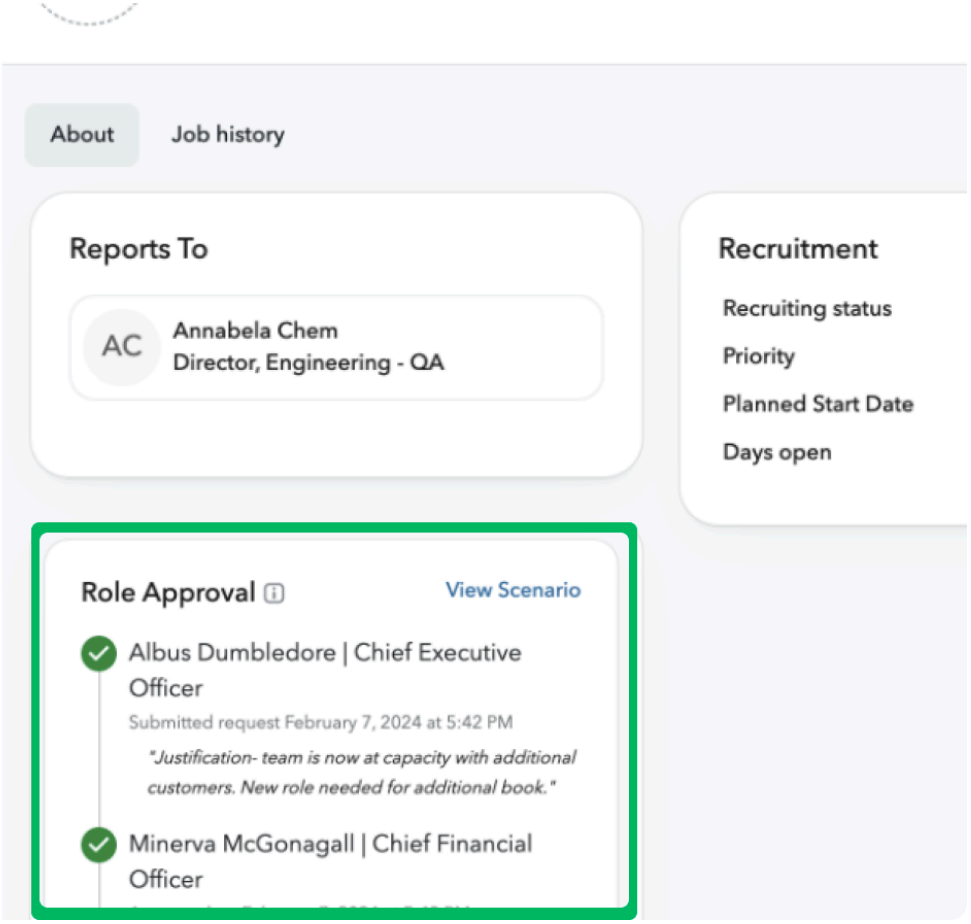
- Comments will continue to be visible.

When a scenario is **merged to primary**:

- Comments will be visible in the scenario
- Comments will also be visible in the profile tab of the open job:

Within the scenario and on the open job page, the approval chain and comments are visible to everyone who can view the scenario.

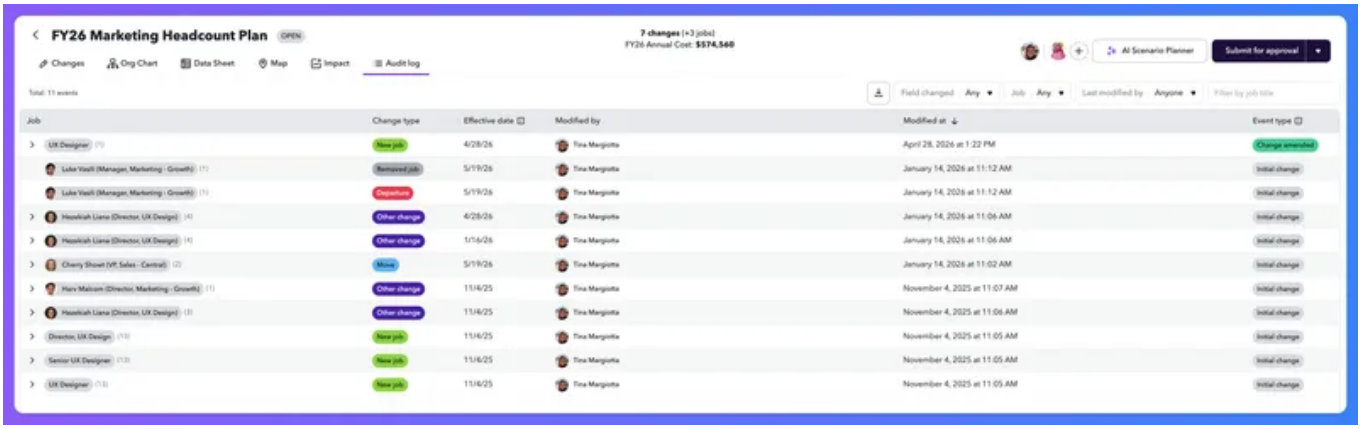
> Within the scenario and on the open job page, the approval chain and comments are visible to everyone who can view the scenario.


About
Job history
Reports To
AC
Annabela Chem
Director, Engineering - QA
Recruitment
Recruiting status
Priority
Planned Start Date
Days open
Role Approval
View Scenario
Albus Dumbledore | Chief Executive Officer
Submitted request February 7, 2024 at 5:42 PM
"Justification- team is now at capacity with additional customers. New role needed for additional book."
Minerva McGonagall | Chief Financial Officer

5.5.1.10. Scenario audit log

Scenario audit log

The scenario audit log shows a complete, time-stamped history of every change made inside a scenario: what was changed, who changed it, when, and what the previous value was. Use it to review collaborator activity, investigate scenario changes, or produce a record for compliance and approval workflows.



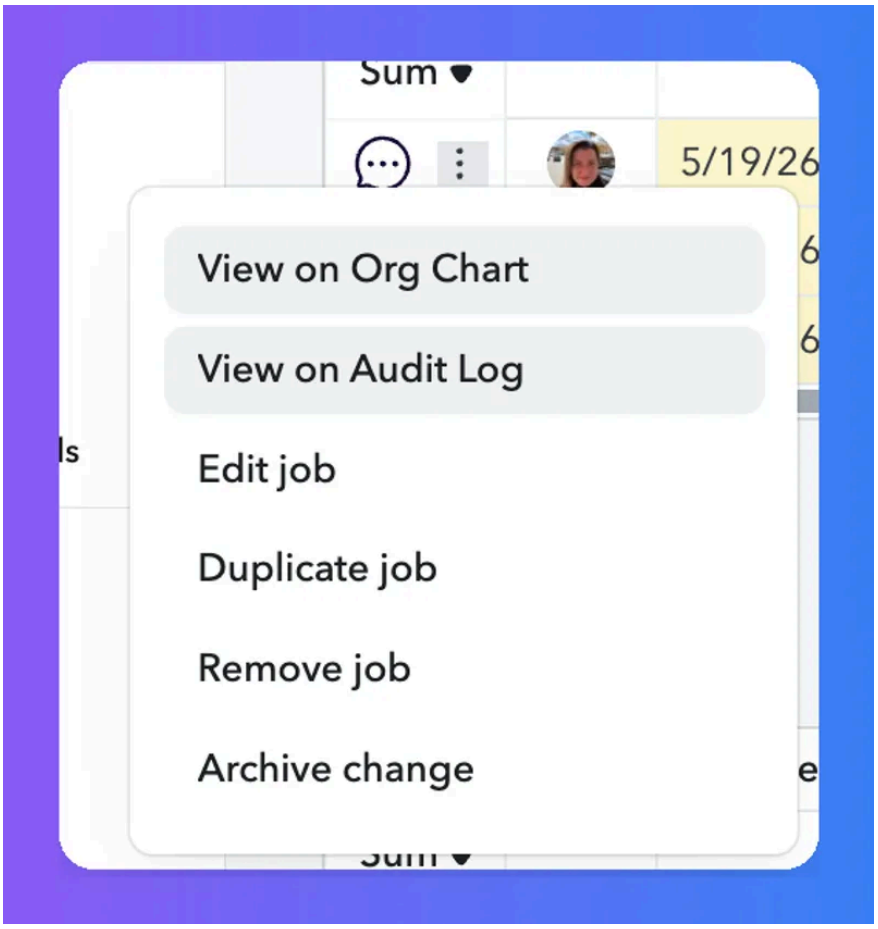
Who can access it

Anyone who can open the scenario can open its audit log. There's no separate permission. Two viewers may see slightly different logs for the same scenario; see Sensitive fields below.

How to access it

Open the scenario and click the **Audit log** tab in the scenario header.

You can also jump to a specific entry from the **Changes** screen by opening the action menu on a row and selecting **View on audit log**.



Clicking the three dot menu shows "View on Audit Log" option

What you'll see

The audit log is a table grouped by job. Each row is a single change to a single field on that job, sorted by **Modified at** (most recent first). Click a row to expand it and see the field-by-field breakdown.

Column	What it shows
Job	The job the change applies to. Click the job title to open it in the org chart at the scenario's effective date.
Change type	The category of change: **Hire**, **Depart**, **Move**, **Comp**, **Create**, **Update**, or **Delete**. Color-coded for quick scanning.
Effective date	The date the change takes effect, stored at the moment the change was made. Editing the change later updates this value on subsequent audit entries but doesn't rewrite prior ones.
Modified by	The user who made the change. For changes made through an integration or API token, this is the app's identity; the real user who initiated it is recorded internally as well.
Modified at	The timestamp when the change was recorded, in UTC.
Event type	Whether this entry is an **Initial change** (first time recorded), a **Change amended** (an earlier change was edited), or a **Change cancelled** (an earlier change was removed).

Expanded row details

Expanding a row reveals one line per field touched by the change, with three side-by-side values:

- **Scenario value**: the new value recorded by this change.
- **Previous value**: the value in the scenario before this change.
- **Primary value**: the value in your main organization data as of the scenario's effective date. Use this to spot when a scenario change has drifted from live data. Not shown for newly-created entries, which have no primary counterpart.

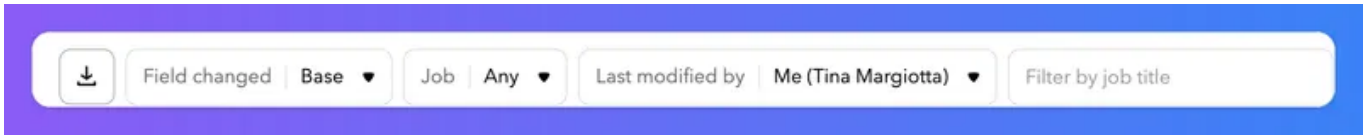


A multi-field edit produces one row per changed field, all sharing the same **Modified at** timestamp. An **amended** entry only contains the fields that changed in that particular edit, not the full state of the change.

Filtering and searching

Use the controls at the top of the table to narrow results:

- **Job**: limit to changes on one or more jobs.
- **Field changed**: limit to specific fields (e.g. salary, manager, title).
- **Modified by**: limit to changes made by a specific person.
- **Job title**: free-text search across job titles.



Exporting

Click **Export audit log** to download the full log as a CSV. The export runs asynchronously and contains one row per changed field. A single edit that touched five fields produces five rows, all sharing the same change ID and timestamp.

Sensitive fields

The audit log respects your existing field-level permissions. If you can't see a compensation or other sensitive field on the job itself, you won't see changes to that field in the audit log either. When every changed field on an event would be hidden from you, the entire event row is omitted. Two users with different access levels may see different row counts for the same scenario. This is expected behavior.

Lifecycle

Audit history is retained permanently. Archiving, merging, or deleting a scenario doesn't remove its audit log; users who can still access the scenario can still view its history. Preview and Test scenarios aren't audited.

Tips

- The audit log is read-only. To undo a change, go back to the **Changes** screen and edit or remove it there. The removal will appear in the audit log as a **Change cancelled** entry.
- New entries can take a few seconds to appear after a change is saved.
- Looking for approval and rejection comments with the full approval chain? See the Approval audit log.

5.5.1.11. Merging a scenario

Once you and your stakeholders have agreed on the changes proposed in a scenario, you can merge those changes into the primary branch of your ChartHop organization using the **Merge to primary** feature.

Only users with the **Owner** or **Org editor** role can merge a scenario to the primary branch of an organization, regardless of whether approvals are required.

When approvals are enabled for a scenario, approvers must review and fully approve the scenario before it can be merged. **Learn more.**

> Merges are permanent actions. Once a merge is complete, all proposed changes in a scenario are put into effect and are displayed to the rest of your organization in ChartHop (depending on the sensitivity of the change and the level of user access level).

Merge a scenario without approvals

When approvals are not enabled for your organization, you have the ability to merge a scenario to primary when you have the **Owner** or **Org editor** role. **Learn more.**

To merge a scenario to primary:

1. Access the scenario you want to merge.
2. Select **Merge to primary**.
3. Select **Merge** to confirm.
    - Once a scenario has been merged, the status of the scenario changes to **Merged** and the scenario displays in the **Merged** tab of the Scenarios page.
    - Accessing the merged scenario displays the date/time the scenario was merged and the name of the user who merged it.

Merge a scenario with approvals

When you are notified to merge scenarios to primary, ChartHop sends you an email notification once a scenario is approved and ready to be merged.

To merge an approved scenario to primary:

1. Access the scenario you want to merge.
2. Review the changes proposed within the scenario.
3. Select **Merge to primary**.
4. Select **Merge** to confirm.
    - ChartHop sends an email notification that the scenario has been merged to you, the approvers, and the proposer.

View merged scenarios

Once you merge a scenario, the status of the scenario changes to **Merged** and the scenario displays in the **Merged** tab of the Scenarios page.

Accessing the merged scenario displays the date/time the scenario was merged and the name of the user who merged it.

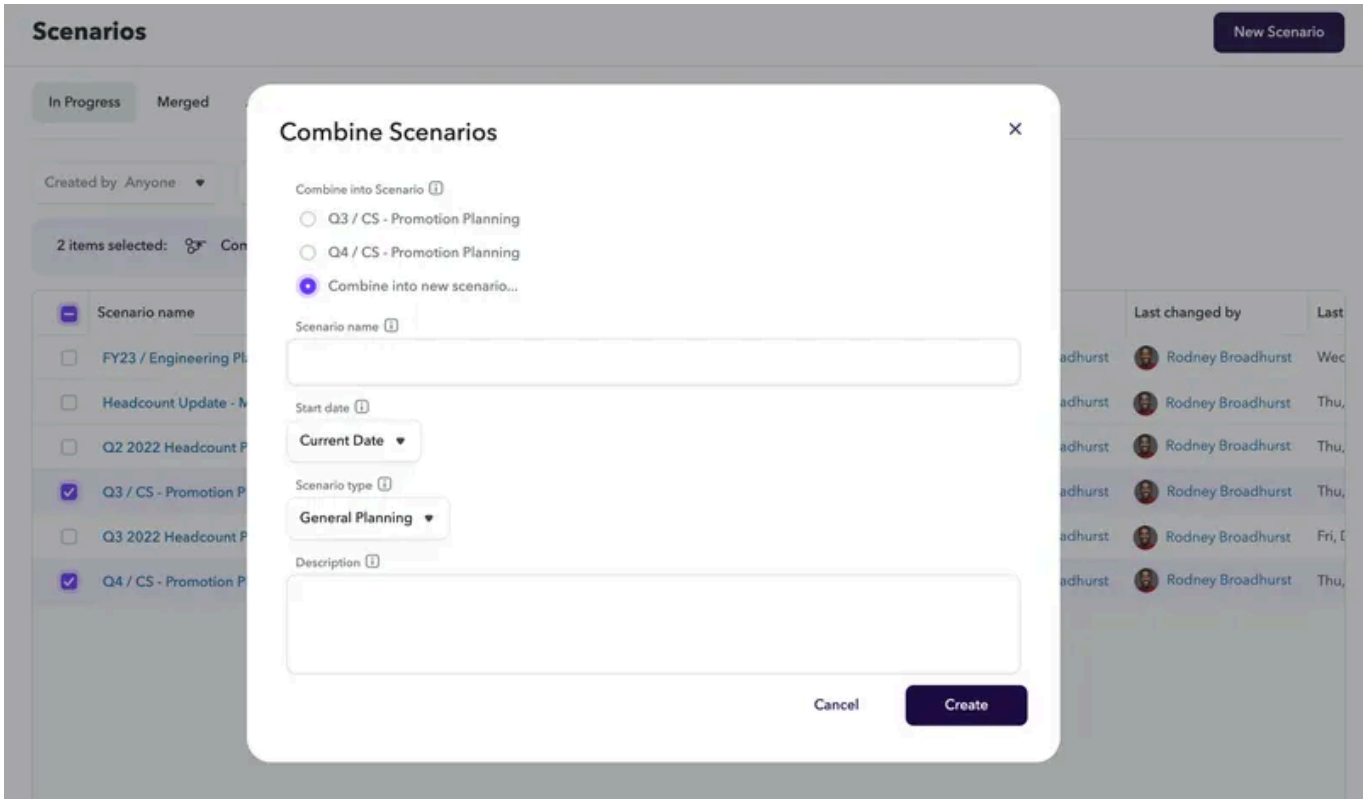
> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles:** Owner | Org editor | Recruiter editor

5.5.1.12. Combining scenarios

You can combine two or more scenarios into a single scenario. This is helpful when consolidating the changes of multiple collaborators in separate scenarios.

When you combine scenarios, you can choose to combine all changes into one of the existing scenarios or to combine all changes into a brand new scenario.



To combine scenarios:

1. In the Scenarios list, select the checkboxes for the scenarios you want to combine.
2. Select **Combine**. The **Combine Scenarios** dialog displays.
3. Select how you are combining all your scenario changes:
    - Add all scenario changes into an existing scenario.
    - Add all scenario changes into a brand new scenario.
4. (Optional) Enter a name for the new scenario (if combining into a new scenario) and define the start date, scenario type, and description.
5. Select **Create**.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Roles: Recruiting editor | Owner | Technical owner

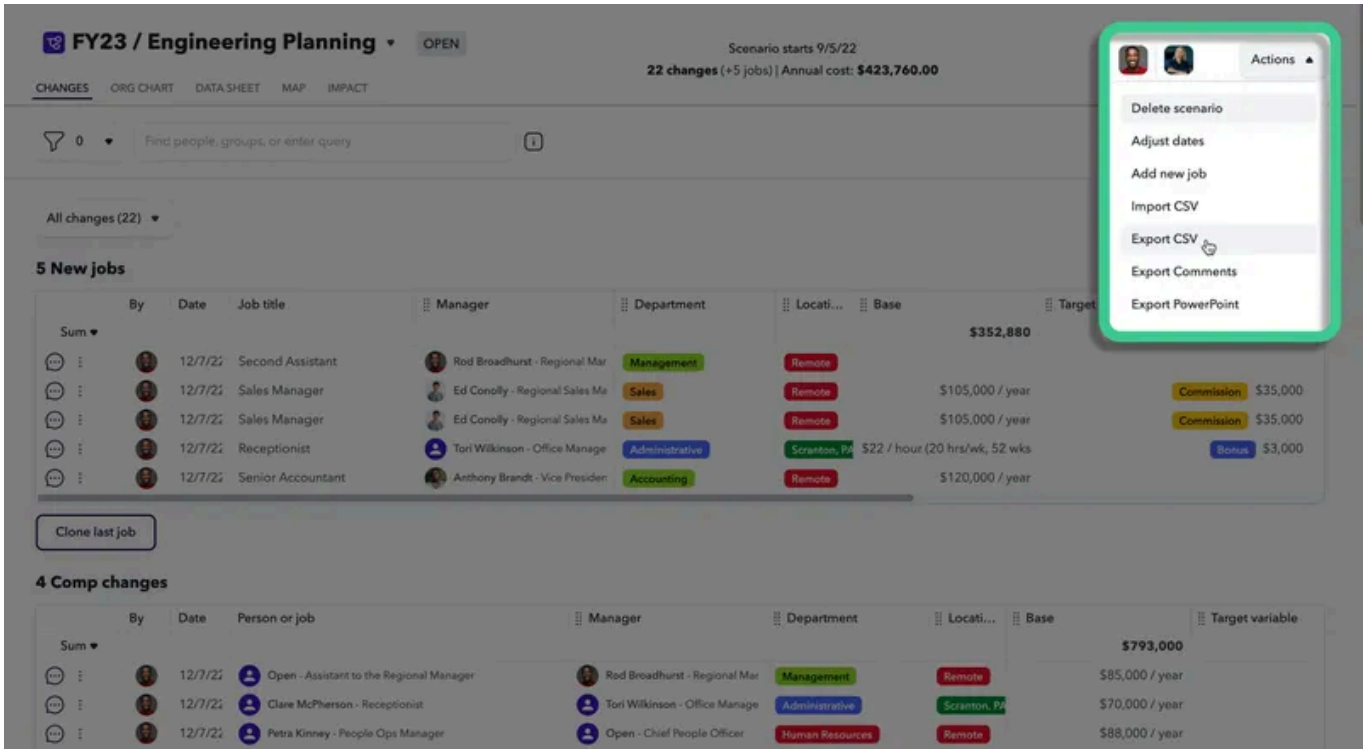
5.5.1.13. Exporting from a scenario

> **Roles:** Recruiting editor | Owner | Technical owner

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

ChartHop enables you to export data from your scenario in various formats. You can export your scenario changes and scenario comments to CSV and create a PowerPoint file based on the changes you make to your **Org Chart** within your scenario.

> You can export from a scenario regardless of status (whether Open, In Review, Merged, or Archived) as long as you have **Owner** permission for the scenario.



Export scenario

Export a scenario to CSV

You can export all the changes in a scenario to a CSV. Each change you've made in the scenario is depicted in its own row within the spreadsheet.

To export your scenario changes to a spreadsheet:

1. Open your scenario.
    - You must have **Owner** permission to export the scenario.
2. From the **Actions** dropdown at the top right of the screen, select **Export CSV**.
    - If your in-progress scenario is currently in a review status of **Open**, you can select **Export CSV** from the **Submit for approval** dropdown.
3. Once the export has finished generating, select **Download**.
    - ChartHop generates a spreadsheet with your scenario changes.
    - Each row in the spreadsheet depicts a separate change.
    - You can find details on the **export formatting here.**
4. Close the **Export** dialog once you're finished downloading.

Export comments in a scenario

You can export all the comments you and your collaborators enter in a scenario. This helps you compile all the comments made throughout the scenario in a spreadsheet for additional portability and transparency.

The following information is included when you export comments from a scenario:

- Name of the employee who received the comments (when applicable)
- Date and time stamps
- ID of the person who entered the comment
- Whether the comment was related to a specific change or employee (entered in a change row) or an overall scenario comment (entered in the **Comments** section at the bottom of the Scenario)

To export a spreadsheet with all comments from your scenario:

1. Open your scenario.
    - You must have **Owner** permission to export comments from the scenario.
2. From the **Actions** dropdown at the top right of the screen, select **Export Comments**.
    - If your in-progress scenario is currently in a review status of **Open**, you can select **Export Comments** from the **Submit for approval** dropdown.

3. Once the export has finished generating, select **Download**.
    - ChartHop generates a spreadsheet with your scenario comments.
    - Each row in the spreadsheet depicts a separate comment. Employees or changes with multiple comments will display in multiple rows.
4. Close the **Export Scenario Comments** dialog once you're finished downloading.

Export a scenario Org Chart to slides

You have the ability to export your scenario **Org Chart** to slides. This **Org Chart** reflects any changes you've made in the scenario and is different from your primary **Org Chart**.

Exporting a scenario **Org Chart** is helpful in situations where your scenario includes a lot of people moves and you want to present those changes visually to other stakeholders.

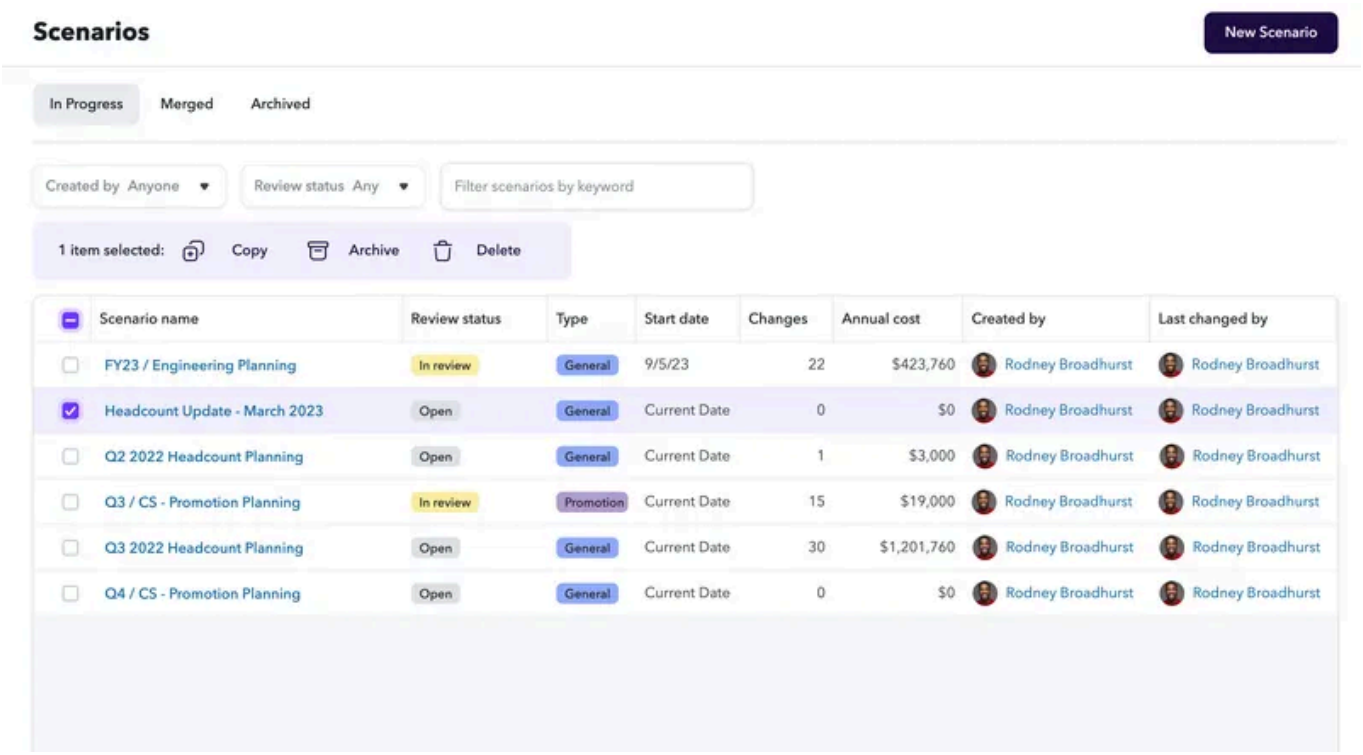
To export a scenario **Org Chart** to slides:

1. Open your scenario.
    - You must have **Owner** permission to export the scenario.
2. From the **Actions** dropdown at the top right of the screen, select **Export PowerPoint**.
    - If your in-progress scenario is currently in a review status of **Open**, you can select **Export PowerPoint** from the **Submit for approval** dropdown.
3. Configure your org chart export. **Learn more.**
4. Select **Export**.
    - Depending on the size of your organization, the export may take some time.
5. Once the export has finished generating, select **Download**.
6. Close the **Export** dialog once you're finished downloading.

5.5.1.14. Deleting a scenario

As a scenario owner, you can permanently delete a scenario when you no longer need it or you can instead archive the scenario for later use.

> You can only archive scenarios that are currently In Progress.



Delete a scenario

You can permanently delete a scenario either from the Scenarios list or within the scenario itself.

Only scenario owners have the ability to delete their scenarios. You can delete all scenarios regardless of status (In Progress, Merged, or Archived).

To delete a scenario from the Scenarios list:

1. From the left sidebar, select **Planning**.
2. Navigate to the scenario you want to delete.
    - Depending on the scenario status, it may be located on the **In Progress**, **Merged**, or **Archived** tabs.

3. Select the checkbox next to the scenario you want to delete.
4. In the menu that displays above the Scenarios list, select **Delete**.
5. Enter **DELETE** to confirm you are deleting the correct scenario.
6. Select **Delete**.
    - Your scenario is permanently deleted.

To delete from within a scenario:

1. On the top right corner of your scenario, select the **Actions ▼** dropdown.
    - When scenario approvals are required for your organization, select the **Submit for approval ▼** button instead.
2. Select **Delete scenario**.
3. Enter **DELETE** to confirm you are deleting the correct scenario.
4. Select **Delete**.
    - Your scenario is permanently deleted.

Archive a scenario

As a scenario owner, you can archive a scenario to remove it from the **In Progress** tab and save it for later use. You can only archive scenarios that are currently In Progress.

You can archive a scenario either from the Scenarios list or within the scenario itself.

To archive a scenario:

1. From the left sidebar, select **Planning**.
2. On the **In Progress** tab, select the checkbox next to the scenario you want to archive.
3. Select **Archive**.
    - This archives your scenario and displays it in the **Archived** tab of the **Scenarios** page.

To archive from within a scenario:

1. On the top right corner of your scenario, select the **Actions ▼** dropdown.
    - When scenario approvals are required for your organization, select the **Submit for approval ▼** button instead.
2. Select **Archive scenario**.

- Your scenario is immediately archived.
- To access an archived scenario, navigate to the **Archived** tab of the **Scenarios** page.

Unarchive a scenario

You can restore an archived scenario back to In Progress at any time in the Scenarios list by selecting the checkbox for the archived scenario and selecting **Unarchive**.

You can also unarchive a scenario by selecting **Unarchive scenario** from the **Actions ▼** dropdown within the scenario itself.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles:** Recruiting editor | Owner | Technical owner

5.5.2. Headcount planning

ChartHop's headcount planning tools provide a framework for proposing and approving changes to your established ChartHop organization.

ChartHop addresses headcount planning using a bottom-up approach:

1. You identify the needed resource change(s) for your organization.
2. You create a proposal for the changes using a scenario. **Learn more.**
3. You use this scenario to project and analyze the future impact of the proposed changes.
4. You share and review the scenario with key stakeholders and receive their feedback.
5. Once you have stakeholder approval, you merge the proposed changes to your current organization.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

> **Roles:** Recruiting editor | Owner | Technical owner

5.5.2.1. Creating new jobs in a scenario

As part of managing your organization and preparing your headcount plans, you can use the **Org Chart** in your scenario to create new jobs or upload a spreadsheet of new jobs to your scenario.

Anyone who has been given access to the scenario can make changes.

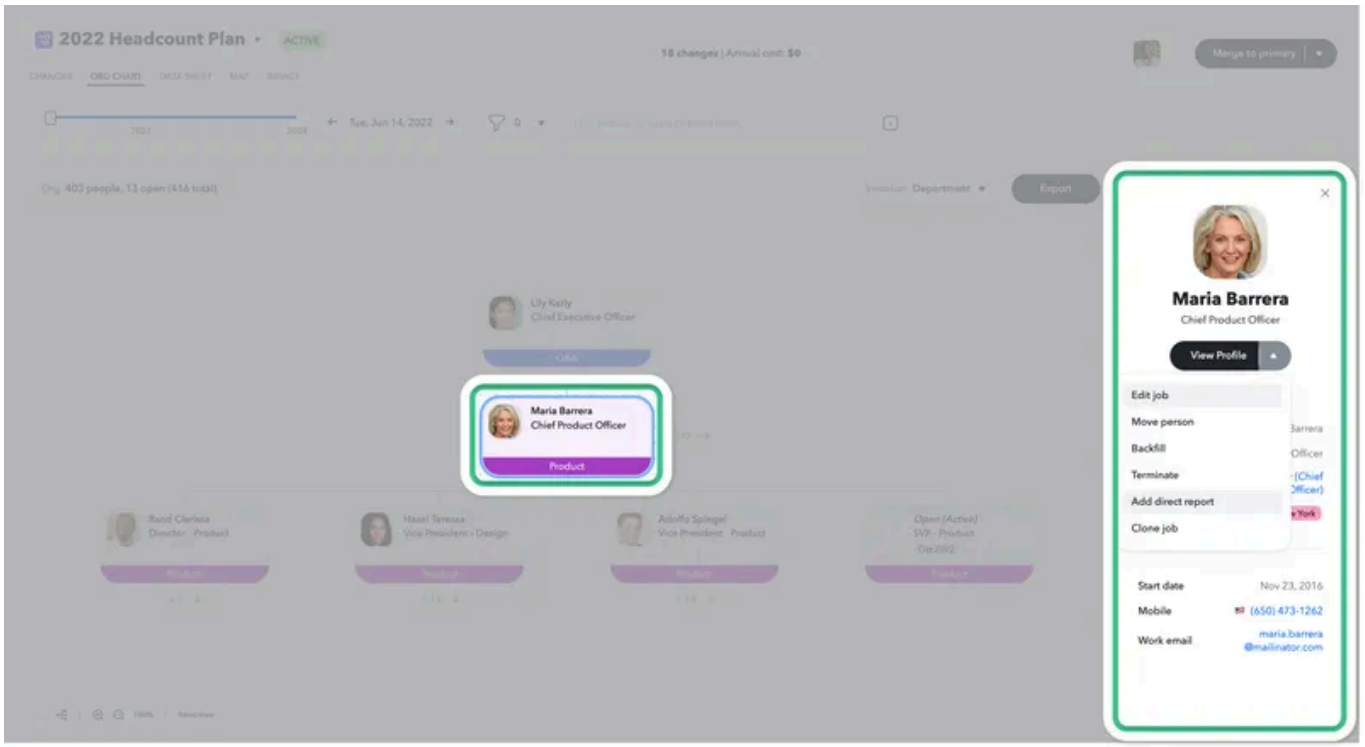
This section includes the following topics:

- Creating individual jobs in a scenario
- Creating multiple jobs in a scenario

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.1.1. Creating individual jobs in a scenario

In the **Org Chart** within your scenario, you can quickly add a new job to your headcount planning scenario by adding a direct report or by cloning an existing job.



Add a direct report in a scenario

To add a new direct report for the currently selected role:

1. Within your scenario, select the **Org Chart** tab.
2. In the **Org Chart**, select the employee for whom you'd like to create a new direct report.
3. In the profile summary that displays, select the arrow button to expand the dropdown menu.
4. Select **Add direct report**. The **Create job** dialog displays.
5. In the **Create job** dialog, add your job detail information to the appropriate sections:
    - **Structure** - General information about the role, including title, department, and location.
    - **Compensation** - Compensation information about the role, including salary and bonuses.

- **Recruiting** - Recruiting information about the role, including hiring status and start date.
- **Description** - A general description about the role.

6. Select **Save to Scenario**.

> If you do not see your new job in the **Org Chart** after saving your changes, double-check the Start Date for the job and use the Timeline feature to update the **Org Chart** to the appropriate date.

Clone a job in a scenario

You can also create new jobs in the **Org Chart** by cloning existing jobs. This is helpful for instances where you don't need to make extensive changes to the existing job details and description.

To clone an existing job:

1. Within your scenario, select the **Org Chart** tab.
2. Select the employee or open job you'd like to clone.
3. In the profile summary, select the arrow button to expand the dropdown menu.
4. Select **Clone Job**. The **Create Job** dialog displays.
5. Make any edits to the details of the newly cloned job.
6. Select **Save to Scenario**.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.1.2. Creating multiple jobs in a scenario

In a headcount planning scenario, you can create multiple jobs at once by creating a CSV file and then importing that CSV file to your scenario.

Create a hiring plan in your scenario using a CSV

Create a spreadsheet that contains the information for each job you want to add to your scenario. The following information should be included for each new job:

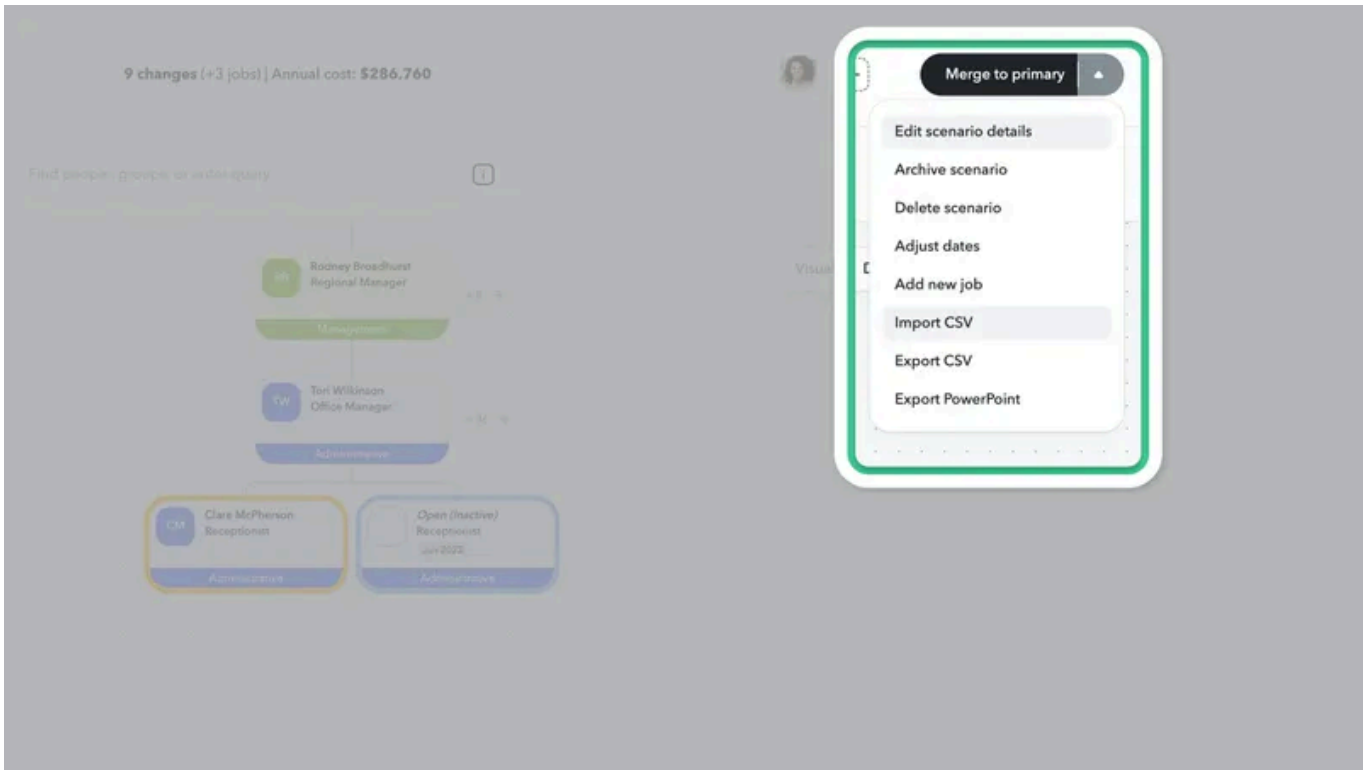
- Title
- Start Date
- Manager

Be sure to save the spreadsheet as a CSV file. The data headers in your CSV must match the code names in your organization.

> For more information on preparing your spreadsheet, check out our guide to adding or updating a hiring plan. **Learn more.**

Import a CSV to your scenario

After you've created your CSV file, upload your completed spreadsheet to your scenario.



To import your CSV:

1. From the scenario details, select the **arrow** button to display the dropdown menu.
2. Select **Import CSV**. The **Upload CSV To Scenario** dialog displays.
3. Select **Hiring Plan** as the type of data you're uploading.
4. Browse and select your CSV file.
5. Select **Upload**. The time it takes to upload may depend on the size of your spreadsheet. Once the import is complete, a confirmation message displays.

Troubleshooting

If you are unable to upload your CSV successfully, try the following:

- Check for typos and extra spaces in your CSV's cells.
- Try resubmitting your CSV.

> If you are still unable to complete this process after attempting the troubleshooting options above, reach out to **support@charthop.com**.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.2. Editing jobs in a scenario

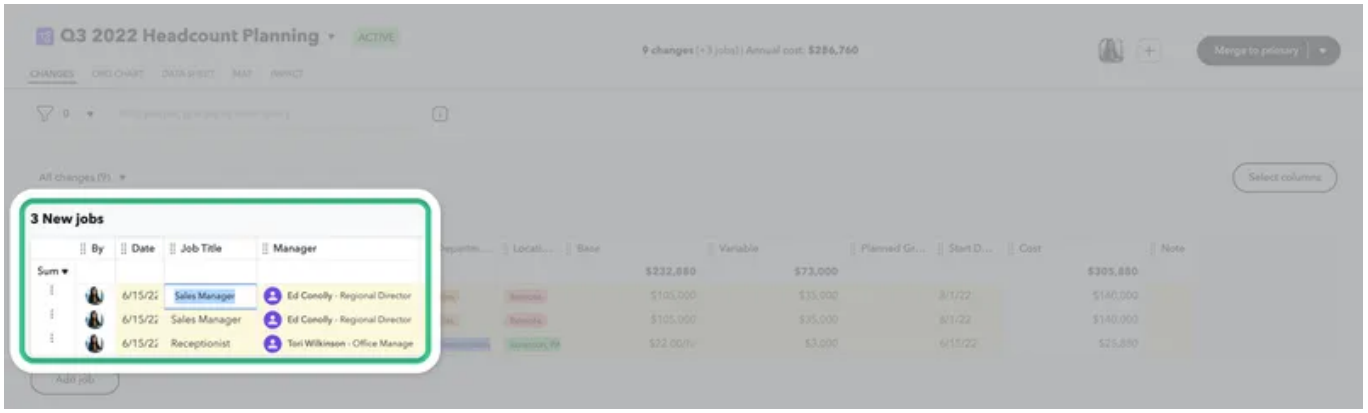
In your headcount planning process, you can edit jobs within your scenario using the following methods:

- Edit jobs from the **Changes** tab - You can make changes within the context of your previously-made scenario changes.
- Edit jobs from the **Data Sheet** tab - You can make new changes to your scenario (which are then reflected in the **Changes** tab). You can also edit multiple jobs from the **Data Sheet** tab. When editing jobs from the **Data Sheet** tab, you can use ChartHop filters to further streamline the process.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.2.1. Edit jobs from the Changes tab

Use the **Changes** tab to edit a job that you have previously added or changed in your headcount planning scenario.



Edit a job from the Changes list

You can edit a specific job field directly from the list.

To make edits in the table:

1. Select a cell.
2. Enter a new value or use the dropdown list to select from available options.
3. Press Enter or select outside the cell to save your edits.

Edit a job from the action menu

When you have to make more extensive edits to a job, you can access the **Edit job** dialog from the action menu.

To edit a job from the action menu:

1. Open the action menu at the left side of the row of data you wish to edit.
2. Select **Edit job**. The **Edit job** dialog displays.
3. Make your edits in the **Edit job** dialog.
4. Select **Save to Scenario**.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.2.2. Edit jobs from the Data Sheet tab

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

Use the **Data Sheet** tab when you want to edit a job that you have not previously added or edited within your scenario or when want to edit multiple jobs.

To edit jobs from the **Data Sheet** tab:

1. Filter the data that displays in the data sheet by either:
    - Entering a Carrot query within the filter text box
    - Selecting the funnel icon to select quick filter criteria in the **Filter** dialog
2. Select the **Edit** button.
3. Select the cell(s) you wish to edit. You can only edit highlighted cells.
4. Make your edits.
5. Select **Save Changes** when you are done.
6. In the confirmation window, select **Save to Scenario** to incorporate the changes into your scenario.

You must select **Save to Scenario** before exiting the dialog to save your edits. Opening the context menu will clear out any previous unsaved changes to your data sheet.

To make more extensive edits to a job, select the button with the three dots at the left side of the row of data you wish to edit. From the action menu that displays, click **Edit job** to display the **Edit job** dialog.

5.5.2.3. Working with open jobs in a scenario

You can use your headcount planning scenario to propose changes in your ChartHop organization's internal structure when hiring and filling open jobs.

This section includes the following topics:

- Move a person in a scenario
- Exchange a job in a scenario
- Fill a job in a scenario

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.3.1. Move a person in a scenario

You can propose a new assignment for a person in your ChartHop organization by moving that person to an open job within your scenario.

To move a person into an open job:

1. In the **Data Sheet** tab, select the row for the employee you'd like to move.
2. Open the action menu at the left side of the row you wish to edit.
3. Select **Move person**. The **Move Person** dialog displays.
4. In the **Moving into job** dropdown list, select the job into which you are moving the person.
5. Enter the following information:
    - **Move date** - The date on which the move will take place.
    - **Announce date** - The date on which the move is announced to the organization.
    - **Move type** - Whether the move is considered a Transfer, Promotion, or Demotion.
    - **Additional notes** - Any additional notes related to the move.
6. Select **Save to Scenario** to save your changes.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.3.2. Exchange a job in a scenario

In your headcount planning scenario, you can exchange jobs between two people.

> When you exchange jobs between two people, ChartHop counts the action as two connected moves. If one job is removed, the other job is also removed.

To exchange jobs between two people:

1. From the **Data Sheet** tab, select the row for the employee you'd like to exchange.
2. Open the action menu at the left side of the row you wish to edit.
3. Select **Move person**. The **Move Person** dialog displays.
4. In the **Moving into job** dropdown, select the occupied job into which you are moving the person.
5. Enter the following information:
    - **Move date** - The date on which the move will take place.
    - **Announce date** - The date on which the move is announced to the organization.
    - **Move type** - Whether the move is considered a Transfer, Promotion, or Demotion.
    - **Additional notes** - Any additional notes related to the move.
6. Select **Save to Scenario** to save your changes. Once you save your changes, the jobs are exchanged in your scenario.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.3.3. Fill a job in a scenario

You can propose to fill an open job in your scenario by assigning the job to a current member of your ChartHop organization or a potential new hire.

To fill a job in a scenario:

1. From the **Data Sheet** tab in your scenario, select the row for the open job you'd like to fill.
2. Open the action menu at the left side of the row you wish to edit.
3. Select **Fill job**. The **Fill job** dialog displays.
4. In the **Person** dropdown, select an employee from your ChartHop organization to fill the open job.
    - If the person is not currently in your ChartHop organization (for example, when the person is a new hire), then select the **New Hire** link. This displays the **New Hire** dialog where you can enter information for the new hire. Only the **First name** and **Last name** fields are required. Once you're finished, click **Save**. The job is filled with the entered new hire.
5. Enter the following information:
    - **Start date** - The start date for the person filling the job.
    - **Move type** - Whether the move is a transfer, promotion, or demotion.
    - **Notes** - Any additional notes regarding the move.
6. Select **Save to Scenario** to save your changes.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.4. Updating current jobs in a scenario

In addition to planning a hiring process, you can also use a headcount planning scenario to propose changes to your current employee roster.

This section includes the following topics:

- Terminations
- Backfills

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.4.1. Propose a termination in a scenario

In your headcount planning scenario, you can propose to terminate an employee. Terminating an employee can archive both the employee and their role.

To propose a termination:

1. From the **Data Sheet** tab, select the row for the person you are terminating.
2. Open the action menu at the left side of the row you wish to edit.
3. Select **Terminate**. The **Terminate person** dialog displays.
4. In the **Terminate Person** dialog, enter the following information:
    - **Last day** - The person's last day in the system.
    - **Announce data** - The date when the departure will be visible in the org chart.
    - **Departure type** - The conditions of the departure.
    - **Backfill job** - Determines whether the position will remain open.
    - **Regrettable** - Whether the departure is regrettable by your org. This information is only visible to users with access to sensitive data. **Learn more.**
    - **Reason** - The reason for the termination.
    - **Notes** - Additional notes regarding the termination.
5. Select **Save to Scenario** to save your changes.

> Once the scenario is merged to primary and the termination goes into effect, terminated employees cannot be queried in the **Data Sheet**. However, they display in the **History tab** when you filter for departures.

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.2.4.2. Create a backfill in a scenario

When you backfill a job in a scenario, the person's profile is archived but the job stays active and open.

To backfill a job:

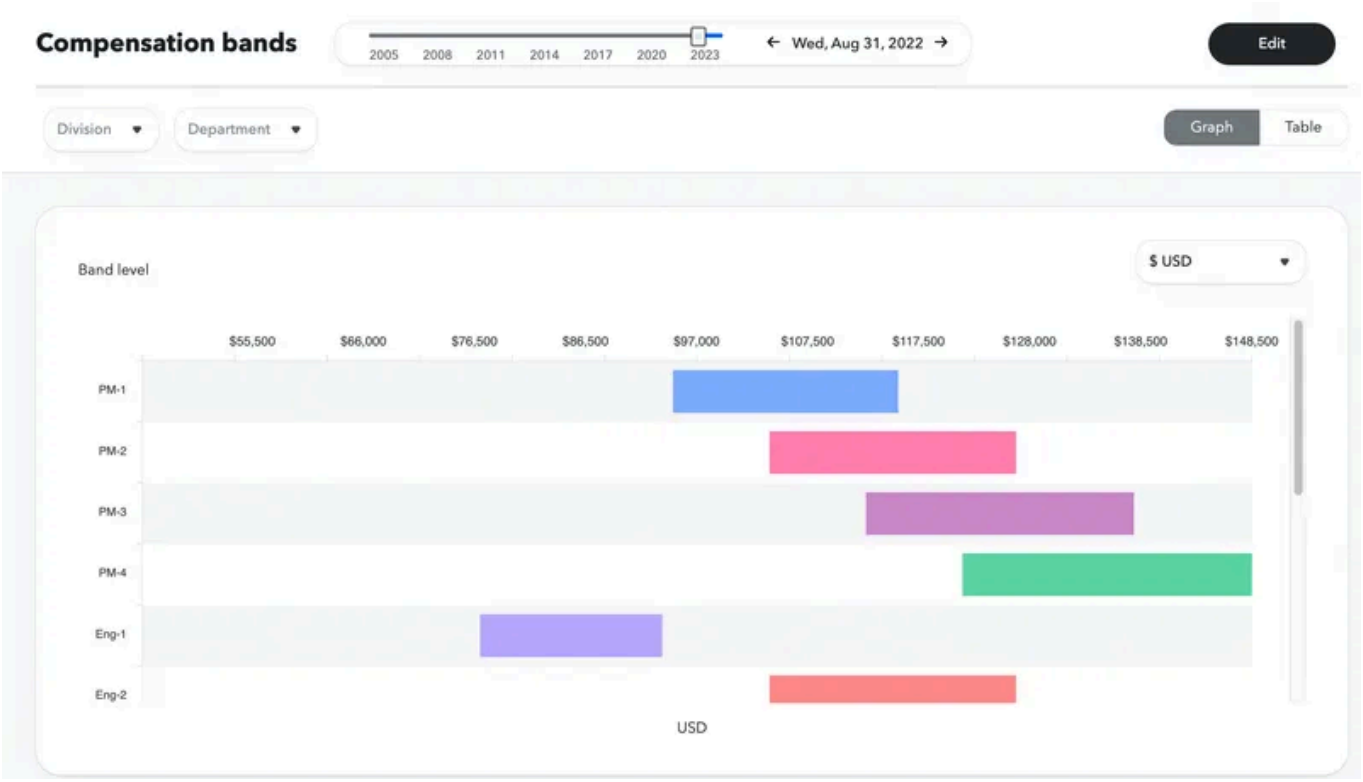
1. From the **Data Sheet** tab, select the row for the person whose job you wish to backfill.
2. Open the action menu at the left side of the row you wish to edit.
3. Select **Backfill**. The **Backfill job** dialog displays.
4. In the **Backfill job** dialog, you can make any additional edits to the job:
    - **Structure** - The job's position in your ChartHop organization structure.
    - **Compensation** - Adjusted compensation for the role.
    - **Recruiting** - Recruiting information for the role.
    - **Description** - The role's new description (when applicable).
5. Select **Save to Scenario** to save your changes.

> In cases where the backfill should not display to the rest of your ChartHop organization, be sure to set the recruiting sensitivity to **Highly sensitive**. This ensures that only recruiters with sensitive access can see the open role. **Learn More.**

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.5.3. Compensation bands

ChartHop allows you to establish and maintain salary bands for your organization. Having well-defined compensation bands is the foundation that ensures you can retain your best talent, enable good hiring practices, and pay your employees fairly.



Compensation bands

You have the flexibility to configure your compensation bands to fit your organization's needs. This allows you to use ChartHop to match how your organization is currently tracking compensation.

You must have the Owner role in order to set up compensation bands. The following roles can view bands, but not edit them: Org editor, Recruiter, Sensitive data viewer, and Compensation viewer.

Compensation band information is divided into three aspects that you can define:

- Base, equity, and variable pay amounts
- Structure (department/team/group) and location multipliers
- Job level

Keep in mind that your organization may not use all of the components that ChartHop provides for compensation bands. For example, your companies might not have hourly employees or include equity as a part of your band structure.

Base, equity and variable pay

You can configure base pay ranges for annual salaries and/or hourly wages by specifying the minimum and maximum values for the range or by specifying a midpoint with a percentage spread. A target salary can be provided as guidance to recruiting or finance teams for new hires when it differs from the midpoint of the range.

Equity is represented by a single target value instead of a range. This value can be specified in shares, monetary amounts, or as a percentage of the actual base pay (not the band range).

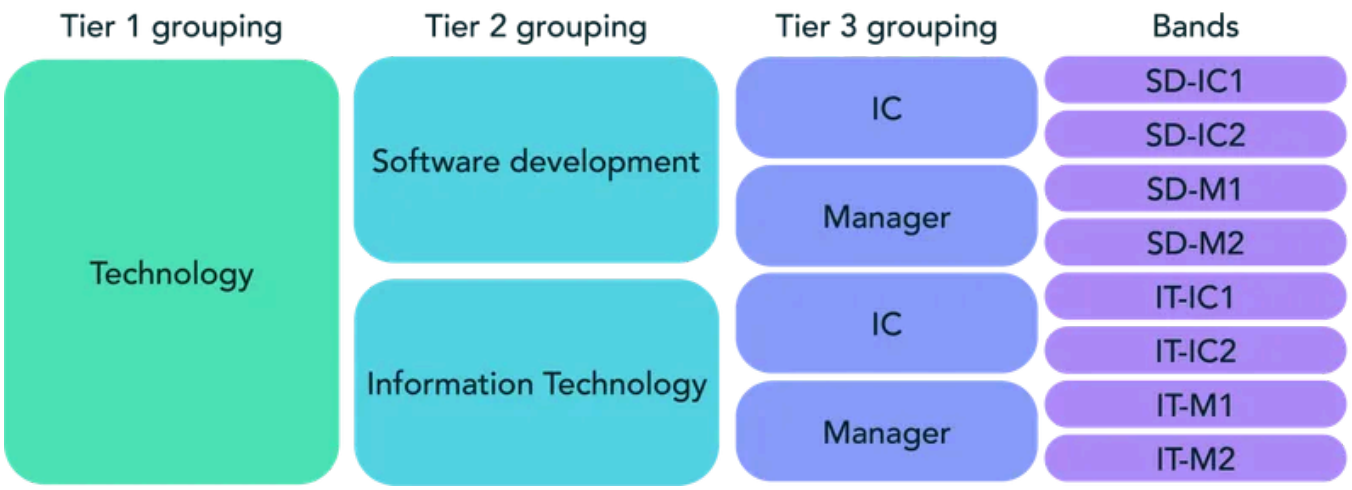
Variable bonus is represented by a single target value instead of a range. This value can be specified in monetary amounts or as a percentage of the actual base pay (not the band range).

Equity and variable components are optional for all bands.

Organizational structure

You can configure a hierarchical representation for your bands that matches your organization's structure. This structure helps organize and filter your bands. The grouping names you choose are meant to reflect the naming structure of your company.

For example, you could have a top-tier grouping called Technology which the Software development and the Information Technology divisions are both organized underneath. The example below further refines the structure by using career paths, such as IC (individual contributor) or manager, as the lowest-level grouping.



Example groupings

> Setting up groupings is optional - you can choose to skip this section during the wizard.

Locations

Location multipliers allow you to reduce or increase a compensation band's value based on an employee's geographical location or cost of living. To use location multipliers, you must currently be storing location information for your employees in ChartHop. If you aren't storing location data in ChartHop, this band component isn't available to you.

How location multipliers work: a worked example

Suppose you have a **Software Engineer** band with a base pay range of **$120,000–$160,000**, anchored to a baseline location (for example, Austin, TX).

If you configure a location multiplier of **1.10x** for New York City, ChartHop will automatically apply that multiplier to the band for employees in that location:

Location	Multiplier	Adjusted Range
Austin, TX (baseline)	1.00x	$120,000 – $160,000
New York City	1.10x	$132,000 – $176,000
Denver, CO	0.90x	$108,000 – $144,000

This means that when a manager or recruiter views the band for a New York-based Software Engineer, they will see the adjusted range — not the baseline range — so

compensation decisions always reflect local market rates without requiring manual calculation.

> Multipliers apply to the entire range (minimum, midpoint, and maximum), not just the midpoint. A multiplier greater than 1.0 increases the range; a multiplier less than 1.0 decreases it.

Job levels

Job levels are a way to map your compensation bands to a standard level of performance within your organization.

ChartHop allows you to use an industry-standard either directly, indirectly, or not at all. You can either:

- directly adopt one of the industry standards, such as Radford or Option Impact,
- create your own job levels and map them to an industry standard,
- or decide to use custom names and choose not to map them to industry-standard names.

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

> **Roles**: Owner | Org editor

5.5.3.1. Using the Compensation bands wizard

When you configure your compensation bands in ChartHop, you use a wizard that allows ChartHop to provide you with a custom spreadsheet template that you can then use to upload your compensation band information. The answers you provide allow ChartHop to create your bands and identify how they map to your organizational structure, including target pay, currency, location multipliers, and so on.

Once you have completed the wizard, you can download a spreadsheet that matches your exact requirements and fill in the values you need, including target pay, job levels, and locations/multipliers. Uploading the spreadsheet and cleaning up any data is the final step.

> Only users with the Owner or Org editor role can access the Compensation bands wizard.

To create compensation bands:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Select **Let's Get Started** to view the setup questionnaire.
4. Complete the questionnaire.
    - You can navigate forward or backward to update your answers.
    - Compensation band tiers are based on built-in or custom fields (for example, Department).
    - If you don't have the field you need, you can select **Add a new field** to create a new custom field to use as a compensation band tier.
    - When you're finished, a table displays a preview of all the columns that are included in your spreadsheet.
5. Select **Download** to download the customized spreadsheet.
6. Complete the spreadsheet with your compensation data. **Learn more.**
7. When you are ready to upload, return to the **Compensation bands** section to upload your spreadsheet and select **Next step**.

8. Use the **Tidy up your data** page to review and correct any mistakes in your data. Then select **Next step**.
9. Select **Save**.
10. Choose a date when you want your bands to be effective. Assigning an effective date helps you track the history of your compensation bands as your organization grows.
11. Select **Save**. Any warnings/errors that may have occurred display on this screen.
12. (Optional) Select **View pay bands** to view your bands or select **Map your jobs to bands** to begin mapping your bands to your existing jobs. Learn more.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

Roles: Owner | Org editor

5.5.3.1.1. Complete your Bands spreadsheet

After you've completed ChartHop's compensation band wizard, you download a custom spreadsheet to use to input your compensation data according to the parameters you defined.

This topic provides information about how to complete your spreadsheet. Remember that your spreadsheet may not include all of these columns and instead represents the answers you provided in ChartHop's questionnaire.

Each row in your spreadsheet represents a separate compensation band within your organization and can have unique values for that band, including whether the band is for hourly or salaried employees, includes equity, and what job level uses the band. The spreadsheet automatically validates that your values are entered in the right format.

Because ChartHop customizes your compensation bands according to your needs, the spreadsheet you download may not include all columns listed on this page.

> After importing your initial compensation band data, you can reference the data in ChartHop through reports, forms, complex filters, and more using the **Carrot Query Language** or specific Built-in fields.

Structure and Base Pay tab

This tab is included in all spreadsheets, although the columns vary according to your choices in the questionnaire.

Column	What it means	Example values
Top-level tier	The first column represents the top-level tier you indicated and is named to match the field you chose in the questionnaire.	Example: Department
Second-level tier	Represents the second-level tier you indicated and is named to match the field you chose in the questionnaire.	Example: Information Technology
Third-level tier	Represents the third-level tier you indicated and is named to match the field you chose in the questionnaire.	Example: Job Function
Pay time period (salary or hourly)	The pay time period for your exempt and/or your non-exempt employees' base pay.	Salary Hourly
Hours per week / Weeks per year	Values used to calculate the annualized equivalents for hourly bands	40 / 52
Band Minimum	The monetary amount that defines the lower bound of the band’s base pay.	Salary example: $130,000 Hourly example: $50
Band maximum	The monetary amount that defines the upper bound of the band’s base pay.	Salary example: $70000 Hourly example: $35
Midpoint	The midpoint value in the band’s range. Will be calculated automatically if the base band’s minimum and maximum are specified. Is required if “percentage spread” is to be used.	Salary example: $100,000 Hourly example: $42
Percentage spread	The percentage above and below the midpoint that defines the upper and lower bounds of the band.	A value of 30% with a midpoint of 100,000

Column	What it means	Example values
		would create a pay range of $70,000-$130,000.
Target salary	A goal value for the band which may be different from the midpoint. Provides guidance to recruiting or finance teams for new hires. For example, some teams may target the 70th percentile in their band range, rather than the midpoint.	Salary example: $90,000 Hourly example: $40
Target salary percentile	A goal percentile for the band which may be different from the midpoint. Provides guidance to recruiting or finance teams for new hires. For example, some teams may target the 70th percentile in their band range, rather than the midpoint.	70%
Job level	The name of the universal job level associated with this band. The name must exactly match job levels listed on the Comparable job levels tab OR the custom job levels you defined on the Job Levels tab.	
Currency	The currency for the base pay of the given band. Indicate currency using the **standard indicators**.	Example: USD
Equity target	The amount of equity for the given band. Leave blank if the band does not have an equity component. You can enter equity in three ways: flat money value, shares, or percentage of base.	100 shares
Variable target	The amount of variable pay for the given band. Leave blank if the band does not have an variable component. You can enter equity in two ways: flat money value or percentage of base.	Flat money value: $10,000 Percentage of base: 15%
Variable currency	The currency for the variable bonus of the given band. Indicate currency using the **standard**	Example: USD

Column	What it means	Example values
	indicators.	

Multipliers and Location Multiplier mapping tabs

The **Multipliers** and the **Location Multiplier mapping** tabs are available only when you store location information in ChartHop and select to apply location as a multiplier in the compensation bands questionnaire.

These tabs automatically pull in your existing ChartHop locations and allow you to define multipliers for each. You can use the same multiplier for similar locations. For example, locations such as San Francisco and New York may be included in the same multiplier.

Multipliers tab

Use the **Multipliers** tab to define any multipliers you need.

Column	What it means	Examples
Multiplier name	The name of the multiplier you want to define. For example, New York and San Francisco may be included in a multiplier called "Max Cost".	Example values: Max Cost US West
Differential value (%)	The amount of the adjustment for the multiplier. Express this as a percentage to multiply by. This column is required for all locations/rows. If there is no multiplier applied to a given location, enter the value as 100.	Example value: 125

Location Multiplier Mapping tab

Use the **Location Multiplier mapping** tab to map the multipliers you defined to the ChartHop locations included in your organization.

Column	What it means
ChartHop Locations	The locations in this column are pulled from your ChartHop instance. Do not change these. If you don't want a multiplier for a particular city, you can leave that row blank.
Multiplier	Enter one of the multipliers that you defined on the Multipliers tab. If you don't want a multiplier for a particular city, you can leave that row blank.

Job levels tab

The **Job levels** tab is available only when you choose to customize your job level names.

When you customize your job level names, you can still map them to industry standard levels. For example, you can choose to have simpler names for your job levels, such as L1, L2, or L3, and map these custom names to an appropriate level within your selected industry standard.

To map custom names to an industry-standard level, fill out the Custom job level column in the **Job levels** tab, and then choose an industry-standard level to use.

If you didn't choose to map your bands to an industry standard, you just need to create your job level names on this tab. Each row should contain a job level name.

Column	What it means	Examples
Custom job level	The name of your custom job level.	L1
(Industry - standard level)	This column is either named Radford level or Option Impact level. This column is not included if you chose to create custom job level names without mapping to a standard.	Choose from the pre-populated list of level names.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

Roles: Owner | Org editor

5.5.3.2. Connecting bands to jobs

After you create compensation bands, you can assign each job in your organization to a band by uploading a spreadsheet that maps your existing employees to the band to which they belong. This method allows you to map all of your jobs to bands at the same time.

Alternatively, you can associate an individual job with a band by selecting **Edit Job**, selecting the **Compensation** tab, and selecting a band from the dropdown list.

> Compensation bands can display in the job details for those with the appropriate sensitivity access. If your organization previously entered bands without the use of the Compensation Band wizard, you'll see a **Band (legacy)** field when editing a job. This field is for information only and you cannot be edited.

Create a job-band mapping spreadsheet

You'll need a list of the work emails associated with each job you want to map, as well as which band applies to each job. You can also map to a job ID instead of a work email if you want to add a band to an unfilled job.

To create your spreadsheet:

1. Create a spreadsheet (.csv or .xlsx) that includes the following two columns:
    - An identifier column (for example, work email or job ID)
    - A column named `compBand`
2. Add a row for each job you want to connect to a band and add values for both the job (work email or job ID) and the compBand.

Upload your spreadsheet

After you've created a spreadsheet to help you map your jobs to the bands you created, upload the spreadsheet to ChartHop to complete the mapping. You can make any individual changes by editing the respective job.

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.

3. Click **Edit** in the top right corner.
4. In the **Map your jobs to your band levels** section, select **Upload mapping**.
5. Select **Save Settings**.

Verify that your bands are mapped

You can use the **Data Sheet** to verify that you've mapped your bands to their respective jobs.

To verify bands are mapped:

1. From the left sidebar, select **Data Sheet**.
2. Select **Select columns**.
3. In the **Select columns** dialog, select the checkbox for the **Comp Band** field.
4. Select **Apply**. This displays compensation bands on the **Data Sheet** as a column.
5. Review the rows to view band information for employees and open jobs.

> Once you've configured your compensation bands, you can also create custom field mappings with our help to export your compensation bands to your external systems. For more information, please reach out to your ChartHop Customer Success Manager.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

> **Roles**: Owner | Org editor

5.5.3.3. Updating compensation bands

You can update your compensation bands as your organization changes. For example, you may need to add a compensation band for a new function brought into the organization.

If you need to add, delete, or rename individual bands, you can do so by downloading your current bands in spreadsheet form. You can then make any changes and re-upload the spreadsheet to import the changes.

You can make global changes by renaming org levels, setting currency rounding, or changing multipliers by editing global settings.

Updating bands with a spreadsheet

To delete or add new compensation bands, you can download, edit, and re-upload a spreadsheet. This is helpful when making significant changes to particular bands.

To update your bands with a spreadsheet:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Click **Edit** in the top right corner.
4. Click **Import changes** under the **Import changes via spreadsheet** section.
5. Click **Download template with current data** to view your current band information in spreadsheet format. The downloaded spreadsheet is pre-filled with your current band information.
6. Edit the spreadsheet you downloaded with any changes you wish to make. You can make the following types of changes:
    - Add a new band to the spreadsheet.
    - Delete an existing band by typing DELETE in the first column of the band. Deleting a band removes it from any previously mapped jobs.
    - Edit an existing band by changing any number of the columns associated with the band. The provided spreadsheet is pre-filled with your current band information. You may edit this spreadsheet directly to reflect changes to your bands.

7. When finished making changes, navigate back to the **Import changes via spreadsheet** section.
8. Select **Browse** to navigate to your updated spreadsheet to upload or drag it to the **Upload Spreadsheet** section.
9. Select **Next Step**.
10. Use the **Tidy up your data** page to review and correct any mistakes in your data.
11. Select **Next step**.
12. Select **Save**.
13. Choose a date when you want your bands to be effective. You must set the date in the future (for example, set it to the following day) so that the compensation bands do not overlap.
14. Select **Save**.

> You can also make changes to your job levels and multipliers using the spreadsheet upload.

Enable currency rounding

You can set rounding rules for each specific currency so that monetary amounts are easier to read in tables and graphs. When you enable currency rounding, it only affects the value that is displayed, not the actual amount.

To enable rounding for a currency:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Click **Edit** in the top right corner.
4. In the **Currency rounding** section, select **Add currency**.
5. Use the **Currency** dropdown to select the currency for which you want to enable rounding. Only the currencies that are currently configured for your organization are available for selection. **Learn more.**
6. Enter the value to round to for the respective currency. For example, you can set the rounding to be to the nearest 1000 units of currency.
7. Select **Save Settings**.

Update hourly wage amounts

You can change the amount calculated for hourly wages by updating the number of hours and weeks worked during your work year. For example, if you move from a 40-hour work week to a 30-hour work week, you can update that value and your annualized hourly wages update accordingly.

To update hourly wage amounts:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Click **Edit** in the top right corner.
4. In the **Update hourly wage amounts** section, update the value for either hours per week or weeks per year.
5. Select **Save Settings**.

Edit multipliers

You can edit multipliers within ChartHop whenever you need to. For example, you may start hiring employees in different regions and may need to add a multiplier to ensure fairness and accuracy for your salary ranges across the company. Or, you may want to further organize multipliers by using additional categories based on specific geographic regions.

To edit multipliers:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Select **Edit** in the top right corner.
4. Select the **Multipliers** tab.
5. Use the fields to edit the multiplier parameters. You can edit the following:
    - **Label** - Identifies the multiplier.
    - **Multiplier percentage** - Indicates the percentage applied as a multiplier.
    - **Mapped fields** - Indicates the fields to which the multiplier is mapped.
6. Select **Apply Changes**.

You can use the trash can icon to delete a multiplier. To create further categories of multipliers (for example, multipliers for Europe-based locations), select **Add category**.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

Roles: Owner | Org editor

5.5.3.4. Retire compensation bands

If you want to start over and establish a new set of compensation bands, you can retire all your compensation bands so that they are no longer in effect.

To retire your compensation bands:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Select **Edit**.
4. In the **Settings** tab, navigate to the **Retire** section.
5. Select **Retire compensation bands**.
6. Select an effective date on which all compensation bands are retired.
    - All compensation bands on or before the date you select will be retired.
7. Enter **RETIRE** to confirm.
8. Select **Retire**.
    - All compensation bands, tiers, job levels, and multipliers are retired and no longer in effect. You can use the date slider in ChartHop to view retired compensation bands.
    - Any jobs previously mapped to the compensation band will no longer show the compensation band.

> Overlapping the effective dates of multiple compensation bands may lead to errors.
>
> ChartHop recommends retiring compensation bands on a date that does not overlap with the effective dates of any new compensation bands. For example, suppose you are retiring a set of compensation bands today. When uploading a new set of compensation bands, define the effective date for tomorrow or another date in the future, so there is no overlap.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

Roles: Owner | Org editor

5.5.3.5. Troubleshooting compensation bands

This section provides answers and solutions to potential questions and issues you may run into when setting up your compensation bands in ChartHop.

Compensation bands setup

What if I don't have unique names for each band ID?

All compensation bands must have unique names. If your names are not unique, ChartHop recommends creating a repeatable system of naming conventions for your compensation bands.

Why don't I see the location multiplier option?

The location multiplier displays only when you have location data already populated within ChartHop.

Where do locations come from?

The locations that display for multiplier configuration are populated from the location groups you create in ChartHop. To view or add a location group, from the left sidebar, select the Settings (gear) menu and select **Groups**. Select the **Location** tab to view all your defined locations.

What if my job levels aren't exact matches with Radford or Option Impact? Do I still have to map to those market job leveling systems?

When setting up your job levels in the questionnaire, in the **Job level source** dropdown, select **In-house job leveling system**. In the **Comparable market job level system** dropdown, select **None / Other**. Setting up your job levels with these options allows you to specify custom names for your job levels and skip any mapping to Radford/Option Impact.

Can I modify the spreadsheet I downloaded from the wizard?

No, do not modify the headers or order of the columns in the spreadsheet. Do not add or delete any columns. ChartHop validates your compensation data based on the included column headers. To change the options that are included in the spreadsheet, feel free to go back through the wizard and adjust your questionnaire selections. If you've already completed the wizard, see the following question and answer.

I forgot to select an option during the questionnaire setup - how do I go back and add it?

Unfortunately, the spreadsheet columns are set once you complete the initial setup. ChartHop recommends the following workaround:

1. From the left sidebar, select **Data Model**
2. From the sub-menu, select Job Architecture > **Compensation Bands**.
3. Select **Edit** to display the Edit compensation bands settings.
4. Select **Import changes**.
5. Select **Download template with current data**.
6. Return to the Edit compensation bands settings.
7. In the **Delete** section, select **Delete all compensation bands** to deactivate the current set of compensation bands.
8. After you confirm the compensation bands have been deleted/deactivated, repeat the setup wizard process again.
    - Please be sure to select the same options (or as similar as possible) as you did in your previous configuration.
    - Select the new option(s) you want to add.
9. Download the new spreadsheet that is generated.
10. Copy the data from your previous spreadsheet into the new spreadsheet.
11. Upload the new spreadsheet with the updated compensation band options.
12. When you set an effective date, you must set the date in the future (for example, set it to the following day) so that the compensation bands do not overlap.

Can I upload my compensation bands spreadsheets using the standard .csv importer?

No, your compensation bands spreadsheets must be uploaded either within the compensation bands wizard or within the Edit compensation bands settings.

There's empty fields in my spreadsheet - should I enter values in those fields?

No, that is not necessary. For example, if you selected both Hourly and Annual with different specification formats for each, you only need to fill out the columns that correspond to each of those specific formats.

I opened the downloaded spreadsheet in Numbers (instead of Excel) and I'm seeing weird formatting and formulas?

ChartHop recommends using Excel for filling out your downloaded spreadsheet. However, if necessary, you can still use Numbers to enter your compensation band data. The spreadsheet will automatically validate that the values you enter are in the right format and once you upload to ChartHop, there is an additional data tidying-up step to help make sure your data is uploaded correctly.

I selected Save and nothing seems to happen.

If you have a lot of compensation bands (for example, more than 300), it can take a while to upload all of your data. This can take anywhere between 30 seconds to a couple of minutes.

The compensation bands wizard is stuck on a step and I can't move forward in the setup process.

Please reach out to ChartHop customer support for help with technical issues during setup.

Using compensation bands

How do I connect employees or jobs to compensation bands?

Once your bands are created, you can select **Map your jobs to bands** at the end of the wizard or select **Edit** and select **Upload mapping** within the Edit compensation bands settings.

Do I have to map compensation bands to every job?

No, you do not have to set compensation bands for every job. However, you must map a compensation band to every job that you do want to be associated with one, either using the spreadsheet or manually within the **Compensation** tab of the **Edit Job** dialog.

Can jobs automatically be updated with the corresponding compensation band based on job title?

Unfortunately, not at this time.

What happens to the compensation band if a person leaves a job?

Compensation bands are associated with jobs, not the individual, so it will continue to remain associated and visible. Please keep this in mind if the compensation band should change for the next hire or if you don't want the new hire to see the job's previous band.

What determines the order of compensation bands in the generated spreadsheet and on the graph view?

Compensation bands display in the order you enter them in the downloaded spreadsheet.

What are the "with multipliers" fields?

When your ChartHop organization uses built-in multipliers, the "with multipliers" versions of fields display the value of the underlying field (for example, Comp band base minimum) with any applicable multipliers already applied.

Can I expand access to compensation bands beyond those with Sensitive access?

Unfortunately, not at this time.

Editing compensation bands

Does my spreadsheet have to include all my compensation bands when editing or can I just add the new ones I wish to create?

You must currently include all compensation bands rows to prevent potential error messages.

Why did the dropdown/formatting disappear when I have the downloaded spreadsheet open in Excel?

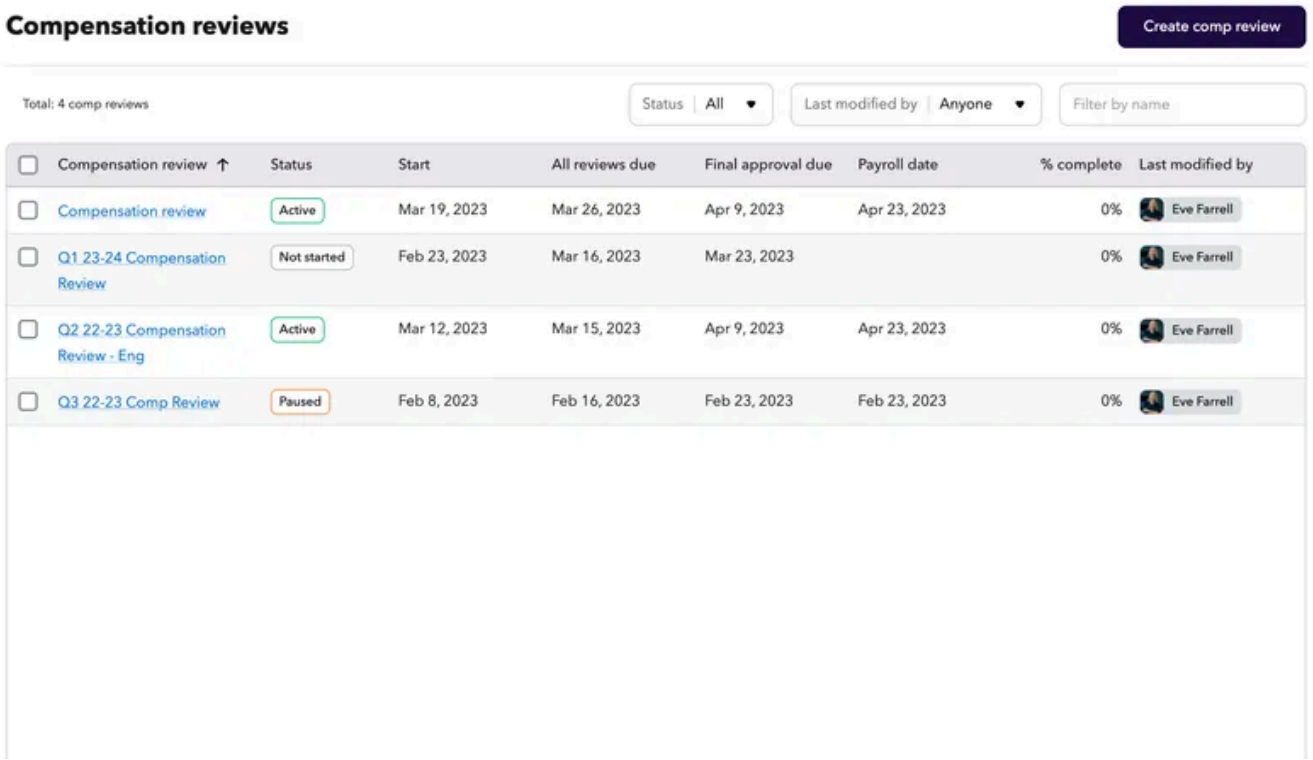
Formatting is applied only to the first 999 rows. If you have more than 1000 compensation bands, you must copy the formatting to those blank rows before proceeding.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6. Compensation reviews

You can use *Compensation reviews* to create and manage a centralized compensation review cycle completely within ChartHop.

Within a compensation review, you can create budgets, guidelines, and implement approval flows that you can customize to fit the needs of your organization. You can establish a timeline for your compensation review cycle, collaborate with managers and approvers, and clearly visualize the impact of compensation changes to your organization. All of these tools enable you to build and implement a more transparent and equitable compensation plan.



Access compensation reviews

To access compensation reviews: From the left sidebar, select **Comp Reviews.**

When you access compensation reviews, a list displays all compensation reviews available to you (either as an Owner or as a participating Reviewer or Approver). From here, you can open an existing compensation review or create a new compensation review.

When you are a compensation review owner, and you open an existing compensation review, the following can occur, depending on the status of the selected compensation

review:

Status	Description
Not started	When the compensation review setup is currently in progress, the Cycle settings display.
Active	When the compensation review is active, the Cycle overview displays. The Cycle settings are unavailable. To display the Cycle settings, you must pause the cycle. **Learn more.**
Paused	When the compensation review is paused, the Cycle settings display. **Learn more.**
Approved	When the compensation review is approved, the Cycle overview displays. **Learn more.**
Closed	When the compensation review is closed, the Cycle overview displays. **Learn more.**

Modules: HRIS | Engagement | Goals | Performance | **Compensation Reviews** | Headcount Planning

5.6.1. Creating a new compensation review

When you create a new compensation review, you start out with a compensation review that is prepopulated with the following default settings:

- All employees are automatically eligible for review.
- All managers with direct reports are automatically set up as reviewers.
- Budget pools and guidelines are blank and ready for you to fill in.
- The reviewer's workbook is configured with a standard set of columns (based on your ChartHop organization's compensation settings).

> To protect sensitive employee data, only ChartHop users with the Owner, Org editor, or Compensation viewer role can create compensation reviews. Once created, a compensation review can be shared with any user, which will give them access to all compensation & sensitive data, as well as the ability to edit configuration of a compenation review.

Create a new compensation review

To create a new compensation review:

1. From the left sidebar, select **Comp Reviews.**
2. Select **Create comp review**.

Duplicate an existing compensation review

You can duplicate an existing compensation review to create a new compensation review with the same settings.

To duplicate a compensation review:

1. From the left sidebar, select **Comp Reviews.**
2. Select the checkbox for the compensation review you want to duplicate.
3. Select **Duplicate**.
    - A copy of the compensation review is added to the list.

Delete a compensation review

If you decide that the settings you've been configuring for your compensation review are no longer applicable and would rather start over, you can delete an existing compensation review.

To delete a compensation review:

1. From the left sidebar, select **Comp Reviews.**
2. Select the checkbox for the compensation review you want to delete.
3. Select **Delete**.
4. In the confirmation dialog, enter DELETE.
5. Select **Delete**.
    - The compensation review is removed from the list.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

> **Roles**: Owner | Org editor | Compensation viewer

5.6.2. Setting up a compensation review

Once you've created a new compensation review, you can customize the cycle settings of your compensation review to better fit the needs of your organization.

All your settings are automatically saved as you configure them. You can leave the compensation review setup at any time and return to continue editing where you left off.

> You can't edit the cycle settings for a compensation review once you've launched the cycle and it has a status of **Active**. To edit the cycle settings, the compensation review must be in a status of **Not started** or **Paused**.

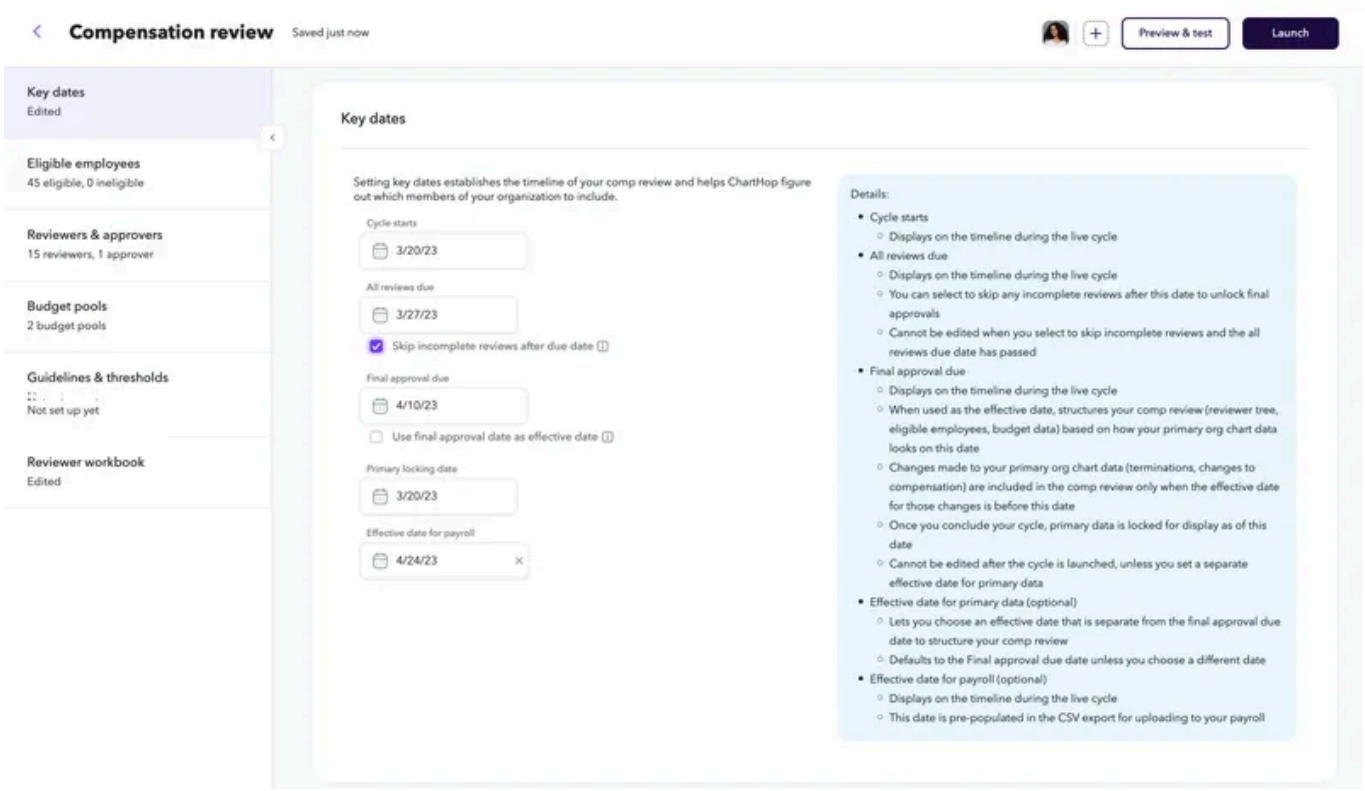
The following cycle settings topics are included in this section:

- Set up key dates
- Establish eligible employees
- Assign reviewers and approvers
- Set up budget pools
- Establish guidelines
- Customize the reviewer workbook
- Preview and test a compensation review
- Launch a compensation review

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.2.1. Set up key dates

Key dates control when your compensation review takes place, how it's populated and organized, when reviews and approvals are due, and when all changes made within the review cycle should go into effect within your primary ChartHop organization. Date and time formats are based on your organization's settings.



To set up key dates:

1. From the left sidebar, select **Comp Reviews.**
2. Open an existing compensation review with a status of **Not started** or **Paused**.
3. Select the **Key dates** tab.
4. Choose a date for each key date field. See below for descriptions.
5. Once entered, all dates are saved automatically.

Key Dates descriptions

This table describes Key Dates and how they work:

Key Date	Description
Cycle starts	This is the date when you want the compensation review cycle to start and when you plan on launching the review so that reviewers and approvers can access the compensation review cycle. Please note that a compensation review cycle is not active until you launch it manually. **Learn more.** By default, this date is set two weeks into the future. This date displays to reviewers and approvers in the timeline during the live cycle.
All reviews due	This is the deadline for reviewers and approvers to submit their reviews and approvals. You can select the **Skip incomplete reviews after due date** checkbox to automatically skip incomplete reviews on the All reviews due date to unlock final approvals. When incomplete reviews are set to be skipped, you can't edit the All reviews due date once it has passed. **Learn more.** This date displays to reviewers and approvers in the timeline during the live cycle.
Final approval due	This is the final approval deadline. This is also the default date that is used to structure your compensation review (unless you select a different effective date for primary data). **Learn more.** Once a cycle is concluded, ChartHop freezes all primary data in the compensation review as of this date to help maintain accurate read-only access. You can't edit this date after you have launched a cycle unless you set a different effective date for primary data. By default, this date is set six weeks into the future. This date displays to reviewers and approvers in the timeline during the live cycle.

Key Date	Description
Effective date for primary data (optional)	This is the effective date that is used to structure and organize your compensation review when the Final approval due date is not used. By default, ChartHop uses the Final approval due date as the effective date, but setting a separate effective date is recommended in cases where you want to better control the data that displays in the compensation review (for example, due to differences in payroll dates and cycle timelines). **Learn more.** You cannot edit this date after you launch the cycle.
Effective date for payroll (optional)	This is the date where all changes proposed and approved during the review cycle should go into effect. This date is pre-populated in the CSV export for the compensation review cycle. When this date is not defined, the value defaults to the Final approval due date. This date displays to reviewers and approvers in the timeline during the live cycle.

Effective date for primary data

By default, your compensation review includes employee data based on how your primary org data looks like on the Final approval due date.

However, you can change this date to an earlier date to adjust the employee data that is included in the compensation review (for example, when you want to lock primary data a week before the compensation review starts rather than using the Final approval due date that is set in the future).

To select a different effective date for your compensation review, unselect the **Use final approval date as effective date** option and select a different Effective date for primary data instead.

Changing the effective date could impact the number of employees included in the compensation review, as well as the information included about those employees. Certain employees or managers may or may not be included due to organizational changes made after the effective date you choose.

Any changes you make to your primary org chart data (for example, terminations, changes to compensation) are included in the compensation review only when the effective date for those changes is before the Final approval due date/Effective date for primary data date.

Automatically skip incomplete reviews

The **Skip incomplete reviews after due date** option automatically skips any reviews that haven't been completed as of the All reviews due date and marks them as **Skipped**. Reviews are skipped on the day after the All reviews due date.

Any remaining To-dos for lower-level reviewers and approvers are cleared, enabling final approvers to go in and perform their final review without having to wait for all incomplete reviews to be completed and submitted.

Skipped reviews become read-only and can no longer be edited. Reviewers and approvers receive a notification at the top of their compensation review letting them know that their reviews and approvals were skipped because the deadline has passed. Any previous changes entered by reviewers and approvers are maintained.

When the **Skip incomplete reviews after due date** option is enabled, you can't edit the All reviews due date once the All reviews due date has passed.

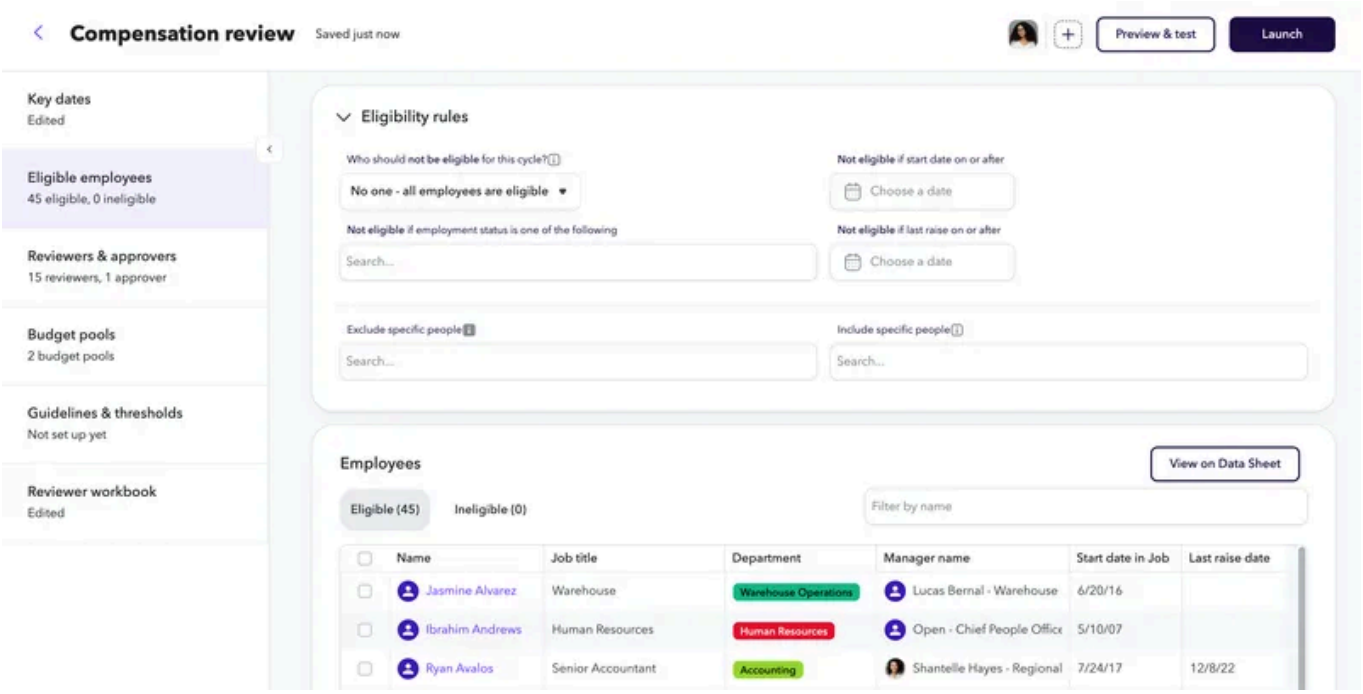
Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.6.2.2. Establish eligible employees

Eligible employees are all employees whose compensation is being evaluated within the compensation review cycle. By default, all employees are eligible for the compensation period cycle.

You can establish eligibility rules and exceptions to filter out employees who should not be included as eligible within the compensation review cycle.



Include all employees

You can establish eligibility for all employees so that no employees are excluded from the compensation review cycle.

To include all employees in the compensation review:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Eligible employees** tab.
3. In the **Eligibility rules** section, select **No one - all employees are eligible** in the **Who should not be eligible for this cycle?** dropdown list.
    - Your settings are saved automatically and all employees are included in the **Eligible** tab.

Exclude specific categories of employees

You can exclude employees based on their specific department, team, or location. You can also create custom categories of employees to exclude from the compensation review cycle.

To exclude employees based on these specific categories:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Eligible employees** tab.
3. In the **Eligibility rules** section, use the **Who should not be eligible for this cycle?** dropdown list to select a category of employees to exclude. You can choose from the following options:
    - **Specific departments** - Exclude specific departments from being included in the review. Enter only the departments you *do not* want to include.
    - **Specific teams** - Exclude specific teams from being included in the review. Enter only the teams you *do not* want to include.
    - **Specific locations** - Exclude employees located in the specified location. Enter only locations whose employees you *do not* want to include.
    - **Custom...** - Establish custom criteria for excluding employees. You can establish the criteria using filters or a Carrot query.
4. Your settings are saved automatically. Employees display either in the **Eligible** or **Ineligible** tabs based on your criteria.

Exclude a specific employment status

You can choose to exclude a specific employment status (for example, part-time employees) so that only employees who are not part-time are included in the compensation review cycle.

To exclude a specific employment status:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Eligible employees** tab.
3. In the **Eligibility rules** section, search for an employment status in the **Not eligible if employment status is one of the following** field.

4. Select the employment status you want to exclude. Employees with that employment status are no longer eligible for the compensation review.
    - Your settings are saved automatically. Employees display either in the **Eligible** or **Ineligible** tabs based on your criteria.

Exclude employees who started on or after a specific date

You can exclude recent hires from being eligible for the compensation review.

To exclude employees with a start date on or after a specific date:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Eligible employees** tab.
3. In the **Eligibility rules** section, choose a date in the **Not eligible if start date on or after** field. All employees with a start date on or after the chosen date are excluded from the compensation review.
    - Your settings are saved automatically. Employees display either in the **Eligible** or **Ineligible** tabs based on your criteria.

Exclude employees based on the date of their last raise

You can exclude employees who have recently received a raise from being included in the compensation review cycle.

To exclude employees based on the date of their last pay increase:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Eligible employees** tab.
3. In the **Eligibility rules** section, choose a date in the **Not eligible if last raise on or after** field.
    - All employees with a pay increase established on or after the chosen date are excluded from the compensation review.
    - Your settings are saved automatically. Employees display either in the **Eligible** or **Ineligible** tabs based on your criteria.

Exclude or include specific employees by name

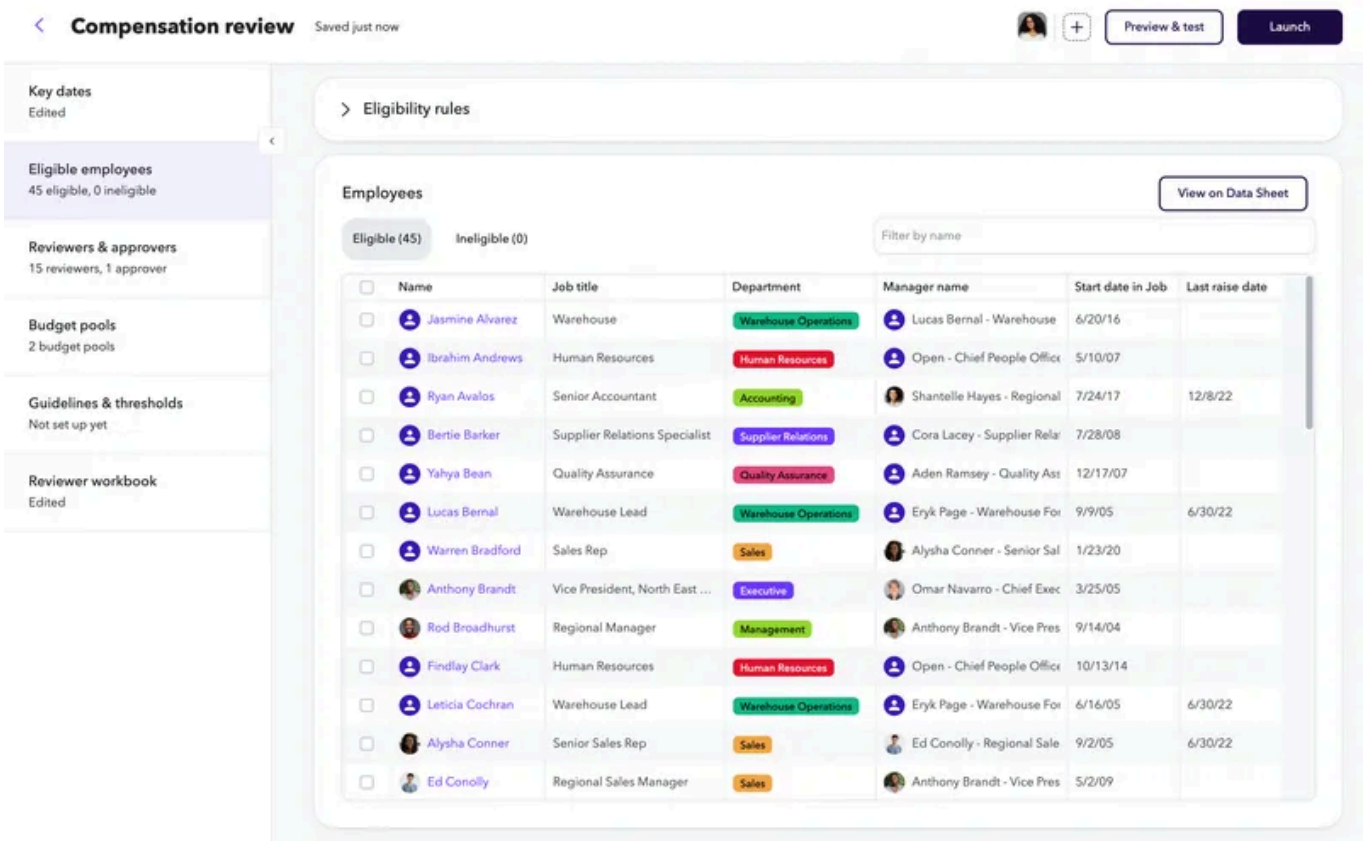
You can choose specific employees to exclude or include in your compensation reviews. For example, you can use this to exclude specific employees who require a separate compensation review process or to include an employee who was hired after the cutoff date.

To exclude or include specific employees:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Eligible employees** tab.
3. In the **Eligibility rules** section, search for the employee you want to exclude or include in the **Exclude specific people** or **Include specific people** fields.
4. Select the employee's name in the list.
    - Your settings are saved automatically. Employees display either in the **Eligible** or **Ineligible** tabs based on your criteria.

Review eligible employees

Once you have finished establishing eligibility rules, you can collapse the **Eligibility rules** section to view all eligible employees within the **Eligible** and **Ineligible** tabs.



When you select an employee in the list, the profile summary for that employee displays on the right.

You can also use the checkboxes to select employees in the list and quickly exclude or include them (based on the selected tab).

Export eligible or ineligible employees

When you select the **View on Data Sheet** button, ChartHop creates a **Data Sheet** view that is populated with all Eligible or Ineligible employees (depending on the tab you have currently selected). You can then export that list as a .csv file to share with others outside the compensation review cycle configuration.

To export a .csv file of eligible or ineligible employees:

1. In the **Employees** section, select the tab for the employees you want to export (either **Eligible** or **Ineligible**).
2. Select **View on Data Sheet**. ChartHop populates a **Data Sheet** view with the corresponding employees.
3. In the **Data Sheet**, select the **Edit ▼** dropdown menu.
4. Select **Export CSV**.
5. Configure the export options and select **Export**.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

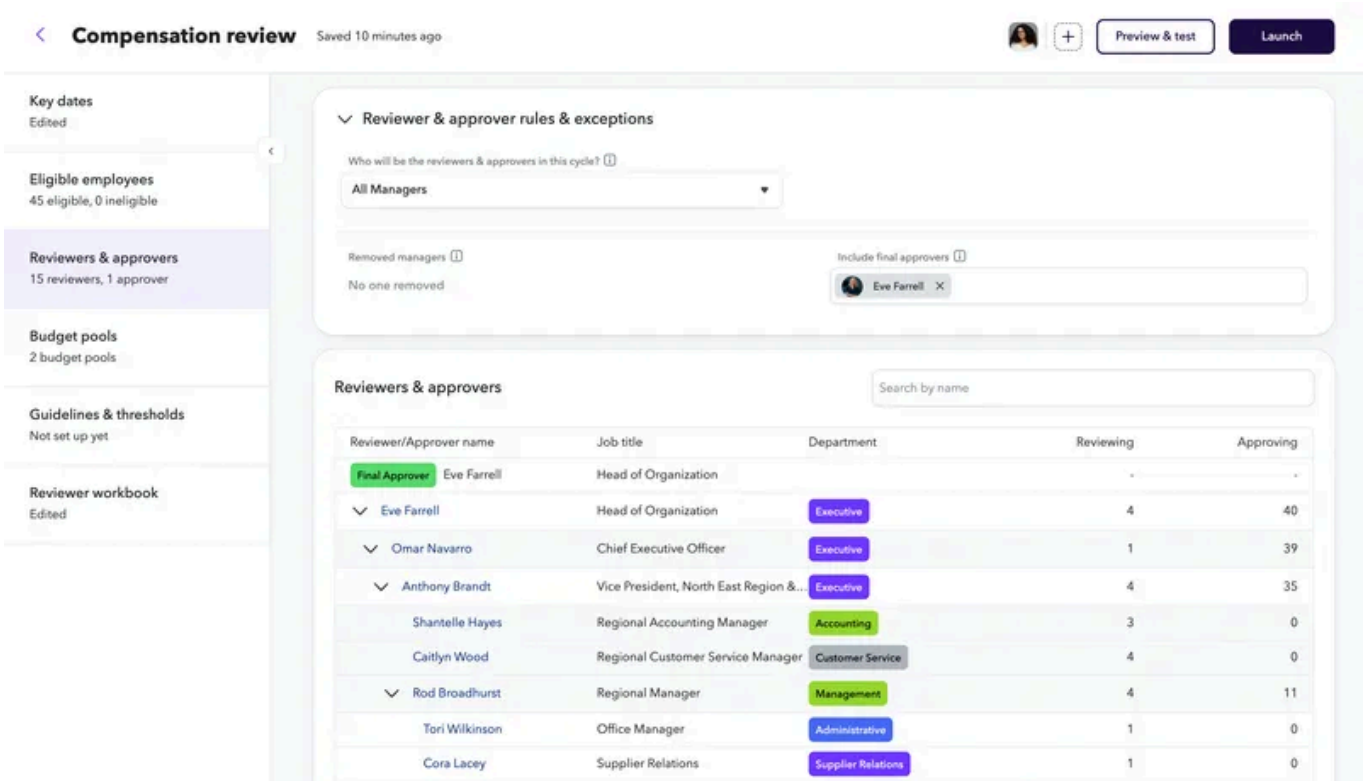
5.6.2.3. Assign reviewers and approvers

Reviewers are responsible for reviewing employee compensation, proposing compensation changes, and submitting those changes up the approval structure. Reviewers have a pod, or group, of people whose compensation they're responsible for reviewing. This pod can include direct reports as well as multiple levels of employees for review.

Approvers are responsible for approving the compensation changes that were submitted to them and submitting those approvals further up the approval structure (either to another approver or to a final approver, depending on the structure).

A person can be both a reviewer and an approver.

A *Final approver* completes the final review of all compensation changes made in a compensation review cycle. You can assign multiple final approvers.



To assign reviewers and approvers, open an existing compensation review with a status of **Not started** or **Paused**. Select the **Reviewers & approvers** tab.

> Initially, only managers with direct reports can be added as reviewers and approvers in a compensation review. However, you can later reassign reviews to a person without direct reports (for example, an HRBP or other employee). **Learn more.**

Assign all managers as reviewers and approvers

You can add all managers to the **Reviewers & approvers** list at once. A person is considered a reviewer when they have at least one person whose compensation they're responsible for reviewing.

To include all managers as reviewers and approvers:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Reviewers & approvers** tab.
3. In the **Reviewer & approver rules & exceptions** section, select **All managers** from the **Who will be the reviewers & approvers in this cycle?** dropdown list.
    - Your settings are saved automatically. All managers are added to the **Reviewers & approvers** list.

Assign only managers at specific levels as reviewers and approvers

You can also decide to only add managers at specific job levels as reviewers and approvers.

To include only managers at specific levels:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Reviewers & approvers** tab.
3. In the **Reviewer & approver rules & exceptions** section, select **Only specific levels** from the **Who will be the reviewers & approvers in this cycle?** dropdown list.
4. Enter the job levels to be included in the **Only these job levels** field.
    - Your settings are saved automatically. All managers who meet the criteria are added to the **Reviewers & approvers** list.

Assign a custom category of managers as reviewers and approvers

If you need more specificity or flexibility with assigning managers as reviewers and approvers, you can create custom criteria for including managers.

To customize the criteria for managers that are included:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Reviewers & approvers** tab.
3. In the **Reviewer & approver rules & exceptions** section, select **Custom...** from the **Who will be the reviewers & approvers in this cycle?** dropdown list.
4. Use the filters or use a Carrot query to establish your custom criteria.
    - Once you are finished, your settings are saved automatically. All managers who meet the criteria are added to the **Reviewers & approvers** list.

Reassign a reviewer in the compensation review

You can reassign a reviewer when you want that specific individual to review compensation for another pod or group of employees.

You can also reassign a reviewer to exclude another manager from participating in the review. For example, you can exclude an individual manager because they are new to the organization or because they will be on leave during the compensation review cycle by reassigning their reviews to someone else.

When you reassign a reviewer, you remove the original manager and reassign their employee reviews to another manager who will be participating in the compensation review.

To reassign a reviewer:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Reviewers & approvers** tab.
3. In the **Reviewers & approvers** list, select the name of the manager you want to remove. A panel displays the manager and all their direct reports.
4. Select **Remove [Manager] & reassign all**. The **Reassign to another reviewer** dialog displays.
5. Enter the name of the manager to whom you want to reassign the employee reviews.
6. Click **Reassign**.

- All employee reviews are reassigned to the new manager and the excluded manager displays in the **Reviewer & approver rules & exceptions** section under **Removed managers**.
- You can select **Reset** under the **Removed managers** list to undo all manager exclusions and restore the original assignments.

Assign final approvers

The final approver is responsible for reviewing all changes at the end of a compensation review. You can assign more than one final approver.

To assign a final approver:

1. Open an existing compensation review with a status of **Not started** or **Paused**.
2. Select the **Reviewers & approvers** tab.
3. In the **Reviewer & approver rules & exceptions** section, enter the name of the person you want to assign as a final approver in the **Include final approvers** field.
4. Select the name of the final approver.
    - Once assigned, your final approvers display both in the **Include final approvers** field and are tagged as final approvers within the **Reviewers & approvers** list.
    - Your settings are saved automatically.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

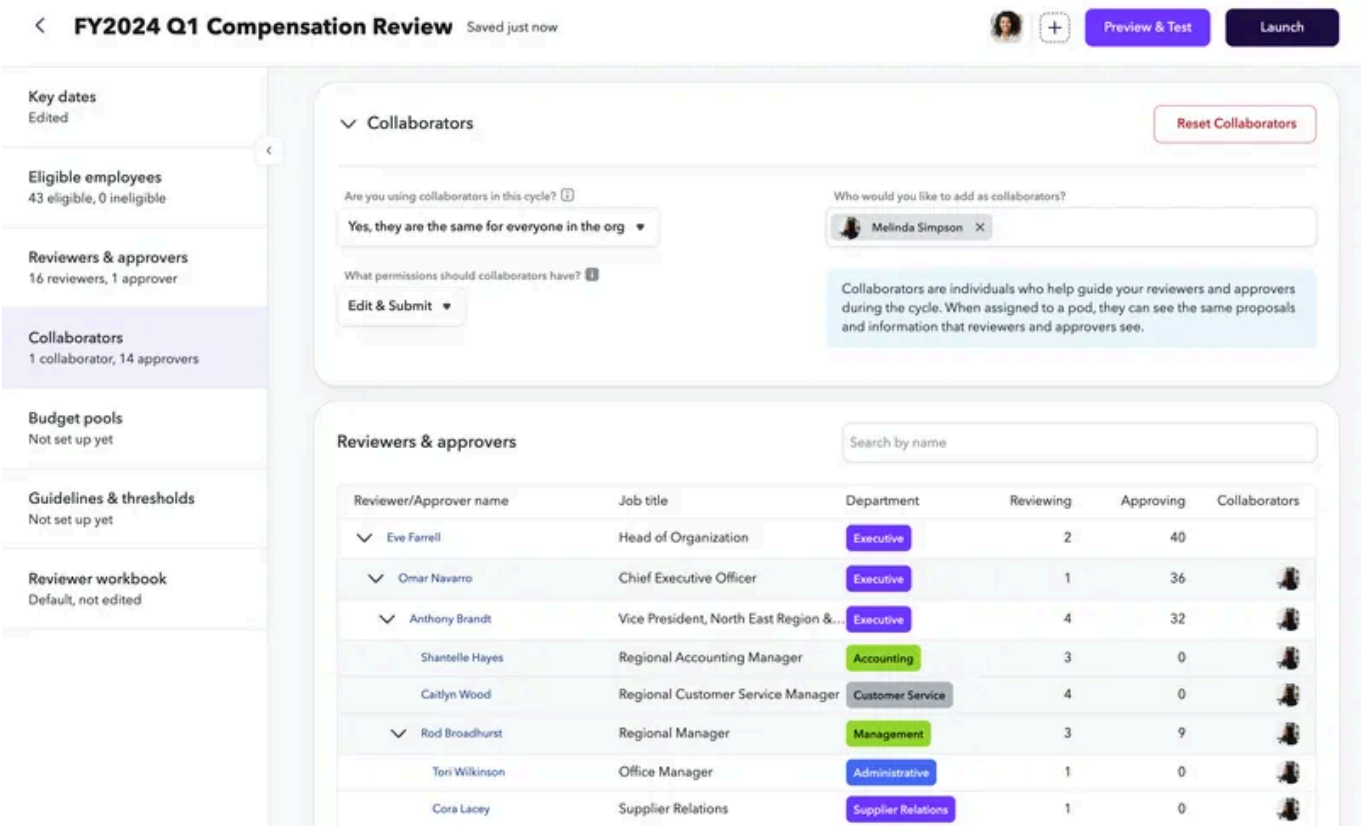
5.6.2.4. Assign collaborators

Collaborators are people who work alongside your reviewers and approvers to guide them throughout the compensation review cycle. These individuals (for example, a senior HR advisor or HRBP) help ensure that your reviewers and approvers are on the same page when it comes to your organization's compensation goals.

When you assign a collaborator to work with a reviewer or approver, the collaborator sees the same information that the reviewers and approvers see in the compensation review. You have the flexibility to give your collaborators as much control over a compensation review proposal as you want:

- For example, you can set it up so that collaborators have view-only access and only the reviewer or approver can submit their compensation review proposal.
- Or, if you prefer your collaborators to be more hands-on, you can give collaborators the ability to edit and even submit on behalf of a reviewer.

All collaborators have the same level of permissions that you assign.



To assign collaborators, open an existing compensation review with a status of **Not started** or **Paused**. Select the **Collaborators** tab.

> When you are not working with collaborators in the compensation review, select **No, we are not using collaborators** in the **Are you using collaborators in this cycle?** dropdown. This option is selected by default. Please note that when you change your selection for the **Are you using collaborators in this cycle?** field, any previous configuration you've made is deleted and the Collaborators tab is reset. Once you launch your compensation review cycle, you can't make any more changes to this field.

Assign the same collaborators for all reviewers and approvers

When the same collaborators are going to be working with all reviewers and approvers in your compensation review cycle, you can assign them all at once. Collaborators are assigned based on the eligible employees included in the compensation review.

To assign the same collaborators to all reviewers and approvers:

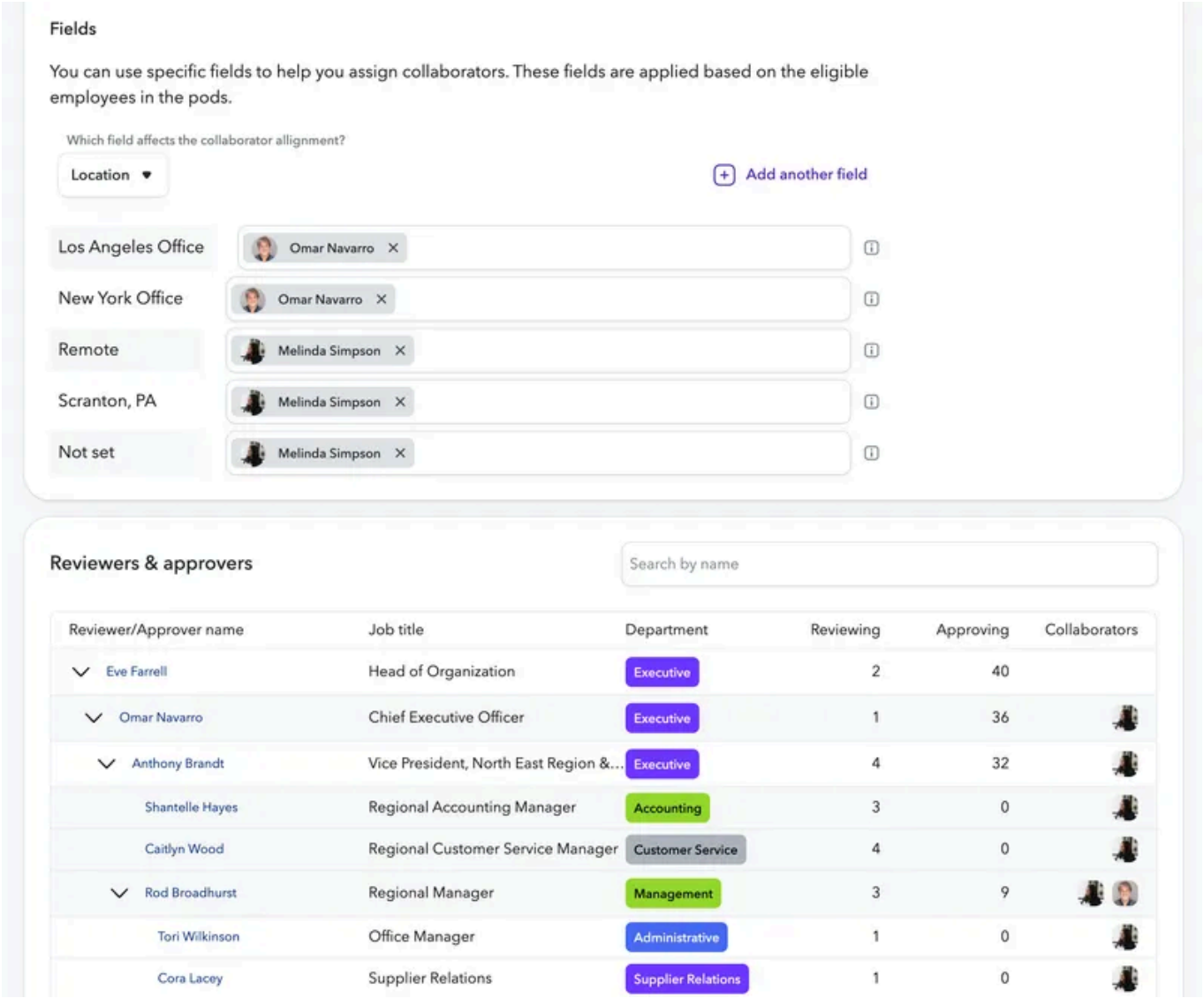
1. Navigate to the **Collaborators** section in the **Collaborators** tab.
2. In the **Are you using collaborators in this cycle?** field, select **Yes, they are the same for everyone in the org**.
3. Assign permissions for your collaborators in the **What permissions should collaborators have?** field. These permissions are applied to all collaborators. You can select from the following permission options:
    - **View only** - Indicates collaborators can only view compensation review proposals for the reviewers and approvers they're working with.
    - **Edit only** - Indicates collaborators can view and make changes to the compensation review proposals for the reviewers and approvers they're working with.
    - **Edit & Submit** - Indicates collaborators can view, make changes, and submit compensation review proposals on behalf of the reviewers and approvers they're working with.
4. Enter the names of your collaborators in the **Who would you like to add as collaborators** field.

- Remember that these individuals will have access to the same proposals and information that displays to the reviewers and approvers they're assigned to work with.
- The individuals you add as collaborators display in the Collaborators column for each reviewer and approver in the **Reviewers & approvers** section.
- Your changes are saved automatically.

Assign different collaborators for different parts of the organization

You can use ChartHop fields, for example, Department or Location, to get even more specific about how and where you assign collaborators to different groups of reviewers and approvers.

When you choose a field to assign collaborators, all of the available field values display in the **Fields** section and collaborators are assigned based on eligible employees. For example, if you assign Melinda Simpson as the collaborator for the Los Angeles office, then every reviewer and approver who has at least one eligible employee in the Los Angeles office will be assigned Melinda as a collaborator.



To assign collaborators to reviewers and approvers based on a ChartHop field:

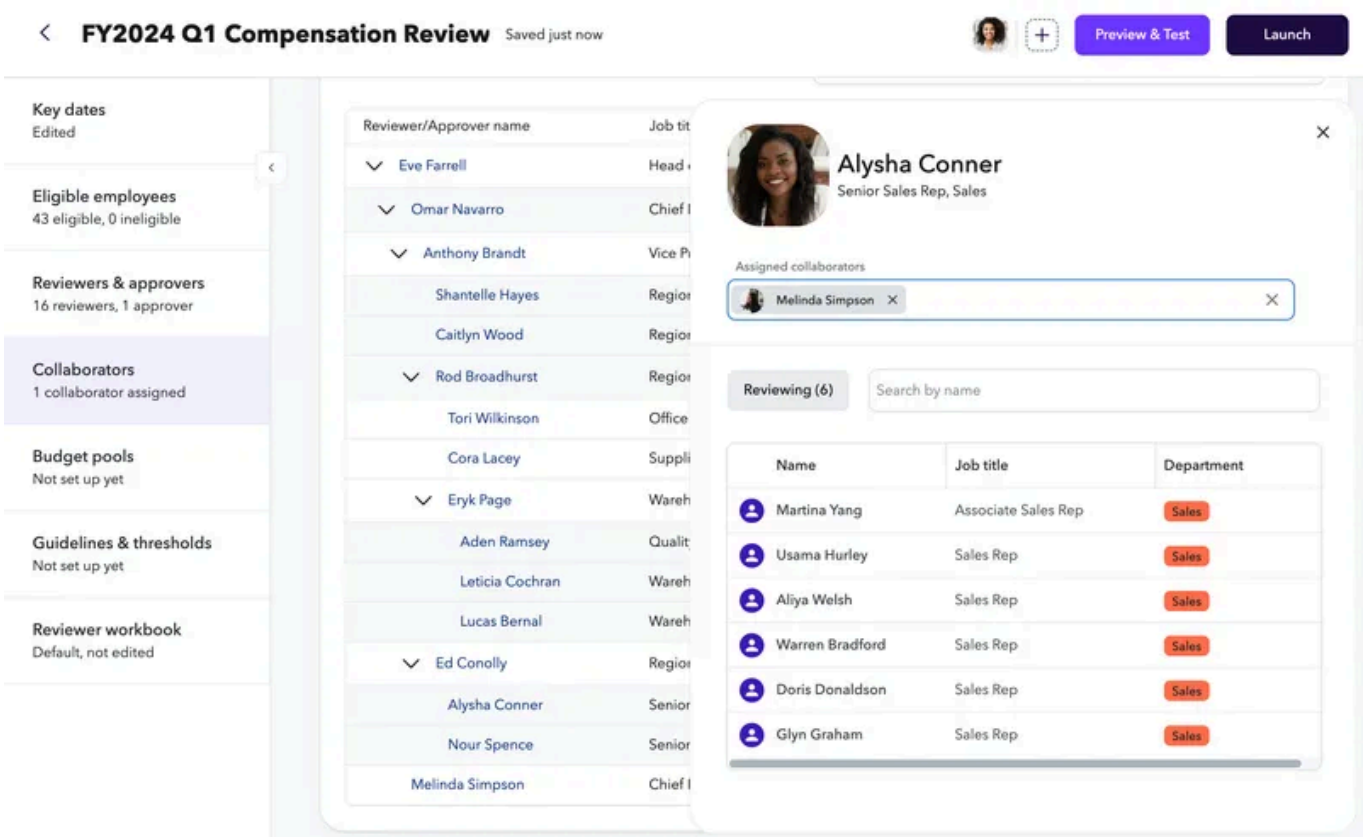
1. Navigate to the **Collaborators** section in the **Collaborators** tab.
2. In the **Are you using collaborators in this cycle?** field, select **Yes, they are different people for different parts of the org**.
3. Assign permissions for your collaborators in the **What permissions should collaborators have?** field. These permissions are applied to all collaborators. You can select from the following permission options:
    - **View only** - Indicates collaborators can only view compensation review proposals for the reviewers and approvers they're working with.
    - **Edit only** - Indicates collaborators can view and make changes to the compensation review proposals for the reviewers and approvers they're working with.

- **Edit & Submit** - Indicates collaborators can view, make changes, and submit compensation review proposals on behalf of the reviewers and approvers they're working with.

4. In the **Fields** section, select a ChartHop field to use for collaborator assignments from the dropdown (for example, Department).
    - Select **Add Another Field** to add another dimension to the way collaborators are assigned (for example, add Location if you want a specific person to collaborate with reviewers and approvers in the Accounting department in New York).
5. Enter the names of your collaborators in each of the ChartHop field values that display.
    - For example, if you selected to assign based on Department, enter a collaborator for each department that is listed.
    - Remember that these individuals will have access to the same proposals and information that displays to the reviewers and approvers they're assigned to work with.
    - The individuals you add as collaborators display in the Collaborators column for each reviewer and approver in the **Reviewers & approvers** section.
    - Your changes are saved automatically.

Assign collaborators for an individual reviewer or approver

You also have the option to manually assign a specific collaborator to a reviewer or approver on an individual basis.



To assign a collaborator for an individual reviewer or approver:

1. Navigate to the **Reviewers & approvers** table in the **Collaborators** tab.
2. Select the name of the reviewer or approver to whom you want to assign a collaborator.
3. In the **Assigned collaborators** field, enter the name of the individuals you want to assign for the selected reviewer/approver.
    - Your changes are saved automatically.

Unassign a collaborator from an individual reviewer or approver

You can also manually unassign a collaborator from an individual reviewer or approver. This is helpful when you've already assigned all collaborators to your organization but want to make a few individual changes.

To unassign a collaborator for an individual reviewer or approver:

1. Navigate to the **Reviewers & approvers** table in the **Collaborators** tab.
2. Select the name of the reviewer or approver whose collaborator you want to remove.
3. In the **Assigned collaborators** field, select **X** next to the collaborator you want to unassign.

- Your changes are saved automatically.

Reset collaborators

You have the option to reset your collaborators during configuration in case you need to start over.

To clear all collaborator assignments:

1. In the **Collaborators** tab, select **Reset Collaborators**.
2. Select **Confirm**. All your collaborator assignments are cleared.

5.6.2.5. Set up budget pools

Budget pools are budgets that you can create to establish the amount that can be spent within the compensation review.

You can set up an overall budget for all spending or set up several budget pool allocations for specific uses. For example, you can configure the following for your compensation review:

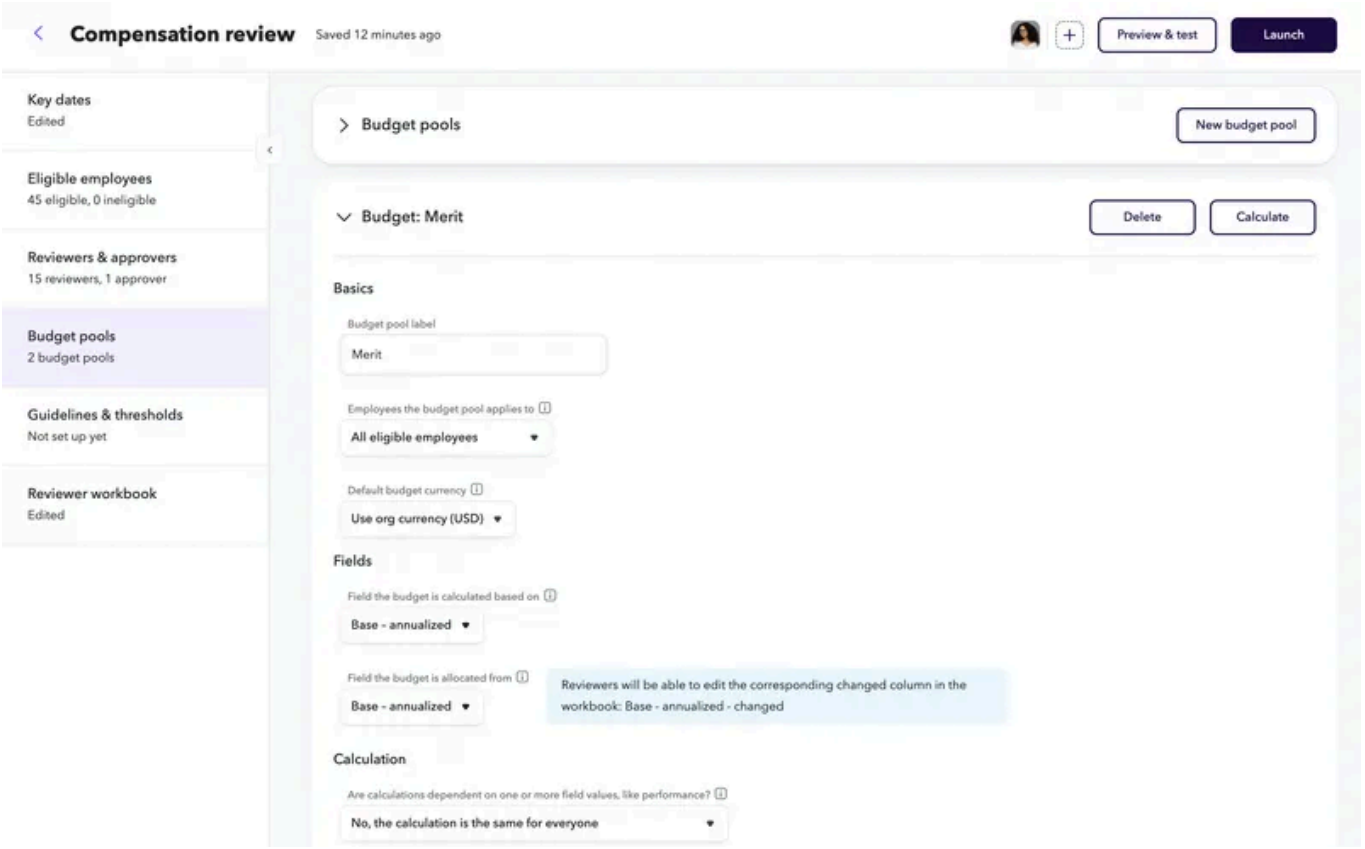
- a cost of living budget pool that applies to all eligible employees, and
- a separate merit budget pool that reviewers can use for performance-based compensation adjustments.

ChartHop also allows you to configure budget pools so that they're applicable to specific categories of employees (for example, based on department, team, level, location) or even based on the definition of built-in and custom fields. These allow you to create individual budget allocations for each reviewer.

If your company uses fixed budgets, or a certain amount of money assigned to specific reviewers within departments, that is also supported in our budget pools.

Your reviewers and approvers see the budget pools you establish when they perform the employee compensation reviews and work within those budgets.

> Setting up budgets also allows ChartHop to provide your reviewers and approvers with real-time visualizations of the financial impact of compensation changes against those budgets. **Learn more.**
>
> If you choose not to set up budgets, ChartHop still displays a visualization of how much is spent within the compensation review but does not compare that against a specific budget.



To establish budget pools, open an existing compensation review with a status of **Not started** or **Paused**. Select the **Budget pools** tab.

Set the budget allocation type

Before you create any budget pools, you should define how your budgets will be allocated. You can choose to have your budgets allocated proportionally or sequentially:

- When your budgets are allocated proportionally, ChartHop allocates proportionate amounts from each applicable budget pool (when multiple budget pools apply). For example, allocating proportionally from both a Market and Merit budget pool.
- When your budgets are allocated sequentially, ChartHop tries to fully allocate from the first applicable budget pool before allocating from the next one. The order in which amounts are allocated depends on the order in which you create your budget pools. For example, allocating first from a Market budget pool and then from a Merit budget pool for the remainder.

> For sequential allocation to occur, the same fields and calculations must be used across different budget pools.

To set the budget allocation type:

1. In the **Budget pools** section, navigate to the **Settings** section. These settings apply globally to all budget pools you create.
2. In the **Allocation Type** field, select how you want your budget allocation to be made. Choose from the following:
    - **Proportional**
    - **Sequential**
3. Your settings are saved automatically.

Create a budget pool

You can set up multiple budget pools to allocate and track specific budgets within your organization (for example, merit increases and market adjustments).

To create a new budget pool:

1. Select **New budget pool**.
2. Configure the budget pool settings according to the parameters you want to implement. See below for a description of all fields.
3. Once you are finished, select **Calculate** to process the calculations and display the calculated budgets for each reviewer based on the settings you entered. You can scroll horizontally to see the full view of the calculated budget.

Establish an overall budget

An overall budget tracks overall spend. Depending on your organization's compensation policies and planning, you can set up an overall budget to track the total spend in the compensation review.

To establish an overall budget:

1. Select **New budget pool**.
2. Configure the overall budget settings according to the parameters you want to implement. See below for a description of all fields.
3. Once you are finished, select **Calculate** to process the calculations and display the calculated budgets for each reviewer based on the settings you entered. You can scroll horizontally to see the full view of the calculated budget.

Delete a budget pool

You can delete a budget pool when you'd rather start over with a new configuration. Deleting a budget pool doesn't affect any other budgets you've created.

To delete a budget pool:

1. Select the **Budget pools** tab.
2. Expand the budget pool you want to delete.
3. Select **Delete**.
4. Select **Confirm** to delete the budget pool.

Budget settings

The following table describes the configuration fields you can apply to your budgets:

Field	Description	Example
Basics		
Budget label	The name of your budget.	Merit - US
Employees the budget pool applies to	Establishes the group or category of employees to which the budget pool applies. Reviewers and approvers can edit compensation based on availability within this budget pool. Select from the following dropdown options: • All eligible employees • Only specific departments • Only specific teams • Only specific levels • Only specific locations • Custom...	Only specific locations • United States Only specific departments • Engineering • Sales
Default budget currency	Determines the default currency used in your budget pool. This currency is used as a backup when the job currency cannot be detected and is also used when reconciling calculations involving multiple currencies. Defaults to the org default currency. **Learn more.**	USD ($)
Fields		
Field the budget is calculated based upon	Determines the ChartHop field (either built-in or custom) upon which the calculations are based.	Base Base - annualiz

Field	Description	Example
	For example, if you choose Base, then ChartHop uses the current values of that field to perform the calculations you enter in the **Calculation** section.	ed
Field budget is allocated from	Determines the ChartHop field (either built-in or custom) from which the budget spend is tracked. For example, if you choose Base - changed, when reviewers and approvers change the contents of the the Base - changed column in the reviewer workbook, ChartHop uses the difference between the new entered amount and the previous amount (in other words, Base versus Base - changed) to figure out how much is being spent. That amount is tracked and shown within the budget allocation visualizations.	Base - changed Base - raise amount
Calculation		
Are calculations dependent on one or more field values, like department?	Determines whether the amount is calculated based on how a specific built-in or custom field is defined (for example, department, performance). Select **Yes** to establish additional considerations for the budget calculations based on specific fields. Selecting **Yes** displays the **Which field affects the calculation?** field underneath. Select **No, the calculation is the same for everyone** to apply the calculations evenly across all eligible employees for the budget pool. Select **No, the calculation is based on reviewer pods** to apply fixed budget amounts for reviewers in the budget pool.	Yes
Which field affects the calculation?	Determines the built-in or custom field that affects the calculation. When you select a field, you can define how the values of this field specifically affect the budget calculations. Only fields with the following data types can be selected:	Performance rating Division

Field	Description	Example
	• Number • Money • Percent • Single select	Business Operations 2% Customer Support 2% Sales 4% Finance 2% Legal 2% Marketing 3% Product 3% R&D 4%
Calculation	Determines the specific calculation that is processed to affect the budget. Select from the following dropdown options: • Percent • Set amount (money) • Custom formula - Percent • Custom formula - Set amount (money)	Percent
Target value	Establish a target value for the calculation.	1.5% $3000

Configure budget bar visualizations

You have the ability to hide budgets that don't apply to reviewers so that reviewers only see the budgets that apply to them. The **Budget bar visualizations** dropdown in the Budget pools settings lets you configure how budgets display to reviewers.

> Whether or not a budget displays to a reviewer is based on whether there are eligible employees to whom the budget applies in that reviewer's pod.

To set up budget bar visualizations:

1. In the **Budget pools** section, navigate to the **Settings** section. These settings apply globally to all budget pools you create.
2. In the **Budget bar visualizations** dropdown, select how you want budgets to display:
    - **Show all** - Indicates all budgets display. When a budget is not applicable for the reviewer's eligible employees, it displays as an empty bar without any values.
    - **Only show applicable** - Indicates only applicable budgets display for the reviewer. The reviewer can see budget headers and values for the budgets that apply to the reviewer's eligible employees. This is the default option.
3. Your settings are saved automatically.

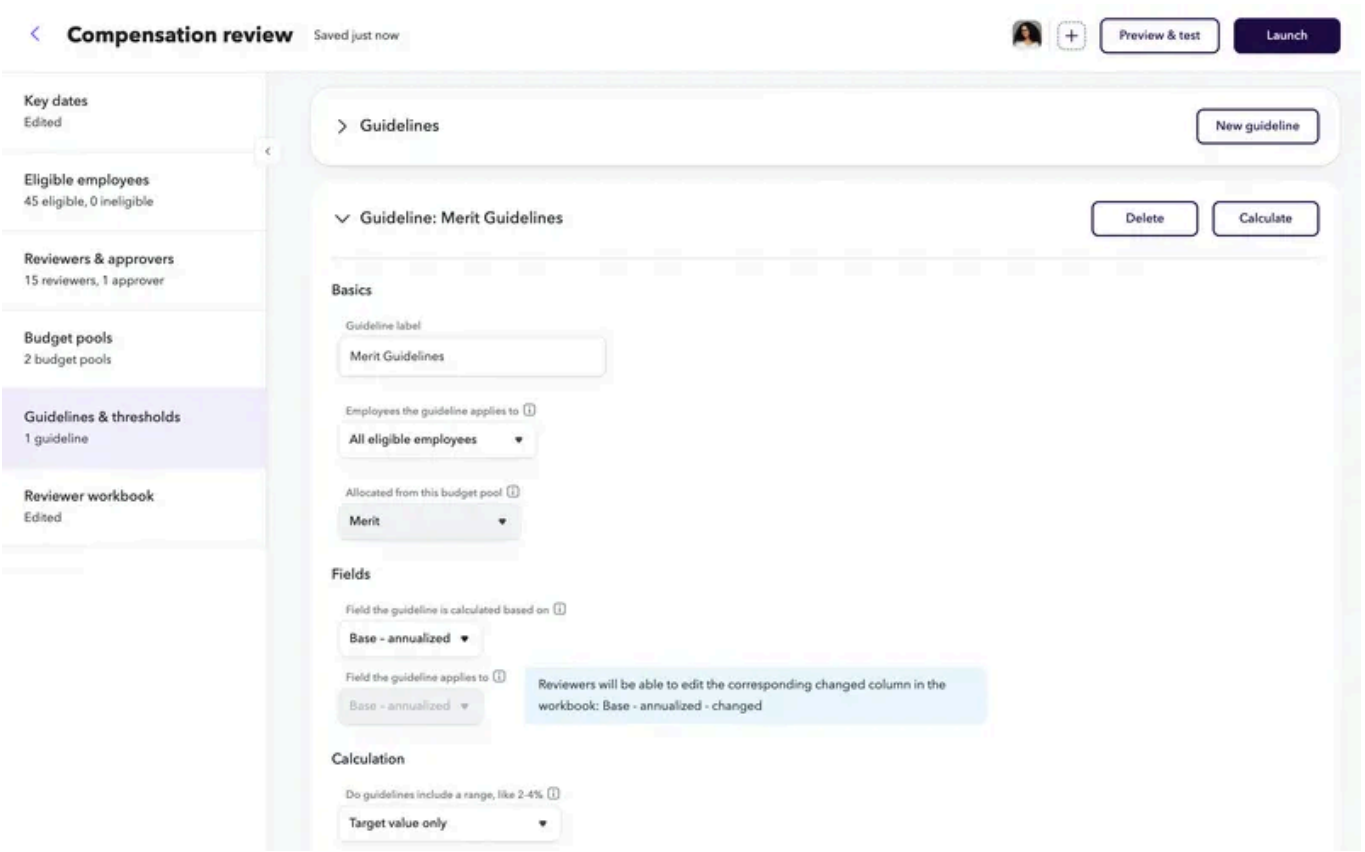
> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.2.6. Establish guidelines

You can establish *guidelines* to provide reviewers and approvers with a set of target ranges or amounts for each budget pool so that they have a starting point and reference range to work with when reviewing compensation.

Guidelines empower your reviewers and approvers with the confidence that they are reviewing compensation equitably and according to established considerations.

You can choose to prepopulate field columns with recommended increases based on the values of specific built-in or custom fields (for example, performance review rating, location, or amount of time employed) or choose to provide your reviewers and approvers with guidelines that include target values and ranges.



To establish guidelines, open an existing compensation review with a status of **Not started** or **Paused**. Select the **Guidelines & thresholds** tab.

Create a guideline

You can create and customize multiple guidelines so that you can provide as much guidance and reference points for your reviewers and approvers as you want.

To create a new guideline:

1. Select **New guideline**.
2. Configure the guideline settings according to the parameters you want to implement. See below for a description of all fields.
3. Once you are finished, select **Calculate** to process and update the guideline calculations.

Delete a guideline

You can delete a guideline when you'd rather start over with a new configuration. Deleting a guideline doesn't affect any other guidelines you've created.

To delete a guideline:

1. Expand the guideline you want to delete.
2. Select **Delete**.
3. Select **Confirm** to delete the guideline.

Guideline settings

The following table describes the configuration fields you can apply to your guidelines:

Field	Description	Example
Basics		
Guideline label	The name of your guideline. Reviewers and approvers see this label during employee compensation reviews.	Merit - US
Employees the guideline applies to	Establishes the group or category of employees for which the guideline applies. Select from the following dropdown options: • All eligible employees • Only specific departments • Only specific teams • Only specific levels • Only specific locations • Custom...	Only specific locations • United States
Allocated from this budget pool	Determines the budget pool to which the guidelines apply to.	Budget pool: Merit - US
Fields		
Field the guideline is calculated based on	Determines the ChartHop field (either built-in or custom) upon which the guideline calculations are based. For example, if you choose Base, then ChartHop uses the current values of that field to perform the calculations you enter in the **Calculation** section.	Base
Field the guideline applies to	Determines the ChartHop field (either built-in or custom) that is used to leverage and display the recommended guideline amount.	Base - changed

Field	Description	Example
	For example, if you choose Base - changed, then ChartHop applies the calculated guideline amount to the values in the Base - changed field.	
Calculation		
Do guidelines include a range, like 2-4%	Determines how your guidelines recommend compensation changes. Select from the following options: • Target value only - Indicates only a target value is recommended. • Target value + range - Indicates a target value and a range are both recommended.	Target value + range
Are calculations dependent on one or more field values, like performance?	Determines whether the amount is calculated based on how a specific built-in or custom field is defined (for example, department, performance). Select **Yes** to establish additional considerations for the guideline calculations based on specific fields. Selecting **Yes** displays the **Which field affects the calculation?** field underneath. Select **No, the calculation is the same for everyone** to apply the calculations evenly across all eligible employees for the guideline.	Yes
Which field affects the calculation?	Determines the built-in or custom field that affects the calculation. When you select a field, you can define how the values of this field specifically affect the guideline calculations. Only fields with the following data types can be selected: • Number	Performance rating Division Business Operations 2%

Field	Description	Example
	• Money • Percent • Single select	Customer Support 2% Sales 4% Finance 2% Legal 2% Marketing 3% Product 3% R&D 4%
Calculation	Determines the specific calculation that is processed to affect the guideline. Select from the following dropdown options: • Percent • Set amount (money) • Custom formula - Percent • Custom formula - Set amount (money)	Percent
Minimum	Determines the minimum of the guideline range when the guideline is set to have a target value and range. This can be a percentage or a set amount depending on the Calculation used.	2% $1500
Target	Determines the target of the guideline range when the guideline is set to have a target value and range. This can be a percentage or a set amount depending on the Calculation used.	4% $3000

Field	Description	Example
Maximum	Determines the maximum of the guideline range when the guideline is set to have a target value and range. This option displays only when the Calculation is using a percentage.	6%
Thresholds & workbook display options		
Flag if value deviates from guidelines	Determines whether ChartHop flags a compensation change if it deviates from the established guideline.	Yes
Prepopulate editable columns with target value	Determines whether compensation reviews are prepopulated with recommended amounts for reviewers and approvers. Based on the established guideline target value.	Yes

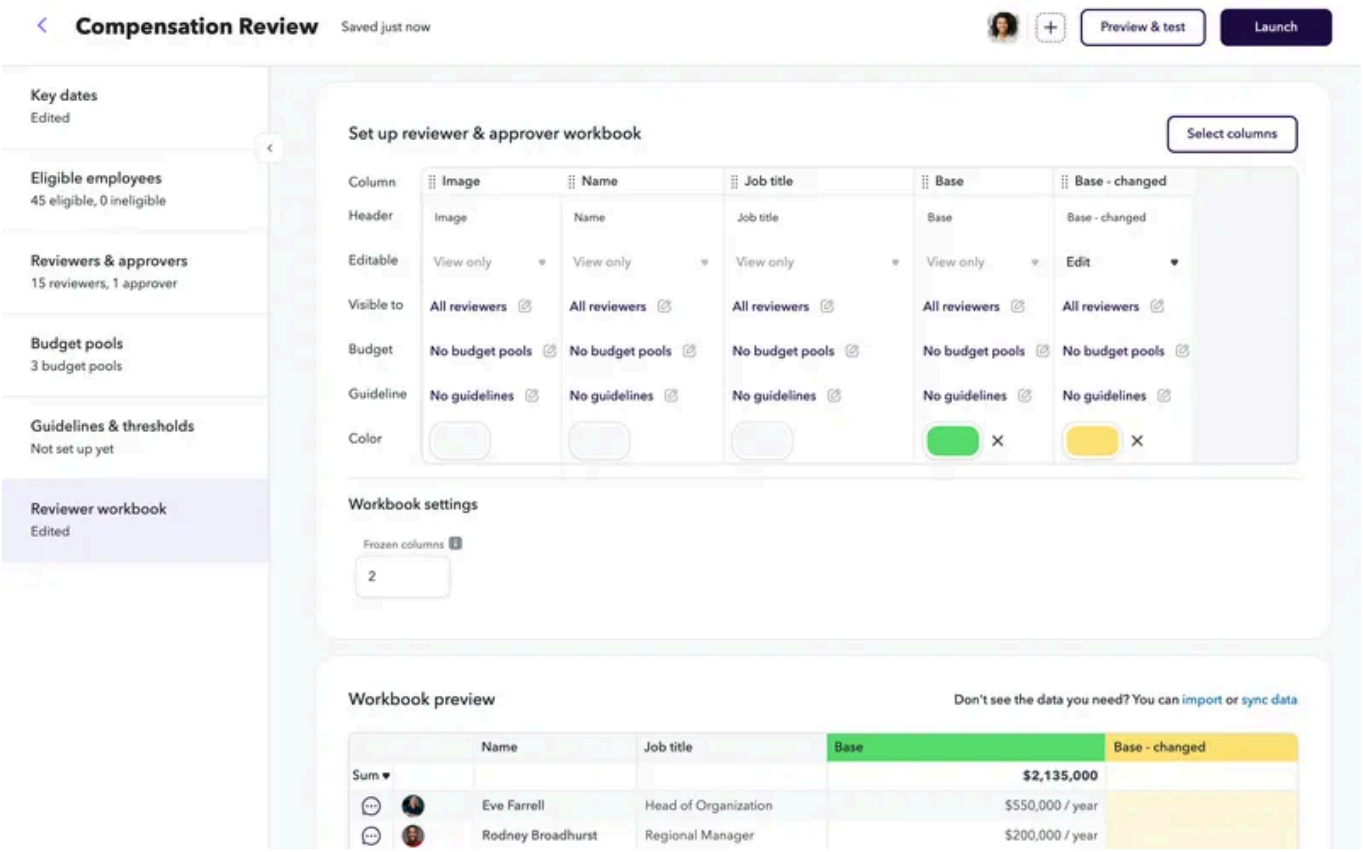
Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.6.2.7. Customize the reviewer workbook

The *reviewer workbook* is the relevant employee, budget, and guideline data that displays to your reviewers and approvers when they complete employee compensation reviews.

Each column in the reviewer workbook corresponds to a ChartHop built-in or custom field. The columns that are included by default in the reviewer workbook are based on the built-in fields you use throughout your ChartHop organization. However, you have the flexibility to customize the reviewer workbook so that it is tailored for the needs of your reviewers and approvers.



Reviewer workbook setup

To customize the reviewer workbook, open an existing compensation review with a status of **Not started** or **Paused**. Select the **Reviewer workbook** tab.

Customize an existing column

To customize the existing columns that display in the reviewer workbook:

1. In the **Set up reviewer & approver workbook** section at the top, select the column you want to customize.
2. Edit the column. You can edit the following settings:
    - **Header** - Determines the name of the column that displays to reviewers and approvers. For example, Current salary (as opposed to Base, which is the standard field name in ChartHop).
    - **Editable** - Determines whether reviewers and approvers can edit the contents of the column during the compensation review process. You can select from the following options:
        - Edit - Indicates the reviewer or approver can edit the contents of the column. For example, to a proposed raise amount.
        - View only - Indicates the reviewer or approver can't make edits. For example, to an employee name or performance rating.
        - Edit only if - Indicates the reviewer or approver can edit the contents of the column only if they meet specific criteria. You can establish the criteria using filters or use a Carrot query.
    - **Visible to** - Determines the visibility of the column and who it displays for. You can select from the following options:
        - Everyone - Indicates everyone involved in the compensation review (for example, owners, reviewers, and approvers) can view this column and its contents. This is the default setting.
        - Only specific departments - Indicates only reviewers and approvers from the selected department can view this column and its contents.
        - Only specific teams - Indicates only reviewers and approvers from the selected team can view this column and its contents.
        - Only specific locations - Indicates only reviewers and approvers from the selected location can view this column and its contents.
        - Custom - Indicates only reviewers and approvers that meet the specified custom criteria can view this column and its contents. You can establish the criteria using filters or Carrot.
        - You can also specify visibility based on role in the compensation review cycle. **Learn more.**
    - **Budget** - Displays how many budgets you've set up that reference this field.

- **Guideline** - Displays how many guidelines you've set up that reference this field.
- **Color** - Customizes the color of the column header in the reviewer workbook for reviewers and approvers. You can select a specific color by entering a Hex code or RGB value.

3. Change column order by selecting **Select columns**. In the **Column order** section on the right, you can rearrange the columns so that they display in the order you want on the reviewer workbook.
    - Your settings are automatically saved.

Add a new column to the reviewer workbook

To add a new column based on an existing field you use in ChartHop:

1. In the **Set up reviewer & approver workbook** section at the top, select **Select columns**.
2. Choose the columns you want to add to the reviewer workbook by checking the checkbox next to each available column name.
3. (Optional) In the **Column order** section on the right, you can rearrange the columns so that they display in the order you want on the reviewer workbook.
4. Select **Apply**.
    - The columns are added to the **Set up reviewer & approver workbook** section at the top of the **Reviewer workbook** tab and can be further customized.

Delete a column from the reviewer workbook

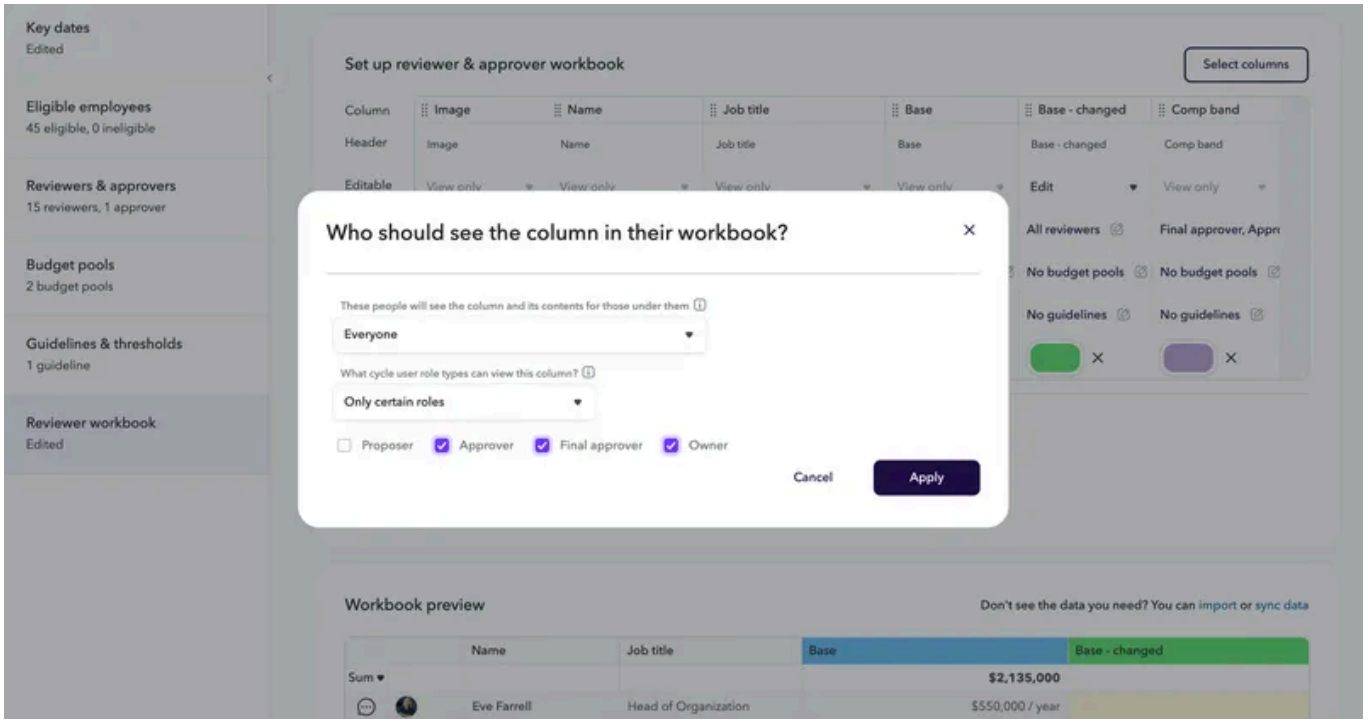
To remove a column from the reviewer workbook:

1. In the **Set up reviewer & approver workbook** section at the top, select **Select columns**.
2. Uncheck the column you want to delete.
3. Select **Apply**.
    - The column is removed from the workbook and does not display to reviewers and approvers.
    - Your settings are automatically saved.

Configure a column so that only specific roles can see it

You can configure specific columns so that only individuals with specific compensation review cycles roles can view it (for example, only Approvers can see it or only Final approvers can see it).

> These visibility settings are based on user roles within the compensation review. They are not based on general ChartHop user access roles.



Cycle user role types

To configure a column's visibility based on a person's role in the compensation review:

1. In the **Set up reviewer & approver workbook** section at the top, select the column you want to customize.
2. Select the edit icon in the **Visible to** row for that column.
3. Choose the cycle roles that can view this column in the **What cycle user role types can view this column? dropdown**. You can select from the following:
    - Proposer
    - Approver
    - Final approver
    - Owner

4. Select **Apply**.

When you specify both a department, team, or location requirement and a cycle role requirement, the user must meet all requirements so that the column displays. For example, if you configure the column so that only the Approvers in the Finance department can view it, the user must meet both requirements to see the column.

Freeze columns in the reviewer workbook

You have the ability to freeze columns on the left side of the reviewer workbook to make it easier for your reviewers to view the information they need.

To freeze columns:

1. In the **Set up reviewer & approver workbook** section, navigate to the **Workbook Settings** section. These settings apply globally to your reviewer workbook.
2. Enter the number of columns you want to freeze in the **Frozen columns** field.
    - Columns are frozen starting from the left side of the reviewer workbook.
    - Your settings are saved automatically.

You can preview the look of your frozen columns in the **Workbook preview** section underneath.

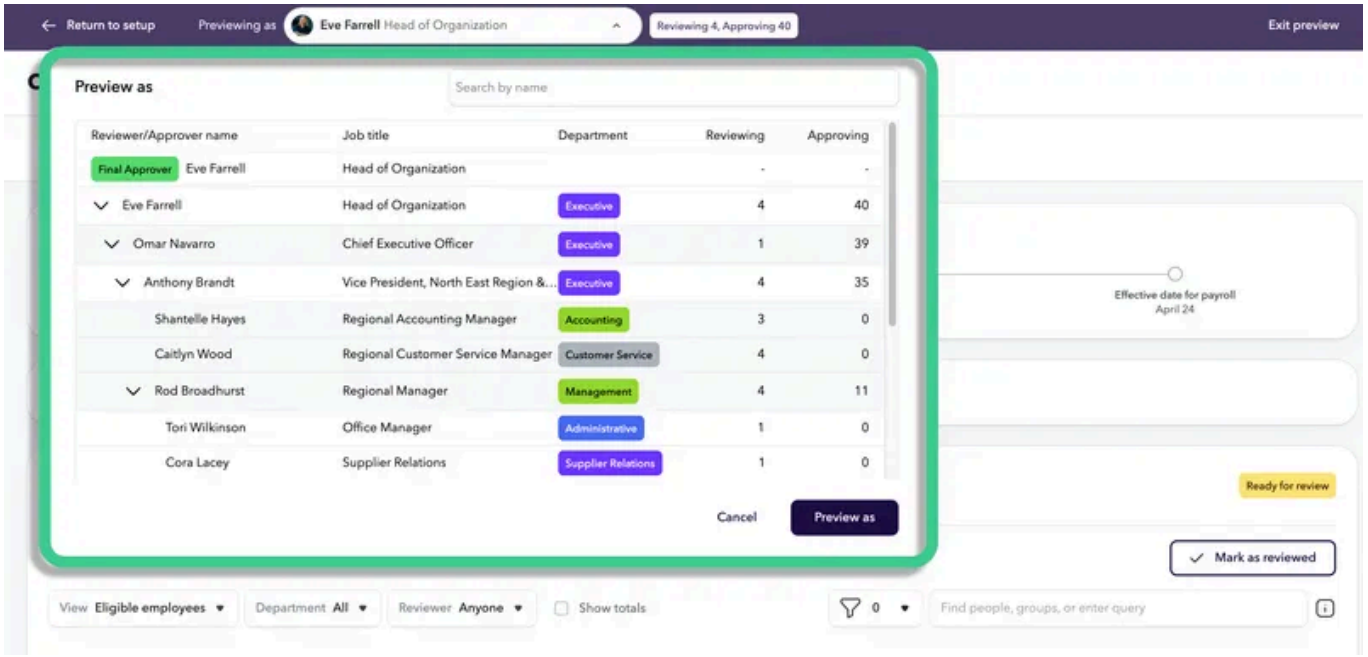
> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.2.8. Preview and test a compensation review

Once you're finished setting up the compensation review, you can preview and test the entire compensation review. ChartHop sets up a full test run of the compensation review as it displays to all reviewers and approvers. This test run is available only to you; reviewers and approvers can't access the compensation review.

You can choose to preview the compensation review as a specific reviewer so that you can test and confirm that they're seeing the right people and guidelines. The compensation review is also fully editable, meaning you can also enter changes to see how those amounts affect the budget pools you set up and evaluate how your calculations are working. Any changes you make inside the preview are not saved.

> Only one compensation review owner can preview/test at a time. When another compensation review owner changes the cycle settings, the compensation review preview is no longer available and must be regenerated so that it reflects the current settings.



To preview and test the compensation review:

1. Open an existing compensation review with a status of **Not started** or **Paused**.

    - You can't preview a compensation review with a status of **Active**.
2. From any setup tab, select **Preview & test** at the top right of the screen.
3. Select **Preview & test** in the dialog.
4. Select a specific reviewer or approver to preview as. The number of employees they are reviewing and/or approving displays next to their name in the banner at the top of the screen.
5. Use the dropdown list to select another reviewer or approver.
6. Once you have finished previewing, you can select **Exit preview** or **Return to setup** to return to the compensation review set up.

> When you set up a preview, ChartHop verifies that all reviewers and approvers have access to ChartHop. If a reviewer or approver does not have access, ChartHop sends an email inviting them to ChartHop.

5.6.2.9. Launch a compensation review

When you launch your compensation review, it changes the status from **Not started** or **Paused** to **Active**.

> When a compensation review is **Active**, you cannot make any changes to the compensation review cycle settings. To make changes, you must pause the compensation review. **Learn more.**

Once you launch, all reviewers and approvers have immediate access to the compensation review. ChartHop sends them a notification to let them know they can go ahead and get started.

To launch a compensation review:

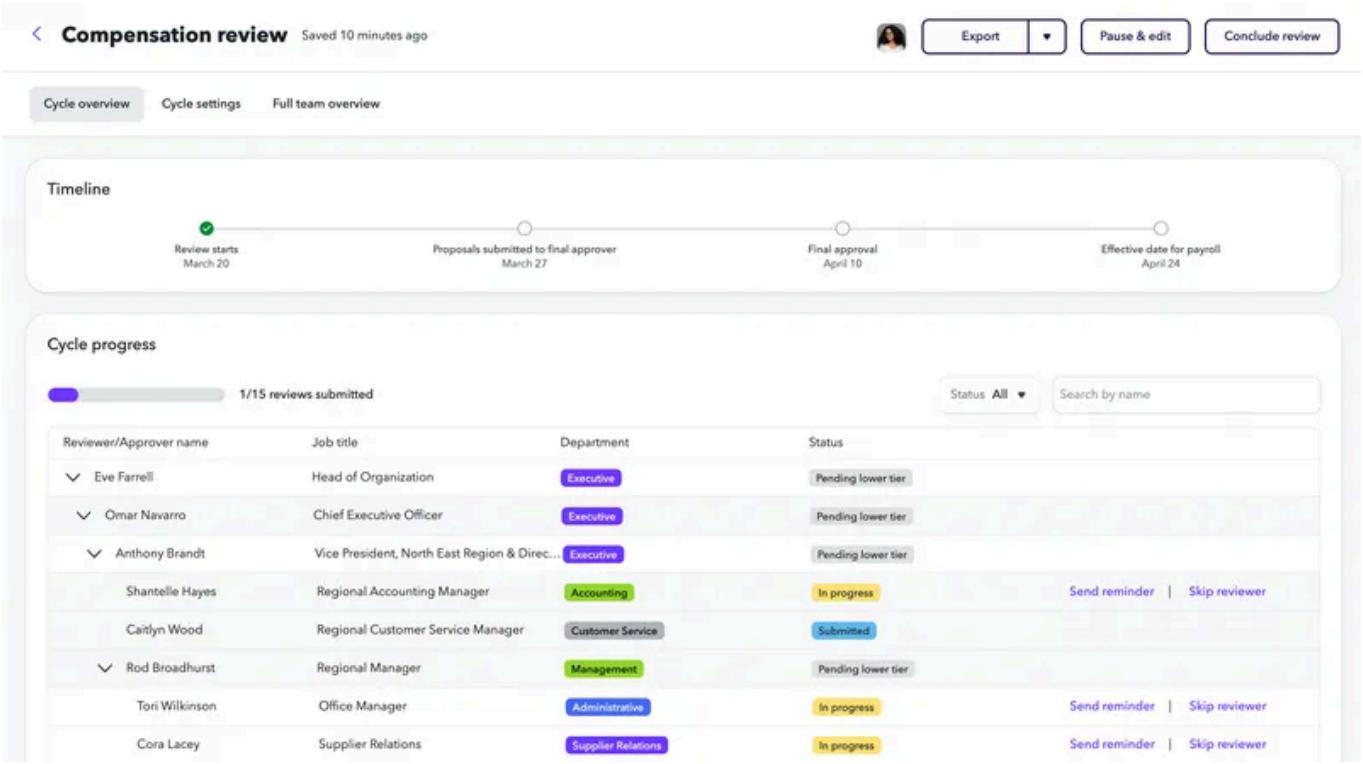
1. Open an existing compensation review. The compensation review must have a status of **Not started** or **Paused**.
2. Select **Launch** at the top right of the screen.
3. Select **Launch**.
4. Select **Go to Review** to go to the Cycle overview of your compensation review.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.3. Managing a compensation review

Once you've launched a compensation review, you can use the Cycle overview to see the overall progress of the review cycle.

The timeline lets you know the current step of the compensation review process and the Cycle progress shows you where each of your reviewers and approvers is in the process. You can also send reminders to make sure reviewers and approvers keep the compensation review as a priority.



Cycle overview

Compensation review proposals can display in the Cycle overview with the following statuses:

- **In progress** - Indicates the reviewer or approver is currently reviewing.
- **Pending lower tier** - Indicates the approver is waiting on submission from a reviewer that is below them in the compensation review reporting structure.
- **Submitted** - Indicates the review has been submitted.
- **Skipped** - Indicates the review has been skipped (either manually or automatically).

Pause and resume a compensation review

You can temporarily pause an active compensation review to make additional adjustments or edits to the following:

- Reassign a reviewer
- Add an eligible employee to the compensation review
- Remove an eligible employee from the compensation review
- Change budgets and guidelines settings

When you pause a compensation review, all reviewers and approvers are blocked from accessing the compensation review for a temporary period. They can access the compensation review again only once you have resumed the compensation review.

To pause and resume an active compensation review:

1. Open an existing compensation review with a status of **Active**.
2. Select **Pause & edit** at the top right of the screen. The **Pause comp review** dialog displays.
3. Select **Pause**. This pauses the compensation review and makes the settings fields available for editing.
4. In the **Cycle settings** tab of the compensation review, make edits to the settings you want to change.
5. Once you're finished editing, select **Resume review**. The **Resume comp review** dialog displays.
6. Select **Resume**. The compensation review is active and all reviewers and approvers are able to access the compensation review once again.

Manually skip a reviewer

In cases where a reviewer or approver is not available and has not completed their review, you can manually skip and advance proposals to the next reviewer in the reporting structure using the **Skip reviewer** option in the Cycle overview list.

When you select **Skip reviewer** for any reviews that are in progress, the original reviewer is notified that their review was skipped. The proposal becomes read-only for the skipped reviewer; however, any changes that were made prior to the skip are maintained and forwarded to the next reviewer.

> Only compensation review owners and collaborators have the ability to manually skip reviewers. Collaborators must have Edit & Submit permission and can only skip the reviewers and approvers they're assigned to collaborate with.

Send a reminder to a reviewer

You can send friendly reminders to reviewers and approvers to encourage them to complete their compensation review proposals.

To send a reminder:

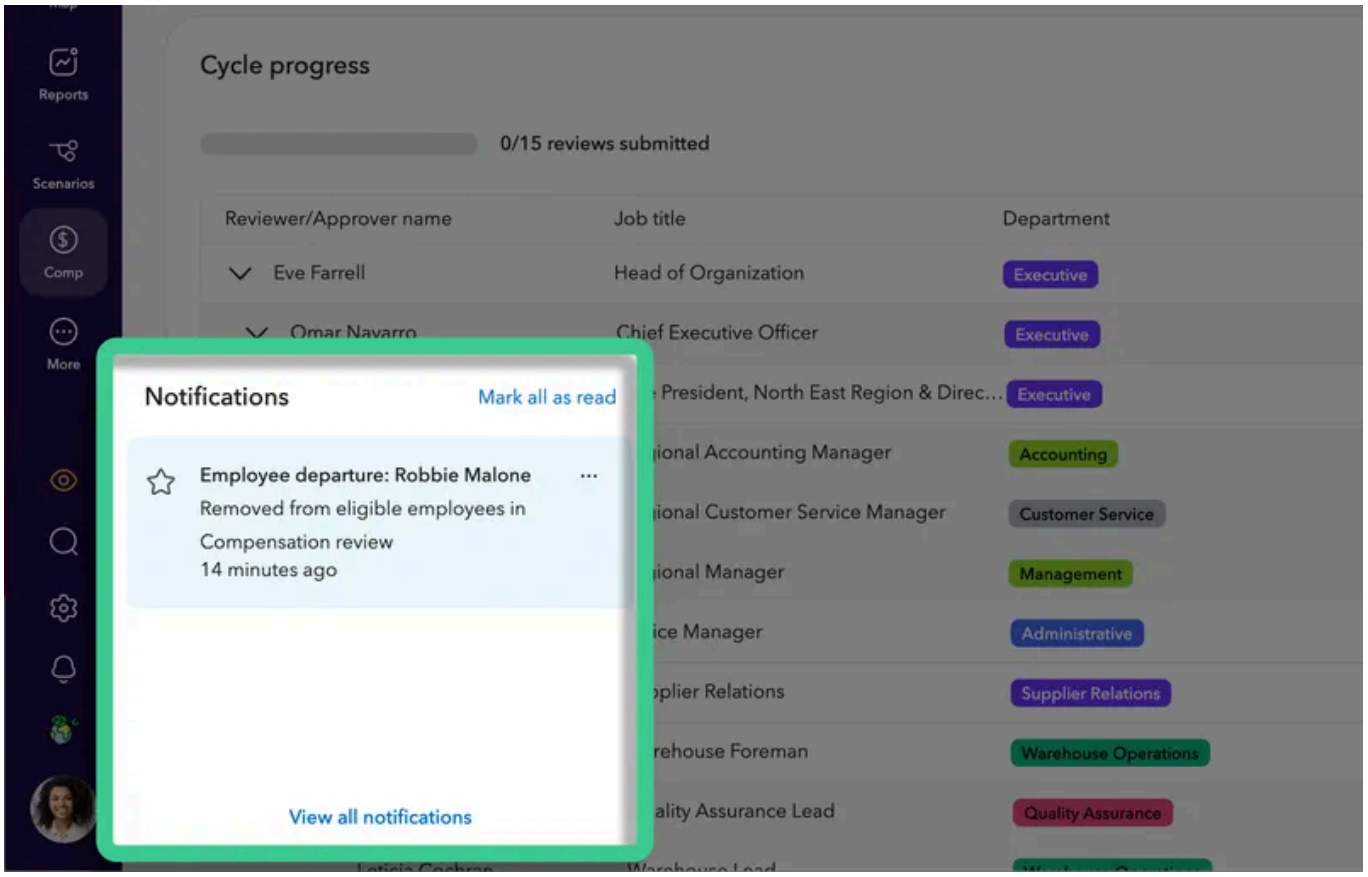
1. Access the compensation review you’re participating in.
2. Navigate to the **Cycle overview** tab.
3. In the **Cycle progress** section, identify the reviewer or approver you want to remind.
4. Select **Send reminder**. ChartHop sends an email reminder to the reviewer or approver.

View notifications

ChartHop notifies you, the compensation review owner, when specific events occur in your ChartHop organization that affect your active compensation review.

For example, when a departure occurs that impacts the compensation review, ChartHop automatically handles this departure by:

- notifying you of the departure within the Notifications dialog from the left sidebar
- automatically removing the departed employee
- automatically reassigning any reviews and approvals to the departed employee's manager



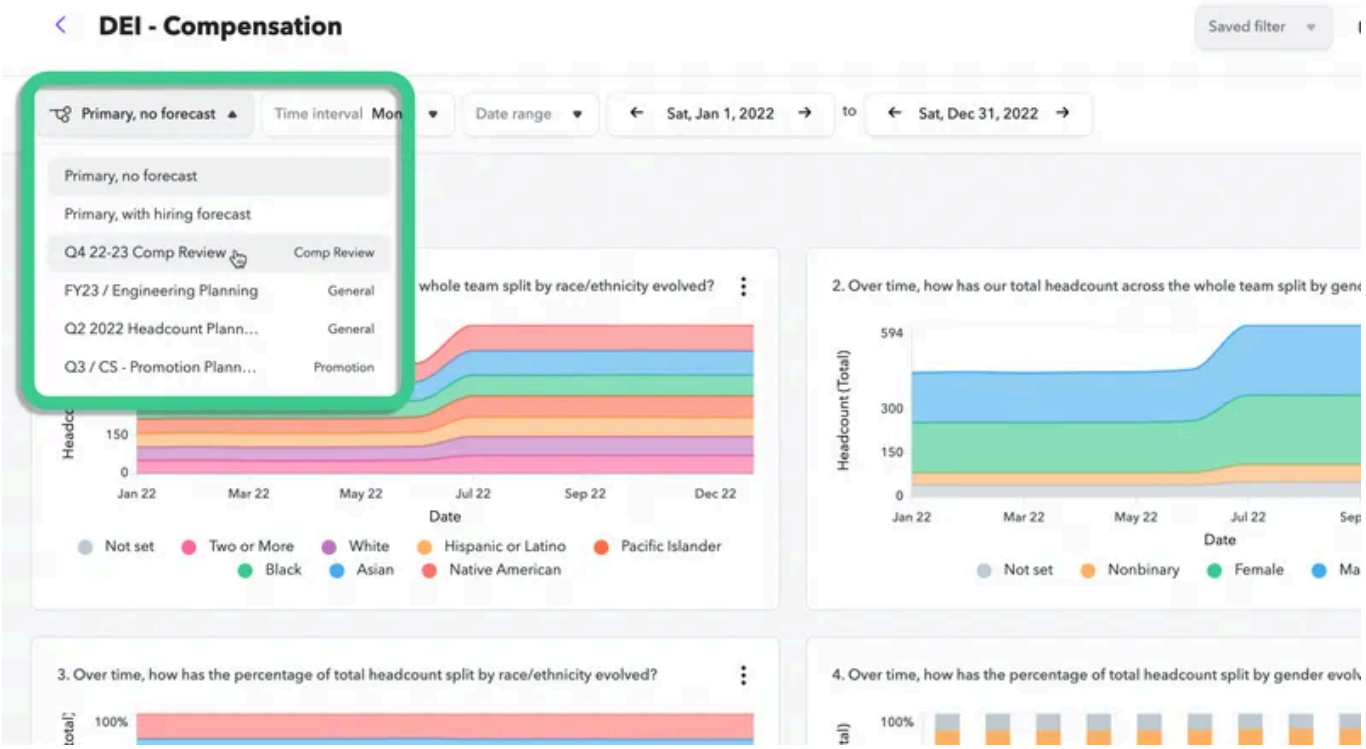
Compensation review notifications

View reports for a compensation review

After you launch your compensation review, you can use the data set from the compensation review within ChartHop reports.

When you access a report and select the **Scenario** dropdown, any launched compensation reviews you have access to display within the dropdown options.

> You must be an **Owner** of a compensation review to be able to view and select it from the **Scenario** dropdown.



Comp Reviews in Reports

Export comments in a compensation review

You can export all comments that are entered in a compensation review. This helps you compile all the comments made throughout the entire cycle in a spreadsheet for additional portability and transparency.

To export a spreadsheet with all comments from your compensation review:

1. Open an existing compensation review.
    - The compensation review can be **Active**, **Complete**, or **Closed**.
2. From the **Export** dropdown at the top right of the screen, select **Export comments**.
3. In the **Export Comments** dialog, select **Export**.
    - ChartHop generates a spreadsheet with your compensation review comments.
    - Each row in the spreadsheet includes a separate comment. Employees with multiple comments will display in multiple rows.
4. Once the spreadsheet is done generating, the spreadsheet downloads automatically.
5. Select **Done** when you're finished downloading.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.6.4. Concluding a compensation review

You can conclude a compensation review at any time. Concluding the review closes it and removes edit access to all reviewers and approvers, including final approvers. Changes cannot be made to the compensation review after it has been concluded.

When you conclude a compensation review, you have the ability to include whether the compensation review was concluded with or without final approval.

To conclude a review:

1. Open an existing compensation review. The compensation review must be currently active.
2. Select **Conclude review** at the top right of the screen. The **Conclude comp review** dialog displays.
3. In the **Conclude comp review** dialog, select whether the compensation review cycle is being concluded with or without approval:
    - **Conclude without final approval** - Select this option when the changes proposed in this cycle have not been fully approved and you are closing this compensation review for other reasons. This changes the status of the compensation review to **Closed**.
    - **Conclude with final approval** - Select this option when the final approvers have marked all proposals as reviewed and given their final approval to all proposed changes. This changes the status of the compensation review to **Approved**.
4. Select **Conclude**. This completes and updates the compensation review cycle status to either **Approved** or **Closed**.

Reopen a closed compensation review

Closed compensation reviews can be reopened, but only owners and final approvers can make changes to the compensation review data.

To reopen a closed compensation review:

1. Open an existing compensation review. The compensation review must be currently closed.

2. Select **Reopen review** at the top right of the screen. The **Reopen comp review** dialog displays.
3. Select **Reopen**. The compensation review returns to an active state. Owners and final approvers can make changes to the compensation review.

Export changes

Once a compensation review is closed, you can export the compensation changes made during the review to a spreadsheet that you can then upload to your payroll system.

To export a spreadsheet with the results of your compensation review:

1. Open an existing compensation review. The compensation review must be currently closed.
2. Select **Export** at the top right of the screen. The **Export spreadsheet** dialog displays.
3. Select **Export**. ChartHop generates a spreadsheet with your compensation data.
4. Once the spreadsheet is done generating, the spreadsheet downloads automatically.

> You may need to adjust column names in the spreadsheet to match the standards for your payroll system.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.5. Compensation reviews owner FAQs

This topic answers frequently asked questions about owning a compensation review in ChartHop.

General questions

What information do I need before I begin a compensation planning cycle?

We recommend identifying the following information before you begin:

- A timeline for your compensation review cycle, including start and end dates
- Criteria for determining employees as eligible for your compensation review
- Your list of reviewers and approvers
- Budget information and how you plan on allocating funds
- The type of data you want your reviewers and approvers to have available during the compensation review cycle (for example, performance review data, last raise data)
- A general knowledge of how compensation reviews work in ChartHop

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Once we have access to the newest version of Compensation reviews, will we still have access to our legacy compensation review scenarios?

Yes - you will continue to have access to your legacy compensation reviews in the form of archived scenarios. No data is deleted; however, we recommend that you archive all open compensation planning scenarios.

If I'm currently running a compensation review cycle using the legacy version, can I switch that cycle to the newest version?

Unfortunately, no. If you're currently running a compensation review cycle using legacy compensation reviews, you cannot update to the newest version until your current cycle is completed. This will help prevent any interruptions or delays to your current compensation review cycle.

Can a person that is not currently in the Org Chart (such as an HRBP) be the owner of a compensation review?

Yes - as long as they have the access roles of Owner, Technical owner, or Compensation viewer assigned in ChartHop.

Compensation review setup

Key dates

Do I have to launch my cycle on the Cycle starts date?

No, as the compensation review owner you have access to the **Launch** button whenever and can launch the cycle on a date different from the cycle starts date. However, to avoid confusion, ChartHop recommends launching on the Cycle starts date because that is the date that displays to the user in the timeline.

Eligible employees and reviewers and approvers

Are new hires included in my eligible employee list if their start date is during the compensation review cycle?

It depends on your configuration. ChartHop uses the structure of your org chart on the *Final approval due* date to organize and populate your compensation review cycle. **Learn more.**

- If the new hire starts before the Final approval due date, AND you have not set any eligibility exclusions based on start date, then the new hire is included in the eligible employees list.
- If you set up exclusions based on start date (for example, you're excluding employees hired after a specific cutoff date), then the new hire will display in All Employees lists but will not be considered eligible because they have been hired after the cutoff date you specified.

Any employees hired after the Final approval date are automatically excluded from the compensation review cycle.

Can I assign a person as a reviewer when they are not currently in the Org Chart (for example, people business partners)?

A ChartHop user outside the immediate reporting structure of the employee pod can be reassigned as a reviewer. Please note that this gives the user full access to all sensitive data for employees in that compensation review pod.

The previously assigned manager displays in the **Removed managers** list in the **Reviewers & approvers** tab. Learn more.

Is there a way to export the list of eligible and ineligible employees?

Yes - you can select the **View on Data Sheet** button in the **Employees** section of the **Eligible Employees** tab to automatically create a **Data Sheet** view that is populated with the corresponding employees (depending on the tab you have selected - either **Eligible** or **Ineligible**). From there, you can export the list of employees as a .csv file and easily share that list with leaders outside the compensation review cycle configuration.

Budgets and Guidelines

Can I stop reviewers and approvers from going over budget?

Budgets will show when they've been exceeded, but as of right now, the user is not locked out of editing their reviewer workbook and from going over budget. Approvers have the ability to reject proposed changes with feedback.

How many budgets can I set up?

You can set up as many as you'd like, however you may want to consider ease of use and navigation for your reviewers and approvers. Too many budgets can get confusing for your reviewers and approvers.

Are multiple currencies supported for budgets?

Yes - multiple currencies are supported.

For budgets calculated in percentages:

- Budgets default to the default org currency when there is a mix of different local currencies in the reviewer workbook. For example, when a reviewer workbook contains one employee who is paid in USD (the default org currency) and another who is paid in GBP, the budget displays the total amounts in USD plus the amounts in GBP converted to USD.
- If the reviewer workbook contains amounts that are all in the same currency but that currency is NOT the default org currency, the budget will display in that currency. For example, when the reviewer workbook contains employees who are all paid in GBP, the budget displays totals in GBP.

For fixed budgets, you can indicate the currency in which the budget is represented.

Can I set up a budget calculation using a smart calculation custom field?

Yes - you can configure a smart calculation custom field to affect your budget and guideline calculations.

Can I allow a budget to calculate amounts based on shares instead of currency?

Yes - if you use the Planned Grant (Shares) `grantShares` data category instead of the Planned Grant (Value) `grantValue` data category, you can set up a budget calculation using those shares.

Can I make it so that reviewers and approvers can't make any changes outside of the guidelines or target values I've defined?

Unfortunately, this is currently not possible. However, you can set up your compensation review to flag any values that exceed a defined threshold beyond the guidelines you set up. When looking at any table of employees in the compensation review cycle, you can easily filter to display **Employees with exceptions** to display the employees whose compensation was flagged beyond the guideline threshold you define. **Learn more.**

Reviewer workbook

How do I make editing of a column conditional?

You can use the **Edit Only if** option when setting up the reviewer workbook to make certain fields/columns editable only under specific conditions. **Learn more.**

Can I hide columns in the reviewer workbooks based on departments or other filter parameters?

Yes! You can use the **Visible to** option when setting up the reviewer workbook to control how your columns display.

Can I tie promotions into the compensation review?

If you store promotion data within another field in ChartHop, you can include that field as a column in the reviewer workbook. You can also set up a column, for example: New Title, to be editable in the reviewer workbook. However, please note that there is no Merge to Primary option to store these changes in ChartHop at the conclusion of a compensation review.

How do I display compa-ratio information in my compensation review?

You can use the `compaRatioMid` data category to display a compensation band's midpoint (the job's base pay, divided by the midpoint of its compensation band, as a percentage).

You can also use the `compaRatioTarget` data category to display the compensation band target (the job's base pay, divided by the target pay of its compensation band as a percentage).

Preview & test

Can I test the entire compensation review cycle before I launch it?

Yes! You can use the Preview & test feature to completely test all aspects of your compensation review. You can select to view the compensation review as a specific person, enter compensation changes to test budget calculations and guidelines, and even submit proposed changes to test the approval structure. After you're done previewing and testing, any changes you may have made are deleted.

Do all participants in my compensation review cycle need to be active users in ChartHop for me to preview and test?

Yes - in order for ChartHop to fully build an accurate preview of your compensation review cycle, your participants must be active users in ChartHop. When you preview & test, a ChartHop invitation is automatically sent to any participants who aren't current ChartHop users (as long as they have valid work email addresses).

Please note, users must only be active users, they don't have to be invited to the compensation review yet.

Does the View as ability in Preview & test take into account role sensitivity?

When you preview & test as a specific person, you see information based on what the specific person can see.

Can I test my calculations without using the Preview & test feature?

To test your budget and guideline calculations without using the Preview & test feature, you can select the **Calculate** button directly from the **Budgets** and **Guidelines** tabs in the Cycle settings.

During a cycle

As an owner, do I have the ability to see the status of approval chains for various groups?

Yes, as the owner of a review you can see the entire compensation review timeline, along with the Reviewers and approvers tree and their approval status directly within the **Cycle overview** tab. **Learn more.**

What happens if a re-org happens or if a manager change happens during an active cycle?

When a manager who is part of your compensation review cycle departs during the review cycle, ChartHop automatically reassigns their reviews to the next manager in the approval tree structure and notifies you of the change.

If other changes do occur, you have the ability to pause the review and reassign a reviewer or approver within the compensation review **Cycle overview** tab.

As an owner, do I have the ability to go in and make edits/adjustments to proposed changes within a compensation review?

You can only make or propose changes to compensation when you are also an assigned reviewer. In that case, you can edit compensation for the employees assigned to you for review. If you are not assigned as a reviewer, you cannot make any edits to compensation.

Final approvers have the ability to make adjustments to compensation only at the end of the review cycle once all reviews have been submitted to them for approval.

As an owner, can I give edit access back to a reviewer (for example, when there is a mistake that was already submitted)?

Approvers have the ability to reject a proposal and send it back to the requester. In your capacity as owner, you can pause the compensation review cycle and reassign the reviews to another reviewer.

How do data integrations work with compensation reviews? For example, what happens when an employee's compensation data is updated within the payroll system during an active compensation review cycle and that updated data flows back to ChartHop?

Any changes made in the payroll system are updated within the compensation review after it flows back into ChartHop. This helps make sure that your budget calculations are using the latest available data.

The only way to currently prevent any updates to compensation data from happening is by temporarily disabling the payroll app sync for the duration of the compensation review cycle.

Can I add an eligible employee to an already launched Compensation review?

Yes - you can pause the review and add specific employees to the compensation review. **Learn more.**

Can I exclude an employee from the compensation review after it has already launched?

Yes - you can pause the review and exclude specific employees who were previously included as eligible. **Learn more.**

Can reviewers see who the final approver is at any stage of the cycle?

No, reviewers cannot see the identity of the final approver. Only compensation review owners can set up and view who final approvers are.

Do I have to wait until the cycle is over to export to CSV?

As a compensation review owner, you can export a CSV any time after you've launched a cycle, even while it is currently in progress.

After a cycle

My final approvers have not given their approval by marking the proposed changes as reviewed but I need to close the compensation review due to other circumstances. Can I conclude the compensation review?

Yes - as the compensation review owner, you have the ability to conclude the compensation review and specify whether it was concluded with or without final approval. This gives you the flexibility to conclude a compensation review without waiting for your final approvers.

After a compensation review cycle, can I export a .csv with additional fields that weren't included in the reviewer workbook?

No - you can only export the field columns that you included in your reviewer workbook configuration.

When a compensation review cycle is complete, do I still have access to the approvals timeline?

Yes - once a compensation review cycle has been concluded, the **Cycle overview** tab displays in a view-only mode.

Do compensation letters work with this newest version of compensation reviews?

Yes - you can configure templates to work with the updated compensation values from the newest version of compensation reviews.

Are the history of changes made to a person's compensation tracked?

ChartHop stores this data in our backend. Future iterations of compensation reviews will surface this data.

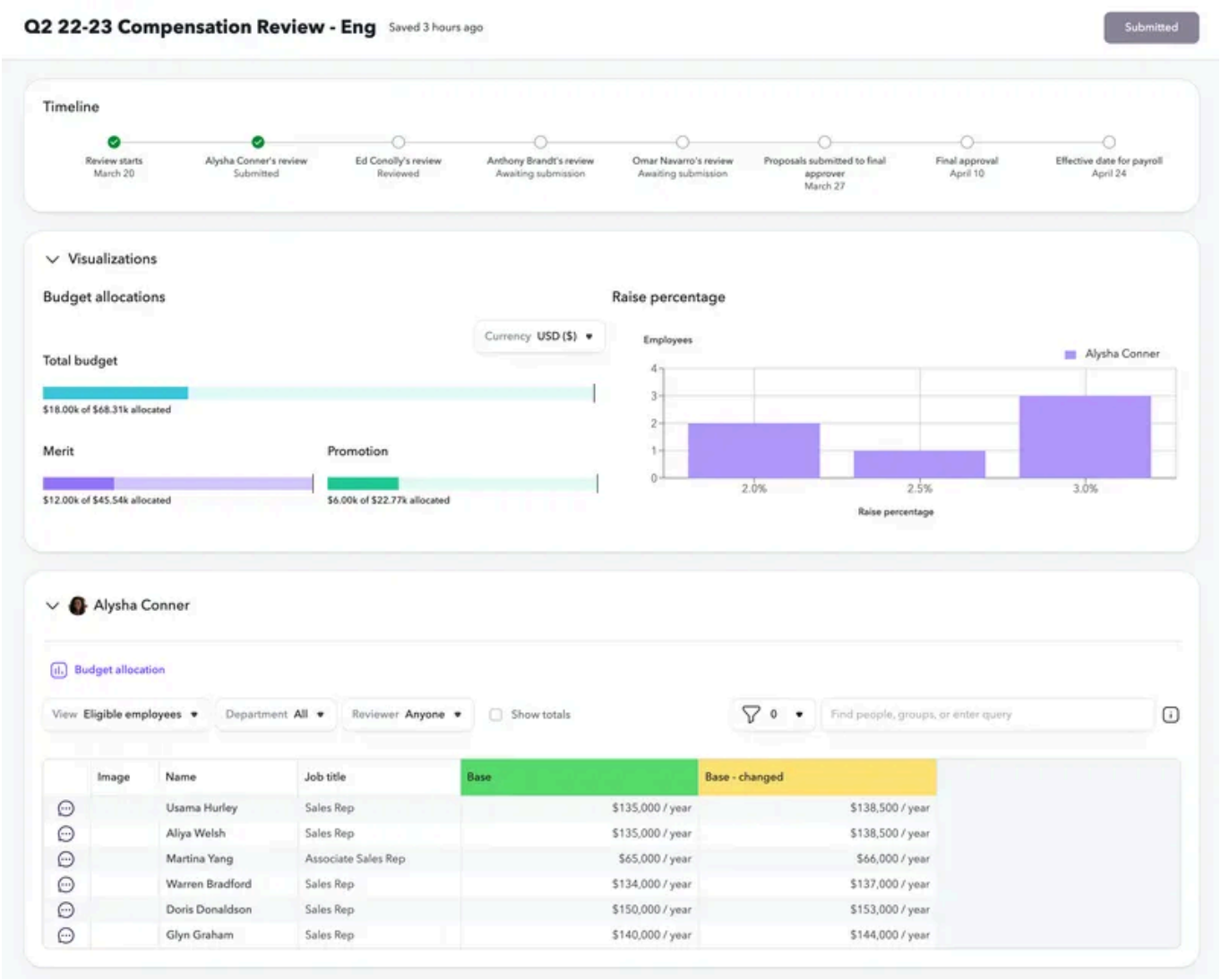
> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.6. Participating in a compensation review

ChartHop centralizes and visualizes employee data so that you have the information you need to make confident and transparent choices when reviewing employee compensation.

When you join a compensation review, you get a clear picture of the following:

- The complete compensation review cycle timeline, so you know who will review and approve your proposals and when.
- Budget allocations relevant to your group of employees, updated in real-time so you can see the financial impact of your proposed compensation changes.
- Performance and compensation data for the employees whose compensation you're reviewing, so you can make data-backed decisions.
- Compensation target and range guidelines so that you can be confident that your proposals are on the mark.
- Comments and feedback from reviewers and approvers in the review structure to encourage transparency and collaboration.



Access compensation reviews

When you're added to a compensation review cycle as a reviewer, approver, or collaborator, you'll receive an email invitation asking you to join the compensation review in ChartHop.

To access a compensation review to which you've been invited:

1. From the left sidebar, select **Comp Reviews.**
2. Select the name of the compensation review.

> Compensation reviews must have a status of **Active** for you to be able to access them.
>
> When a compensation review has a status of **Paused**, you cannot access it until your compensation review admin resumes the review.

Packages: Basic | **Standard*** | **Premium**

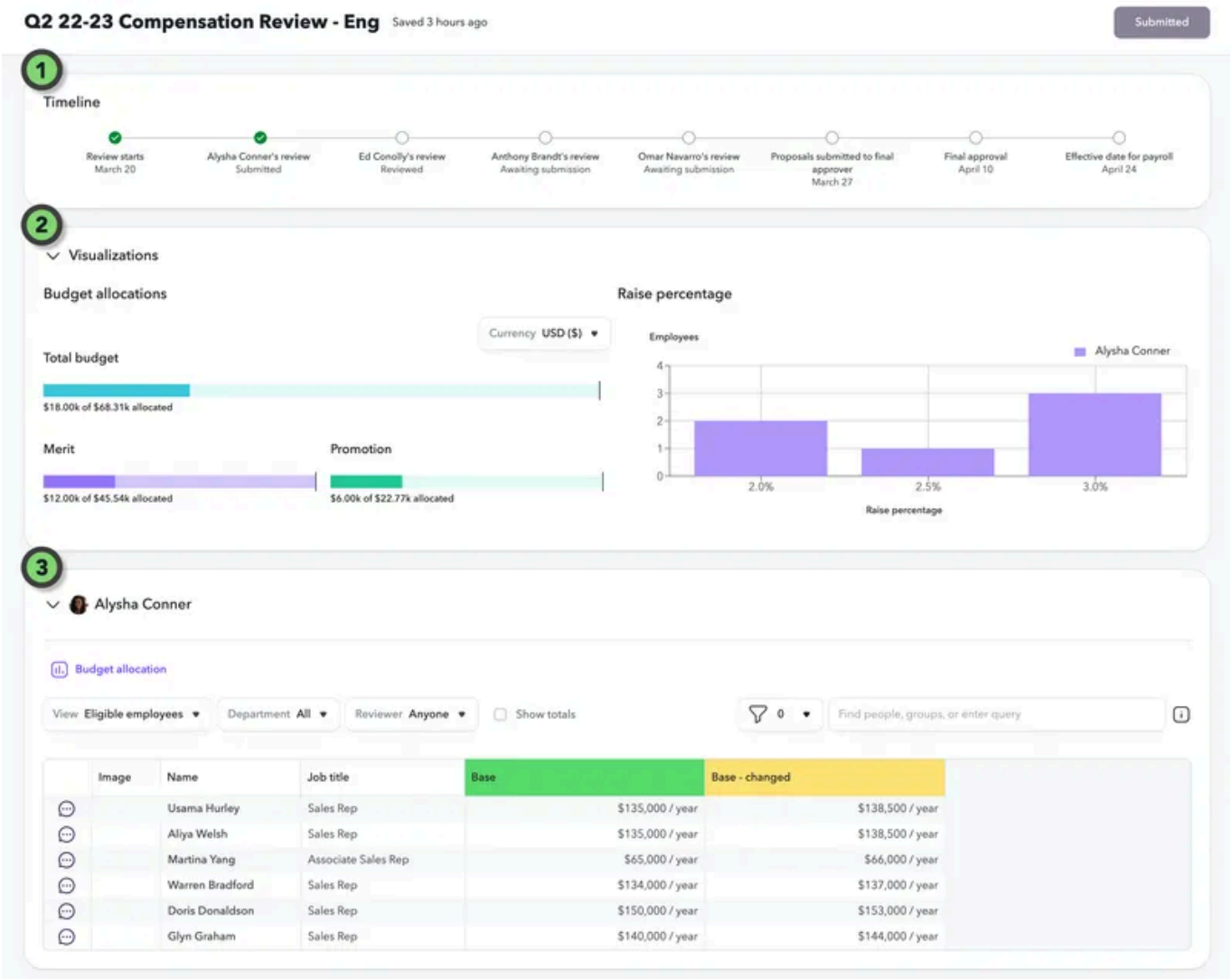
* Available as an add-on

5.6.6.1. Reviewing employee compensation

Once you access a compensation review, the reviewer workbook displays. Depending on how many levels of employees you're reviewing, you can review compensation changes just for one level or review and approve multiple levels of proposals.

In the reviewer workbook, you can see the following sections:

1. Timeline
2. Visualizations
3. Reviewer workbook table



Timeline

Displays each step of the review cycle process, including submission statuses, key dates, and the names of each reviewer and approver. By looking at the timeline, you can easily see where in the process your proposals are and who is currently reviewing them.

Visualizations

Visualizations show the real-time impact of changes to compensation.

The Budget allocation displays the budgets to which you have access and their real-time status. You can easily see whether a budget allocation has been met or if there's extra room in the budget. As you make changes to employee base values, the budget allocation charts update to reflect your impact to the budgets. You can hover over the budgets to view a tooltip with more information and a breakdown of each budget (for example, how much is remaining or how much is over budget). You can also change the currency of the budgets you are visualizing by using the **Currency** dropdown.

The Raise percentage displays the range of the raise percentages that you are being given in the current review. As you make changes to employee base values, the Raise percentage chart updates to reflect the impact of the raises you give. When you're reviewing multiple levels of reviews, the chart updates to show the raise percentage for each reviewer.

Visualizations can be collapsed at any time.

Reviewer workbook table

Displays the list of employees whose compensation you're reviewing and all their relevant performance and compensation data. When you have multiple levels of employee review, each level can be expanded and collapsed. The columns that display in the reviewer workbook table are customized to your company.

By default, all eligible employees display in the list. You can use the View dropdown to filter the list to display:

View	Description
All employees	Displays all employees underneath you in the review structure. This includes employees who are ineligible for the current compensation review (for comparison purposes).
Eligible employees	Displays only employees underneath you in the review structure who are eligible for the current compensation review.
Employees with comments	Displays only employees underneath you in the review structure who are eligible for the current compensation review who have comments entered by other reviewers and approvers.
Employees with exceptions	Displays only employees underneath you in the review structure with proposed compensation changes that exceed the established guidelines. Employees with exceptions can display with a flag icon next to the value in the Base raise amount column (depending on how your admin has configured the compensation review).

You can also use the **Department** and **Reviewer** dropdowns to filter by department and by specific reviewer:

- Selecting a department displays all employees in the specified department.
- Selecting a reviewer displays all the employees for whom the reviewer is responsible for reviewing and approving. This can include multiple levels of review, depending on the reviewer's position in the reporting structure.

Packages: Basic | **Standard*** | **Premium**

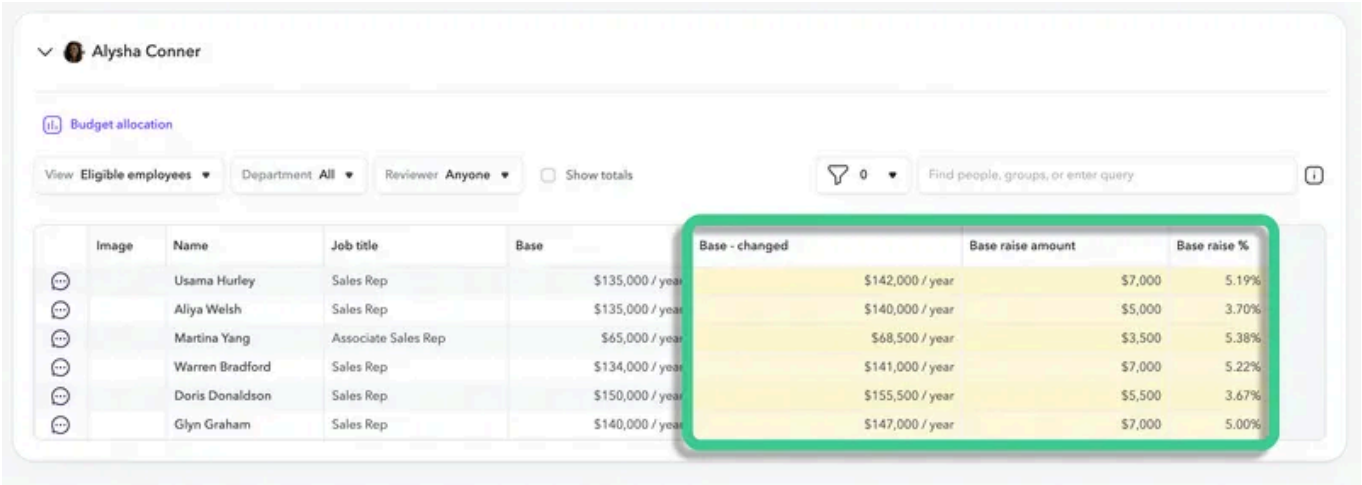
* Available as an add-on

5.6.6.1.1. Proposing changes

You can propose changes to an employee's compensation by editing the values in the yellow columns of the reviewer workbook table.

Depending on how your company has configured compensation reviews, the editable columns may be:

- prepopulated with suggested base change or raise amounts, or
- display with guideline columns next to them with target values and/or ranges.



Your company takes into account various factors (for example, employee performance, location, changes in cost of living, length of time since last promotion) and uses those to calculate and suggest a suggested raise amount (or guideline) for each eligible employee.

Edit compensation based on prepopulated amounts

When the editable columns contain suggested raise amounts, you can:

1. Review the suggested base change/raise amounts for each employee.
2. (Optional) Make changes to the amounts by:
    - Selecting a cell in the table and editing the value.
    - All editable fields in the table update automatically based on the numbers you enter.
    - The budget allocations and raise percentages update to reflect your changes. Budget allocations are pre-determined and set up by your compensation review

admin.
    - Any changes you make to the suggested compensation change get added to the total spend of the compensation review.
    - Select the **Show totals** checkbox to display all the totals in the top row of the table.
3. Your changes are saved automatically in the table.

Edit compensation based on guidelines

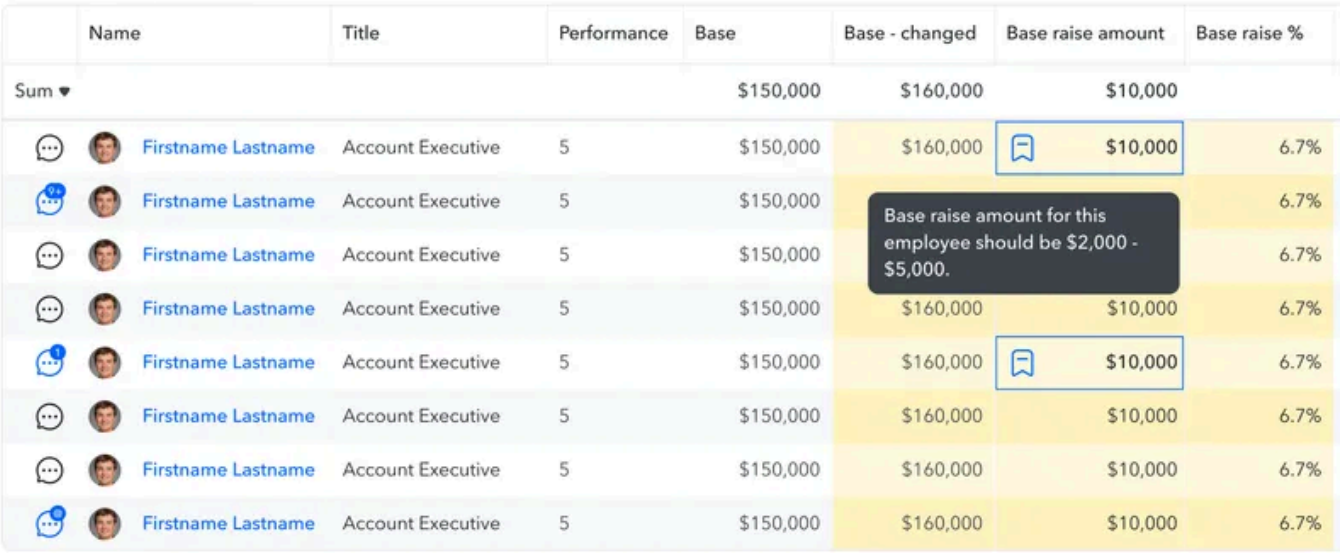
When the editable columns are blank, you can:

1. Review the suggested guidelines to see the suggested target value or suggested range.
2. Propose a compensation change by:
    - Selecting a blank editable cell in the table and entering a value.
    - All editable fields in the table update automatically based on the numbers you enter.
    - The budget allocations and raise percentages update to reflect your changes. Budget allocations are pre-determined and set up by your compensation review admin.
    - The difference between what you enter and the established guidelines for that compensation change get added to the total spend of the compensation review.
    - Select the **Show totals** checkbox to display all the totals in the top row of the table.
3. Your changes are saved automatically in the table.

Create an exception for an employee

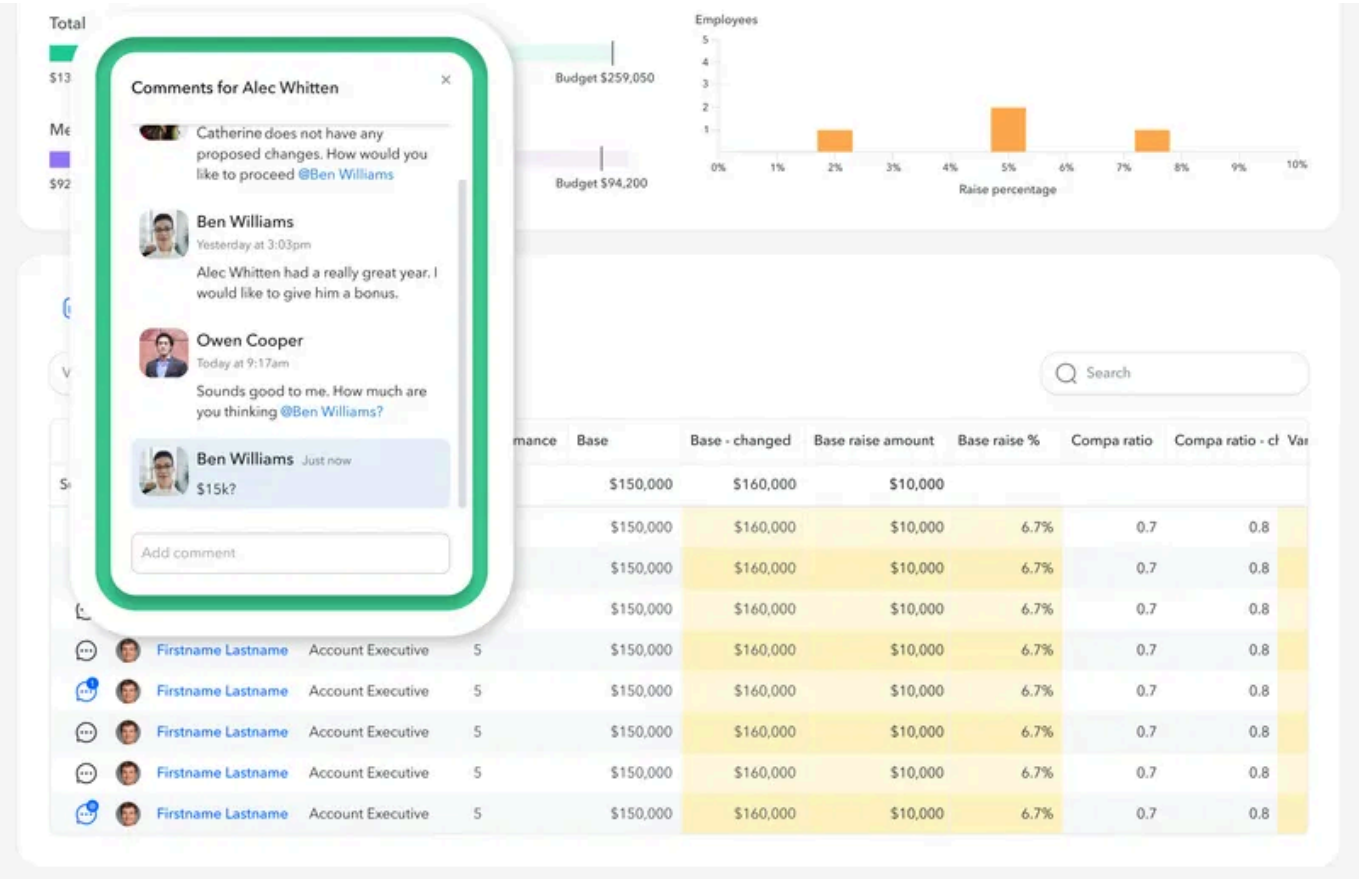
ChartHop empowers you to make the best decisions for your employees, so you do have the ability to bypass the suggested guidelines or suggested amounts for an employee for special circumstances.

When you enter a raise amount or base change that exceeds the suggested guidelines calculated by your company, a flag icon can display next to the amount in the table (depending on the configuration of your compensation review).



Hovering over the cell displays a tooltip with more information about the suggested guideline for that field, so you can see why the amount was flagged.

You can also add a comment to enter reasons for the exception by selecting the Comment icon next to the employee's name.

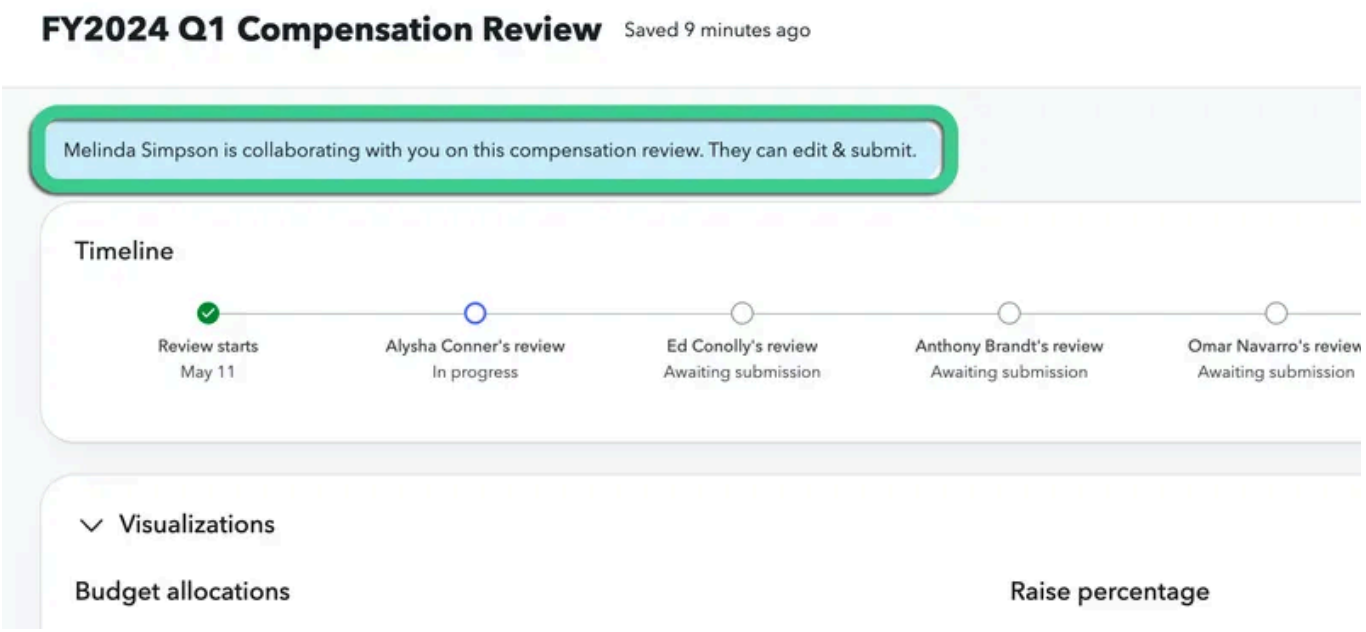


Working with a collaborator

Depending on your organization, you may be set up to work with a collaborator during the compensation review cycle. This person can be someone like an HR administrator or HRBP working with your organization.

When a collaborator is assigned to work with you, they can view your proposed compensation review changes. Depending on the permissions given to them, in some cases, they might even be able to edit and submit on your behalf.

When you open your compensation review proposal, the names and permissions of any collaborators display above the review cycle timeline. Please reach out to your compensation review cycle owner with any questions about working with additional collaborators at your organization.



Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.6.6.1.2. Submitting your proposal

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

Once you're done reviewing and editing compensation for all the employees assigned to you in the review structure, you must submit your changes to move them forward in the compensation review process.

Once you submit your proposed changes, you cannot make any more edits and the reviewer workbook table displays in view-only mode.

You are able to enter additional comments and view whatever changes and comments your manager (or next level reviewer) makes during their review of your proposal.

Submit proposal

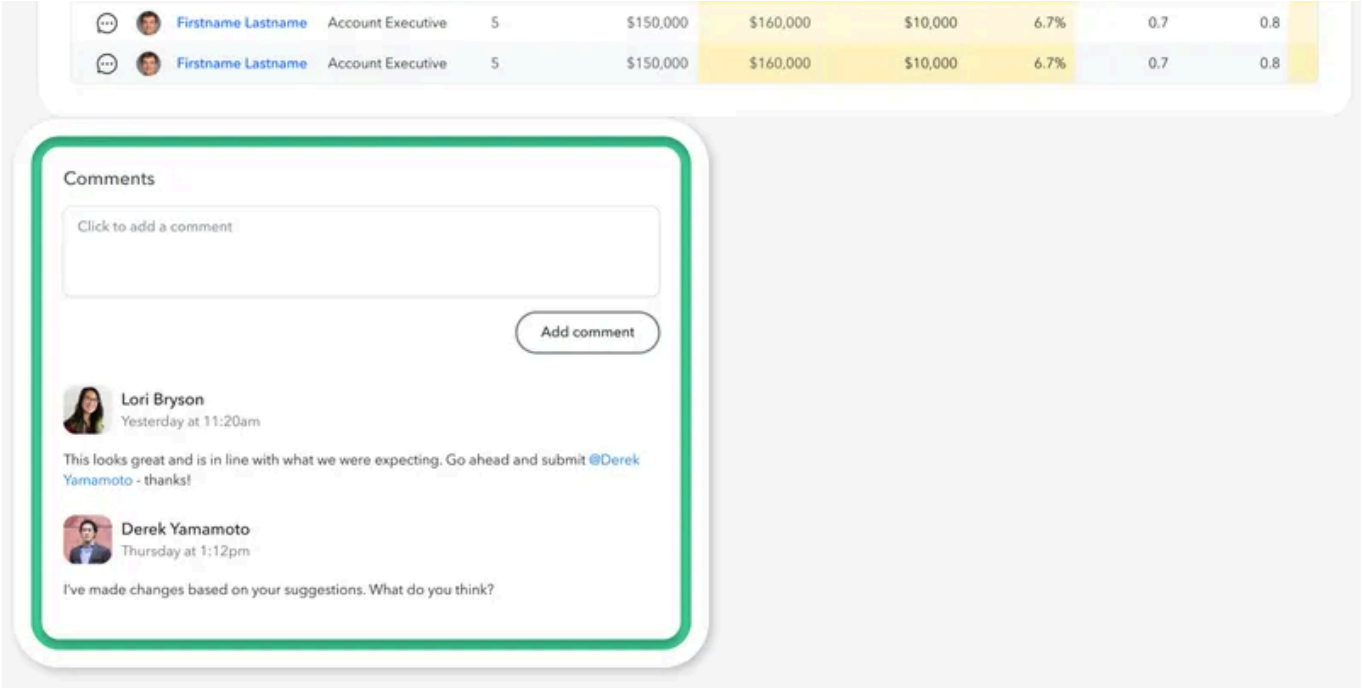
To submit your proposed changes to compensation:

1. Review all changes and edits you've made to compensation.
2. Select **Submit** or **Submit all** in the compensation review header.
    - For reviewers with only one level of review, the **Submit** button is always available for selection.
    - For reviewers or approvers reviewing multiple levels of employees, the **Submit all** button is available only when all employee levels have been marked as reviewed.
3. In the **Submit changes** dialog that displays, you can view the next steps of the approval process, including the names of reviewers and approvers who will review your proposed changes.
4. Select **Submit**.

Respond to a rejected proposal

In the case that your proposed changes have been rejected by an approver, you can enter the compensation review again and view the comments from your approvers for more information.

You have the ability to respond to employee-specific comments or overall comments in the Comments field.



Your comments are kept confidential and only the reviewers and approvers in your review structure have access to viewing and responding.

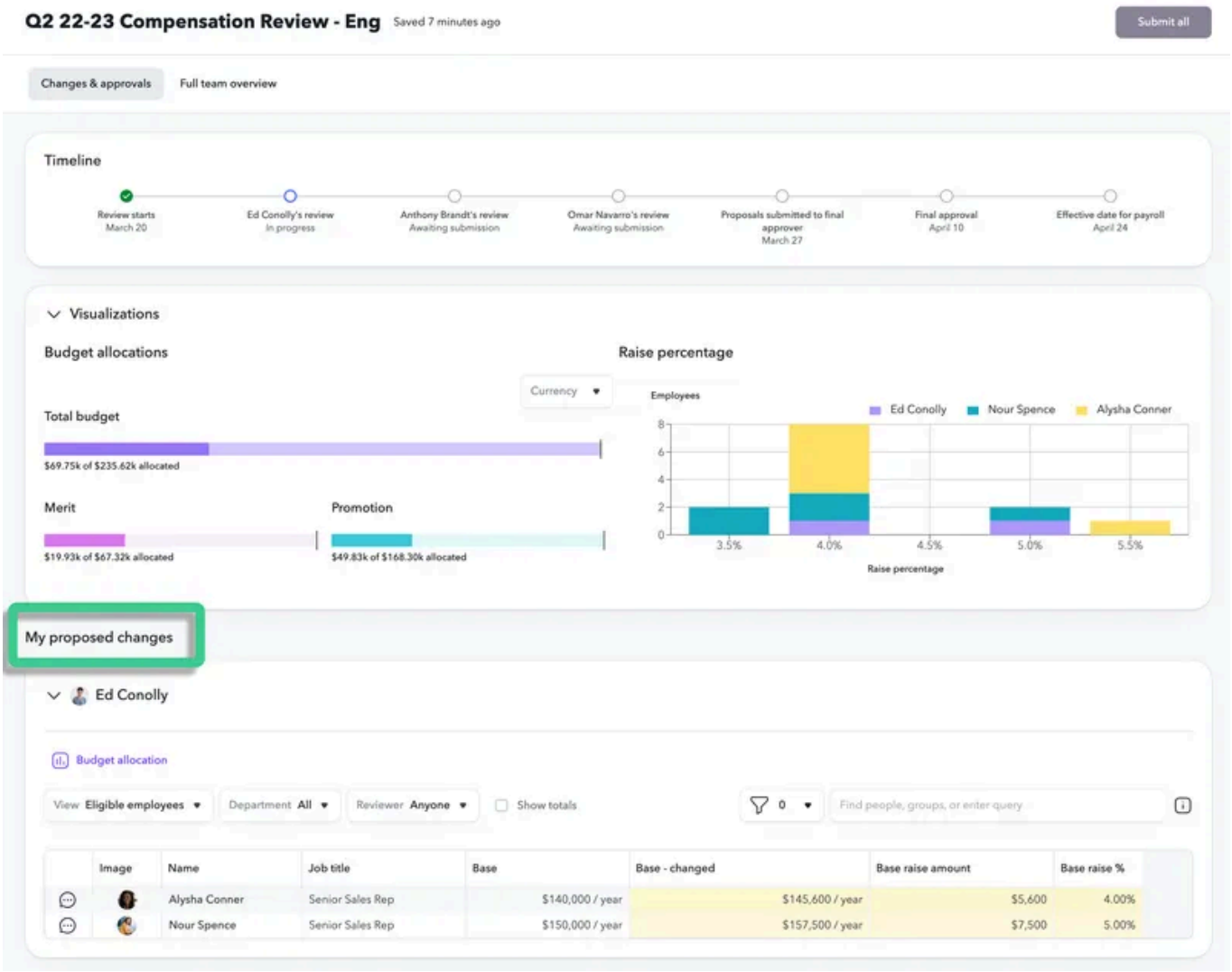
Once you're ready to adjust your proposed changes, you can update your compensation edits as needed and resubmit your proposals by selecting **Submit**.

5.6.6.2. Reviewing and approving proposals

Depending on your position in the compensation review process, you might not only be reviewing employee compensation for your group of employees, but also approving the proposals of reviewers beneath you in the review structure.

When you're also selected as an approver, you have the ability to see the changes and approvals for your immediate group but also see a full team overview with all other proposals you need to review and approve.

> You can use the Timeline at the top of the reviewer workbook to see where you are in the compensation review process.



Propose changes to compensation for my immediate group

To review and propose changes to employee compensation for employees who are under your level of review:

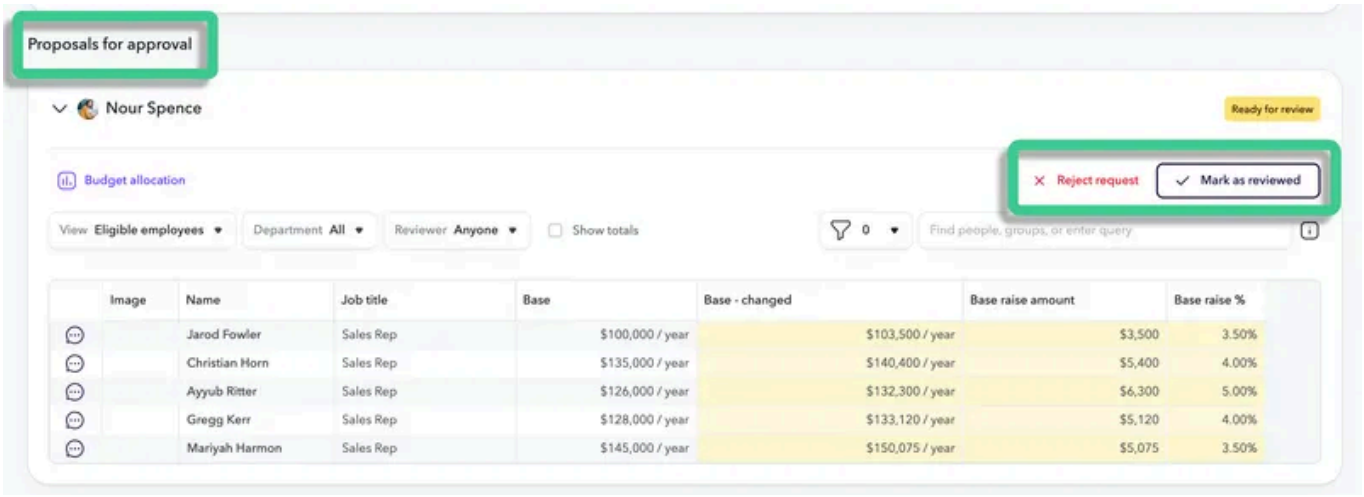
1. Select the **Changes & approvals** tab in the compensation review.
2. Navigate to the **My proposed changes** section.
    - All eligible employees whose compensation you're responsible for reviewing display in this section.
3. Edit compensation and propose changes accordingly. **Learn more.**
    - Your changes are saved automatically.

Review proposals submitted to you

To review proposals that are directly submitted to you, or that will be submitted to you, throughout the compensation review cycle:

1. Select the **Changes & approvals** tab in the compensation review.
2. Navigate to the **Proposals for approval** section. This is where you can find all the proposals submitted to you for approval.
    - Proposals display in a collapsed state by default.
    - The name of the reviewer associated with the proposal displays as a heading for each proposal.
    - The status of the proposal displays on the right. The following statuses can display:
        - **Awaiting submission** - Indicates that the proposal has not been submitted yet by the reviewer.
        - **Ready for review** - Indicates that the proposal has been submitted and is ready for your review.
        - **Reviewed** - Indicates that you or the reviewer have marked the proposal as reviewed and approved but have not submitted it yet.
        - **Rejected** - Indicates that the proposal has been rejected and returned to the original reviewer for re-submission.
        - **Submitted** - Indicates that the reviewer has reviewed and approved the proposal and submitted all components of the compensation review that they're responsible for.

3. Expand the proposal you want to review.
4. Review the proposed compensation changes.



View a full team overview

To view a full overview of all employees eligible in the compensation review, you can select the **Full team overview** tab.

This tab displays all eligible employees whose compensation you have access to view.

The Budget allocations and Raise percentage visualizations reflect the compensation changes for all employees in the Full team overview list. You can use the dropdowns to filter the employees that display in the list. The visualizations update based on the filters you apply.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.6.2.1. Reject a submitted proposal

When you don’t agree with a proposed compensation change or want to return the compensation review to the original reviewer for more information, you can reject a submitted proposal.

To reject a submitted compensation proposal:

1. Select the **Changes & approvals** tab in the compensation review.
2. In the **Proposals for approval** section, select and review a proposal with a status of **Ready for review**.
3. Select **Reject request** for the selected proposal. The **Reject request** dialog displays.
4. Enter a reason for rejecting the proposal.
5. Select **Submit**.
    - The proposal status changes to **Awaiting submission** and it is sent back to the original requester. ChartHop notifies the reviewer who originally submitted the proposal that it was rejected and allows them to return to the compensation review and adjust their proposal.

As an approver, you also have the ability to enter employee-specific comments or overall comments in the Comments field to explain why you rejected the proposal and to suggest changes. Your comments are kept confidential and only the reviewers and approvers in your review structure have access to viewing and responding.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.6.6.2.2. Approve and submit proposals

You can approve a proposal when you approve of the proposed compensation changes without any additional edits or when you've collaborated with your reviewers to resolve a previously rejected request.

Approve a submitted proposal

To approve a submitted compensation proposal:

1. Select the **Changes & approvals** tab in the compensation review.
2. In the **Proposals for approval** section, select and review a proposal with a status of **Ready for review**.
3. Select **Mark as reviewed**.
    - This indicates you've reviewed the proposal and approve the proposed compensation changes without any additional changes.
    - The status of the proposal changes to **Reviewed**.
    - The reviewer workbook table changes to a view-only mode. To make changes, you must click **Edit**.

> Marking a proposal as reviewed does not complete the approval process. After you mark a proposal as reviewed, you must then submit the approval to move forward.
>
> You can't submit an approval until you've marked all proposals submitted to you as reviewed.

Submit all requests and approvals

Once you're finished reviewing compensation, proposing changes, and reviewing and approving all proposals submitted to you, you must submit all your proposed changes and approvals to move them forward in the compensation review process.

After you submit your proposals and approvals, you cannot make any more edits and your reviewer workbook table displays in view-only mode.

You are able to enter additional comments and view whatever changes and comments your manager (or next level reviewer) makes during their review of your proposal.

To submit all your proposals and approvals:

1. Make sure all proposals that you are responsible for have the status of **Reviewed**.
    - This includes both changes that you have proposed or proposals that have been submitted to you that you've reviewed and approved.
2. Select **Submit all** in the compensation review header.
    - The **Submit all** button is available only when all proposals have been reviewed.
3. Select **Submit**.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.6.6.3. Working as a collaborator in a compensation review

> This feature is currently in alpha release. For more information about having this feature enabled for your organization, please contact ChartHop.

Collaborators are people who work alongside reviewers and approvers to guide them throughout the compensation review cycle. As a collaborator, you perform an important role in a compensation review cycle because you help promote transparency and equity in the compensation changes that are proposed.

When you've been assigned to work as a collaborator with a group of reviewers and approvers, you can see all the information that they have access to and have entered in their compensation review proposals.

Depending on the permissions given to you in the review cycle, you may only be able to view the compensation review proposals for the reviewers and approvers you're working with. In some cases, you may be able to make changes or even submit on behalf of the reviewers and approvers you're collaborating with. Please reach out to your compensation review cycle owner with any additional questions about working as a collaborator at your organization.

Access compensation reviews as a collaborator

When you're added to a compensation review cycle as a reviewer, approver, or collaborator, you'll receive an email invitation asking you to join the compensation review in ChartHop.

To access a compensation review to which you've been invited:

1. From the left sidebar, select **Comp Reviews.**
2. Select the name of the compensation review.

Once you access the compensation review, you'll see three main tabs:

- **Cycle overview**
- **Changes & approvals**

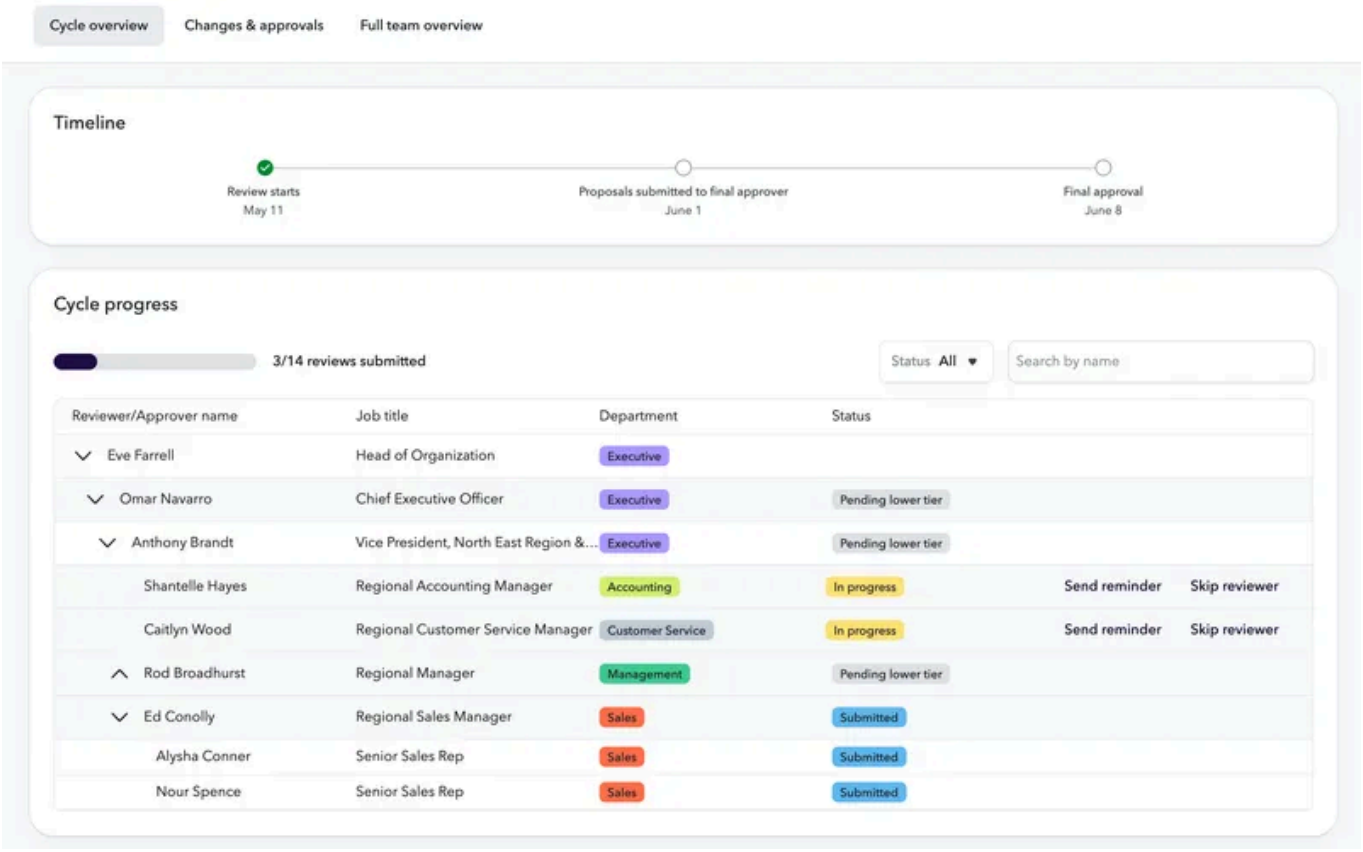
- **Full team overview**

5.6.6.3.1. View who you're collaborating with

You can use the **Cycle overview** tab to view a list of all the reviewers and approvers you're collaborating with, as well as any approvals below and above in the reporting structure, and the current status of each compensation review proposal.

Compensation review proposals can display in the Cycle overview with the following statuses:

- **In progress** - Indicates the reviewer or approver is currently reviewing.
- **Pending lower tier** - Indicates the approver is waiting on submission from a reviewer that is below them in the compensation review reporting structure.
- **Submitted** - Indicates the review has been submitted.
- **Skipped** - Indicates the review has been skipped (either manually or automatically).



Send a reminder to the reviewer or approver you're collaborating with

As a collaborator, you can send a friendly reminder to reviewers and approvers.

To send a reminder:

1. Access the compensation review you're participating in.
2. Navigate to the **Cycle overview** tab.
3. In the **Cycle progress** section, identify the reviewer or approver you want to remind.
4. Select **Send reminder**. ChartHop sends an email reminder to the reviewer or approver.

Skip a reviewer or approver

In cases where a reviewer or approver is not available and has not completed their review, you can manually skip and advance proposals to the next reviewer in the reporting structure using the **Skip reviewer** option in the Cycle overview list.

When you select **Skip reviewer** for any reviews that are in progress, the original reviewer is notified that their review was skipped. The proposal becomes read-only for the skipped reviewer; however, any changes that were made prior to the skip are maintained and forwarded to the next reviewer.

> As a collaborator, you must have Edit & Submit permissions to be able to skip a reviewer or approver and you can only skip reviewers you're collaborating with. For more information, please contact your compensation review cycle owner.

View a full team overview

To view a full overview of all employees eligible in the compensation review, you can select the **Full team overview** tab.

This tab displays all eligible employees whose compensation you have access to view.

The Budget allocations and Raise percentage visualizations reflect the compensation changes for all employees in the Full team overview list. You can use the dropdowns to filter the employees that display in the list. The visualizations update based on the filters you apply.

Cycle overview | Changes & approvals | Full team overview

Visualizations

Budget allocations

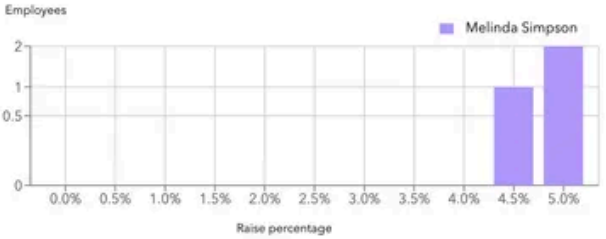
Currency

Allocated amounts



Total allocated $81.00k

Raise percentage



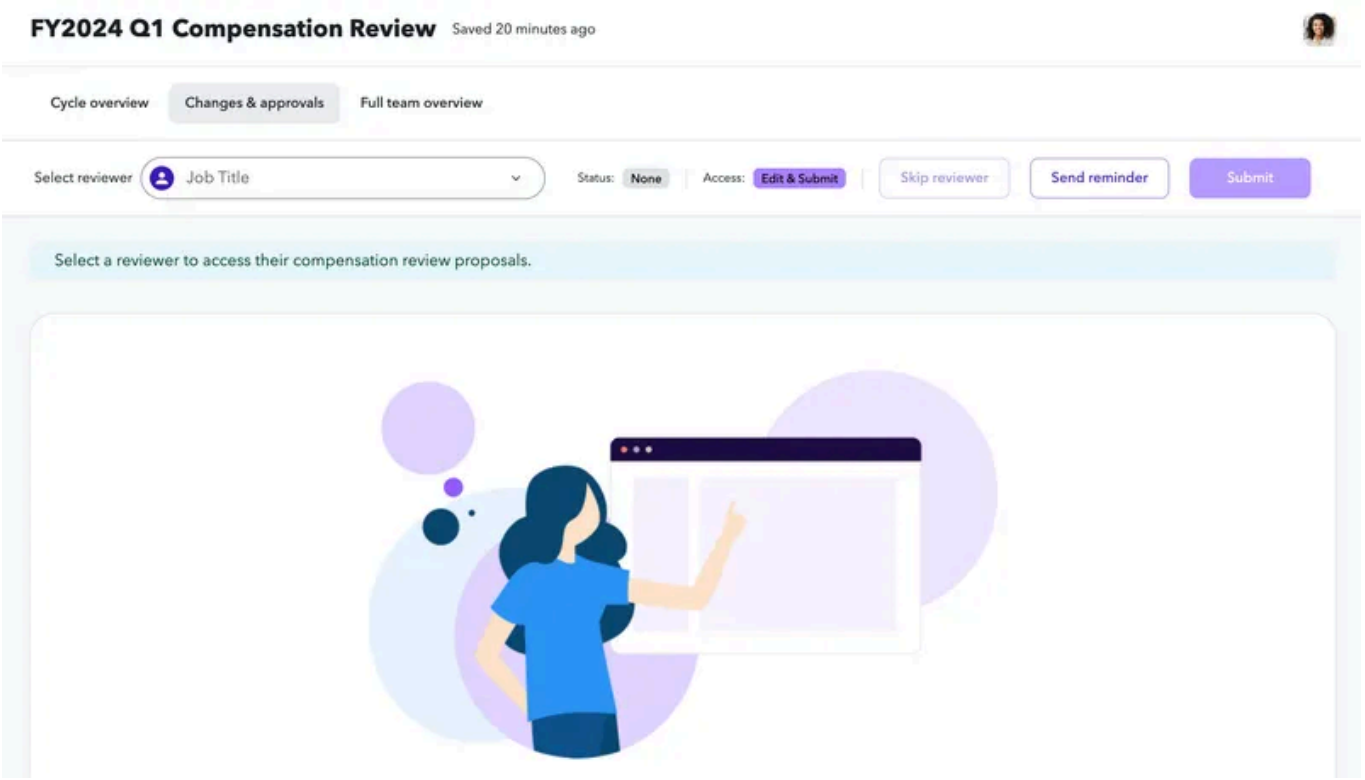
View **Eligible employees** | Department **All** | Reviewer **Anyone** | Show totals | 0 | Find people, groups, or enter query

	Image	Name	Job title	Base	Base - changed
		Rod Broadhurst	Regional Manager	$200,000 / year	
		Anthony Brandt	Vice President, North East ...	$195,000 / year	
		Caitlyn Wood	Regional Customer Service...	$130,000 / year	
		Ed Conolly	Regional Sales Manager	$150,000 / year	
		Jarod Fowler	Sales Rep	$100,000 / year	$104,000 / year

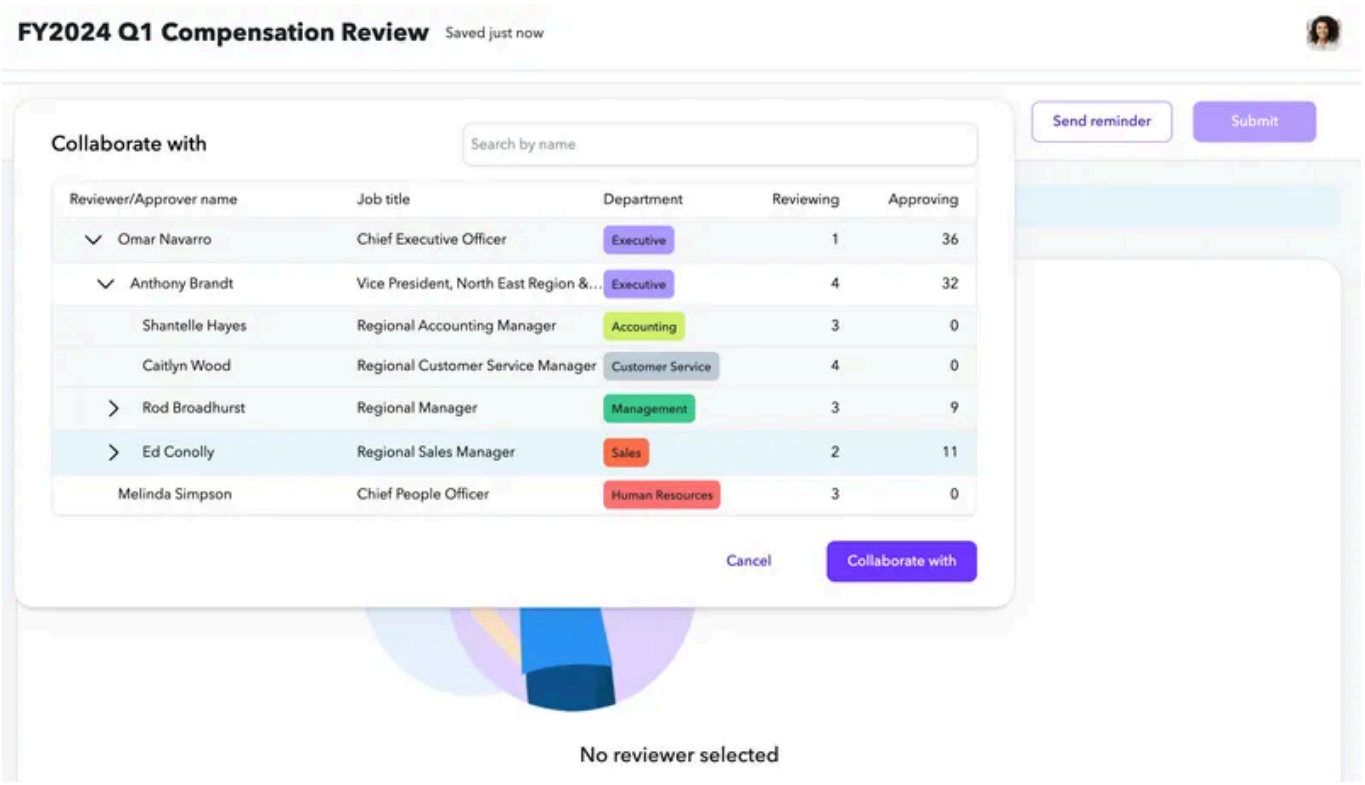
5.6.6.3.2. Select a reviewer or approver to collaborate with

As a collaborator, you can review compensation review proposals for the reviewers and approvers you're collaborating with on the **Changes & approvals** tab.

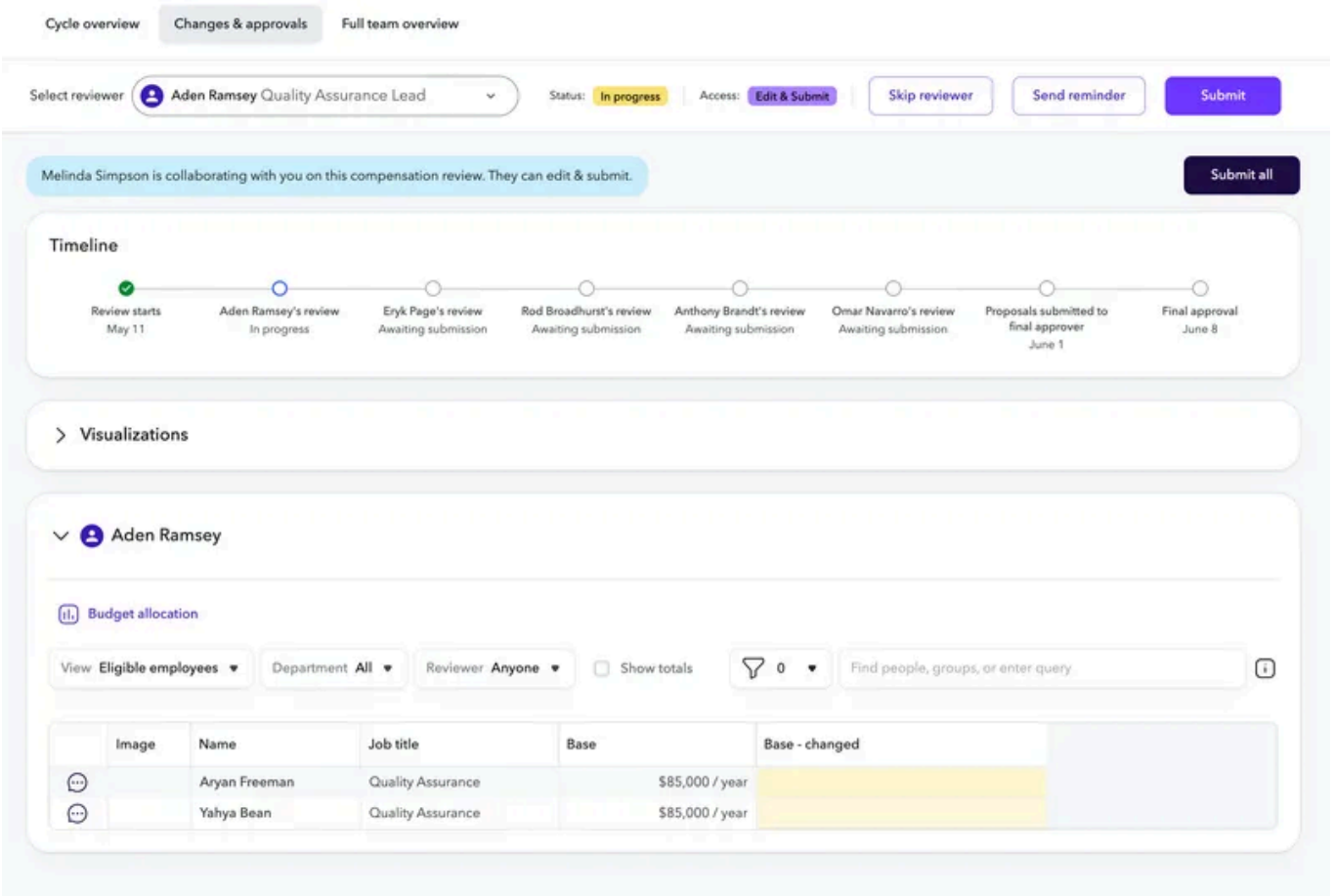
From the tab header, you can select a reviewer to collaborate with, view the status of the selected compensation review proposal, and view the level of access you have to that proposal. Depending on the permissions given to you by your organization, you may also be able to skip the currently selected reviewer or approver, send reminders, and even submit the proposal on the reviewer or approver's behalf.



You can select a reviewer or approver to collaborate with from the **Select reviewer** dropdown. All the reviewers and approvers you've been assigned to collaborate with are available from the dropdown. You can enter a name to search for a specific reviewer or approver.



Once you've selected a reviewer or approver, select **Collaborate with** to view their compensation review proposal.



The proposal displays the same information that the reviewer sees. You can view the current status of the proposal and see any changes they've entered, as well as review compensation. **Learn more.**

In some cases, depending on how your organization has configured the compensation review, you can even make changes to the proposal and select **Submit** to submit the proposal on their behalf.

Complete your own compensation review proposal as a collaborator

When you're a collaborator and also a reviewer or approver in the compensation review cycle, you can complete your own compensation review proposal by selecting yourself in the **Select reviewer** dropdown.

Once you're done reviewing and entering your proposed compensation changes, you can select **Submit all** to submit your proposal.

Cycle overview | Changes & approvals | Full team overview

Select reviewer: Melinda Simpson Chief People Officer

Status: In progress

Submit

Submit all

Timeline

- Review starts — May 11
- Melinda Simpson's review — In progress
- Proposals submitted to final approver — June 1
- Final approval — June 8

Visualizations

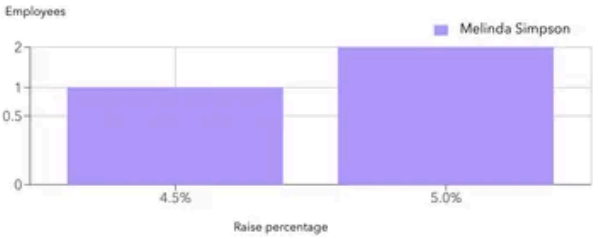
Budget allocations

Currency

Allocated amounts

Total allocated $14.00k

Raise percentage



Melinda Simpson

Budget allocation

View: Eligible employees | Department: All | Reviewer: Anyone | Show totals | 0 | Find people, groups, or enter query

Image	Name	Job title	Base	Base - changed
	Ibrahim Andrews	Human Resources	$100,000 / year	$105,000 / year
	Findlay Clark	Human Resources	$100,000 / year	$105,000 / year
	Petra Kinney	People Ops Manager	$88,000 / year	$92,000 / year

5.6.6.4. Final approving a compensation review

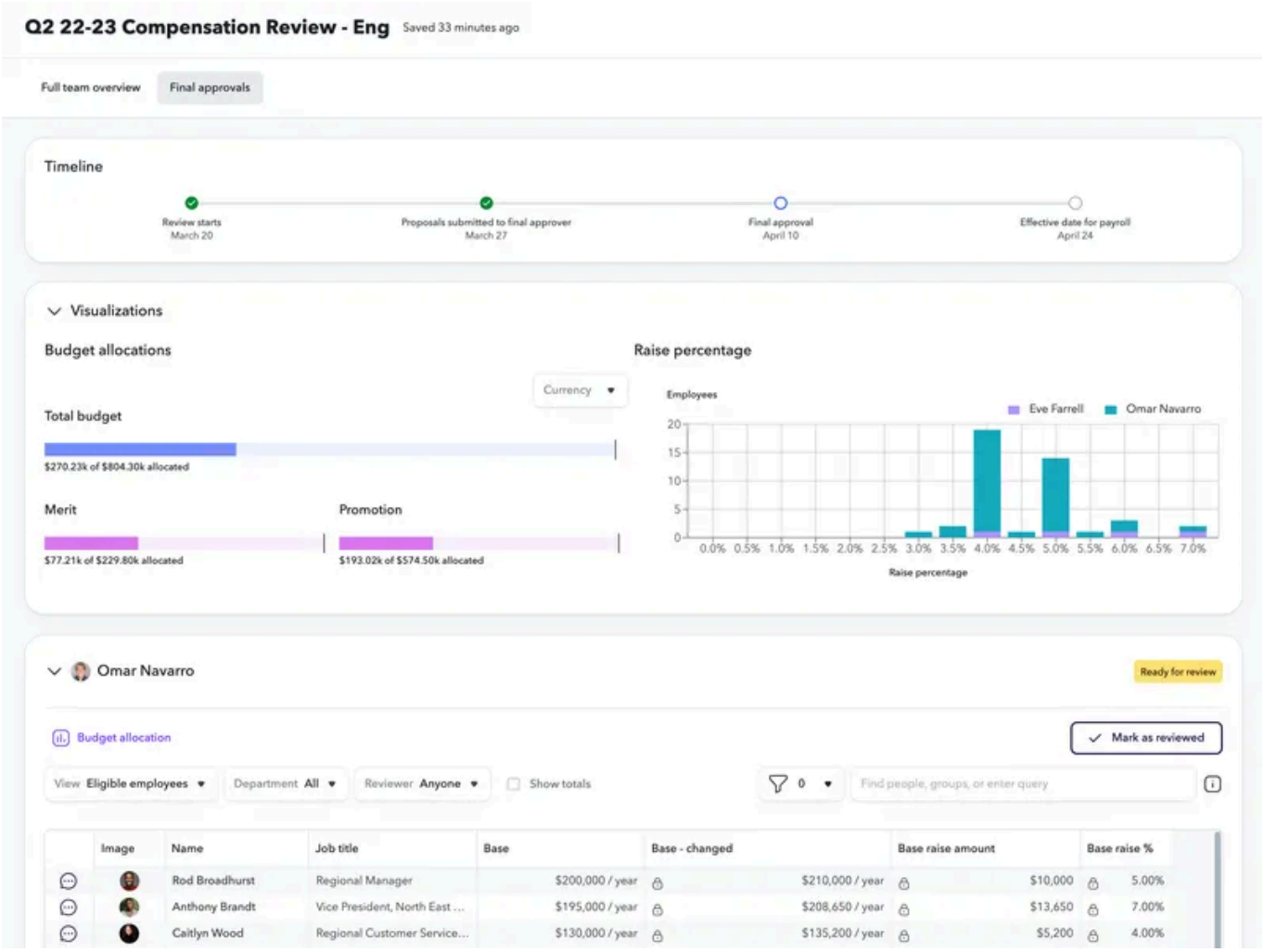
Final approvers are the final step in the compensation review cycle. While the compensation review cycle is in progress, you don’t have access to reviews and approvals until the deadline when all reviews are due.

Once you reach that key date in the timeline, you have the ability to join the compensation review and review all submitted compensation proposals.

As a final approver, you can review:

- The results of the total overall budget allocation using the Budget overview and Raise percentage charts and make adjustments as necessary.
- Employee exceptions to the established compensation guidelines to ensure compensation is being distributed equitably and transparently.
- Comments included with all submitted proposals to see the collaborative process of your reviewers and approvers and how decisions were made.

After you’re done with your final review, the compensation review owner can conclude the compensation review.



Final approvals

Review proposals as a final approver

To review proposals submitted to you throughout the compensation review cycle:

1. Select the **Final approvals** tab in the compensation review.
2. All proposals submitted to you display in a list underneath the Budget overview.
    - Proposals display in a collapsed state by default.
    - The name of the reviewer associated with the proposal displays as a heading for each proposal.
    - The status of the proposal displays on the right. The following statuses can display:
        - **Ready for review** - Indicates that the proposal has been submitted and is ready for your review.
        - **Reviewed** - Indicates that you or another Final approver have marked the proposal as reviewed and approved but have not submitted it yet.

3. Expand the proposal you want to review.
4. Review the proposed compensation changes. You can use the following tools to help you with your review:
    - Budget overview and Raise percentage charts - **Learn more.**
    - Full team overview - **Learn more.**
    - Budget allocation - see below.
5. Once you have reviewed the proposals, you can mark the proposal as reviewed - **Learn more.**

After you and any other final approvers have completed your final review, the compensation review owner can go ahead and mark the compensation review cycle as concluded with your approval.

View budget allocation for a specific proposal

To view the budget allocations for a specific proposal:

1. Select the **Final approvals** tab in the compensation review.
2. Expand the proposal whose budget allocation you want to review.
3. Select the **Budget allocation** link for the proposal. A **Budget allocations** panel displays a breakdown of the budget allocations for that proposal.

View final approvals as a CEO or head of organization

CEOs or heads of organization have the same view of the compensation review as the final approver. They can view all changes on the Final Approvals tab.

Once reviews are submitted and reach the CEO/head of organization level, both CEOs and final approvers have the ability to make edits and mark proposals as reviewed on a shared Final approvals tab.

> Proposals can only be marked as reviewed; they cannot be rejected at the final approval stage.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.6.6.5. Compensation reviews reviewer and approver FAQs

This topic answers frequently asked questions about participating in a compensation review in ChartHop.

I've been invited to a compensation review - how do I access it?

You can access any compensation reviews to which you've been invited in any of the following ways:

- Selecting **Comp** from the left sidebar
- Selecting **More** from the left sidebar and then selecting **Compensation reviews**
- Clicking the link from your email invitation
- Selecting the Tasks from your ChartHop home page

What happens if I submit a compensation review proposal for approval and the approver makes a change to my compensation review proposal?

After you submit your proposed changes, you still have the ability to access your compensation review in view-only mode, allowing you to view any changes made throughout the approval process.

Do I have to follow the established guidelines? What happens if I exceed the guideline targets?

You have the ability to make exceptions for the changes you propose. Changes that exceed the established guidelines may be flagged for exceeding a predefined threshold. However, going over the guideline won't prevent you from submitting your proposal for approval. **Learn more.**

What happens if an approver rejects my proposed changes?

When your approver rejects your compensation review, it is returned back to you with comments and feedback. You have the ability to make changes based on that feedback and re-submit it for approval. **Learn more.**

How can I see where my compensation review proposal is in the approval process?

You can view the compensation review timeline and the status of your compensation review proposal by accessing the compensation review and viewing the **Timeline** section of your review. **Learn more.**

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.7. Performance reviews

You can create and implement performance review cycles directly within ChartHop.

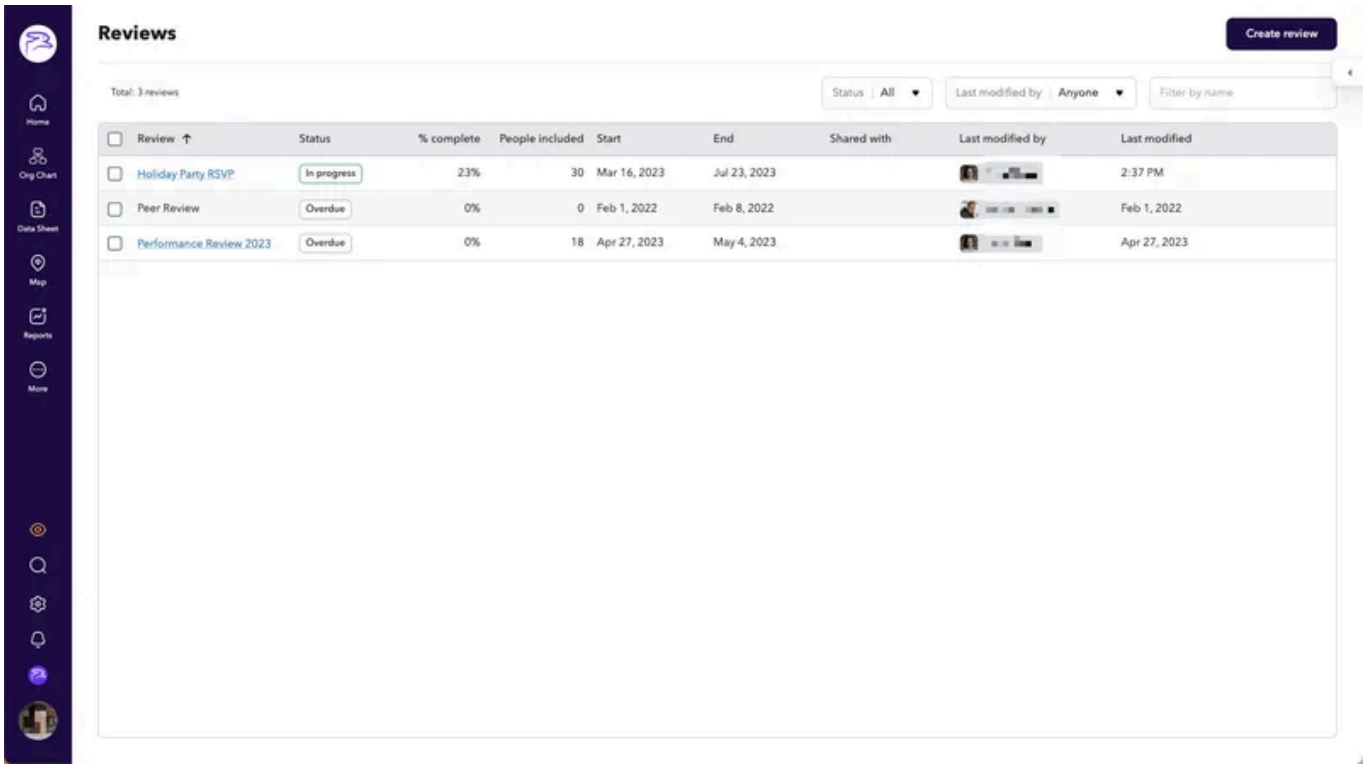
These review cycles can be customized to fit multiple styles of reviews (for example, 360 reviews, upward/downward reviews, 9-box reviews, and more). You can also use ChartHop reviews to track employee engagement and overall employee satisfaction.

You can set up these reviews for a specific group of employees or everyone in your organization. All review aspects, including sending and tracking forms, sending reminders, viewing completion, and analyzing data, can be accomplished within one centralized location.

> Before you can create a review, custom forms must have been set up in ChartHop by users with Owner or Technical owner access. **Learn more.**

Access reviews

You can view existing and create new reviews from the Reviews page.



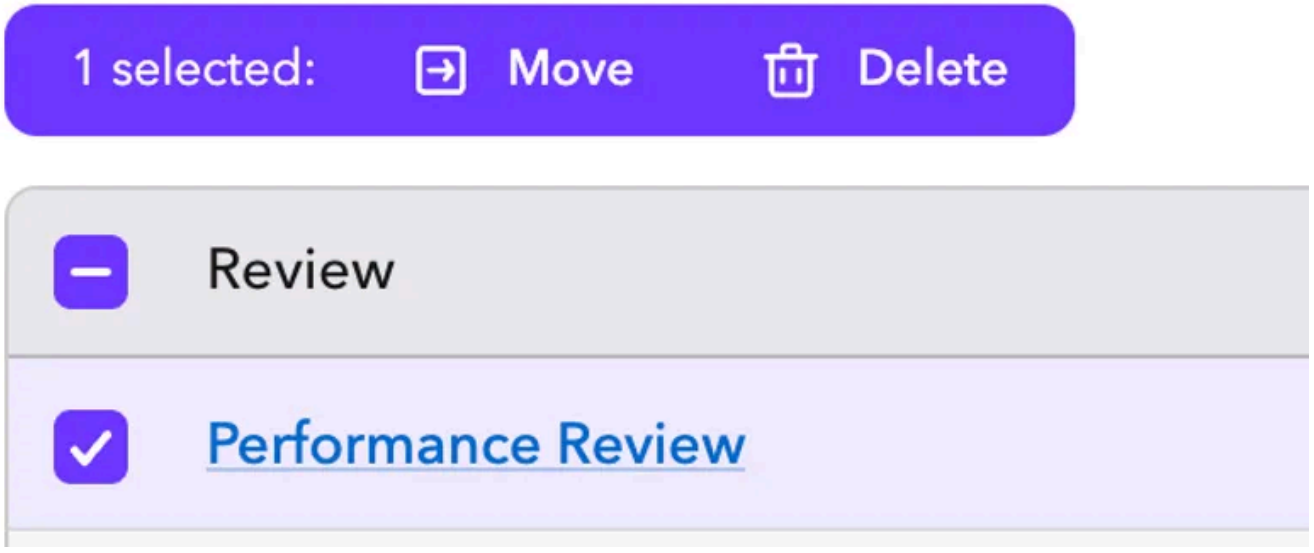
1. From the left sidebar, select **Performance.**

2. A list of all **reviews** and their current status displays.
3. Refine the list in the following ways.
    - Use the Status drop-down list to choose to view only reviews of a certain status.
    - Use the Last modified by drop-down list to view reviews last modified by a particular person.
    - Filter the list by the name of the person who created the review.

Move a review to a survey

ChartHop separated Reviews into Performance Reviews and Engagement Surveys. You can move items between the Reviews and Surveys by doing the following:

1. From the left sidebar, select **Performance.**
2. Select the reviews that you would like to move
3. Select **Move** from the actions list
4. Confirm the move in the dialog



Modules: HRIS | Engagement | Goals | **Performance** | Compensation Reviews | Headcount Planning

5.7.1. Create a review

Users with the Owner, Technical owner, Sensitive data viewer, and Compensation viewer roles can create reviews. However, the sensitivity of the data displayed in the review itself for participants and reviewers is controlled by the form and fields used in the review. Only users with the Owner and Technical owner roles can create forms. **Learn more.**

To create a new review:

1. From the left sidebar, select **Performance.**
2. Select **Create review**. The **Create Review** dialog displays.
3. In the **Create Review** dialog, enter information for the following fields:
    - **Name** - Enter the name of the review cycle.
    - **Start date** - Select the start date for the review cycle.
    - **End date** - Select the end date for the review cycle.
    - **People to include** - Filter the people included in the review (for example, dept: sales). You can add a filter when this review applies only to a specific category of employees.
    - **Description** - Enter a description for the review cycle.
4. Select **Save** to save your changes. Your review displays in the Reviews list as **in progress**.

5.7.2. Adding forms to a review

Once you've created a review, you can select it from the **Performance Reviews** list.

When you first open your review, it won't have any fields or tasks associated with it. You must first add a form to the review.

> Forms are made up of built-in and custom ChartHop fields used by your organization to capture and store data. You can use these fields to create performance review-specific forms to use in the review. **Learn more.**

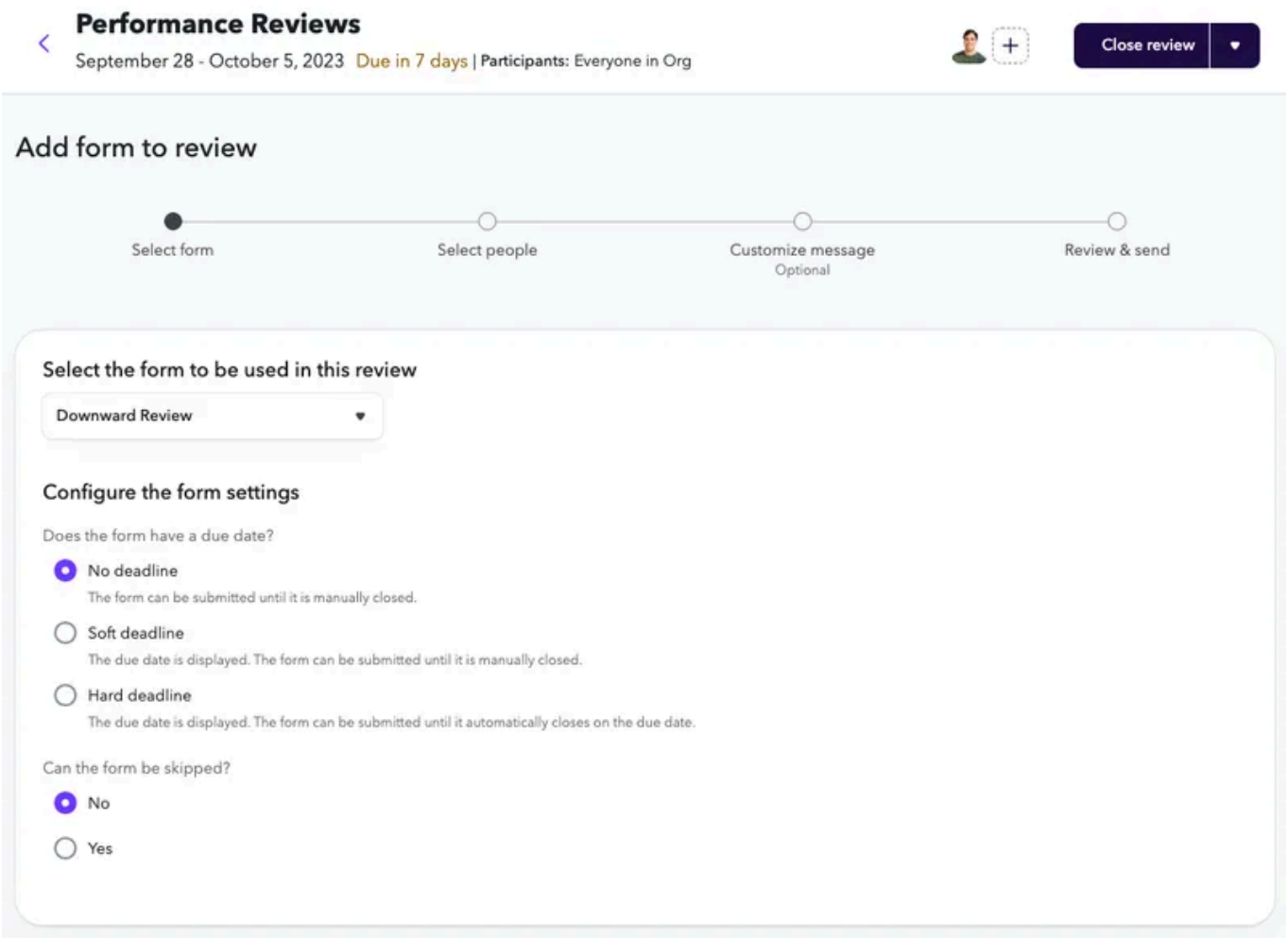
You can add multiple forms to each review. For example, you can add a downward review form with respondents set specifically for Managers and an upward or peer review form with respondents set for all employees within a single performance review. When you add a form, you have the ability to specify the group of employees who will receive that form based on their role.

Adding a form to a review involves the following steps:

1. Selecting a form for your review
2. Adding people to your review
3. Customizing the notification message for your review
4. Reviewing and sending out the form to your reviewers

5.7.2.1. Select a form for the review

Before you can create a review, create the form that you want to send out as part of that review. **Learn more about how to create forms.**

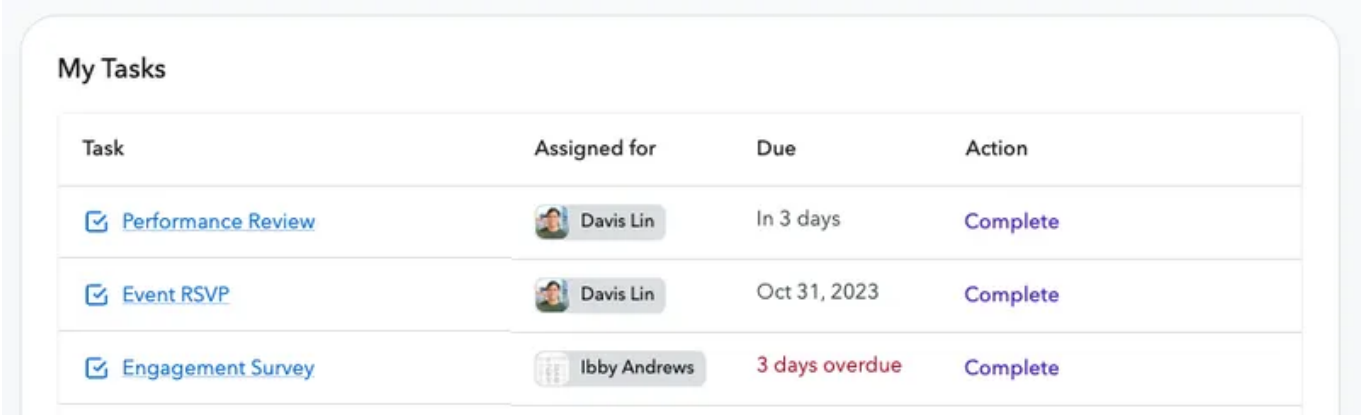


To select a form to use in the review:

1. From the left sidebar, select **Performance.**
2. Select your review by selecting the name of the review in the list.
3. From the **Forms** tab, select **Add form**.
4. **Select the form** to be used in the review from the dropdown list.
    - Any form can be selected, but the setting of the form will determine who the form can be sent to
5. Choose an option for **Does the form have a Due Date?**
    - **No deadline**

- **Soft deadline** → The form will display a due date.
- **Hard deadline** → The form will display a due date and the tasks will automatically expire at the due time, will be removed from the home page and can no longer be completed.
    - **Select a Date & Time** that the form is due at. This time is aligned to your account's time zone.

6. Choose an option for **Can the form be skipped?**
    - **No** → Form is required and all review participants must complete it *(Recommended for most Reviews uses)*
    - **Yes** → The form is optional and the person has the choice to either complete the form or skip it.
7. Select **Next** to continue.



Example of tasks with due dates

Packages: Basic | **Standard*** | **Premium**

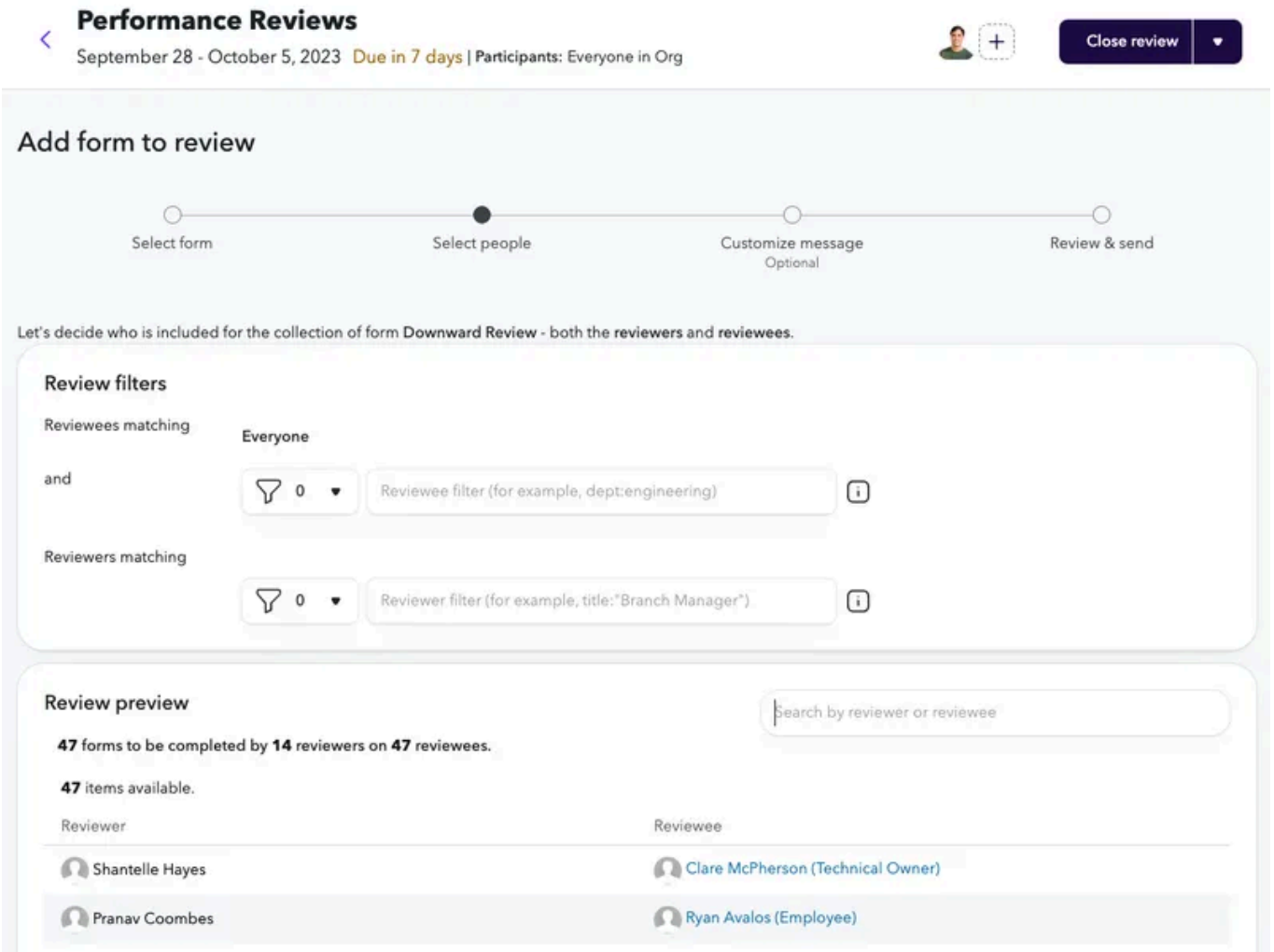
* Available as an add-on

5.7.2.2. Add people to a review

After you select a form, you must select the individuals who are included as reviewees and reviewers for that specific form.

The group of participants you established when you first created the review are included by default. You can apply filters or use Carrot queries to further narrow down the group of recipients.

The **Review preview** section displays a list of all the reviewers and reviewees who meet the criteria and are to be included in the review for that specific form.



> To participate in a review, employees must be members of your organization as well as active users in ChartHop. You cannot include an employee who is not a ChartHop user.

To select which people receive the form:

1. From the left sidebar, select **Performance.**
2. Select your review by selecting the name of the review in the list.
3. In the **Review filters** section, use the filters or define a Carrot query to filter the group of employees to be included as reviewees. For example, you can filter by department when you are using department-specific forms.
4. Use the filters or a Carrot query to filter the group of employees to be included as reviewers.
5. Select **Next** to continue.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

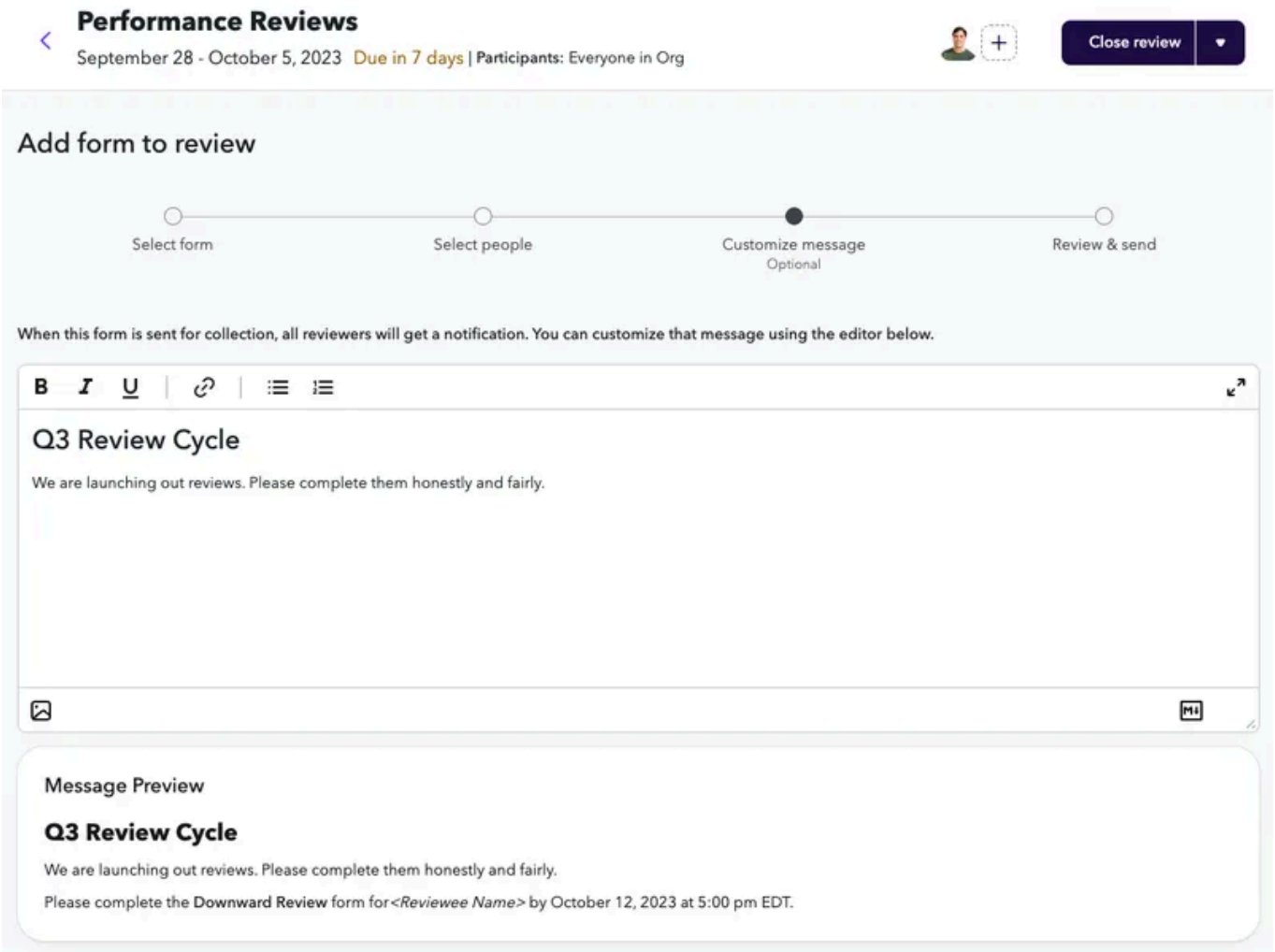
5.7.2.3. Customize the notification message

You can customize the notification that you send out to your reviewers when they receive the form you selected.

You can add additional instructions for your reviewers or remind respondents expectations for the review. Any due date you set will be included in the automatically generated part of the notification. This message displays to reviewers when they are invited to participate in the review.

> When you're integrated with Slack, ChartHop will notify the employees via Slack otherwise they will be notified via email. **Learn more.**

A preview of your message displays at the bottom of the page.



This is an optional step. Once you’re done customizing the message, select **Next** to continue.

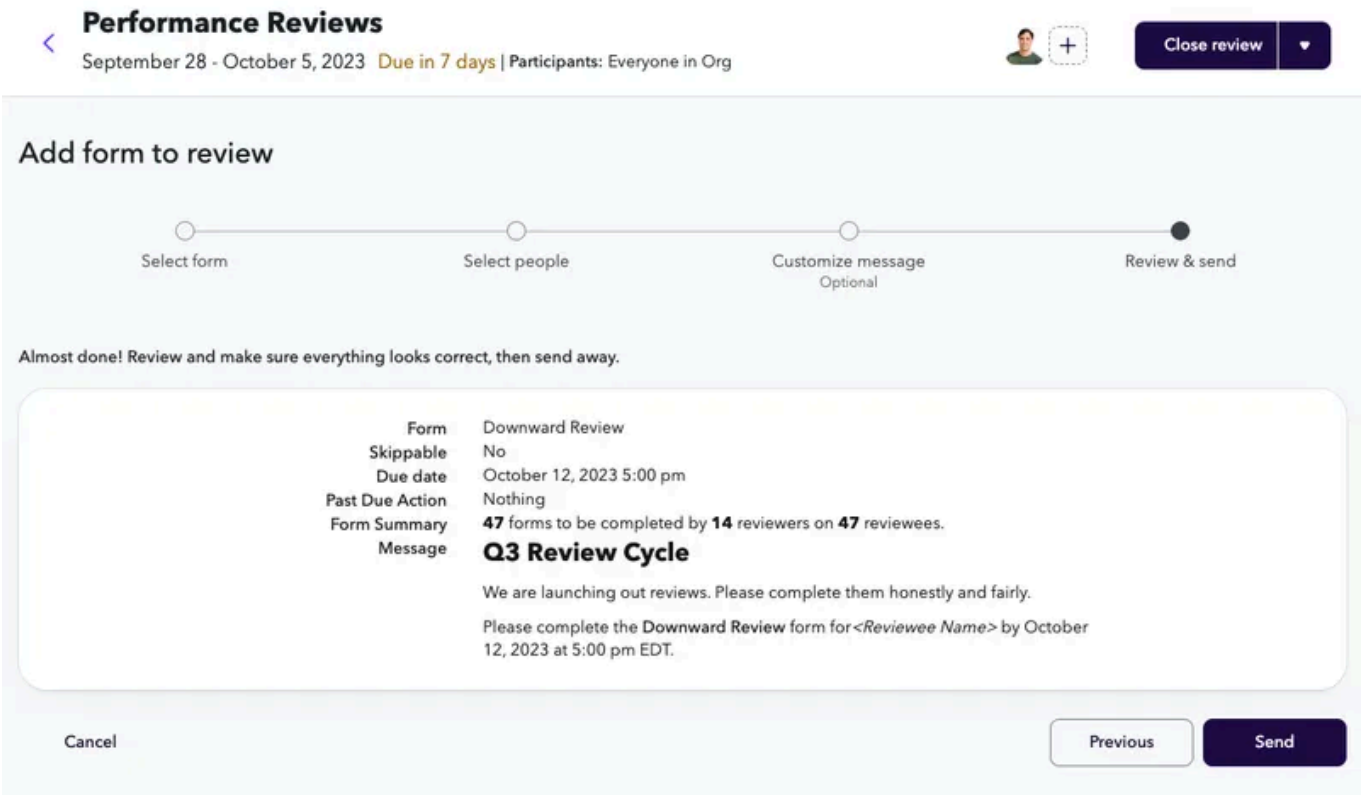
5.7.2.4. Review and send the form

You have the ability to review your form, settings, reviewers, and message before you send it out. Verify that the correct form is being sent out and that the number of employees included in the Form Summary matches the group of employees you want to include.

Click **Send** to send out the review form to the included group of reviewers and launch your review.

> When you're integrated with Slack, ChartHop will notify the employees via Slack otherwise they will be notified via email. Learn more.

After you send out a form, it displays in the **Forms** tab of your review. You can select **Add form** to repeat the process and add additional forms to the review.

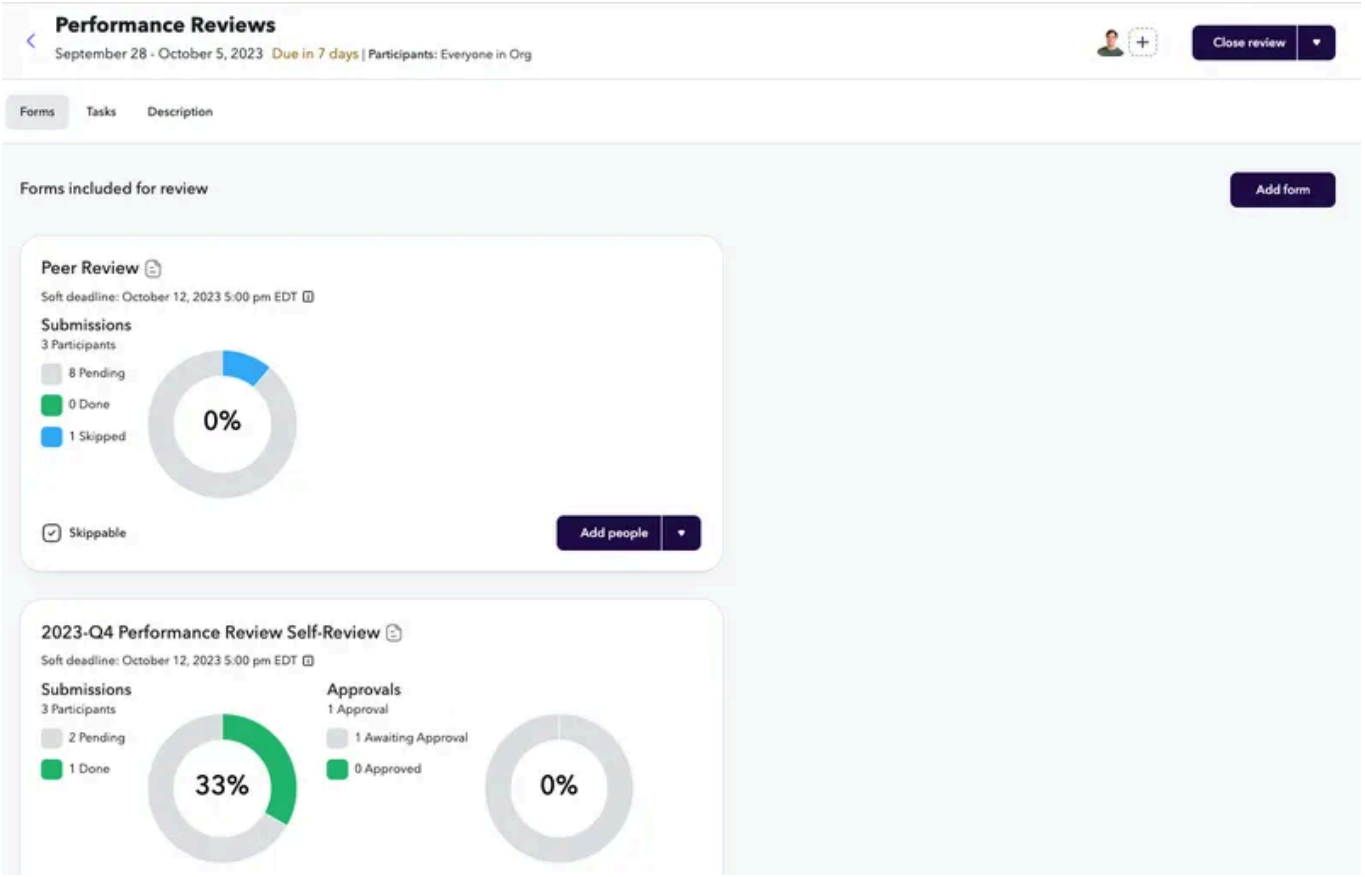


5.7.3. Managing forms in a review

The **Forms** tab displays all the forms you have sent out as part of your review cycle, including their current submission completion status.

You can select the page icon next to the form name to display a preview of the form that was sent out.

In addition, you can select **Add people** to add another group of people as recipients of that specific form. This is useful for cases where you have maybe omitted a group of people or changed directions in terms of who should be included. Learn more.



Send reminders for a specific form

You can send reminders to reviewers directly from the **Forms** tab to encourage your reviewers to submit their form.

To send a form-specific reminder:

1. In the **Forms** tab, navigate to the form whose recipients you want to remind.

2. In the **Add people ▼** dropdown menu, select **Send reminder**. The **Send reminder** dialog displays.
3. (Optional) In the **Send reminder** dialog, enter a reminder message.
4. Select **Send**. The reminder is sent to everyone included for that specific form who has not already completed their submission. Reminders are sent via email or Slack (when configured).

Close a form

Closing a form is like enforcing a deadline. It will expire all of the tasks, so that the people can no longer complete the form. removes the form from the review and clears all associated pending to-dos for individuals who have already received the form.

Forms that have been submitted and are awaiting approval will still be able to be approved after the form is closed.

To delete a form:

1. In the **Forms** tab, navigate to the form you want to delete.
2. In the **Add people ▼** dropdown menu, select **Close form**. The **Close form** dialog displays.
3. Select **Confirm**. The form will then be closed and the tasks expired.

Remove a form from the review

Deleting a form permanently removes the form from the review and clears all associated pending tasks for individuals who have already received the form.

Deleting the form only removes the form from the review - any data that has already been collected using the form is not deleted and the form remains active and available for use throughout ChartHop.

To delete a form:

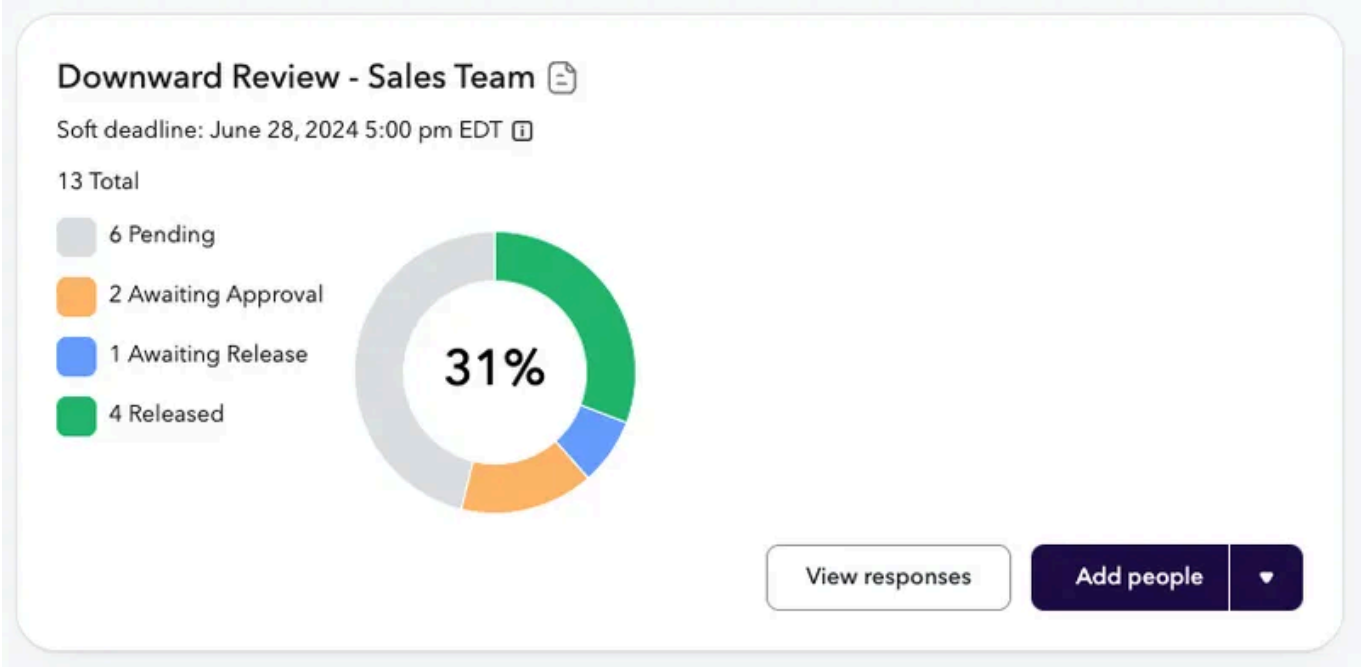
1. In the **Forms** tab, navigate to the form you want to delete.
2. In the **Add people ▼** dropdown menu, select **Remove form**. The **Remove form** dialog displays.
3. Enter **DELETE** to confirm.

4. Select **Delete**. The form is deleted from the review and removed from participant dashboards.

5.7.4. Monitoring participation in a review

Review Participation

To monitor the overall participation in a review, go to the **Forms** tab within the review. Each form will display the status of the indiviual forms and the overall completion percentage.



Participation statuses

Depending on the **configuration of your form**, your will see different statuses to reflect that various states of form completion or **Form responses workflows**. Here are the statuses:

Awaiting the next action:

- `Pending` - The form is awaiting initial submission.
- `Awaiting Approval` - The form has been submitted but not been reviewed or approved.
- `Awaiting Changes` - The form has been reviewed by the approver, and the approver has requested changes.
- `Awaiting Release` - The for has been submitted and if applicable approved but not yet released.

Completed statuses: These contribute to the completion percentage in the center of the graph.

- `Done` - The form has been submitted and that is the final step.
- `Approved` - The form has been approved and that is the final step.
- `Released` - The form has been released and that is the final step.
- `Skipped` - The form has been skipped and will not be completed.

End statuses:

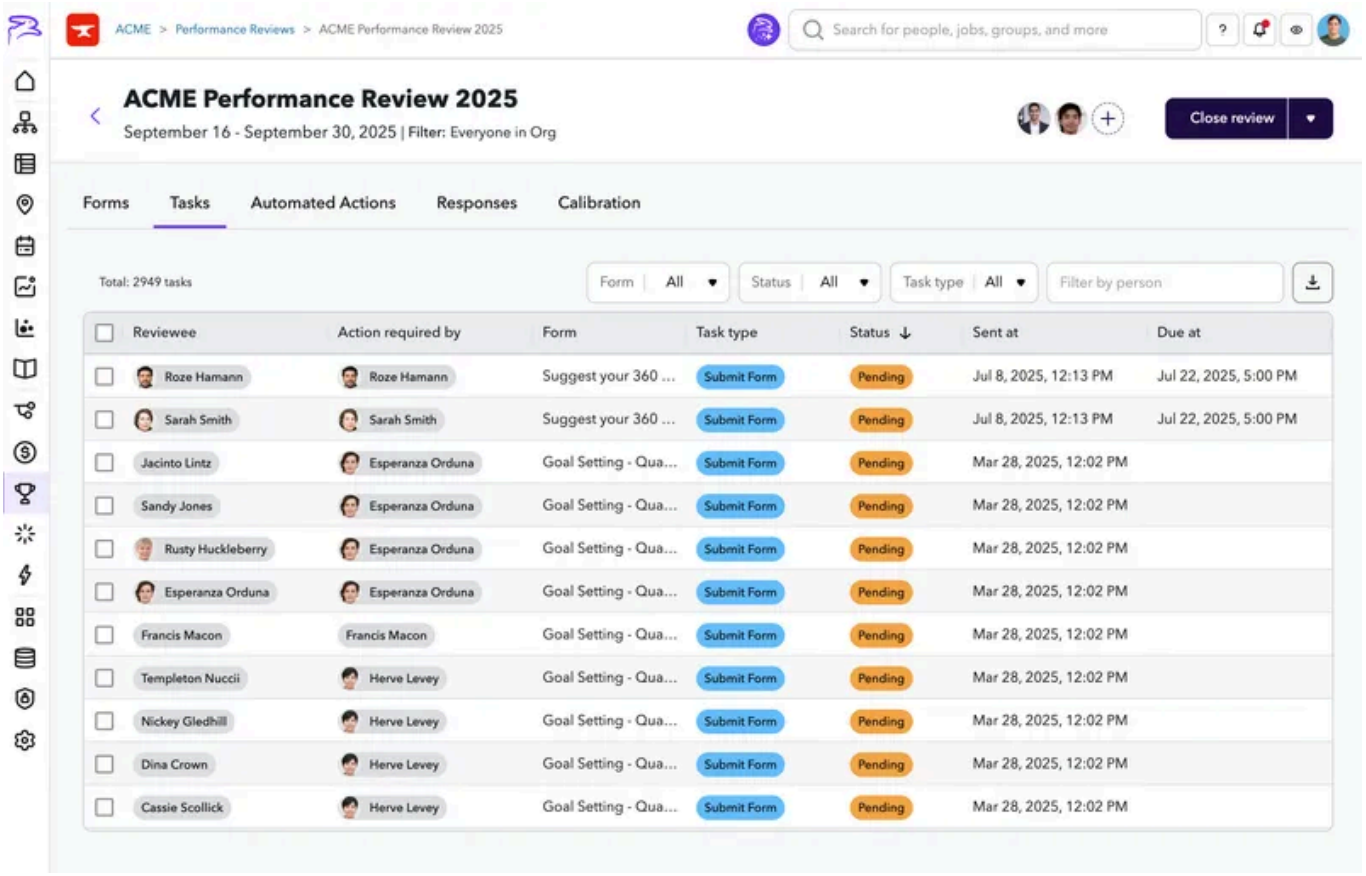
- `Expired` - The form has closed and these forms will not be completed.
- `Rejected` - The form response was rejected and will then be again awaiting approval.

Tasks Tab

On the **Tasks** tab, you can view a list of all the tasks that have been created as part of the Review.

All tasks associated with the review display on this tab, include form submission, approval and resubmission tasks.

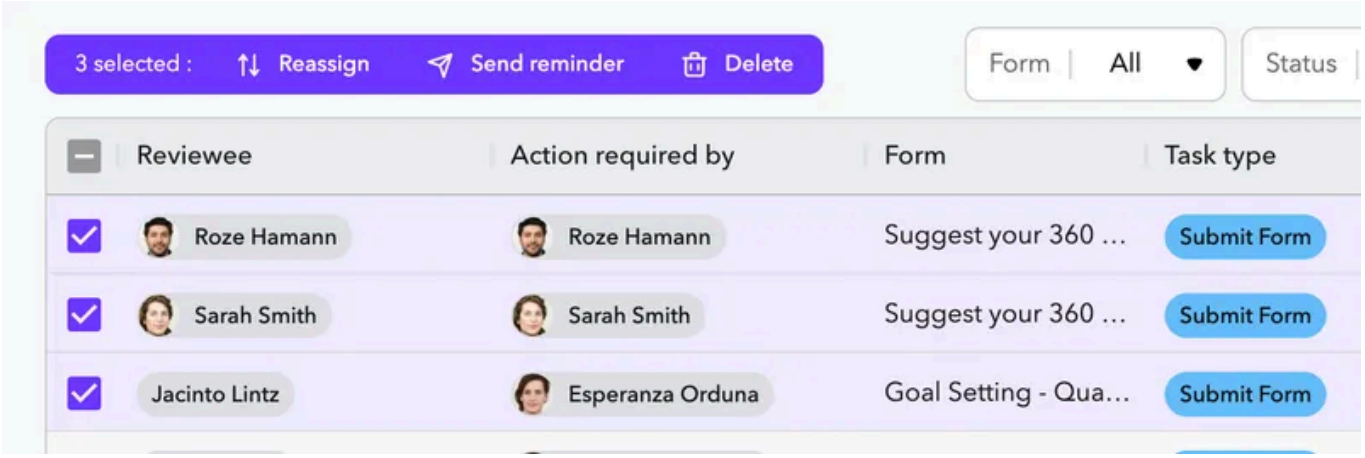
From the Tasks tab, you can see all reviewees, reviewers, the associated form, the task type, task status, sent date/time, due date/time and completion date/time.



You can filter the list by form, task type, status, by reviewer or by reviewee.

You can find an overview of all of the statuses within **Managing tasks**.

Select the checkbox next to a row to perform any of the following bulk actions:



Reassigning a task

You can reassign a `Pending` Submit Form task to another person, such as a new manager, if you need to.

To reassign a task:

1. In the **Tasks** tab, navigate to the task you want to reassign. Select the checkbox next to the task or tasks.
2. At the top of the table, click **Reassign**.
3. In the Reassign Tasks dialog, select the person to reassign the tasks to.
4. [Optional] Add a message that will be included in the email or chat message to them when they receive notification of the task assignment
5. Click reassign tasks. The person will them be notified of the task assignment.

Send a task reminder

You can send task reminders directly from the **Tasks** tab for Pending Tasks to encourage a reviewer to submit their form. This is helpful for when you want to send a reminder to a specific reviewer.

To send a task reminder:

1. In the **Tasks** tab, navigate to the task you want to send a reminder for. Select the checkbox next to the task or tasks.
2. At the top of the table, click **Send Reminder**.
3. In the Send Reminder dialog, optionally add a message that will be included in the email or chat message to them when they receive notification of the task assignment
4. Click send reminder. The person will them be re-notified of the task.

Delete a task

Deleting a task permanently removes the task from the review.

To delete a task:

1. In the **Tasks** tab, navigate to the task you want to delete. Select the checkbox next to the task or tasks.
2. At the top of the table, click **Delete** .
3. In the Delete confirmation dialog, type DELETE.
4. Click confirm. The tasks will then be deleted.

Export tasks

From the **Tasks** tab, you have the ability to export employee data as a spreadsheet.

To export tasks:

1. In the **Tasks** tab, click the download icon button (**Export CSV)**. The **Export CSV** dialog displays.
2. In the **Export type** dropdown, select an export type. You can select from the following:
    - **Pending Tasks Only** - Exports a list of pending tasks.
    - **All Tasks** - Exports a list of all tasks associated with the current review cycle.
3. (Optional) Select whether to include ChartHop IDs or former employees (if applicable) in the spreadsheet.
4. Select **Export**.
5. Once the export is complete, select **Download** to save the generated .csv file.

> **Modules:** HRIS | Engagement | Goals | **Performance** | Compensation Reviews | Headcount Planning

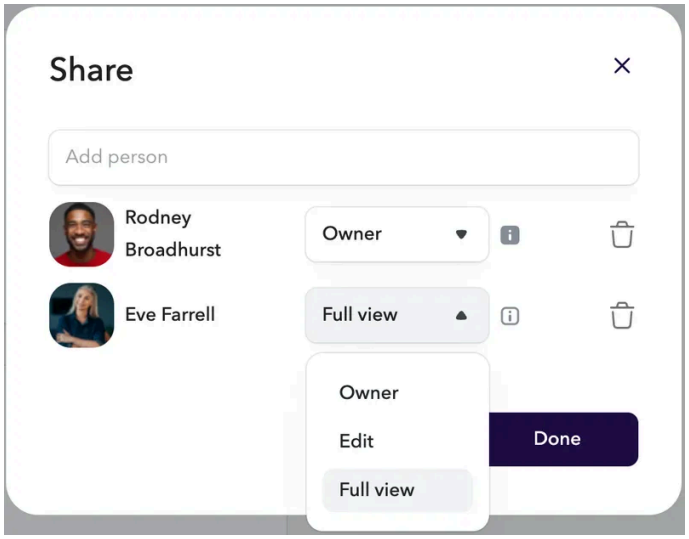
5.7.5. Collaborating in a review

You can share your review with your peers so that multiple people can edit the review and monitor its progress.

Review permissions

You can assign the following permissions to the people you're collaborating with:

- **Owner** - Indicates this person has full access to the review; they can view, edit, and share the review with others.
- **Edit** - Indicates this person can view and edit everything in the review.
- **Full view** - Indicates this person can view everything in the review, but cannot make edits.



Share a review

Share a review

To share a review with another person:

1. Access your review from the **Performance Reviews** page.
2. In the top right of your review, select the **+** icon next to your profile image to display the **Share** dialog.
3. In the **Add Person** field, search for the person you want to collaborate with in the review.

4. Use the dropdown to assign the level of permission this person has for the review. You can select from the following:
    - **Owner**
    - **Edit**
    - **Full view**
5. Select **Done**.

Your collaborators are notified that you have added them to the review. You can remove any collaborators from the review by selecting the trash can icon next to their names in the **Share** dialog.

5.7.6. Closing a review

You can close a review at any time - regardless of completion percentage.

To close a review cycle:

1. Select **Close review** in the top right corner.
2. Select **Confirm**.
    - Your review is marked as completed.
    - Any pending tasks are deleted and removed from reviewer dashboards.

Reactivate a review

You can select **Reactivate review** to open all of the previously expired tasks within a review.

> Once you reactivate a review, all pending tasks are moved back to pending and sent out to the appropriate reviewers.

> Once a review is past the end date you established when creating the review, an **Overdue** indicator displays when you access the review. However, this does not affect the review's status.

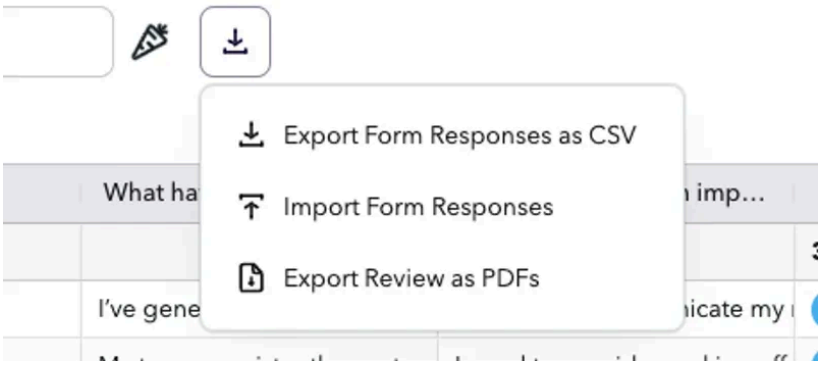
5.7.7. Export form responses in a review

You have the ability to export all submitted forms in a review as either a CSV or PDFs.

Exporting as a CSV

To export a CSV of a review:

1. Access your review.
2. In the **Responses** tab, select **Sheet**.
3. From the **Form** dropdown, select the Form from the review that you would like to export the responses for. Add any filters if you want only export a subset of the form responses.
4. Click the **Export** Icon Button. Then select, **Export as Form Responses as CSV**.
5. Select your data formatting options.
6. Click **Export CSV**.
7. Once the export is complete, select **Download Export** to save the .csv file.



Exporting as a PDF

When you export reviews in .pdf format:

- All forms form the review will be included in the PDF.
- All reviews are generated as separate .pdf files within a single .zip file.
- The files will use the naming convention of: `{{Review Name}} - {{First Name}} {{Last Name}}.pdf` For example: `ACME Q1 Performance Review - Sarah Smith` where Sarah Smith is who the forms in the review are About.

To export .pdf files for a review:

1. Access your review.
2. In the **Responses** tab, select **Sheet**.
3. Click the **Export** Icon Button. Then select, **Export Review as PDFs**.
4. (Optional) Add a filter the for the reviews you want to export.
5. Click **Export PDFs**.
6. Once the export is complete, select **Download Export** to save the .zip file.

Example PDF Export



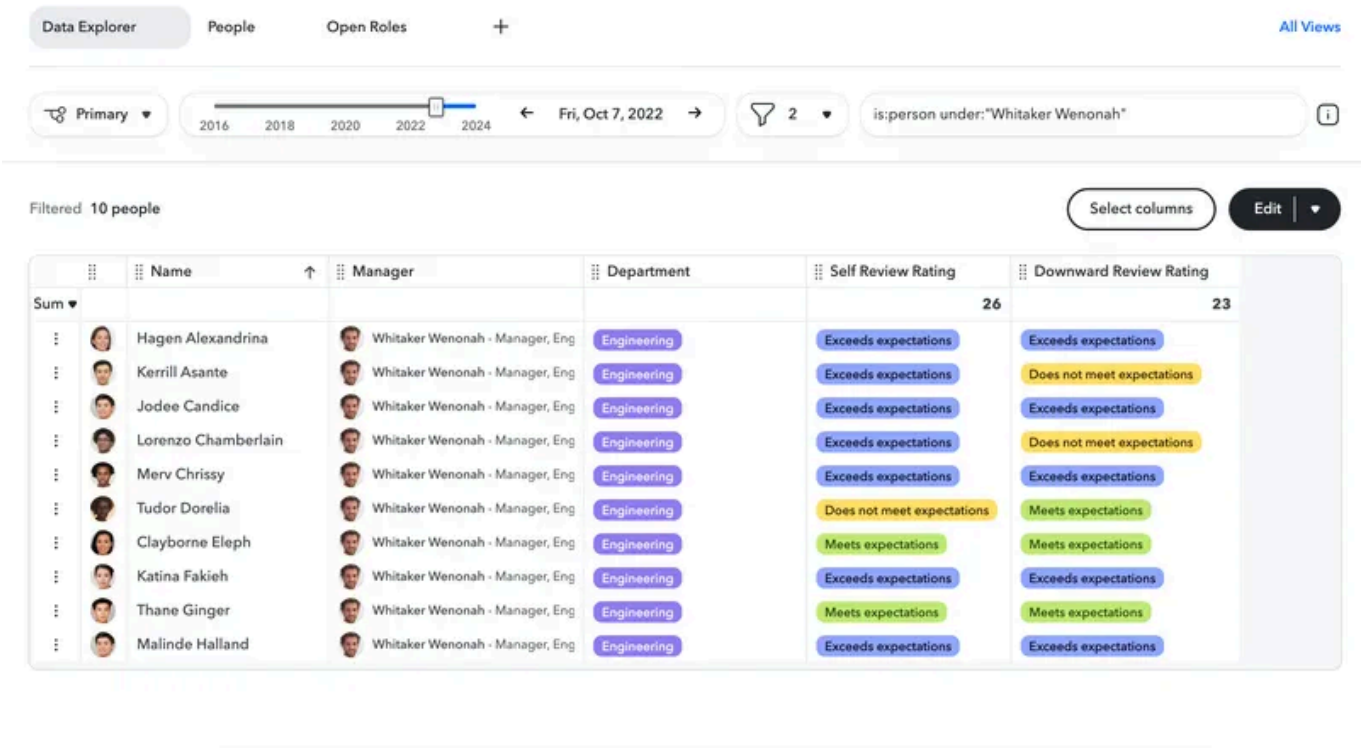
5.7.8. Viewing review data in ChartHop

You can view and analyze performance review data for your employees by configuring it to display on the **Data Sheet**. You can also view performance review data directly in the Employee profile.

View review data on the Data Sheet

After data has been collected for a review, you can view the collected data by adding the fields used in a performance review form as columns on the **Data Sheet**. This gives you the ability to view performance review ratings for a specific group of employees, including your direct reports.

You can add as many performance review fields as you want. For example, you can add both self-review ratings and downward review ratings to see how they compare for a group.



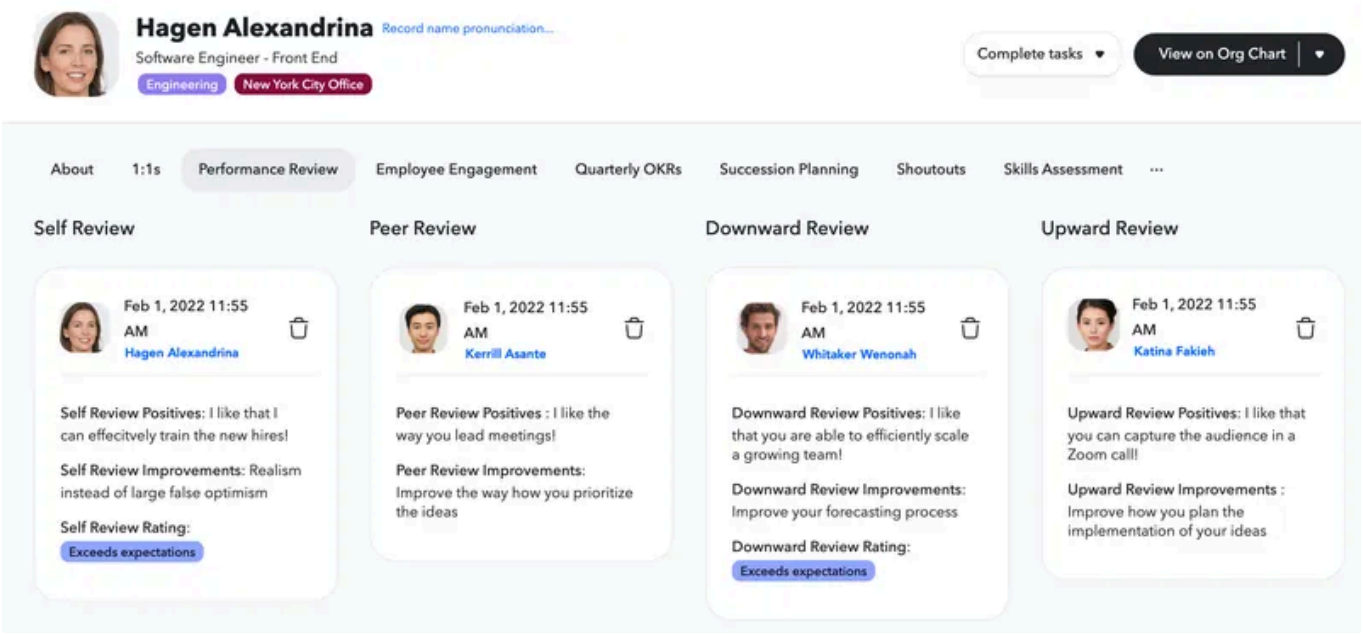
To display performance review data in the **Data Sheet** for your employees:

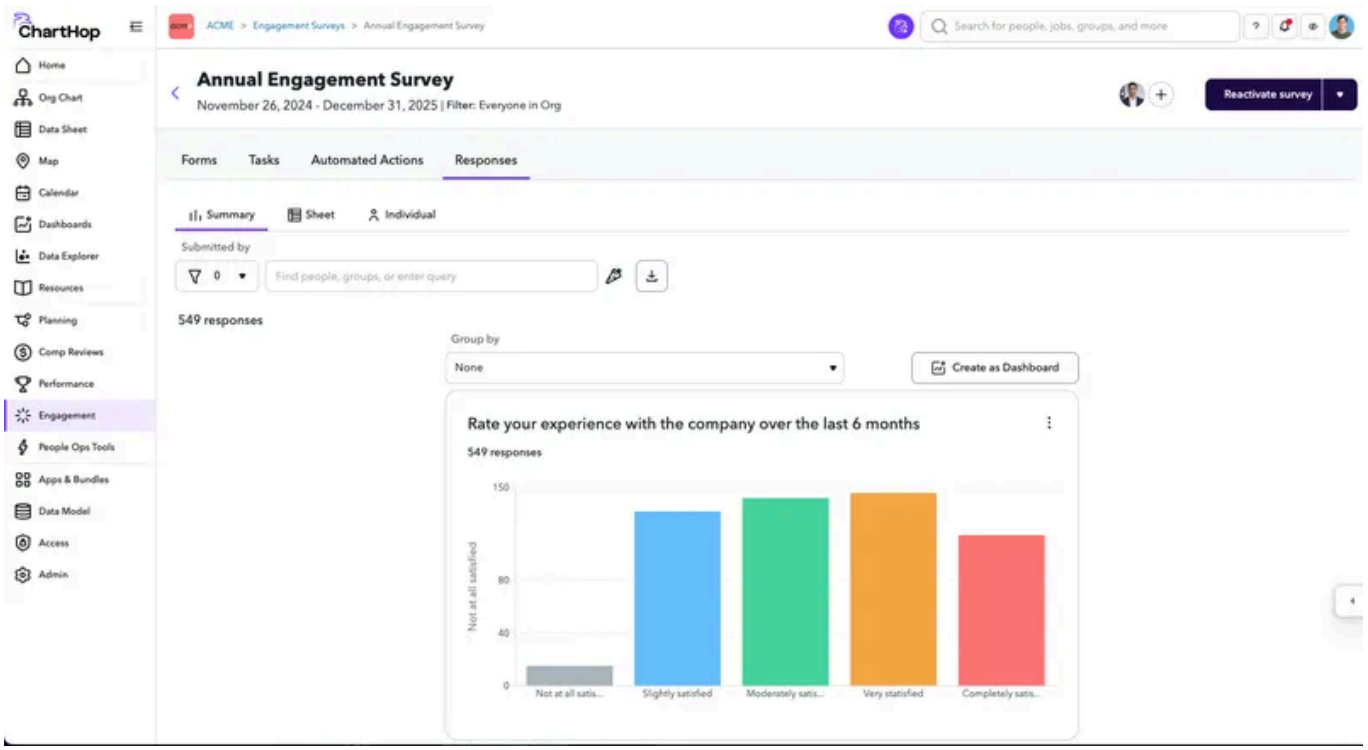
1. Navigate to the **Data Sheet**.
2. (Optional) Use the **+** icon to create a new view (for example, Review Rating).

3. Filter the employees that display on the **Data Sheet** using Carrot:
    - Enter `is:person under:"me":` to display all the employees that report to you.
    - Enter `is:person under:"Person's Name"` to display all the employees that report to a specific person.
    - Enter `is:person department:engineering` to display all the employees in a specific department (for example, Engineering).
    - You can also use the Filter dialog for additional filtering options. **Learn more.**
4. Select **Select columns**.
5. In the **Select columns** dialog, select the fields you want to display (for example, Self Review Rating and Downward Review Rating).
6. Select **Apply**. The fields and any collected performance review data display as new columns on the **Data Sheet**.

View review data on an Employee's profile

Your ChartHop admin can set performance review data to display on a custom tab in an Employee profile by linking performance review fields to that tab. This allows you to view performance review data for an employee in one place. **Learn more.**





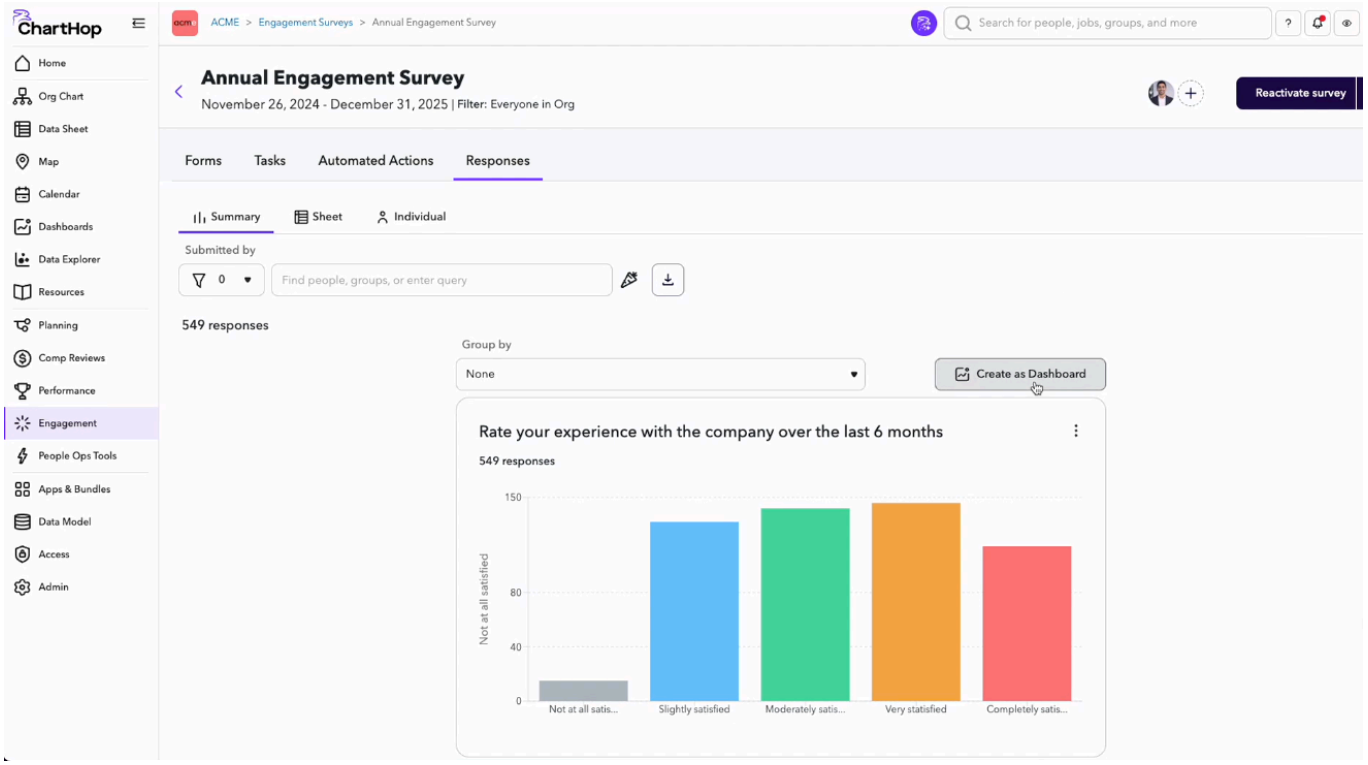
View a summary of survey responses

To view a summary of the survey responses:

1. From the left sidebar, select **Performance.**
2. Select the Review that you want to view.
3. Select the **Responses** tab. The **Summary** sub-tab will be selected automatically.
4. If your review has more than one form, select the form in the dropdown.

All available responses will be displayed in a default chart type.

If you would like to do additional analysis or share the responses with others, you can copy the response to a **Dashboard.**

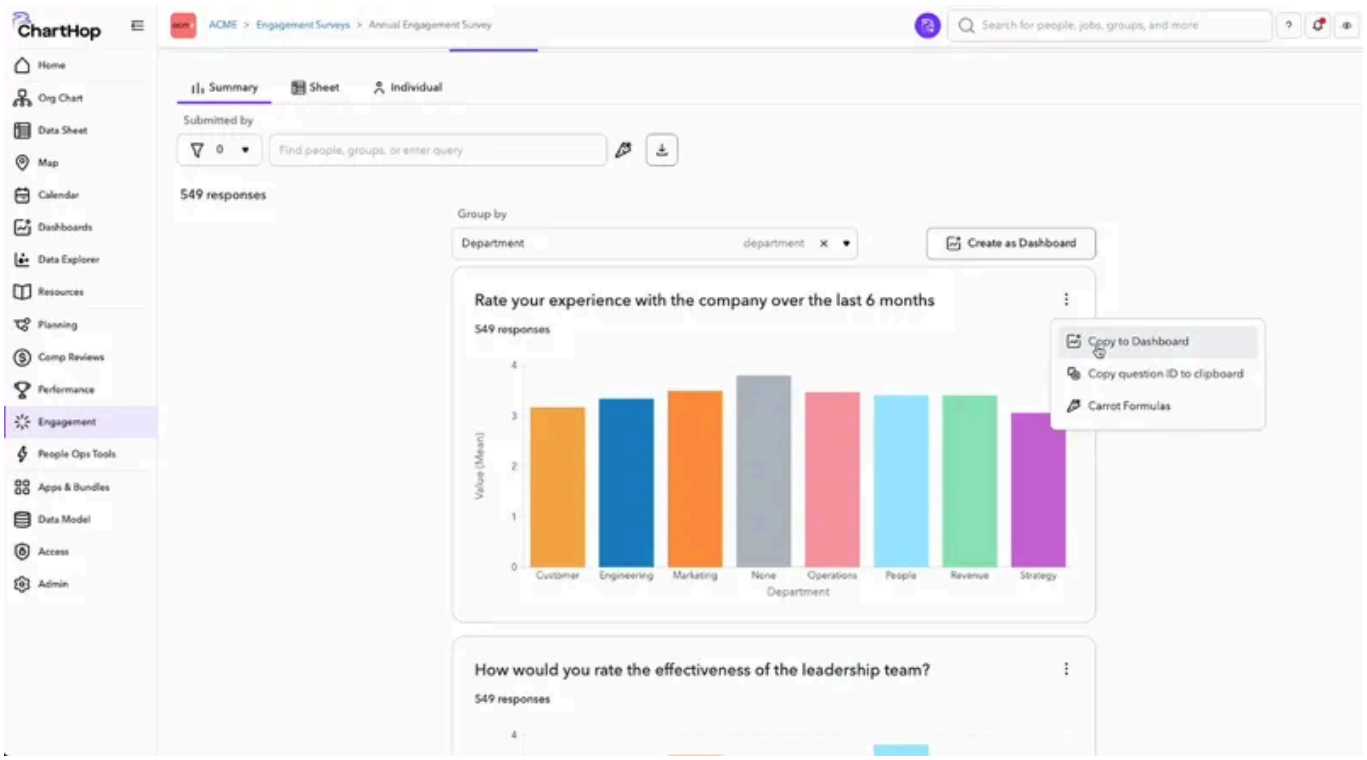


Create as Dashboard

Create a Dashboard of responses

To create a **Dashboard** of the review responses:

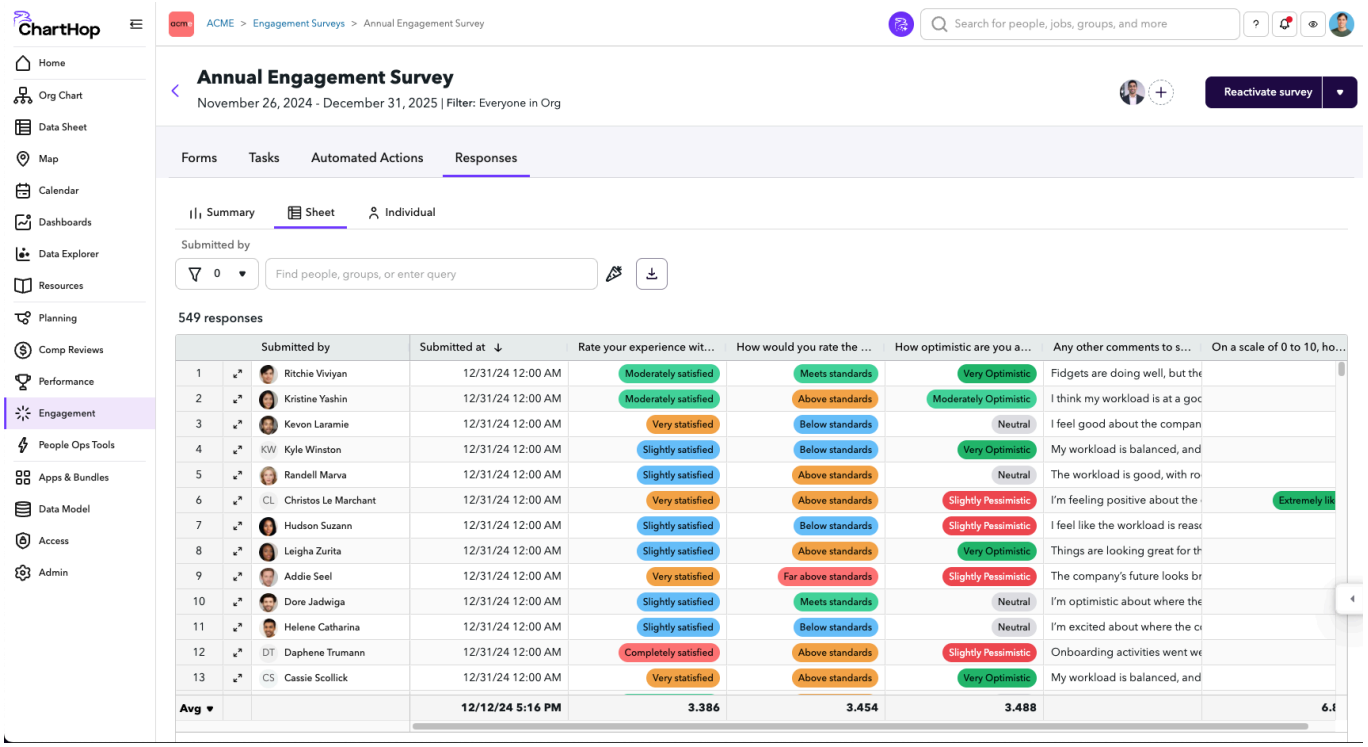
1. On the **Responses** tab of the **Review.**
2. Click the **Create as Dashboard** button.
3. A dashboard will automatically be created using the default charts for each question. Within the dashboard, you can then modify the chart type, add headers & text blocks, reorganize and then share. If you apply a **Group By** — that will



Copy chart to dashboard

If you just want to bring over an individual chart, you can also copy a chart to a dashboard.

1. On the **Responses** tab of the **Survey.**
2. Click the ⋮ menu button. Then select **Copy to Dashboard**.
3. In the Copy to Dashboard dialog, select the **Dashboard** that you would like to copy the chart to.
4. Select **Copy chart**. The chart will then by added to the end of the Dashboard

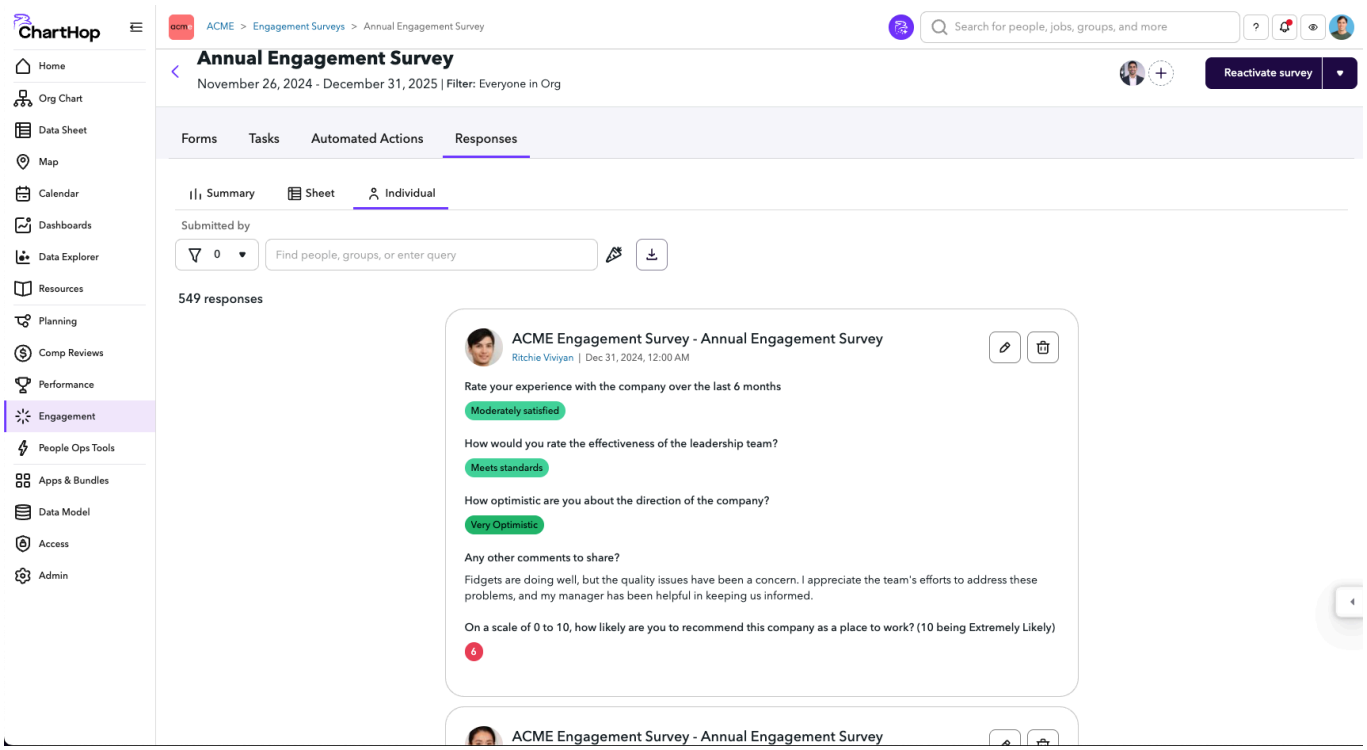


Sheet view of Responses

View individual form responses

To view individual review responses:

1. From the left sidebar, select **Performance.**
2. Select the Review that you want to view.
3. Select the **Responses** tab.
4. Select the **Data Sheet or Individual** sub-tab.



Individual Responses

Roles: Owner | Technical owner | People Ops Admin

5.8. Engagement surveys

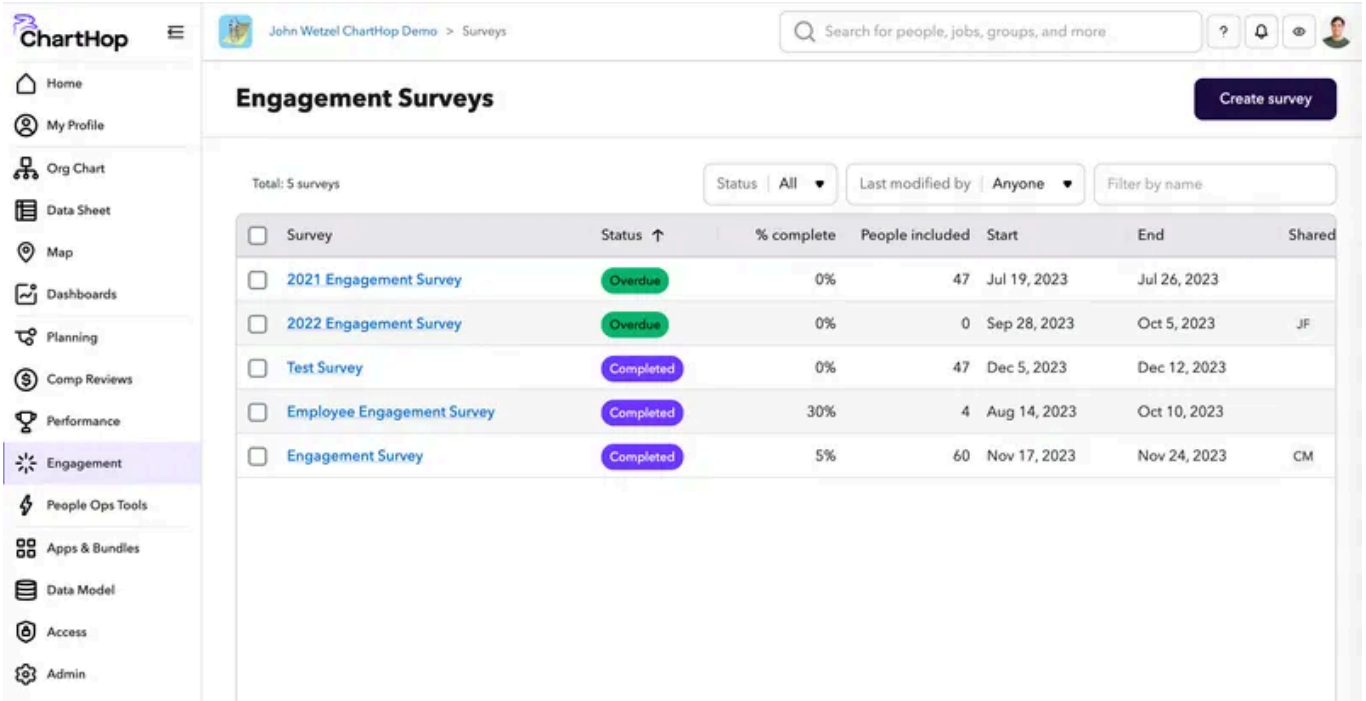
You can create and implement engagement surveys directly within ChartHop.

You can set up these surveys for a specific group of employees or everyone in your organization. All survey aspects, including sending and tracking forms, sending reminders, viewing completion, and analyzing data, can be accomplished within one centralized location.

> Before you can create a survey, create a form with all the questions that you would like to ask must have been set up in ChartHop by users with Owner or Technical owner access. **Learn more.**

Access surveys

You can view existing and create new surveys from the Surveys page.



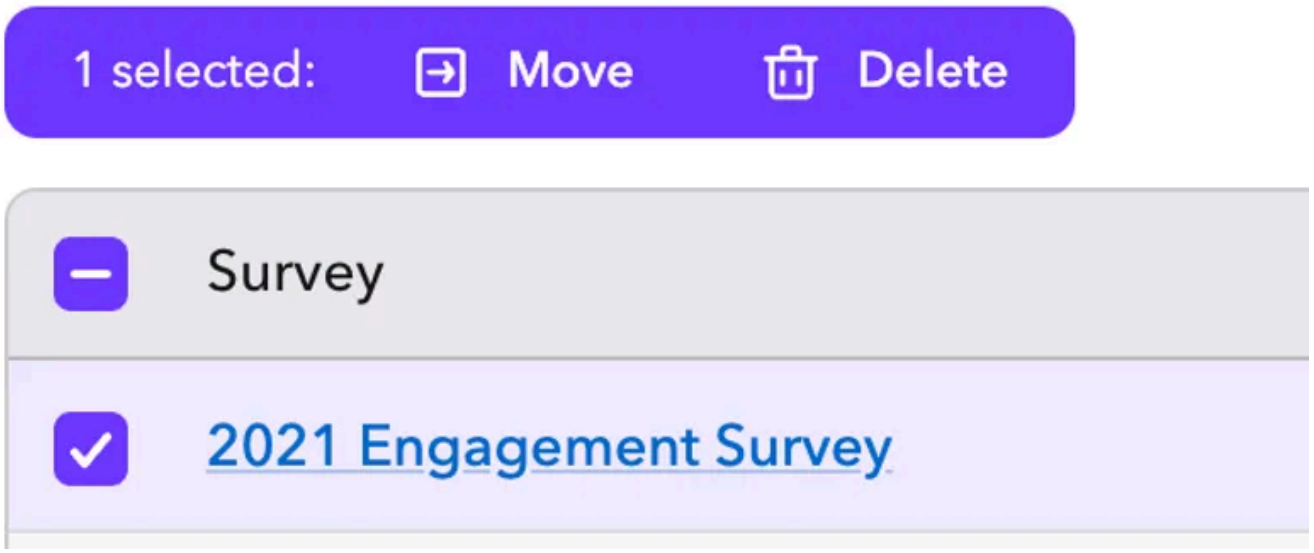
1. From the left sidebar, select **Engagement.**
2. Refine the list in the following ways.
    - Use the Status drop-down list to choose to view only surveys of a certain status.

- Use the Last modified by drop-down list to view surveys last modified by a particular person.
- Filter the list by the name of the person who created the surveys.

Move a survey to a review

ChartHop separated Reviews into Performance Reviews and Engagement Surveys. You can move items between the Reviews and Surveys by doing the following:

1. Go to the **Engagement Surveys** page
2. Select the survey that you would like to move
3. Select **Move** from the actions list
4. Confirm the move in the dialog



Modules: HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

5.8.1. Create a survey

Users with the Owner, Technical owner, Sensitive data viewer, and Compensation viewer roles can create surveys. However, the sensitivity of the data displayed in the survey itself for participants is controlled by the form and fields used in the survey. Only users with the Owner and Technical owner roles can create forms. **Learn more.**

To create a new survey:

1. From the left sidebar, select **Engagement.**
2. Select **Create survey**. The **Create Survey** dialog displays.
3. In the **Create Survey** dialog, enter information for the following fields:
    - **Name** - Enter the name of the survey cycle.
    - **Start date** - Select the start date for the survey cycle.
    - **End date** - Select the end date for the survey cycle.
    - **People to include** - Filter the people included in the survey (for example, dept: sales). You can add a filter when this survey applies only to a specific category of employees.
    - **Description** - Enter a description for the survey cycle.
4. Select **Save** to save your changes. Your survey displays in the Surveys list as **in progress**.

> **Packages:** Basic | **Standard*** | **Premium**
>
> * Available as an add-on

5.8.2. Adding forms to a survey

Once you've created a survey, you can select it from the **Engagement Survey** list.

When you first open your survey, it won't have any fields or tasks associated with it. You must first add a form to the survey.

> Forms are made up of built-in and custom ChartHop fields used by your organization to capture and store data. You can use these fields to create performance survey-specific forms to use in the survey. **Learn more.**

You can add multiple forms to each survey. For example, you may send a slightly different form to certain departments. When you add a form, you have the ability to specify the group of employees who will receive that form based on their information.

Adding a form to a survey involves the following steps:

1. Selecting a form for your survey
2. Adding people to your survey
3. Customizing the notification message for your survey
4. Reviewing and sending out the form to your participants

Setup a recurring survey

You can also set up a recurring survey using **Automated Actions**.

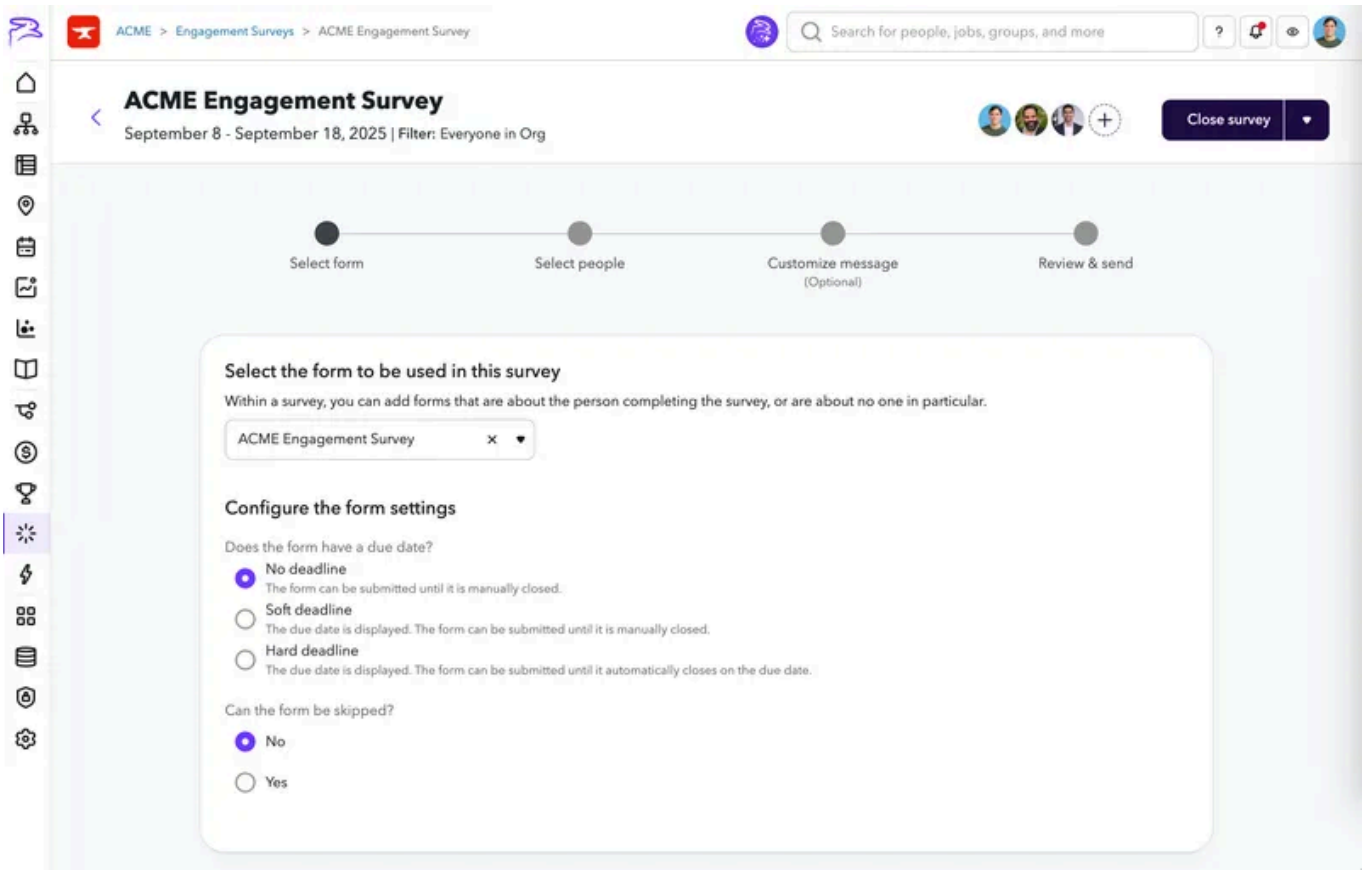
To set up a recurring survey:

1. Go to the survey
2. Go to the Automated Actions Tab
3. Create an Action, name the action for the survey
4. Link the Action to your Survey
5. Create a schedule for the Action
6. Add a step for sending the Form and select the Form you want to send.

7. Activate the action.

5.8.2.1. Select a form for the survey

Before you can create a survey, create the form that you want to send out as part of that survey. **Learn more about how to create forms.**

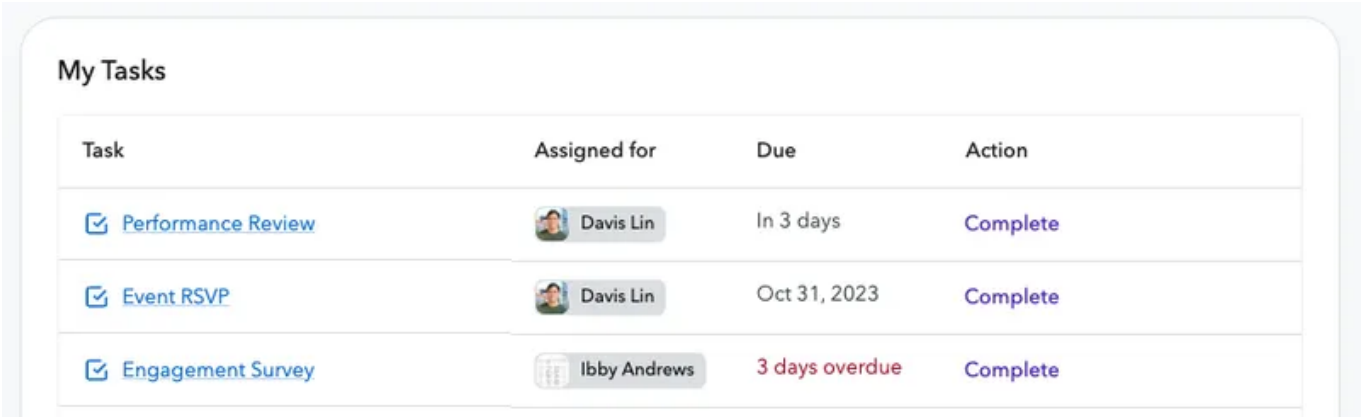


To select a form to use in the survey:

1. From the left sidebar, select **Engagement.**
2. Select your survey by selecting the name of the survey in the list.
3. From the **Forms** tab, select **Add form**.
4. **Select the form** to be used in the survey from the dropdown list.
    - Any form can be selected, but the setting of the form will determine who the form can be sent to
5. Choose an option for **Does the form have a Due Date?**
    - **No deadline**
    - **Soft deadline** → The form will display a due date. The tasks will not automatically expire at the due date. The form can be completed after the due date.

- **Hard deadline** → The form will display a due date and the tasks will automatically expire at the due time, will be removed from the home page and can no longer be completed.
    - **Select a Date & Time** that the form is due at. This time is aligned to your account's time zone.

6. Choose an option for **Can the form be skipped?**
    - **No** → Form is required and all survey participants must complete it *(Recommended for most survey uses)*
    - **Yes** → The form is optional and the person has the choice to either complete the form or skip it.
7. Select **Next** to continue.



Example of tasks with due dates

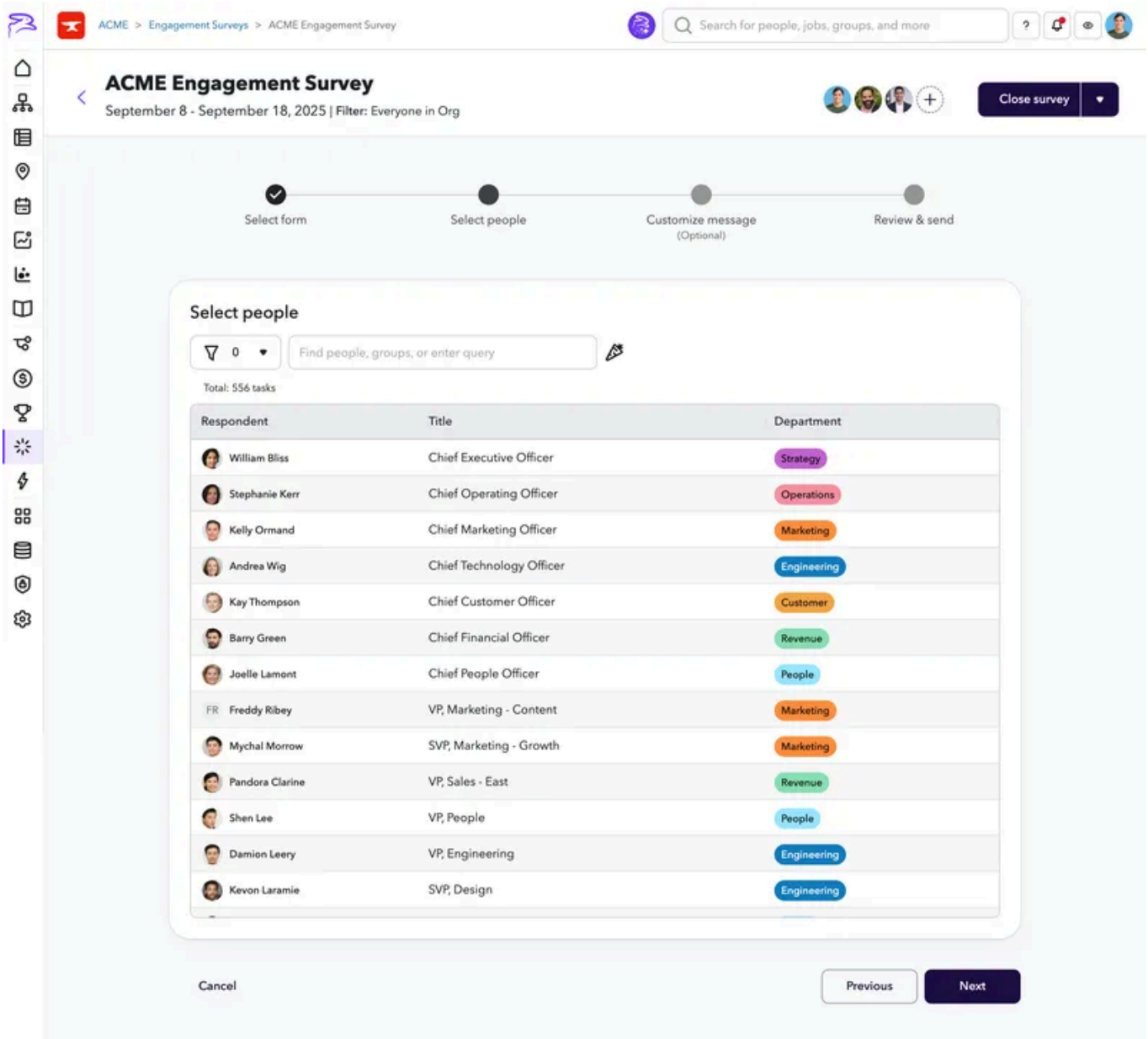
Modules: HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

5.8.2.2. Add people to a survey

After you select a form, you must select the individuals who are included as participants for that specific form.

The group of participants you established when you first created the survey are included by default. You can apply filters or use Carrot queries to further narrow down the group of recipients.

The **survey preview** section displays a list of all the participants who meet the criteria and are to be included in the survey for that specific form.



> To participate in a survey, employees must be members of your organization as well as active users in ChartHop. You cannot include an employee who is not a ChartHop user.

To select which people receive the form:

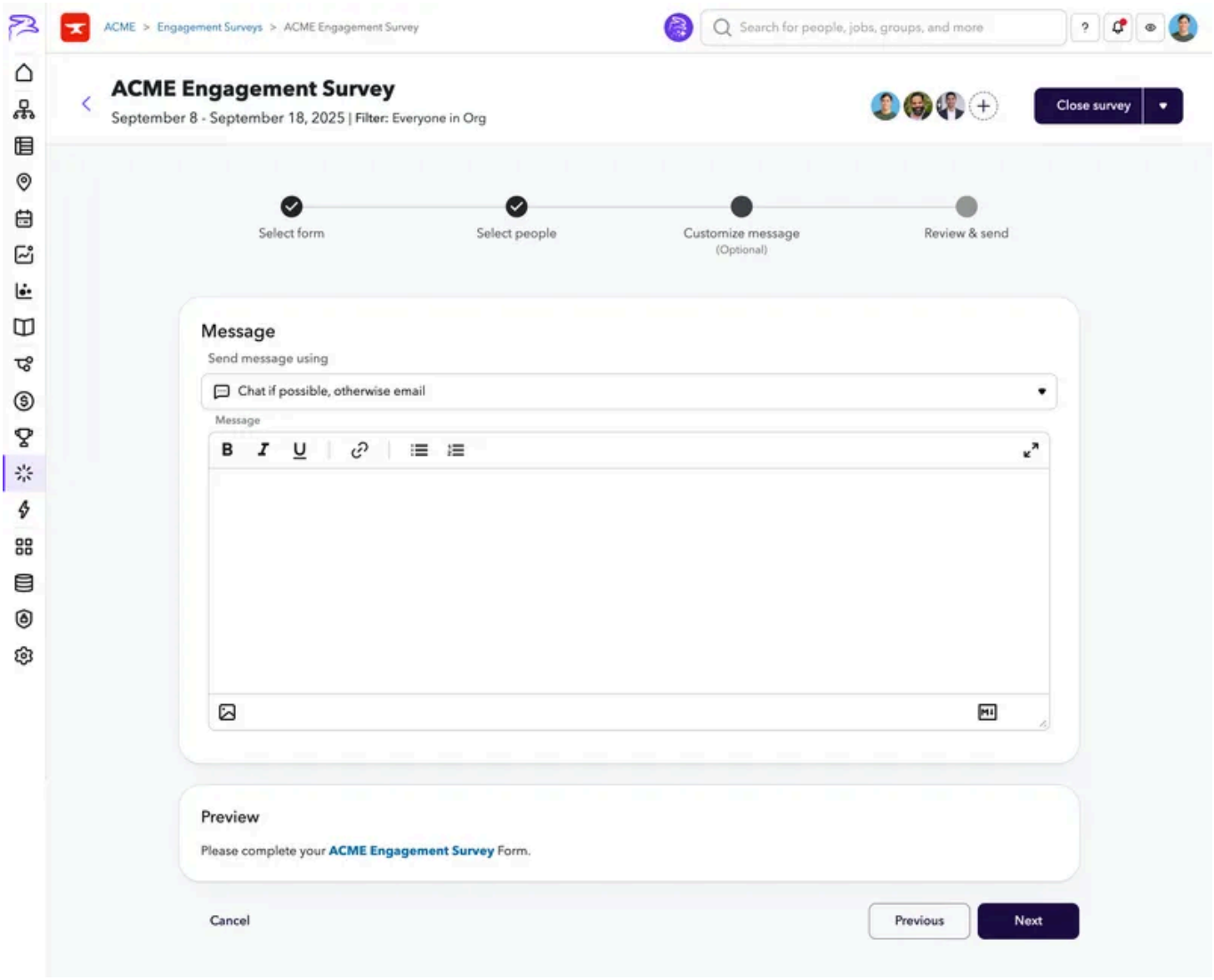
1. From the left sidebar, select **More** and select **Surveys**.
2. Select your survey by selecting the name of the survey in the list.
3. In the **Survey filters** section, use the filters or define a Carrot query to filter the group of employees to be included as participants. For example, you can filter by department when you are using department-specific forms.
4. Use the filters or a Carrot query to filter the group of employees to be included as participants.
5. Select **Next** to continue.

> **Modules:** HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

5.8.2.3. Customize the notification message

You can customize the notification that you send out to your reviewers when they receive the form you selected.

You can add additional instructions for your reviewers or remind respondents expectations for the review. Any due date you set will be included in the automatically generated part of the notification. This message displays to reviewers when they are invited to participate in the review.



> When you're integrated with Slack, ChartHop will notify the employees via Slack otherwise they will be notified via email. **Learn more.**

A preview of your message displays at the bottom of the page.

This is an optional step. Once you're done customizing the message, select **Next** to continue.

> **Modules:** HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

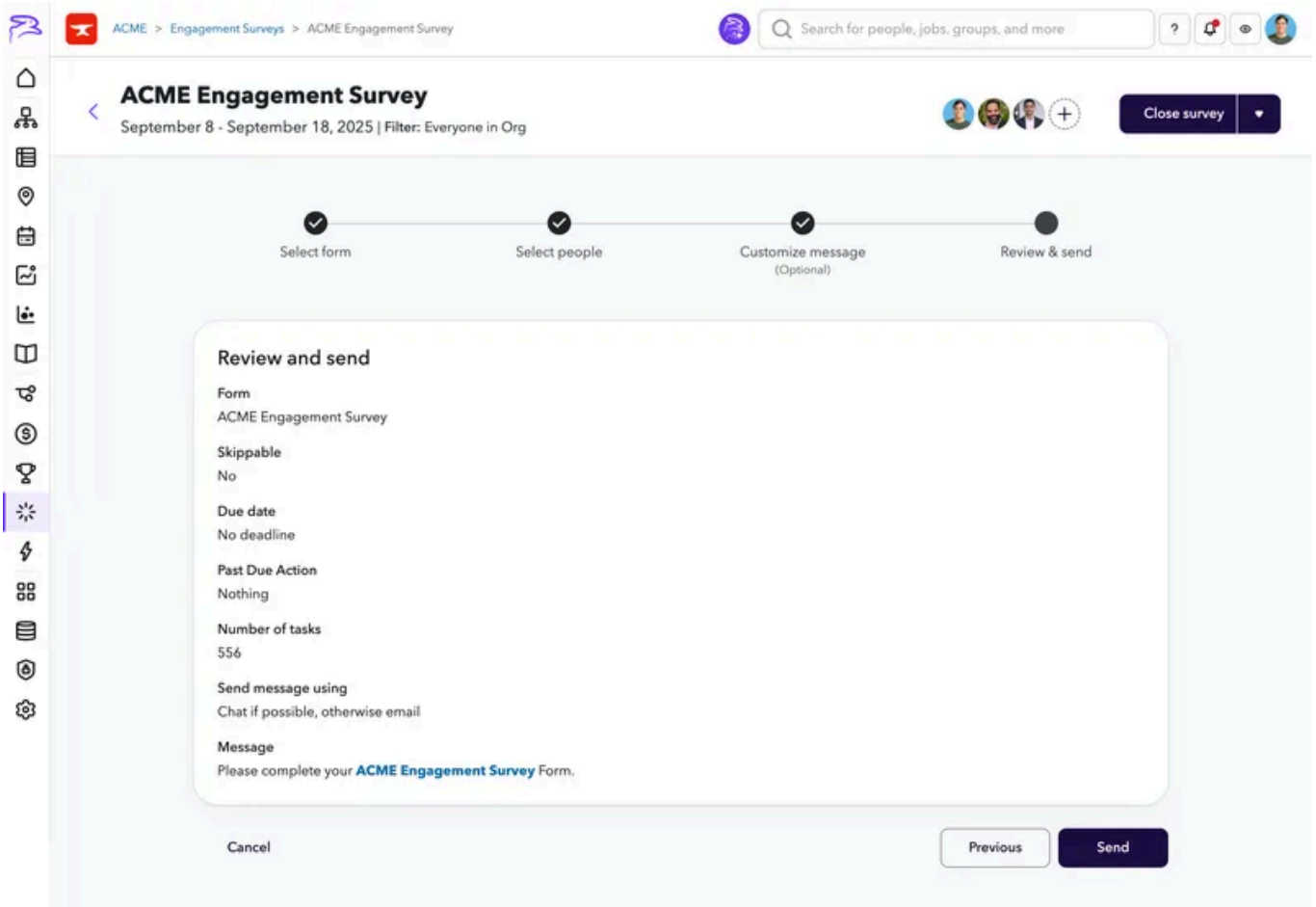
5.8.2.4. Review and send the form

You have the ability to review your form, settings, participants, and message before you send it out. Verify that the correct form is being sent out and that the number of employees included in the Form Summary matches the group of employees you want to include.

Click **Send** to send out the survey form to the included group of participants and launch your survey.

> When you're integrated with Slack, ChartHop will notify the employees via Slack otherwise they will be notified via email. Learn more.

After you send out a form, it displays in the **Forms** tab of your survey. You can select **Add form** to repeat the process and add additional forms to the survey.



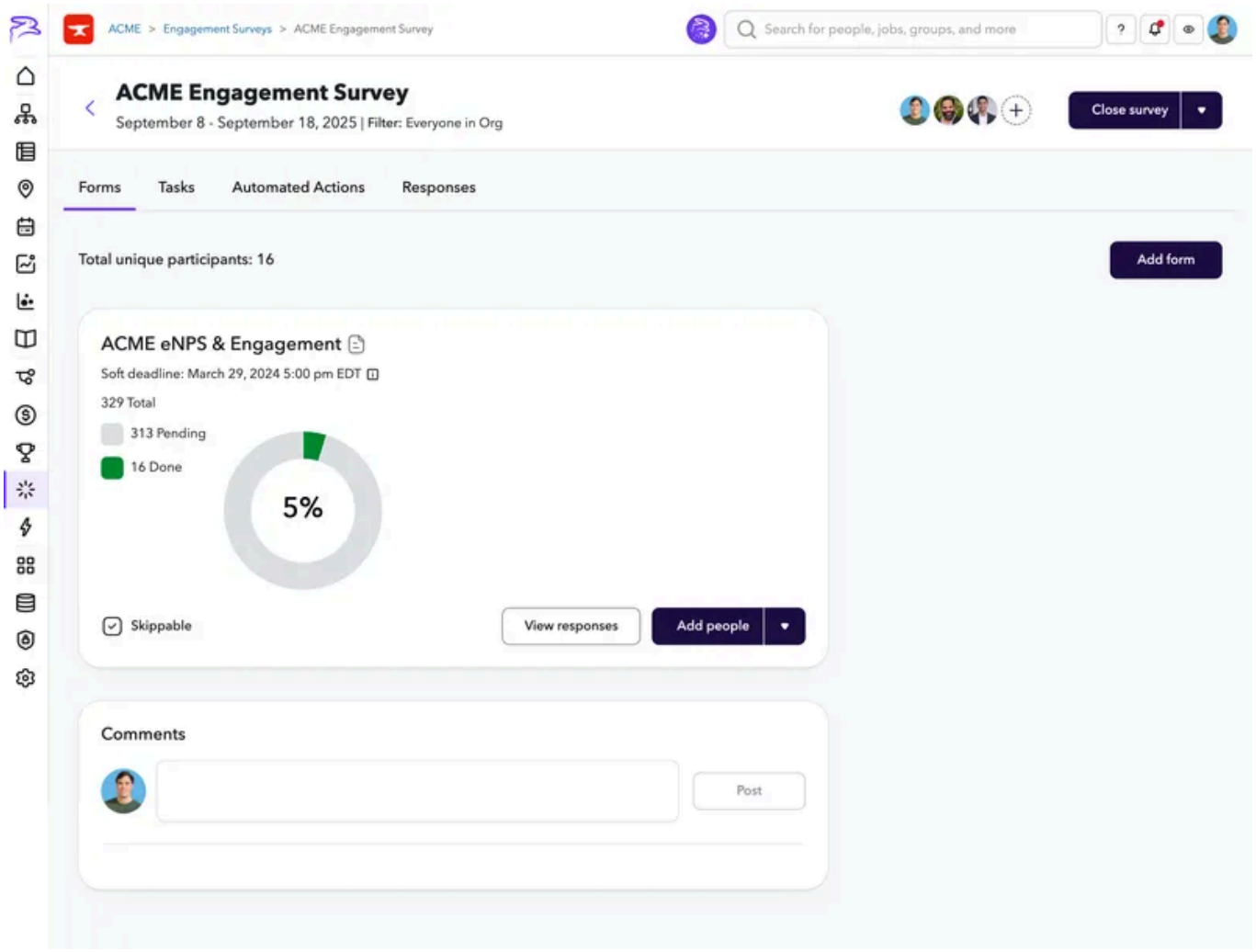
> **Modules:** HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

5.8.3. Managing forms in a survey

The **Forms** tab displays all the forms you have sent out as part of your survey cycle, including their current submission completion status.

You can select the page icon next to the form name to display a preview of the form that was sent out.

In addition, you can select **Add people** to add another group of people as recipients of that specific form. This is useful for cases where you have maybe omitted a group of people or changed directions in terms of who should be included. Learn more.



Send reminders for a specific form

You can send reminders to participants directly from the **Forms** tab to encourage your participants to submit their form.

To send a form-specific reminder:

1. In the **Forms** tab, navigate to the form whose recipients you want to remind.
2. In the **Add people ▼** dropdown menu, select **Send reminder**. The **Send reminder** dialog displays.
3. (Optional) In the **Send reminder** dialog, enter a reminder message.
4. Select **Send**. The reminder is sent to everyone included for that specific form who has not already completed their submission. Reminders are sent via email or Slack (when configured).

Close a form

Closing a form is like enforcing a deadline. It will expire all of the tasks, so that the people can no longer complete the form. removes the form from the survey and clears all associated pending to-dos for individuals who have already received the form.

Forms that have been submitted and are awaiting approval will still be able to be approved after the form is closed.

To delete a form:

1. In the **Forms** tab, navigate to the form you want to delete.
2. In the **Add people ▼** dropdown menu, select **Close form**. The **Close form** dialog displays.
3. Select **Confirm**. The form will then be closed and the tasks expired.

Remove a form from the survey

Deleting a form permanently removes the form from the survey and clears all associated pending tasks for individuals who have already received the form.

Deleting the form only removes the form from the survey - any data that has already been collected using the form is not deleted and the form remains active and available for use throughout ChartHop.

To delete a form:

1. In the **Forms** tab, navigate to the form you want to delete.
2. In the **Add people ▼** dropdown menu, select **Remove form**. The **Remove form** dialog displays.

3. Enter **DELETE** to confirm.
4. Select **Delete**. The form is deleted from the survey and removed from participant dashboards.

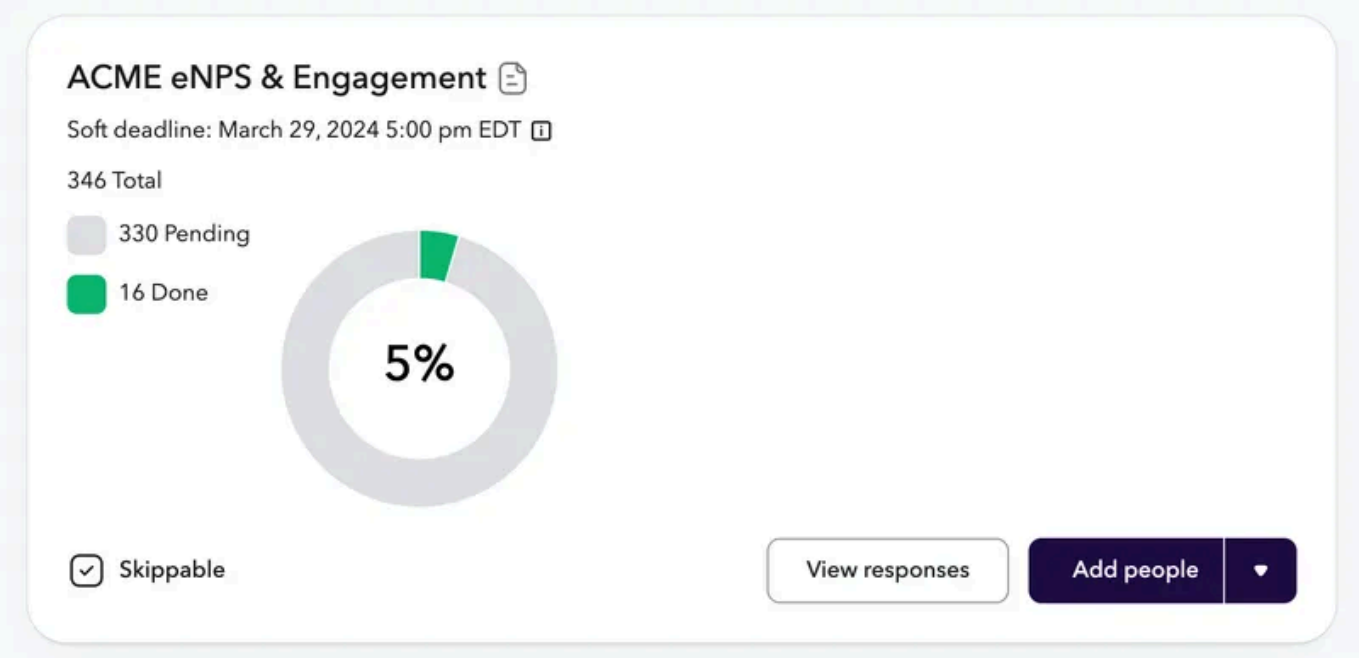
Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

5.8.4. Monitoring participation in a survey

Survey Participation

To monitor the overall participation in a survey, go to the **Forms** tab within the survey. Each form will display the status of the indiviual forms and the overall completion percentage.



Participation statuses

Depending on the **configuration of your form**, your will see different statuses to reflect that various states of form completion or **Form responses workflows**. Here are the statuses:

Awaiting the next action:

- `Pending` - The form is awaiting initial submission.
- `Awaiting Approval` - The form has been submitted but not approved.
- `Awaiting Release` - The for has been submitted and if applicable approved but not yet released.

Completed statuses: These contribute to the completion percentage in the center of the graph.

- `Done` - The form has been submitted and that is the final step.

- `Approved` - The form has been approved and that is the final step.
- `Released` - The form has been released and that is the final step.
- `Skipped` - The form has been skipped and will not be completed.

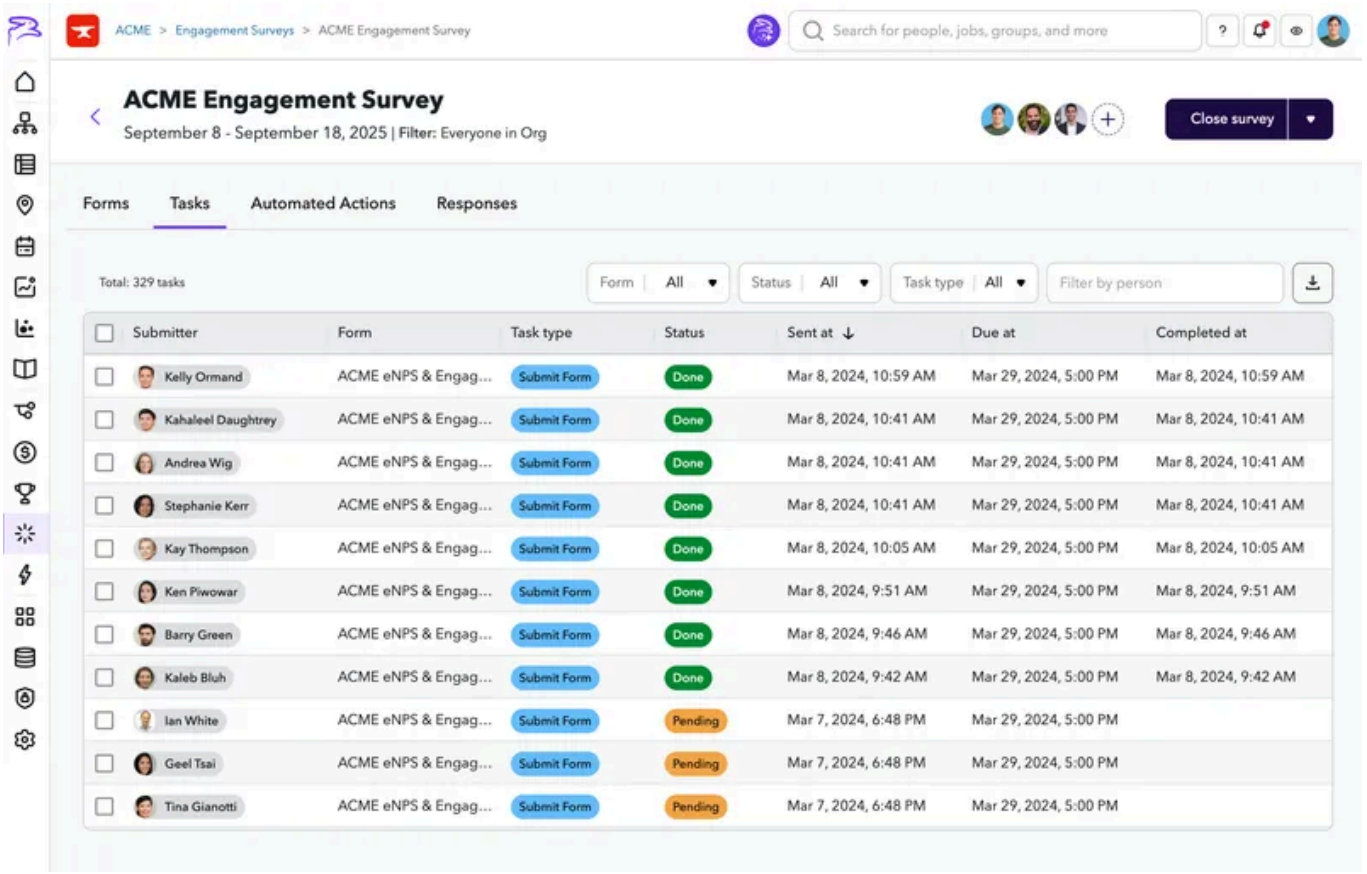
End statuses:

- `Expired` - The form has closed and these forms will not be completed.
- `Rejected` - The form response was rejected and will then be again awaiting approval.

Tasks Tab

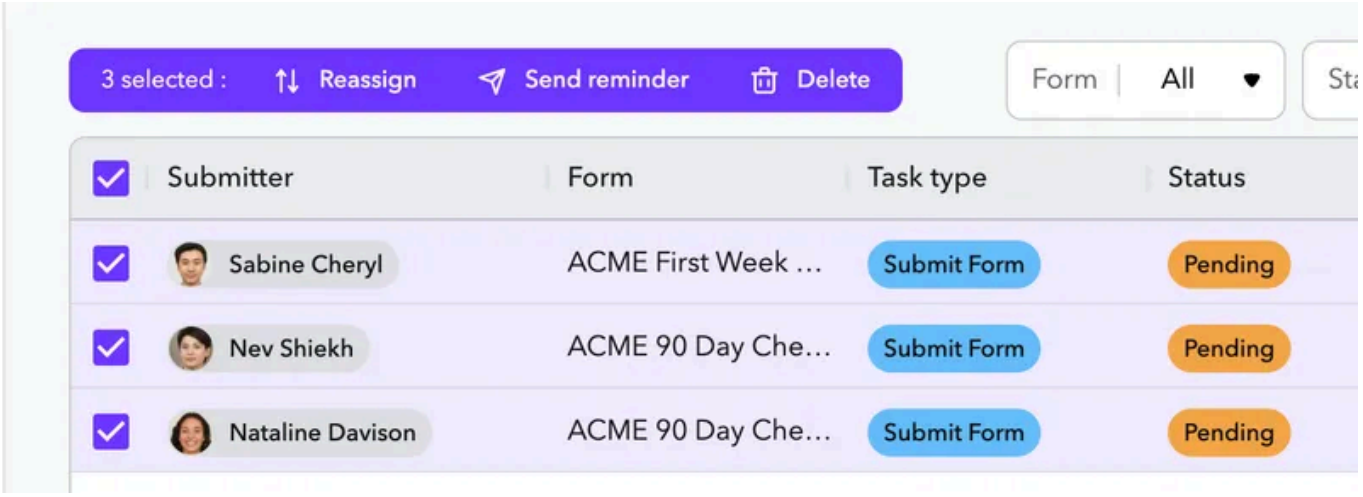
On the **Tasks** tab, you can view a list of all the tasks that have been created as part of the Survey.

From the Tasks tab, you can see all Submitters, the associated form, the task type, task status, sent date/time, due date/time and completion date/time.



You can filter the list by form, task type, status or by submitter.

Select the checkbox next to a row to perform any of the following bulk actions:



Reassigning a task

You can reassign a `Pending` Submit Form task to another person, such as a new manager, if you need to.

To reassign a task:

1. In the **Tasks** tab, navigate to the task you want to send a reminder for. Select the checkbox next to the task or tasks.
2. At the top of the table, click **Reassign**.
3. In the Reassign Tasks dialog, select the person to reassign the tasks to.
4. [Optional] Add a message that will be included in the email or chat message to them when they receive notification of the task assignment
5. Click reassign tasks. The person will them be notified of the task assignment.

Send a task reminder

You can send task reminders directly from the **Tasks** tab for Pending Tasks to encourage a submitter to submit their survey. You can customize the reminder message for each subgroup to try to drive action.

To send a task reminder:

1. In the **Tasks** tab, navigate to the task you want to reassign. Select the checkbox next to the task or tasks.
2. At the top of the table, click **Send Reminder**.
3. In the Send Reminder dialog, optionally add a message that will be included in the email or chat message to them when they receive notification of the task assignment

4. Click send reminder. The person will them be re-notified of the task.

Delete a task

Deleting a task permanently removes the task from the survey.

To delete a task:

1. In the **Tasks** tab, navigate to the task you want to delete. Select the checkbox next to the task or tasks.
2. At the top of the table, click **Delete** .
3. In the Delete confirmation dialog, type DELETE.
4. Click **confirm**. The tasks will then be deleted.

Export tasks

From the **Tasks** tab, you have the ability to export employee data as a spreadsheet.

To export tasks:

1. In the **Tasks** tab, select **Export CSV**. The **Export CSV** dialog displays.
2. In the **Export type** dropdown, select an export type. You can select from the following:
    - **Pending Tasks Only** - Exports a list of pending tasks.
    - **All Tasks** - Exports a list of all tasks associated with the current survey cycle.
3. (Optional) Select whether to include ChartHop IDs or former employees (if applicable) in the spreadsheet.
4. Select **Export**.
5. Once the export is complete, select **Download** to save the generated .csv file.

> **Modules:** HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

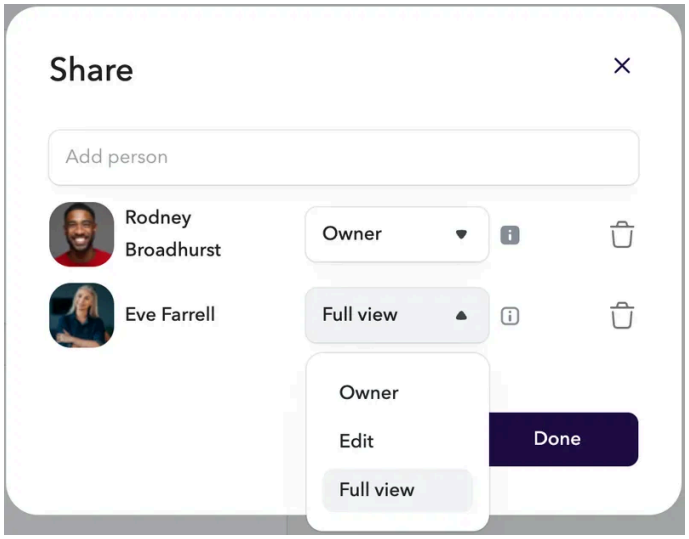
5.8.5. Collaborating in a survey

You can share your survey with your peers so that multiple people can edit the survey and monitor its progress.

Survey permissions

You can assign the following permissions to the people you're collaborating with:

- **Owner** - Indicates this person has full access to the survey; they can view, edit, and share the survey with others.
- **Edit** - Indicates this person can view and edit everything in the survey.
- **Full view** - Indicates this person can view everything in the survey, but cannot make edits.



Share a survey

Share a survey

To share a survey with another person:

1. Access your survey from the **Engagement Survey** page.
2. In the top right of your survey, select the **+** icon next to your profile image to display the **Share** dialog.
3. In the **Add Person** field, search for the person you want to collaborate with in the survey.

4. Use the dropdown to assign the level of permission this person has for the survey. You can select from the following:
    - **Owner**
    - **Edit**
    - **Full view**
5. Select **Done**.

Your collaborators are notified that you have added them to the survey. You can remove any collaborators from the survey by selecting the trash can icon next to their names in the **Share** dialog.

> Collaborators will only be able to see form responses that they have access to based on their role and permissions.

5.8.6. Closing a survey

You can close a survey at any time - regardless of completion percentage.

To close a survey cycle:

1. Select **Close survey** in the top right corner.
2. Select **Confirm**.
    - Your survey is marked as completed.
    - Any pending tasks for all forms are expired and removed from participant dashboards.

Reactivate a survey

You can select **Reactivate survey** to open all of the previously expired tasks within a survey.

Once you reactivate a survey, all pending tasks are moved back to pending and sent out to the appropriate participants.

Once a survey is past the end date you established when creating the survey, an **Overdue** indicator displays when you access the survey. However, this does not affect the survey status.

Packages: Basic | **Standard*** | **Premium**

* Available as an add-on

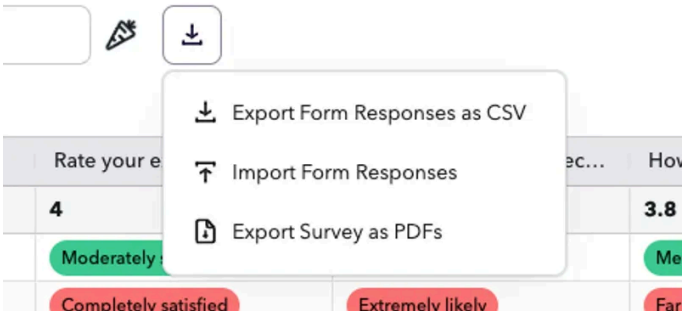
5.8.7. Export form responses in a survey

You have the ability to export all submitted forms in a survey as either a CSV or PDF.

Exporting as a CSV

To export a CSV of a survey:

1. Access your survey.
2. In the **Responses** tab, select **Sheet**.
3. From the **Form** dropdown, select the Form from the survey that you would like to export the responses for. Add any filters if you want only export a subset of the form responses.
4. Click the **Export** Icon Button. Then select, **Export as Form Responses as CSV**.
5. Select your data formatting options.
6. Click **Export CSV**.
7. Once the export is complete, select **Download Export** to save the .csv file.



Exporting as a PDF

When you export surveys in .pdf format:

- All forms from the survey will be included in the PDF.
- All surveys are generated as separate .pdf files within a single .zip file.
- The files will use the naming convention of: `{{Survey Name}} - {{First Name}} {{Last Name}}.pdf` For example: `Onboarding Survey - Sarah Smith` or for an anonymous form: `Onboarding Survey - Response 1`

To export .pdf files for a survey:

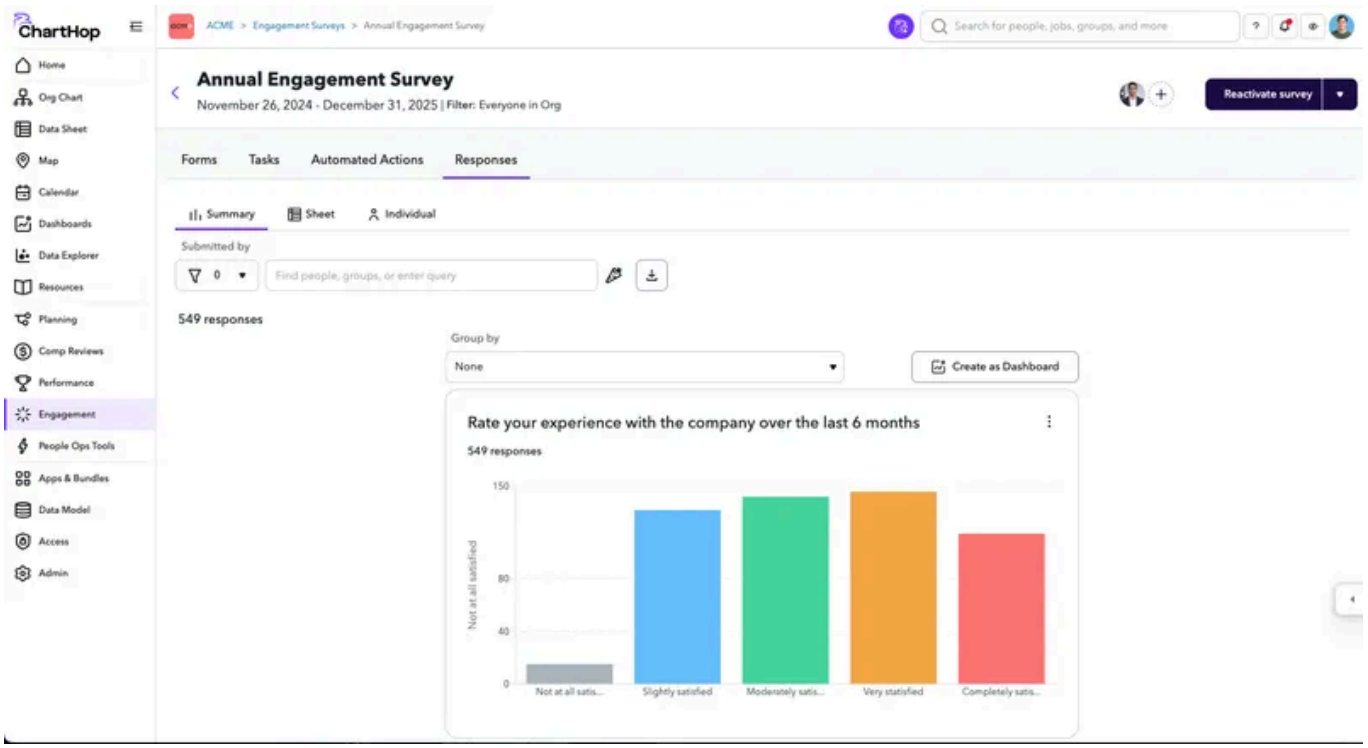
1. Access your survey.
2. In the **Responses** tab, select **Sheet**.
3. Click the **Export** Icon Button. Then select, **Export Survey as PDFs**.
4. (Optional) Add a filter the for the Survey you want to export.
5. Click **Export PDFs**.
6. Once the export is complete, select **Download Export** to save the .zip file.

Example PDF Export

Engagement Survey - Response 1.pdf

5.8.8. View survey responses

After you have collected responses for a survey, you are able to view a summary responses immediately.



View a summary of survey responses

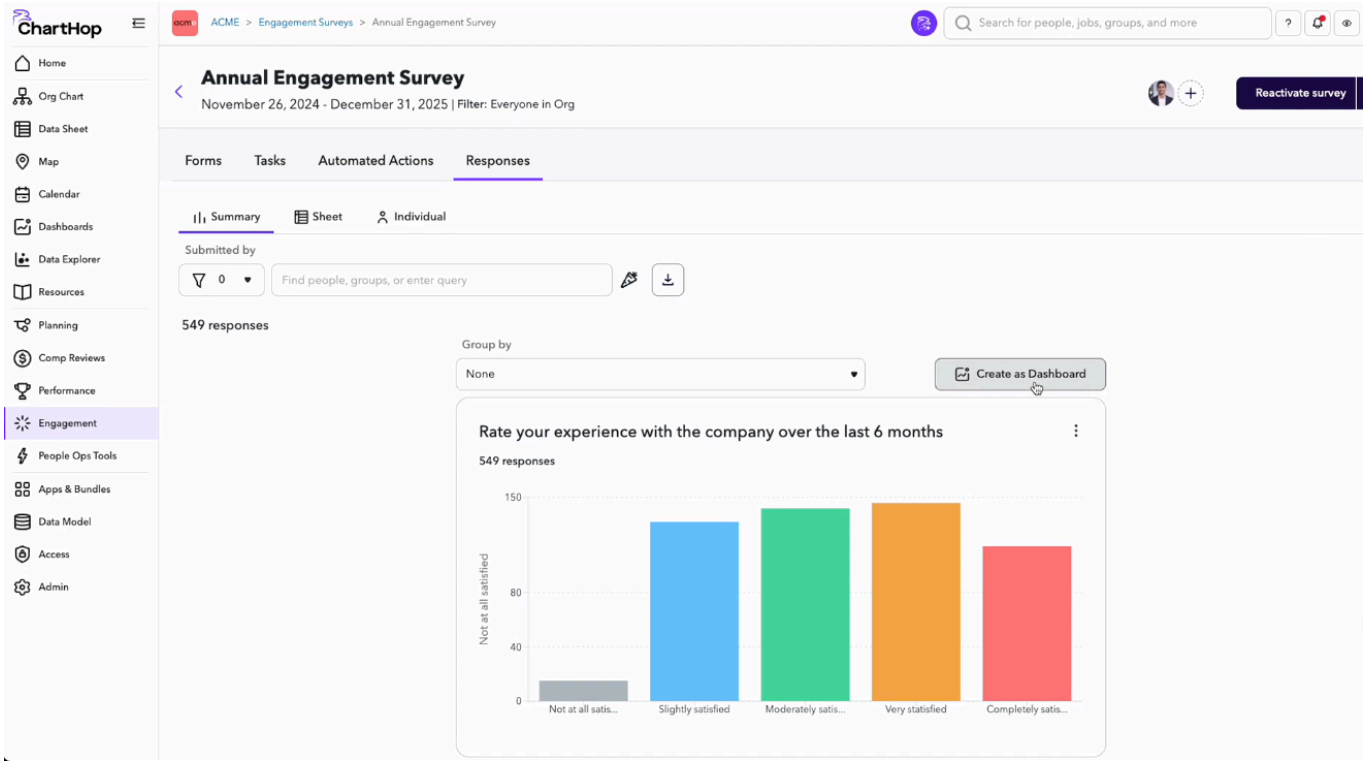
To view a summary of the survey responses:

1. From the left sidebar, select **Engagement.**
2. Select the Survey that you want to view.
3. Select the **Responses** tab. The **Summary** sub-tab will be selected automatically.
4. If your survey has more than one form, select the form in the dropdown.

All available responses to the survey will be displayed in a default chart type.

Net promoter questions will also display the NPS value for that question.

If you would like to do additional analysis or share the responses with others, you can copy the response to a **Dashboard.**

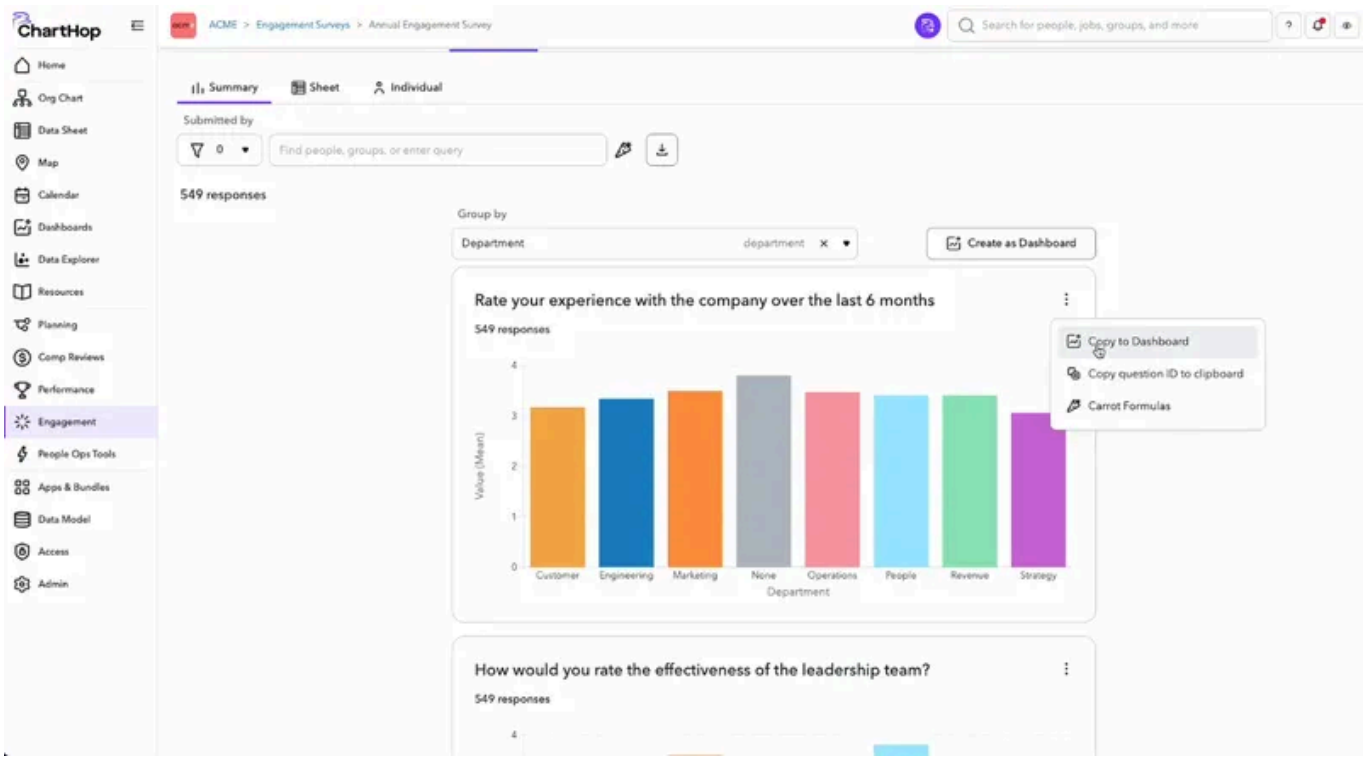


Create as Dashboard

Create a Dashboard of responses

To create a **Dashboard** of the survey responses:

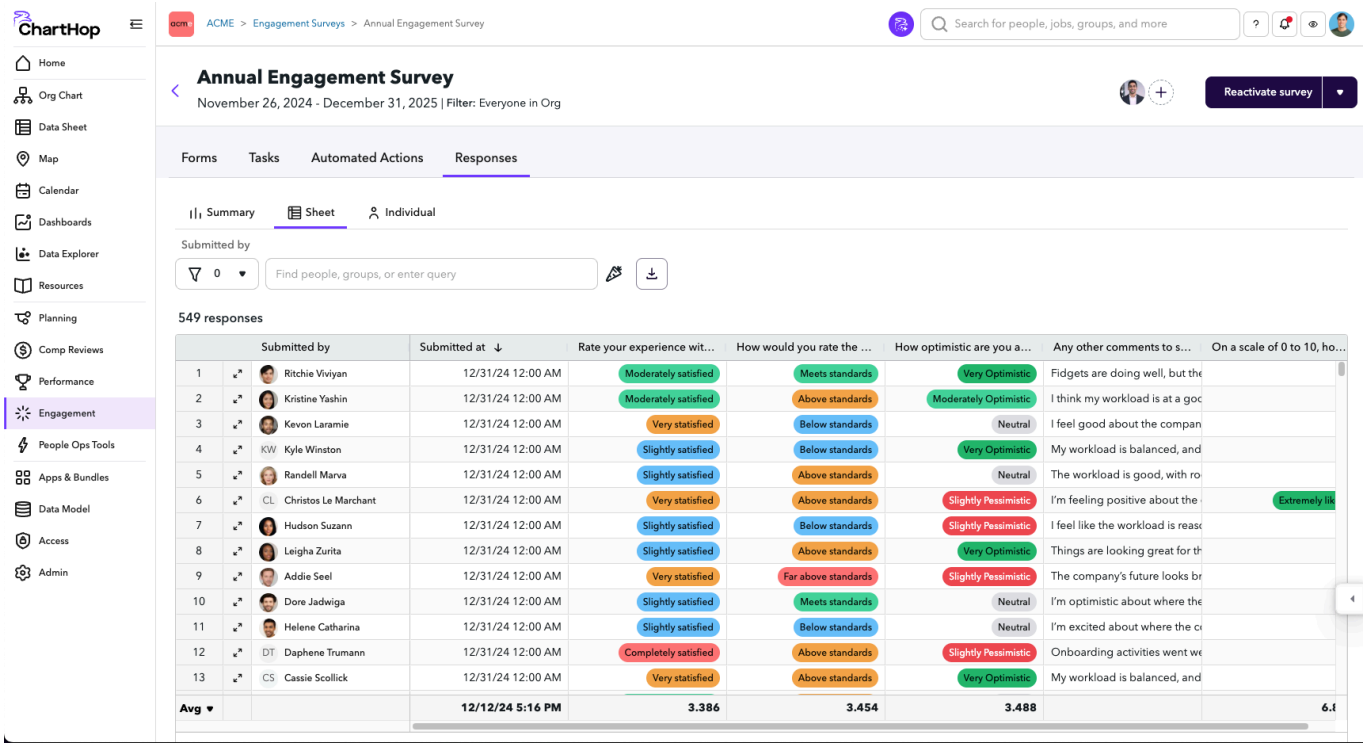
1. On the **Responses** tab of the **Survey.**
2. Click the **Create as Dashboard** button.
3. A dashboard will automatically be created using the default charts for each question. Within the dashboard, you can then modify the chart type, add headers & text blocks, reorganize and then share. If you apply a **Group By** — that will be copied over as well.



Copy chart to dashboard

If you just want to bring over an individual chart, you can also copy a chart to a dashboard.

1. On the **Responses** tab of the **Survey.**
2. Click the ⋮ menu button. Then select **Copy to Dashboard**.
3. In the Copy to Dashboard dialog, select the **Dashboard** that you would like to copy the chart to.
4. Select **Copy Chart**. The chart will then by added to the end of the Dashboard

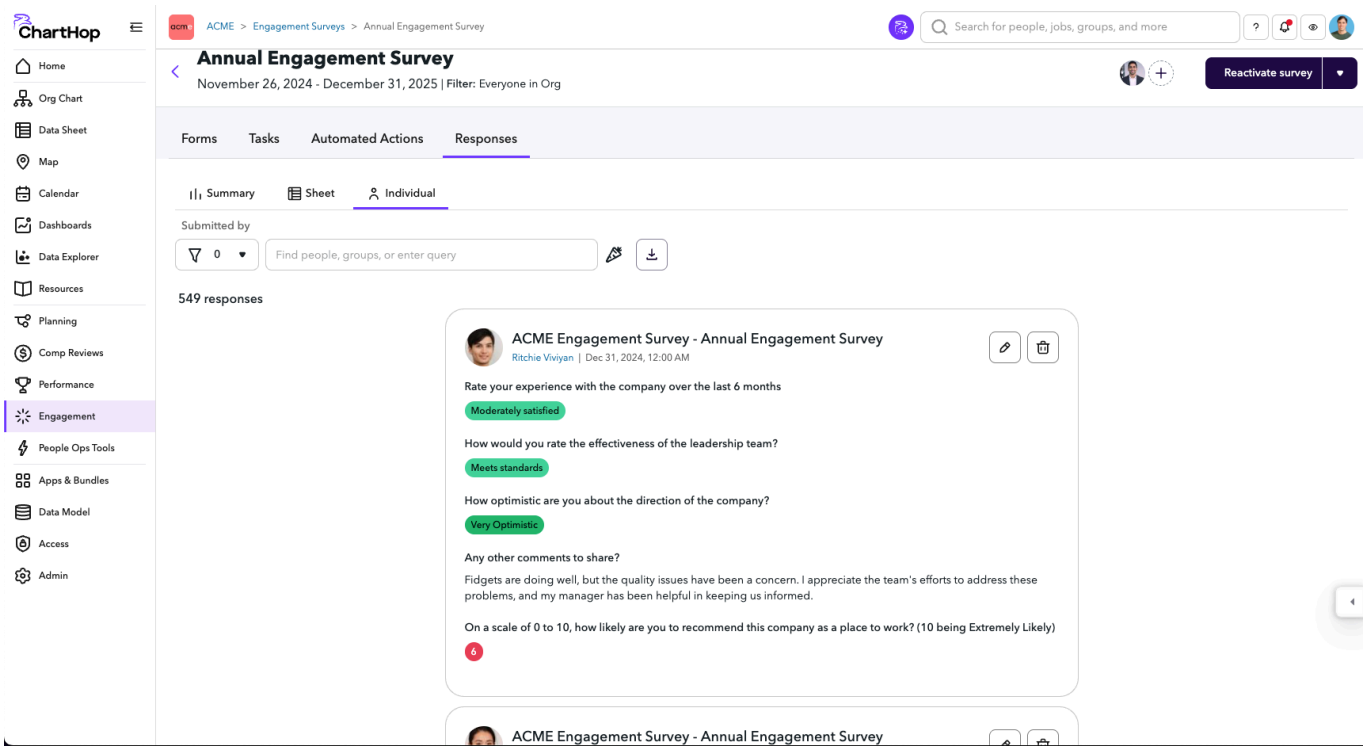


Sheet view of Non-Anonymous Survey Responses

View individual form responses

To view individual survey responses:

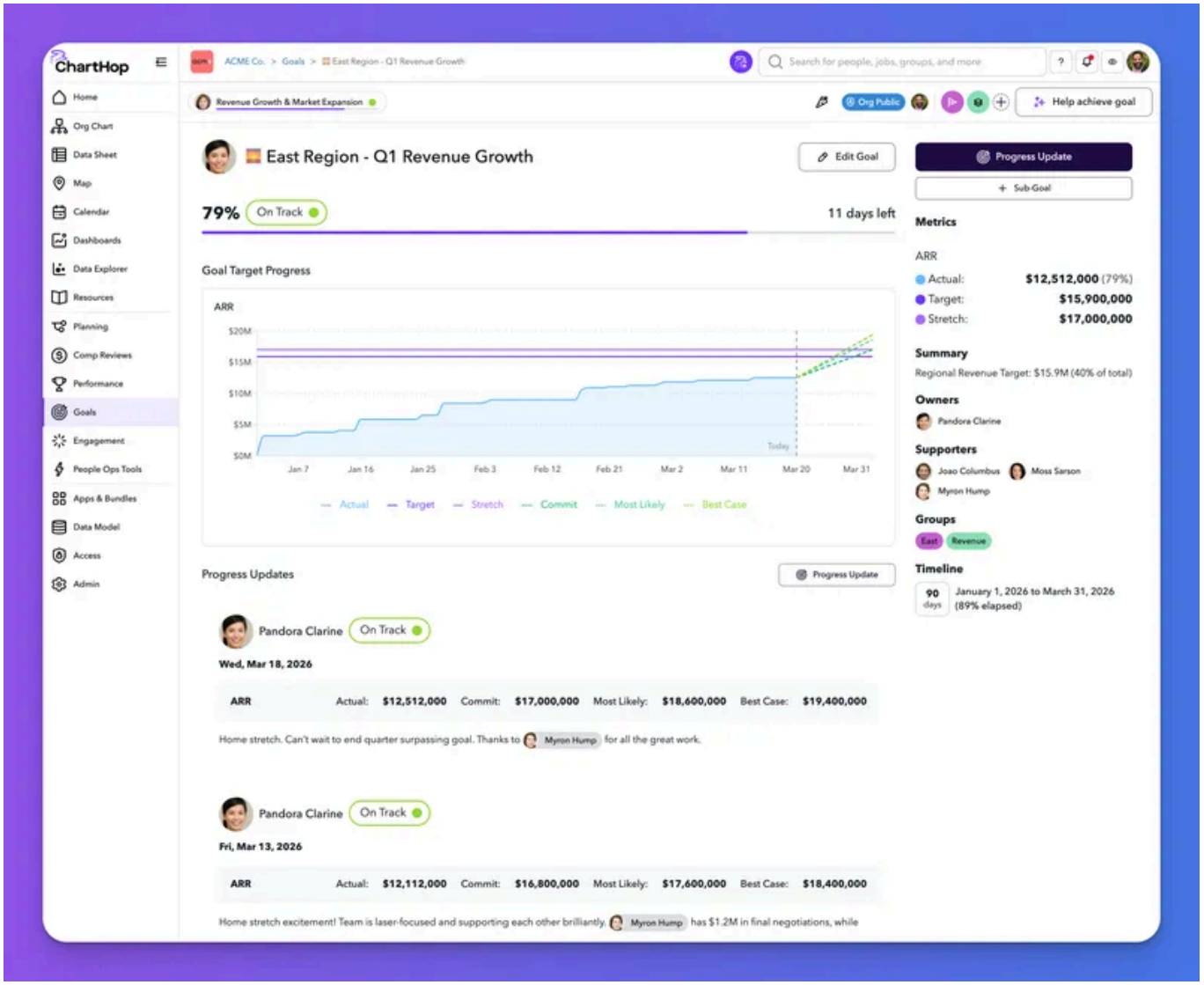
1. From the left sidebar, select **Engagement.**
2. Select the Survey that you want to view.
3. Select the **Responses** tab.
4. Select the **Data Sheet or Individual** sub-tab.



Individual Response view of Non-Anonymous Survey Responses

Roles: Owner | Technical owner | People Ops Admin

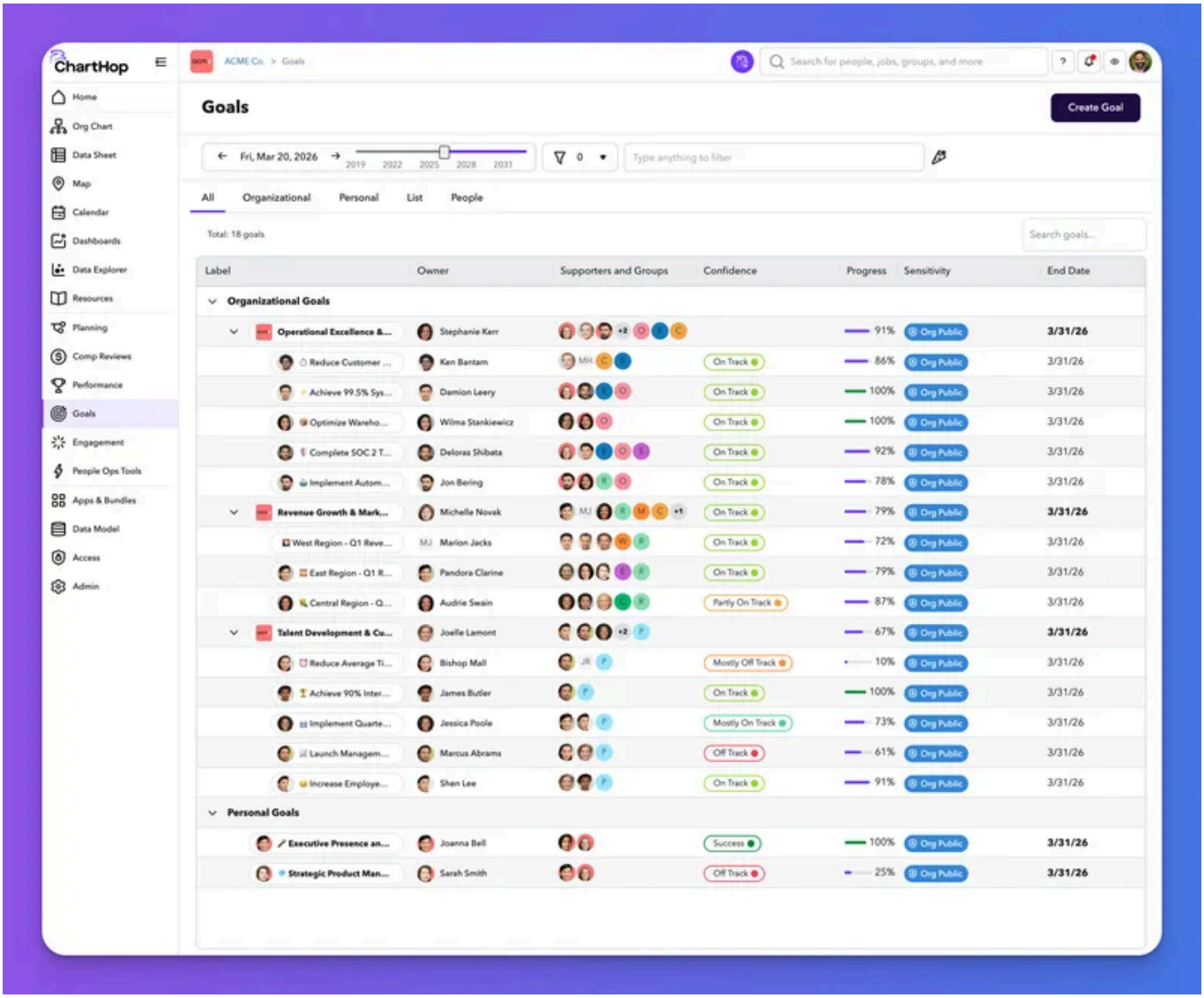
5.9. The Goals page



Goals is a ChartHop module that connects strategy to execution by letting leaders set objectives at the company level, cascade them to teams and individuals, and track progress in real time - whether through manual updates or automatic signals from connected systems like Salesforce and Zendesk.

Goals live inside the same platform as your org chart, headcount plans, performance reviews, and compensation data. That means goal progress carries real organizational context. Leaders see alignment, momentum, and risk at a glance. Managers walk into 1:1s already knowing where things stand. No chasing updates. No guessing.

Access Goals from the main navigation.



The Goals page is the central place to view, track, and understand goals across the organization. It brings strategy, execution, and accountability into one shared view.

Five tabs give you different lenses into the same goal data: **All**, **Organizational**, **Personal**, **List**, and **People**. All five share a common set of controls at the top of the page.

Shared controls

- **Time slider** - scrub across a date range (2019 to 2031) to view goals active during any period. The current date is shown by default.
- **Filter** - narrow goals by people, groups, or attributes. The filter badge shows how many active filters are applied.
- **Find people, groups, or enter query** - search for specific people or groups to focus the view.
- **Search goals** - search by goal name within the current tab.
- **Create Goal** - available from any tab. Opens the Create Goal modal.

The total number of goals visible in the current tab is shown below the tab bar.

All tab

The default view when opening Goals. Shows all goals across the organization - both Organizational and Personal - in a single list grouped by category. Parent goals are expandable to show their child goals. Each row displays the goal label, owner, supporters and groups, confidence, progress, sensitivity, and end date.

Organizational tab

Filters to Organizational Goals only. Shows the same hierarchical expand/collapse structure as the All tab, with parent goals and their sub-goals nested beneath them. Use this tab to focus on company, department, and team-level objectives.

Personal tab

Filters to Personal Goals only. Shows individual-level goals in a flat list. Use this tab to review goals that aren't part of the organizational hierarchy.

List tab

A flat list of all goals regardless of type or hierarchy. Parent goals and sub-goals appear as separate rows. This view is designed for fast scanning across all goals at once, identifying which are off track, and filtering to what matters most. Columns are the same as the All tab.

People tab

Organizes goals by person. Every person in the organization appears as a row, showing their name, title, manager, department, and goals across four columns: **Goals** (total count), **Owned Goals**, **Supporter Goals**, and **Group Goals**. Goal names are visible inline within each column.

This view highlights accountability and workload. Use it to prepare for 1:1s, understand goal distribution across teams, and identify where individuals may be over or under-allocated. A grid/list toggle in the top right switches between display formats.



Visual Indicators

Two visual signals appear consistently across goal lists throughout ChartHop:

- **Progress** - shown as a percentage with a colored bar. Purple bars indicate progress toward the goal target.
- **Confidence** - shown as a colored pill or dot. Labels and colors are configured by your admin in Goal Types, but the default scale runs from Off Track (red) through Mostly Off Track (orange), Partly On Track (amber), Mostly On Track (teal), to On Track (green). A "Success" state (green) indicates a completed goal.

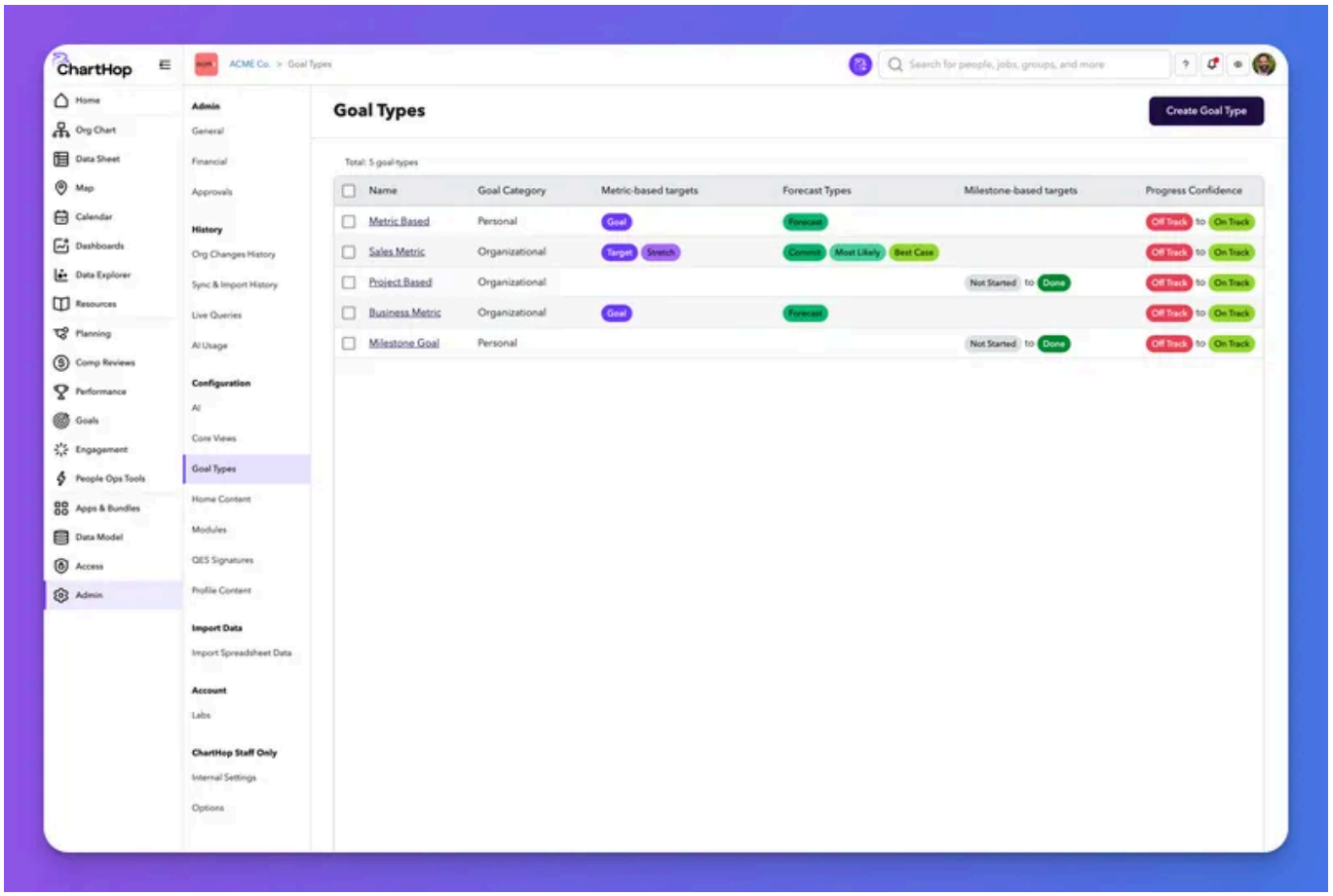
> **Modules:** HRIS | Engagement | **Goals** | Performance | Compensation Reviews | Headcount Planning

5.9.1. Goal Types

Goal Types define how goals behave across ChartHop. They control how progress is measured, how confidence is reported, how forecasting works, and how progress update reminders are sent.

Configuring Goal Types is the right first step before anyone creates a goal. The types you define determine what options users see when creating goals, what progress looks like across the platform, and how goal data is structured for reporting.

Navigate to **Admin > Configuration > Goal Types** to access this page.



Goal Types admin view

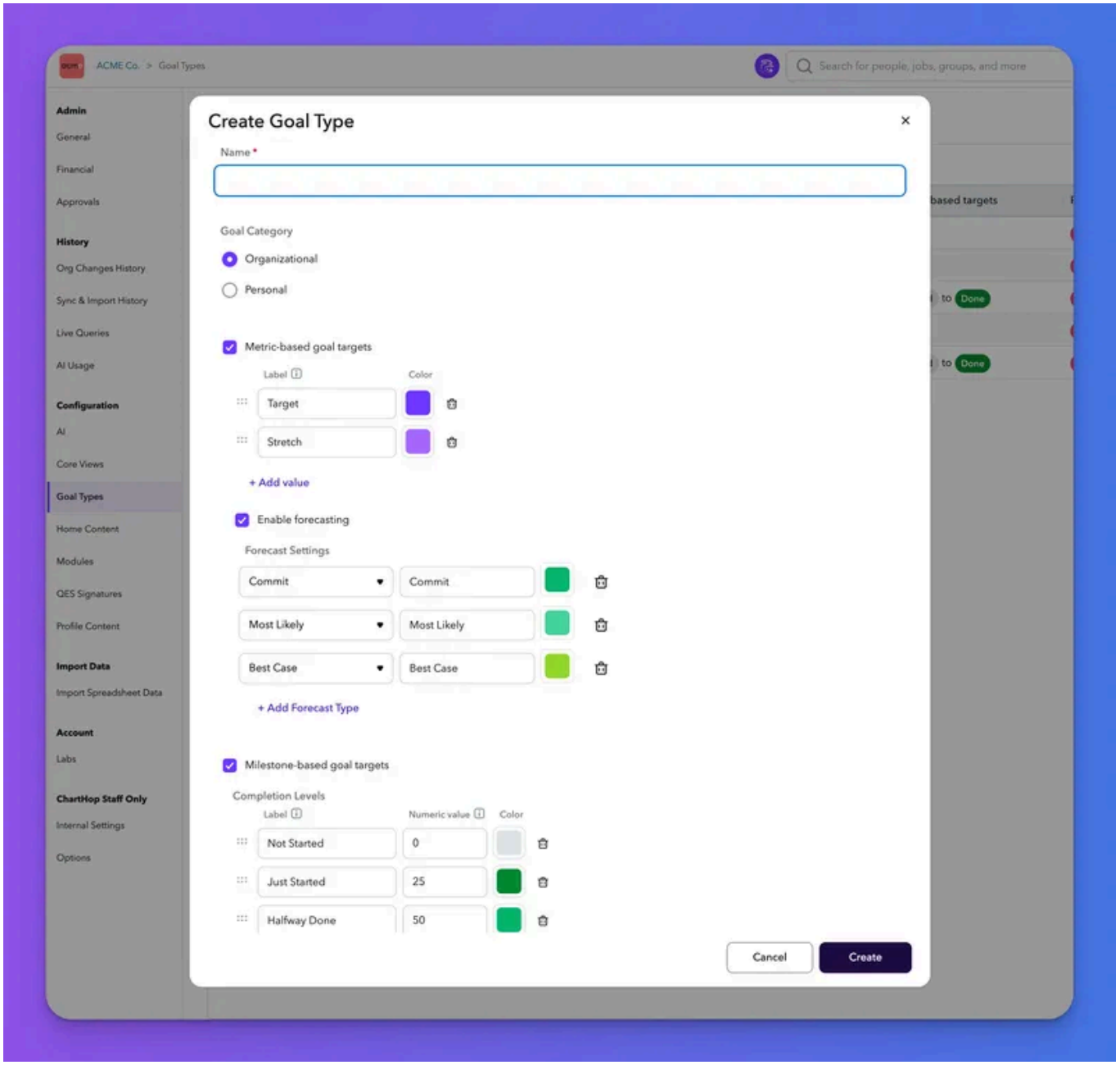
Goal Types admin view

The Goal Types page lists all goal types available in the organization. Each row shows:

- **Name** — linked, click to edit

- **Goal Category** — Organizational or Personal
- **Metric-based targets** — target level pills (e.g., Goal, Target, Stretch)
- **Forecast Types** — forecast level pills (e.g., Commit, Most Likely, Best Case)
- **Milestone-based targets** — milestone range (e.g., Not Started to Done)

Select **Create Goal Type** to add a new type.



Creating Goal

Creating or editing a Goal Type

Everything configured in a goal type applies to every goal created with that type. Changes to an existing goal type affect all goals using it, so update thoughtfully.

Name (required)

The label users see when selecting a goal type. Make it descriptive: Company Goal, Sales Quota, Project Initiative.

Goal Category

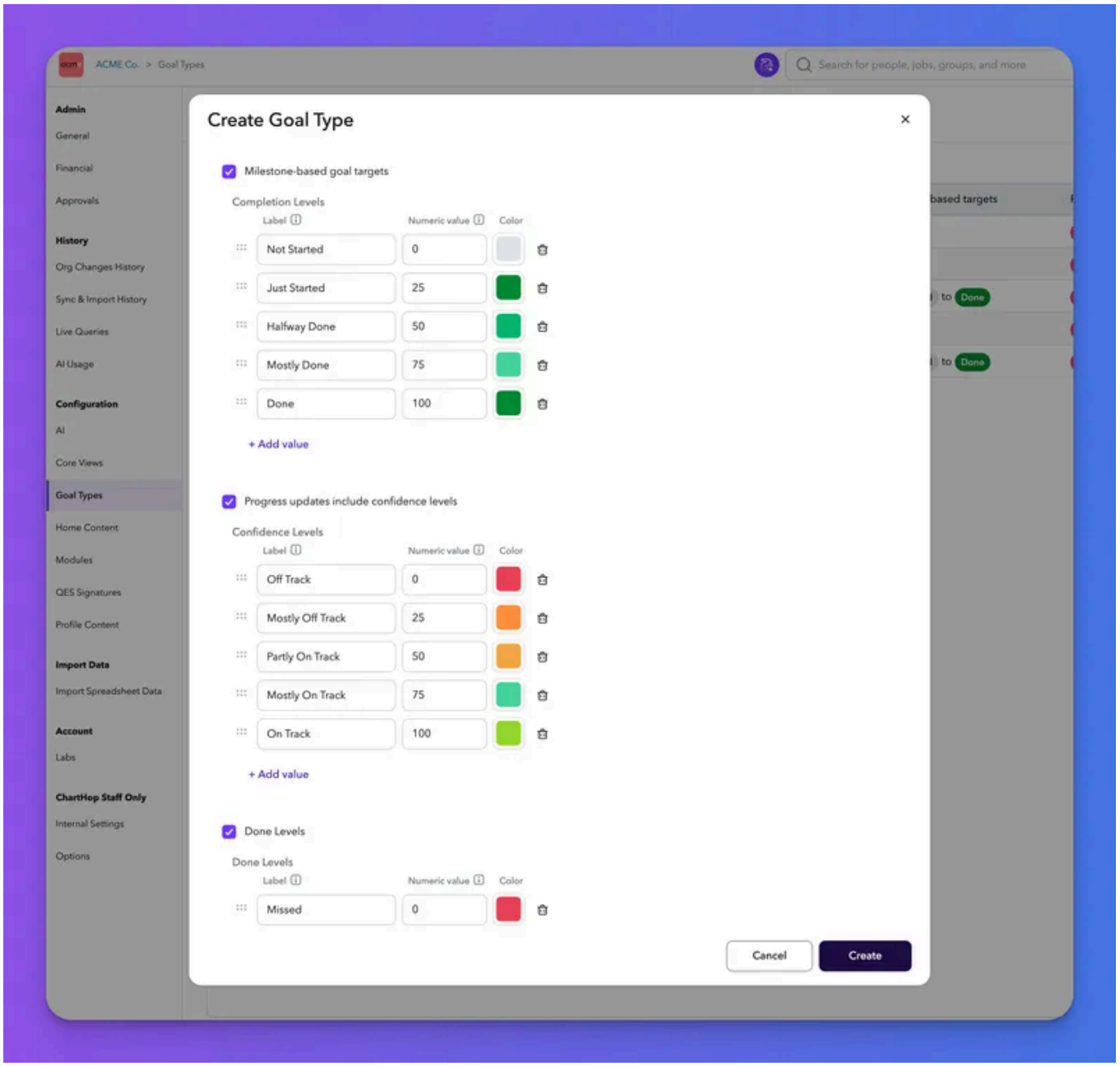
Radio button: **Organizational** or **Personal**. This determines which section the goal type appears under in the Create Goal dropdown. Organizational types are for company, department, and team-level goals. Personal types are for individual goals that aren't part of the organizational cascade.

Metric-based goal targets

Enable this checkbox to allow goals of this type to include numeric metrics. Define each target level with a label, color, and drag-to-reorder handle. Common examples: Goal, Target, Stretch, Base, Bunny. Select **+ Add value** to add additional target levels. These labels appear in goal metrics, charts, progress updates, and the sidebar throughout the product.

Enable forecasting

Enable this checkbox to allow forward-looking estimates on goals. Configure each forecast type with a type selector (Commit, Most Likely, Best Case), a label, and a color. Select **+ Add Forecast Type** to add more. Forecasting lets goal owners communicate expected outcomes, not just current performance, and drives the forecast lines visible in goal charts.



Milestone-based goal targets

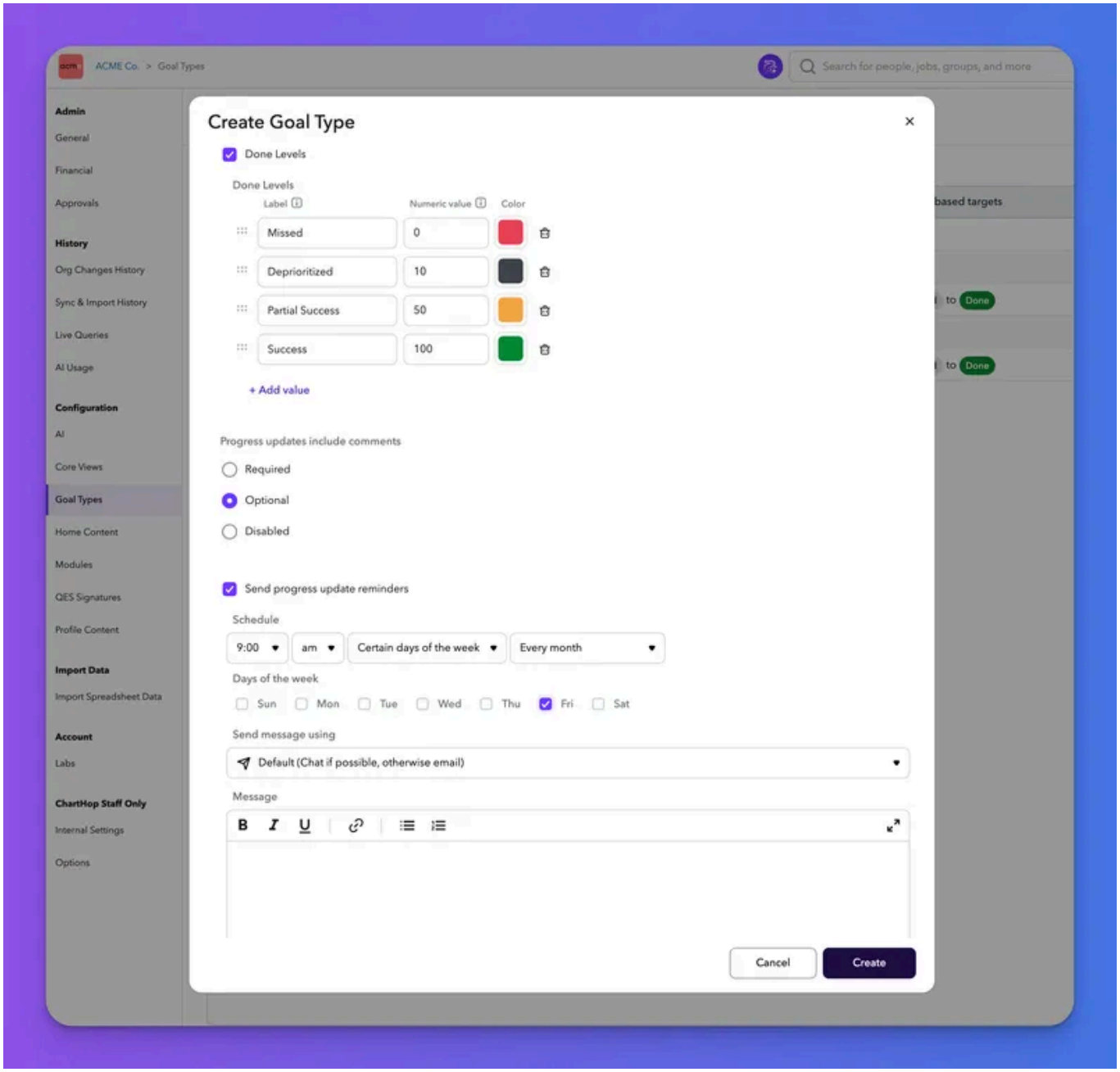
Enable this checkbox to track progress through completion stages instead of, or in addition to, numeric metrics. Define **Completion Levels** with a label, numeric value, and color. The numeric value is what drives visual progress indicators across the platform for milestone-based goals. A milestone at "Halfway Done" with a numeric value of 50 contributes 50% progress to the goal's overall progress bar. Set these values intentionally — they affect every progress bar users see in the Goals module, on profile pages, group pages, and in the Data Sheet.

Default completion levels: Not Started (0), Just Started (25), Halfway Done (50), Mostly Done (75), Done (100). Select **+ Add value** to customize.

Progress updates include confidence levels

Enable this checkbox to include confidence level selection in progress updates. Define each **Confidence Level** with a label, numeric value, and color. These levels appear as selectable pills in the progress update form and as colored indicators throughout the Goals module.

Default confidence levels: Off Track (0, red), Mostly Off Track (25, orange), Partly On Track (50, amber), Mostly On Track (75, teal), On Track (100, green).



Done Levels

Enable this checkbox to define how a goal is evaluated when it's closed. Define each **Done Level** with a label, numeric value, and color. This provides a consistent way to assess outcomes after a goal period ends.

Default done levels: Missed (0, red), Deprioritized (10, dark gray), Partial Success (50, orange), Success (100, green).

Progress updates include comments

Radio button with three options:

- **Required** — goal owners must write a comment with every progress update
- **Optional** (default) — comments are available but not required
- **Disabled** — no comment field appears in progress updates

Send progress update reminders

Enable this checkbox to automatically remind goal owners to submit progress updates. No separate Action or workflow setup is needed — reminders are configured directly within the goal type.

Configure the reminder schedule:

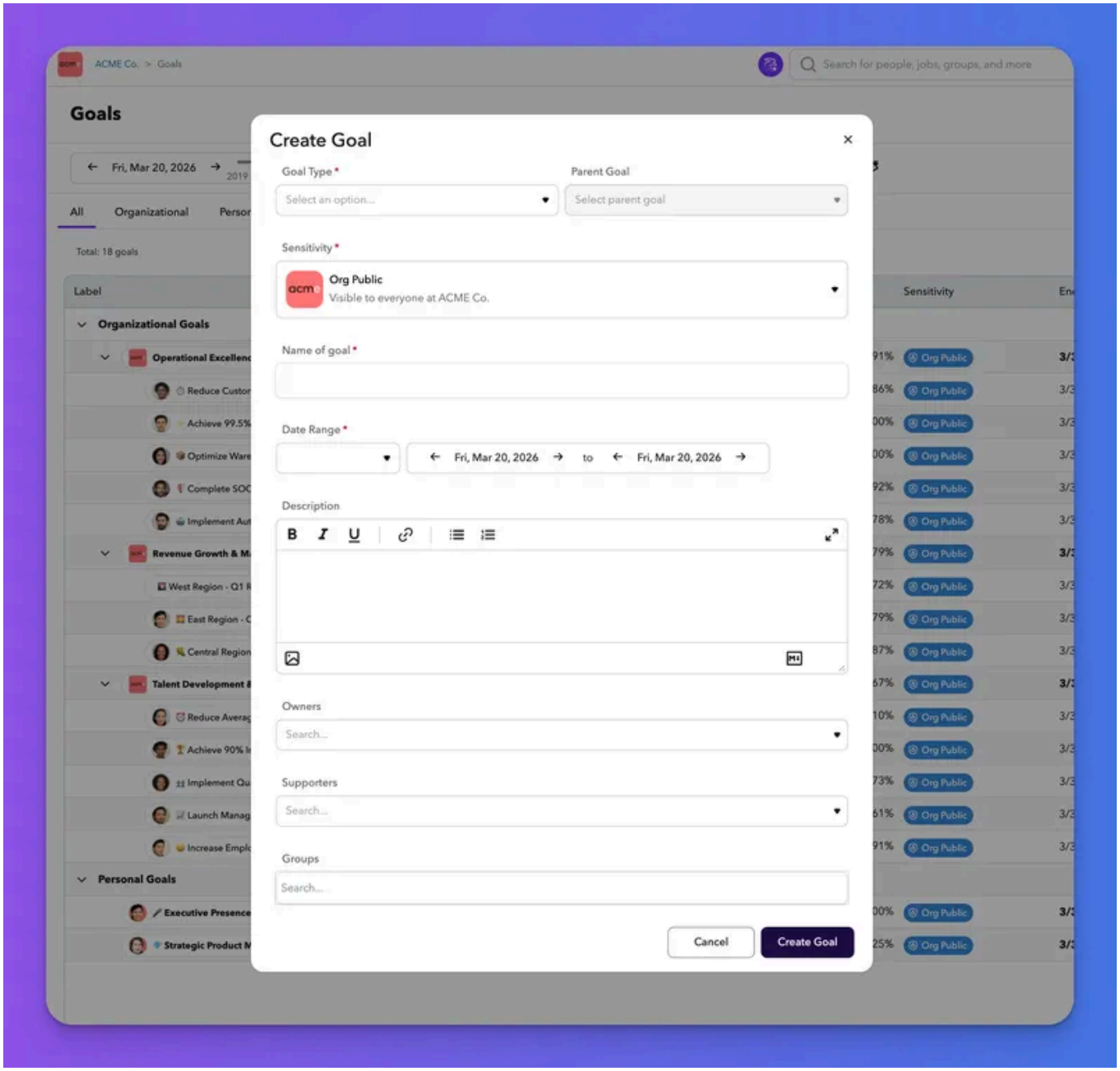
- **Time** — hour and am/pm
- **Frequency** — e.g., Certain days of the week
- **Recurrence** — e.g., Every month
- **Days of the week** — checkboxes for Sun through Sat
- **Send message using** — defaults to "Default (Chat if possible, otherwise email)"
- **Message** — rich text field for a custom reminder message body

Save

Select **Create** to save the goal type and make it available across ChartHop, or **Cancel** to exit without saving.

> **Modules:** HRIS | Engagement | **Goals** | Performance | Compensation Reviews | Headcount Planning

5.9.2. Creating and Managing Goals



Creating a goal

Select **Create Goal** from any tab on the Goals page to open the Create Goal modal. All fields marked with a red asterisk are required.

Goal Type (required)

Select from the goal types your admin has configured. Types are grouped into two categories: **Organizational** (company, department, and team-level goals) and **Personal**

(individual goals). The type you select determines how progress is tracked, which target levels are available, and whether forecasting and milestones are enabled.

Parent Goal

Link the new goal to an existing goal to place it in the hierarchy. Select **Top-level goal** to make it a root goal with no parent. If you're adding a sub-goal from within a goal's detail view, the parent is pre-filled automatically. You can change it.

Sensitivity (required)

Controls who can see the goal. Defaults to Org Public. Five options are available:

Sensitivity	Visibility
Org Public	Visible to everyone in the organization
Manager Shared	Visible to the person, their managers in the reporting line, and users with Sensitive access
Personal	Visible only to the person and users with Sensitive access. Not visible to managers without Sensitive access
Manager Only	Visible to managers in the reporting line and users with Sensitive access. Not visible to the person themselves
Highly Sensitive	Visible to org owners and users with access to view sensitive data

Name of goal (required)

The clear, outcome-focused statement of what the goal is trying to achieve. This name appears throughout ChartHop wherever the goal is referenced. Goals can include an emoji icon, which displays alongside the name in all views.

Date Range (required)

Start and end dates for the goal. Select a preset from the dropdown or set custom dates using the date pickers. Date range provides the time boundary for progress tracking, charts, and forecasting.

Description

Context for why the goal exists and what success looks like. Supports rich text formatting, links, images, and markdown.

Owners

The people accountable for tracking progress, updating confidence, and communicating status. Owners see this goal highlighted on their profile page. Every goal should have at least one clear owner. Search and select from all members of the organization.

Supporters

Contributors who help achieve the goal without owning the outcome. Supporters also see this goal highlighted on their profile page. Multiple supporters can be added.

Groups

Teams, functions, or departments associated with the goal. Groups tagged on a goal see it highlighted on their group page. Tagging groups also improves filtering and clarifies which parts of the organization are involved.

Save

Select **Create Goal** to save. Once created, the goal can be expanded with metrics, milestones, sub-goals, and progress updates.

Adding a sub-goal

Sub-goals break a larger goal into focused pieces of work. Each sub-goal has its own owner, confidence, and progress, making execution visible without losing alignment to the parent.

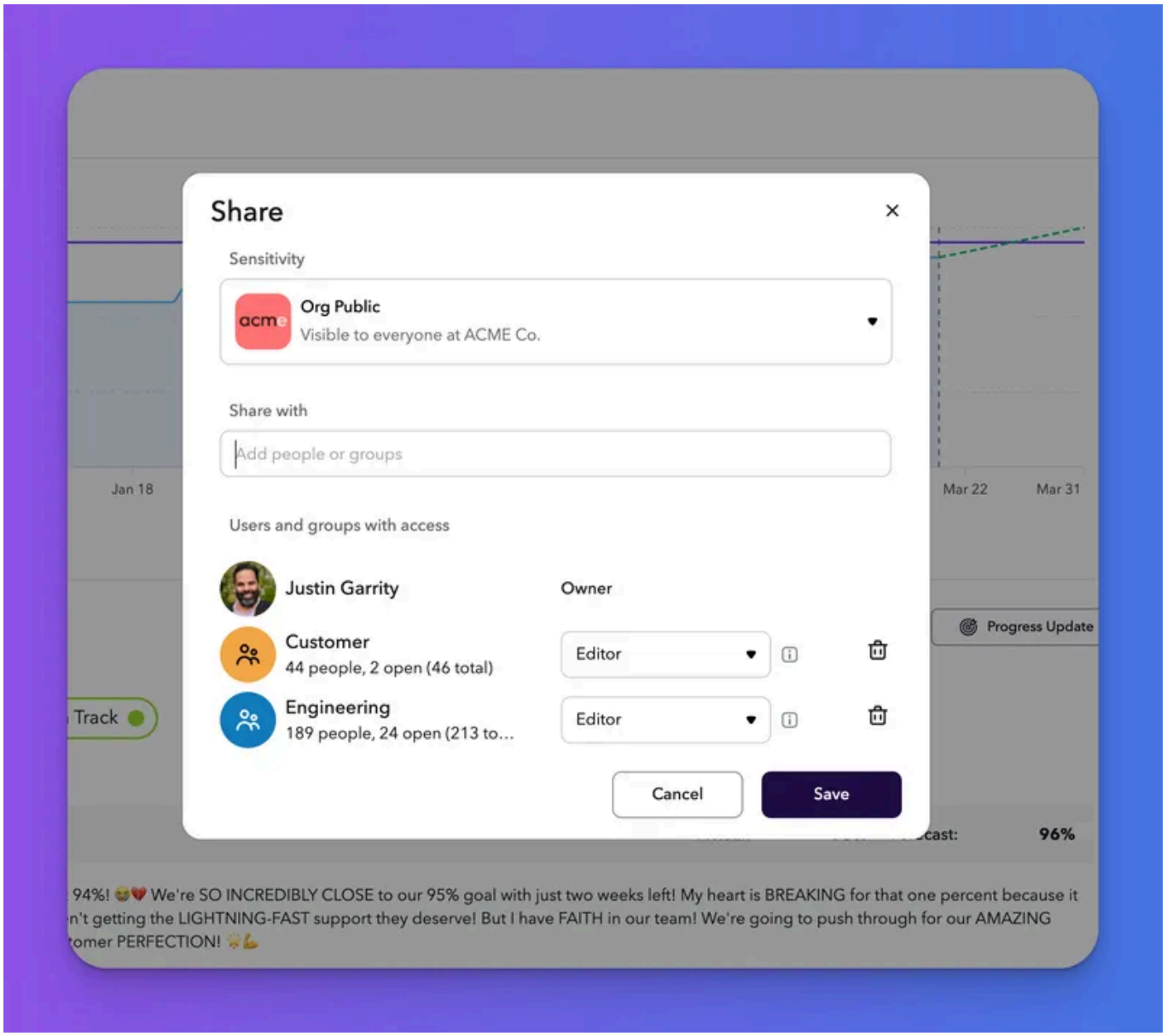
To add a sub-goal, open the parent goal's detail view and select **+ Sub-Goal** from the sidebar. This opens the same Create Goal modal with the parent pre-filled. All fields work the same way. Sub-goals are especially useful for cross-functional initiatives where multiple teams contribute to a shared outcome.

Editing a goal

Select **Edit Goal** from within any goal's detail view to open the Edit Goal modal. All fields are editable, including Goal Type and Parent Goal. Existing owners, supporters, and groups appear as removable pill tags.

Select **Save changes** to apply updates, or **Cancel** to exit without saving.

To permanently delete a goal, select **Delete Goal** in red at the bottom left of the Edit Goal modal.



Sharing and access

Select the pencil icon next to the sensitivity badge in the goal's top bar to open the Share modal.

The Share modal has two sections:

Sensitivity - change the goal's visibility setting. Selecting a new sensitivity applies it immediately across the platform.

Share with - add specific people or groups and assign them an access role:

- **Admin** - can create, edit, and manage the goal, including assigning owners.
- **Editor** - can update progress and add comments

Groups listed in the Share modal show their member count and open position count for reference.

Select **Save** to apply changes.

Custom calculation metrics and the goal creator

When a goal target uses a Calculation to calculate current progress - ChartHop evaluates that expression using the **goal creator's identity and permissions**, not the goal owner's or the viewer's.

This means the expression can access exactly what the goal creator can access, including any sensitive fields they have permission to see. It does not grant access to data the creator could not otherwise view.

The practical implication: **if a goal calculation relies on data that requires specific permissions to access**, the goal must be created by a user who has the appropriate access to that data. If the wrong user creates the goal, the expression may silently return no results or incorrect values.

> **Modules:** HRIS | Engagement | **Goals** | Performance | Compensation Reviews | Headcount Planning

5.9.3. Goal Targets

Every goal in ChartHop needs a way to measure progress. That's what targets are for. A target defines what success looks like for a goal - the specific outcome, number, or milestone that tells you whether you got there.

If you use an OKRs framework, targets are your **key results** - the measurable signals that tell you whether you achieved the objective.

Goals can have multiple targets. A single goal might track two metrics and three milestones at the same time, each with its own progress. ChartHop rolls these up into an overall progress percentage for the goal.

From the goal detail view, you add targets using two separate actions in the sidebar: **+ Add Milestone** and **+ Add Target Metric**. These represent two distinct ways of measuring progress.

Milestones

Milestones represent qualitative work that either gets done or doesn't. Use a milestone when success is defined by completing a specific thing rather than hitting a number - for example, "launch new pricing page", "complete compliance audit", or "roll out onboarding process to all managers".

Each milestone has:

- **Description** - what needs to be completed
- **Due date** - defaults to the goal's end date, but can be set independently to sequence work within the goal period
- **Status** - updated via progress updates (e.g., Not Started, In Progress, Complete)

Milestones are added inline directly on the goal detail page. A goal's overall progress accounts for how many milestones have been completed relative to the total.

Target Metrics

Target metrics track progress toward a specific number. Select **+ Add Target Metric** from the sidebar to open the Target Metric modal.

Metric type

Choose the type that matches what you're measuring:

Type	Use when...
Integer	You're tracking a whole number, e.g., number of customers, headcount, tickets closed
Money	You're tracking a currency value, e.g., ARR, pipeline, revenue
Percent	You're tracking a percentage, e.g., retention rate, quota attainment, NPS
Decimal	You're tracking a number that may include decimals, e.g., a ratio or score

Goal Direction

Set which direction represents progress:

- **Maximize** - higher is better (e.g., revenue, headcount, retention)
- **Minimize** - lower is better (e.g., bug backlog, churn, time to fill)
- **Closest** - as close to the target value as possible (e.g., a budget figure, a target ratio)

Target values

The numeric goal to hit. Depending on how your admin has configured the goal type, you may be able to set multiple target levels - for example, a Base target (minimum acceptable), a Goal target (expected outcome), and a Stretch target (aspirational). Each level gets its own value.

Starting value

An optional baseline to measure progress from. If left blank, ChartHop uses the metric's value at the goal start date as the baseline.

Manually entered vs. automatically calculated

Under **Goals calculated by**, choose how the current value gets tracked:

Manually entered - you or your team submit the current value as part of each progress update. This is the right choice when the data lives outside ChartHop, or when the metric requires judgment to calculate.

Automatically calculated - ChartHop calculates the current value automatically using a Carrot expression connected to your org's data. The Actual value in progress updates becomes read-only, updated on a recurring schedule. You only need to enter a Forecast.

Automatically calculated metrics are useful for goals tied to data already in ChartHop - for example, headcount, pipeline values from a connected Salesforce integration, or support ticket counts from Zendesk.

> **Automatically calculated metrics use the goal creator's permissions.** The calculation runs using the identity of the person who originally created the goal, not the goal owner or the person viewing it. If the expression relies on data that requires specific access - for example, data visible only to certain roles - the goal must be created by a user who has that access. Changing goal owners does not change whose permissions are used. See **Creating and Managing Goals** for more detail.

Multiple targets on one goal

A goal can have any number of targets, and milestones and metrics can be combined freely. Each target tracks independently.

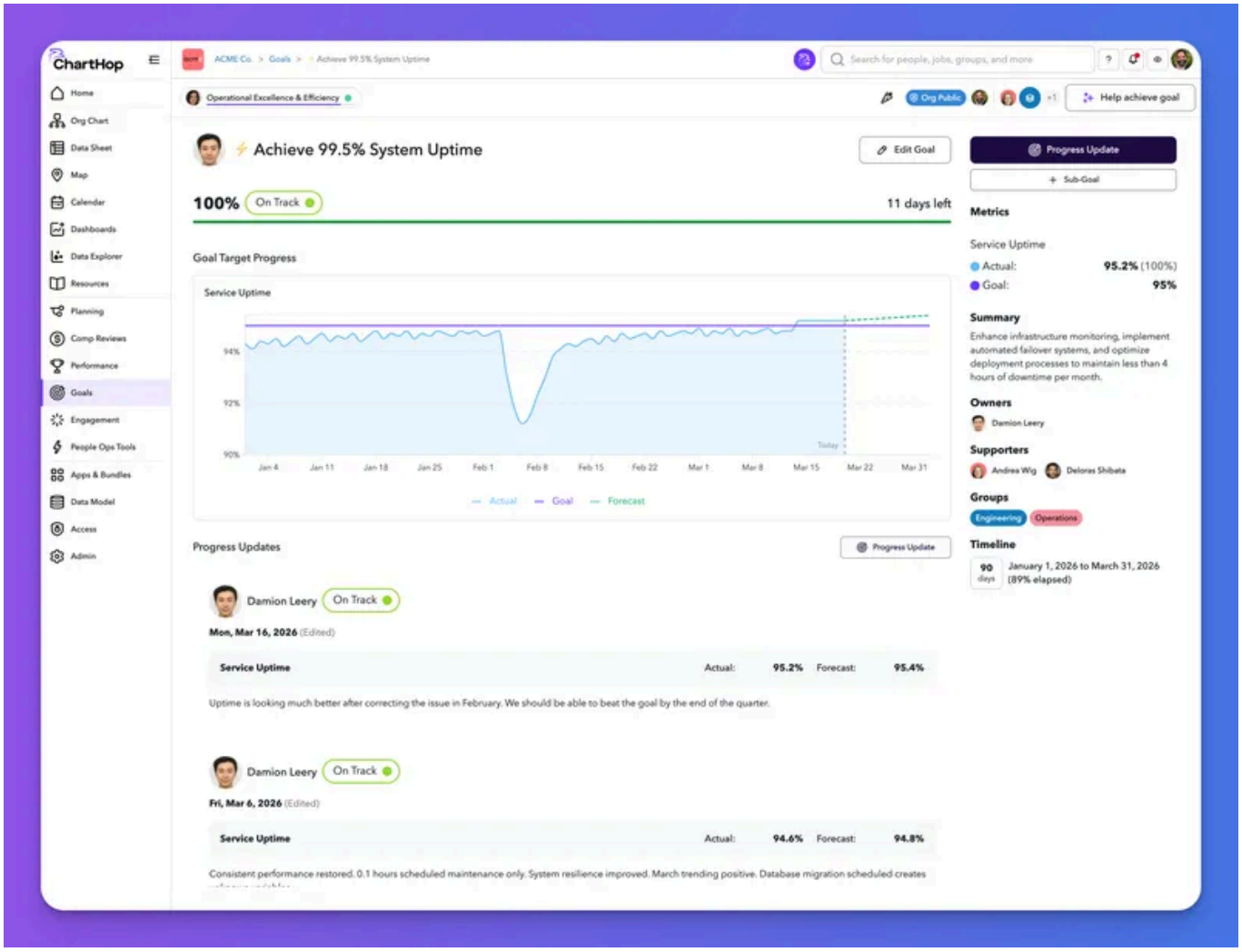
When a goal has multiple metric targets, each appears as its own tab in the progress chart in the goal detail view, and as its own row in the progress update form. Overall goal progress is the average completion percentage across all targets.

Use multiple targets when a single number doesn't fully capture success. For example, a goal to "improve customer health" might combine a retention rate metric, an NPS metric, and a milestone to complete a customer segmentation project.

> **Modules:** HRIS | Engagement | **Goals** | Performance | Compensation Reviews | Headcount Planning

5.9.4. Goals Detail View

The goal detail view is where a single goal comes fully into focus. It brings together context, ownership, progress, and evidence so teams understand not just what the goal is, but how it's doing and why.



Metric based Goal

Header

At the top of the page, a breadcrumb shows the goal's location: **[Org] > Goals > [Goal Name]**. If the goal has a parent, a pill below the breadcrumb shows the parent goal name and its current confidence dot. Selecting it navigates to the parent.

The top bar also shows:

- **Sensitivity badge** (e.g., Org Public) with a share icon to open sharing settings
- **Supporter avatars** with a count of additional collaborators
- **Help achieve goal** — lets you request to contribute to the goal
- **Edit Goal** — opens the Edit Goal modal

Progress and confidence

Below the header, the goal shows its current **progress percentage** and **confidence pill** side by side. A full-width progress bar sits below. On the right, a **days remaining** countdown shows how much time is left in the goal period.

Sidebar

The right sidebar provides context and quick actions throughout the detail view.

Primary actions:

- **Progress Update** (dark button) — opens the inline progress update form
- **+ Target Metric** — opens the Target Metric modal (appears on metric-enabled goals)
- **+ Milestone** — adds a milestone inline (appears on milestone-enabled goals)
- **+ Sub-Goal** — opens the Create Goal modal with parent pre-filled

Context fields:

- **Metrics** — lists each metric with Actual value (and progress %), Goal target, and additional target levels (e.g., Base, Bunny). Shown on metric-based goals only.
- **Summary** — a written description of the goal. On top-level parent goals, ChartHop may surface an AI-suggested description to help get started.
- **Owners** — avatars and names of goal owners
- **Supporters** — avatars and names of goal supporters
- **Groups** — colored department pills for each group tagged on the goal
- **Timeline** — date range with total days and percentage elapsed (e.g., "90 days — 88% elapsed")

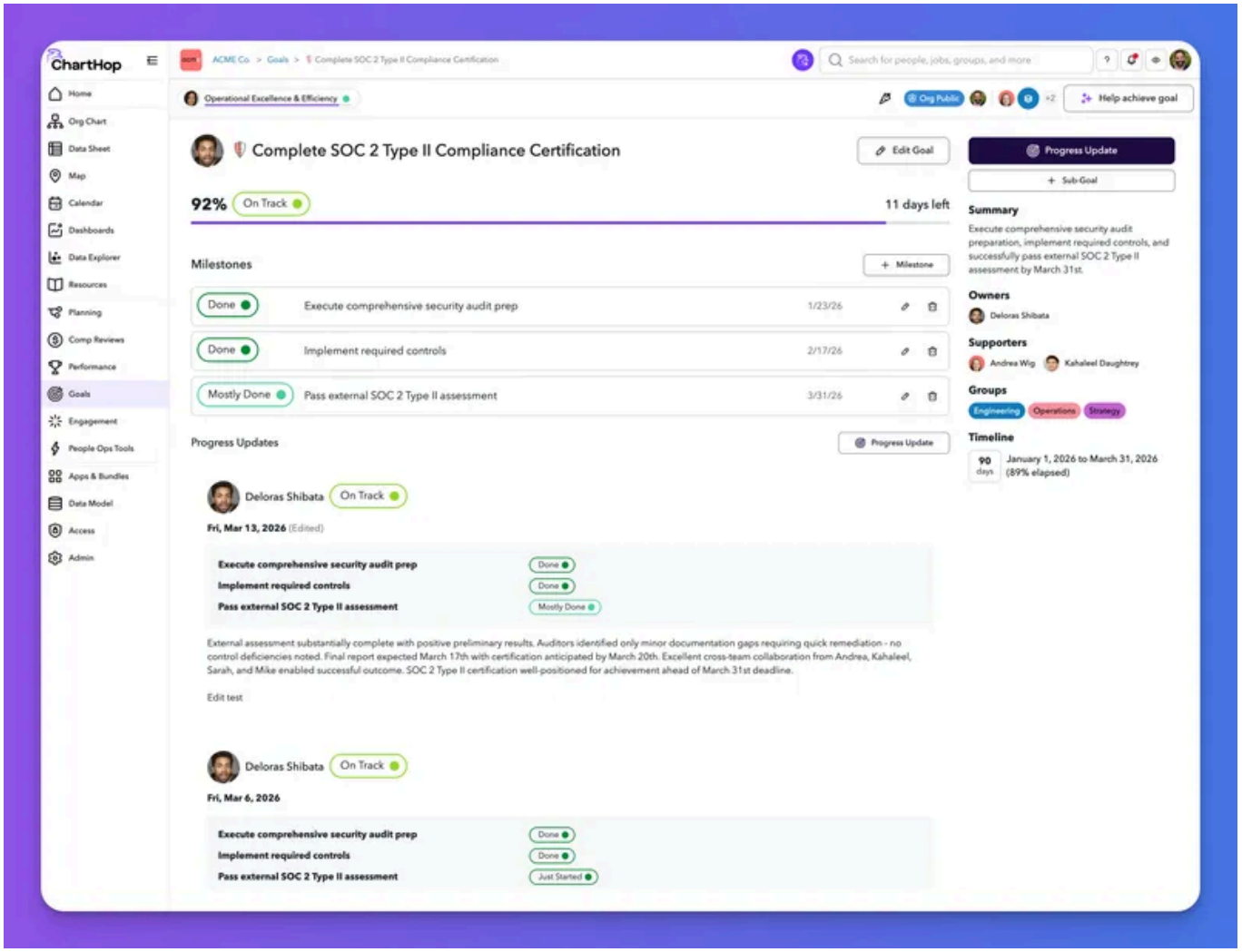
Goal Target Progress

For metric-based goals, a **Goal Target Progress** chart visualizes performance over time. When a goal has multiple metrics, tabs above the chart let you switch between them.

Each chart shows:

- **Actual** (solid light blue) — performance to date
- **Goal** (solid purple) — the target value
- **Forecast** (dashed) — the projected outcome
- Additional target and forecast lines as configured in Goal Types (e.g., Base, Bunny, Commit, Most Likely, Best Case)

A vertical dashed "Today" line marks the current date. The forecast line extends to the end of the goal period.



Milestone based Goal

Milestones

For milestone-based goals, a **Milestones** section replaces the progress chart. Each milestone row shows its status pill, description, due date, and edit and delete icons.

Select **+ Milestone** to add a new milestone inline — no modal opens. A new row appears at the bottom of the list with a description field and a due date that defaults to the goal's end date. Enter the description and confirm with the checkmark, or cancel with the × icon. Milestone due dates can be set independently to sequence work within the goal period.

To update a milestone's status, submit a progress update (see below).

Sub-goals

Sub-goals appear in a table within the goal detail view with columns for Name, Owners, Confidence, Progress, and Goal. Each row links to the sub-goal's own detail view. Select **+ Sub-Goal** from the sidebar to add one.

Progress Updates

Progress updates are the narrative layer of the goal. The update form opens **inline** within the goal detail page — not in a modal. The rest of the page stays visible and scrollable, so you can review metrics, milestones, previous updates, and sidebar context while composing a new update.

For metric-based goals, the update form includes:

- **Update Date** — defaults to today, editable for backdating
- **Metrics table** — one row per metric showing Metric name, Actual, Goal, and Forecast
    - For automatically calculated metrics: Actual is read-only (pulled from the connected data source). Enter a Forecast value.
    - For manually entered metrics: Actual is an editable field. Enter both Actual and Forecast values.
- **Overall Confidence** — select one: On Track, Mostly On Track, Partly On Track, Mostly Off Track, Off Track
- **Mark Goal as Done** — checkbox to close the goal from this update
- **Comment** — rich text field for narrative context (required, optional, or disabled per goal type configuration)

For milestone-based goals, the update form includes:

- **Update Date** — defaults to today, editable
- **Milestones** — each milestone listed with a status dropdown to update independently
- **Overall Confidence** — same five-option selector
- **Mark Goal as Done** — checkbox
- **Comment** — rich text field

Select **Submit** to save the update. Updates are timestamped and preserved over time, creating a living record of decision-making. Each previous update shows the author, date, a confidence pill, a snapshot of all metric or milestone values at the time, and the written comment.

Adding a Target Metric

Select **+ Target Metric** from the sidebar to open the Target Metric modal. This is where you define what is being measured on a metric-based goal.

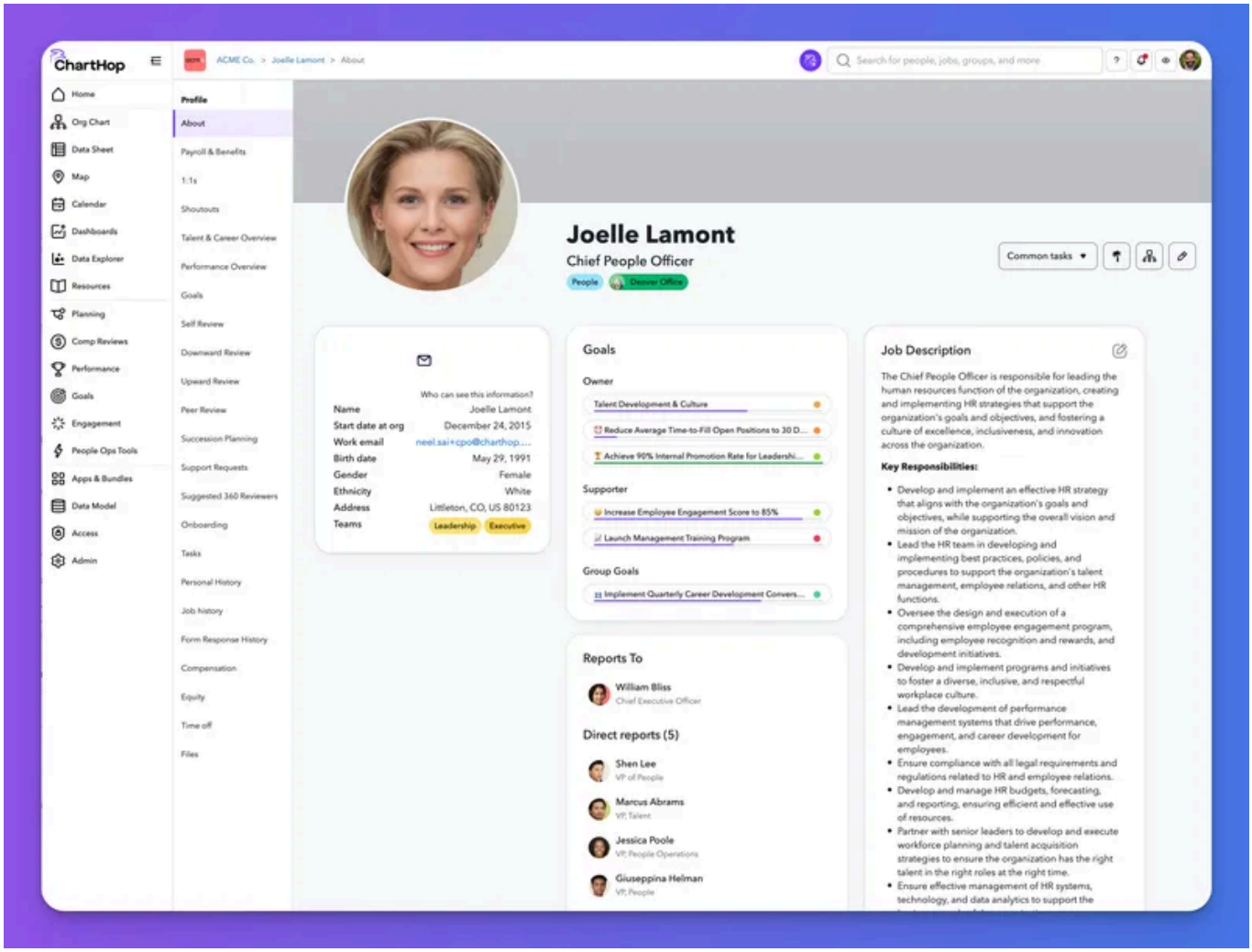
Field	Description
Label	The name of the metric, e.g., "Service Uptime" or "Monthly Active Users"
Type	Integer number, Money, or Percentage
Goal Direction	Maximize (higher is better), Minimize (lower is better), or Closest (as close to target as possible)
Target Values	Set the numeric target for each level configured in the goal type (e.g., Goal: 95)
Goals calculated by	Manually entered, or Automatically calculated
Carrot Expression	Appears when Automatically calculated is selected. Enter a Carrot expression referencing a Data Model table, e.g., db.goalsMetrics.metric['Support'].value. See the Carrot reference for syntax guidance.
Starting Value	Optional baseline value for progress calculation

Select **Target Metric** to save. A goal can have multiple metrics of mixed types — some automatic, some manual. Each appears as its own tab in the progress chart and its own row in the progress update form.

> **Modules:** HRIS | Engagement | **Goals** | Performance | Compensation Reviews | Headcount Planning

5.9.5. Goals Across ChartHop

Goals aren't siloed in the Goals module. Because ChartHop is a unified platform, goal data surfaces automatically wherever people and groups are referenced. No extra configuration is needed — assign an owner, supporter, or group to a goal and it appears in the right places immediately.



Profile page with Goals

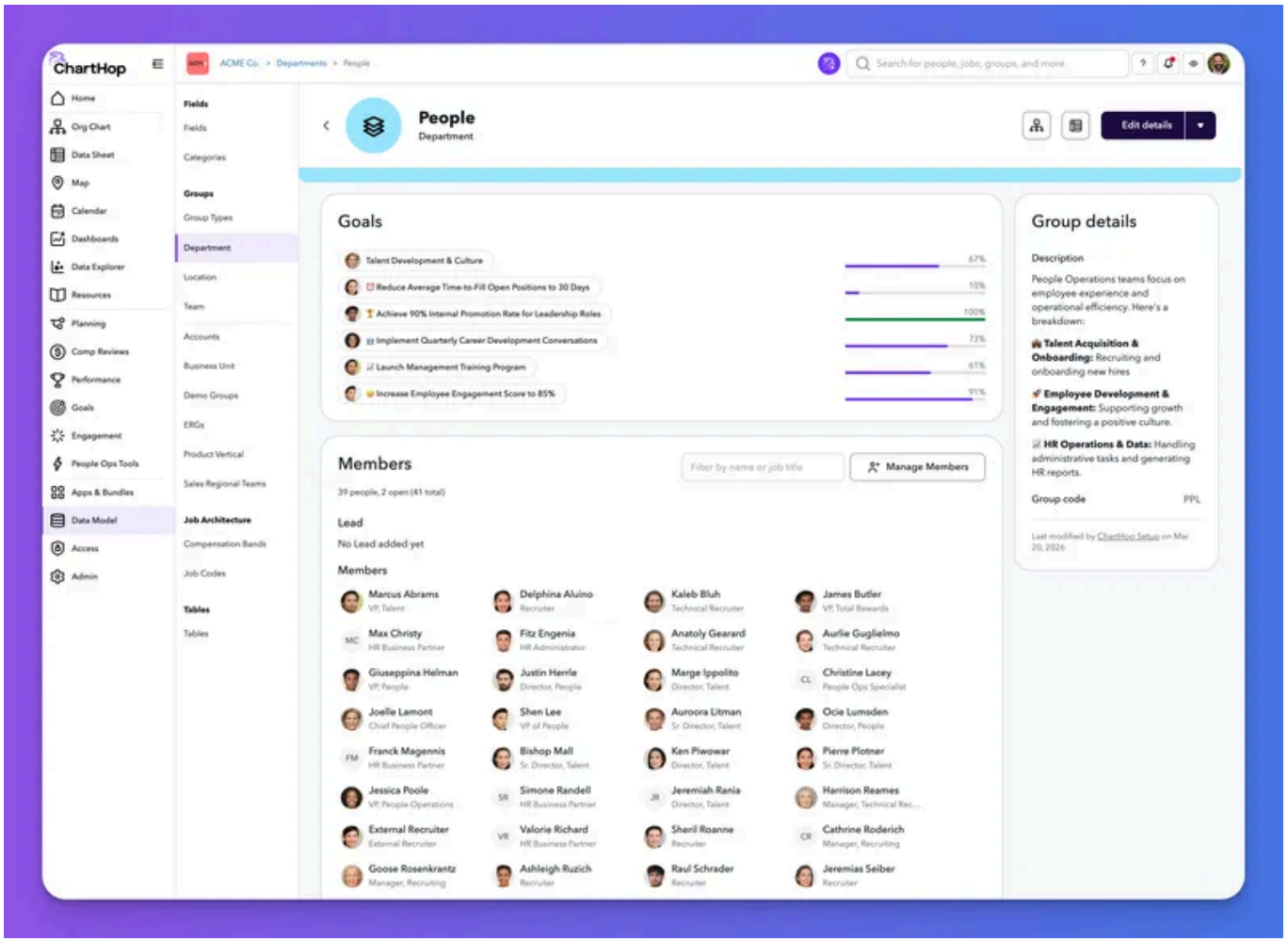
Profile pages

Every person's profile page shows a Goals card on the About tab. The card is divided into three sections: **Owner** (goals this person owns), **Supporter** (goals they support), and **Group Goals** (goals associated with their groups).

Each goal displays as a chip with a purple progress bar on the left and a confidence dot on the right. At a glance, anyone viewing a profile can see both progress and confidence for every goal associated with that person — useful context before 1:1s and performance conversations.

Goals also has its own dedicated tab in the profile left nav for a full view of that person's goals.

Visibility respects sensitivity settings. What a viewer sees depends on the goal's sensitivity level and their access permissions.

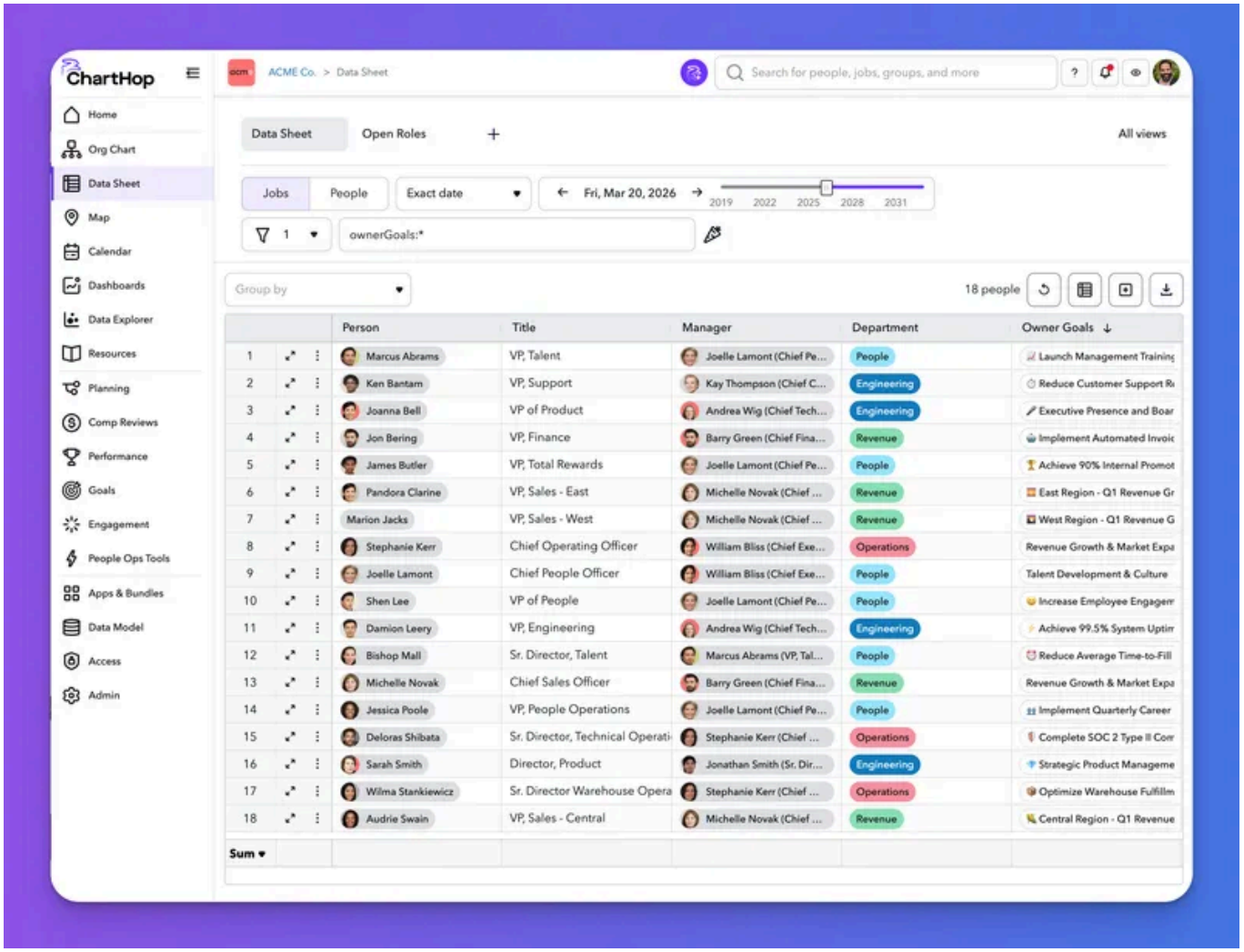


Group page with Goals

Group pages

Every group page shows a Goals card listing all goals tagged to that group. Each goal displays with a purple progress bar and percentage. Progress bars are full-width within the card, making it easy to compare progress across goals at a glance.

Department leads and team managers get instant visibility into all goals touching their group without navigating to the Goals module.



Data Sheet

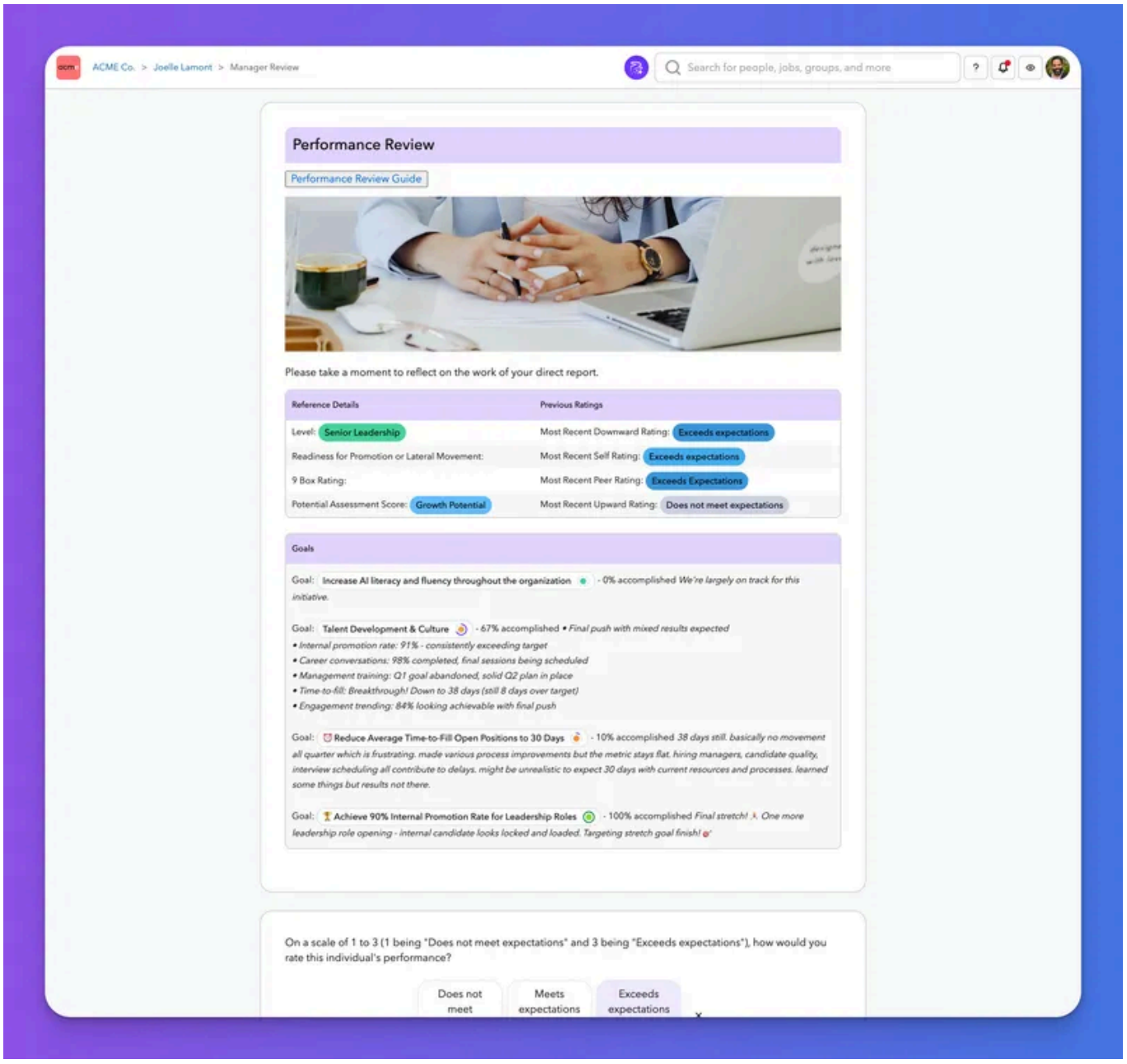
Goal data is available as a native field type in the Data Sheet, queryable with Carrot expressions just like any other people data.

Useful filter expressions:

- ownerGoals:* — people who own at least one goal
- supporterGoals:* — people who support at least one goal
- groupGoals:* — people associated with at least one group goal

In Data Sheet views, each goal appears as a chip with a purple progress ring around the owner avatar and a confidence dot on the right. This lets People Ops teams build custom

views that cross-reference goal progress with department, level, manager, tenure, or any other field in the platform.



Performance form with Goals

Performance reviews, forms, and custom pages

Goals data is available anywhere in ChartHop that accepts HTML and Carrot markup — including performance review forms, resource pages, and custom profile tabs.

The findOwnerGoals() Carrot function pulls a person's owned goals for a specified date range:

```
{% for goal in findOwnerGoals(date('-6m'), 'today', person) %}  Goal:
{{goal}} - {{goal.percent / 100}} accomplished
  <i>{{goal.progress.comment}}</i>
{% endfor %}
```

This renders each goal with its name, progress percentage, and most recent progress update comment. Wrapping it in a table with ChartHop's standard styling produces a Goals reference section that appears inline within a review form — giving managers full goal context without leaving the review.

Available goal fields include goal (name), goal.percent (progress), and goal.progress.comment (latest update narrative). See the Carrot reference for the full list of available goal fields and functions.

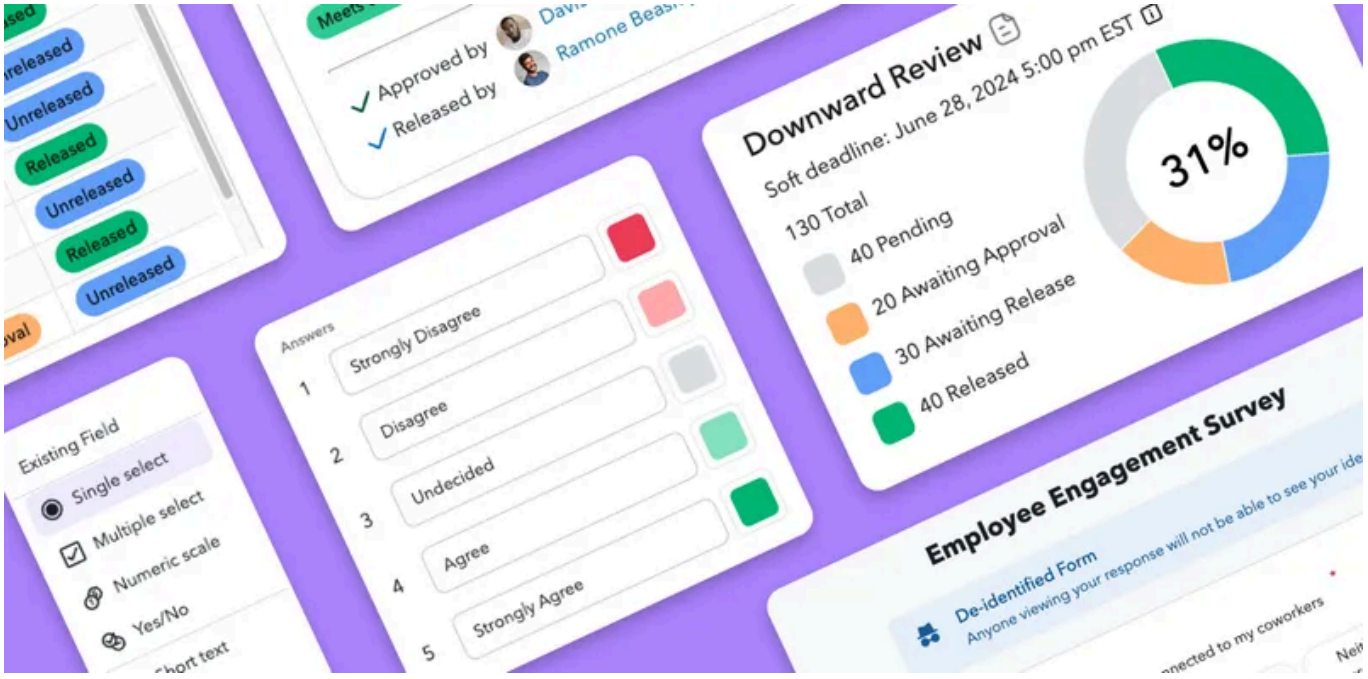
That's the full updated documentation across all five pages. A few things to flag before publishing:

1. **"Admin" rename** — the Share modal currently shows "Owner" for the admin-level sharing role. The docs above use "Admin" with a note explaining the rename is coming. Update that note once the rename ships.
2. **Carrot goal fields** — I documented the fields visible in the screenshots (goal, goal.percent, goal.progress.comment). Worth having engineering confirm the full list before the Carrot reference is updated.
3. **"Automatically calculated" integration setup** — I noted it requires a Carrot expression referencing a Data Model table but kept it general. If there's a standard setup guide for connecting Salesforce/Zendesk to goalsMetrics, that deserves its own sub-page or a link from the Target Metric section.

> **Modules:** HRIS | Engagement | **Goals** | Performance | Compensation Reviews | Headcount Planning

5.10. People Ops Tools

5.10.1. Forms



Forms are a foundational piece of people operations processes. From **onboarding** to weekly 1:1s to **Performance reviews**, **Engagement surveys**, and **Shoutouts**, they are often the best way to collect information, feedback, or requests from your employees.

You might've turned to Google or Microsoft Forms for quick tasks or used disparate systems for performance and engagement. ChartHop forms allow you to centralize all the workflows in one system, alongside the rest of your people data.

Section overview

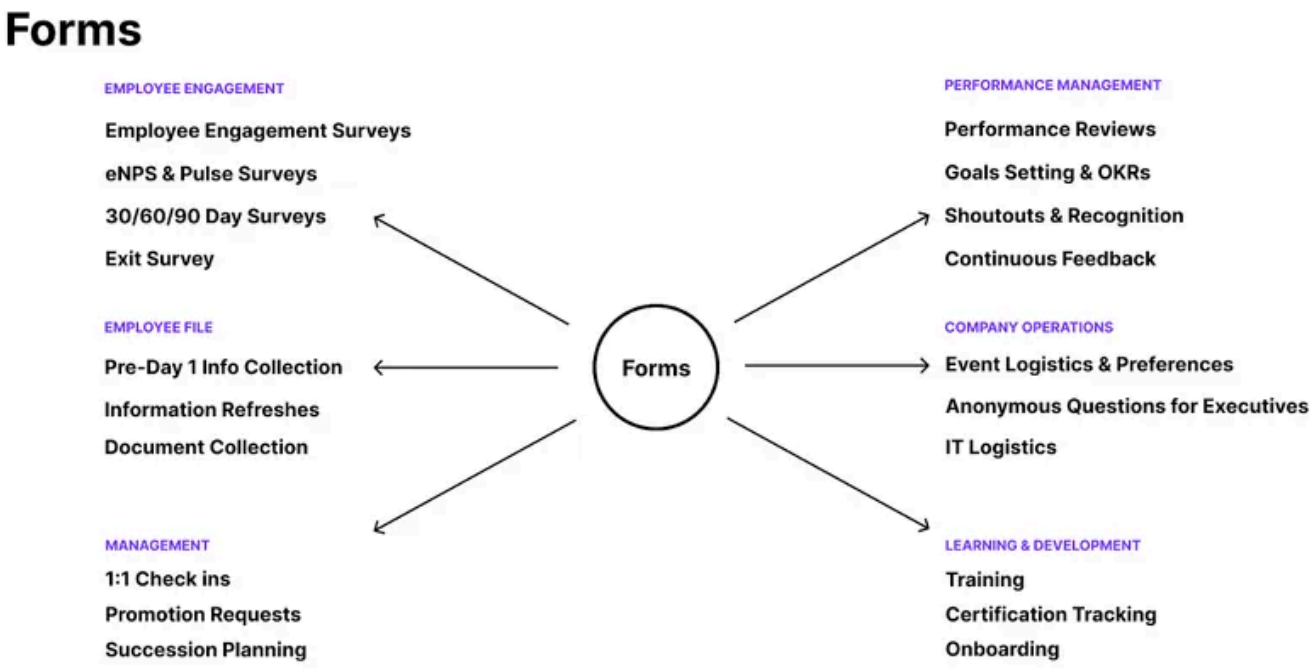
This section includes everything you need to know about:

- Creating a form
- Configuring form settings
- Anonymous and De-Identified Surveys & Forms
- Distributing forms
- Form responses workflows
- Form responses
    - Form Response Access & Visibility
    - Importing & Exporting Form Responses
- Sharing form responses with your organization

Forms Use cases

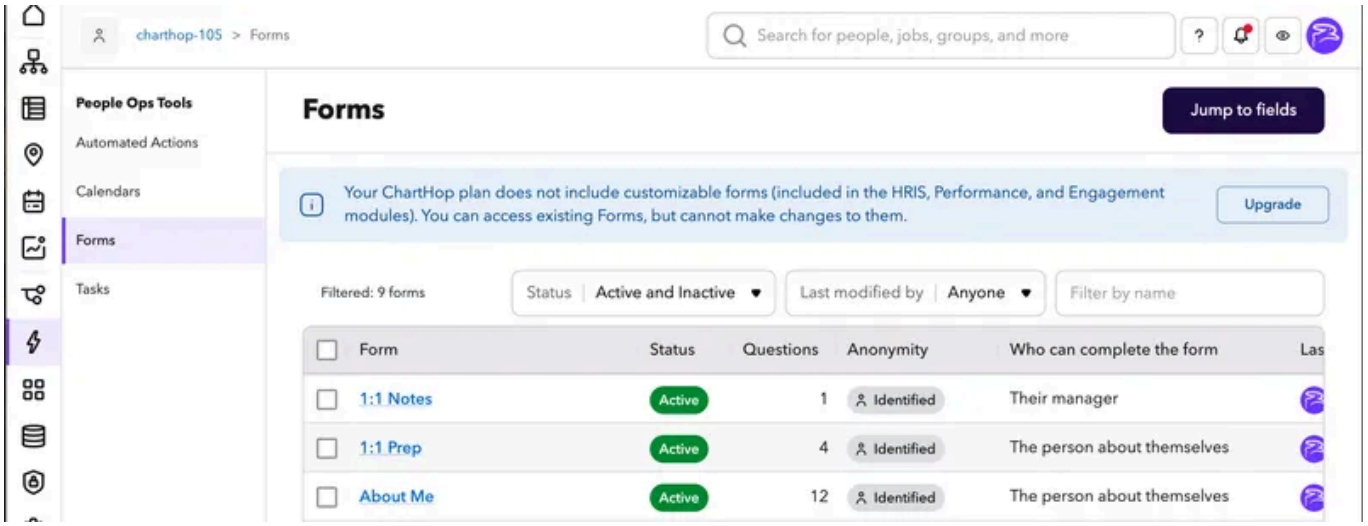
To see the best uses case of ChartHop forms. Take a look at the forms-related bundles:

Form Examples	HRIS	Performance	Engagement
About Me (Light Onboarding)	✔	✔	✔
1:1 Forms	✔	✔	✔
Shoutout (Recognition)	✔	✔	✔
Onboarding Buddy Program	✔		
Pre-boarding Forms	✔		
Onboarding information collection	✔		
360 Reviews (Peer, Upward, Downward, Self)		✔	
Direct Feedback (Hide identity)		✔	
Goal Setting & OKRs		✔	
Anonymous feedback			✔
Employee Engagement Survey			✔
Pulse Survey			✔
30, 60, or 90 Day Onboarding Survey			✔
Exit Survey			✔
Anonymous Executive Questions			✔



To view and complete forms, your employees must have access to ChartHop. For example, you can't send forms to contractors that don't access to ChartHop. See more about [inviting users to ChartHop](#).

View only forms



You may have view-only access to forms if you are a ChartHop customer with [ChartHop Basic](#) or have installed the [Lattice Integration](#) or another app that imports form data. With view only forms, you can view [form responses](#), but you cannot change anything about the forms.

Packages: Basic | **HRIS** | Headcount Planning | Compensation Reviews | **Performance** | **Engagement**

Roles: Owner | Technical owner | People Ops Admin

5.10.1.1. Creating a form

To create a new form:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Forms.**
3. Select **Create Form**.
4. Name your form by replacing the title (New Form)
5. Edit the default text block and question.
6. Select **Save**.
    1. The form will not be accessible to your users until you make it "Active"

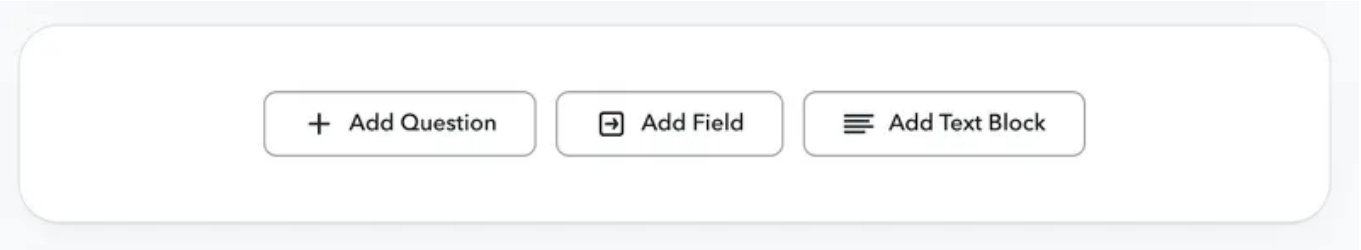
After saving your form, start building it by adding questions, field and text blocks.

> Roles with default access to Creating forms:
> **Roles**: Owner | Technical owner | People Ops Admin
>
> Any user may be given access to create forms using **Key Concepts: Role-based Access**

Building a Form

You can add 3 things to a form: **Questions**, **Fields**, or **Text Blocks**.

To add a Question, Field or Text Block, click the relevant button at the bottom or side



Adding Questions

Use a question if you do not need the answers to be used outside the context of the form. Most similar to how you would use a Google form.

Questions are great for:

- Fully Anonymous forms where you don't want to know whose answer it was
  - *Ex. What questions do you have for our executive team?*
- Quick forms where the information doesn't need to live on the respondent profile forever.
  - *Ex. What size would you like in this sweatshirt for your work anniversary gift?*
  - *Ex. Are you going to attend the team retreat?*
- Quick polls or surveys
  - *Ex. Who are you rooting for in the super bowl?*
  - *Ex. What should our rotating monthly office snack be?*

Responses to questions can be:

- Viewed as built-in graphs in the Summary within Forms, Surveys or Reviews
- Viewed in a table within Forms, Surveys or Reviews
- Viewed as individual responses within Forms, Surveys or Reviews
- Exported as a CSV
- Viewed on form responses on custom profile tabs
- (Roadmap) Use in custom dashboards - *Possible with help from ChartHop Team*
- (Roadmap) Pulled into the data sheet

> Questions can be converted into new fields before you have collected any information on them.
>
> However questions with responses cannot be migrated to fields.

> **Access to question responses:** Anyone with access to the Forms, Surveys or Reviews will have access to the form responses.
>
> Fields have a configured field sensitivity such as Org Public, Manager Shared or Private. Questions do not.

Convert a Field to a Question

There is not currently a way to convert a single field into a question.

If you have an existing form that was made using fields and you would like to convert to using questions you can use the **Duplicate and convert to questions** option:

1. Within a form, navigate to the split button in the top right corner.
2. Click the menu and select **Duplicate and convert to questions**
3. The form will be duplicated and all of the fields converted to questions.

Adding Fields

Use a **Fields** if you want to store the information on a person's profile or need to use the information in other places such as Scenarios, or Compensation Reviews.

Existing built-in or custom fields can be added to forms.

For example, you might have an Onboarding form that collects preferred name & T-shirt size as a field. That T-shirt size field can be later updated by an admin using the Data Sheet.

Fields and Forms Responses

Form responses are always preserved in their original state even if the value of the field is changed in a different context. For example:

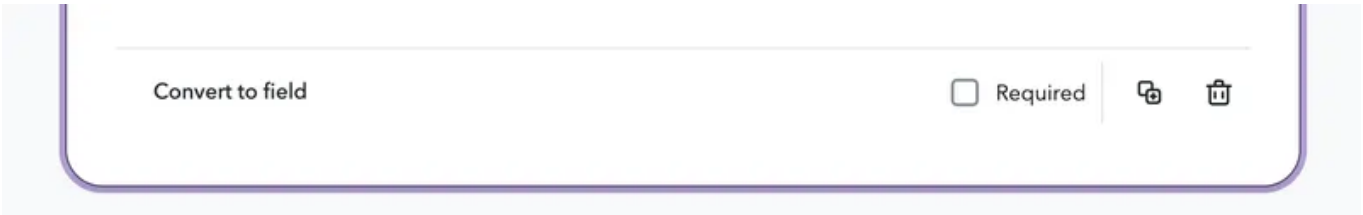
1. A T-shirt Size field is set as "M" in a form and stored on the field and the form response.
2. Later, the an admin uses the data sheet (or Integration, API or CSV import) to change the field to a "S".
3. The form response will still display "M" since that is what was submitted in the form while the field value will display "S."

Convert a Question to a Field

When building out a form, you are able to convert a question to a field before you collect information on the question.

1. Select the question.
2. Click the convert to field button if available

3. Fill out additional information about the field. All existing information from the question will be used to pre-fill the field information.



Adding Text Blocks

Text blocks allow you to add in instructions, guidance or context into your form.

For example:

- Add a text block at the start of the form to provide an overview
- Add a text block with a header to split up a long form (Using **Markdown formatting**)
- Add an image in the text block to provide needed context to the question
    - *Ex. An image of a T-shirt that is being purchased so that people get an idea for the size that would be best for them.*
- Add links to helpful resources related to questions
    - *Ex. Guidance on a performance management setup*

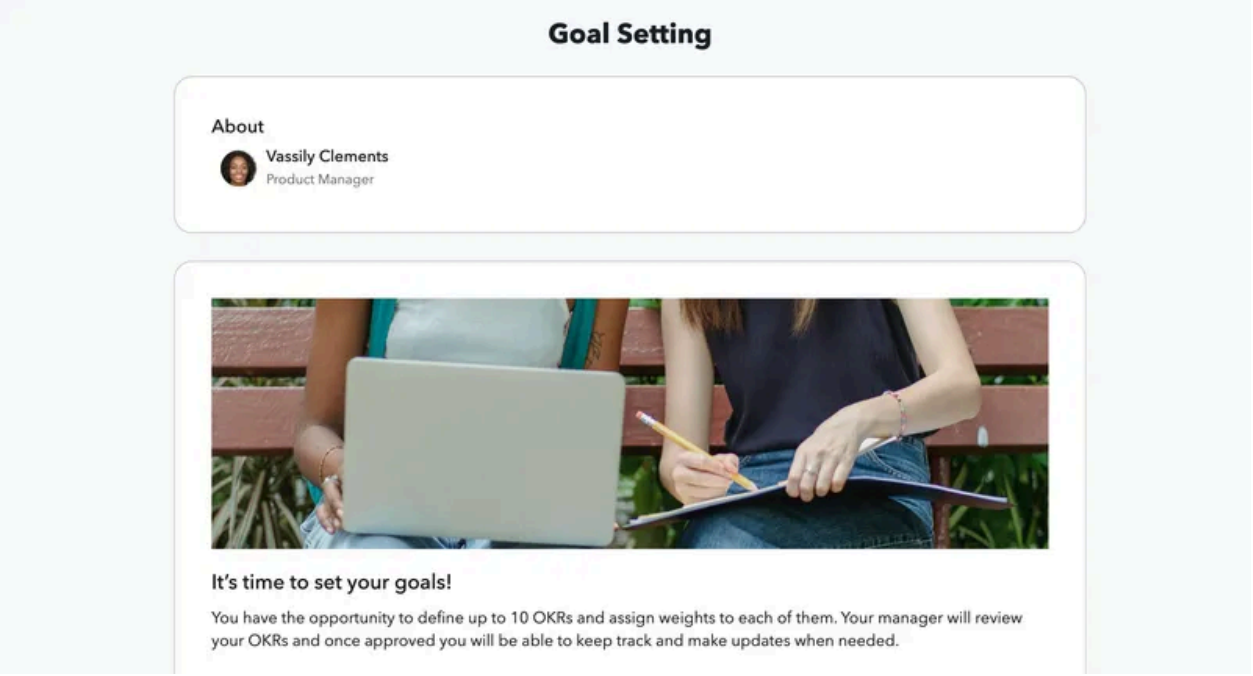


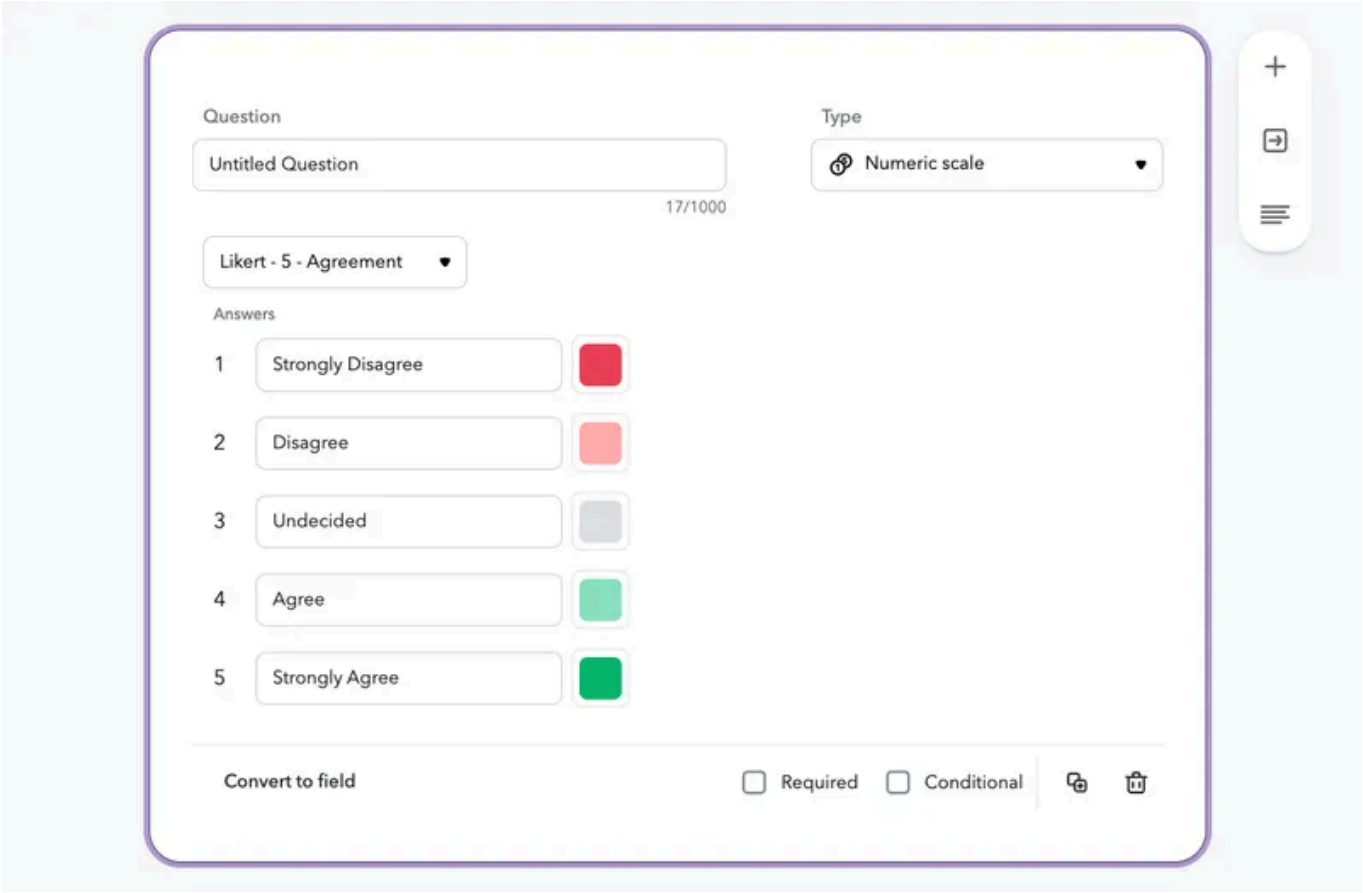
Image recommendations:

Images are a great way to make a form more engaging and dynamic. You can add an image to any text block.

Recommended image size:

- Minimum width: `800 px`
- 16:9 ratio: `800px by 450px`

Editing Questions & Fields



Once you add a question to a form, you can configure that question with the following options:

- **Question —** How the question is framed to someone answering it.
  (*ex. What questions do you have for our executive team?)*
  - Every time you use a Field in a form, you are able to specify a different question if you would like.
    - *What is your T-Shirt Size? → T-Shirt Size*
    - *We're ordering company shirts, please select your size → T-Shirt Size*
- **Required —** If the questions is required to complete the form.

- **Conditional —** If you would like to display the question to only certain people. See [Conditional questions & text blocks]
- **Type —** The format of the question. One of the following options:
    - Most question types will have additional configuration options such as the values in a multi-select or min or max values.



Duplicate a Question, Field or Text Block

1. Select the question, field or text block.
2. Click the duplicate button (two squares with a +).

Delete a Question, Field or Text Block

1. Select the question, field or text block.
2. Click the delete button (trash can).

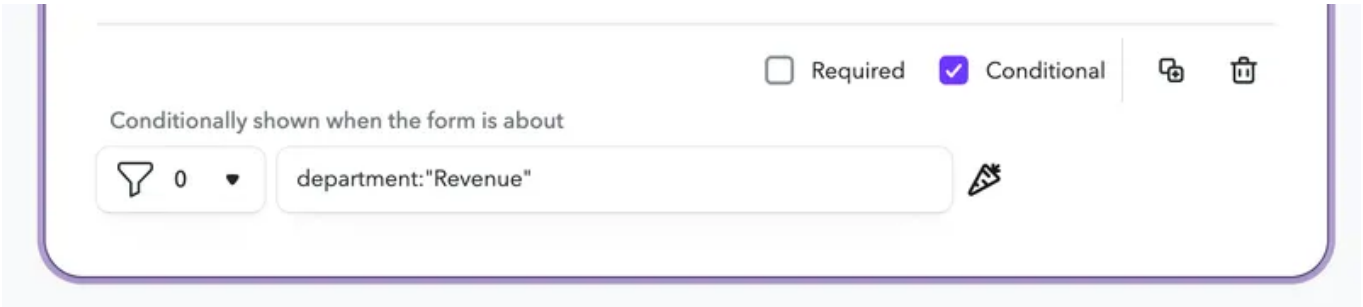
Reorder a Question, Field or Text Block

1. Select the question, field or text block.
2. Click the grab handle at the top and drag the question or field up or down in the form.

Conditional Questions & Text Blocks

Add a filter to any question or text block, so that the question will then only be displayed if the form is about a person who match that filters.

For example, adding a filter of `department="Revenue"` will only display the form to people who are in the Revenue department.



Conditional filter

1. Click the checkbox for Conditional
2. Type in your carrot filter or use the filter builder.
3. Click preview, then select a person that matches or doesn't match the filter to verify that it's working as expected.

There is also a way to configure conditional forms based on the response to previous questions. Please contact your CSM if you would like to configure this advanced option.

Display name

Forms have both a "Display name" and a "Form name" allowing you to use the best name to organize your forms and the best name to communicate to employees. The display name is shown to employees when they interact with the form.

For example:

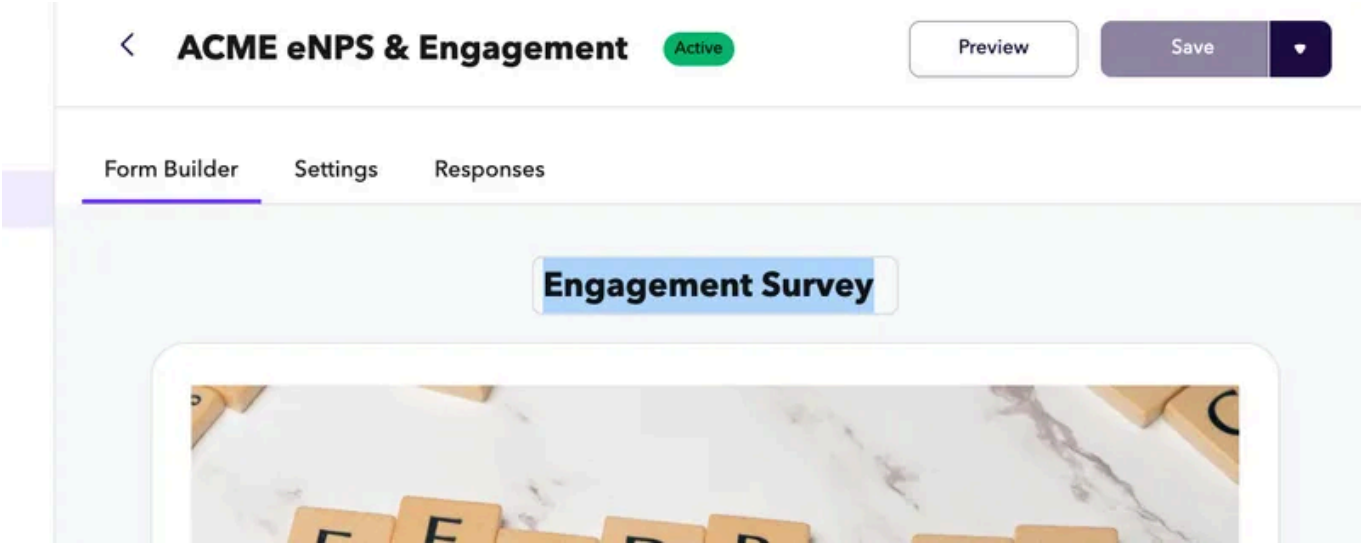
- Form Name: "FY24 - Emp Engagement - US"
- Display Name: "Employee Engagement Survey"

The display name will be used:

- In the notification & task to complete the form,
- In button that links to the form from the profile (More information in **Distributing forms**)
- At the top of the form.

To edit the display name:

1. Within the Form Builder tab
2. Hover over the **displayed name**, click and edit the name.

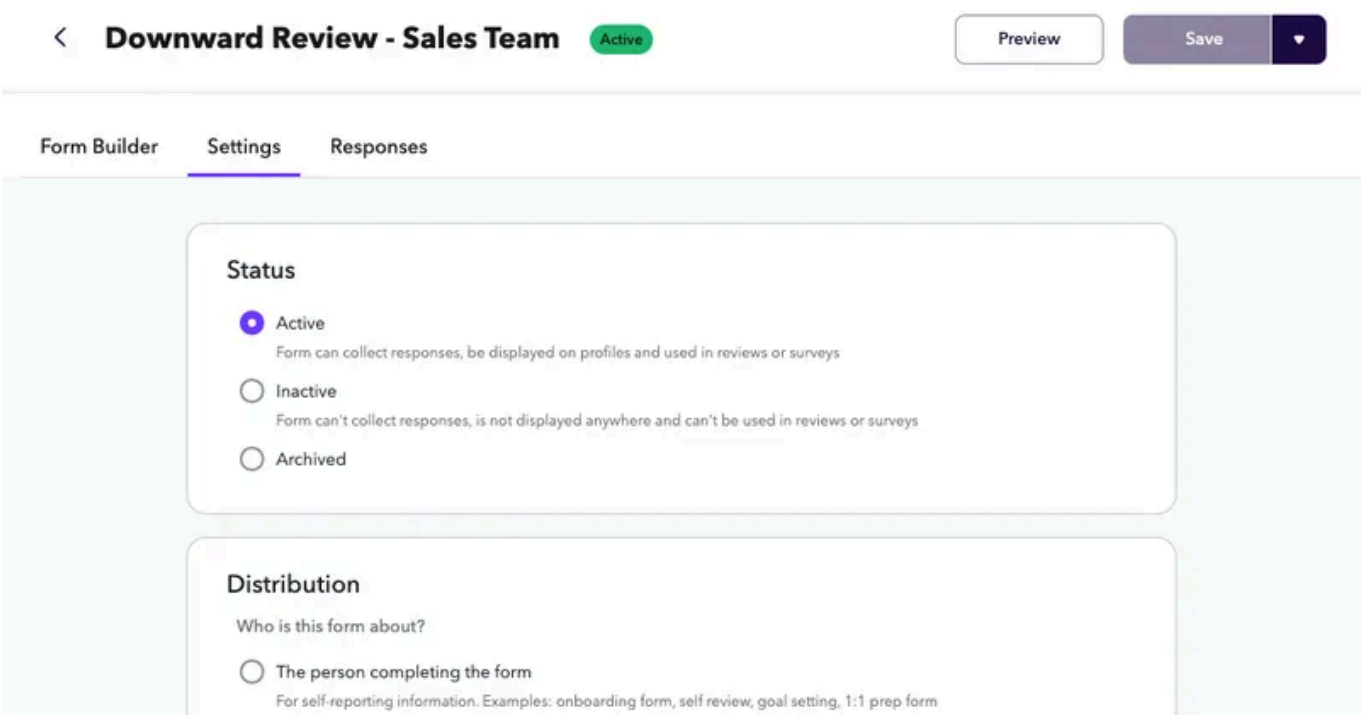


> **Roles**: Owner | Technical owner | People Ops Admin

5.10.1.2. Configuring form settings

Configure your form to meet your needs on **Settings** tab of your form. In the **Settings** tab, you can configure:

- If your form is accepting responses.
- Who you want to respond to your form
- Whether or not your form requires approvals
- Whether the identity of who responds to your form is visible
- Whether your form can be saved or edited after submission
- Email notifications for your form



Forms settings

To configure your form settings:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Forms.**
3. Select and open the form you want to configure.
4. Select the **Settings** tab. The Form Settings display.

5. Configure the form settings as needed. See the table below for descriptions of each form setting.
6. Select **Save & Exit** to save and apply your settings.

Form settings

The following form settings are available in the **Settings** tab:

Status

Setting	Description
Status	Indicates the status of the form. Select from the following statuses: * **Active** - the form is published and available for use. * **Inactive** - the form is unpublished and unable to collect responses. Leave this status set to **Inactive** until you're ready to distribute the form. * **Archived** - the form has been archived. Archived forms are not deleted, but are inactive and no longer displayed in the Forms list unless you filter specifically for Archived forms. **Learn more.**

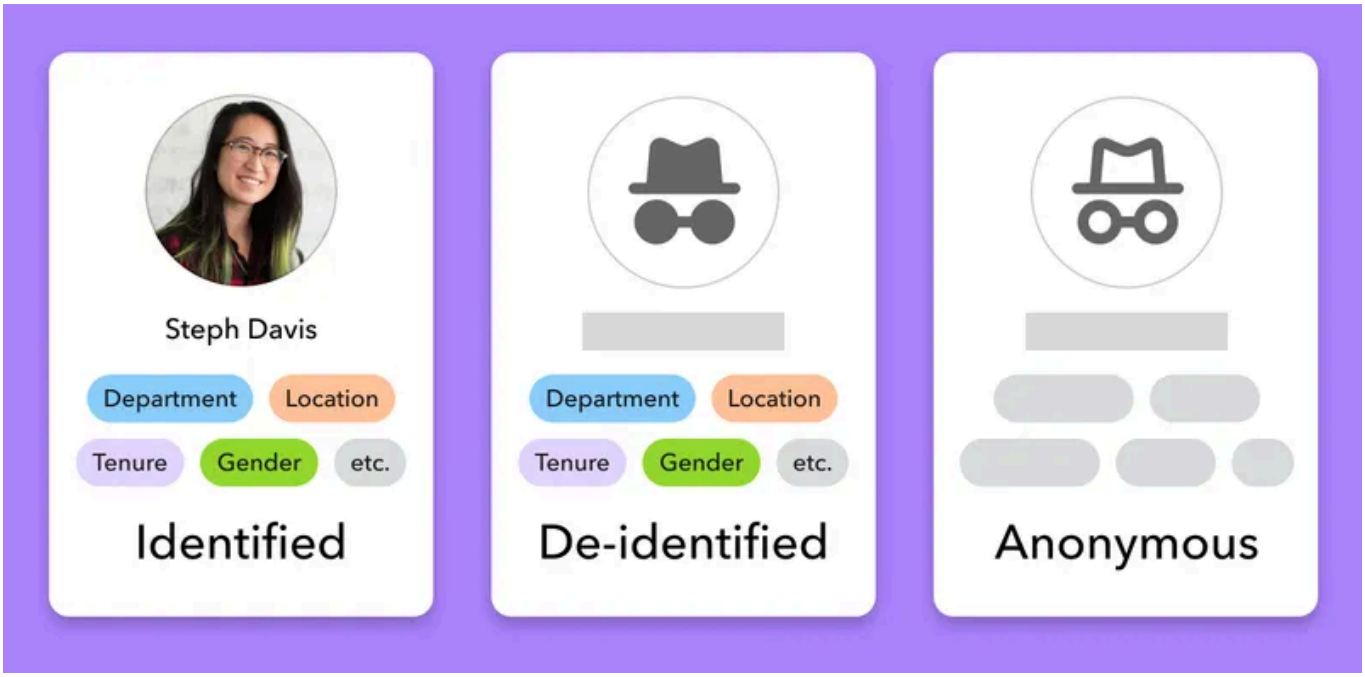
Distribution

Setting	Description
Who is this form about?	This setting determines **whose profile the form response is stored on**. Think of it as declaring the *subject* of the form — not who fills it in, but who the data is *about*. - **The person completing the form** — Use this when people are filling out a form about themselves. The response will be stored on the submitter's own profile. *For example, a self-review or an About Me form.* - **Another person** — Use this when someone is filling out a form on behalf of, or about, someone else. The response will be stored on the **subject's** profile — not the submitter's. *For example, a manager writing up a stay interview with an employee, a peer recognition form, or HR recording notes from a conversation with an employee. In all of these cases, the data should live on the employee's profile, so the form should be set to "Another person".* - **No one specifically** — Use this when you do not want to link the response to a specific person, such as an anonymous survey. :::hint{type="info"}
Key principle: The "Who is this form about?" setting controls where the data lives — not who submits it. If you want form data to appear on a specific employee's profile, set this to **Another person**, even if someone else (a manager, HR, etc.) is the one filling it in.	
:::	

Setting	Description
Who can complete this form?	Indicates the group of people who are eligible for filling out this form. When you use this form in a review, the respondent relationships defined in this field are applied to the employees made eligible in the review. **Learn more.** "The person" refers to the person who is going to complete the form. Select from the following options: - **Anyone in the org** — When anyone can fill out a form, even about themselves. - **Anyone else in the org** — Use this for when people need to fill out forms about people other than themselves. *For example, a shoutout or recognition form that I would fill out about a coworker.* - **The person or their manager** — Use this if the information in the form is about the person or their manager. *For example, a shared goal setting form.* - **Their manager** — Use this for a form completed by a manager. *For example, a downward review or manager's 1*:1 *form.* - **Their manager's manager** — Use this for a form completed by a manager's manager. *For example, a skip-level feedback form.* - **Their direct reports** — Use this for a form completed by the direct reports of the person. *For example, an upward review.* - **Users with sensitive access only** — Use this option for forms that include sensitive fields or responses. **Learn more.** *For example, HRBP private notes.* - **Selected peers** — Use this for a form completed by selected peers of the person. *For example, a peer review.* This option will prompt you to select a **Peers collection field**, which can be any person or persons field, to use as the source of the identified "peers".

Setting	Description
	- **Custom** — Use this if you have a use case where only a certain group of people can respond to the form. Use Carrot to select which group of people. **Learn more.** *For example, if you wanted the form to only be able to be completed by people on the sales team, you could write* `target.department="sales"` *or if you wanted to limit the form to people who are offboarding, you could use* `endDateOrg:*`*.*
Whose profile should this form automatically show up on?	At the top of each person's profile are buttons for filling out forms. See more information in **Distributing forms**. The buttons will appear only for the people previously selected in **Who can complete this form** and on the profiles of people determined by this setting: - **No one's profile, unless there is a pending task** — This is the default value and will not show on the profile unless you have a pending task to complete the form. Select this option for a form that you will be sending out with Reviews or Actions. *For example, if I need to complete a peer review for a coworker, I will see a "Peer Review" button on their profile but I will not see the button on the profile of other people at the company who I cannot complete peer reviews for.* - **Everyone's profile** — The button will appear on all people's profiles who the form applies to, which depends on what you have selected for "Who can complete this form". Select this option for a form that you always want accessible on the profile. *For example, a Shoutout form where you have selected "Everyone in the org except about themselves" for who can complete this form. This will show up on everyone's profile other than your own.* - **Only specific people's profiles (Custom)** — The button will appear on the profile of a subset of people

Setting	Description
	defined by you. *For example, a part-time employee hours submission that you only want to show for part-time employees. You would add* `employment:part` .



Access & Anonymity

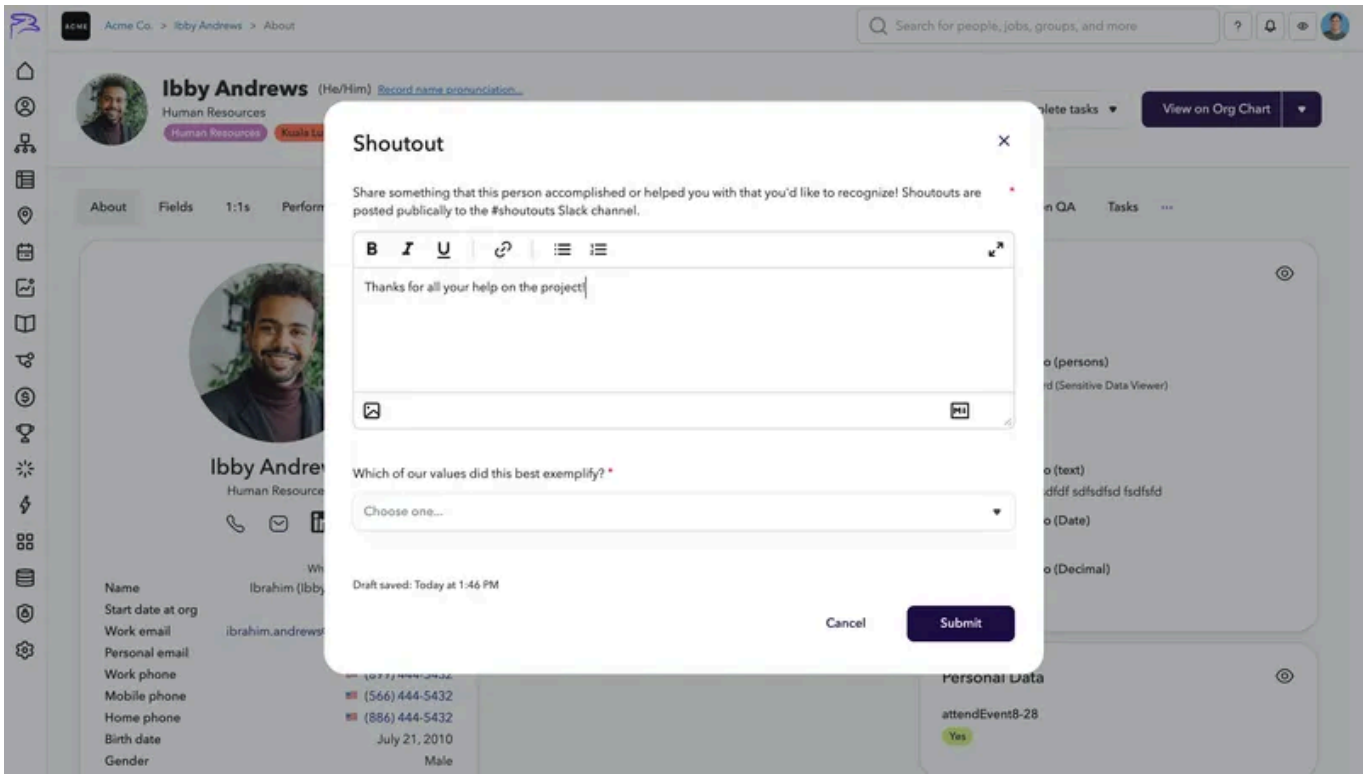
For full details on the three settings see: **Anonymous and De-Identified Surveys & Forms**

- **Identified** - Linked to a person and their demographic information
- **De-Identified** - Hide identity, but allow certain specific demographic information and limit reporting to be stored on the form response.
- **Anonymous** - Not linked to any personally identifiable information

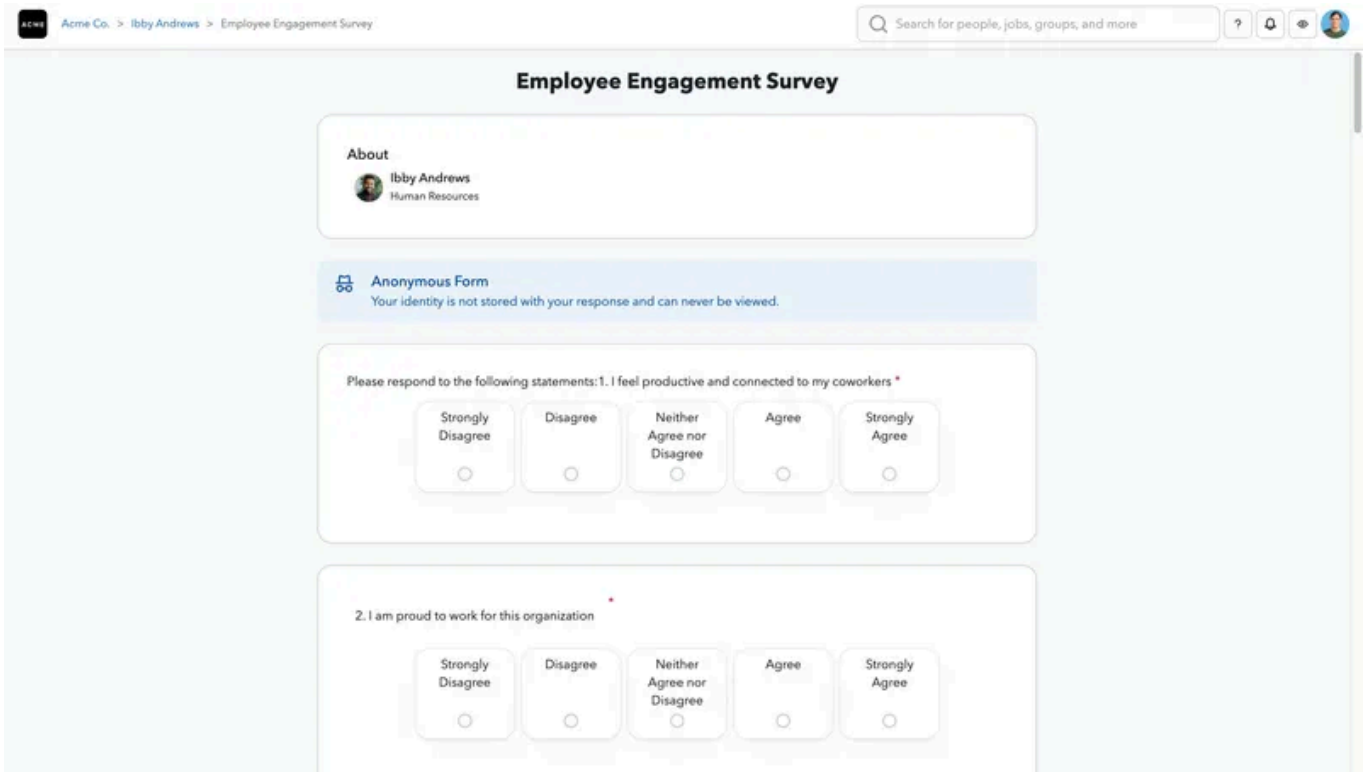
Setting	Description
Who can see the identity of the respondent?	This option is only available when **Identified** is selected and is only available to organizations with the Performance module. The main use case for this setting is to allow for a type of "Anonymous feedback" where the person receiving the feedback cannot see who gave the feedback, but their manager or admins can. The form response will still be linked to the individual. - **Anyone who can view the form response** — Default. Used in the majority of use cases. - **Managers in the person's reporting line** — Allows the manager of the person the form is about and users with highly sensitive access to see the identity. - **Users with highly sensitive access** — Only users with highly sensitive access can see the identity of the respondent.
Who can view the form responses?	The visibility of form responses depends on a number of factors that are detailed in Form responses. This setting enables certain special applications. - **Default** — Use this for the vast majority of cases. - **The person the form is about** — Allows the form to be viewable to the person the form is about, which is helpful when releasing a form response to an employee and not using fields. The response will not be viewable to them until it is released. - **Custom** — If you have a special use case then you may want to discuss a custom setting. Use with the help of ChartHop staff.

Form Completion

Setting	Description
Allow saving drafts	Determines whether respondents can save their form entries as drafts. When this is enabled, a **Save Draft** button displays for respondents and they have the ability to save and return.
Populate form with previous response?	Determines whether answers are cleared between submissions by the same person. * **Yes, display previous responses or existing data** — Use this for forms where the previous information is helpful in determining your next response. * **No, start with a blank form every time** — Use this for any recurring forms or any forms where previous answers do not matter.
How would you like your form to display?	Allows you to select how you want a form to appear to people who are completing it. The options are: **Pop-up** — Recommended for short forms. Usually appears on the profile tab for most form settings. Provides a fast experience for things like shoutouts or feedback. **Standalone page** — Recommended for longer forms or forms that will be completed on a mobile device. Provides a more immersive experience that's ideal for things like Onboarding, or Surveys. (Default)



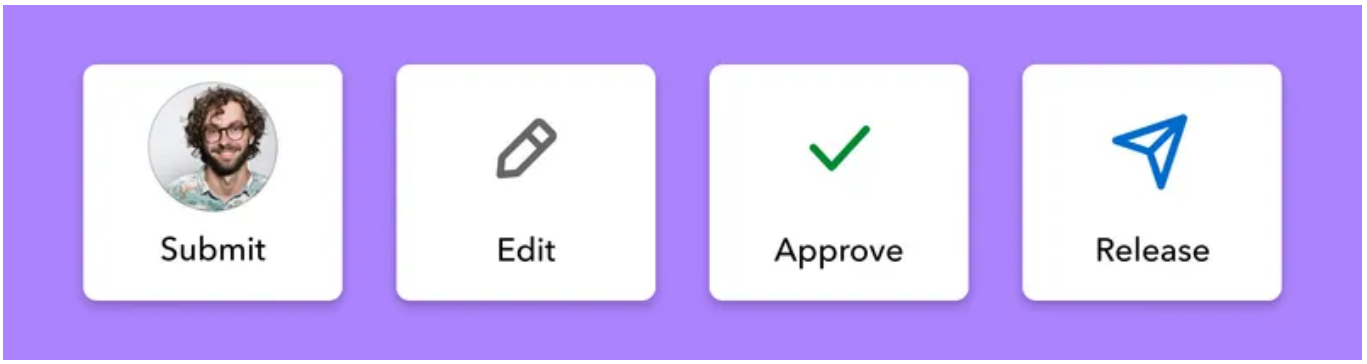
Pop-up



Standalone page

After Submission

For full details on the settings, see the **Form responses workflows** page.



Notifications

Setting	Description
Email responses to	Determines the individuals or group within your organization to notify every time the form is submitted. You can select to notify: * **The person who completed the form** — The person who clicked submit on the form. * **The manager of the person who completed the form** — The manager of the person who clicked submit. * **The person the form is about** — The subject of the form. * **The manager of the person the form is about** — The manager of the subject of the form. * **Specific individuals** — Select from any user at your organization.

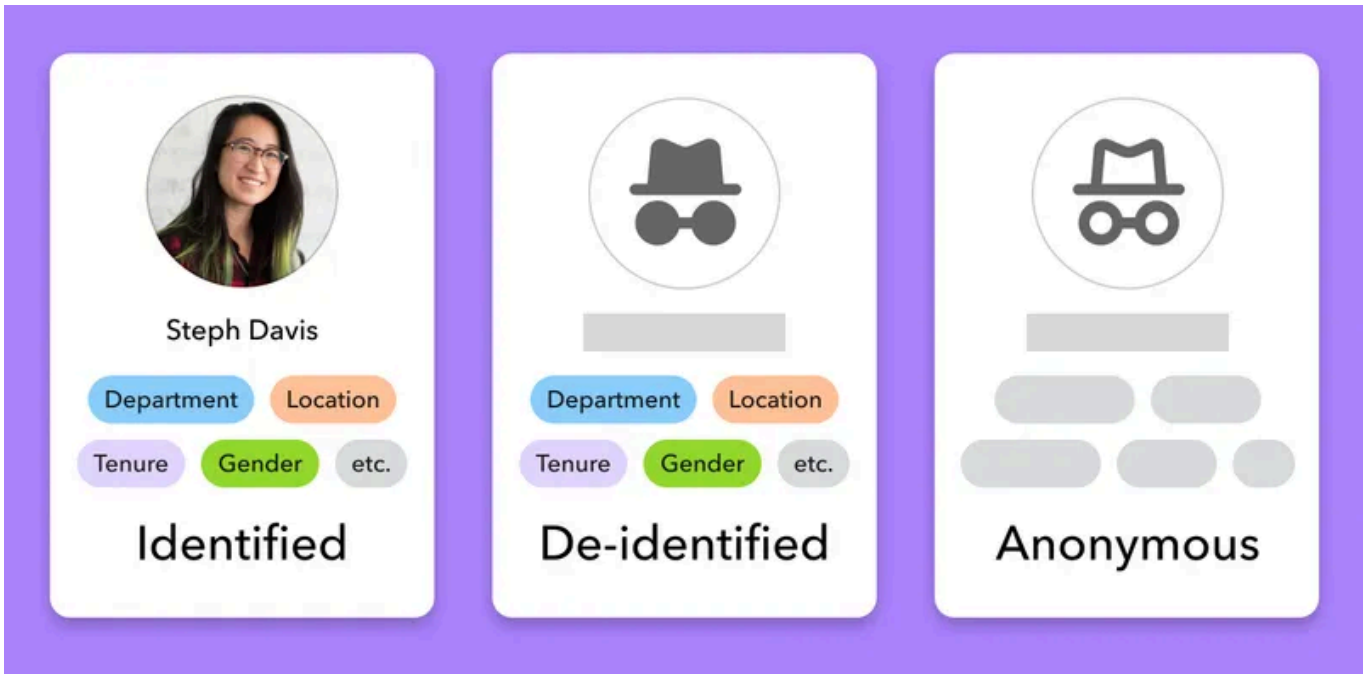
Packages: Basic | HRIS | Headcount Planning | Compensation Reviews | Performance | Engagement

5.10.1.3. Anonymous and De-Identified Surveys & Forms

Overview

When configuring a form in ChartHop, you can select from 3 anonymity options the survey:

- **Identified** - Linked to a person and their demographic information
    - The identity can be hidden from certain peple using the "Who can see the identity of the respondent?" settting.
- **De-Identified** - Hide identity, but allow certain specific demographic information and limit reporting to be stored on the form response.
- **Anonymous** - Not linked to any personally identifiable information



*Example fields listed

Modules: HRIS | **Engagement** | Goals | Performance | Compensation Reviews | Headcount Planning

De-identified Forms

De-identified forms are the most common type that is used in surveys. They give an individual who completes the survey anonymity while allow the administrators to do analysis at a group level in order to identify trends within demographic groups.

Configure De-identified forms

1. Go to **Admin > Modules**
2. Scroll to **Engagement > De-identified forms**

Setup recorded demographic fields

To set the recorded demographic field that you would like to collect within your de-identified surveys:

1. Add and remove fields from the list of **Recorded fields**
    1. These changes will only effect *future* form responses. If you would like them applied to previous form responses, please contact ChartHop.
2. Set your **Minimum group size**
3. Click the **Save settings** button.

By default the felds are:

- **Department**
- **Location**
- **Team**
- **Employment Status**
- **Manager or IC** — Based on **Manager**
- Tenure range — Based on **startDate**
- **Gender**
- **Ethnicity**
- Age range — Based on **Birth Date**
- **Generation** — Based on **Birth Date**

You are able to add any Single Select, Multi-Select or **Smart Bucket** field as additional fields.

You may also add the **Managers** field. This allows you to create a grouping of results for everyone that **Reports Up to** a certain person (or the current viewer of a dashboard).

Fields that contain clearly identifiable information like name, email or other is explicitly not allowed to be added to de-identified surveys.

> The demographic data will be recorded **on the date of the form submission**. This way if the historical data changes, then form results will not change.
>
> If you are having issues with the demographic data not aligning to your expectations, please contact ChartHop support.

Set your mimimum group size

In order to protect anonymity, ChartHop will categorize demographics that fall below our limit as "Other."

For example, if we are grouping by Department with a limit of `5`, the results:

- 10 Responses from Engineering ➡ Displays as "Engineering"
- 10 Responses from Sales ➡ Displays as "Sales"
- 5 Responses from Support ➡ Displays as "Support"
- 4 Responses from Marketing ➡ Displays as "Other"
- 2 Responses from Operations ➡ Displays as "Other"

The default minimum sample size is 5 responses. The minimum allowed is 3 responses.

De-identified Form Results

Group results by demographic fields

To view your results by the demographic fields:

1. Go to the **Form or Survey** where you want to view results
2. Go to **Responses > Summary**
3. Use the Group by dropdown to select a field to group and analyze the results by

Understanding the "Other" Grouping

If a demographic group does not reach the minimum group size, then they will be grouped with all of the other demographic groups that have not met the minimum group size as "Other." See the example above.

In order to preserve anonymity, if the "Other" grouping only consists of a single group below the minimum group size then it is combined with another identified group in order to avoid the ability to infer identity.

For example, insted of presenting the responses as:

- 25 Male
- 35 Female
- 2 Other

Where it would be easy to infer that the "Other" is Non-Binary. The "Other" results will be grouped with a named group in order to not isolate those responses:

- 27 Male + Other
- 35 Female

Exporting De-identified Survey Responses

As the owner of a survey, you are able to **export form responses**. For a de-identified survey, this export will include demographic information with the minimum sample size limits applied across the entire dataset.

To export form responeses:

1. Go to the **Form or Survey** where you want to view results
2. Go to **Responses > Summary**
3. Click the download button, then **download the CSV**.

Anonymous Forms

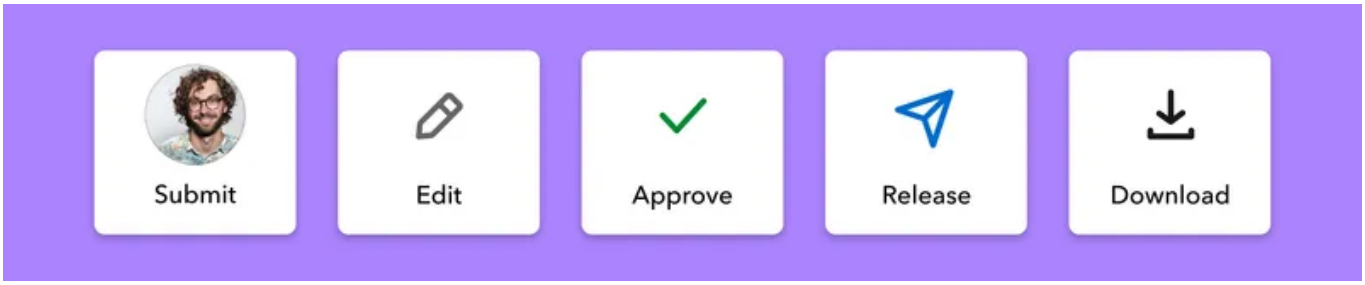
Anonymous forms allow users to submit a form and have the response recorded without any ability to link it back to them. This ensures complete anonymity for the submitter.

To setup an anonymous form:

1. Go to the **Form > Settings**
2. **Access & Anonymity** — "How should the identity of the respondent be recorded and displayed?"
3. Select **Anonymous**

You will be able to view the responses to an anonymous form within the form, survey or review, but that is the only location.

5.10.1.4. Form responses workflows



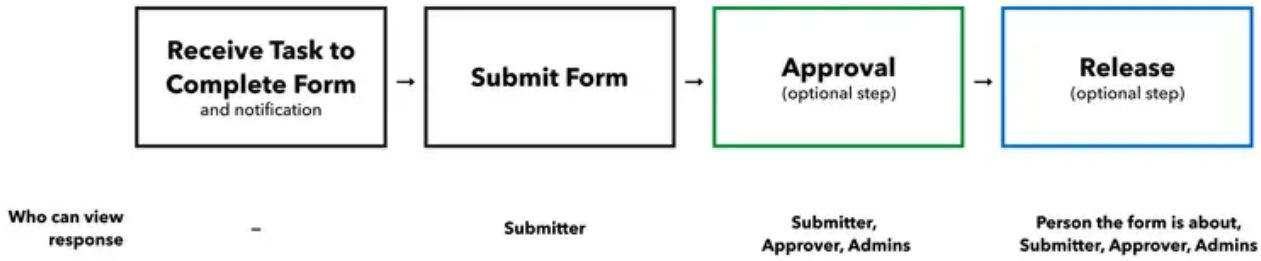
You are able to set up forms with Edit, Approval, Release, Download, or Signature Request steps within the **Configuring form settings**



Once a form has been submitted, you can decide what you would like to happen afterwards. Who can edit the form? Does it need to be approved? Should the response not be shown until a "release"? Can someone request a signature on it?

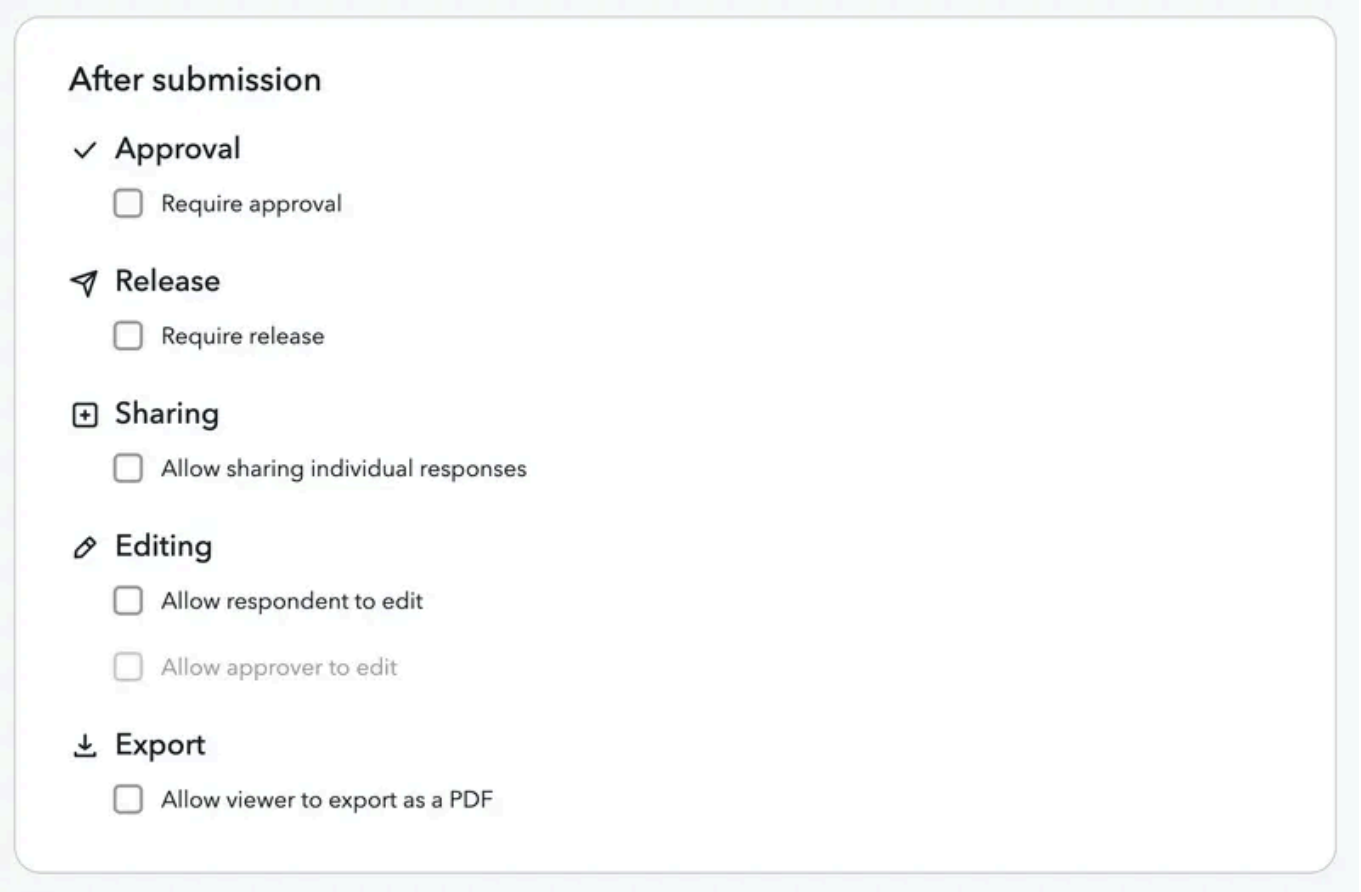
Completing forms follow a set path as displayed below.

You are able to opt in to either the approval or release steps but approval will always come before release.



Form Workflow Overview

You are able to opt in or out of each step in this menu:



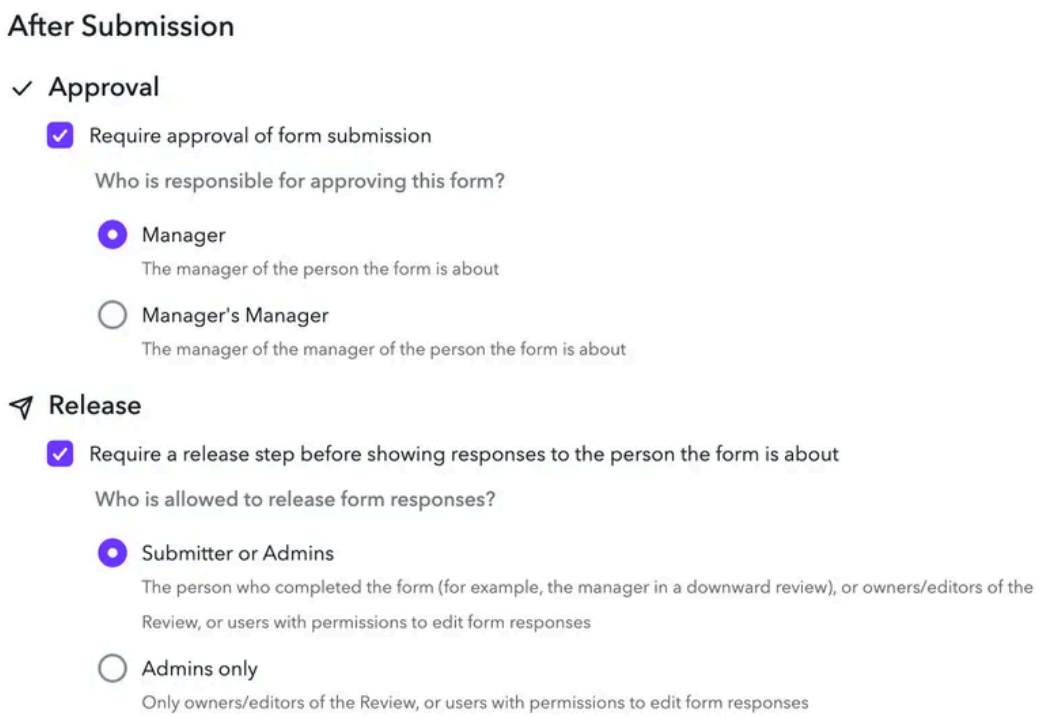
Configure a form to be approved

By adding a "approval" step to your form workflow, you can empower managers or manager's managers to "sign off" on information before it is released.

How to setup form approvals:

1. Add the form to a column in a **Custom profile tabs**.
2. In **Form > Settings > After Submission > Approval** — Enable the approval step by clicking the checkbox for: ✅ **Require approval**

3. Select an option for: **"Who is responsible for approving this form response?"**
    1. Manager
    2. Manager's Manager



Approval and Release options

Configure a form to be released

The release of a person's performance review or other forms often involves specific individualized timing. By adding a "release" step to your form workflow, you can empower managers and other leaders to release the information when they are ready.

How to setup form releasing:

1. Add the form to a column in a **Custom profile tabs**.
2. In **Form > Settings > After Submission > Release** — Enable the release step by clicking the checkbox for: ✅ **Require release**
3. Select an option for: **"Who is allowed to release form responses?"** — *These are the people who will be able to press the "Release response" button on the profile tab*
    1. **Respondent or Admin** — The person who submitted the form. For example, a manager in a downward review.
    2. **Admin** — In this context:
        1. An owner or editor of the Review associated with the form response.

2. Anyone in the org with the `formResponse:update` permission.
    1. The only built in roles with this is Owner
    2. Using **Defining a custom role** this permission can be given to any custom access role.

Configure sharing options for a form

Form responses may be configured to support direct sharing similar to how you **Collaborating in a scenario** or **Sharing a dashboard**. This can be helpful if someone outside of an individual's reporting line such as an HRBP or Team Lead needs to see a form response about them.

A few examples:

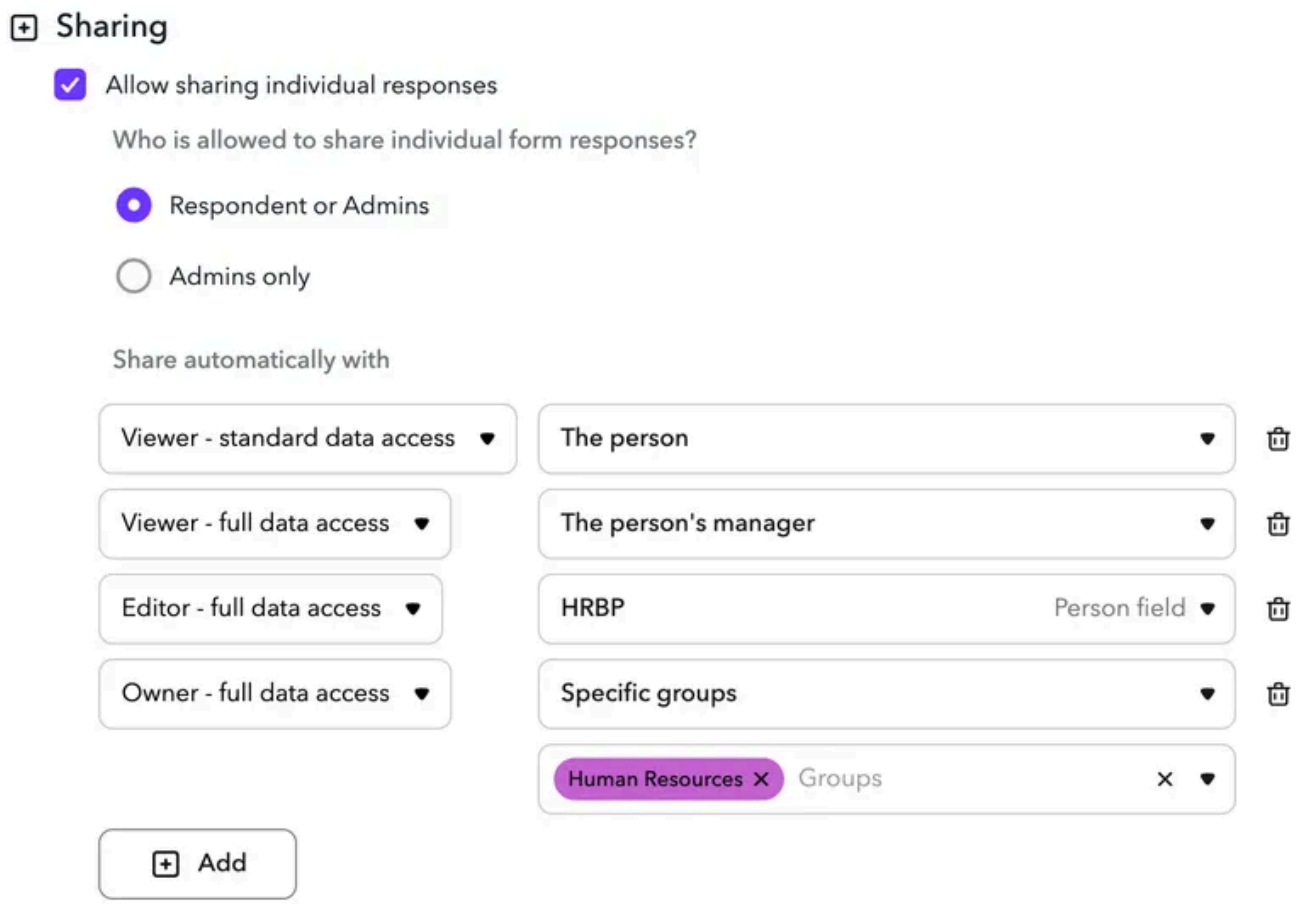
1. When running a project-based performance review, a peer review from a teammate may need to be shared with the project leader.
2. During a review, if someone changes manager mid-review and you need to give both new and old manager access to see/edit the response
3. In goal setting, a manager can be given editor access to a direct report's form response so that they can collaborate and refine the goals before they are shared with the rest of the org.
4. During onboarding, a manager submits an initial draft of a 30/60/90 day plan. The new hire then has the ability to edit and refine them as they start.
5. An HRBP needs to be able to edit a PIP form originally submitted by the manager before it is released to the employee.
6. An HRBP just simply needs to be "looped in" to any process and can be added as a viewer of a form.

How to setup sharing on form responses:

1. Add the form response history to a column in a **Custom profile tabs**.
2. In **Form > Settings > After Submission > Sharing** — Enable sharing by clicking the checkbox for: ✅ **Allow sharing individual**
3. Select an option for: **"Who is allowed to share individual form responses?"** — *These are the people who will see the "+" button to share the form.*

1. **Respondent or Admin** — The person who submitted the form. For example, a manager in a downward review.
2. **Admin** — In this context:
    1. An owner or editor of the Review associated with the form response. *(If applicable.)*
    2. Anyone in the org with the `formResponse:update` permission.
        1. The only built in roles with this is Owner
        2. Using **Defining a custom role** this permission can be given to any custom access role.
4. Optionally, click the **+ Add** button under **"Share automatically with"** to add anyone who the form should automatically be shared with after it is submitted.
    1. Select the level of access that you would like them to have.
    2. Select who the person should be. All of the options are relative to the person the form is about.

For additional details on the roles and notifications see: **Sharing form responses**



Important setup and usage notes

- If a person has not been invited to ChartHop then they will not receive the invitation to view the form response.
- The form response history must be added to a profile page that is set to Org public or the form response will not be accessible to the person who the form is shared with.
- It's recommended that all other form visibility settings are kept to their defaults if you are using sharing.
- Only the original form submission will automatically share the response. Any edits will not share it, so if you are automatically sharing with a person who is selected as part of the form, then you edit that value, it will not re-share to the new person. The form response must be shared with them manually.

Configure editing options for a form

Depending on the form-based process you are configuring you may want different people to be able to edit a form response until certain dates or actions are performed.

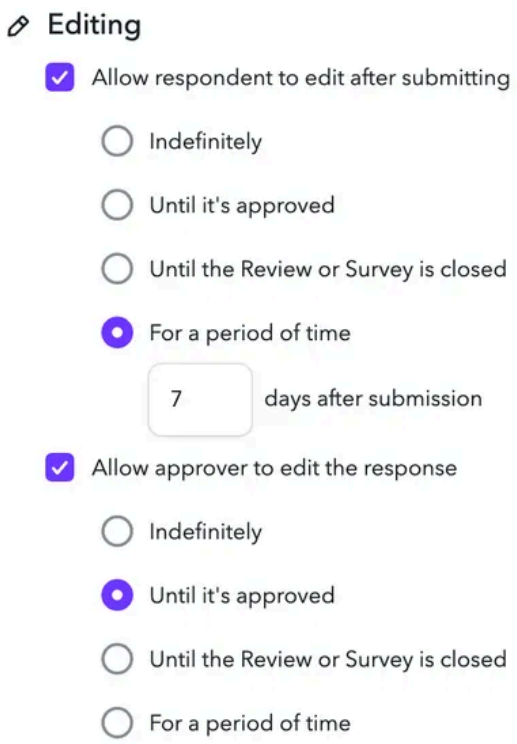
By default, a form response *cannot* be edited after it is submitted **other than by an admin.** You are able to optionally allow either the **respondent** or the **approver** to edit the form submission.

How to setup form editing options:

1. Add the form to a column in a **Custom profile tabs**.
2. In **Form > Settings > After Submission > Editing** — select who you would like to be able to edit by clicking the ✓ for either:
    1. Allow **respondent** to edit
    2. Allow **approver** to edit
3. Select an option for: **"How long can responses be edited?"**
    1. **Indefinitely**
        1. Default - Recommended for forms where it will not matter if the responses change over time.
    2. **Until it's approved**
        1. Only available if approvals are part of this form's workflow.

2. Recommended for forms where the info may be changed until an "Approval" finalizes it such as a Goal Setting process with a manager and their direct report. You can use this to make the approval step a "sign off" that finalizes the form.

3. **Until the Review or Survey is closed**
    1. Used if the form is associated with a Review or Survey to allow responses until the administrator manually **Closing a review** or **Closing a survey**.
    2. Recommended for forms where the results need to be finalized and remain unchanged (other than by admins) at the close of the review or survey.
4. **For a period of time**
    1. Set a number of days after submission that the person can edit the response.
    2. Recommended for forms where historical information doesn't need to and shouldn't change.



Edit form options

Example Downward Review Setup:

- **About:** Another Person
- **Submitted by:** Their Manager
- **Approval:** Manager's Manager

- **Release:** Submitter (The Manager) or Admins
- **Allow respondents to edit:** Until it's approved
- **Allow approvers to edit:** Until the Review is closed

Configure export & download options for individual form responses

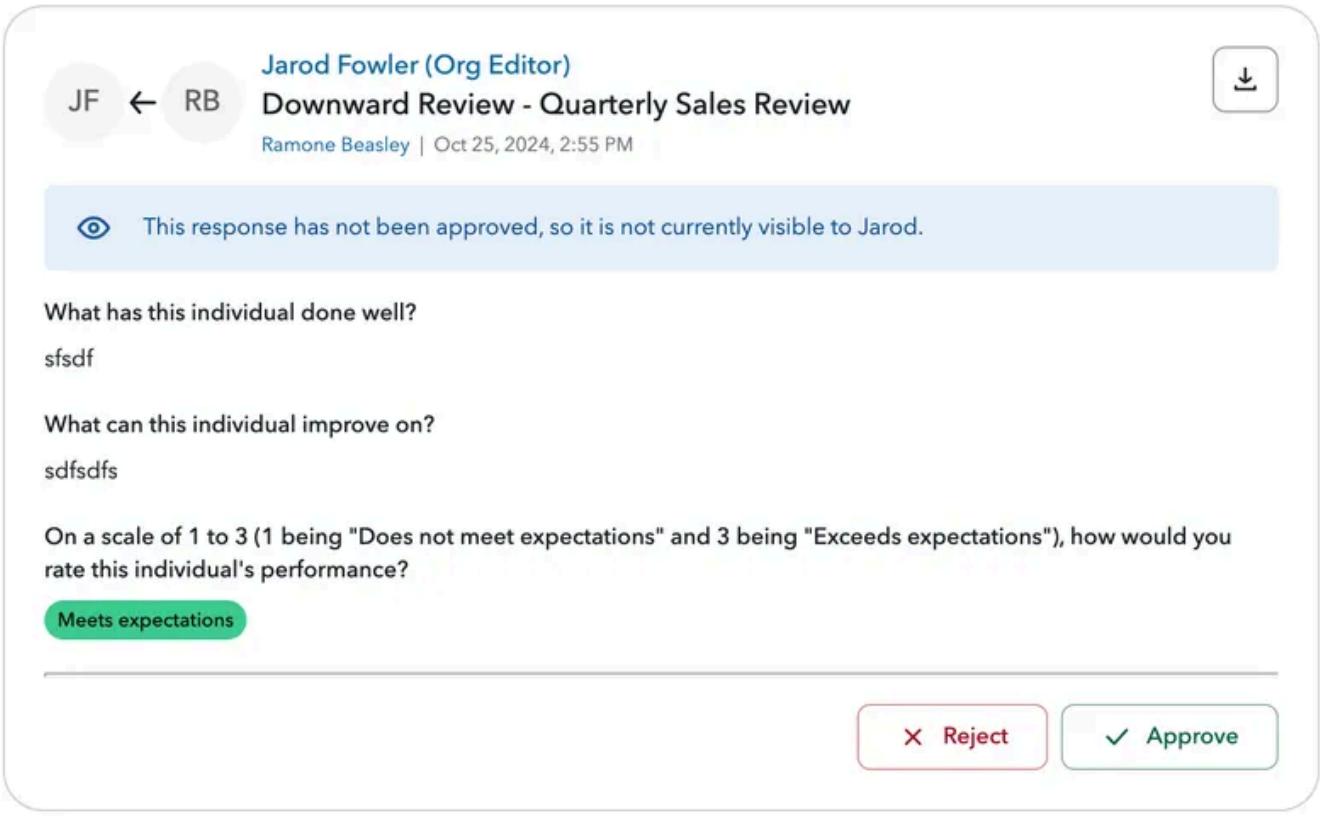
If you need form responses to be downloaded and stored as a PDF, you can allow anyone with access to the form responses to do so. This will display a download button on the form response.

How to setup a form response export:

1. In **Form > Settings > After Submission > Export** — Enable the export step by clicking the checkbox for: ✅ **Allow viewer to export as a PDF**
2. After you select this, anyone who can view the response will now see a "download" button in the top right corner.
3. Clicking **"Download PDF"** will generate a PDF of the form response and all relevant details.

Access restrictions will always be applied and text blocks will not be included in the export.

If you are looking to do a bulk export of form responses, see **Form responses**



Download button on a form response

Request a signature on a form response

After a form response has been exported as a PDF, you can request a signature on it directly within ChartHop — no external tool required.

This is useful for processes where a written acknowledgment is needed, such as:

- A manager submits a performance review and the employee needs to sign it after it's released.
- An HRBP submits a PIP and the employee needs to acknowledge receipt.
- Any form-based process that requires a documented signature for compliance purposes.

Note: Signature requests work on **PDF files only**. You'll need to first export the form response as a PDF using the Download option above before requesting a signature.

Requesting a signature via the profile

Once a form response has been downloaded as a PDF and uploaded to a person's profile, you can request a signature directly from the **Files** tab.

1. Navigate to the **Files** tab on the person's profile.
2. Upload the PDF, or select it if it has already been uploaded.
3. In the document viewer, open the **Signatures** tab in the right-hand info panel.
4. Click **Request signature**.
5. Select who you would like to request a signature from.
6. Click **Send request**.

The signer will be notified and will see a task on their ChartHop home page to complete the signature.

Requesting a signature via an Automated Action

If you want signatures to be requested automatically as part of a workflow (for example, whenever a review is released), you can use the **Send Document for Signature** step in an Automated Action.

This supports both:

- **Generated templates** — e.g., a dynamically generated promotion letter.
- **Uploaded PDFs** — e.g., a static policy document or exported form response.

For full setup instructions, see **Signatures**

Important notes

- Only **PDF files** are supported for signature requests.
- Only the following roles can request signatures: **Owner**, **Org Editor**, **People Ops Admin**, **People Ops Admin (no comp data)**, and **People Ops Admin (no sensitive data)**.
- Multiple people can sign a document at the same time — signing order is not enforced.
- Only people who currently have **login access to ChartHop** can sign documents.
- To cancel a pending signature request, navigate to the document marked *Awaiting signature*, go to the **Signatures** tab, click **Cancel request**, and confirm.

Editing & deleting form responses as an admin

Anyone in the org with the `formResponse:update` permission can edit forms at any time. The only built in roles with this capability is **Owner**. Using **Defining a custom role** this permission can be given to any custom access role.

Notifications

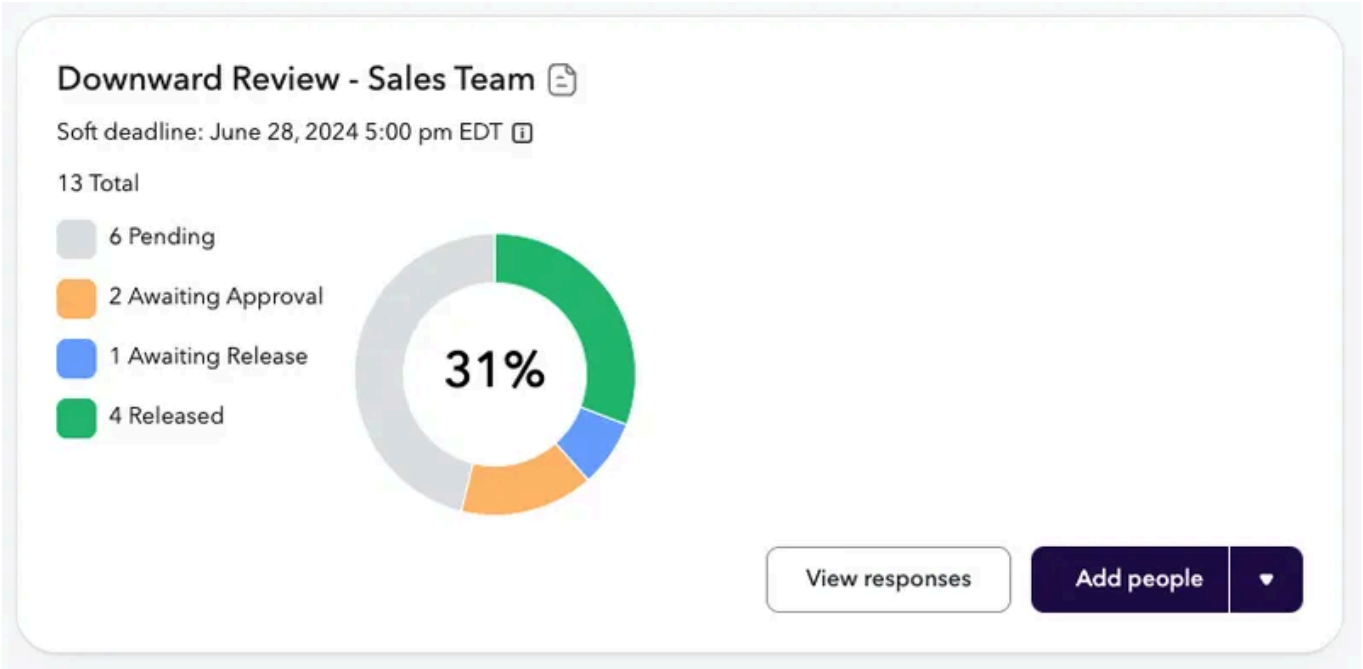
Notifications are sent to either email or slack depending on your org's notification setting at the following times:

Event	Notification
Upon Submission	□ [If Approvals are used] To the Approver, notifying them to review and approve the form □ [If Sharing is used] To anyone who the form is automatically set to be shared with □ To anyone else who is set to be notified based on the form settings
Upon Request for changes	□ To the submitter of the form, notifying them they should make changes to the submission.
Upon Approval	□ To the submitter of the form, notifying them the form has been approved.
Upon Release	□ To the person who the form is about, notifying them that they can now view the form. □ To the submitter of the form if the submitter is not the person who released the form.
Upon Signature Request	□ To the signer(s), notifying them they have a document to sign. A task will also appear on their ChartHop home page.

Monitoring form responses

As people submit their reviews, as an admin, you can monitor them within the **Performance reviews**.

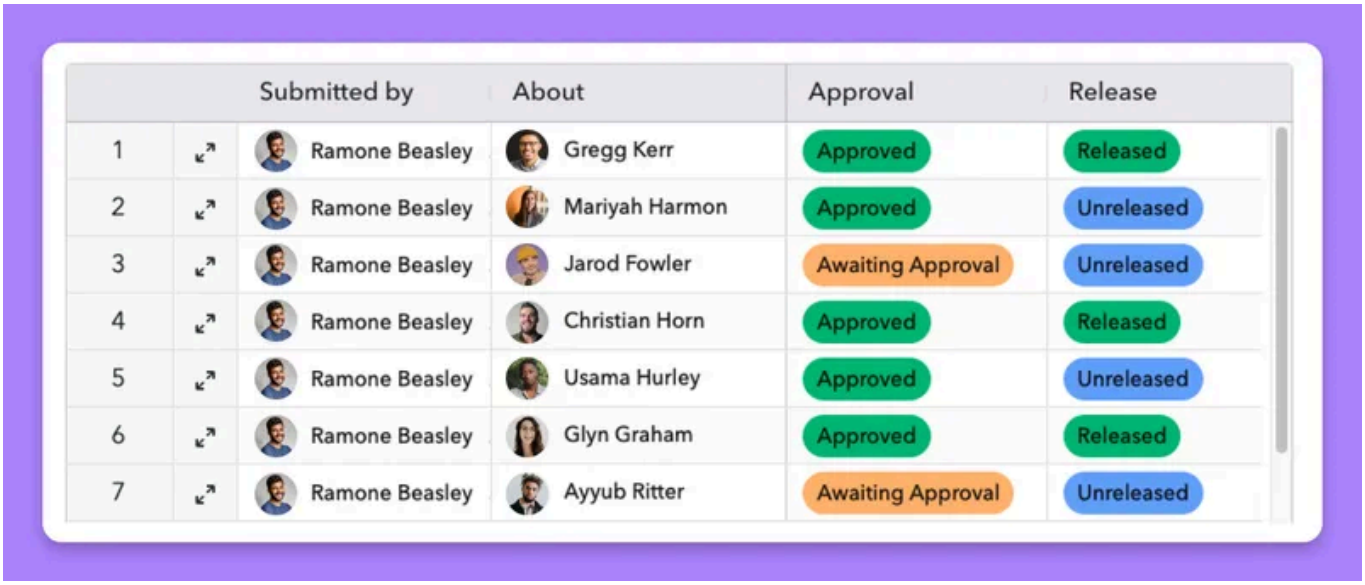
From the Forms tab within the review, you can see a graph that displays the responses.



To view the status of Individual responses, you can go to the **Responses** tab, then the **Sheet** or **Individual** View.

From the Sheet view, you can see the **Approval Status** and the **Release Status**.

From the Individual View, you can even take actions as an admin and **Approve, Reject** or **Release** forms.



	Submitted by	About	Approval	Release
1	Ramone Beasley	Gregg Kerr	Approved	Released
2	Ramone Beasley	Mariyah Harmon	Approved	Unreleased
3	Ramone Beasley	Jarod Fowler	Awaiting Approval	Unreleased
4	Ramone Beasley	Christian Horn	Approved	Released
5	Ramone Beasley	Usama Hurley	Approved	Unreleased
6	Ramone Beasley	Glyn Graham	Approved	Released
7	Ramone Beasley	Ayyub Ritter	Awaiting Approval	Unreleased

FAQ

The approver has left the organization, how do we approve the form?

The Owner of the ChartHop org will have the ability to approve the form.

The submitter has left the organization, how do we release the form?

The owner of the Review associated with the form response or the Owner of the ChartHop org will still have the ability to release the form.

What if a form is part of multiple reviews, can the owners/editors of all of the reviews release the form?

No. Only the owners/editors of the review associated with that form response. You can see the form response in the Review area of the app.

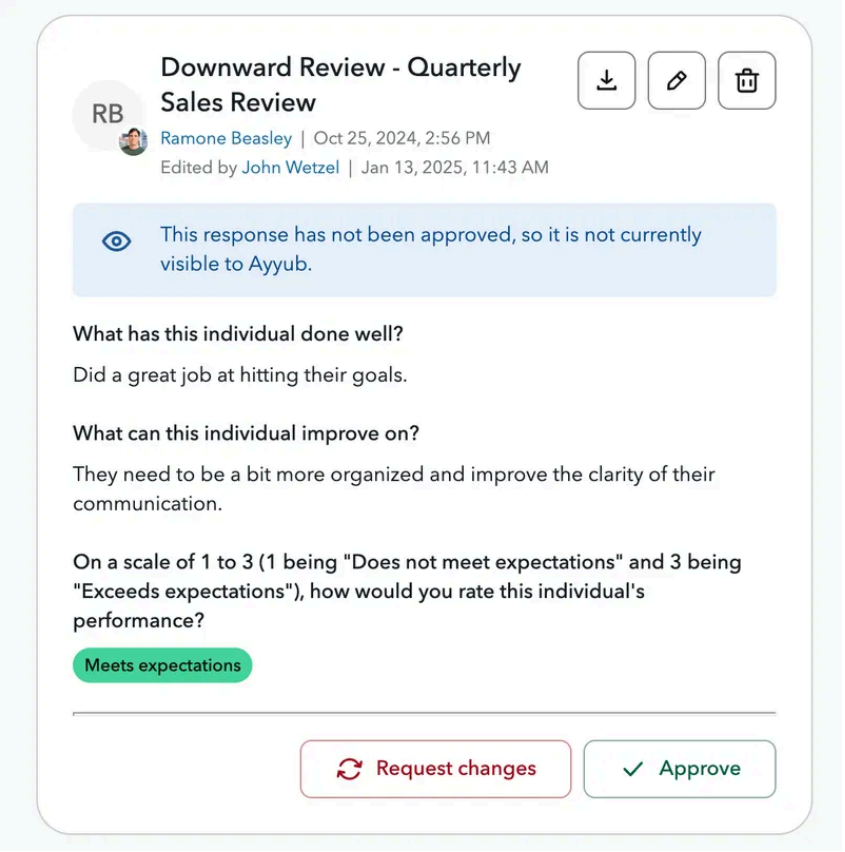
5.10.1.4.1. Requesting signatures on form responses

This page has been merged into **Form responses workflows** Please refer to that page instead.

5.10.1.4.2. Approving form responses

Approving a form response

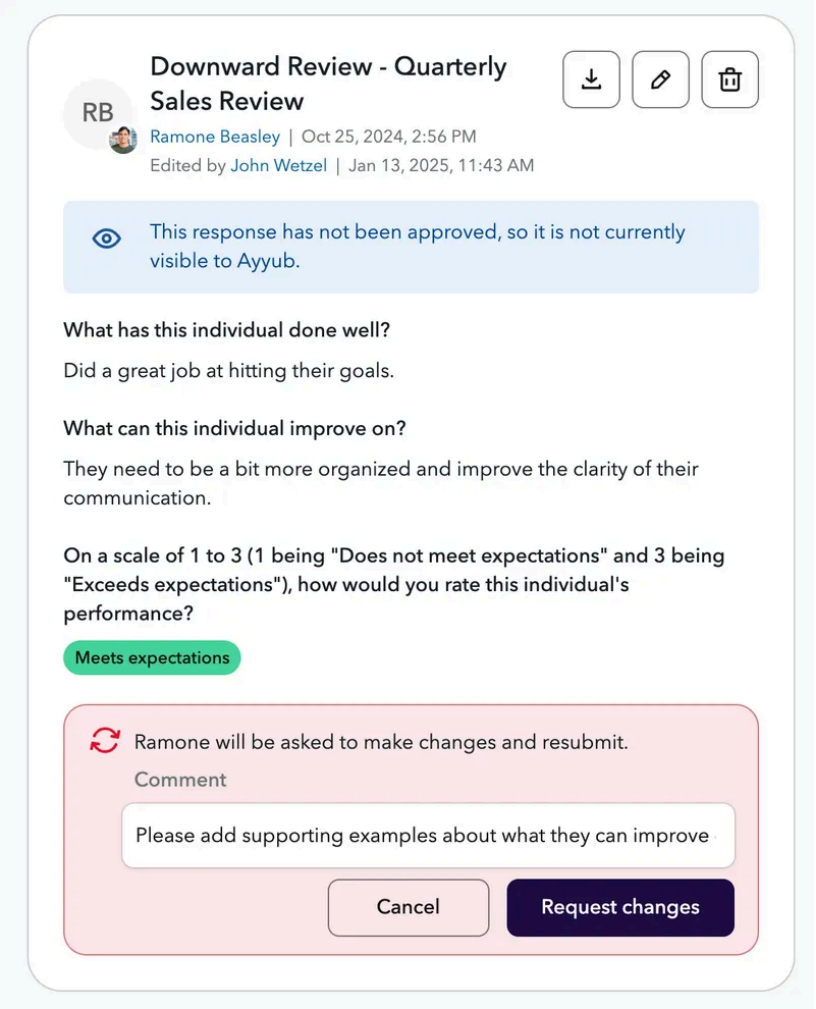
As an approver, you will receive a notification and a task that you need to approve a form response. Clicking the task, will take you the profile tab where you can review and then **Approve** or **Request Changes** using the buttons at the bottom of the form.



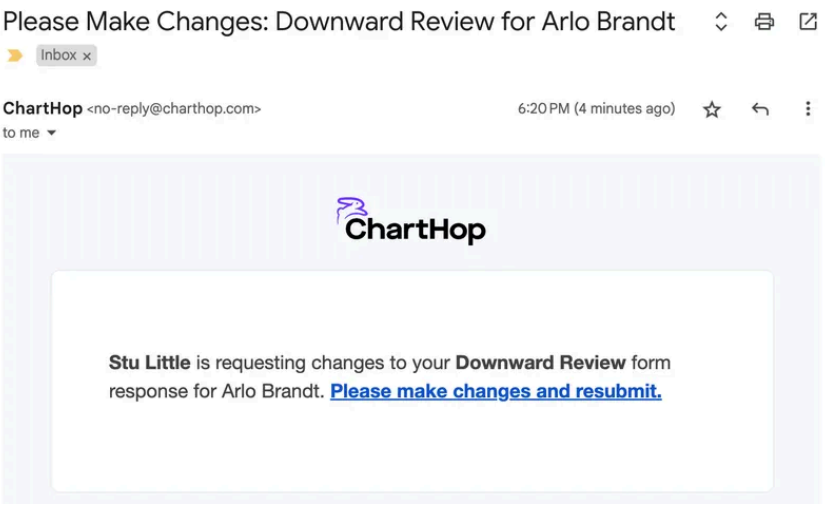
Approval Pending, Unreleased

Requesting changes

When requesting changes, the approver must leave a **comment** with details of what should be changed. Once they have added a comment, they can click **request changes.**

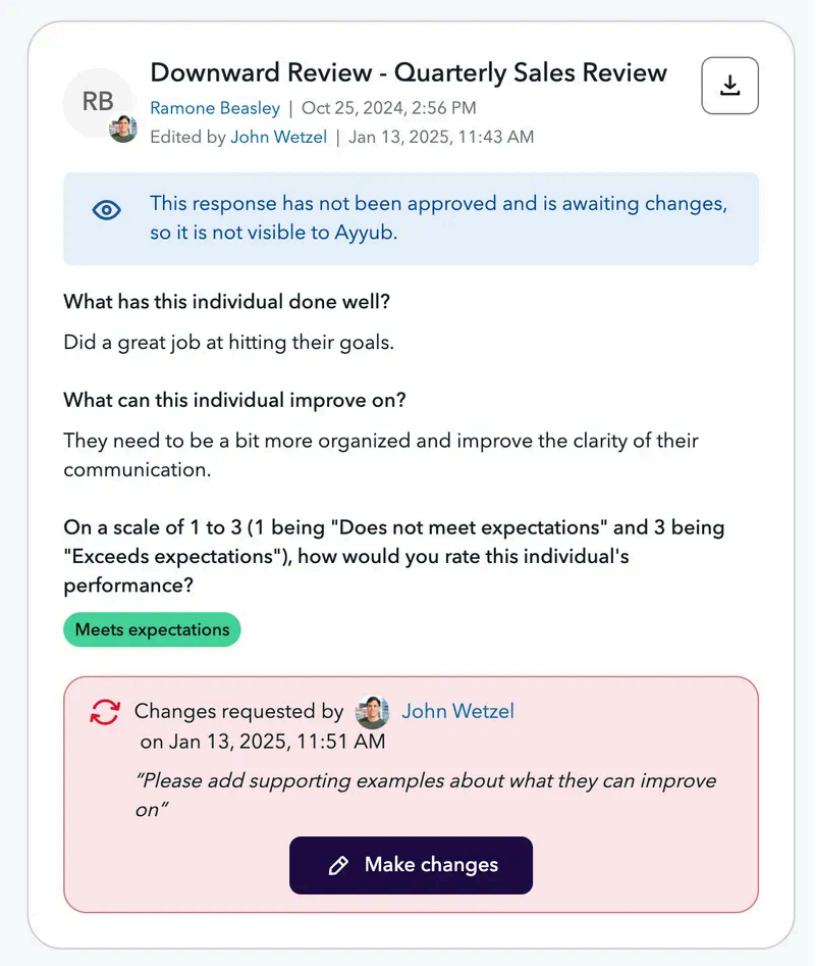


Requesting Changes



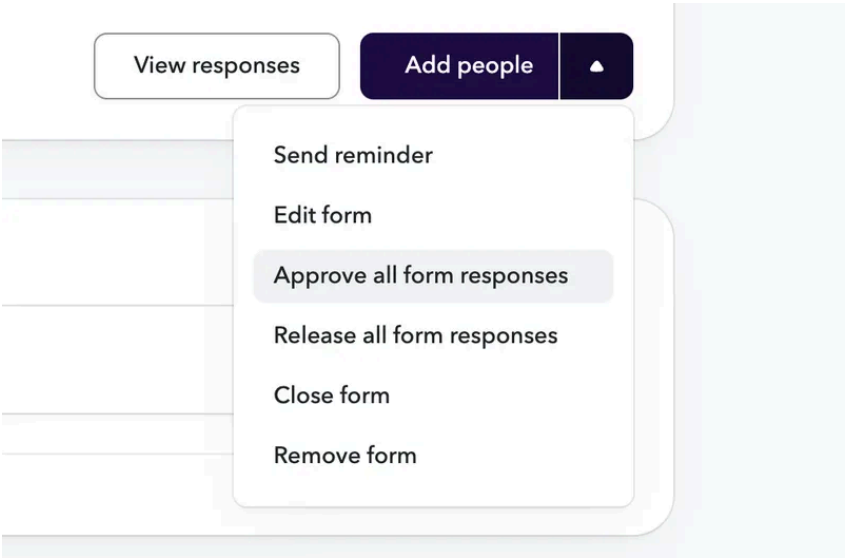
Notification for requested changes

After the changes are requested, the submitter will receive a notification and a task that they need to make changes to the submitted form response. Clicking on that notification will take them to the form response, where they can click **make changes** and edit the contents of the form and click **Resumbit** to restart the approval process. This may continue until the form response is approved.



Making the requesting Changes

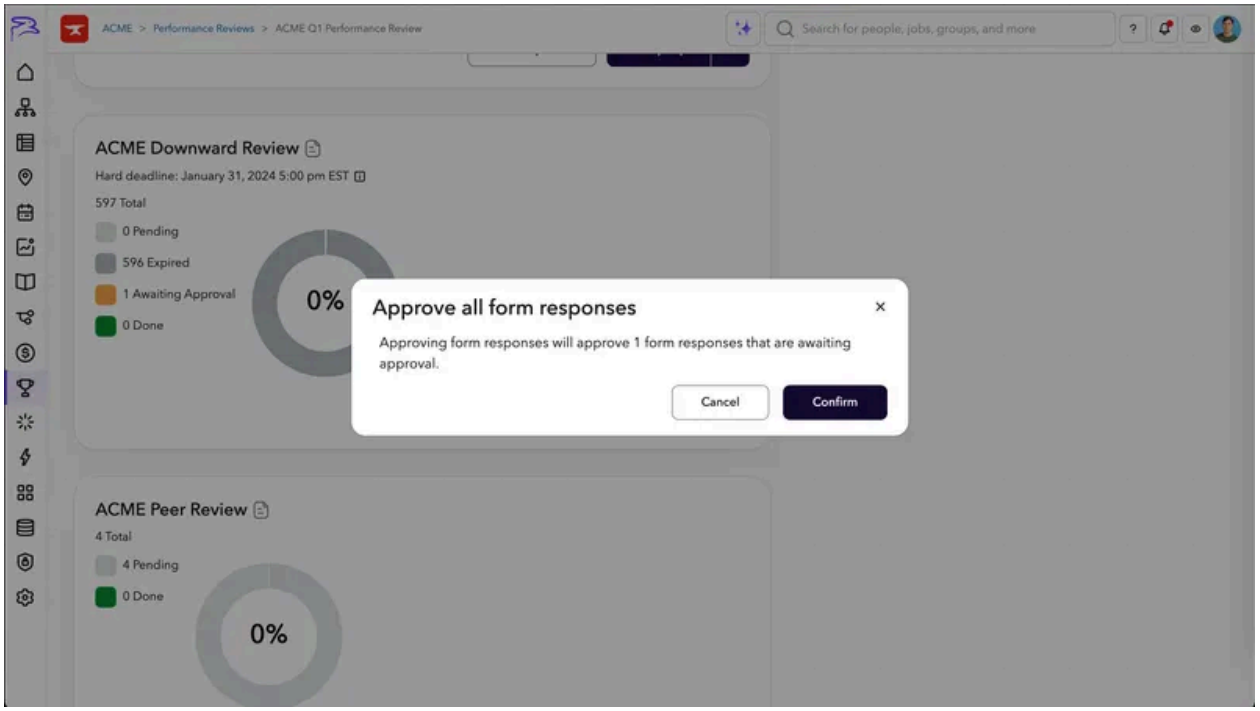
Bulk Approving Form Responses



Approving all form responses will move them from Awaiting Approval → Approved/Awaiting Release.

To bulk approve forms:

1. Go to the form that you want to approve within the Review
2. Click the overflow menu and select **Approve all form responses**
3. A confirmation modal will appear stating that all responses will be approved. Click **Confirm** to approve the responses.
4. A notification will be sent to the person who submitted the form notifying them of the approval. An approval ✔ with the name of the person who approved the forms and the time that they approved them will appear on the form response card.



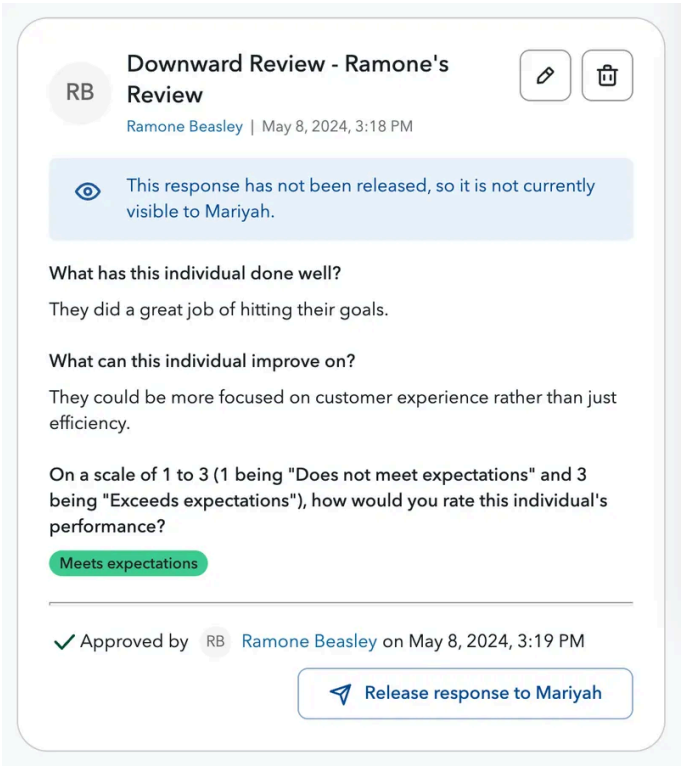
Approve all form responses confirmation

5.10.1.4.3. Releasing form responses

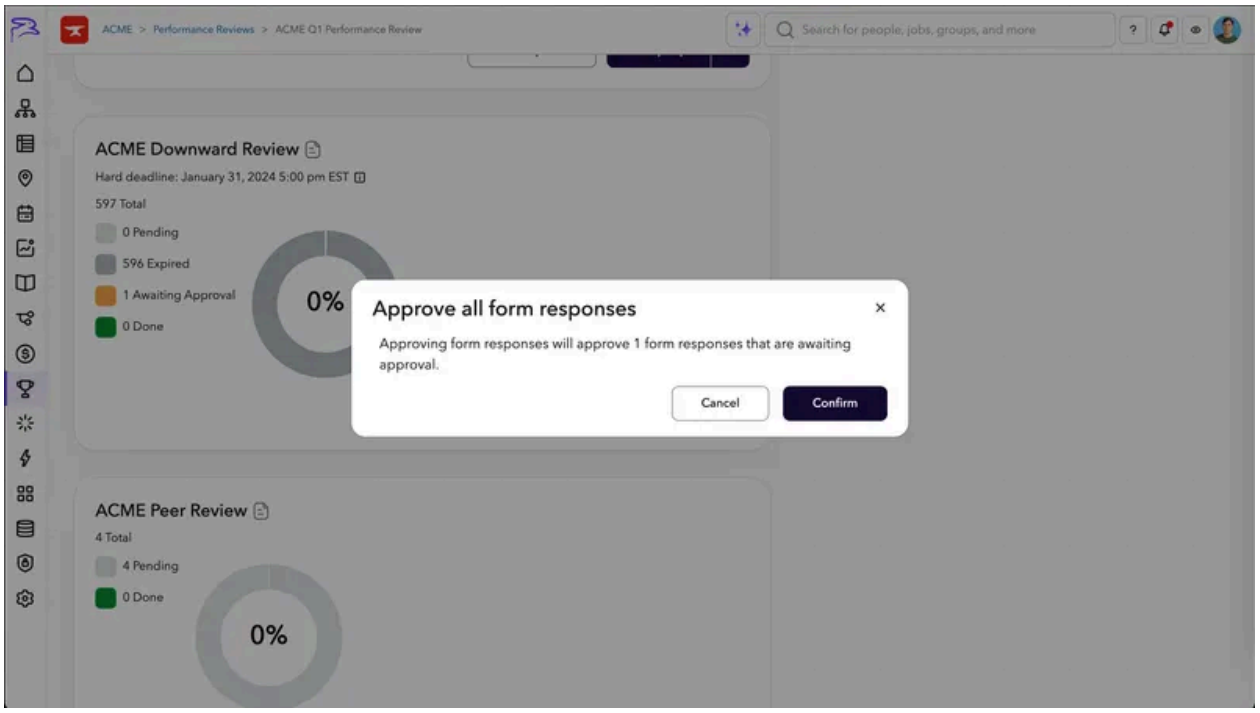
Releasing a Form Response

As the person responsible for releasing the form, you will *not* receive a notification or a task that you need to release the form response. You will just need to go to the profile tab where you can review and then release the form by clicking the **Release response to** button.

After you press the button, you will be asked to confirm. The person the form is about will receive a notification as soon as the form is released.



Approved, Unreleased



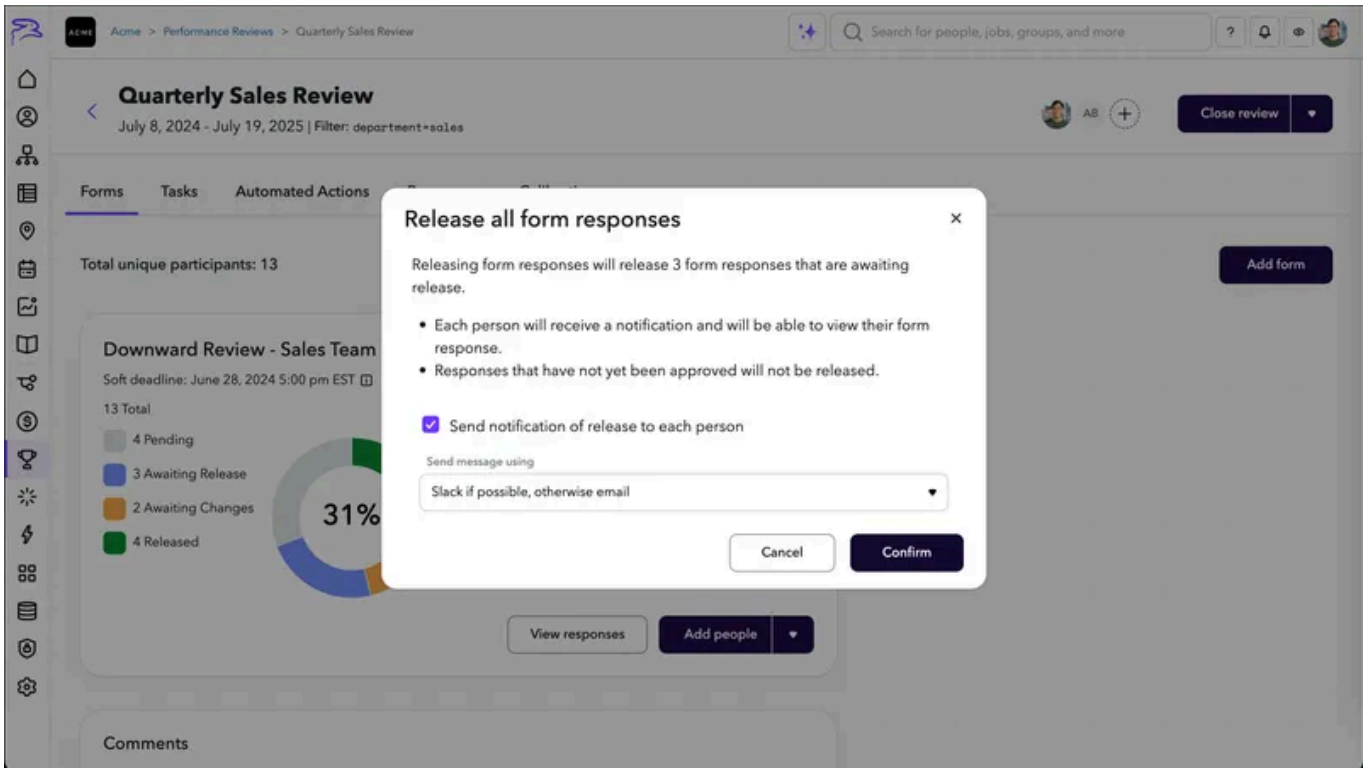
Approve all form responses confirmation

Bulk Releasing Form Responses

Releasing all form responses will move all responses from Awaiting Release → Released.

To bulk approve forms:

1. Go to the form that you want to approve within the Review
2. Click the overflow menu and select **Release all form responses**
3. A confirmation modal will then appear stating that exactly what will happen next. Here you can **opt out of release notifications** or select the format of the notification: Slack or Email.
4. Click **Confirm** to release the responses.
5. If selected, a notification will then be sent to the person who submitted the form notifying them of the approval. A release ✔ with the name of the person who released the forms and the time that they released them will appear on the form response card.



Release all form responses confirmation

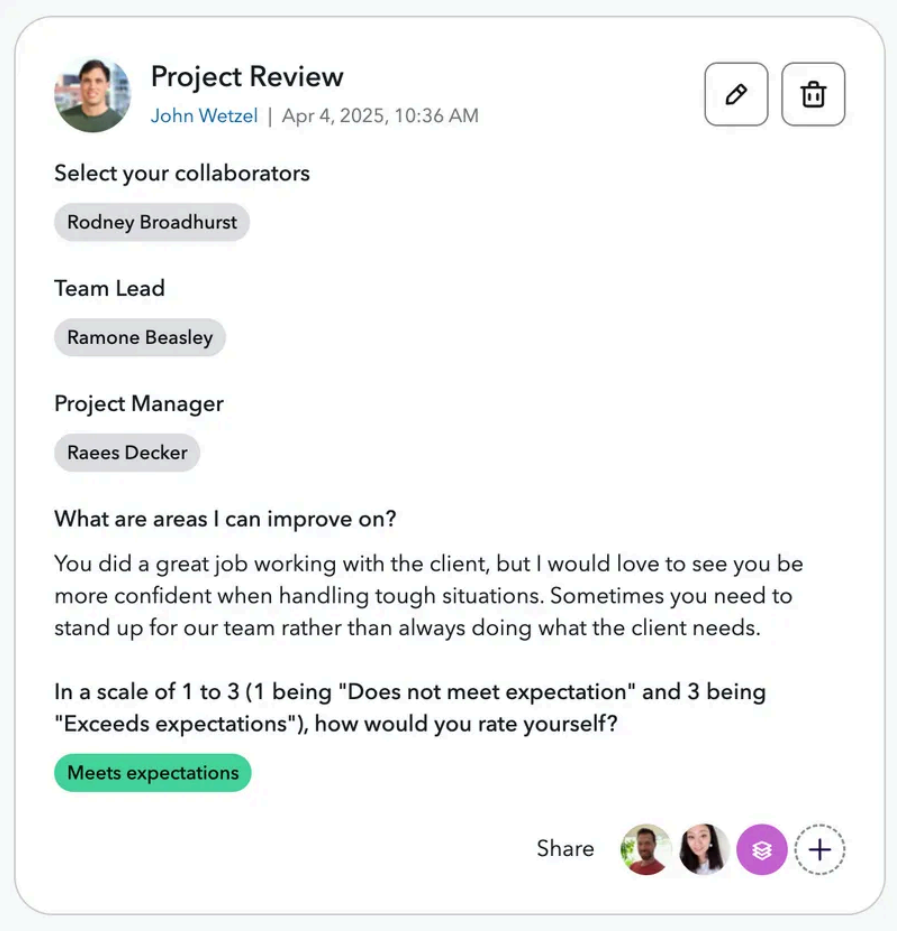
5.10.1.4.4. Sharing form responses

Automatically sharing form responses

You are able to allow forms to be shared automatically after they are submitted using settings in the form. See details on how to set this up in **Form responses workflows**.

Manually sharing form responses

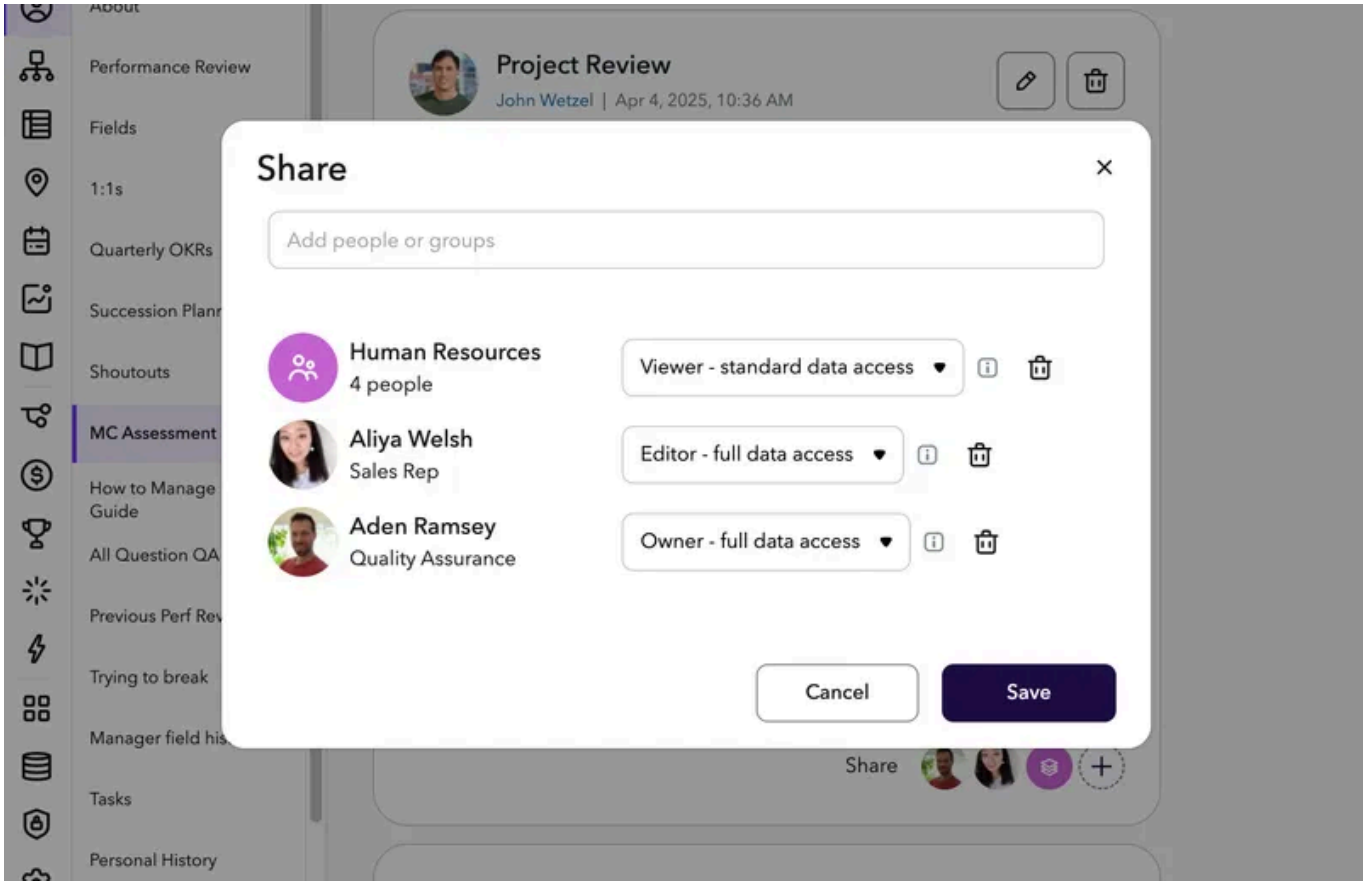
Depending on the form settings and your user permission, you may have permission to share a form response. If you dod then you will see a **"+" icon** in the bottom right corner of the form response. If you do not see the **"+" icon**, then you do have permission to share the form response.



To share the form:

1. **Click "+" icon** to bring up the sharing menu.

2. In add **people or groups**, type in the name of the person or group would like to share with then press enter or select them.
3. Select the role that you would like to assign them.
4. When you have added everyone you would like. Press **Save.**
5. The people who you have shared the form response with, will receive a notification.



Levels of access for form response sharing

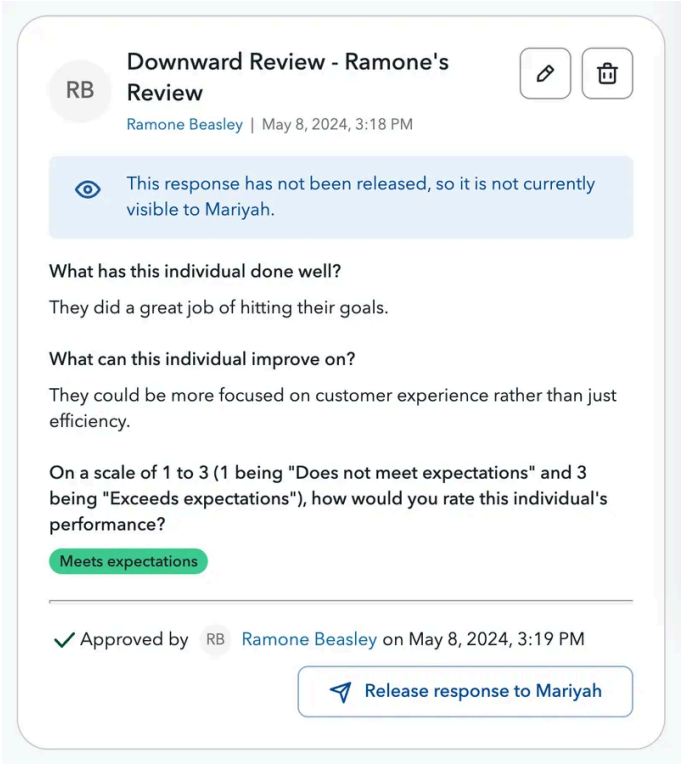
This table shows what each level is able to do with the form response.

	View response to questions	View response to fields	Edit responses	Share with additional people	Delete responses
Viewer - standard data access	✓	Limited to fields they have access to.			
Viewer - full data access	✓	✓ Can view full response			
Editor - full data access	✓	✓	✓		
Owner - full data access	✓	✓	✓	✓	✓

5.10.1.4.5. Editing form responses

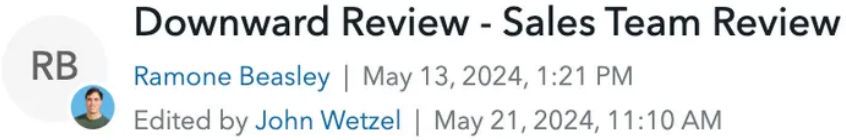
Depending on the form settings and your user permission, you may have permission to edit a form response you will see a pencil icon in the top right corner of the form response. If you do not see the pencil icon, then you do have permission to edit the form response or editing is no longer allowed.

Click the pencil to edit the form.



Approved, Unreleased

When a form response has been edited, the time stamp from the latest edit and editor will be indicated in the header of the form response. This is helpful context for understanding the information in the header.



5.10.1.5. Distributing forms

Previewing a form

You can use the **Preview** feature to test your forms before sharing.

To preview your form:

1. **Save** your form.
2. Select **Preview** in the header to test your form before publishing it for use.
3. Select a Person to preview the form as. This allows any variables or **conditional questions** to be displayed as they would be to that person.
4. Check that your form appears as you would like it to.
5. Select **Exit Preview** to close the preview.

Activating a form

By making your form Active, people will then be able to complete the form. You will also be about to use throughout ChartHop in Reviews, Surveys and with Automated Actions.

To view and complete forms, your employees must have access to ChartHop. For example, you can't send forms to contractors that don't access to ChartHop. See more about **inviting users to ChartHop**.

To publish a form:

1. Navigate to the **Settings** tab of your form.
2. Select **Active** in the **Status** section at the top of the settings.
    - **Active** - Form can collect responses, be displayed on profiles and used in reviews
        - How it will be distributed is determined in the **Distribution** section of the form settings. See **Configuring form settings** for more details.
    - **Inactive** - Form can't collect responses, is not displayed anywhere and can't be used in reviews, surveys, or actions.
    - **Archived** - the form is hidden from the list of forms across the app.

3. Select **Save** to activate the form.

Form distribution options

There are a variety of ways that you can share your form with employees.

Copy and share a link

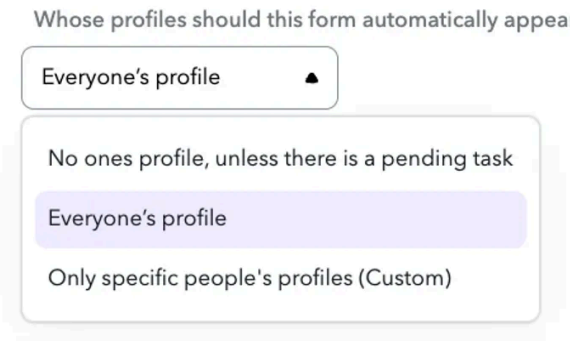
For forms that are about "The person completing the form" or "No one specifically", you are able to send out a share-able link. The link can be found in **Setting > Distribution**



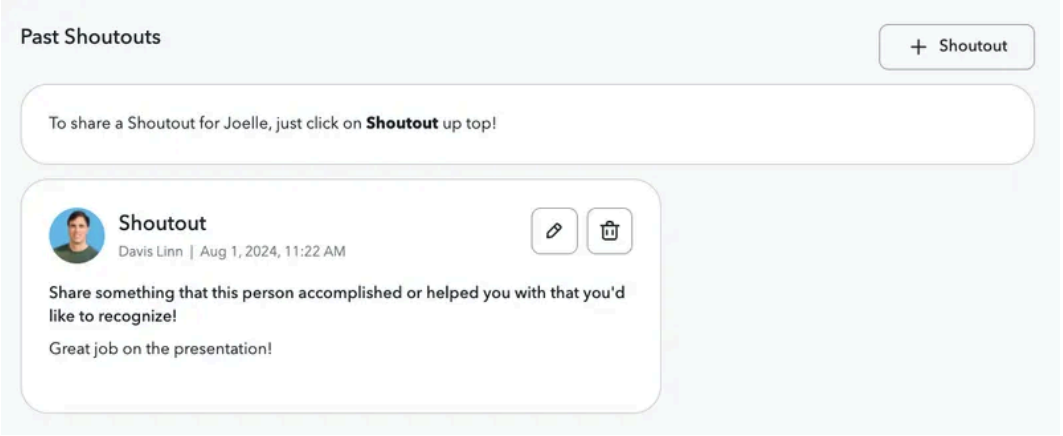
Add it to the top of a profile



For forms that are about "The person completing the form" or "another person," a button to complete the form can be surfaced on the header of the profile. See additional details in [Configuring form settings](#).



Add it to a custom profile tab



If you display form responses on a custom profile tab and the setting form is able to be completed by the person viewing the tab then they will see the "+ button name" at the top of the column.

Send it out as part of a Review or Survey

By sending a form out as part of a Review or Survey, you are able to: add deadlines, add custom messages, track who has completed the form within the context of that survey, & view form results within the context of those. See more details here:

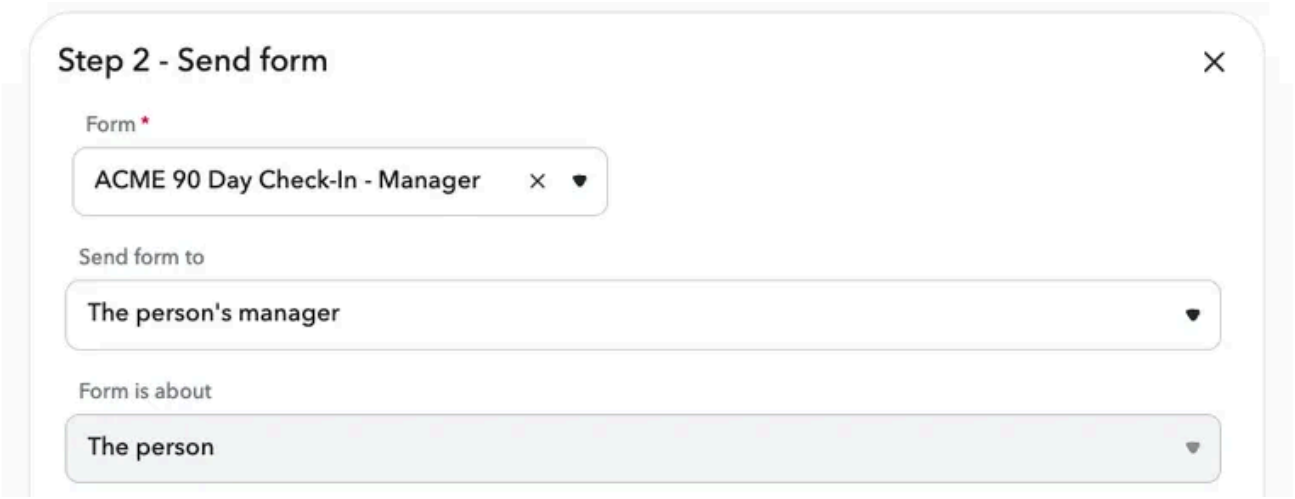
- **Adding forms to a review**
- **Adding forms to a survey**

Send it out with an Automated Action

Automated Actions allow you to send out forms based on a recurring schedule or triggered by employee lifecycle events such as a start date, 90 days after a start date or a termination.

Using the Send form step you can add deadlines, custom messages, ans specify who the form is sent to and who it is about.

See this page for additional information about **sending forms vis actions**.

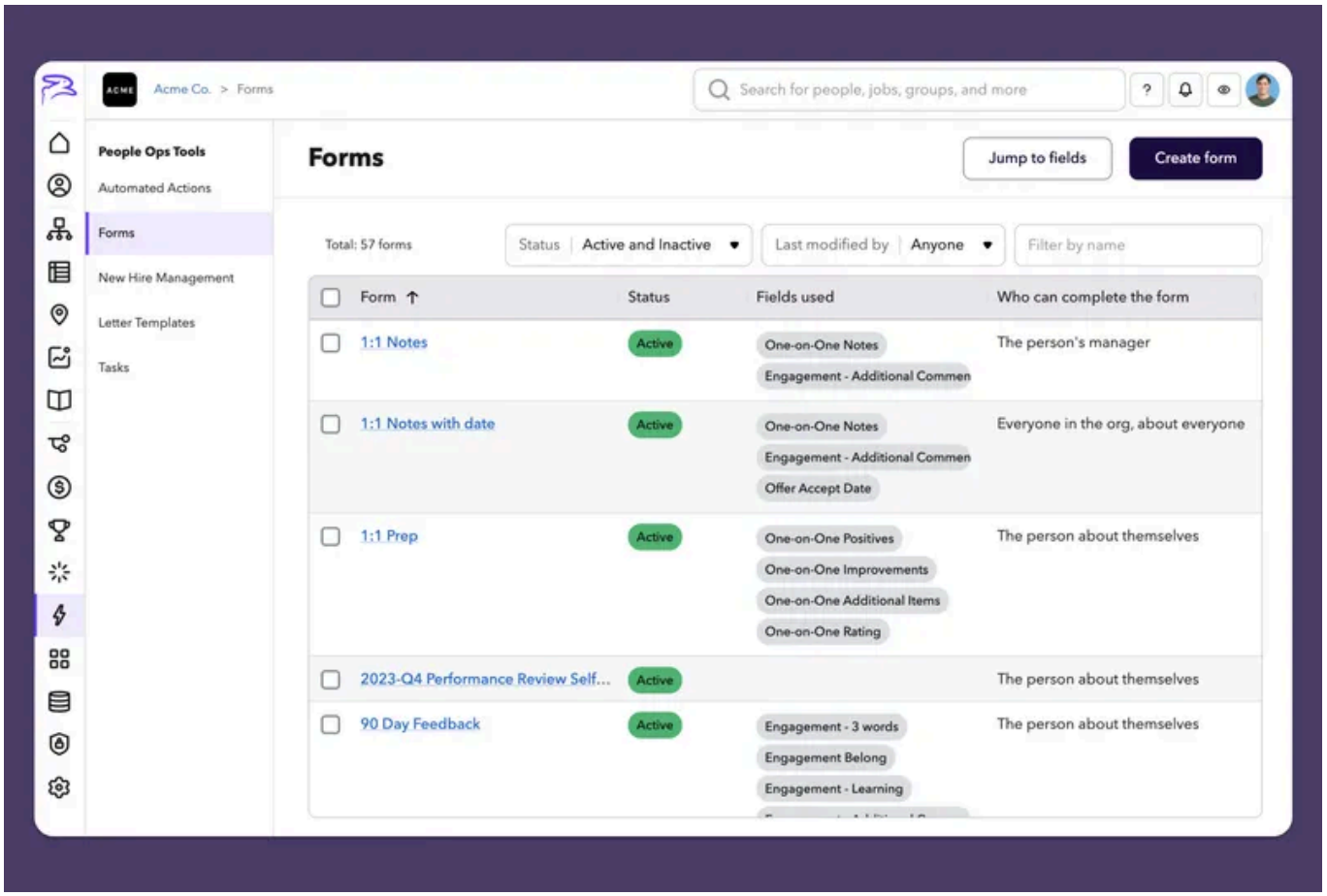

Step 2 - Send form
Form *
ACME 90 Day Check-In - Manager
Send form to
The person's manager
Form is about
The person

5.10.1.6. Managing forms

After you have made a form ative, you have the ability to edit, duplicate, deactivate, archive, or delete a form.

To access forms:

1. From the left sidebar, select **People Ops Tools.**
2. Select **Forms**



You can use the **Filter by name** search box to search for a specific form.

You can use the **Status** dropdown to filter by the following statuses :

- **All** - Displays all forms.
- **Active & Inactive** - Displays active and inactive forms.
- **Active** - Displays only active forms.
- **Inactive** - Displays only inactive forms.

- **Archived** - Displays forms that have been archived.

Edit a form

You can make changes to a form after you have published it.

To edit a form:

1. Select the form you want to edit from the table.
2. Once you're done making edits, select **Save**.

Archive a form

Archiving a form retires the form from displaying in the Forms list, but does not permanently delete it.

To archive a form:

1. Select the checkbox next to the form or forms that you want to archive.
2. Select **Archive**. The form is archived.

To unarchive a form, select the form, go to Setting and change the status to "Inactive."

Delete a form

Deleting a form permanently removes it; however, any collected data associated with that form continues to be stored in ChartHop.

To delete a form:

1. Select the checkbox next to the form or forms that you want to delete.
2. Select **Delete**. The **Delete Form** dialog displays.
3. In the **Delete Form** dialog, type DELETE then select **Confirm**. The form has now been deleted.

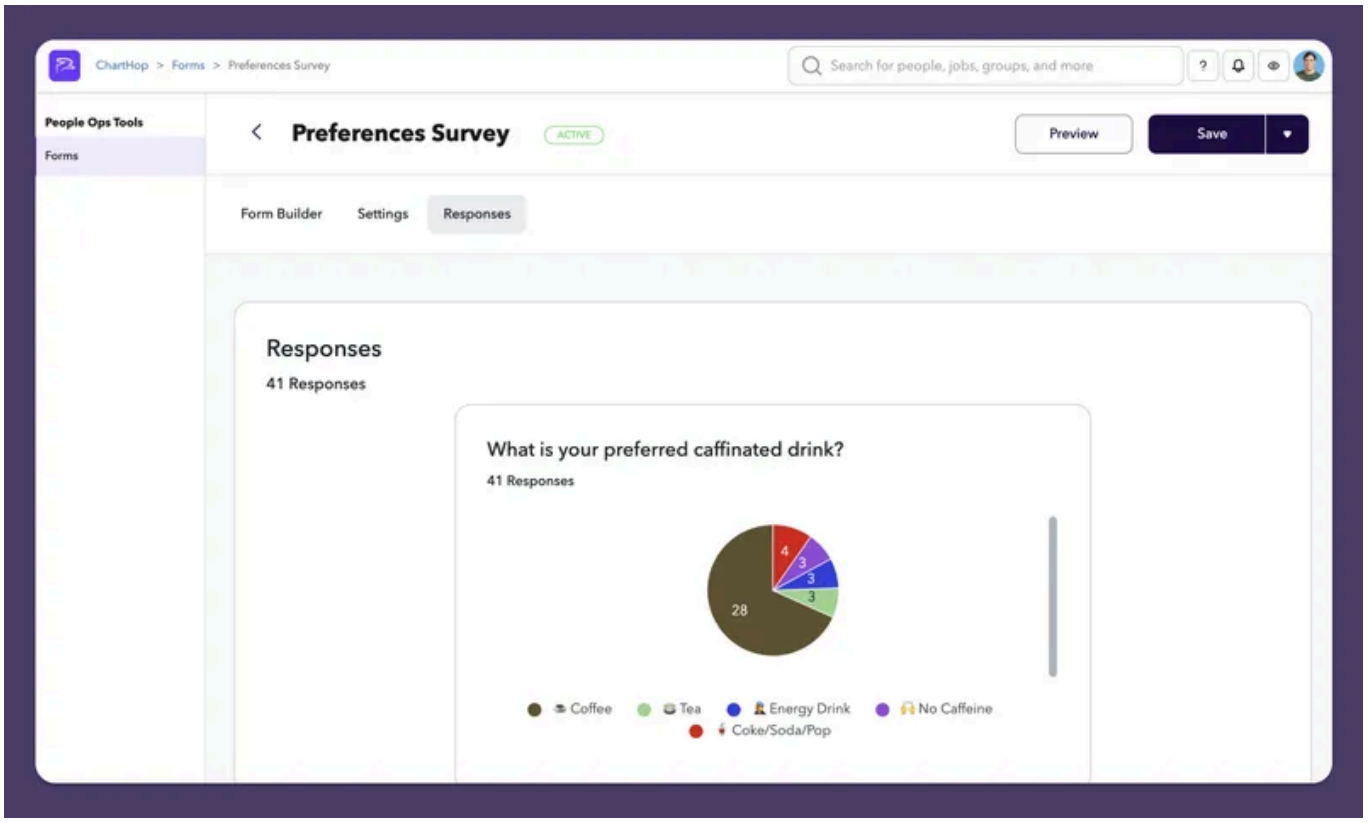
> **Packages:** Basic | Standard | **Premium**
>
> **Roles**: Owner | Technical owner | People Ops Admin

5.10.1.7. Form responses

After you have collected responses for a form, you can view those responses in **Summary**, **Sheet**, or **Individual** views from within the Form, Review or Survey.

To view form responses:

1. From the left sidebar, select **People Ops Tools.**
2. Select **Forms**
3. Select the **Responses** tab.



Form Responses Summary

All availible responses to the form will be displayed in a default chart type.

If you would like to do additional analysis or share the responses with others, you can build a custom **Dashboard** by copying the **Carrot** expression next to the graph.

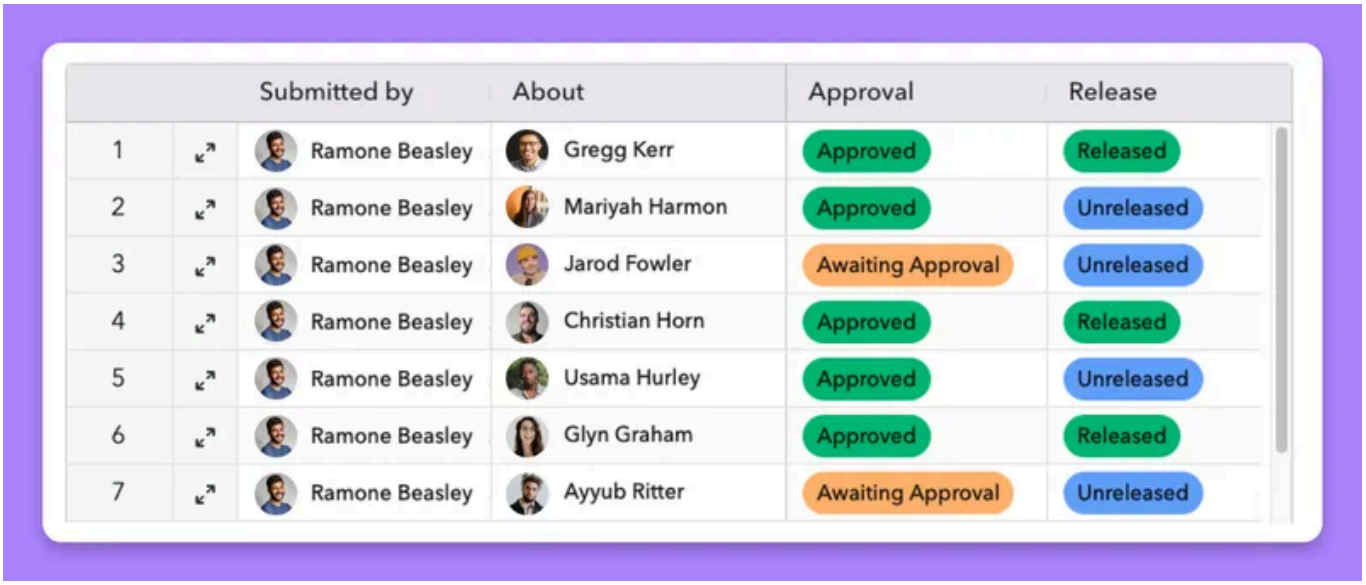


Group by

Group Responses by

Using the dropdown at the top of the page, you are able to select a demographic field to split out the results by such as `Department` or `Tenure Range`.

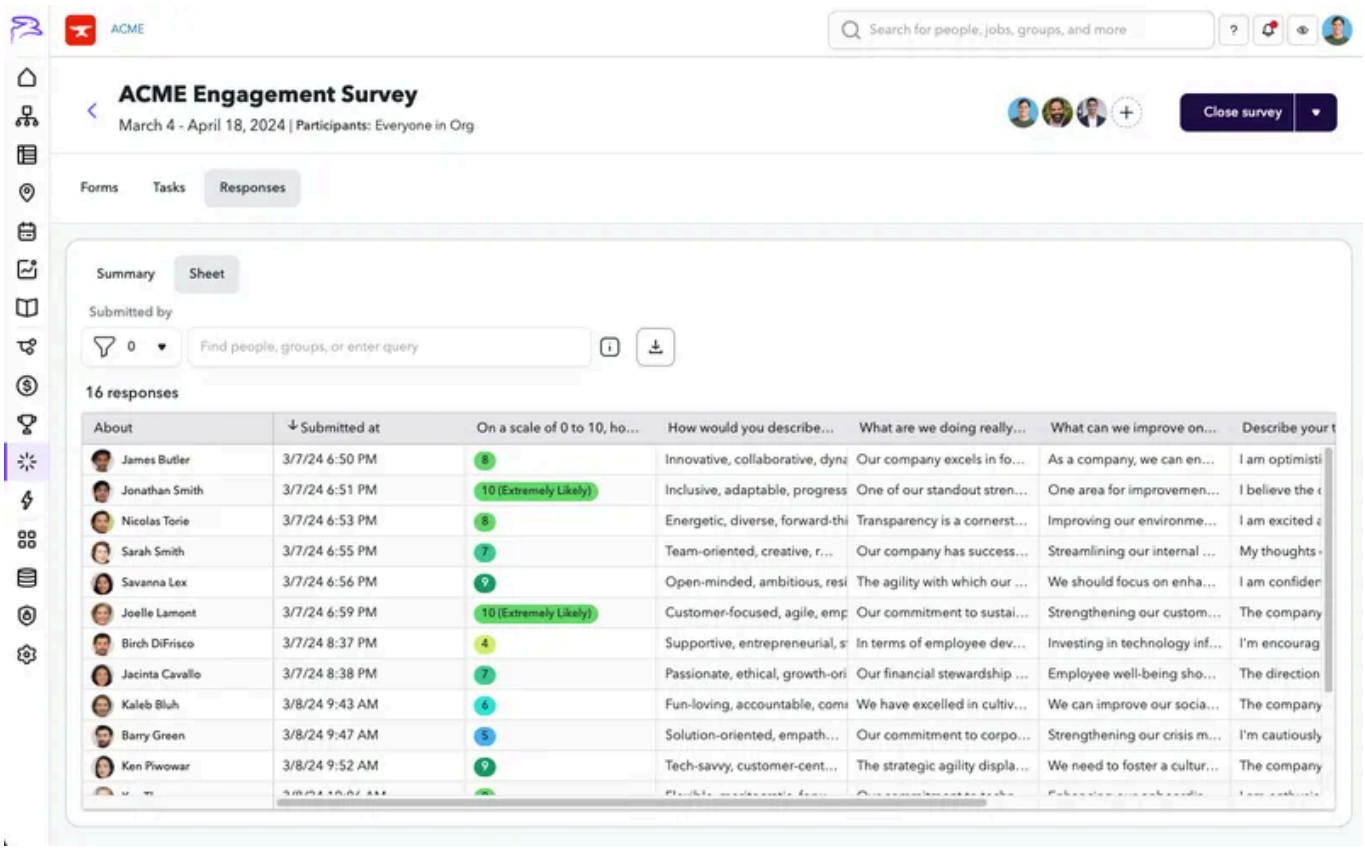
These allow you to do quick analysis. For **De-identified forms** the options displayed will be restricted to the set of "Recorded" fields."



Form Responses Sheet

The sheet is a highly versetile way to view your form response data. It feels in many ways like a spreadsheet. A few features:

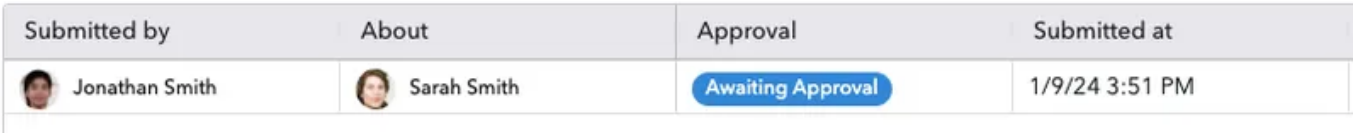
- View Approval or Release states
- See all responses both current and historical.
- Copying and pasting to a spreadsheet or document
- Navigating with your keyboard like a spreadsheet (along with keyboard tool like shift+arrows to select)
- Quick count/sums/average



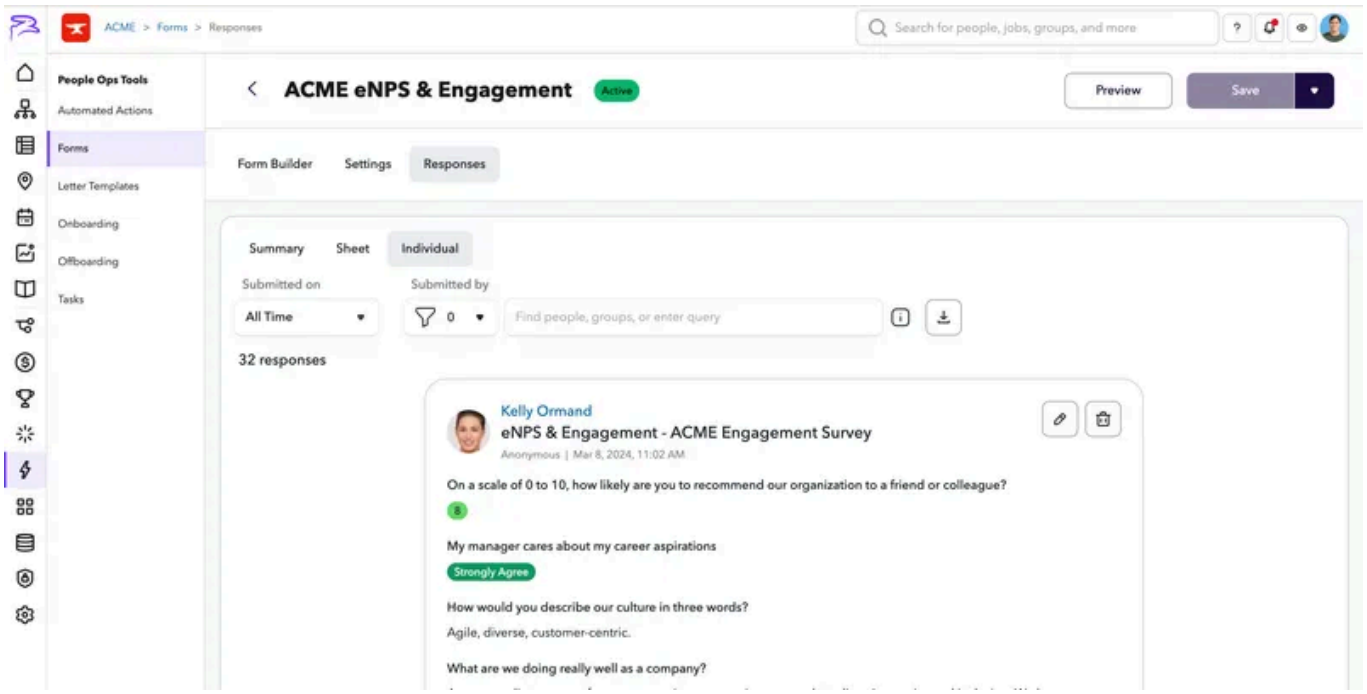
Form Responses Sheet

View Approval Status

If a form requires approval, you are able to see the status of that approval right within the table.



Individual Form Responses



The third tab allows you to view, search and filter individual form responses in a visual card format.

Filter the responses or scroll to view additional responses.

Editing form responses

If you need to modify data for a form, survey or review, it is best to edit the form response rather than edit the field directly. If you are editing a field within the form, that field value will be updated as well. If you have access to edit form responses then you have the following options.

To edit a form response on the **Sheet** view:

1. Find the form response
2. Click the Expand icon to view the individual response
3. If you have proper permissions, you will see an **pencil icon**. Click the pencil icon to edit the form response.
4. Edit the form response, then **Save**.

To edit a form response on the **Individual** view:

1. Find the form response using the filters
2. If you have proper permissions, you will see an **pencil icon**. Click the pencil icon to edit the form response.

3. Edit the form response, then **Save.**

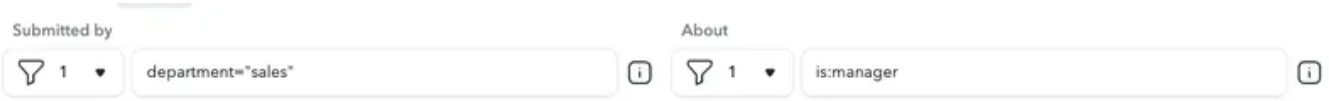
Filter Responses

For example, if you want to see the responses submitted by the Sales department or forms that are about people who are managers.

You are be able to filter the results by:

- Who submitted the form
- Who the form is about

Depending on the setup of your form, the options will vary depending on the settings of your form. For example if those are the same person, then you will only see a filter for the "Submitted by."



Filter responses by time range

Want to see all the survey responses from last year? No problem.

Note: this is only available on the Forms page. Surveys and Reviews will limit the response to submissions associated with that Survey or Review.



The form responses you have access to are:

- You are the person who submitted the form response
- You have read access to at least one of the fields in the form response.
    - If the form is a mix of fields you do and do not have access to, you will see the response, but you will only see the responses to the fields you have access to.

Form Response Access & Visibility

If you have access to a Form, Survey or Review, then you will have access to the responses sheet. This does *not* mean that you will have access to all of the form responses. Regular access roles and permissions still apply.

Access to responses to questions depends on how the form is setup and how it is used.

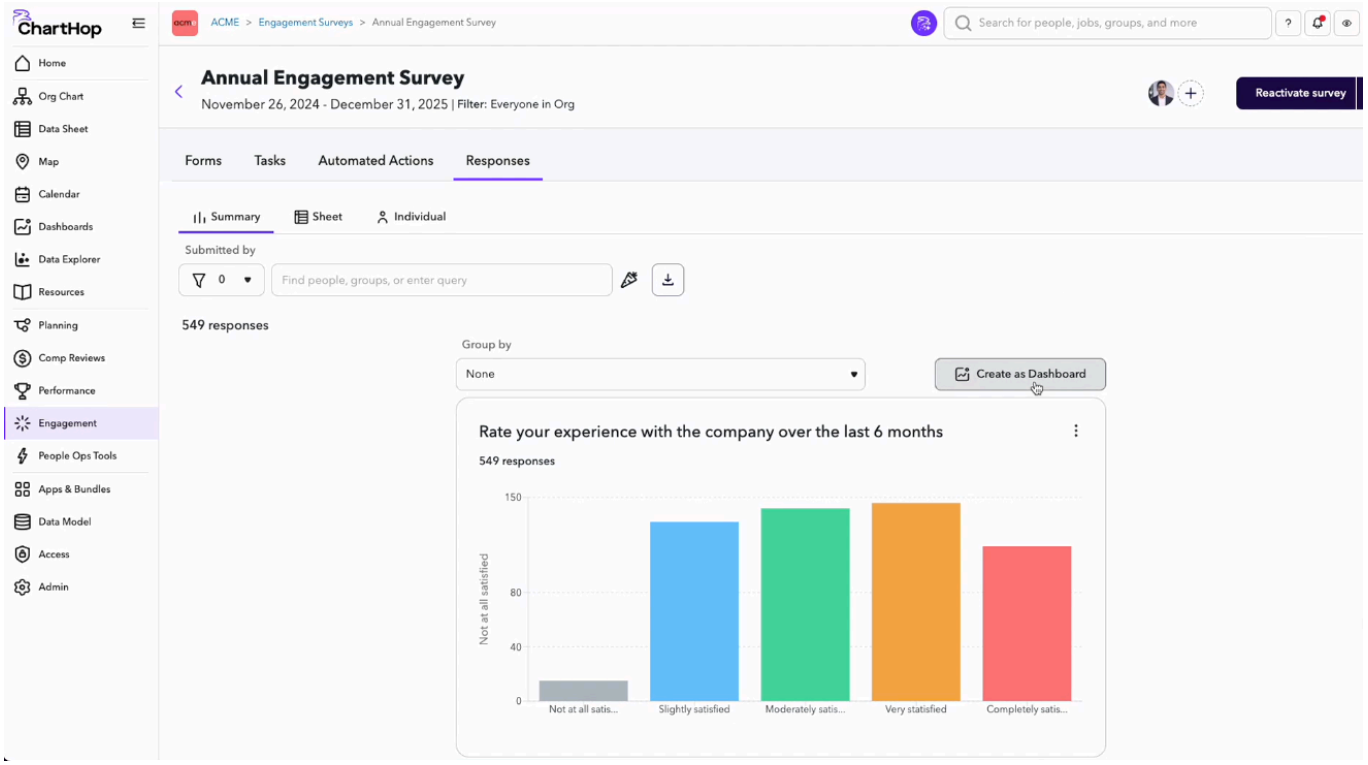
Form response visibiility rules

Situation	Can they view it
If the user is the respondent	✅ You can always view your own responses to forms.
If the user is in a **built-in**, **custom access role** with the `formResponse:read` **permission**	✅ Owners are the only built in role with this permission.
If the user has View, Edit or Owner access to the Survey or Review.	✅ Giving access to a Survey or Review allows people to see responses.
If the form response is hidden from who the form is about due to a workflow state such as: unapproved, rejected, or unreleased.	❌ They cannot view until the form is out of that workflow state.
All other users	❌ Do not have access to the form response.

Field access in form responses

If there is a mix of Fields and Questions in the form response, the field sensitivity will overrides the form response visibility. **Fields** have a configured field sensitivity such as Org Public or Private. Questions do not.

For example: If a user has access to view the form response but does have access to the field, then the form response will be displayed with responses to all Questions, but will not display the fields the user does not have access to.

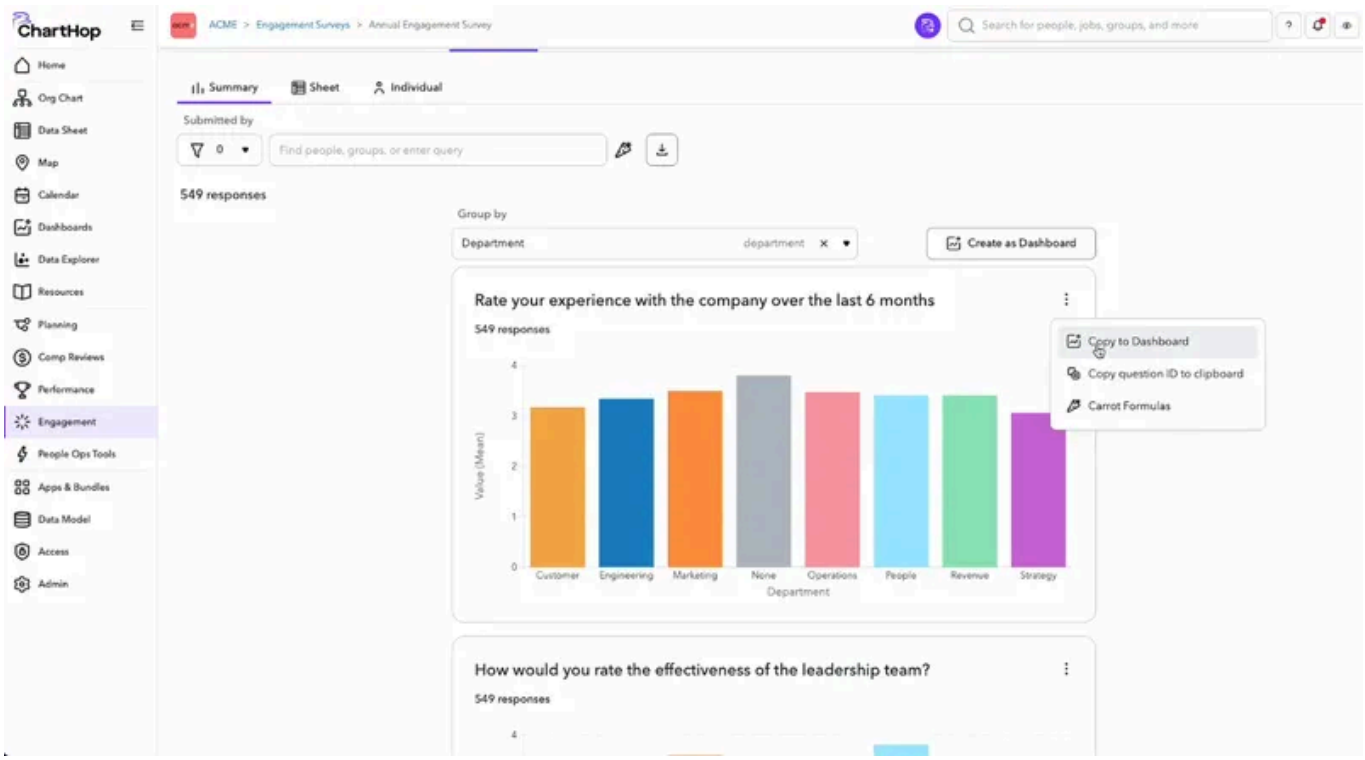


Create as Dashboard

Create a Dashboard of Form Responses

To create a **Dashboard** of the responses:

1. On the **Responses** tab of the **Form.**
2. Click the **Create as Dashboard** button.
3. A dashboard will automatically be created using the default charts for each question. Within the dashboard, you can then modify the chart type, add headers & text blocks, reorganize and then share. If you apply a **Group By** — that will be copied over as well.



Copy chart to dashboard

If you just want to bring over an individual chart, you can also copy a chart to a dashboard.

1. On the **Responses** tab of the **Survey.**
2. Click the ⋮ menu button. Then select **Copy to Dashboard**.
3. In the Copy to Dashboard dialog, select the **Dashboard** that you would like to copy the chart to.
4. Select **Copy Chart**. The chart will then by added to the end of the Dashboard

Importing & Exporting Form Responses

Exporting Form Responses

The form response exporter will export the form responses display, so it will apply any of the filters for: Submitted On, Submitted By, or About.

To export your form responses as a CSV:

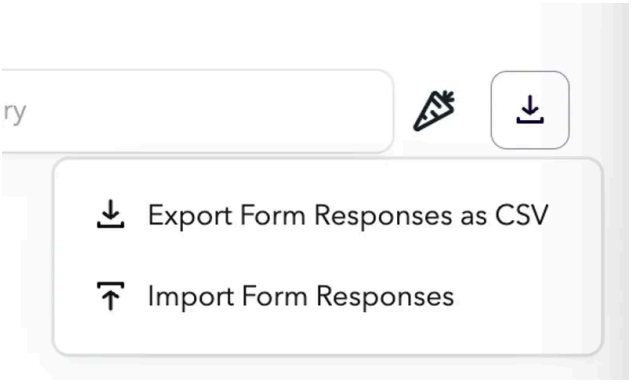
1. Navigate to the **Form > Responses Tab**
2. Set the correct time range and filter for the responses that you would like to export.

3. In the right corner, select the import/export button, then select **Export Form Responses as CSV**
4. In the dialog, select from the **export formatting options** then select **Export CSV**.
5. Your export will then be generated. In the dialog, select **Download Export**.

Importing Form Responses

Importing form responses can be useful for:

- Migrating a form or form responses from another system (ie. a previous performance review)
- Adding responses after a deadline or a form has closed
- Uploading responses for special stakeholders *(ie. an executive who doesn't follow the normal process)*
- Bulk updating or modifying existing form responses

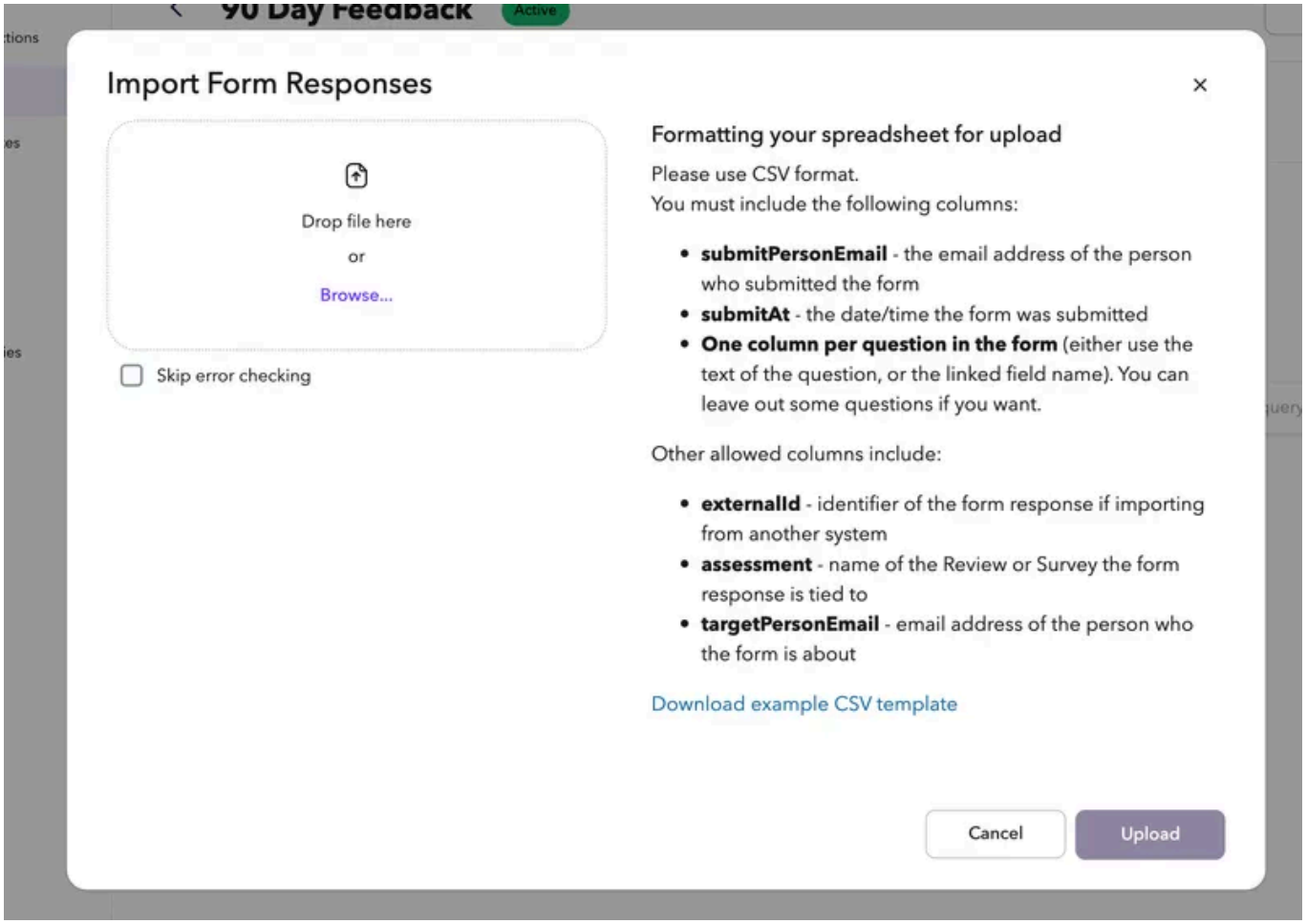


To upload a form response

1. Create a CSV of the form responses that you would like to import
2. Ensure that the form in ChartHop contains all of the questions or more that you would like to import. If you are importing a new form from another system, you will have to recreate that form within ChartHop.
3. Navigate to the **Form > Responses Tab**
4. In the right corner, select the import/export button, then select **Import Form Responses**
5. Create a CSV that aligns to your form
    1. Click the **Download example CSV template** in the modal to get a form a starting point.

2. See below for additional guidance about building out your CSV.

6. Select the CSV
7. Upload the CSV and import the form responses



Form Responses CSV Columns

We recommend your click **download example CSV template** in the modal to get a form a starting point for your import

Required Columns:

- **submitPersonEmail** - the email address of the person who submitted the form
  - Identified & De-identified Forms - the email address of the person who submitted the form
  - Anonymous Forms - Left blank, but must be included as a column
- **submitAt** - the date/time the form was submitted
  - Accepted Date/Time formats:
    - ISO format `2024-09-06T07:44:05Z`

        - Date formats `9/6/2024 or 2024-09-06` (Time will be set to 12:00 AM)
        - Date & Time with Timezone `2023/10/24 3:15:41 PM AST` (Google Sheets Default)
- **One column per question in the form**
    - Match using:
        - The text of the question *(ex. Any other thoughts you'd like to share?)*
        - The linked field name, if applicable *(ex. Additional Thoughts)*
    - You can leave out some questions if you wish
    - Only questions currently in the form can be uploaded. Previous questions, which may still be listed in the response table, cannot be uploaded.
    - Response must align with the format and constraints of a question or field. For example:
        - Single Select - Must you one of the values *(ex. Agree)*
        - Yes / No - Must use either use Yes or No

Other Columns:

- **externalId** - identifier of the form response if importing from another system
    - Optional
- **targetPersonEmail** - email address of the person who the form is about
    - Required if the form settings for: Who is this form about? → Another Person
- **assessment** - name of the Review or Survey the form response is tied to
    - □ We only suggest using this if you already have this form linked in the Review or Survey.
- **approvalStatus** - The status of the form response if it has approval or review steps. Accepted Values:
    - UNRELEASED
    - PROPOSED
- **approvalAt** - Timestamp of the approval
- **approvalEmail** - email address of the person who approved the form
- **releaseAt** - Timestamp of the release
- **releaseEmail** - email address of the person who released the form

5.10.2. New hire management

ChartHop can automatically import new hires from your ATS via an Inbound Data Flow. If you haven't yet configured your ATS, you will need to set up an **inbound job data flow from your ATS** first.

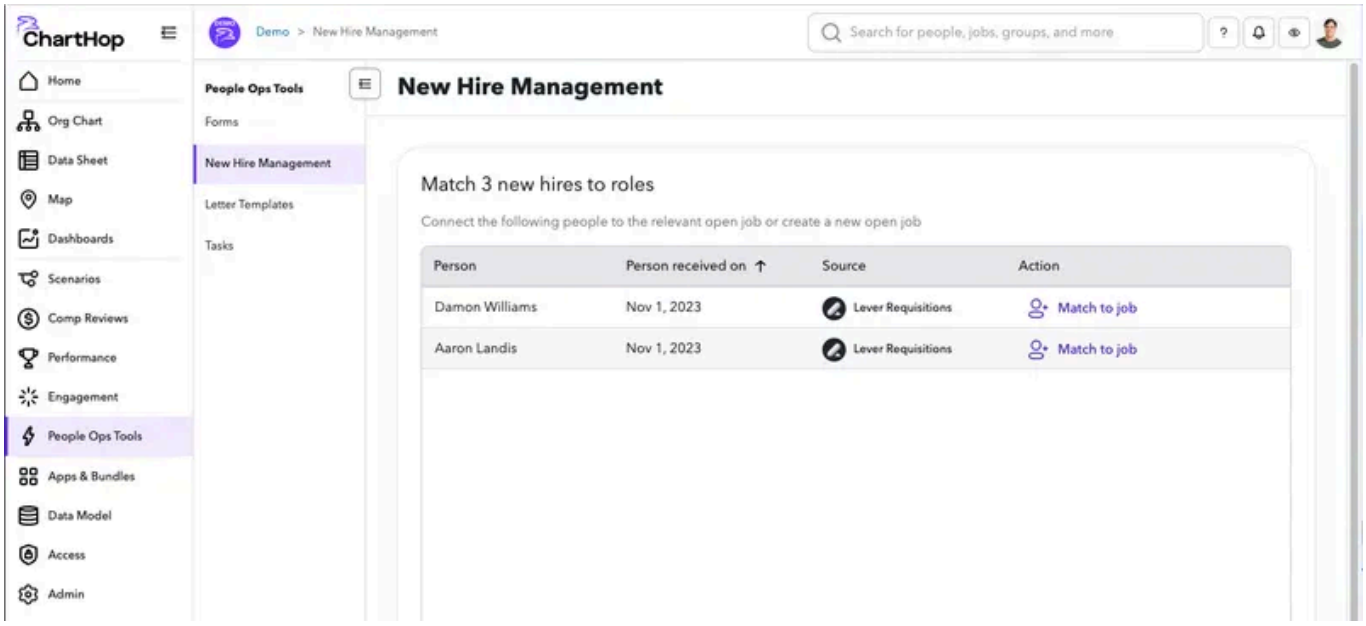
When you mark a candidate as “hired” in your ATS, ChartHop will automatically try to match the person to the proper open job on your Org Chart. Most of the time this works great and we're able to find a match.

However, if there isn’t a match, the person will be placed into the **New Hire Management** page**,** where you can then match the new hire to the appropriate open job in ChartHop. This acts like an "inbox" for new hires flowing into ChartHop from your ATS.

To access the **New Hire Management** page:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **New Hire Management.**

Matching a new hire to an open job

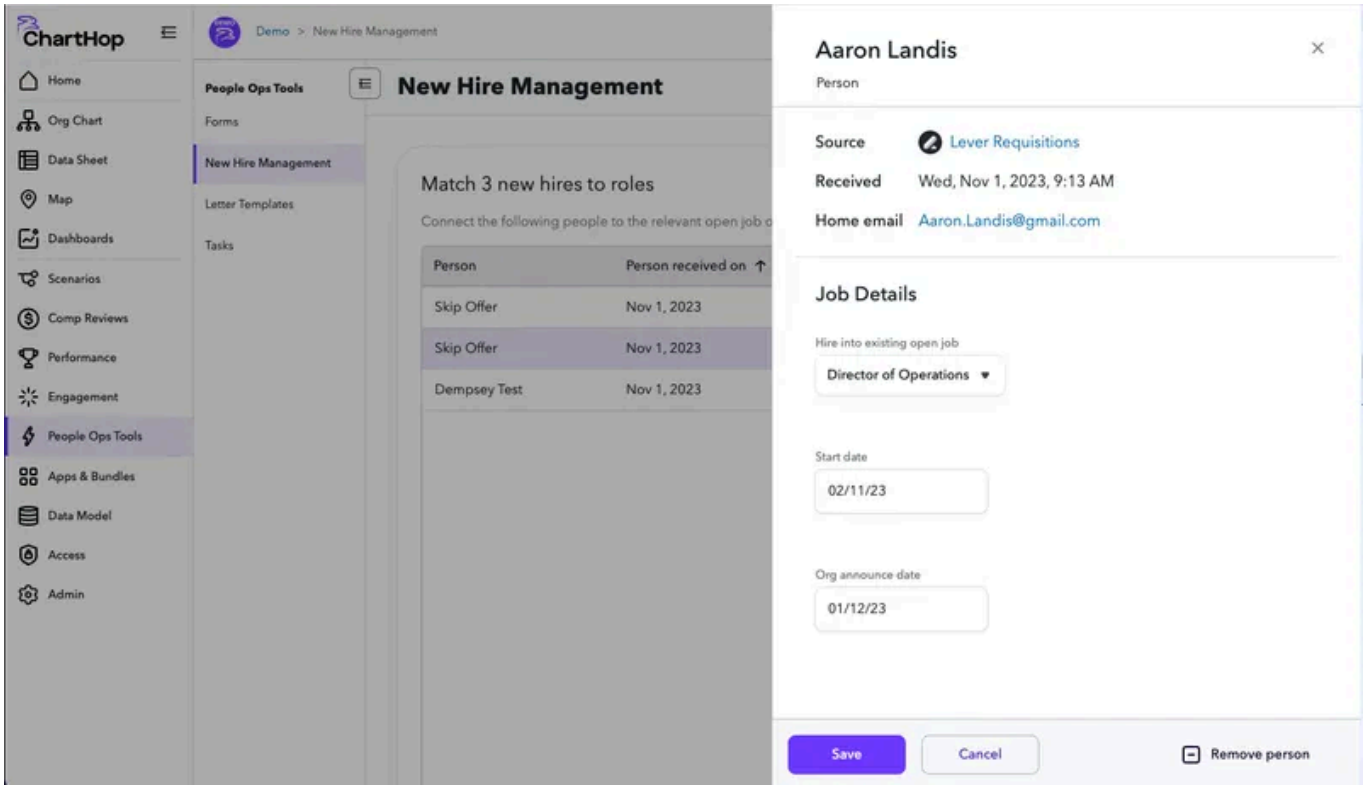


New Hire Management

To match a person an open job:

1. Find the person in the table and click **Match to job**

2. View the information imported from the ATS at the top of the drawer to verify that it is the correct person.
3. In the **Hire into existing open job,** select the open job that you want the employee to fill.
4. If availible, the **start date** set in your ATS will be imported. You can keep the imported date or update it.
5. You can also set the **Org announce date**, which is the day that the new hire will appear on the org chart and across ChartHop.
6. Click **Save** to save the match. They will now no longer show up in the New Hire Management page. You can now view the person by going to their job within ChartHop.



Matching a person to an open job

Removing a new hire

Sometimes hired candidates don't always work out or people are accidentally marked hired in the ATS.

If this happens and the person *was not* automatically matched to an Open Job, you can remove the new hire from the New Hire Management Page:

1. Find the person in the table and click **Match to job**

2. Click **[-] Remove person** in the bottom right corner.
3. Confirm that you want to remove the person.

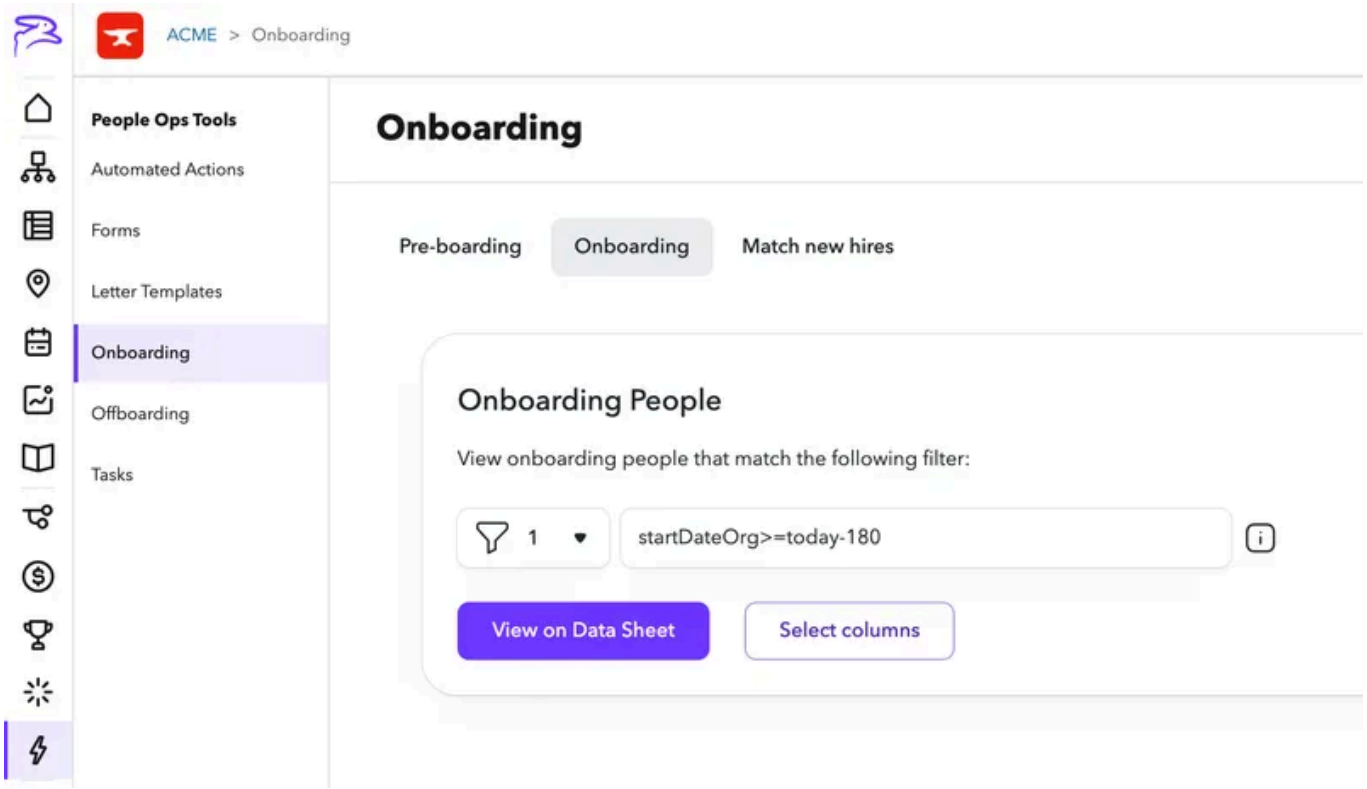
If this happens and the person *was* automatically matched to an Open Job, you can remove the person on the **Job History** tab of the **Profile**:

1. Go to the Person's profile and go to the **Job History** tab
2. Click the three dots next to "Started: Person name" and **delete** that change.

> **Roles**: Owner | Technical Owner | Recruiting Editor

5.10.3. Onboarding & Offboarding Pages

- Onboarding
  - Pre-boarding
    - Configure a data sheet of all people who are currently in pre-boarding
  - Onboarding
    - Configure a data sheet of all people who are currently onboarding
  - Match new hires
    - If new hires imported from your ATS are not matched to jobs, they will show up here.
- Offboarding
  - Configure a data sheet of all people who are currently in offboarding



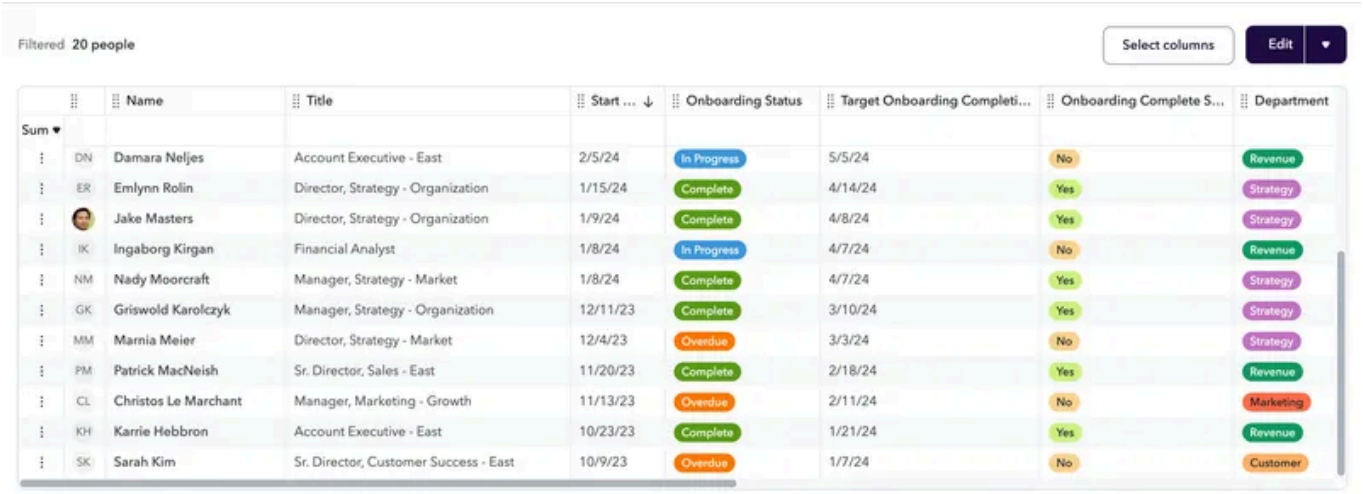
Setting up monitoring

Every organization has a different criteria for what they want to track during their pre-boarding, onboarding & offboarding process.

How to set up monitoring:

1. In the filter box, set the criteria for the people who should be considered to be in that stage. Examples:
    1. `startDateOrg>=today-90` will show all the people who started in the last 90 days.
    2. `onboardingStatus="In Progress"` will show all the people who have the custom field `onboardingStatus` listed as In Progress.
    3. `is:departing` will show all the people who are leaving the organization, but have not yet passed their end date.
2. In Select Columns, select all the ChartHop fields that are relevant to your Onboarding process. For example:
    1. Basic information like their contact information or who their Onboarding Buddy is.
    2. Required Information like documents that need to be uploaded or forms that need to be submitted.
3. Click view on data sheet to view an overview of your pre-boarding, onboarding and offboarding process.

To get a jumpstart on setting up custom fields you can use the **Onboarding Monitoring Bundle**.



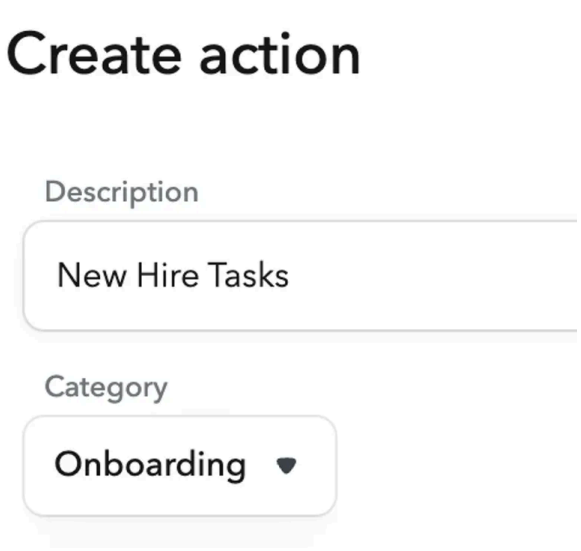
Example data sheet setup with Onboarding Monitoring Bundle

Onboarding & Offboarding Tasks

Using **Automated Actions**, you can send Onboarding and Offboarding tasks.

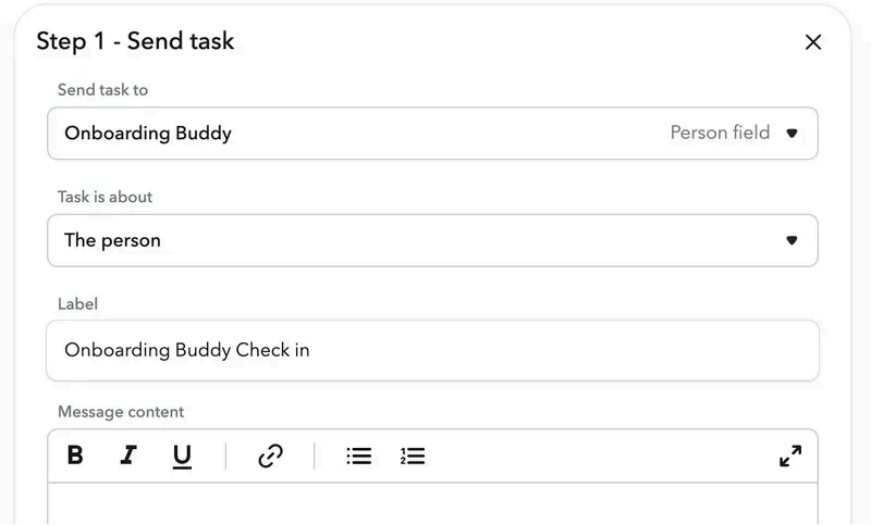
Setting up Tasks

Create an Action and within the action, select **Category > Onboarding or Offboarding.**

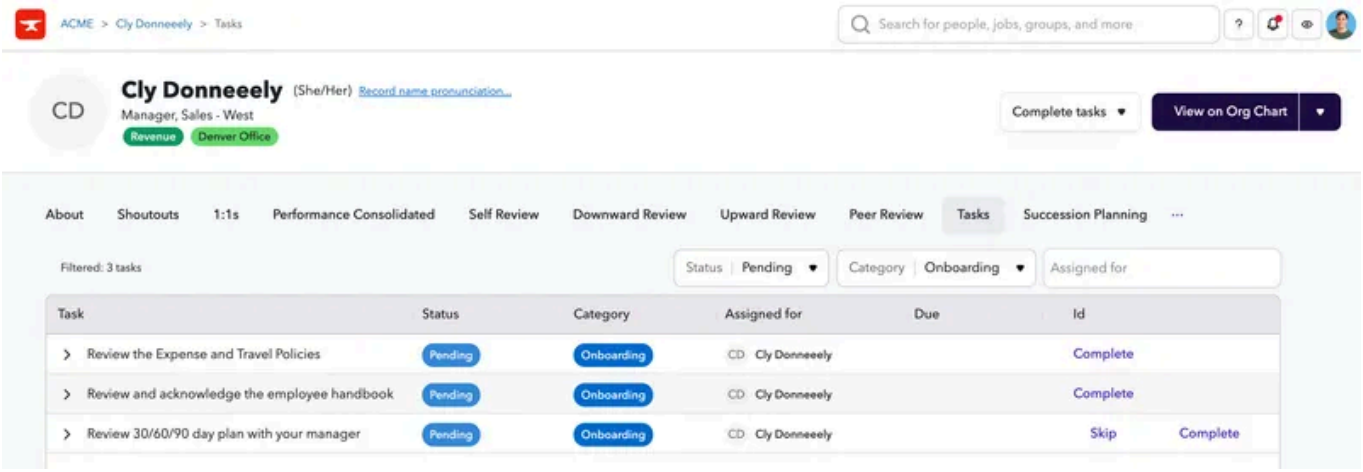


Set an appropriate **Automated Actions** for your Action.

Create a **Send Task** Action step and fill in the relevant details.

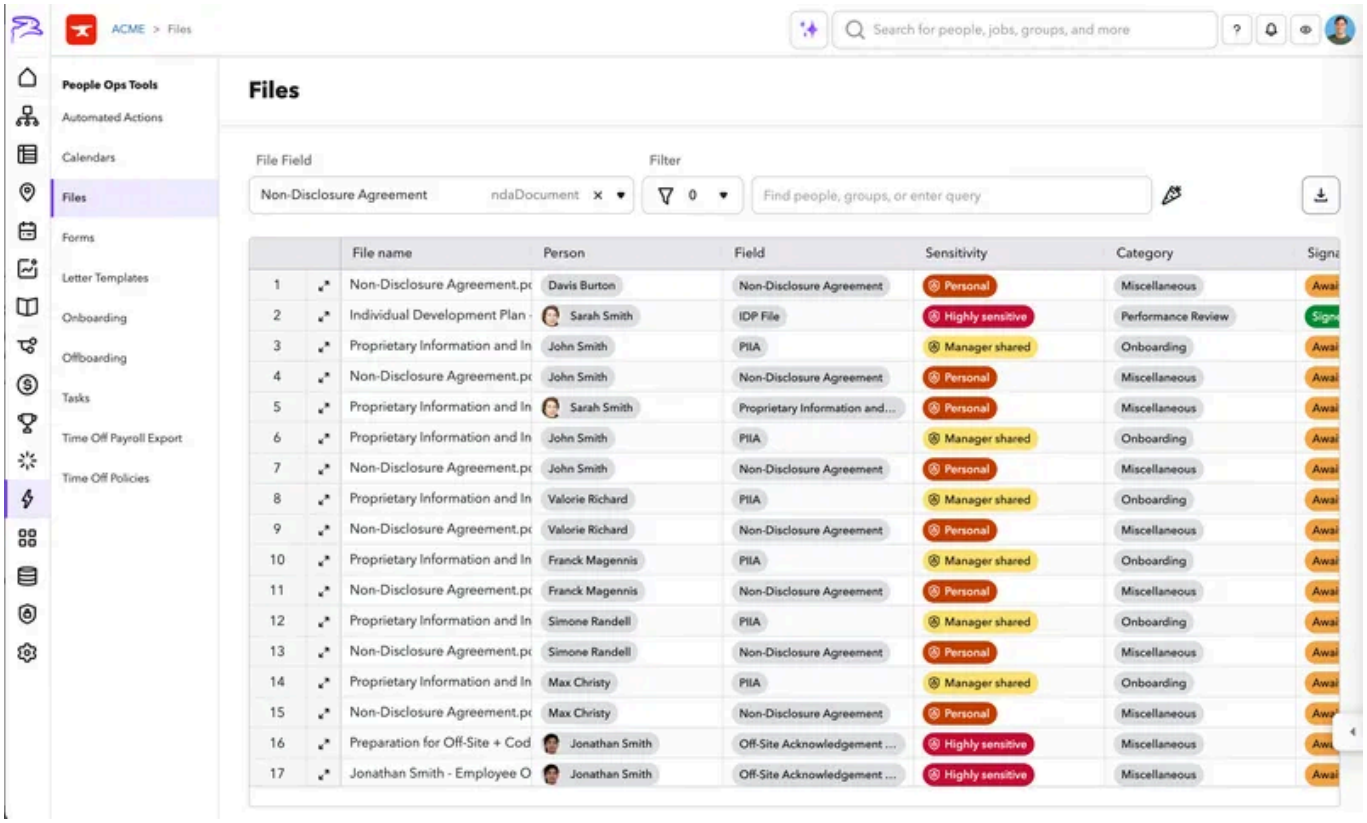


When sent, these tasks will be categorized as either Onboarding or Offboarding and can be filtered within the Tasks page on the profile.



Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.10.4. Files & Document management



File Organization

In ChartHop, documents are organized using **Fields** and **Categories**.

Create a new field for each type of document that you would like to categorize and store. Use a Category to group and organize the fields.

To create a new type of document that you would like to store:

1. Follow the instructions one **Creating custom fields**
2. For the **Data type,** select **File**.
3. Use the field **Label** to set the name of the document such as "Non-disclosure agreement"
4. Use the **Sensitivity** to set who should have access to the document.

Organization Best Practice

1. **Create a fields for every "File type" or "Document type" —** In other systems these may have been represented in folders or in the file name. Use a single field for the

general file type then upload multiple files to that field. For example: ✓ Commission Agreement | ✕ Commission Agreement Q1 FY25

2. **Place all file fields in a Categories**
    1. *Note that the file category name will be visible to all viewers of the file.*
3. **Only use "Miscellaneous" as a fallback**

Uploading documents

Upload a single document:

1. Navigate to the person's **Profile** who you would like to upload a document about.
2. Navigate to the **Files** tab.
3. Click the **Upload** button in the top right corner.
4. Select the **File** type — This dropdown will list all of the file fields that you have access to as well as **Miscellaneous** which are file that are not linked to a specific field, but can still be uploaded to the person's profile.
5. Drag & drop in your file or Browse to select it.
6. Click **Upload**.

Migrate or bulk upload documents

Reach out the ChartHop team if you need to upload documents in migrate or bulk upload documents. We can work with you on the best solution for your organization.

Supported file types

ChartHop supports uploading of:

- Document files - PDF, docx, ppt
- Images - png, jpg, gif

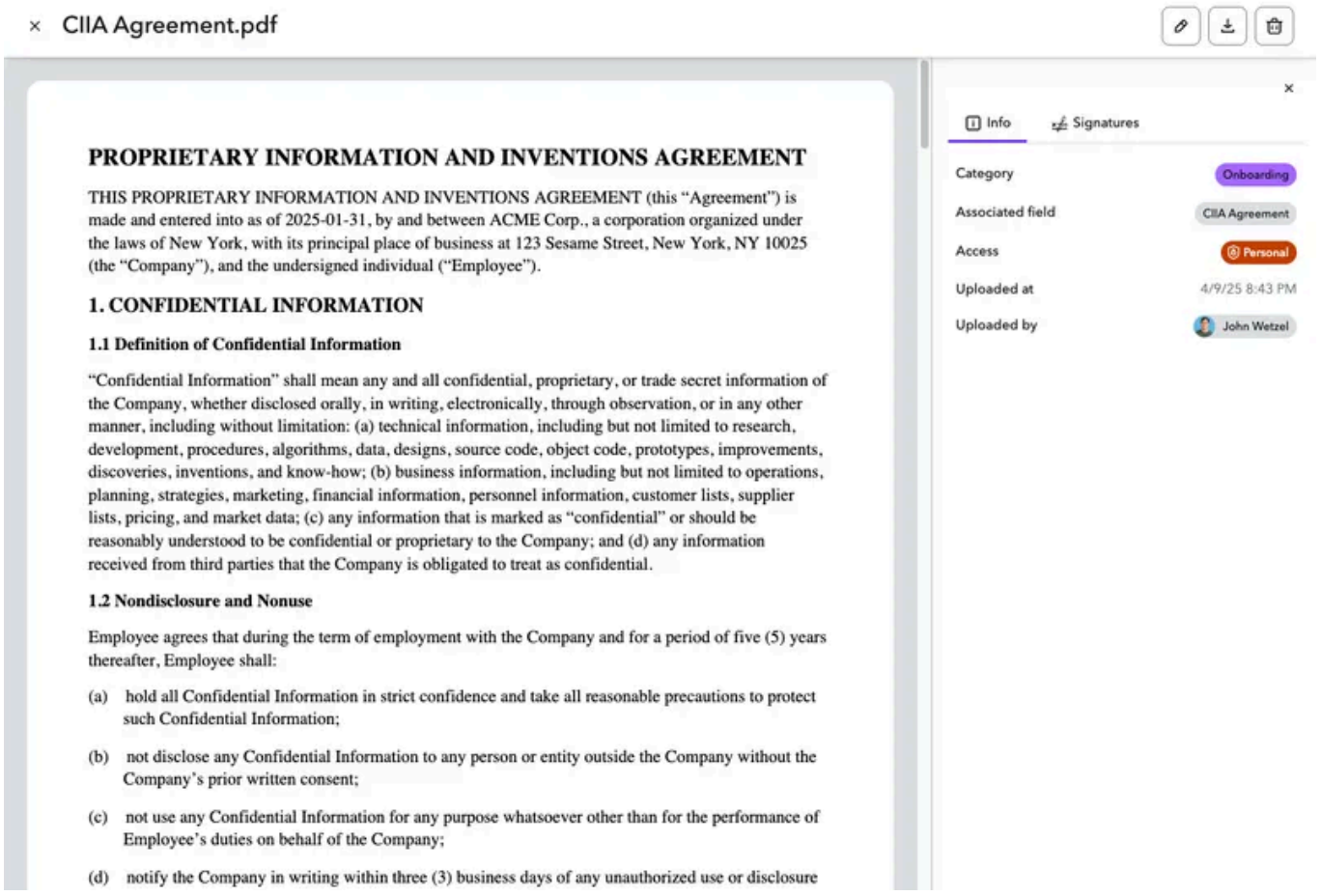
All files must be under 100 MB.

Viewing documents

The files page on an employee's profile, if it is enabled at your organization, will display important employee document and files.

To view a file:

1. Click the **document name** in the list of files.
2. A modal with appear with the document.
    1. If it is a PDF, you will see a preview of the file.
    2. Otherwise you can download the file to view it..
3. Additional document metadata can be view in the the right side such as when the document was uploaded.



Files page

Located under People Ops Tools > Files and availible to **Owner**s in ChartHop. This page allows you to view all of the files added to your ChartHop account.

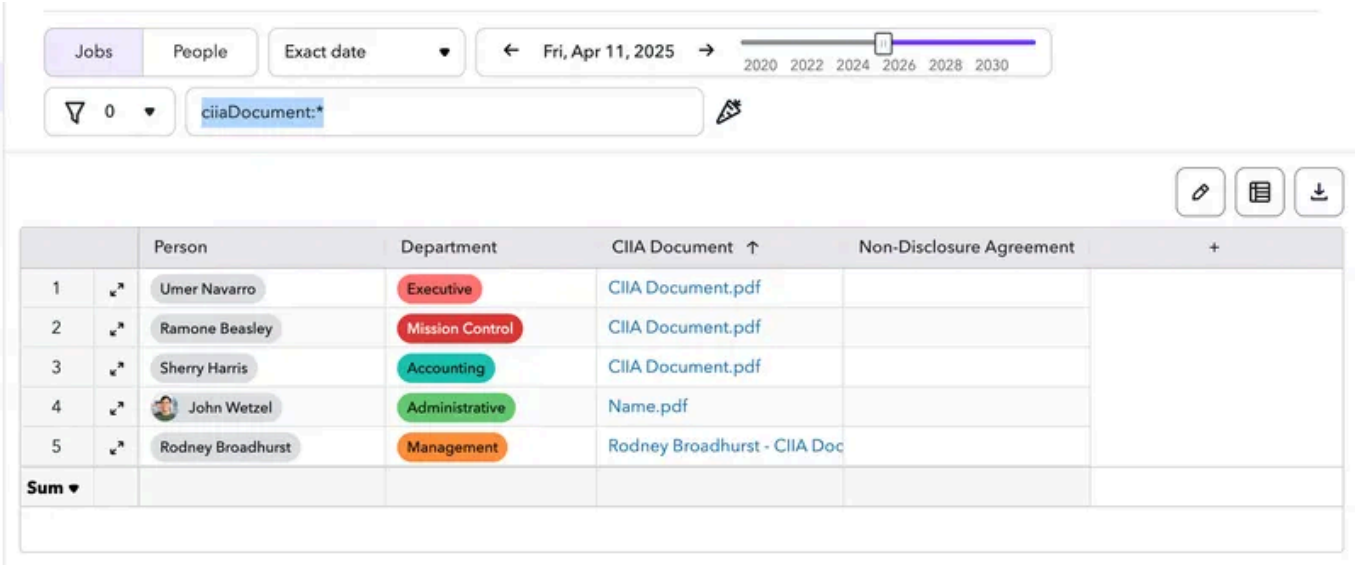
Auditing documents

Use Case	Tool
See who does and doesn't have a file of certain type. *"See who has a Commission Agreement"*	Add field as a column on the **Data Sheet**.
View all files of a specific type *"See all Commission Agreements"*	Files page
View all files for a certain person. *"View all of Sarah Smith's files"*	**Profile** Files tab or Files page for quick switching across people.

The **Data Sheet** can also be used to view if a person does or does not have a file.

To setup this data sheet to do this audit:

1. Add the file as a column to the data sheet.
2. Add a filter to the data sheet:
    1. `fieldCode:*` — to display all people with the document
    2. `fieldCode:!*` — to display all people without the document



Everyone with the CIIA document

Editing document information

Once you are viewing a document, you can edit the document's name and associated field.

To edit a document's information:

1. Click on the file name in the File tab of the profile
2. Click the ✏ **Edit** button in the top right corner.
3. Edit the metadata such as name, linked field or access level.

Collecting documents from employees

To collect documents from employees you can use the same methods as you use to collect fields: **Forms** or **Edit Person Modal**.

Exporting documents

Docuents can be downloaded as a zip file from the Files tab on the profile.

Documents can also be downloaded using the Files page.

To export documents from the Files page:

1. Navigate to **People Ops Tools > Files**
2. **Filter** to the view of the files you would like
3. **Click** the download icon in the top right corner.
4. Select either **Export CSV** or **Export Files as Zip**
    1. **Export CSV -** Will export a csv of all of the info about the files in ChartHop, but not the files themselves.
    2. **Export Files as Zip -** Will export a zip file of all of the files in the view.

5.10.5. Signatures

Packages: Basic | **HRIS** | Headcount Planning | Compensation Reviews | **Performance** | Engagement

This is an overview for admins on how to request signatures and manage signature requests. See **Signing a document** for information on signing a document.



Request a signature

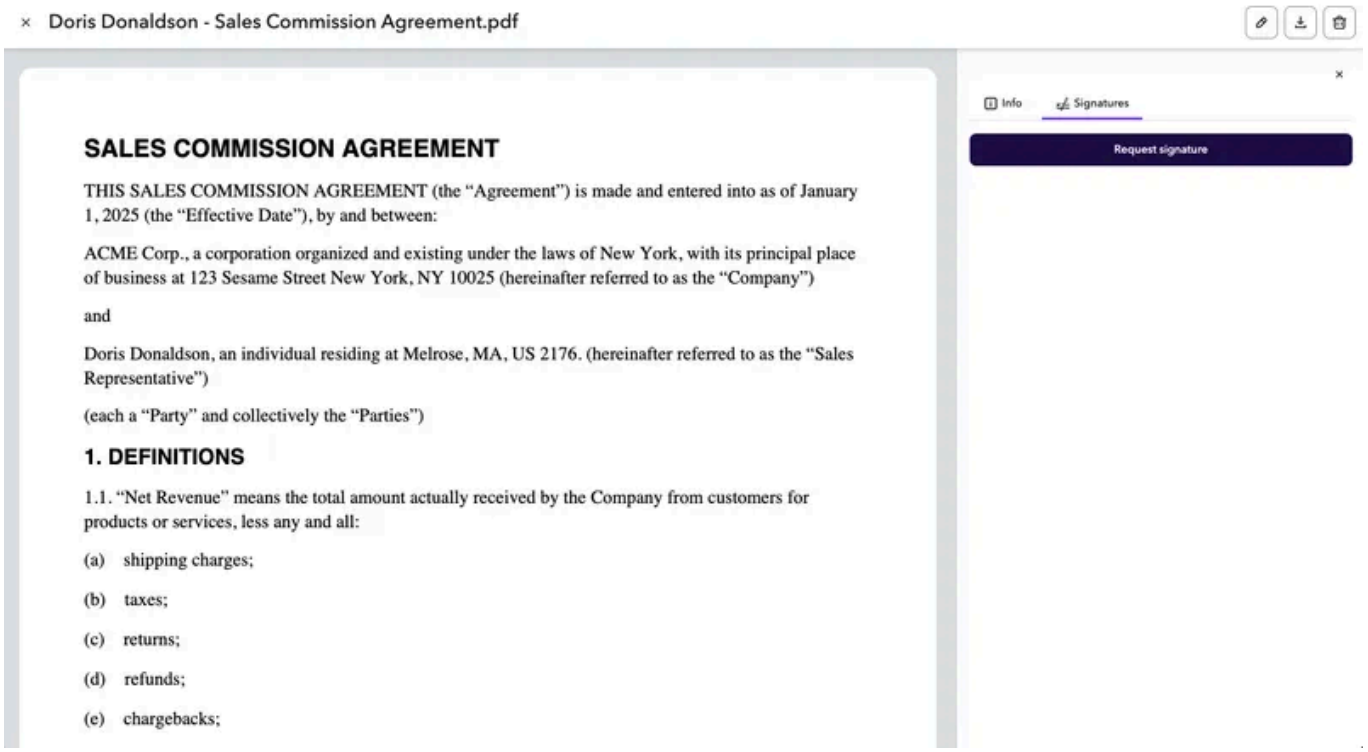
There are several ways that you can request a signature on a document depending on the workflow you are trying to support.

Currently the only built in user roles that have the ability to request signatures are:

- **Owner**
- **Org editor**
- **People Ops Admin**
- **People Ops Admin (no comp data)**

    - *Note that files containing compensation information should be categorized as part of the "Compensation" category in order for them to be blocked from users with this role.*

- **People Ops Admin (no sensitive data)**

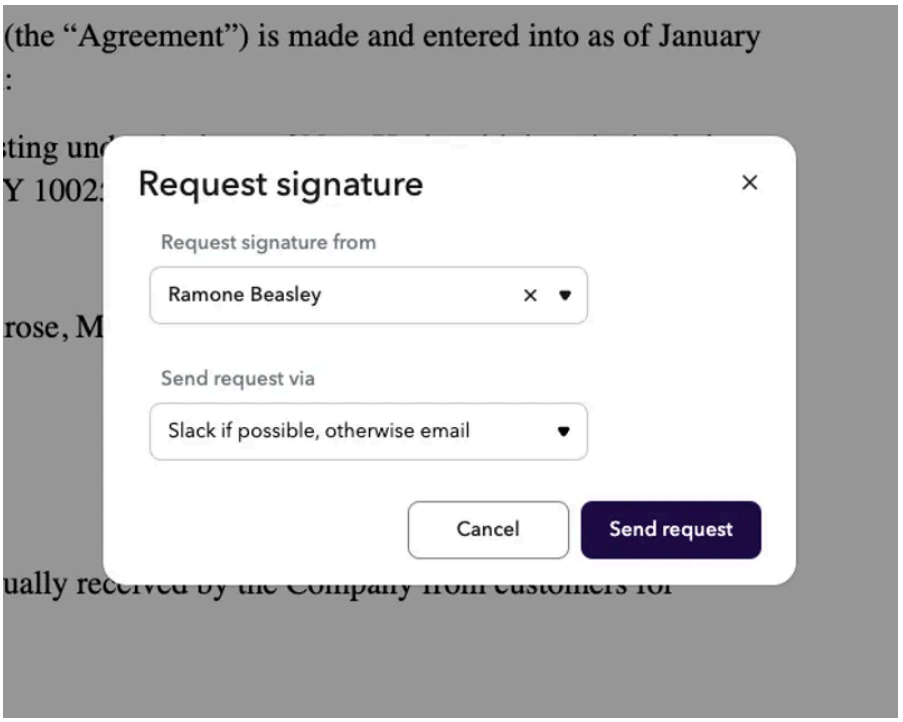


Request via the profile

The simplest way to request a signature is to do so via a file stored on the person's profile.

To request a signature via the profile

1. Navigate to the **Files** tab within the profile.
2. Upload the document that you would like to have signed or select a document you previously uploaded.
3. Within the document viewer, navigate to the **Signatures tab** on the right info panel
4. Click **Request signature**
5. Then select who you would like to request a signature from
6. Select **Send request.** The person will then be notified and will have a task on the ChartHop home page.

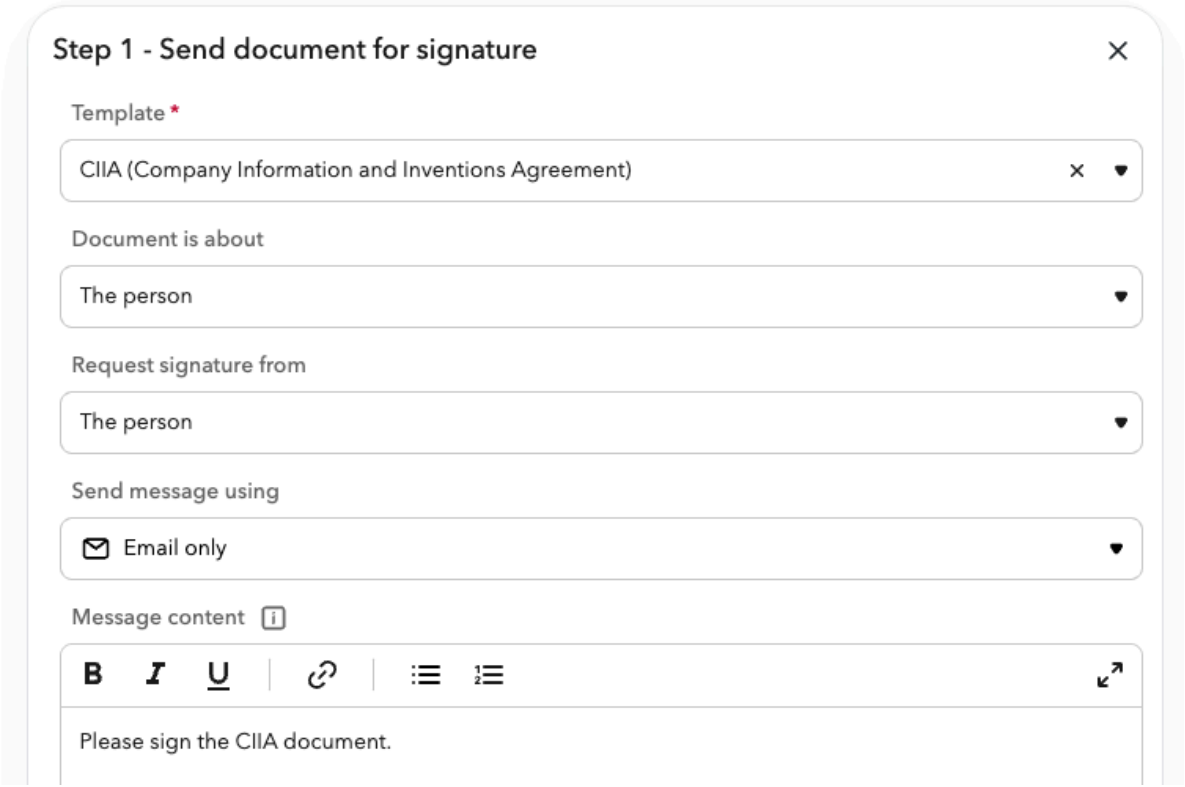


Request via an Automated Action

The **Send Document for Signature** step within an automated action allows you to request a signature on either a generated template (such as a promotion letter) or a uploaded PDF (such as an employee handbook).

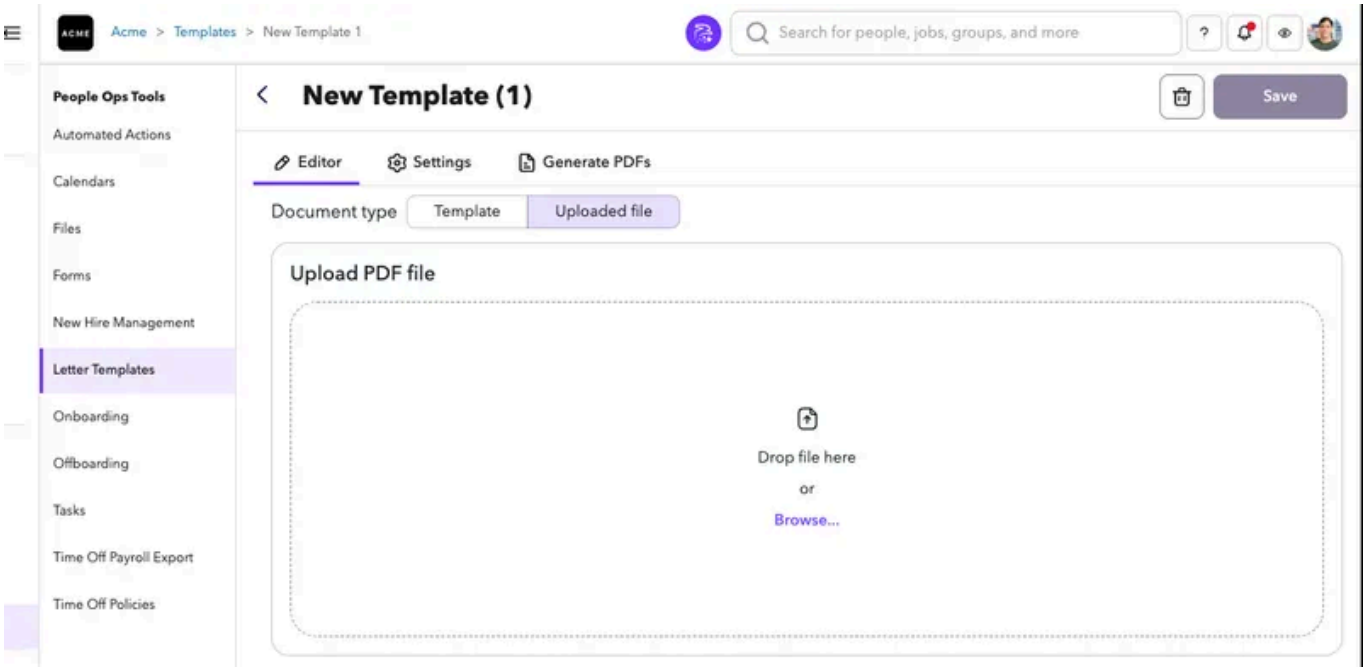
Prerequisites:

1. Create a **File** field that the document will be stored to
2. Create a **Letter template** with the document
3. Link the File and the Letter template
4. Select the template within the action.



Request a signature on a PDF

1. Set up you [Letter template] as a template using the **Document Type: Uploaded file** option.
2. Follow the instructions above for linking the [File] field and configuring the the [Request a signature] action step.



Request a signature on a Template

1. Set up you **Letter template** as a template using **carrot** for variables and format the document as you would like.
2. Follow the instructions above for linking the **File** field and configuring the the **Request a signature** action step.

Signing a document in ChartHop

For a guide on the signing expeience see: **Signing a document**

Canceling a signature request



If you need to make changes to the document or need to cancel the signature request for any reason, you may do so before it has been signed. Anyone with the ability to request signatures can also cancel signature requests.

To cancel a signature request:

1. Navigate to the **Files** tab within the profile.
2. Navigate to the document that is **Awaiting signature.**
3. Within the document viewer, navigate to the **Signatures tab** on the right info panel
4. Click the **Cancel request** button.
5. Confirm that you would like to cancel the request by clicking **Cancel request** in the dialog.

FAQ

What files types are supported?

Currently, you can only request a signature on a PDF file.

How many people can sign the document?

Multiple people can sign the document. Just add the signatories when setting up the request. Currently the order of signing is not enforced, so all people will receive the request to sign at the same time.

Which name can users sign with?

The signee can sign with any case sensitive combination of their `First Name` or `Preferred First Name` and their `Last Name` or `Preferred Last Name.` See more information on ChartHop's **Name** fields.

Who can sign documents?

Current, documents can only be signed by people who currently can login to ChartHop.

Common documents to have signed in ChartHop

- Acknowledgement of Legal or Company Policies (Attendance, Anti-sexual harassment, etc.)
- Onboarding / Offboarding Paperwork
- Promotion Letters
- Compensation Letters
- Performance Improvement Plans (PIPs)
- Acknowledgement of having read Employee Handbook
- Offer Letters
- Separation Agreement
- PIIA or CIIA Document

- Sales Commission Plan
- Relocation/Transfer agreement
- Qualifications, Training or Acredidations

5.10.5.1. Qualified Electronic Signatures (QES)

ChartHop Signatures currently follow the requiremest for simple electronic signature (SES) out of the box, but support for **Qualified Electronic Signatures (QES)** can be added via an add on.

If you require **Qualified Electronic Signatures (QES)** in order of comply with the EUs eIDAS regulation, ChartHop can add support for this for a fee. Please contact the ChartHop team for pricing and to get this setup for your account.

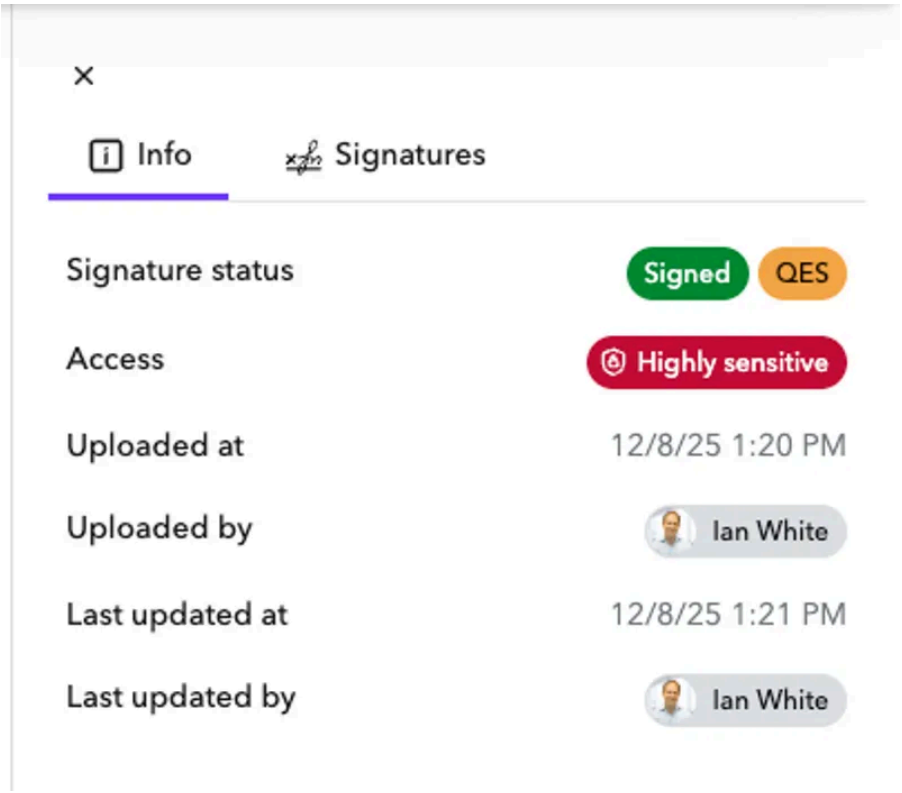
About QES in ChartHop

ChartHop offers QES via an integration with **BoldSign**.

After QES has been turned on via **QES Settings**, when someone who should be using QES clicks the link to sign a document, they will be taken to a hosted Boldsign page to sign.

Once they have signed, they will be redirected to ChartHop and their signed document will be saved to their ChartHop profile after the last signature is complete.

When a document has been signed with QES you will see a `QES` tag next to the status and a `QES` info note in the signature section:





QES Settings

Once QES has been added to your account, you will see a QES Signatures page under **Admin > QES Signatures**.

The settings page will display:

1. **Usage Tracking** — A tracker of usage depending on how many QES signatures you have used and purchased in your add on.
2. **Signature Configuration — When to use QES**
    1. **Always** - for all signatures
    2. **For people matching a filter** - for example `!address.country:US` will use QES only for people who live outside of the US.

3. **Never** - disable QES (Default to start)



5.10.5.2. About ChartHop Signatures

Signatures in ChartHop are legally binding e-signature that is in complicance with the United States Electronic Signatures in Global and National Commerce Act (E-Sign Act).

Signature Block & Identifiers

When all signers have signed the document, it is "fully executed." On the document you will see two details imprinted:

ChartHop Signed {ID} — Unique Signature request identifier

This ID provides tracability for the signature back to ChartHop's electronic records. It is required for e-signature compliance.



Signature Block

The signature block is meant to mirror a typical signature section of a document. It contains 4 piece of information:

1. **Signed name** — this is the exact name that the signer used to sign the document. So if Jonathan "Jon" Smith signed with their preferred first name "Jon", then "Jon Smith" will be displayed.
2. **Job title** — this is the user's current job title in ChartHop at the time that they signed the document.
3. **Date & time of signature** — This is when the document was signed in the organization's default timezone.
4. **Unique signature identifier** — This is a unique ID that allows the signature to be linked to the document and signature request in ChartHop's records. It is required for e-

signature compliance.



Signature Block

Signature compliance details

By default ChartHop's signature process qualifies as an simple electronic signature (SES). To align with the requirements of SES, the signing experience and signature includes the following:

Intent to sign — The signer in ChartHop must type their name and click the "Sign Document" button both of which are signals of intent to sign.

Consent — By logging into ChartHop to review and sign the document, the user is consenting to use electronic signatures. Text below the signature box also lists: "All parties agree that this document may be signed electronically."

Record retention — ChartHop records a unique signature request ID that is imprinted at the top of each PDF with the text: "ChartHop Signed {ID}." At any time, that ID could be retreived by ChartHop to retreve the record of the signature. The signature request can tell you: the Time and date the signature was created and who requested it.

Association with the record — The signature consists of 4 elements: A graphic represtation of the signee's name, the signee's job title (if applicable), the date and time of signature in the organization's default time zone, and a ChartHop signature id. The ChartHop signature id is a generated string that identifies the signature and associates it with the specific document.

Opt-out clause — The signer has the ability to **decline to sign** by selecting the: "Decline to sign" option adjacent to the "Sign Document" button. Instructions on how to decline to sign are availible in the ChartHop documention.

Signed copies — All signers will receive an email with a fully executed copy of the document attached. The signed documents are also availible for download within ChartHop. For more details see **view your signed document**.

ChartHop also supports **Qualified Electronic Signatures (QES)** via an add on. Contact the ChartHop team if you would like to add QES.

ChartHop Signature uses

CharHop signatures are great for use cases where simple electronic signature or **Qualified Electronic Signatures (QES)** may be used. For documents where "Advanced" electronic signature are needed, please work with a different provider for now.

ChartHop Signatures should also not be used for any documents that may not permitted to be signed electronically, whether by law or otherwise, such as:

i. Wills, codicils and testamentary trusts

ii. Court documents

iii. Family law documents

iv. Where prohibited by contract

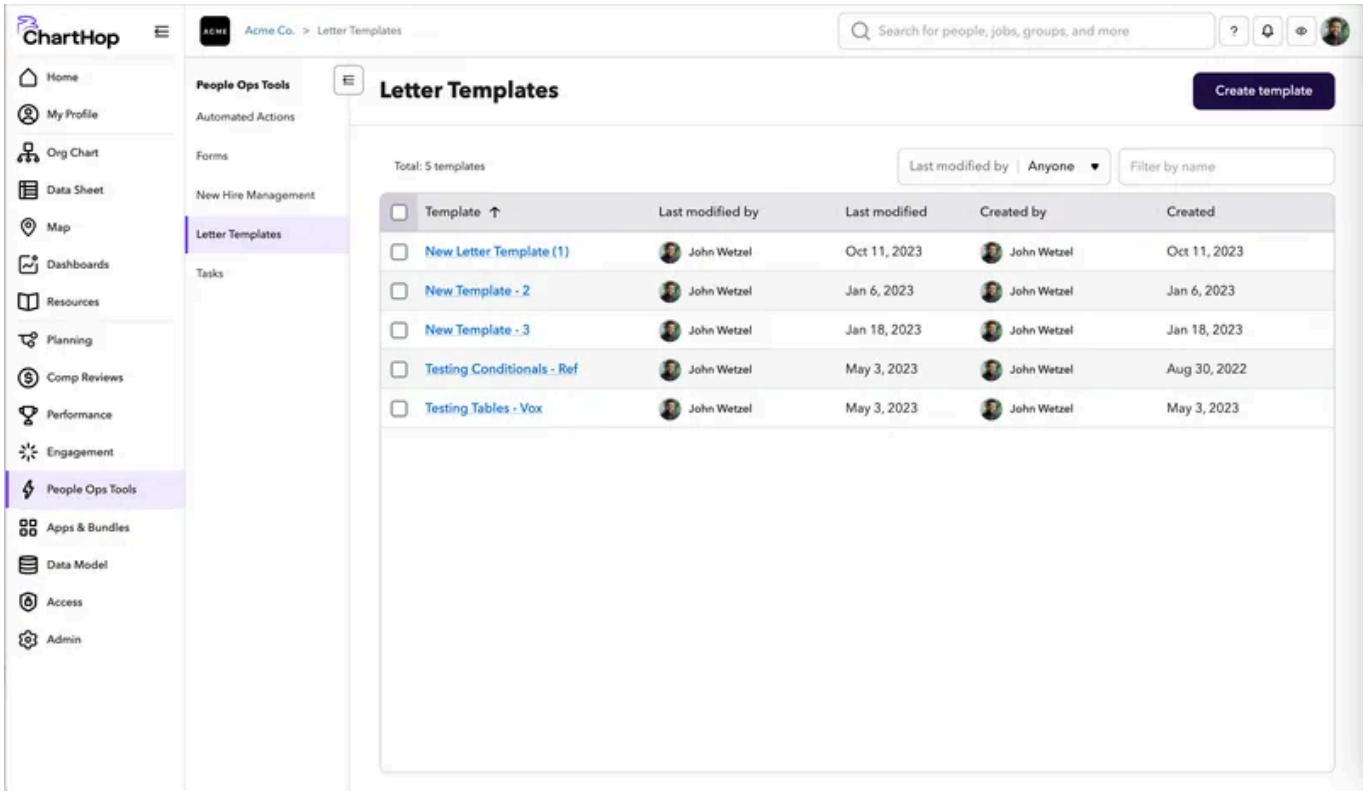
v. Where both parties have not provided consent

5.10.6. Letter templates

You can use ChartHop Letter templates to create standard and reusable PDF documents such as compensation letters, hiring offers, and proofs of employment for your organization.

Like a mail-merge, you can insert people or job data dynamically from your ChartHop organization, allowing you to leverage dynamically-generated information such as employee names, titles, addresses, base salaries, compensation levels, and more.

You can access existing templates and create new ones from the Templates page. The page allows you to sort your list of templates and filter by who last modified a template or who created it.



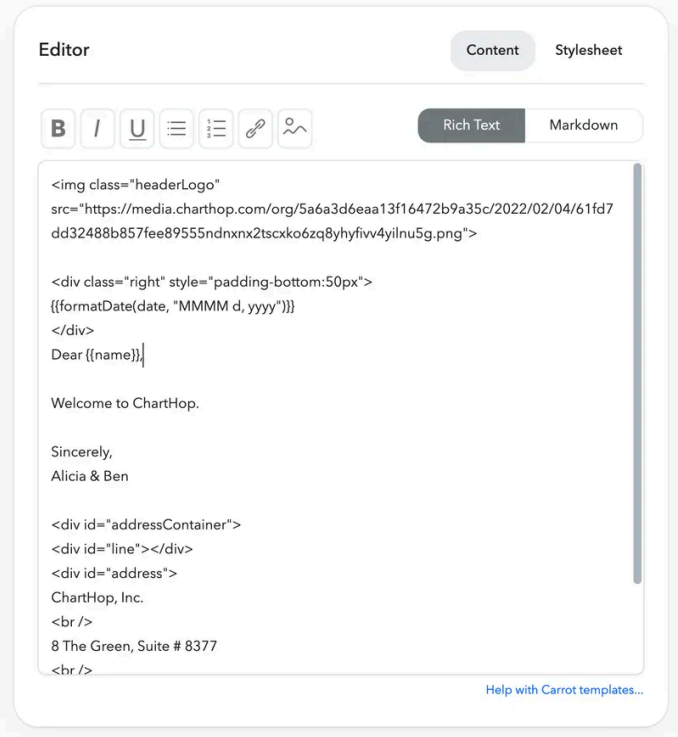
Packages: Basic | **Standard** | **Premium**

Roles: Owner | Technical Owner

5.10.6.1. Creating templates

You can create a new template from scratch or duplicate an existing template if you want to re-use an existing template.

You'll need to have an intermediate knowledge of HTMl and CSS. Here are some examples to get your started. Learn more.



Create a new template

To create a template:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select **Create Template**.
4. Name your template by selecting the default template name and editing the text.
5. In the **Editor**, author your content using:
    - **Content**: Create and edit your message with the rich text editor, or with Markdown.
    - **Stylesheet**: Apply CSS stylings to your template. For styling ideas you can check out some of the ones used in our example templates. Learn more.

6. Select **Save**.

> For more complex templates, or for assistance with any template, **contact a ChartHop representative**.

Duplicate an existing template

You can duplicate an existing template if you want to create a new template that is based on something that you've created already.

To duplicate a template:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. On the **Letter Templates** page, select the check box of the template you want to duplicate.
4. Select **Duplicate** from the toolbar. The duplicate template is created and the name is appended with Copy 1, Copy 2, and so on.
5. Select the duplicated template to view it in the editor and rename it.

5.10.6.1.1. Using Carrot to reference org data

You can use Carrot to reference information from your ChartHop organization, such as compensation data, groups, or specific employee data, and reference it directly in your templates as dynamically-generated fields. **Learn more**.

Useful Carrot expressions

The following section features a list of helpful Carrot expressions available to you and illustrates how you can use them in your templates.

Specify date formats

When using any of Carrot's date fields, such as `startDatePlanned` and so on, you need to specify the date format if you want something different from the default, which is YYYY-MM-DD.

If you use `{{startDatePlanned}}` without any indication of how you want it formatted, the date is formatted as such: YYYY-MM-DD or 2022-03-14.

If you'd like to format your dates differently from the default, you'll need to use something like this: `{{formatDate(startDatePlanned, "MMMM d, yyyy")}}`. This date is formatted as such: March 14, 2022.

Learn more.

Substitutions

You can use `{{curlyBraces}}` to substitute any Carrot expression in the body of your template.

```
Hello there {{name.first}} {{name.last}}!

You work in the {{department}} department, based out of the {{location}} location.
```

If condition

You can use the `if` tag to conditionally display a piece of content.

`{% if expression %} conditional content {% endif %}`

```
{% if department:engineering %}
You are part of the Engineering department.
{% endif %}
```

If... elseif / else

You can use `elsif` or `else` to add additional conditions to an `if` condition block.

```
{% if department:engineering %}
You are part of the Engineering department.
{% elsif department:marketing %}
You are part of the Marketing department.
{% else %}
You are part of a different department.
{% endif %}
```

For loops (iterations)

You can use the `for` tag to iterate through a series of objects.

```
{% for grant in grants %}
Stock grant dated: {{grant.date}}, amount is {{grant.shares}}
{% endfor %}
```

5.10.6.1.2. Example Templates

Below is a collection of sample templates you can use for your organization. To use them, create a new template, copy the code examples from the editors below, and add them to your new empty template.

Adding stylings

You can add content using HTML or Markdown, as well as add styling to your templates using CSS. Templates can use both traditional CSS as well as an alternative form of CSS called *Page Media CSS*. **Learn more**.

Welcome letter



Welcome letter template

Content

```
<img class="headerLogo" src="https://media.charthop.com/org/5a6a3d6eaa13f16472b9a35c/202
<div class="right" style="padding-bottom:50px">
{{formatDate(date, "MMMM d, yyyy")}}
</div>
Dear {{name}},

Welcome to {{org.name}}!

We are very excited to have you be a part of our {{department}} team and we look forward

We are all here to help and so if you have any questions or needs, please don't hestitate

Sincerely,
Joy & Steve
<div id="addressContainer">
<div id="line"></div>
<div id="address">
Your Org, Inc.
<br />
8 The Green, Suite # 8377
<br />
Dover, DE 19901
<br /> 
</div>
</div>
```

Styling

```css
body {
  font-family: muliregular;
  font-size: 14px;
  margin: 0 20px;
}

.headerLogo {
  display:block;
  margin: 0 auto 20px auto;
  width: 250px;
}

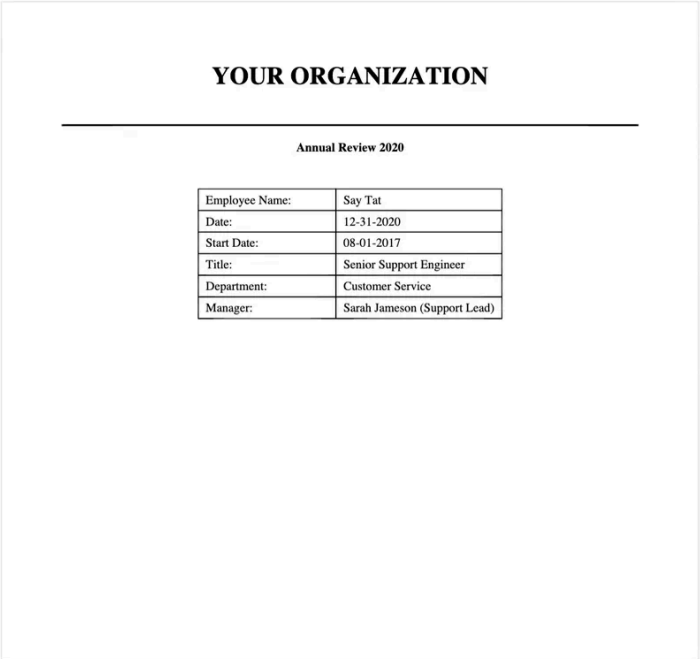
#line {
  border-top: 1px solid #cccccc;
  padding-bottom: 20px;
}

.right {
  text-align: right;
}

#addressContainer {
  width: 700px;
  position: fixed;
  bottom: -120px;
  height: 200px;
  text-align: right;
  right: 0;
}

#address {
  position: fixed;
  right: 0;
  color: #2e5d84;
  width: 200px;
  font-weight: 700;
}
```

Information table



YOUR ORGANIZATION

Annual Review 2020

Employee Name:	Say Tat
Date:	12-31-2020
Start Date:	08-01-2017
Title:	Senior Support Engineer
Department:	Customer Service
Manager:	Sarah Jameson (Support Lead)

Table example

Content

```
# Your Organization

<hr style="margin-top: 40px; border-width: 2px;" />

### Annual Review 2020

<table id="summary">
<tr>
<td>Employee Name:</td>
<td>{{name}}</td>
</tr>
<tr>
<td>Date:</td>
<td>12-31-2020</td>
</tr>
<tr>
<td>Start Date:</td>
<td>{{formatDate(personStartDate, "MM-dd-yyyy")}}</td>
</tr>
<tr>
<td>Title:</td>
<td>{{title}}</td>
</tr>
<tr>
<td>Department:</td>
<td>{{department}}</td>
</tr>
<tr>
<td>Manager:</td>
<td>{{manager}}</td>
</tr>
</table>
```

Styling

```css
body {
  font-family: Courier New, sans-serif;
}

hr {
  border-top: 1px;
}

h1 {
  text-transform: uppercase;
  text-align: center;
 font-family: Georgia;
}

h2 {
  font-size: 16px;
  page-break-before: always;
  text-align: center;
}

h3 {
  font-size: 16px;
  margin-top: 40px;
}

h4 {
  text-align: center;
}

table {
  border-collapse: collapse;
  border: 0px;
}

#summary td, #comp th, #comp td {
  padding: 4px;
  border: 1px solid black;
}

#summary, #comp {
  margin: 40px auto;
}
```

```
#summary td {
  padding: 4px 8px;
  min-width: 140px;
  text-align: left;
}

@page:right{
  @bottom-center {
    content: counter(page) " of " counter(pages);
  }
}

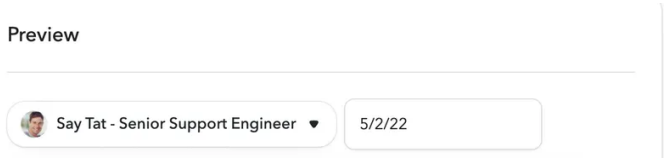
body {
  font-family: muliregular;
  font-size: 14px;
  margin: 0 20px;
}

.headerLogo {
  display:block;
  margin: 0 auto 50px auto;
  width: 250px;
}
```

5.10.6.2. Preview a template

You can preview how your template displays. Previewing allows you to select a particular user and preview how the data is presented.

When you preview, select a particular employee and a date when you expect the template information to be current. For example, if you are previewing a template that informs an employee from the Engineering department that he will be promoted on a certain date, choose that employee and the effective date of the promotion.



To preview a template:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select a template from the template list. The template preview automatically display in the **Preview** section.
4. In the **Preview** section, select an employee or role from the employee dropdown list.
5. Select a date from the date picker.
6. Your template then automatically displays both elements in the **Preview** section.

5.10.6.3. Update a template

After creating a template, you can update its name, content, and styling at any time.

To update a template:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select the template you wish to update from the template list.
4. Make your changes to the template:
    - **Content**: Make edits to the template itself using HTML or Markdown in the template editor.
    - **Style**: Make edits to the template's styling using CSS or Page Media CSS.
    - **Template name**: Update the name of your template by selecting the Pencil icon, or by selecting the default template name and editing the text.
5. Select **Save** when finished.

5.10.6.4. Deleting templates

You can permanently delete templates from your template list if you no longer need a template.

To delete a template or templates:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. On the Templates page, select the check box of the template you want to delete. You can select more than one template to delete.
4. Select **Delete** from the toolbar.
5. Type "delete" in the confirmation dialog and select **Confirm**.

5.10.6.5. Generating PDF documents

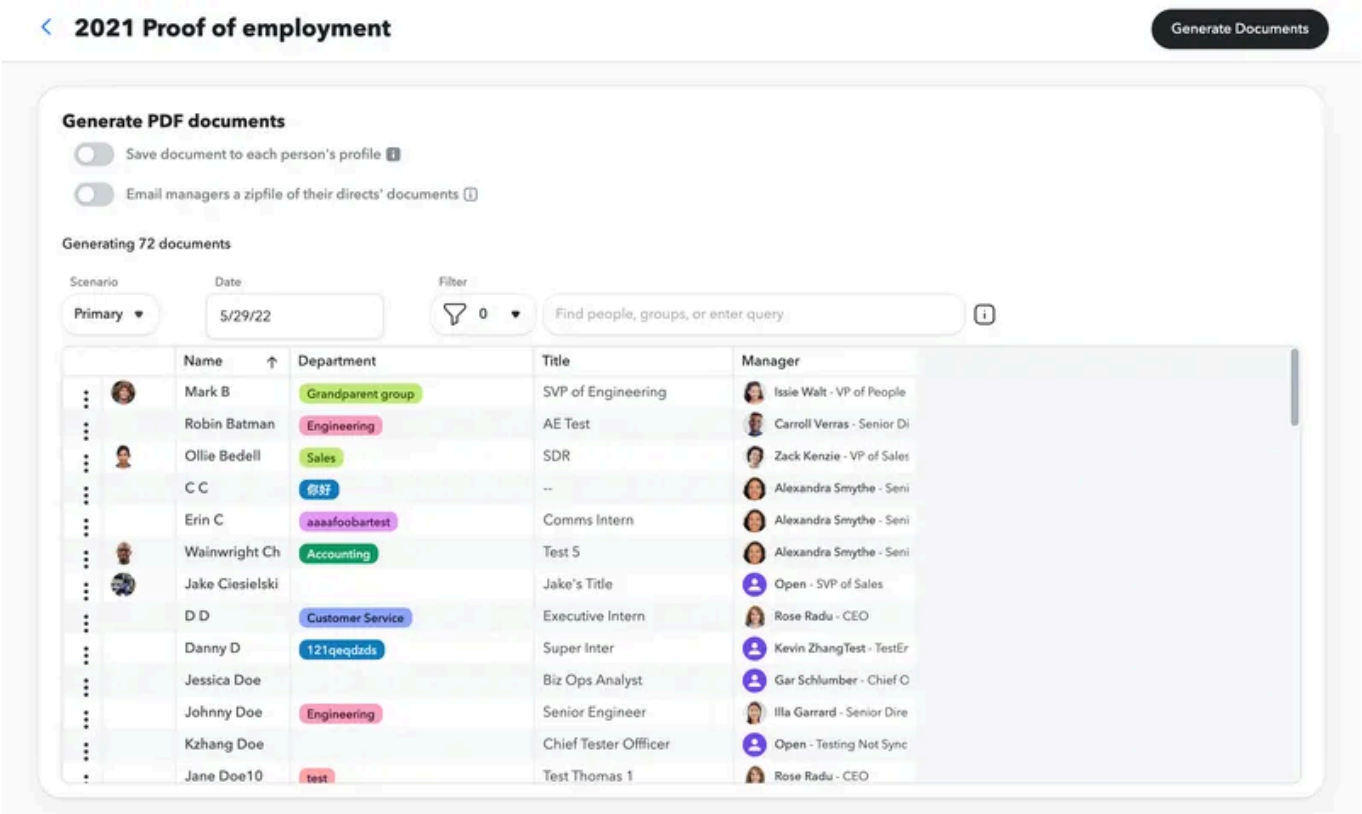
You can generate and send ChartHop documents in PDF format to employees.

You can generate single documents or decide to create multiple at once.

Depending on how you want to distribute the PDFs you are generating, you can choose from several options:

- Save the file to the employee's profile page. You can also include an emailed copy to the employee and their manager when using this option if you like.
- Email the respective manager a set of all their direct reports' PDFs.
- Download the PDFs for your records.

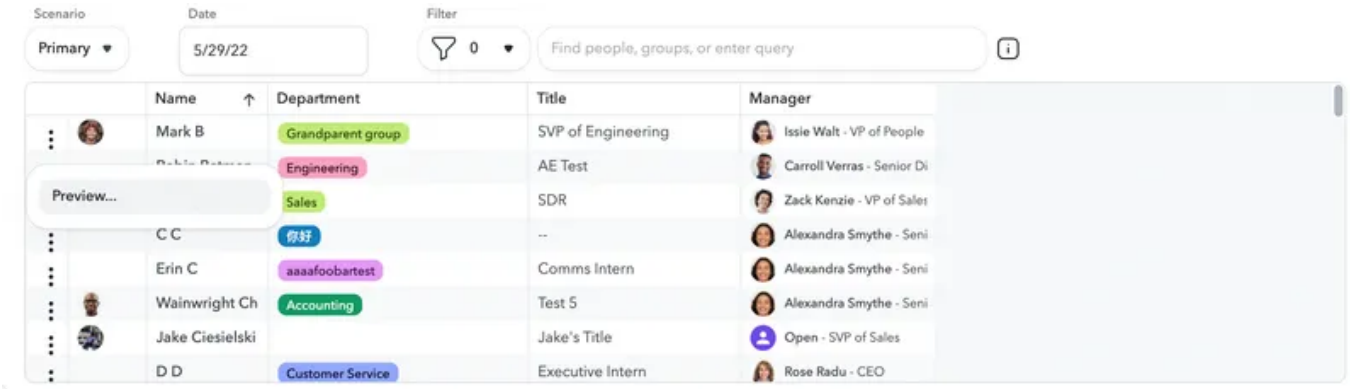
When you generate a document, you can decide the date you want to use on the letter and which employees you want to generate documents for.



Preview your document

Previewing how your PDFs will look before sending them out allows you to verify that you are sending what you expect.

You can preview a document for a particular employee. You can preview as many employees as you'd like, one at a time, before choosing to generate your PDF documents.



To preview a final version of a document:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select the template you wish to generate from the template list.
4. Select the **Generate PDFs** at the top right of the page.
5. In the **Generate PDF documents** page, select a **Scenario** to view. This option defaults to your primary org, which includes current employees.
6. Set the **Date** you want to use for the document.
7. Select **Preview...** from the left action menu for any employee.

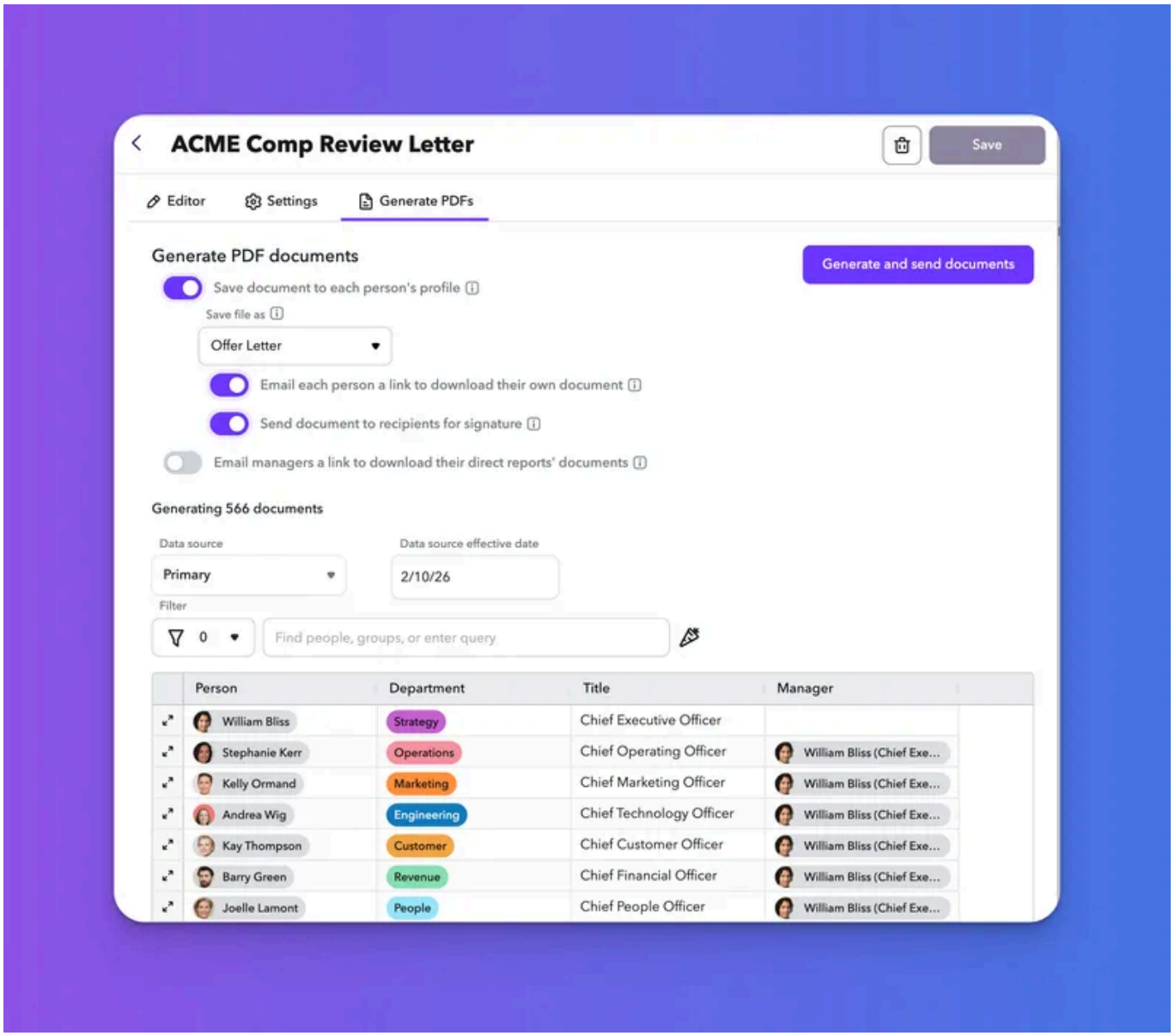
Generate PDF documents to download

By default, you can generate a document and have it download to your personal computer. When you generate a document you can decide what effective date you want to use as well as filter on which employees you want to generate documents for.

To generate a PDF document:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select the template you wish to generate from the template list.
4. Select the **Generate PDFs** at the top right of the page.
5. In the **Generate PDF documents** page, select a **Scenario** to view. This option defaults to your primary org, which includes current employees.

6. Set the **Date** you want to use for the document.
7. Create a filter that defines the list of employees you want to generate documents for. You can either use the Filter dialog or type a query in the box provided.
8. Verify that the number of documents to be generated is correct. This number is above the toolbar after you complete your filter. If no filter is used, a document will be generated for every employee.
9. Select **Generate Documents**.
10. Select **Download Documents** when the generation task completes.



Generating PDFs

Saving documents to an employee's profile and sending generated documents for Signature

You can generate PDFs from letter templates and make them available on each employee's profile. You can also email documents directly to employees and send documents for signature. Generated documents appear in the **Files** tab on the employee's profile. Emails are sent to the employee's work email address.

In order to attach files to Employee profiles, the files are associated with a field with the File data type. ChartHop provides three built-in fields to use. Each of these are named Miscellaneous and have different field data sensitivity levels. You can also create your own custom field to hold files. **Learn more.**

The built-in fields are the following:

- **Miscellaneous (Highly sensitive)**: The document may only be viewed by a manager level role and above.
- **Miscellaneous (Manager-only)**: The document may only be viewed by a manager.
- **Miscellaneous (Manager-shared)**: The document may be viewed by both an employee and their manager.

To save a document to a person's profile:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select the template you wish to generate from the template list.
4. Select the **Generate PDFs** at the top right of the page.
5. In the **Generate PDF documents** page, select a **Scenario** to view. This option defaults to your primary org, which includes current employees.
6. Set the **Date** you want to use for the document.
7. Create a filter that defines the list of employees you want to generate documents for. You can either use the Filter dialog or type a query in the box provided.
8. Verify that the number of documents to be generated is correct. This number is above the toolbar after you complete your filter. If no filter is used, a document will be generated for every employee.
9. Enable the **Save document to each person's profile** option.
10. In the **Save file as** drop down, select a sensitivity level to determine who can see the attached file.

- **Miscellaneous (Highly sensitive)**: The document may only be viewed by a manager level role and above.
- **Miscellaneous (Manager-only)**: The document may only be viewed by a manager.
- **Miscellaneous (Manager-shared)**: The document may be viewed by both an employee and their manager.
  - **Email each person a link to download their own**: When enabled, will email both the employee and the employee's manager individual documents.
- **Custom field(s)**: Choose from any listed custom field and the file will inherit the settings of whichever sensitivity level was assigned to the particular field.

11. (Optional) Enable **Email each person a link to download their own document**. When enabled, the employee and their manager receive a link to the generated document.
12. (Optional) Enable **Send document to recipients for signature**. When enabled, the document is sent to the employee for signature using ChartHop's native signing experience.
13. Select **Generate and Send Documents**.

Emailing a direct report's documents to a manager

If you prefer that your PDFs are distributed by the employee's manager or that the manager receive the files separately, you can email a link of the generated PDFs directly to the respective employees' manager. For security purposes, the manager will have to login to ChartHop to download the files.

To send employee reports to direct managers:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Letter Templates.**
3. Select the template you wish to generate from the template list.
4. Select the **Generate PDFs** at the top right of the page.
5. In the **Generate PDF documents** page, select a **Scenario** to view. This option defaults to your primary org, which includes current employees.

6. Set the **Date** you want to use for the document.
7. Create a filter that defines the list of employees you want to generate documents for. You can either use the Filter dialog or type a query in the box provided.
8. Verify that the number of documents to be generated is correct. This number is above the toolbar after you complete your filter. If no filter is used, a document will be generated for every employee.
9. Enable the **Email managers a link of their directs' documents** option.
10. Select **Generate and Send Documents**.

Manager experience

- The document will send to the person's manager as of effective date, not the current manager.
  (For example, if during a comp cycle it will send to the manager at the start of the comp cycle.)
- The manager must be an active **user** within ChartHop, so that they can login and access the document files.
- The Managers will receive a link to login to ChartHop and download a zip file of their direct reports' documents.

5.10.7. Managing tasks

Tasks in ChartHop help you track whether an employee has taken a specific action or not such as completing a form or submitting an approval.

Tasks are generated by **Reviews**, **Actions**, **Compensation Reviews** or **Scenario Approvals**.

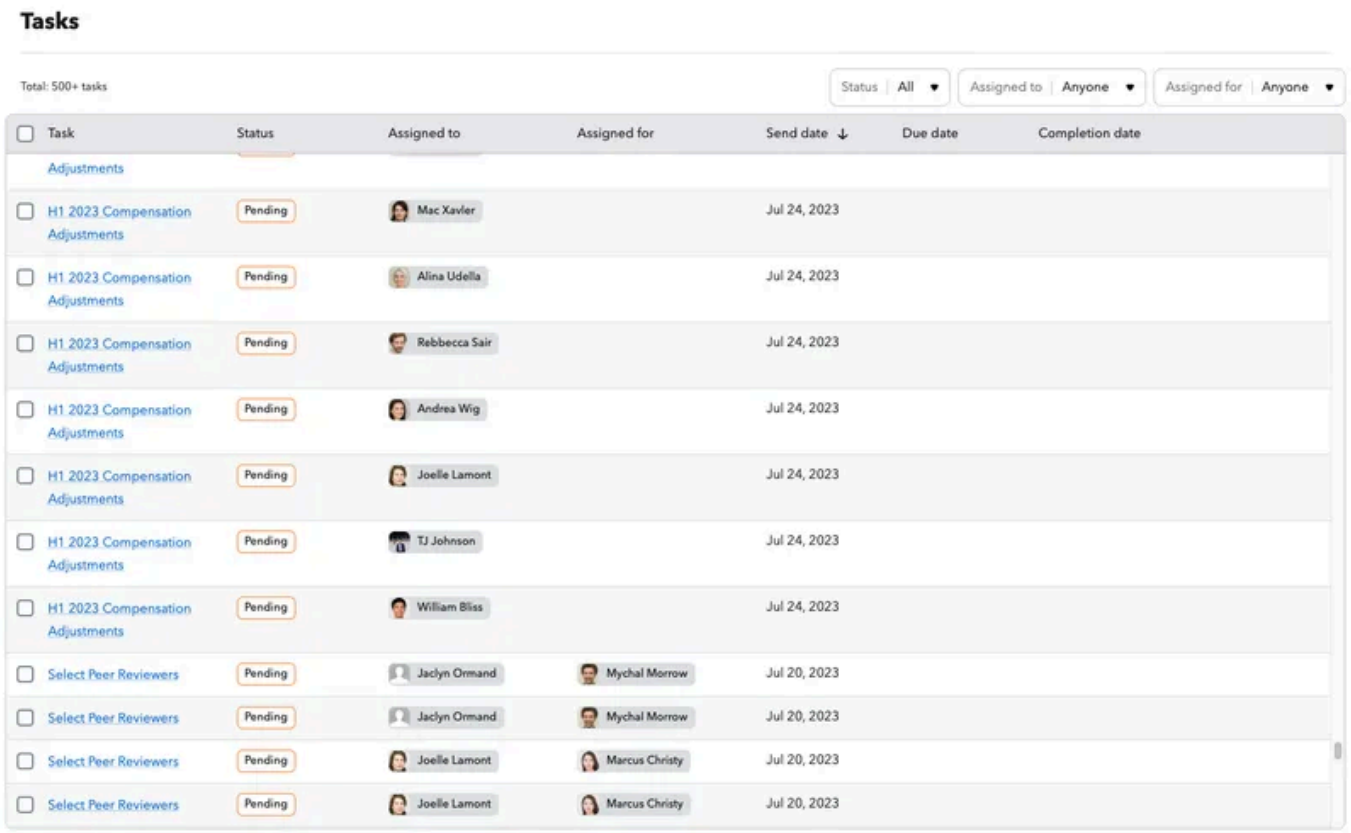
Users with the Owner, Technical owner, or `task:read` and `task:delete` permissions can use the Tasks page to manage all of the Tasks in your account.

To access the **Tasks** page:

1. From the left sidebar, select **People Ops Tools.**
2. From the sub-menu, select **Tasks.**

On this page, you can:

- **View & Filter Tasks**
- **Delete Tasks**
- **Send Reminders for Incomplete Tasks**



Tasks Page

View and Filter Tasks

View tasks

- Clicking the name of the task will redirect you to the associated form or scenario
- Clicking the column headers will sort the list of tasks

Filter tasks

Select one of the filters above the table to refine your list



Tasks filters

By Status

Status	Description
All	All of the below statuses
Pending	The action requested by the task has not yet been completed
Done	The action requested by the task has been completed
Skipped	The task has been skipped and therefore will not be completed.
Expired	The task was not completed, and no longer can be completed because of time limits or action taken by an admin *For example, the compensation review has closed.*

By who the task is "Assigned to"

This is the person who is responsible for completing the task.

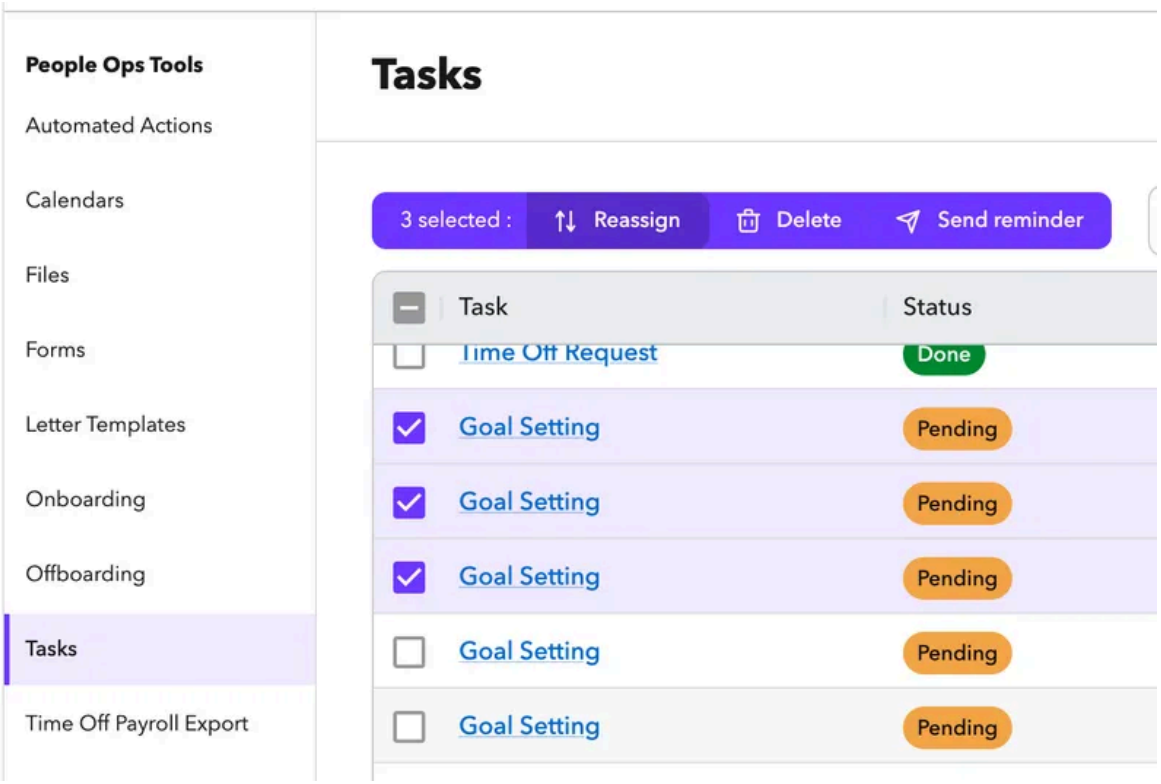
For example, if David needs to fill out a peer review for Sherry then David would be listed here.

Filter by who the task is "Assigned for"

This is the person who the task is about.

For example, if David needs to fill out a peer review for Sherry then Sherry would be listed here.

This will be blank if the task is not for a specific person.



Reassign Tasks

If you have a task that needs to be completed by for example, a new manager, you can reassign it to any users.

Only certainly tasks can be reassigned:

The tasks must be `Pending` and one of the following types:

- Submit Form
- Time off approval
- **Signatures** - *The signature request will be updated with the new person*
- **Tasks created by actions**

Notably not supported are:

- Form response approvals
- Form response resubmissions (after changes are requested)
- Scenario approvals
- Comp review approvals.

Delete Tasks

1. Select the checkmarks on the left side of the page to select tasks that you want to delete.
2. Click the **Delete** action at the option at the top of the page
3. Confirm that you want to delete the tasks.

Send reminders for incomplete tasks

1. Select the checkmarks on the left side of the page to select taks that you want to send reminders for.
   Note: you cannot send reminders for tasks that are Complete.
2. Click the **Send reminder** action at the option at the top of the page
3. Add in a custom message to include with the reminder.
4. Click “Send Reminder” to send.


Delete or send reminders for tasks

Bulk actions for tasks

5.10.8. Time off for admins

The following sections detail everything you need to know about ChartHop's Time off product:

Implementing Time Off - For new customers who are building out policies in ChartHop and importing new data.

Maintaining time off - For troubleshooting, correcting and fixing issues that may arise once you are using ChartHop Time Off

Time off policy settings - For understanding what each of the settings mean and how they interact.

Time off payroll export - For viewing and exporting any time off data

5.10.8.1. Implementing Time Off

When you transition to using Time Off in ChartHop, we will rebuild employee request history for the current policy year. This allows for previous requests to be edited even if they weren't requested in ChartHop.

There are two components to implementing time off: ChartHop setup and internal enablement.

ChartHop Setup

Starting balance

Since carryover was handled in a different system, administrators will upload employees' starting balance of policy balance + carryover from the previous year.

You can access the CSV file by creating a time off policy → adjustments → import balance. This will give you a CSV with employee names, personId, and a column for the updated balance.

Request history

We will then upload your employees' request history. We recommend doing this by country to make it easier to review data.

For requests that span the policy year from the last year (`example: I'm transitioning to ChartHop in 2025, but have requests that span from 12/2024-1/2025`), the requests need to be split into different rows.

Example: A request from 12/24/2024-1/3/2025 would be split into two rows on the CSV upload:

`12/24/2024-12/31/2024`

`1/1/2025-1/3/2025`

Column Header	Description
`contact.workEmail`	Unique identifier for employees
`timeOffPolicyName`	The time off policy requests apply to
`timeOffStartDate`	Start date of time off request
`timeOffEndDate`	End date of time off request
`timeOffDays`	Number of days requested
`timeOffApproval`	Approval status: APPROVED, PENDING, REJECTED, CANCELED, SUPERCEDED

Uploading requests

Requests can be uploaded once a time off policy is ACTIVE. Verify filters and ensure all employees are encapsulated.

Upload requests via our importer in admin → Import spreadsheet data

Troubleshooting tips

- Requests were uploaded and say "Non ChartHop policy"
  - Verify that the employee was in an active policy at the time of upload
- No balances were changed
  - Check that the policy was set to "limited"
  - Verify that you are uploading a different value than the starting balance

Internal Enablement

We recommend setting a cutoff date — the date at which employees will stop requesting time off in their old system, and when they will start requesting in ChartHop.

In the setup process, your team will determine a cutoff date. After that date, no more requests will be made in your old system.

By that date, all requests will be uploaded into ChartHop — any last-minute requests can be uploaded or re-requested in ChartHop.

See **Enablement examples** for emails to send to employees and managers

5.10.8.1.1. Enablement examples

ChartHop can help make enablement easier! We've provided example emails you can send to your employees to help the transition.

Email to All Employees

Subject: Upcoming Change: Our New Time Off System

Hi Team,

We're excited to share that we're making improvements to how you request and track time off!

Starting [effective date], we'll be transitioning to ChartHop for time off requests. This platform will provide a more intuitive experience, better visibility into your time off balances, and faster approvals.

Here's what you need to know:

- All future time off requests will be submitted through ChartHop
- Your existing balances will carry over automatically

In the meantime, please continue using our current system through [last day of old system use].

If you have any questions, feel free to reach out to [HR contact name/email].

Thanks for your patience as we work to improve your experience!

Best,
[Your Name]
[Your Title]

Email to Managers Only

Subject: Manager Action Needed: Transitioning to New Time Off System

Hi Managers,

As part of our efforts to streamline HR processes and improve visibility into team availability, we're transitioning to ChartHop for time off as of [effective date].

Here's what you need to know:

- Your team's balances and requests will automatically migrate.
- You'll begin approving time off through ChartHop starting [date].

Action Required:

- Attend the brief training session on [date/time or link to recording] *(Recommended if company uses this approach)*
- Review your team's balances and ensure all pending requests are up to date in the current system by [cutoff date]

This new platform will help you manage team schedules more efficiently and cut down on manual work. If you have any questions or need support, please reach out to [HR contact name/email].

Thanks in advance for your leadership in making this transition a success.

Best,
[Your Name]
[Your Title]

5.10.8.2. Time off policy settings

This page contains all of the time off policy settings:

Balances

You can create time off policies with unlimited or upfront balances in ChartHop.

Time off types

ChartHop includes a set list of time off types

```
PTO
Sick
Bereavement
Vacation
Jury Duty
Parental Leave
Medical Leave
In-Lieu
Offsite
Unpaid
Short-term disability
Long-term disability
Military Leave
Religious Leave
Voting
Volunteer
Unknown
```

- PTO
- Sick
- Bereavement
- Vacation
- Jury Duty

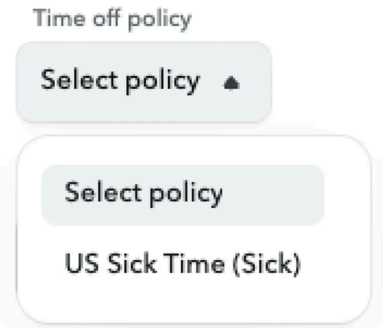
- Parental Leave
- Medical Leave
- In-Lieu
- Offsite
- Unpaid
- Short-term disability
- Long-term disability
- Military Leave
- Religious Leave
- Voting
- Volunteer
- Unknown

Confuguring Policies

To create a policy, name the policy on the top of the page. Employees will see the name of the policy and the type when they request time off.



What employees see:



Proration

Policies with an upfront balance will be prorated for employees if they start mid-year. The calculation is based on the number of days the employee will work in the remaining calendar year.

These balances can be rounded based on any of the following rounding settings

- **Do Not Round** `(8.415 → 8.42)` *[Rounds to the nearest 100th.]*
- **Round Up to the Next Full Day** `(8.415 → 9)`
- **Round Up from 0.5, Round Down Below 0.5** `(8.415 → 8)`
- **Round Up to the Nearest Half Day** `(8.415 → 8.5` *[if half days are enabled]*

Example:

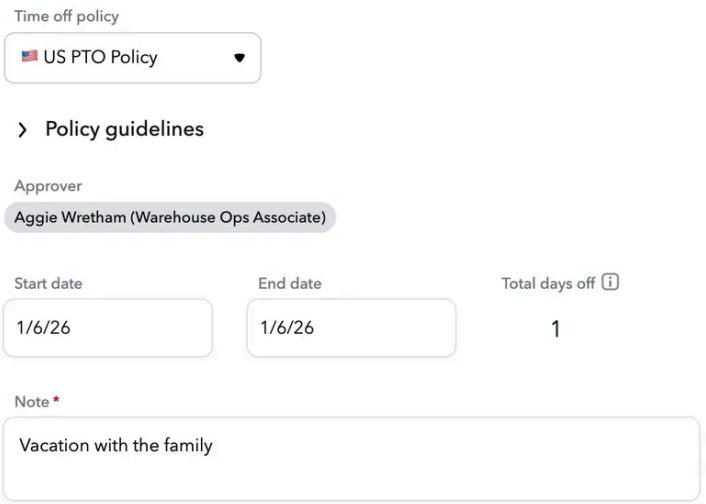
```
An employee gets an upfront balance of 20 days a year for a policy that
starts on January 1. They start on June 17th. This means the employee will
work 197 days of the year, or 53.97% of the year.
```

```
20 days (upfront balance) * .5397 (percentage of year worked) = 10.794
Rounding is set to "Round Up to the Next Full Day" so 10.794 rounds to 11.
```

Require note

Check this box to require that people add a written note when submitting a time off request.

Without it they are still able to add a note, but it will be an optional field.



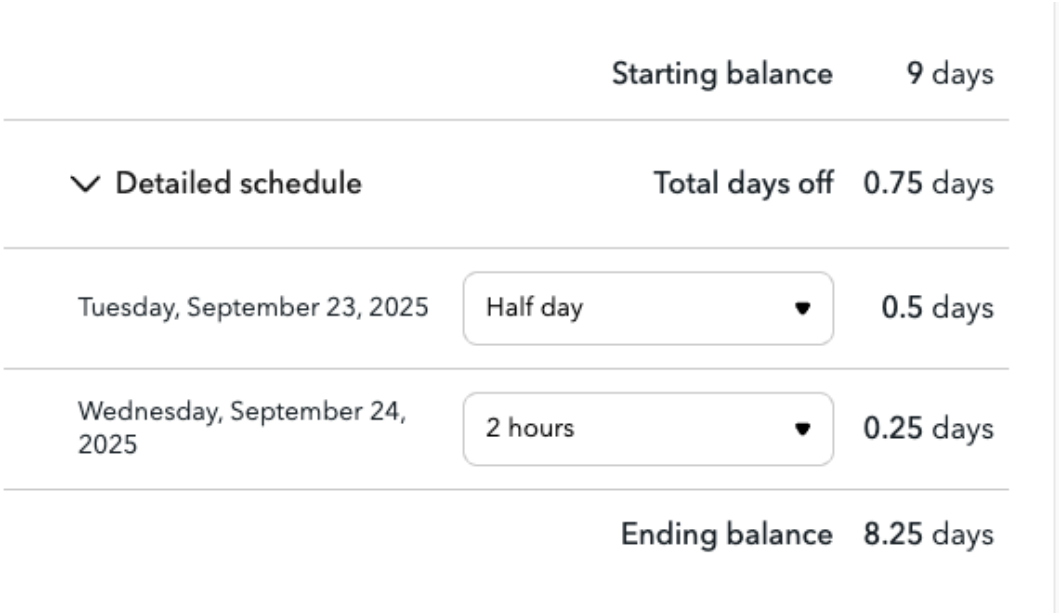
Allow partial day requests

Check this box to allow people to request in increments smaller than one full day. You can then select a **Shortest period that can be requested.** Here is how each of these settings translate to options for requestors:

Shortest period that can be requested	Requestor options
Half Day	• Full day • Half day
2 Hours	• Full day • 6 hours • Half day • 2 hours
1 Hour	• Full day • 7 hours • 6 hours • 5 hours • Half day • 3 hours • 2 hours • 1 hour

All values currently assume and 8 hour work day and cannot set specific times to be out. This information can be added in the note.

Requesters are only able to request partial days on the first and last day of a request. If they need more consecutive days of partial days they can create multiple requests.



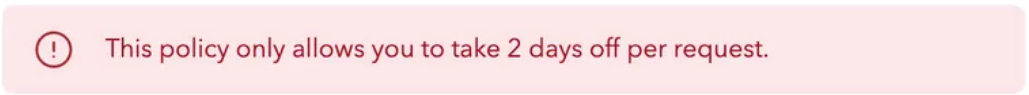
Employee's view of partial day requests

Limit number of days in a single request

Use this setting to set a maximum number of days on a given requests. You can set this limit at `0.5` day increments.

For example, if you have a sick day policy where you can't request more than 2 sick days at one time, you can use this setting to set that limit.

If an employee tries to request more than the limit, they will see this feedback on their request:



Over the limit message

Apply a policy to a subset of employees

CQL filters are dynamic, so as an employee's information changes, they will move into a different policy.

Examples:

- US Sick Time Policy applies to all employees whose home country is the United States: `address.country:"us"` Those employees will see the sick time policy on their

profile tab once active.

- Employee moves to the UK- once the change is processed and their home address country is now “GB” the following happens:
    - Admin adjust balance to reflect new policy
    - Previous time off requests will continue to be tracked against old policy

Employees without a policy that applies to them, will be displayed a default fallback message. For example, if you have people who will not be using time off in ChartHop, you can provide a link to the site where they should complete their time off requests.

To set the Default message for employees without a time off policy applying to them:

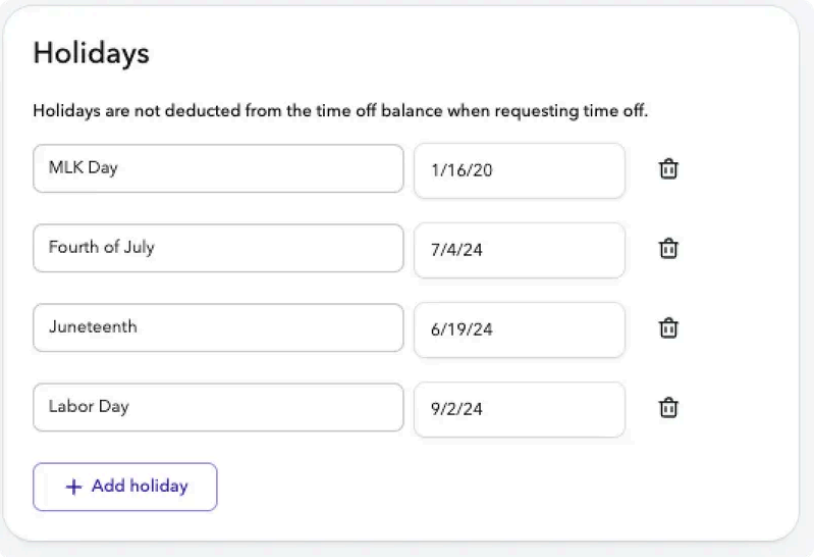
1. Go to **Admin > Modules**
2. Scroll to **HRIS > Time off**
3. Add in the **default message** you would like to display

Adding Holidays

You can specify holidays that are exempt from a policy. These days will be skipped over when detracting days taken from a balance.

We recommend you set up one holiday calendar per time off policy.

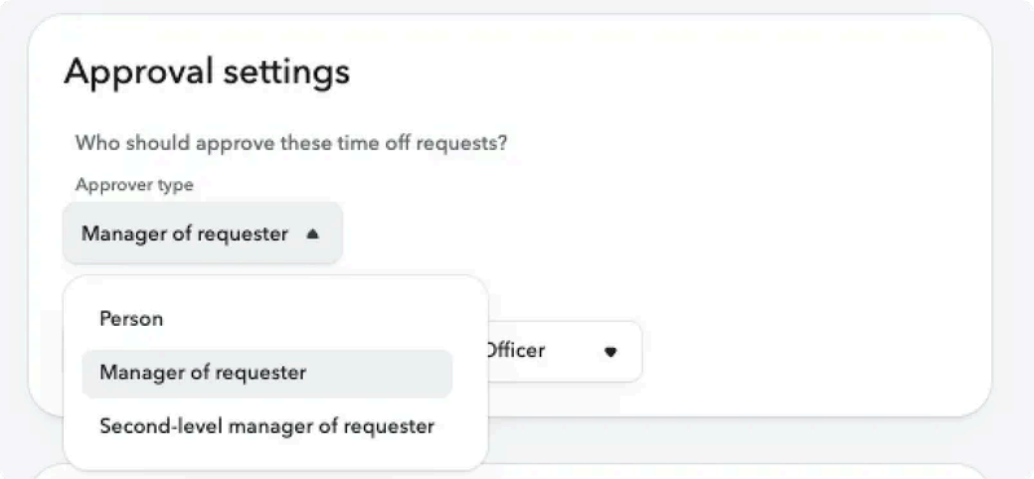
Weekend days are automatically exempt from balances.



Approvals

The approver for a policy can be the requester’s manager, grand manager, or a set person in the organization.

If a person is reporting to an open job, their manager's manager will receive the request.



Making a policy active

A policy defaults to inactive. When you are ready for employees to be able to request against their balance, you can make the policy active.

If a policy is active and is made inactive, the history of the requests made and taken will stay in the employees profile tab. Their balance will no longer display on their profile tab, and they will no longer be able to request against that policy.

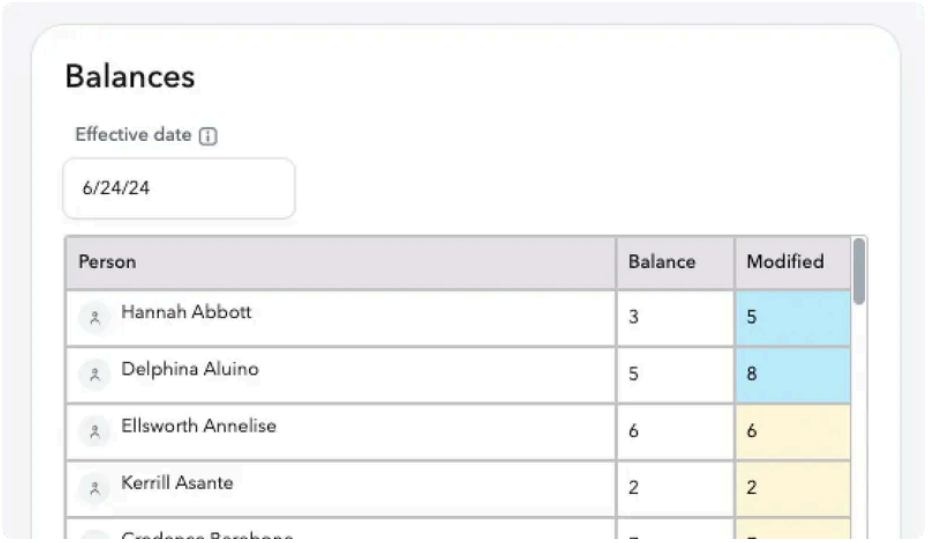
Adjusting Balances

Balances on the employees profile tab reflect days that have been requested and approved. Days that are in a pending request are not deducted from the balance.

If you transition to ChartHop for time off mid year, you can manually adjust employee balances to ensure they are requesting against the current value.

To adjust a balance, you can change the value in the “modified” column next to the employee's name in the “Balances” tab. Once a balance is edited, the cell will turn blue to indicate the value has been changed.

When a balance is changed, **any request that has been taken before the adjustment date** for the calendar year are no longer deducted from the balance. Only future requests and time off scheduled after the balance adjustment date will be deducted.


Balances
Effective date
6/24/24
Person
Balance
Modified
Hannah Abbott
3
5
Delphina Aluino
5
8
Ellsworth Annelise
6
6
Kerrill Asante
2
2

5.10.8.3. Maintaining time off

After launching your policy, use these tools to manage Time Off in ChartHop:

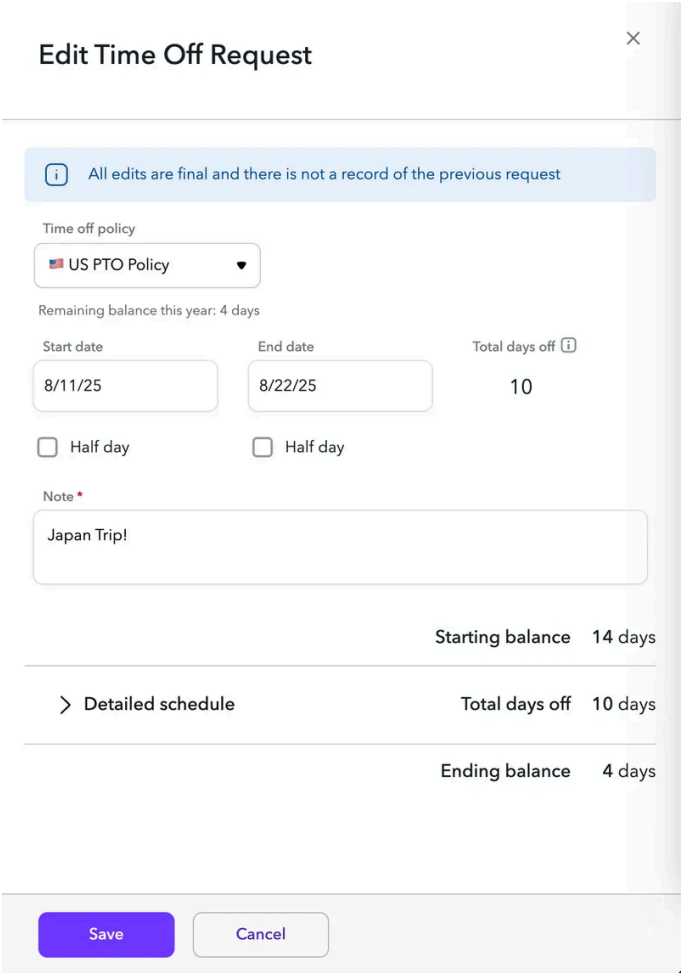
Edit a time off request

As an admin, you are able to edit time off requests for anyone in the organization.

To request time off:

1. Find the right person whose time is off. Go to their **Time off** tab.
2. Find the time off request to edit, click the check box next to it and select **Edit.**
3. Make any of the following updates:
    1. Time off policy
    2. Start Date / End Date
    3. Note
4. Click **Save** to save the update. Note that the previous request will not be saved.

Employees can also self-serve and **edit future time off requests** for themselves. Employees are not able to edit requests that have been approved, rejected or are in the past.



Delete a time off request

As an admin, you are able to delete any pending or approved time off request. Employees can also delete requests.

To delete a time off request:

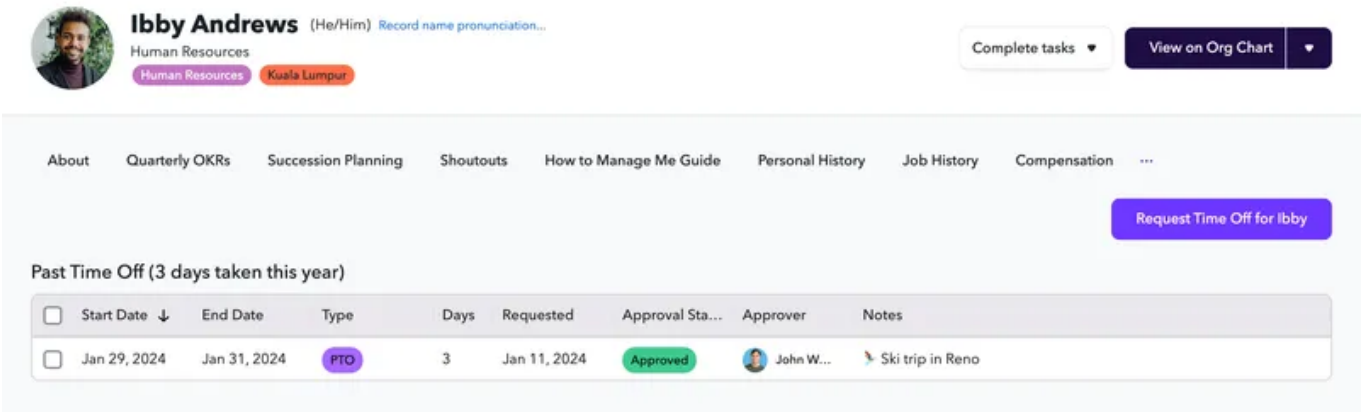
1. Go to the person's profile
2. Select the **Time off** tab
3. Select the request that you would like to delete using the checkbox on the left of the table.
4. Click **Delete** in the actions buttons at the top of the table
5. Type DELETE and confirm the deletion of the time off request.

Request time off for another person

As an admin, you are able to add time off for anyone in the organization.

To request time off:

1. From the left sidebar, select **My Profile**.
2. Go to the **Time off** tab.
3. Click **Request time off for Person's Name**
4. Complete the time off request
5. The request will be sent to your manager for approval by you and added to their time off list.

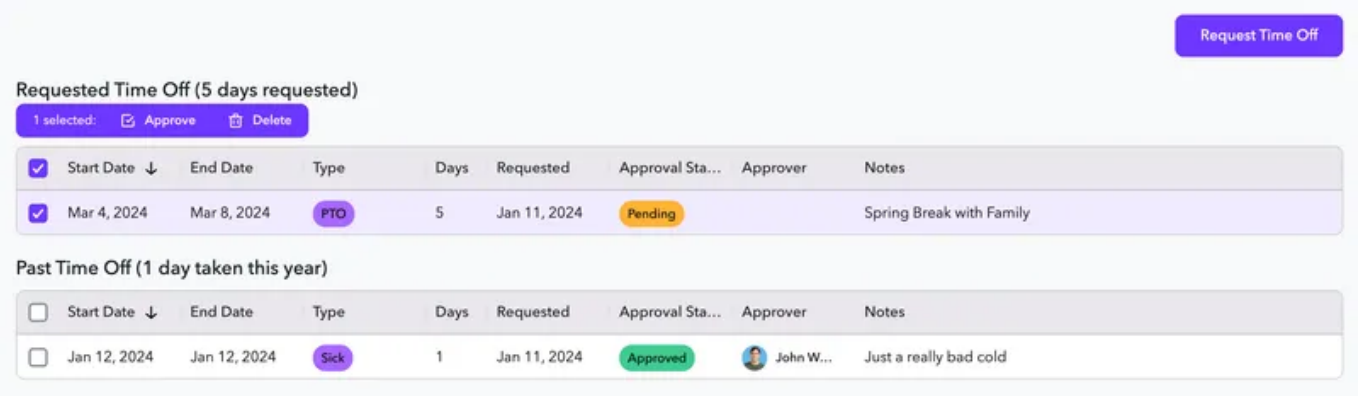


Approve or reject a time off request

As an admin, you are able to approve any pending time off approval requests regardless of who the person is.

To approve or reject a time off request:

1. Go to the person's profile
2. Navigate to the **Time off** tab
3. Select the request that you would like to approve or reject using the checkbox on the left of the table.
4. Click **Approve** in the actions buttons at the top of the table
5. Add an approval note and click **Approve** or **Reject** to submit the approval.



Reassigning an approver

If an approver is not available for a period of time, you can reassign the approver for individual requests. Navigate to the employee's profile page or **Task** page, and check the box next to the request you want to reassign.

Click "**Reassign**", and you can choose a different approver. The new approver will get an email notification and the task will display on their home page.

Visibility of time off

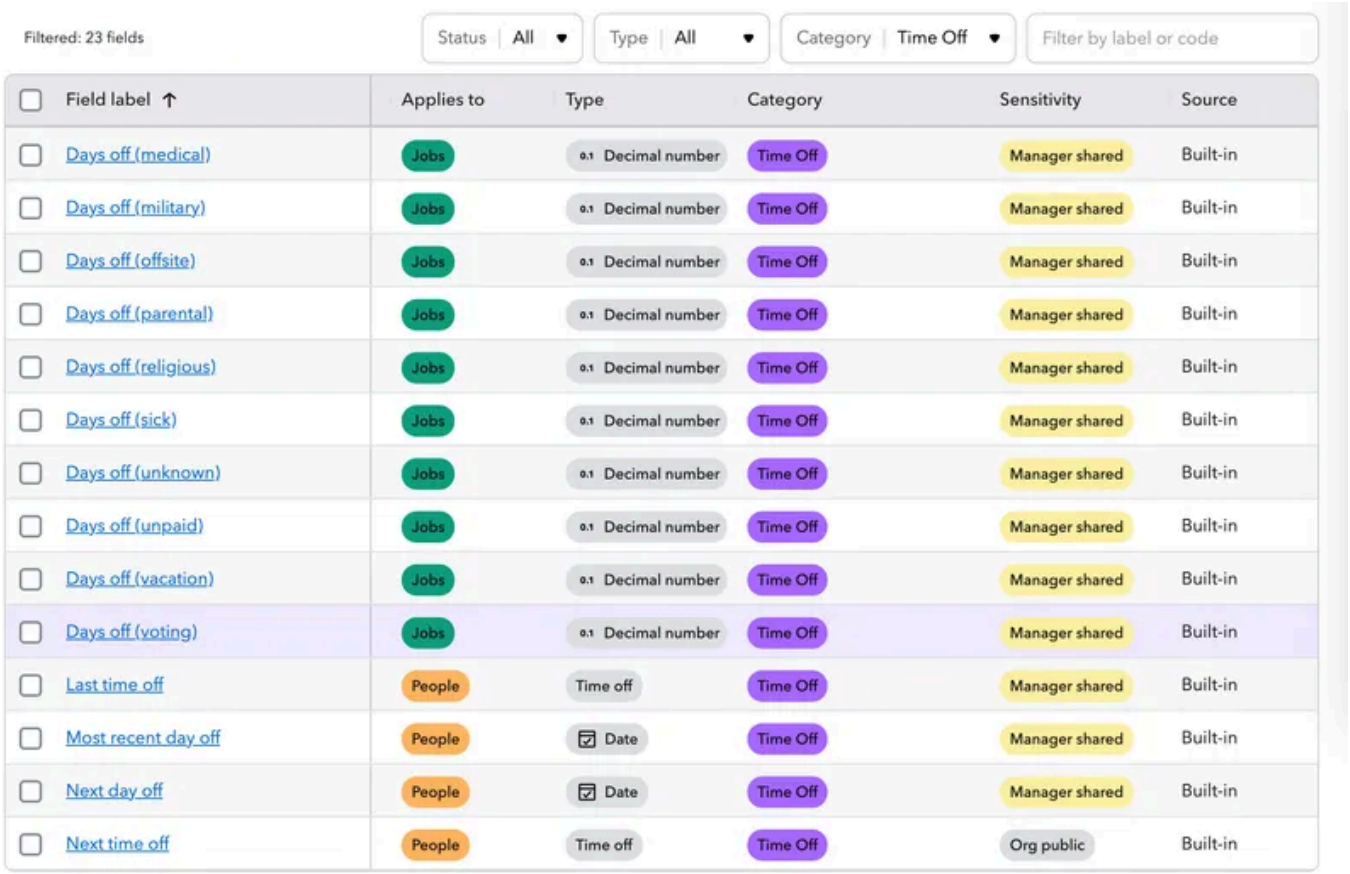
The default visibility for time off requests. is the following:

Role	View current and future time off requests	View previous time off requests	Edit time off policies
Employees	✅ For the entire organization	❌ Only for self	❌
Managers	✅ For the entire organization	✅ For people in thier reporting line	❌
Owners & People Ops Admins	✅ For the entire organization	✅ For the entire organization	✅

Customizing time off visibility

There are several ways to adjust time off visibility:

1. Adjusting the sensitivity settings for built in Time Off fields or Category. You can view Time Off fields by filtering to the Time Off Category on the **Fields Page.**
2. Use **Custom Roles** to grant permission to `timeOff` or `timeoffPolicy`.



Customizing time off visibility

5.10.8.4. Troubleshooting time off

This page details how to troublshoot and resolve common time off issues.

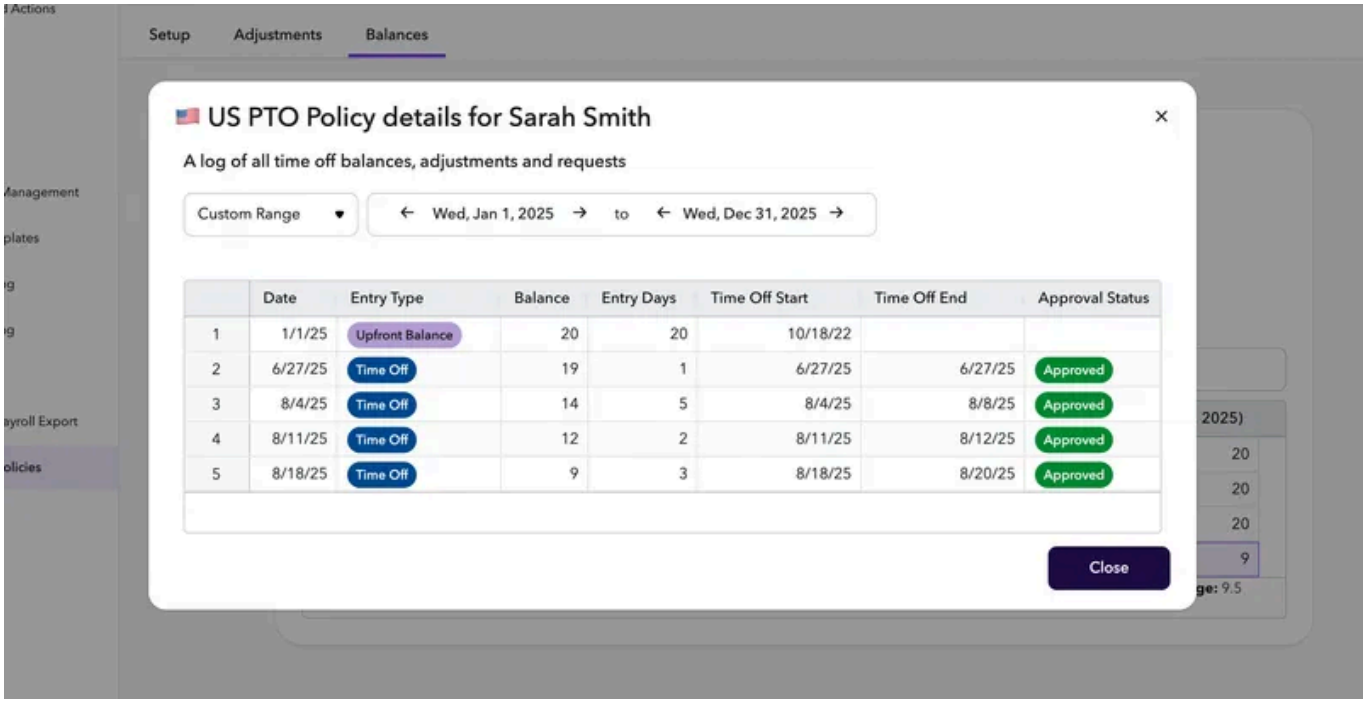
How to troubleshoot an "incorrect" balance:

If an employee says they have an incorrect time off balance, here are your tools for understanding their balance.

Identify why their balance is the way it is.

Balances are calculated based on the combinations of Upfront Balances, Accruals, Carryover, Adjustments and Approved time off requests. The best place to understand the balance is the policy details modal which can be accessed by clicking on a policy on the **profile Time off tab** or the **Balance Tab** of the policy.

This will display a ledger of all transactions in a person's time off history. You can walk through it to understand how a balance was calculated and determine potential the issues with it.

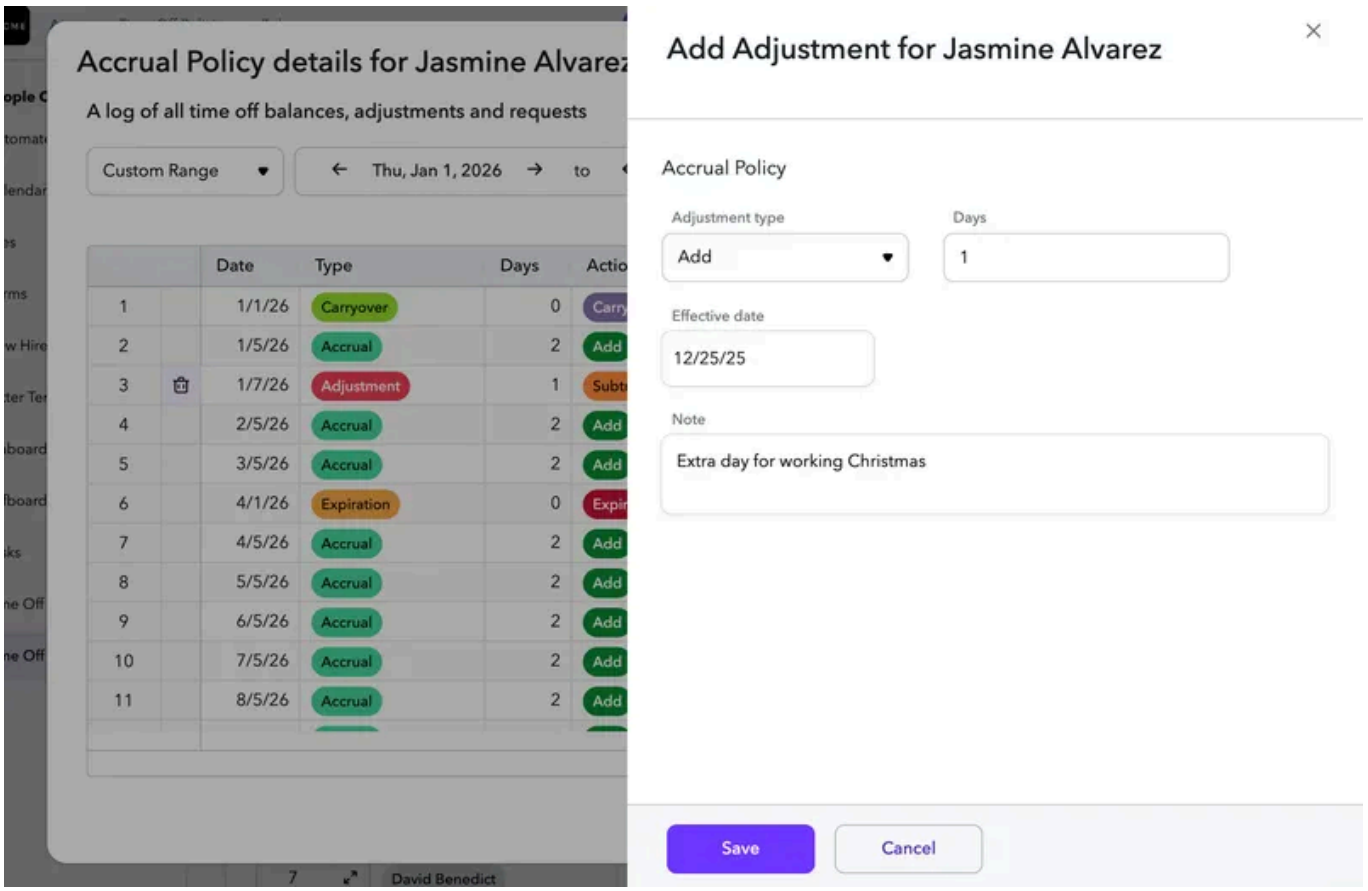


A few common issues that could be the problem:

- An **Adjustment** was added incorrectly
- A **Time Off request** is incorrect
- Time off **Expired** and the person didn't realize it

Resolving an issue with an Adjustment

Adding an adjustment



To add an adjustment:

1. Go to the **Policy details dialog** for a certain person using the Balance Tab of the policy.
2. Click **Add Adjustment**
3. Select an adjustment type:
    - **Add -** Will add additional days for the person as of the effective date
    - **Subtract -** Will add additional days for the person as of the effective date

- **Override -** Will set the balance to the indicated amount as of the effective date. *We advise you use this option sparingly. If you are using it with an arbitrary effective date, you are likely not addressing the root issue for why the balance is incorrect.*

4. Set the number of **days** to add, subtract or set as the balance
5. Set the **effective date** - *We advise that you intentionally set this date rather than just setting it to the current date. A few examples:*
    - If a person was awarded an extra day for working on December 25, and you are adding it to their record on December 29, then us Decemeber 25 as the effective date.
    - If a person's upfront balance is incorrect, and you realize this in March 13, add the override adjustment to the correct upfront balance with an effective date of January 1 rather March 13.
6. Add a note *(strongly recommened)*
    - Undocument adjustments often cause confusion. For example: "Extra day for working Christmas" or "Correcting upfront balance due to tenure issue"

Deleting an adjustment

You are able to delete adjustments that have been have made in ChartHop.

		Date	Type	Days	Action	Change	Balance	Created at	Time off star
1		1/1/26	Carryover	0	Carryover	-18.499	5	12/30/25 11:08 PM	6/20
2		1/5/26	Accrual	2	Add	2	7	12/30/25 11:08 PM	6/20
3		1/5/26	Time Off	3	Subtract	0	7	1/7/26 3:43 PM	1/5
4	🗑	1/7/26	Adjustment	1	Subtract	-1	6	1/7/26 3:32 PM	6/20
5		2/5/26	Accrual	2	Add	2	8	12/30/25 11:08 PM	6/20
6		3/5/26	Accrual	2	Add	2	10	12/30/25 11:08 PM	6/20

To delete an adjustment:

1. Go to the **Policy details dialog** for a certain person using the Balance Tab of the policy.
2. Locate the adjustment and click the trash can icon.
3. Confirm that you want to **Delete Adjustment**

Editing an adjustment

If you need to adjust the days, type, effective date, or note of an adjustment, you will need to **delete it and re-create it.**

Resolving an issue with a Request

Here are instructions for how to solve the following issues:

1. **Change a request to a different policy**
    1. Select the request and click the Edit button.
    2. In the panel, select the new policy and click Save.
2. **Change the dates of a request**
    1. Select the request and click the Edit button.
    2. In the panel, select the new dates for the request.
3. **Add a missing request**
    1. Single request - As an admin, you can click “Request Time Off” and create a new time of request for the person and create the missing request
    2. In Bulk - Contact the ChartHop team if you need to import a number of missing requests.
4. **Delete an extra request**
    1. Select the request from the list and click “Withdraw Request.” In the confirmation dialog, follow the instructions.
5. **Approve a pending request**
    1. Unapproved requests are not counted towards a balance. As an admin, you may approve or reassign approval of a given request to another person.

5.10.8.5. Time off payroll export

Overview

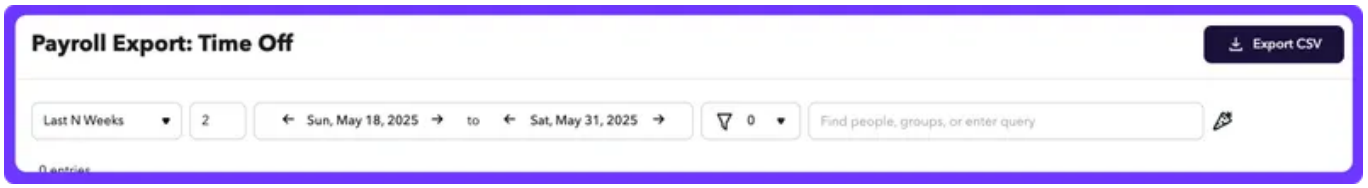
Time off data frequently needs to be recorded for payroll. Our payroll export allows you to export all time off data to appropriately report on time off taken.

To export data:

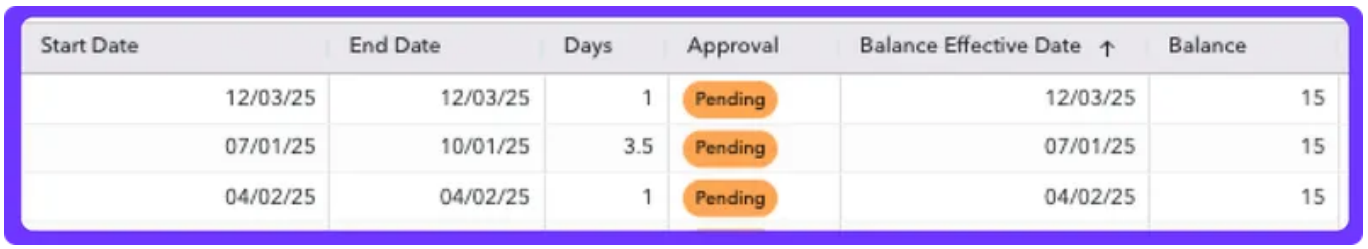
1. Go to People Ops Tools → Time off payroll export
2. Choose the time period for the data you want to see- for example, if you need to report on the last two weeks for payroll, click "Last N Weeks" and insert "2"
3. If you want to filter for certain countries, employement status, or other fields, you can use the filter bar to set that criteria
4. You will see that the payroll export defaults to the time off columns-
    1. Employee- Employee name.
    2. Policy Name
    3. Policy Type - Type of policy (PTO, Sick, etc.).
    4. Type of time off - Policy Type.
    5. Entry Type- **Time off** is a time off request, **Upfront Balance** is a balance adjustment
    6. Start Date - Start date of request. This will only be populated for time off requests, not balance adjustments.
    7. End Date - End date of request. This will only be populated for time off requests, not balance adjustments.
    8. Days - Number of days requested or the number of days updated in the balance.
    9. Approval - Whether the request has been approved, rejected, or is pending.
    10. Note - Any notes on the time off request.
    11. Balance Effective Date - The date at which the balance is effective. For example, Start date of a request is 1/7/25 - 1/10/25. As of 1/7/25, the balance was 15 days. *(See example below)*

12. Balance - The balance as of the balance effective date.
13. "+"- This allows you to add any additional columns you may need. You can adjust this like the datasheet- adding columns and moving them to the best order for your export.

5. Once you have the data you need, click "Export CSV" to export your time off data



Select the time frame desired

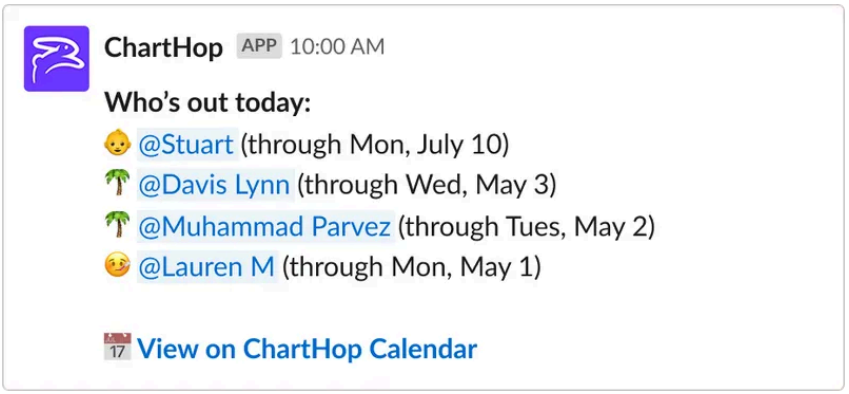


Start Date	End Date	Days	Approval	Balance Effective Date	Balance
12/03/25	12/03/25	1	Pending	12/03/25	15
07/01/25	10/01/25	3.5	Pending	07/01/25	15
04/02/25	04/02/25	1	Pending	04/02/25	15

Balance effective date example

5.10.8.6. Time off notifications

Sending time off notifications to Slack



Example message of who's out

You can set up notifications to send to Slack or email summarizing who is out on any given day. To set up the notifications, use **intall the bundle** with the action into your ChartHop account.

To configure the notifications:

1. **Intall the bundle**
2. Add the name of the channel that you would like the messages to send to to the first action step or select a different message recipient. By default, it will send to #general.
3. Make any modifications to the message:
    1. If you would like to only send messages for a specific department or team, you can add in a filter into the first line of the action. For example: `{% assign outToday=db.job.find{nextDayOff <= today and department=["people","talent"] } %}`
    2. If you would like to change the emojis for each time off type or adapt any of the text you may do so there.
    3. If you would like to add any additional info from the time off request, you may do so using the **TimeOff** object. For example: `{{job.nextTimeOff.startDate}}`

5.10.8.7. Time off admin FAQs

Employee Balances and policies

An employee changed locations and changed time off policies. How is that handled?

Time off policies adjust automatically. When an employee changes locations and therefore changes policies, they will automatically be moved to the new policy. Their **STARTING** balance will adjust to the new policy, therefore the current balance will be different. Admin will need to manually adjust if any change is needed otherwise.

Can I move their requests over?

Yes! If you'd like, you can export their requests from the payroll export, and upload them in admin → import data into their new time off policy. If you are doing this, you would just adjust their starting balance or accrual rate, and the policy will re-adjust on its own.

Tip: You can set up actions to send a notification to administrators when an employee meets critiera to move to a new policy! See the workflows below.

An employee didn't end up taking the time they had requested. Can I change it?

Yes! If the date has passed and the request was approved, Owners and People Ops Admin roles can **withdraw** the request.

I need to adjust an employees balance.

Go to the time off policy → adjustments, set the desired date and make the adjustment in the **MIDDLE** column.

NOTE: An adjustment sets the balance as of that date. All approved time off requests from before that date will not be considered in the balance anymore, only future requests.

Different policy setups

Time Off In Lieu (TOIL) or earned/event-driven policies

These policies start at a zero balance and days are awarded only when a specific action occurs. Such as working overtime, working on a holiday or making a weekend push to finish a big project.

Days are usually added at the discretion of HR or management and usually defined in a handbook or on the policy.

To create this policy:

1. Set the policy type to **In Lieu.** (this is organizational only)
2. Set **How much time should employees get per year?** to `0`.
3. Add any additional policy settings such as who it applies to, expiration, maximum days and descriptions. Adding a employee-facing description can help clarify any rules around the policy.
4. Make the policy **Active**.

To award days to a person:

1. As an admin, navigate to policy details modal for that person and click **Add Adjustment**.
2. Add an adjustment for the number of **days** with an **effective date** of the day that the time is being awardeded for. If you need to award a partial day, you can use decimals such as `0.5` days.
3. The employee can now request from this policy

Failed to verify your browser

Code 11

Vercel Security Checkpoint | iad1::1781192179-5MY5cZXBylGXBgHTzOmQNjXngTE3gIap

Tenure based policies

Employees can earn more days of PTO as their tenure in the company increases.

Example 1: Under 5 years tenure starts with 20 days, but between 5-10 years tenure they start with 25 days. This is awarded on the date of their anniversary. On their 6th year, they will start with that amount at the start of the policy year.

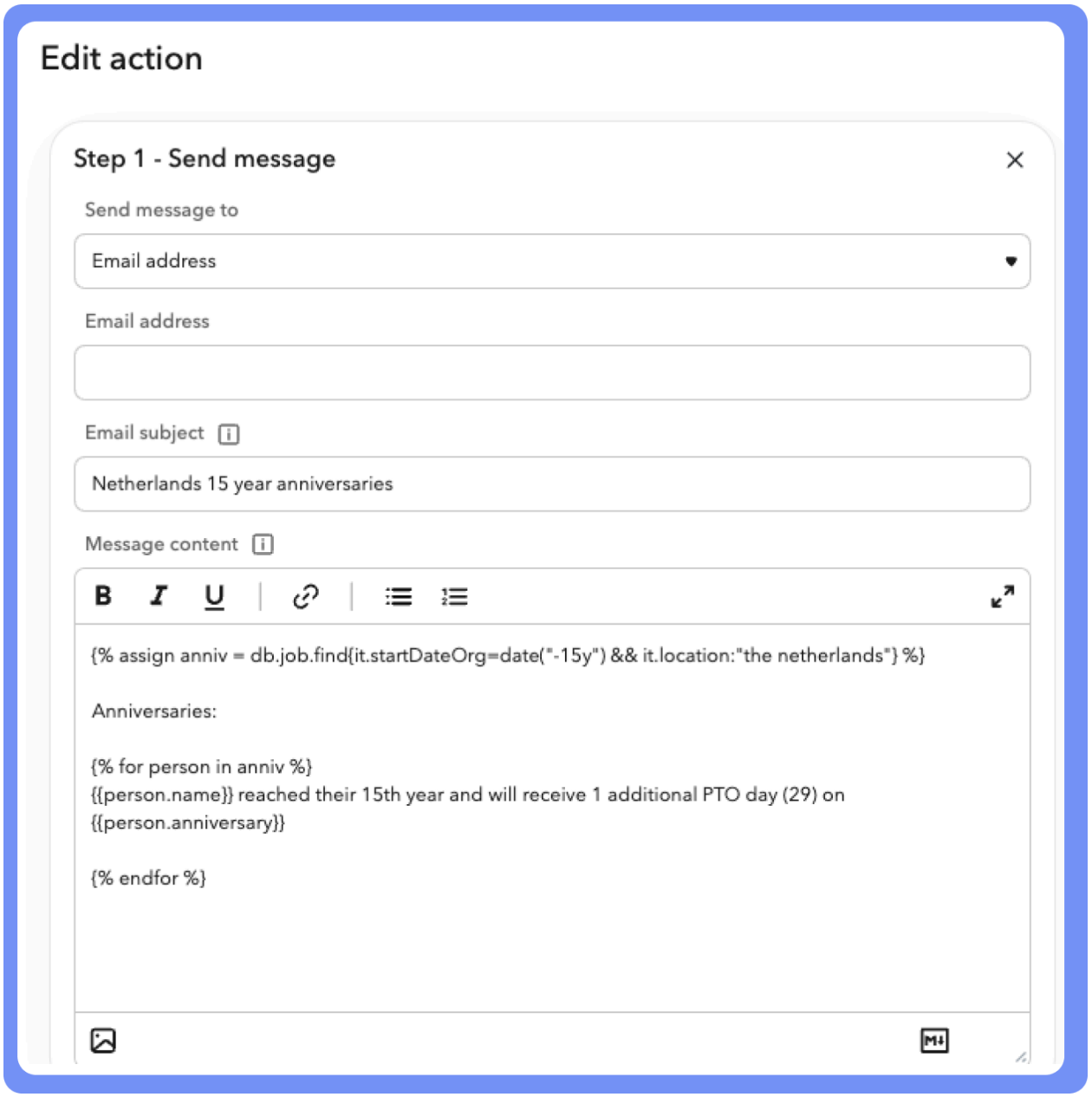
Example 1 setup:

Create one policy that applies to all of these employees. Then create actions that will do the following:

- Every day, look for employees who's start date was 5 years ago, and who meet the time off policy filter



- Send a message to a person or to an email address



Message to paste:

```
{% assign anniv = db.job.find{it.startDateOrg=date("-15y") && it.location:"the netherlands"} %}

Anniversaries:

{% for person in anniv %}
{{person.name}} reached their 15th year and will receive 1 additional PTO day (29) on {{person.anniversary}}

{% endfor %}
```

This message will display:

Anniversaries:

John Smith reached their 15th year and will recieve 1 additional PTO day (29) on 9/30/35.

Albert Rodriguez reached their 15th year and will recieve 1 additional PTO day (29) on 9/30/35.

Action recipient takes:

Recipient needs to allocate the additional days to that employees balance. They can prorate it or give the full amount. See "I need to adjust an employees balance" above.

Example 2: Under 5 years tenure starts with 20 days, but between 5-10 years tenure they start with 25 days. This is awarded at the START of their 5th year. They then will start with this balance again on their 6th year, etc.

To set this up, put all employees in the same policy, and manually adjust their starting year balance accordingly. You can leverage the data sheet to give a list of employees that would apply.

5.11. Access

5.11.1. User access controls

ChartHop provides two paradigms for Administrators to control what users can see and do within ChartHop:

1. **Role-based Access** controls what a particular user can see and do *in general* in a given org. Role-based access is “**top-down”**, tied to a user and configured by administrators.
    1. *E.g. “Owner” access role vs. “Employee” access role*
2. **Sharing Access** controls which users can see and manage *a particular* entity instance. Sharing access is **“bottoms-up”**, tied to a particular thing and configured by the user who created it.
    1. *E.g. Sharing a scenario with someone, granting them "Editor" access, vs "Viewer" access to that particular scenario*

These two frameworks provide administrators with powerful and granular control over what users can see and do within their ChartHop org.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.11.1.1. Key Concepts: Role-based Access

ChartHop's Role-based Access Controls enable you to define ***who*** (the user) can do ***what*** (the action) for ***which*** part of the platform (the entity).

- For example, you might say that the **CEO** (the user) is allowed to **read** (the action) the data for all **employees** (the entity) in the system.
- Or you might say the **Head of Recruiting** (the user) is allowed to **create** (the action) **new hires** (the entity) in the system.

To do this, users are assigned a specific role, and those roles contain an explicit set of permissions, which define what that role has access to see and do.

Permissions and Roles

Permissions enable you to either **Allow** or **Deny** access to a specific entity, data point, page, or process inside Charthop. You can read more about Permissions in **Defining a custom permission**.

Roles are a collection of Permissions that dictate what a user can and can not see or do inside Charthop. You can read more about Roles in **Defining a custom role**.

> **An analogy to help you visualize**
>
> You can think of Permissions as keys that unlock areas of the ChartHop platform. You can think of a Role as the keychain that holds the keys. A Role (keychain) holds many Permissions (keys) that grant or deny access to parts of ChartHop.

Deny always beats Allow

If a role contains two conflicting permissions, the DENY permission will always win.

For a very simple example, consider a role with the following two permissions:

```
ALLOW person:read
DENY person:read
```

A user with this role would *not* have access to see any Person data, because the DENY permission "beats" the ALLOW permission.

Let's consider a more nuanced example, such as a role with the following two permissions:

```
ALLOW job:read
DENY job:read fields:["baseComp"]
```

In this example, the ALLOW gives the user access to see – read – all fields on job. But the DENY means that this user is *not* allowed to see – read – the field baseComp on jobs. Even though the ALLOW permission technically gives the user access to read *all* job fields, the DENY in this case wins, so this user can see *all* job fields *except* base compensation.

> **Modules:** HRIS | **Engagement | Goals | Performance |** Compensation Reviews | **Headcount Planning**

5.11.1.2. Defining a custom permission

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

There are five elements that define a permission:

Permission Label

This is the name of the permission, and it's what you will see when selecting permissions in the **Roles** screen.

> **We recommend** using a naming convention that starts with either **Allow** or **Deny** in accordance with what the permission is accomplishing. For example a permission that allows a person to see the **Groups** page in Charthop might be labeled "Allow Read Groups".

Permission Description

This is a full description of what the permission accomplishes.

> **We recommend** being as descriptive as possible, since this will help your team keep a better record of what each permission does, and helps ensure that any ChartHop administrators will give proper custom access to the often-sensitive data stored in ChartHop. Without detailed descriptions, mistakes can happen.

Allow/Deny Toggle

This allows you to toggle whether the specific permission is to **Allow** or **Deny** access to data, pages, or actions in question.

☝**Please note** that you cannot combine both Allow and Deny into one permission using the Permissions interface. If you have a need to have both, you should instead create two separate permissions on the same role, or you can use the Advanced Editor.

Entity and Action Drop-downs

There are two menus present in a permission that are linked together. These choices are known as the permission's **entity action pair.** Together, these define *what* the user is allowed to do (the action) on *which* part of the platform (the entity).

First select the **Entity,** or part of the platform you want to grant or deny access to. Then select the **Action,** or *what* behavior you want to allow or deny for the given entity.

☝**Please note** that the Action menu will change depending on the Entity so please select an Entity first.

Common Actions

There are 4 basic Actions that are present on most Entities:

- **Create:** Create controls the ability to **create** instances of the Entity.
    - For example, for an ALLOW permission, if you select the entity *Group* and the action *Create,* then the permission would grant the ability to create new Groups – new Departments, Teams and Locations.
- **Read:** Read controls the ability to **see** that specific Entity.
    - For example, for an ALLOW permission, if you select the entity *App* and the action *Read,* then the permission would grant the ability to see the list of Apps that are available to be installed.
- **Update:** Update controls the ability to **edit** an already existing Entity instance.
    - For example, for an ALLOW permission, if you select the entity *Person* and the action *Update*, then the permission would grant the ability to edit or update the details of a Person that is already created, such as updating someone's legal name or work email.
- **Delete:** Delete controls the ability to **delete** a specific instance of an Entity.

- For example, for an ALLOW permission, if you select the entity *Comp Band* and the action *Delete*, then the permission would grant the ability to delete a Comp Band that is already created, like deleting an outdated band.

Optional Restrictions

When defining a permission, you might want to restrict the scope of access. We offer you three ways to restrict a permission's scope:

1. Field and Category restrictions
2. Directions restrictions
3. Carrot (CQL) filters

We'll dive into how to use each restriction type.

Field and Category Restrictions

Field and Category restrictions limit the permission to apply only to the specified Fields or Categories. Field and Category restrictions can be used on Person, Job, Business Unit, and Comp Band entities.

Some examples:

- `ALLOW job:read fields:["baseComp"]` grants the ability to see the "baseComp" field for all jobs in the system, but not other job fields.
- `ALLOW job:read categories:["performance"]` grants the ability to see all the fields in the "performance" category for all jobs in the system, but not other job fields.
- `DENY person:read fields:["birthDate"]` denies the ability to see the "birthDate" field for all people in the system.

Keep in mind that every field in Charthop applies to a particular entity, either Person, Job, Business Unit, or Comp Band. Depending on the specific field you would like to allow or deny access to, you will need to check the "Applies to" option for that field on the Fields list page, and select the appropriate entity when configuring your permission.

Directions Restrictions

Directions filters enable you to limit the permission according to the person's position in the org chart. Direction filters can only be used with Job and Person entities.

There are four available directions:

1. **Self:** limits the permission to apply to the user's own person or job
2. **Under:** limits the permission to apply to those "below" the user in the org tree. Think the person's direct reports, grand reports, all the way down the tree.
3. **Over:** limits the permission to apply to those "over" the user in the org tree. Think the user's manager, grand-manager, all the way up the tree.
4. **Peer:** limits the permission to apply to jobs outside of the person's reporting line.

Some examples:

- `ALLOW job:read directions:["under, self"]` grants the ability to see all the fields for the user's own job and any jobs that report up into them.
- `DENY person:read fields:["baseComp"] directions:["over"]` denies the ability to see the "baseComp" field for anyone over the user in the management chain (their manager, their manager's manager, etc.)

Carrot Filters

In the event that you need to filter your permission by even more complex logic, you can use the generic Carrot (CQL) filter. Using a Carrot filter on your permission will apply the permission *only* to Jobs and People matching that filter string.

Some examples:

- `ALLOW job:read filter:"job.department=me.department"` grants the ability to see all the fields for any jobs whose department matches the user's department. *(e.g. if the VP of Engineering had this permission, she could see the job details of all jobs in the Engineering department.)*
- `ALLOW person:read fields:["address"] filter:"job.location='remote'"` grants the ability to see address fields for any job with a "remote" location.

To learn more about how to use query expressions, check out our **Carrot Docs**.

5.11.1.3. Defining a custom role

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

When creating a role there are 3 main elements.

Role Label

The user-facing name of the role. You will see the role's label when applying it to a user, so be clear and accurate.

Description

A detailed description of what the role permits. This description will appear on the role selection screen when changing a user's role, so we recommend being as descriptive as possible in order to prevent accidentally giving a permission to a user they should not have.

Permissions

This is a search field that will allow you to search for your custom made permissions or a pre-built permission. There is no limit to the number of permissions that you can assign to a role. The permission **General Allowed** is the permission for standard Employee Access, and we recommend starting roles with this permission and building up Allow permissions to open access for the role.

> ☝**Please note** that a Deny permission will always override an Allow permission. Read more about how Deny permissions always beat Allow permissions here.

5.11.1.4. Built-in Roles

A user’s access role within ChartHop determines what data they can see within the org and what actions they can take within ChartHop. Access roles are the broadest way to grant employees access to ChartHop.

For example, users with the Owner role can create new surveys, while users with the Employee role can only take surveys and cannot create them. Users in your organization with the Recruiter editor role can create new jobs in ChartHop.

Each role includes the permission of *standard access,* which means access to the non-administrative features of ChartHop, including shared Scenarios for review purposes. Administrative tasks, such as creating new surveys or importing employee data, are restricted to those with advanced access, such as an Org editor, Owner, or Technical owner role.

Assigning access roles to the members of your organization should be a thoughtful process and follow the principle of granting users only the permissions they need and no more than that. For several roles within your organization, including members of HR, recruiting, finance, IT, and more, additional access may be appropriate, depending on your organization's needs.

For roles with access to sensitive data such as personal information for employees, you can further filter what data those that role can see. For example, you can assign the **Org editor** role to multiple people in your organization but filter each person to have those permissions only in their department or division.

> ChartHop Basic provides two access roles to assign to employees in your organization: Owner and Employee. Non-employees cannot be allowed access.

The following table gives a general overview of each role. Select the role name to view more specific details on pages and data that the role can access.

Role	Description
Employee	Allowed to see their own personal information and the compensation data of anyone in their reporting line. This is the default access level appropriate for most organization members.
Cash compensation viewer	The same access as an employee but can see cash compensation data, including cash compensation for individuals outside their reporting line.
Compensation viewer	Same as an employee but can see all compensation data, including both cash and equity.
Employee (no comp data)	The same access as an employee but without permission to view compensation data for those in their reporting line.
Equity compensation viewer	The same access as an employee but can see all equity compensation data, including equity compensation for individuals outside their reporting line.
Guest	Can view org public data. Recommended for users outside the organization. Users who are org members can also see their own personal data but not the sensitive data of individuals in their reporting line.
Org editor	Access to all sensitive data, including compensation, with the ability to edit and make permanent changes to the primary environment. Does not have admin capabilities such as the ability to install applications or change organization-wide settings.
Owner	Allowed full, unrestricted access to **everything**, including inviting new users and assigning roles. Can configure integrations and manage organization-wide

Role	Description
	settings. Because of the unrestricted nature of this role, **this access role should be used very sparingly.**
People Ops Admin	Access to all sensitive data including compensation, with the ability to edit and make permanent changes to the primary environment. Has the ability to configure and manage Fields, Forms, Categories, Profile Tabs, and Actions, among others. Does not have the ability to change user permissions, configure integrations, or alter organization-wide settings. For most organizations, this role should be the most commonly-used administrator role.
People Ops Admin (no comp data)	Same as People Ops Admin, but without access to compensation data. Access to all sensitive data, except for compensation-related data. Has the ability to edit and make permanent changes to the primary environment, and has the ability to configure and manage Fields, Forms, Categories, Profile Tabs, and Actions, among others. Does not have the ability to change user permissions, configure integrations, or alter organization-wide settings.
People Ops Admin (no sensitive data)	Same as People Ops Admin, but without access to sensitive data. Access to manage configuration and workflows, without direct access to any sensitive data including compensation. Has the ability to configure and manage Fields, Forms, Categories, Profile Tabs, and Actions, among others. Does not have the ability to change user permissions, configure integrations, or alter organization-wide settings.
Recruiter	Same as an employee and can view open jobs and the sensitive data associated with those jobs, including target compensation. Cannot merge scenarios but can create view scenarios shared with them.
Recruiting editor	Same as employee but can create open jobs in the primary timeline as well as in scenarios. Allowed to view and edit sensitive information about open jobs, including target compensation levels and other sensitive data.
Sensitive data (limite	Same as an employee but can also see all sensitive data except compensation for those outside their reporting line.

Role	Description
d comp)	
Sensitive data viewer	Same as an employee but can also see all sensitive data, including for those outside of their reporting line.
Technical owner	Allowed to create and invite new users as well as assign user roles. Can configure apps and integrations, update custom fields, and alter organization-wide settings. However, they do not receive direct access to sensitive people data in the application. Because of the ability to configure data access and API keys, a Technical Owner could indirectly establish access to sensitive data (although such activity would be auditable). This role should be granted with care to the appropriate IT staff.

The following roles are deprecated:

- Time Off Viewer
- Personal Contact Viewer

Access remains unchanged for users who have already been assigned these roles. You cannot assign new users these roles.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.11.1.4.1. Cash compensation viewer

The Cash compensation viewer role is given to employees who have a role in determining and analyzing cash budget information. Employees with this role can access all cash compensation data. They **cannot** access equity compensation.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Viewing ChartHop to understand the organization.
- Completing employee tasks assigned to them (1:1s, surveys), participating in compensation reviews or scenarios when invited.
- Reviewing cash compensation to make budget decisions.

Common organization titles for users who need the Cash compensation viewer access role:

- FP&A (Financial Planning and Analysis) manager
- Finance analyst

The table below lists how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

- Can view their own compensation data and personal data.
- Can view compensation data for those in their reporting line (including cash and equity).
- Can view all **cash** compensation data for the organization.

Employee pages

ChartHop page	Capabilities
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views. • Can view and edit all **cash** compensation data. • Can share views.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can view all cash compensation data and changes to that data.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view all compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile such as 1:1 forms.
History	• Can view, filter and export historical data.
Compensation reviews	• Can be assigned to be an approver or reviewer of a compensation review.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.2. Compensation viewer

The Compensation viewer role is given to employees who have a role in determining and analyzing budgets. Employees with this role can access all compensation data, including cash and equity compensation.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Viewing ChartHop to understand the organization.
- Completing employee tasks assigned to them (1:1s, surveys) and participating in compensation reviews or scenarios when invited.
- Reviewing compensation to make budget decisions.

Common organization titles for users who need the Compensation viewer access role:

- FP&A (Financial Planning and Analysis) manager
- Finance analyst

The table below lists how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

- Can view their own compensation data and personal data.
- Can view compensation data for those in their reporting line.
- Can view all compensation data, both cash, and equity.

Employee pages

ChartHop page	Capabilties
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views. • Can edit any compensation data. • Can share views.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can view all compensation data and changes to that data.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for all org members. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data. • Cannot make any changes.
Compensation reviews	• Can create compensation reviews. • Can be assigned to be an approver or reviewer of a compensation review.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.3. Employee

The Employee role is given to most employees, including managers. Employees with this role can access the main pages of ChartHop, including planning scenarios and dashboards.

No sensitive data access is also granted with this role, except for being able to edit their own personal data and view the compensation of their direct reports.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

Typical ChartHop responsibilities for someone with this role:

- Viewing ChartHop to understand the organization.
- Completing employee tasks assigned to them (1:1s, surveys) and participating in compensation reviews or scenarios when invited.

Common organization titles for users who need the Employee access role:

- All individual contributors and managers.

The table below lists how users with this role can use the respective pages. If a page is not listed, users with this role cannot access that page.

Sensitive data

- Can view their own compensation data and personal data.
- Can view compensation data for those in their reporting line.

ChartHop employee pages

ChartHop page	Capabilities
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views. • Cannot edit any data other than their own personal information. • Can share views.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data. • Cannot make any changes.
Comp Reviews	• Can view and approve a comp review that they have been assigned.

5.11.1.4.4. Employee (no comp data)

The Employee role (no comp data) can be used if you want to restrict access to the compensation data of those within an employee's reporting line. Employees with this role can access the main pages of ChartHop including planning scenarios and dashboards. A person with this role **cannot** see the compensation data for their direct reports.

This role also has standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Viewing ChartHop to understand the organization.
- Completing employee tasks assigned to them (1:1s, surveys) and participating in compensation reviews or scenarios when invited.

Common organization titles for users who need the Employee (no comp data) access role:

- All individual contributors and managers.

The table(s) below list how users with this role can use the respective pages. If a page is not listed, users with this role cannot access that page.

Sensitive data

- Can view their own compensation data and personal data.

ChartHop employee pages

ChartHop page	Capabilities
Sensitive data access	• Can view their own compensation data and personal data.
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views. • Cannot edit any data other than their own personal information. • Can share views.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data. • Cannot make any changes.
Comp Reviews	• Can view and approve a comp review that they have been assigned, including compensation values within the comp review.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.5. Equity compensation viewer

The Equity compensation viewer role is given to employees who have a role in determining and analyzing equity budget information. Employees with this role can access all equity compensation data. They cannot access cash compensation data.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Viewing ChartHop to understand the organization.
- Completing employee tasks assigned to them (1:1s, surveys), and participating in compensation reviews or scenarios when invited.
- Reviewing equity compensation to make budget decisions.

Common organization titles for users who need the Equity compensation viewer access role:

- FP&A (Financial Planning and Analysis) manager
- Stock administrator

The table below lists how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

- Can view their own compensation data and personal data.
- Can view compensation data for those in their reporting line (including cash and equity).
- Can view all **equity** compensation data for the organization.

Employee pages

ChartHop page	Capabilities
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views. • Can view and edit all **equity** compensation data. • Can share views.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can view all cash compensation data and changes to that data.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view all compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile such as 1:1 forms.
History	• Can view, filter and export historical data.
Compensation reviews	• Can be assigned to be an approver or reviewer of a compensation review.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.6. Guest

The Guest role is given to people outside of your organization who have a need to view your org chart or other non-sensitive data.

No sensitive data access is also granted with this role. Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

Typical ChartHop responsibilities for someone with this role:

- Viewing ChartHop to understand the organization.

Common organization titles for users who need the Guest access role:

- Contractors
- Investors

The table below lists how users with this role can use the respective pages. If a page is not listed, users with this role cannot access that page.

Sensitive data

- No sensitive data access is given.

ChartHop employee pages

ChartHop page	Capabilities
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views. • Cannot edit any data other than their own personal information. • Can share views.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data.
Comp Reviews	• Can view and approve a comp review that they have been assigned.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.7. Org editor

The Org editor role should be given to employees in your organization responsible for making organizational updates such as adding or terminating employees, making compensation changes, updating personal information for employees, and organizing your employees by department, compensation band, or other groups.

One with the Org editor role can perform job and people actions on general pages such as the Org Chart, Data Sheet, and Employee Profile pages. The Org editor also has access to the following data-related administration pages: Groups, Compensation Bands, Import Spreadsheet data, and Sync history.

Sensitive data access is also granted with this role. Those with the Org editor role have access to all sensitive data.

Grant the Org editor role to those in your organization that you want to have permission to edit employee data but are not responsible for larger people operations tasks such as starting a company compensation or performance review.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Managing headcount plans and jobs, including merging scenario proposals into your primary org data

- Employee data management
- Creating and sharing dashboards

Common organization titles for users who need the Org editor access role:

- C-suite
- Chief Finance Officer
- VP of HR

The tables below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

ChartHop feature	Capabilities
Sensitive data access	• Can view their own compensation data and personal data. • Can view all compensation data, personal information, and all other sensitive data.
View as	• Can view ChartHop as another user to verify what they can view and access.

Employee pages

ChartHop feature	Capabilities
Org Chart	• Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data in employee profile pages, including compensation.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data, including compensation.
Map	• Can edit their own location and the location data of others.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can merge a scenario to the primary org. • Can see all sensitive data changes, including job changes and compensation.
Employee profiles	• View other's public information. • Edit their own information. • Can edit others’ information, including job history.
Comp reviews	• Can create compensation reviews. • Can be assigned to be an approver or reviewer of a compensation review.
History	• Can view, filter and export historical data.

ChartHop feature	Capabilities
	• Can make changes to job history, including deleting previous changes
Files & Signatures	• Can view and edit the name and access of files • Can sent and cancel requests for signatures

Administration pages

ChartHop Page	Available actions
Groups	• Can create new groups, departments, and teams and place employees in those groups.
Compensation bands	• Can import and update compensation bands for the organization.
Import spreadsheet data	• Can import employee data by using a spreadsheet. Spreadsheet imports can include adding new employees, changing information for existing employees, adding open jobs, organizational history info, and financial information such as equity and compensation changes.
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization's applicant tracking system (ATS). • Can rerun data syncs.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.8. Owner

The Owner role is the broadest access role that can be granted. Those with the Owner role have no limitations to what they can do in ChartHop and has access to ALL sensitive data.

Those with the Owner role can edit all employee data in ChartHop and access ALL ChartHop administration pages, which allows them to configure integrations, create new fields and forms, and start Compensation or Performance reviews.

Someone with this role can also configure integrations with ChartHop, such as a payroll app or Slack. Owners are also allowed to install ChartHop bundles which can contain forms, fields, and dashboards. Users with this role can grant others access to ChartHop.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Granting access roles to other employees.
- Inviting employees to use ChartHop.
- Managing headcount plans and jobs, including merging scenarios into your primary org data.
- Configuring ChartHop for your organization, including installing integrations.
- Creating compensation and performance reviews.
- Creating employee surveys (new fields and forms)

- Employee data management,
- Creating and sharing dashboards.

Common organization titles for users who need the Owner access role:

- HR Business Partner
- VP/Head or Director of People
- People Operations
- Head of M&A
- VP/Head/Director of Talent

The tables below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

ChartHop feature	Capabilities
Sensitive data access	• Can view their own compensation data and personal data. • Can view all compensation data, personal information, and all other sensitive data.
View as	• Can view ChartHop as another user to verify what they can view and access.

Employee pages

ChartHop page	Capabilities
Org Chart	• Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data including compensation.
Map	• Can edit their own location. • Can edit the location data of others.
Home Page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can merge a scenario to the primary org.
Employee profiles	• View and others' public and private information, including compensation. • Set what information of theirs that others can see. • Can view all forms that are part of the profile such as 1:1 forms.
Compensation reviews	• Can create compensation reviews. • Can be assigned to be an approver or reviewer of a compensation review.
Reviews	• Can create, edit, and monitor reviews.

Administration pages

ChartHop page	Capabilities
Groups	• Can create new groups, departments, and teams and place employees in those groups.
Users	• Can manage user access for ChartHop, including inviting employees, assigning roles, and creating new users.
Import spreadsheet data	• Can import employee data by using a spreadsheet. Spreadsheet imports can include adding new employees, changing information for existing employees, adding open jobs, organizational history info, and financial information such as equity and compensation changes.
Org settings	• Can configure organization-wide settings such as currency, home page customizations, logo, and so on.
Fields	• Can create new custom fields and edit custom fields.
Categories	• Can create and edit field categories.
Forms	• Can create, edit and configure settings for forms.
Tasks	• Can delete and send reminders for tasks
Profile tabs	• Can customize employee profile tabs.
Apps	• Can install app integrations and pre-configured bundles of fields and forms.
Billing	• Can manage payment for the ChartHop subscription.
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization’s applicant tracking system (ATS). • Can manage app settings.
Actions	• Can customize ChartHop actions that trigger events such as sending reminders.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.11.1.4.9. People Ops Admin

The People Ops Admin role should be given to employees in your organization responsible for making organizational updates such as adding or terminating employees, and configuring and monitoring organizational processes, like performance reviews, engagement surveys, and compensation review cycles.

The People Ops Admin role **has access** to all sensitive data including compensation, with the ability to edit and make permanent changes to the primary environment. This role has the ability to configure and manage Fields, Forms, Categories, Profile Tabs, and Actions, among others.

This role **does not have access** to change user permissions, configure integrations, or alter organization-wide settings.

For most organizations, this role should be the most commonly-used administrator role.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Managing headcount plans and jobs, including merging scenario proposals into your primary org data
- Employee data management
- Sending out Engagement surveys and monitoring the results

Common organization titles for users who need the Org editor access role:

- Head of People Ops
- Chief Finance Officer
- VP of HR

The tables below list how users with this role can use the respective pages.

Sensitive data

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

ChartHop feature	Capabilities
Sensitive data access	• Can view and edit their own compensation data and personal data. • Can view and edit all compensation data, personal information, and all other sensitive data.
View as	• Can view ChartHop as another user to verify what they can view and access.

Employee pages

ChartHop feature	Capabilities
Org Chart	• Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data in employee profile pages, including compensation.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data, including compensation.
Map	• Can edit their own location and the location data of others.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can merge a scenario to the primary org. • Can see all sensitive data changes, including job changes and compensation.
Employee profiles	• View other's public information. • Edit their own information. • Can edit others’ information, including job history.
Comp reviews	• Can create compensation reviews. • Can be assigned to be an approver or reviewer of a compensation review.
History	• Can view, filter and export historical data.

ChartHop feature	Capabilities
	• Can make changes to job history, including deleting previous changes
Files & Signatures	• Can view and edit the name and access of files • Can sent and cancel requests for signatures

Administration pages

ChartHop Page	Available actions
Fields	• Can create, edit, update, and delete custom fields • Can override ChartHop built-in fields • Can hide/unhide fields
Groups	• Can create and manage new groups, departments, and teams • Can assign employees to those groups
Compensation bands	• Can import and update compensation bands for the organization.
Import spreadsheet data	• Can import employee data by using a spreadsheet. Spreadsheet imports can include adding new employees, changing information for existing employees, adding open jobs, organizational history info, and financial information such as equity and compensation changes.
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization's applicant tracking system (ATS). • Can rerun data syncs.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.10. People Ops Admin (no comp data)

The People Ops Admin (no comp data) role should be given to employees in your organization responsible for making organizational updates such as adding or terminating employees, and configuring and monitoring organizational processes, like performance reviews, engagement surveys, and compensation review cycles.

The People Ops Admin role **has access** to all sensitive data **except compensation**, with the ability to edit and make permanent changes to the primary environment. This role has the ability to configure and manage Fields, Forms, Categories, Profile Tabs, and Actions, among others.

This role **does not have access** to change user permissions, configure integrations, or alter organization-wide settings.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Sending out Engagement surveys and monitoring the results
- Onboarding and offboarding employees

Common organization titles for users who need the Org editor access role:

- People Ops Manager

- Head of People Ops

The tables below list how users with this role can use the respective pages.

Sensitive data

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

ChartHop feature	Capabilities
Sensitive data access	• Can view their own compensation data and personal data.

Employee pages

ChartHop feature	Capabilities
Org Chart	• Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data in employee profile pages, *except for* compensation.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can add or delete data about jobs or people, including making job transfers, terminations, and new jobs. • Can edit sensitive data, but not compensation.
Map	• Can edit their own location and the location data of others.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them. • Can merge a scenario to the primary org. • Can see sensitive data changes, *excluding compensation changes*.
Employee profiles	• View other's public information. • Edit their own information. • Can edit others’ information, including job history.
Comp reviews	• Can create compensation reviews. • Can be assigned to be an approver or reviewer of a compensation review.
History	• Can view, filter and export historical data, except compensation historical data

ChartHop feature	Capabilities
	• Can make changes to job history, including deleting previous changes, except for compensation history
Files & Signatures	• Can view and edit the name and access of files • Can sent and cancel requests for signatures

Administration pages

ChartHop Page	Available actions
Fields	• Can create, edit, update, and delete custom fields • Can override ChartHop built-in fields • Can hide/unhide fields
Groups	• Can create and manage new groups, departments, and teams • Can assign employees to those groups
Compensation bands	• Can import and update compensation bands for the organization.
Import spreadsheet data	• Can import employee data by using a spreadsheet. Spreadsheet imports can include adding new employees, changing information for existing employees, adding open jobs, organizational history info, and financial information such as equity and compensation changes.
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization's applicant tracking system (ATS). • Can rerun data syncs.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.11. People Ops Admin (no sensitive data)

The People Ops Admin (no sensitive data) role should be given to employees in your organization responsible for configuring and monitoring organizational processes, like performance reviews, engagement surveys, and compensation review cycles.

The People Ops Admin role **has access** to configure and manage Fields, Forms, Categories, Compensation Reviews, Profile Tabs, and Actions, among others.

This role **does not have access** to see sensitive data, change user permissions, configure integrations, or alter organization-wide settings.

For most organizations, this role should be the most commonly-used administrator role.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Sending out Engagement surveys and monitoring the results
- Configuring and monitoring a Performance Review Cycle or Compensation Review Cycle

Common organization titles for users who need the Org editor access role:

- People Ops Manager
- People Ops Associate

- HR Associate

The tables below list how users with this role can use the respective pages.

Sensitive data

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

ChartHop feature	Capabilities
Sensitive data access	• Can view their own compensation data and personal data.

Employee pages

ChartHop feature	Capabilities
Org Chart	• Can view and filter
Data Sheet	• Can create custom views • Can share views • Cannot edit any data other than their own personal information
Map	• Can edit their own location
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them.
Employee profiles	• Can view others' public information. • Can edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
Comp reviews	• Can create compensation reviews. • Can be assigned to be an approver or reviewer of a compensation review.
History	• Can view, filter and export org public historical data and other historical data they otherwise have access to (i.e. personal historical data and historical data for those in their reporting line) • Cannot make any changes.
Files & Signatu	• Can view and edit the name and access of files that they already have access to

ChartHop feature	Capabilities
res	• Can sent and cancel requests for signatures of files that they already have access to

Administration pages

ChartHop Page	Available actions
Fields	• Can create, edit, update, and delete custom fields • Can override ChartHop built-in fields • Can hide/unhide fields
Groups	• Can create and manage new groups, departments, and teams
Compensation bands	• Can import and update compensation bands for the organization.
Import spreadsheet data	• No access
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization's applicant tracking system (ATS). • Can rerun data syncs.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.12. Recruiting editor

The Recruiting editor role allows recruiters to open and fill new jobs, including merging a hiring plan scenario to the primary ChartHop organization.

Those with the Recruiting editor can access their own sensitive data and the compensation data of those that report to them. They can view sensitive data associated with the open jobs they create and manage. Those with this role cannot perform any ChartHop administrative functions other than /monitoring the Sync History page.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

Typical ChartHop responsibilities for someone with this role:

- Creating new jobs.
- Viewing open jobs and the sensitive data associated with them.
- Monitoring data flow between ChartHop and an integrated applicant tracking system (if implemented).

Common organization titles for users who need the Recruiting editor access role:

- Head of Talent Acquisition

The tables below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

> Only users with sensitive data access can view future-dated org changes, such as unannounced promotions and so on.

- Can view their own compensation data and personal data.
- Can view compensation data for those in their reporting line.
- Can view and edit sensitive data related to open jobs.

Employee pages

ChartHop page	Capabilities
Org Chart	• Can add or delete data about jobs.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can add or delete data about jobs.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data. • Can edit and delete open jobs.
Comp reviews	• Can view comp reviews that they are invited to review or approve.

Administration pages

ChartHop page	Available actions
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization's applicant tracking system (ATS). • Can rerun an ATS sync operation.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.13. Recruiter

Those with the Recruiter role can view all open jobs and the sensitive data associated with those jobs.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Viewing open jobs and the sensitive data associated with them.
- Monitoring data flow between ChartHop and an integrated applicant tracking system (if implemented).

Common organization titles for users who need the Recruiting editor access role:

- Recruiter
- Talent Acquisition Partner
- Recruitment Specialist

Sensitive data

- Can view their own compensation data and personal data.
- Can view the compensation data of those that report to them.
- Can view sensitive data related to open jobs.

Employee pages

The table below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

ChartHop feature	Capabilities
Org Chart	• Can view open jobs.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can view open jobs.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can view scenarios that have been shared with them. • Can create new scenarios.
Employee profiles	• View others' public information. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data.
Comp reviews	• Can view comp reviews that they are invited to review or approve.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.14. Sensitive data viewer

Those with the Sensitive data viewer role can view all sensitive data, including all types of compensation and all personal information for all employees. Someone with the Sensitive data role can also view the Sync history page, which tracks employee and job data flow between other systems and ChartHop.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Activities related to employee addresses and personal information.
- Activities related to compensation.

Common organization titles for users who need the Sensitive data access role:

- HR Business Partner
- Head of DEI
- People Operations Analyst

The tables below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

ChartHop feature	Capabilities
View as	• Can view all sensitive data, including employee personal information and all compensation.
View as	• Can view ChartHop as another user to verify what they can view and access.

Employee pages

ChartHop feature	Capabilities
Org Chart	• Can view all sensitive data, including open jobs.
Data Sheet	• Can create custom views. • Can share views. • Can view open jobs.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can view scenarios that have been shared with them. • Can create new scenarios.
Employee profiles	• View all information on employee profiles, including personal data, all compensation, and all forms. • Edit their own information. • Set what information of theirs that others can see.
History	• Can view, filter and export historical data.
Comp reviews	• Can view compensation reviews that they are invited to review or approve.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.15. Sensitive data (limited comp)

Those with the Sensitive data (limited comp) role can see all sensitive data except compensation for those outside their reporting line.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Activities related to employee addresses and personal information.

Common organization titles for users who need the Sensitive data access role:

- HR Business Partner
- Head of DEI
- People Operations Analyst

The tables below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

Sensitive data

ChartHop feature	Capabilities
Sensitive data access	• Can view their own compensation data and personal data. • Can view all sensitive data except for compensation of those outside their reporting line.
View as	• Can view ChartHop as another user to verify what they can view and access.

Employee pages

ChartHop feature	Capabilities
Org Chart	• Can view all sensitive data, including open jobs. • Cannot view compensation except for themselves and those in their reporting line.
Data Sheet	• Can create custom views. • Can share views. • Can view open jobs.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can view scenarios that have been shared with them. • Can create new scenarios.
Employee profiles	• View all information on employee profiles, including personal data and all forms. • Edit their own information. • Set what information of theirs that others can see. • Can only view compensation for themselves and those in their reporting line.
History	• Can view, filter and export historical data.
Comp reviews	• Can view compensation reviews that they are invited to review or approve.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.4.16. Technical owner

The Technical owner role is the second most broad access role that can be granted. Those with the Technical owner role can access organization-wide administration pages to create new fields and forms, create groups and configure organization-wide settings.

Someone with this role can configure integrations with ChartHop, such as a payroll app or Slack. Technical owners are also allowed to install ChartHop bundles which can contain forms, fields, and dashboards. Users with this role can grant others access to ChartHop.

Those with the Technical owner role have NO access to sensitive data except their own and of those who report to them.

All roles have standard access, which includes the following:

- Access to all non-administrative functions of ChartHop, including scenarios and dashboards.
- Ability to view their own compensation data and the compensation data of those who report to them.
- Can edit or hide their own personal data.

Data sharing rules apply to all users regardless of role. Owners of artifacts like scenarios, dashboards, compensation reviews, and forms can restrict access to the respective artifact by person or filter.

You can apply a filter to this role to have it apply to a subset of users; for example, all managers within a department or only HR leaders in a specific location.

Typical ChartHop responsibilities for someone with this role:

- Installing and managing data integrations
- Creating forms and fields, including determining data types to use for fields and where and when forms are displayed in ChartHop.
- Configuring ChartHop for use within your organization, including org-wide settings like configuring SSO, org currencies, and so on.
- Inviting employees to use ChartHop and granting access roles.
- Creating and sharing dashboards.

Common organization titles for users who need the Technical Owner access role:

- PMO
- IT/DevOps

Sensitive data

- Can view their own compensation data and personal data.
- Can view compensation data for those in their reporting line.

Employee pages

The tables below list how users with this role can use the respective pages. If a page is not listed, the role does not grant access to that page.

ChartHop page	Capabilities
Org Chart	• Can view and filter.
Data Sheet	• Can create custom views of the Data Sheet. • Can share views. • Can export. • Can add or delete data about jobs or people.
Map	• Can edit their own location.
Home page	• Can view all public information. • Can view and complete their own tasks.
Dashboards	• Can create dashboards. • Can view dashboards that have been shared with them.
Scenarios	• Can create scenarios. • Can view scenarios that have been shared with them.
Employee profiles	• View others' public information. • Can edit and delete the personal history of all profiles. • Edit their own personal information. • Set what information of theirs that others can see. • Can view compensation data for those in their reporting line. • Can view manager-shared forms that are part of the profile, such as 1:1 forms.
History	• Can view, filter and export historical data. • Can edit and delete historical changes.
Compensation reviews	• Can view and approve a comp review that they have been assigned.

Administration pages

ChartHop page	Capabilities
Groups	• Can create new groups, departments, and teams and place employees in those groups.
Users	• Can manage user access for ChartHop, including inviting employees, assigning roles, and creating new users.
Org settings	• Can configure organization-wide settings such as currency, home page customizations, logo, and so on.
Fields	• Can create new custom fields and edit custom fields.
Categories	• Can create and edit field categories.
Forms	• Can create, edit and configure settings for forms.
Tasks	• Can delete and send reminders for tasks
Profile tabs	• Can customize employee profile tabs.
Apps	• Can install app integrations and pre-configured bundles of fields and forms.
Sync history	• Can monitor the sync history page to view job data flow from ChartHop to an organization's applicant tracking system (ATS). • Can manage app settings.
Actions	• Can customize ChartHop actions that trigger events such as sending reminders.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.1.5. Controlling sensitive data

> **Modules:** HRIS | **Engagement** | **Goals** | **Performance** | Compensation Reviews | **Headcount Planning**

You can set sensitivity levels on certain data in ChartHop to ensure that only users with permission to see sensitive data can view it.

Controlling the sensitivity levels on the custom fields and forms you use in ChartHop allows you to ensure your organization has the right data to make decisions and that sensitive data isn't shared with employees who shouldn't see it.

> You can't change the sensitivity level for a built-in ChartHop field. Use the Fields page to view the sensitivity levels for the fields used in ChartHop. **Learn more.**

Assigning sensitivity levels to specific data ensures that data is shared only with the appropriate users (for example, 1:1 notes or planning scenarios are shared only with managers).

You can customize the sensitivity levels on the following aspects of ChartHop:

- Custom forms
- Custom fields
- Custom profile tabs

Sensitivity Levels

The following sensitivity levels are available within ChartHop:

Sensitivity Level	Description	Examples
Org Public	Visible to the entire organization (in other words, this is data that is considered public knowledge within a single organization).	Org chart and structure
Manager - Shared	Use this option to grant access to an item to a manager and direct report that it is associated with. Visible only to the following: * the specified person * anyone to whom they report * users with sensitive access	- Compensation information for direct reports. - Manager 1:1 forms.
Manager - Only	Use this option to grant access to the employee's manager only. Visible only to the following: - anyone to whom they report - users with sensitive access Users who have no direct reports and do not have sensitive access will not see Manager-Only fields at all — including the existence of the field.	Manager performance reviews
Personal	Visible only to the following: - the specified person - users with sensitive access	Birth Year
Highly Sensitive	The most restrictive sensitivity level. The field — including its name — is completely hidden from users who do not have sensitive access. It will not appear in dropdowns, menus, visualize options, or anywhere else in the UI for those users. Only visible to users with sensitive access.	* Future-dated org changes * Internal HR notes * Personal address

Sensitivity Level	Description	Examples
		* PTO information * Compensation information

Highly Sensitive fields are fully hidden, not just redacted. Unlike lower sensitivity levels that may show a field name while hiding its value, Highly Sensitive fields are invisible in their entirety to users without sensitive access.

Verifying sensitivity levels for field data

ChartHop's built-in fields have default sensitivity levels that you can't change. For example, personal data fields like home address and home email have a data sensitivity level of Personal. However, your organization may have created additional fields for employee data that are org public. To keep yourself up-to-date on the sensitivity levels for the fields in your org, use the **Fields** page to view this information.

To verify your organization's data sensitivity for fields:

1. From the left sidebar, select the Settings (gear) menu and select **Fields**.
2. On the **Fields** page, sort the list by the Sensitivity column. You can choose **Sort asc** or **Sort desc**. The list sorts and you can scroll to view the sensitivity levels for particular fields.

Please consult our privacy policy for more information about how we protect your sensitive data and how it is used.

5.11.2. User management

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

> **Roles**: Owner | Technical owner

You can manage how your organization's users access ChartHop as well as control how and when employees are invited to ChartHop.

How you can invite users and what data access roles you can use depends on the ChartHop package you are using.

ChartHop customers can create rules and filters on which to automatically send user invitations, such as deciding not to invite contractors to use ChartHop.

ChartHop Basic customers can configure automatic invitations to users, but cannot apply filters or rules. ChartHop Basic users also have less granular access rules.

The User Management page is available to all packages and helps you view and manage your ChartHop users.

- **Inviting users** to the organization
- **Managing users**
- **Assigning roles**
- Removing users
- Revoking user sessions
- Managing user access privileges
- Editing user information
- User management settings

5.11.2.1. Inviting users

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

Roles: Owner | Technical owner

After you create your ChartHop organization, you can start inviting employees to use ChartHop. You can invite people to ChartHop users either automatically or manually.

You can also add ChartHop users that are not a part of your organization. **Learn more.**

Start by inviting specific individuals to try ChartHop. For people in functions such as People, Recruiting, IT, or Finance, you can set their permissions appropriately from the User Management page. *Most* people should be set to the Employee role.

The method you use and the roles available to grant users differ depending on the ChartHop package you are using.

ChartHop package	Invitation method
ChartHop Basic	• **Automatically invite users and assign roles:** ChartHop Basic customers can configure automatic invitations from the Org Settings page. ChartHop Basic users can have one of two roles: Employee or Owner. **Learn more.** • **Manually invite users and assign roles.** Use User Management page. **Learn more.**
ChartHop Headcount Planning, Comp Reviews, Performance, Enablement	• **Automatically invite users and assign roles:** ChartHop Standard and ChartHop Premium customers can use the User Access manager to automatically invite users. ChartHop Standard includes multiple roles including specialized roles for recruiters. ChartHop Standard customers can create rules and filters on which to automatically send user invitations, such as deciding not to invite contractors to use ChartHop. **Learn more.** • **Manually invite users and assign roles**. Use the User Management page. **Learn more.**

Should you invite everyone?

Do what makes the most sense for your own organizational culture, but we believe everyone benefits from better transparency, communication, and context.

Inviting individual contributors into ChartHop will help everyone know what roles are open, review their own compensation, get context on org structure and people around the organization, and communicate organizational changes with clarity.

It's especially helpful for people who are onboarding and finding their way around! In our experience anywhere from 10-25% of an organization will usually log into ChartHop on a daily basis.

Sample messages

Human resources / finance team

Attention team,

You should have all received a welcome email to ChartHop. We will be using ChartHop for hire planning, compensation planning, employee performance, 1on1s, and reporting moving forward.

We will be rolling this out to the executive team and all managers in the coming weeks and shortly after, to the rest of the organization. Please get familiar with navigating in ChartHop. If you have any questions, please reach out to IT.

Setup

1. Please login using the required SSO login. If you have any issues, please reach out to IT.
2. Please check your employee profile by clicking on your profile icon at the top right and clicking "My Profile." Fill out the company questionnaire, "About Me." Everyone in the organization can view when to best contact you, information about your working style, and random fun facts.

If you have any issues or see any inaccurate data reflected in ChartHop, please reach out to (contact name on HR team).

Executives / managers

Attention team,

You should have all received a welcome email to ChartHop. We will be using ChartHop for hire planning, compensation planning, employee performance, 1on1s, and reporting moving forward.

Please ensure you are familiar with the platform and ready for any questions from your team as we will be rolling this out to the rest of the organization on MM/DD/YYYY.

Setup

1. Please login using the required SSO login.
2. Please check your employee profile by clicking on your profile icon at the top right and clicking "My Profile." Fill out the company questionnaire, "About Me." Everyone in the organization can view when to best contact you, how to contact you, and random fun facts.
3. Ensure all your direct reports are accurately reflected under Job Details in your employee profile. If any information is incorrect, please reach out to the people team.
4. Access your department page via the search engine and fill out this year's KPIs. *(Feel free to remove if your organization does not use KPIs)*

If you have any issues or see any inaccurate data reflected in ChartHop, please reach out to IT.

Individual contributors

Attention Everyone,

You should have all received a welcome email to ChartHop. We will be using ChartHop moving forward to give you access to everything you need to know about your colleagues and personal information as well as company structure. You and your manager will start using ChartHop to track your 1on1s and Performance Review cycles progressively. Please make sure you are familiar with navigating around ChartHop and let your manager know if you have any questions.

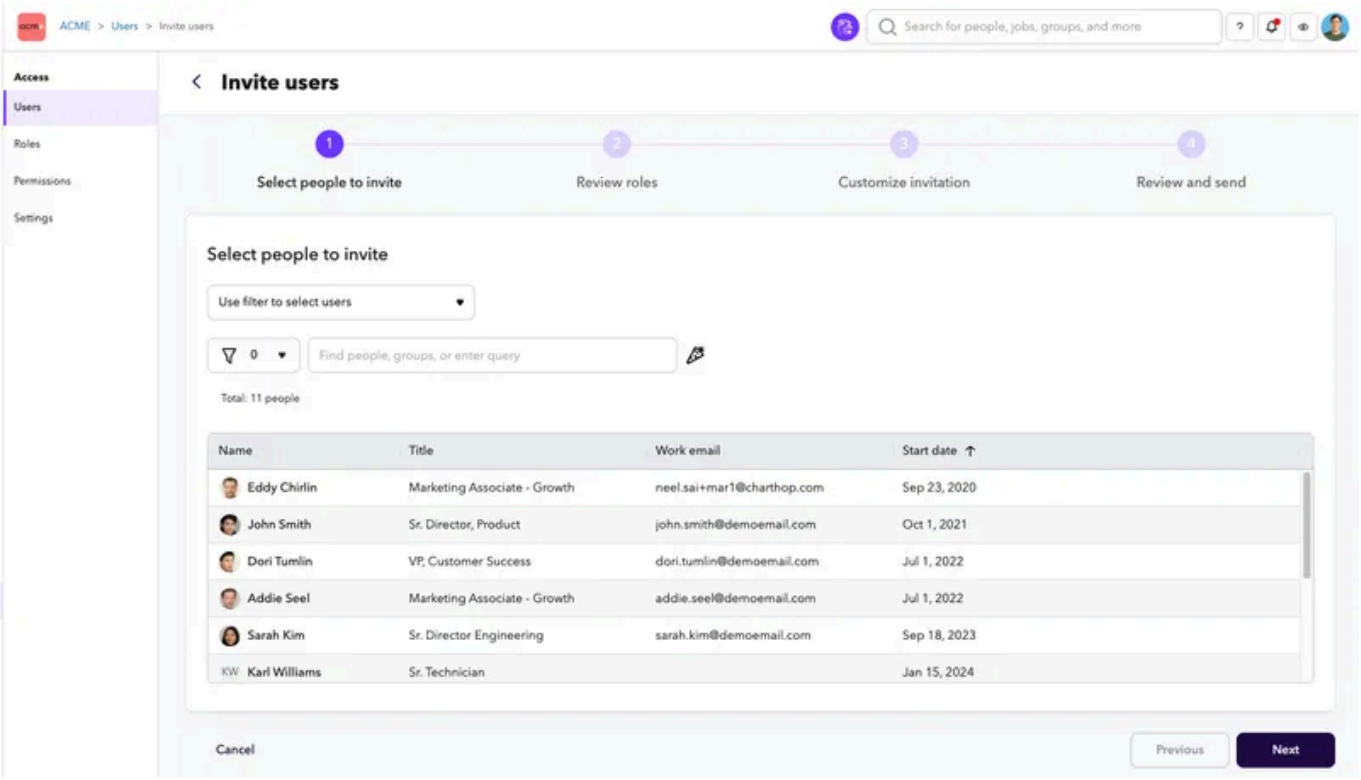
Setup

1. Please login using the required SSO login. If you have any issues, please reach out to IT.
2. Please check your employee profile by clicking on **My Profile** on the left sidebar. Fill out the company questionnaire, "About Me." Everyone in the organization can view when to best contact you, how to contact you, and random fun facts.

If you have any issues or see any inaccurate data reflected in ChartHop, please reach out to IT.

5.11.2.1.1. Manual invitations

You can manually send invitations to users to make them members of your org. When you invite a user to ChartHop, they receive an email that allows them to set their password (if applicaple) and access ChartHop.



To send an invitation to a user:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected
3. From the **Users** page, select the primary button in the top right corner: "**Invite org members**" to launch the invitre or members flow
4. **Select people to invite** is the first step and will show all current employees in your org who have not yet been invited to ChartHop. Use a filter or individually select the people who you would like to inite to ChartHop.
    1. Terminated and preboarding employees will not be shown here. Preboarding employees can be invited from the Onboarding page.
5. **Review roles** will show you all of the roles that will be assigned to each user and their email address. It allows you to make edits to the assigned roles.

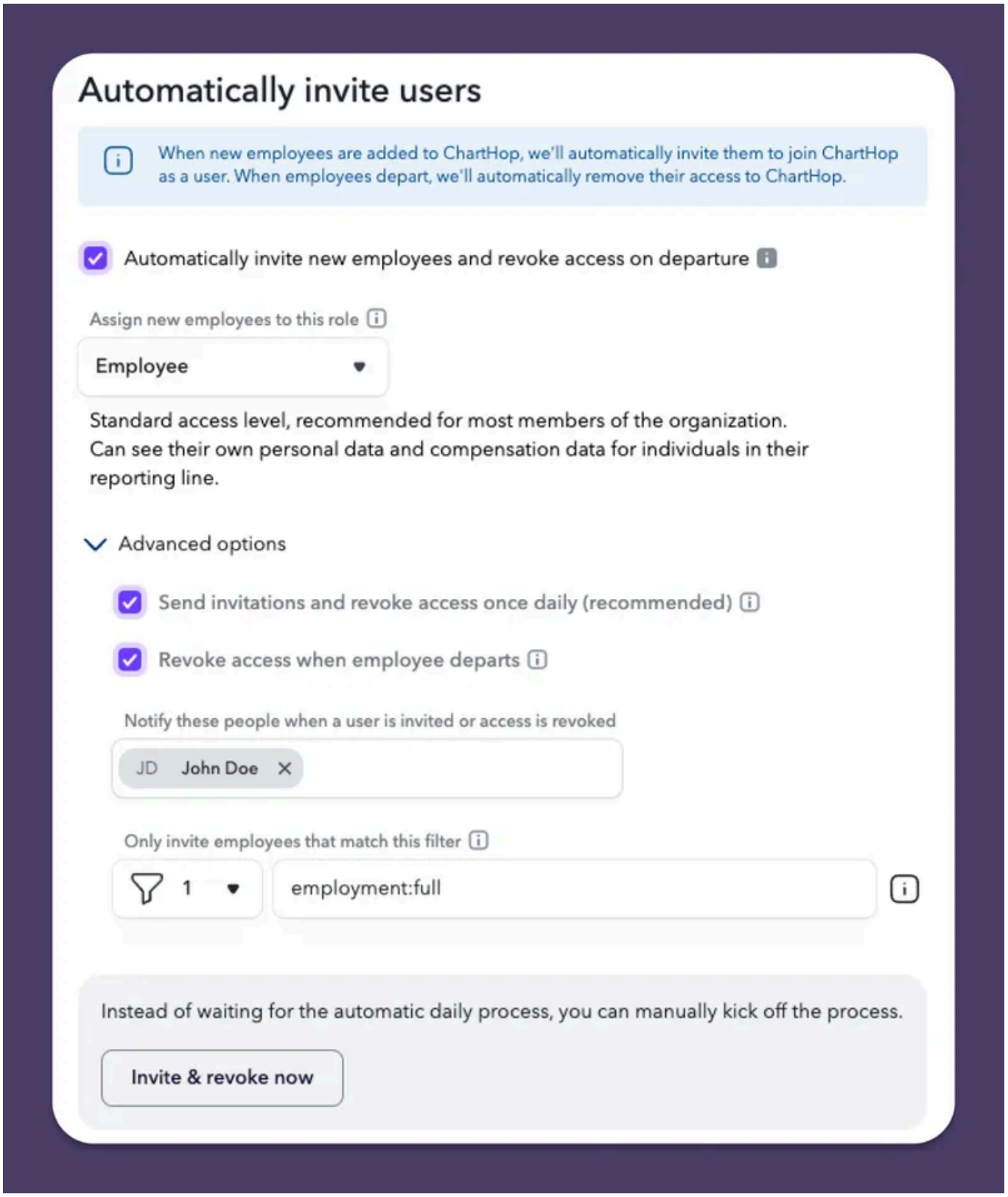
    1. Emails are required for every user.
6. **Customize invitation** allows you to make a one-off modification to the invitation template set in **Customizing invitations**.
    1. Toggle **Send notification using** "Do not send a message" if you don't want to send an email out to everyone at the time of invitation
7. **Review and Send** gives you a preview of what you are about to send.
8. Click **Send invitations** to invite the users.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.11.2.1.2. Automatic invitations

Roles: Owner

You can configure ChartHop to send invites to new employees automatically when you add them to ChartHop and remove them when they depart.



To configure Automatic invitations:

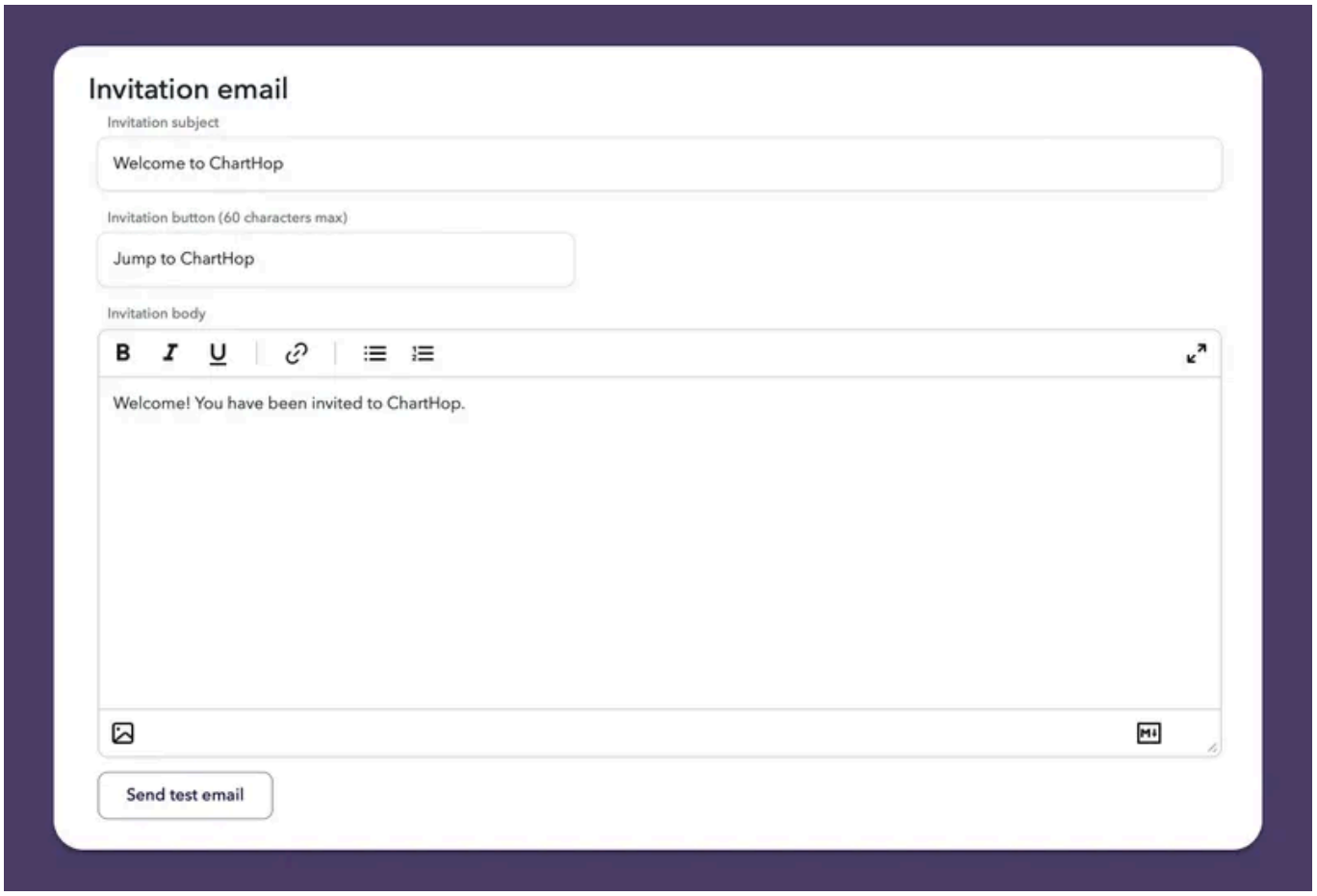
1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll to the **Automatically invite users** section.
4. From the general **Automatic invitations** page you can set:

- Whether to automatically invite new employees and revoke their access upon their departure or not.
- Default role assignments to new users invited to your organization.

5. In the **Advanced options** you can set:
    - When invitations will be sent a revoked:
        - By default, they are sent and revoked daily or if an employee is terminated on the same day then their are revoked as soon as they are terminated.
        - If you unckeck **Send invitations and revoke access once daily** (recommended) - Then you will need to send and remove access manually
        - If you unckeck **Revoke access when the employee departs** - Then invitations will be automatic, but you will need to send and remove access manually
        - If you unckeck **Immediately revoke access when employee departs** - Then if an employee is terminated on the same day then they will be removed the next day rather than immediately.
    - Employee's access rights to be revoked automatically upon their departure from the organization.
    - The list of specified users who will be notified when a user has been invited to, or has had their access revoked from, your organization.
        - A base or Carrot filter may be applied to limit the employee list. **Learn more**.
        - For example: Only send invitations to full time employees using: `employment:full`
6. In the upper right of the page, select **Save settings** when you're done.

5.11.2.1.3. Customizing invitations

Using the **Customize Invitation** tab, you can create a custom email template to invite users to your ChartHop organization.



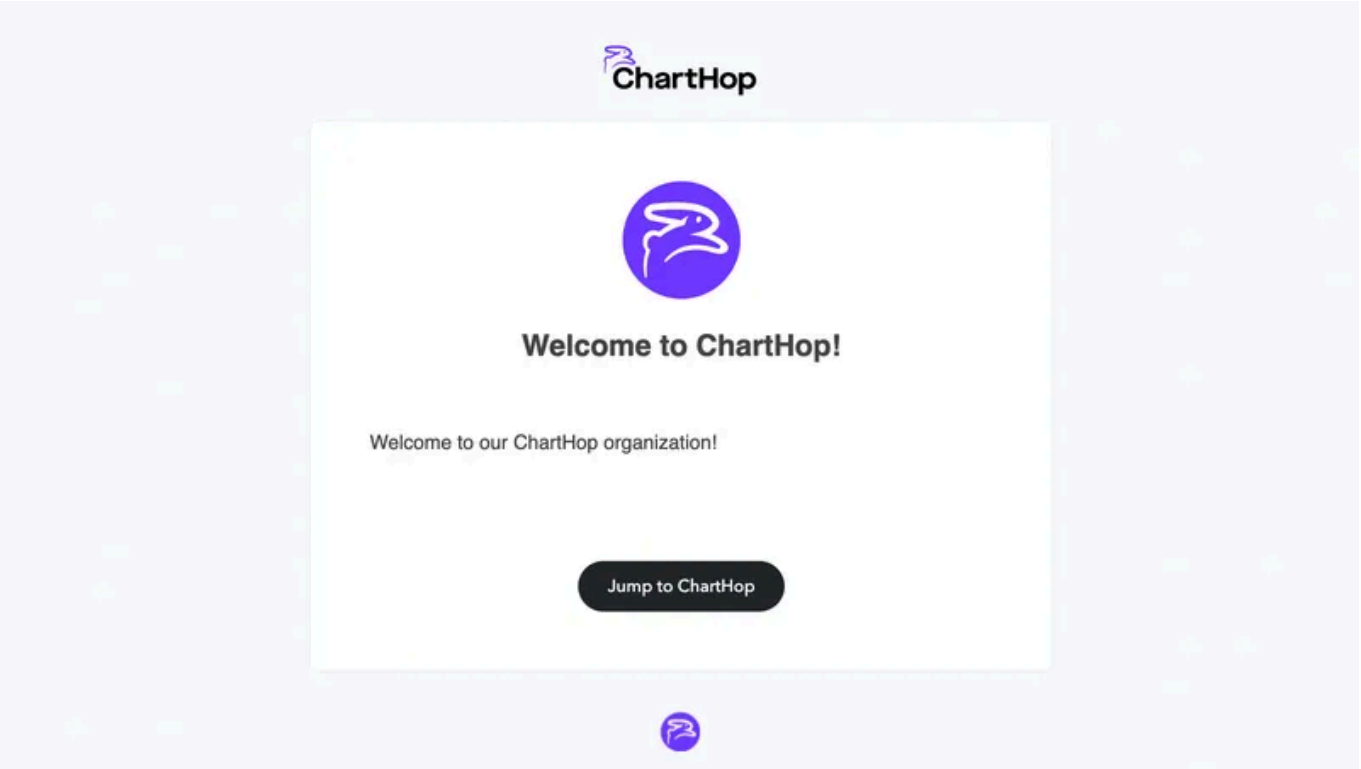
Create a custom welcome email

To customize the welcome email that invites users to access your ChartHop organization:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll to the **Invitation Email** section on the page
4. Create or edit your custom welcome email message using the Rich Text editor or using Markdown.
5. Select **Save settings** when you've completed your email template.

Send test email

Once you've created an email template, you can test how it looks by selecting **Send test email**. Selecting the **Send test email** button automatically sends a test email to your registered email address.



Basic | HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.11.2.1.4. User Access Manager

Managing User Access in ChartHop

ChartHop's Access Settings let you automatically invite employees to the platform, manage their access level, and ensure departing employees lose access on their last day — all without manual effort.

You must have your Org Chart set up in ChartHop before configuring user access. Employees who appear in your Org Chart still need to be granted access before they can log in.

Navigate to Access Settings

Go to **Access > Settings** to find all user access configuration options. This page is divided into two sections: **User Management** and **Automatically Invite Users**.

User Management

The User Management section controls session and security settings that apply to all users.

Setting	What it does
Require sign-in every	Sets how frequently users must re-authenticate, in days.
Sign out after inactivity	Automatically signs users out after a set number of inactive days.
New user invitations expire after	Controls how long an invitation link remains valid before expiring.
Notify these people of user access level changes	Select users who should be notified when any user's access level changes.

Automatically Invite Users

This section controls how ChartHop invites new employees and removes access for departing ones.

When enabled, ChartHop will automatically invite new employees when they're added to your org and remove access when they depart.

Primary Setting

Automatically invite new employees and revoke access on departure — Check this box to enable automatic access management. Once enabled, you can configure the options below.

Assign new employees to this role — Sets the default role granted to newly invited employees. The default is **Employee**, which is the standard access level recommended for most members of the organization. Employees at this level can see their own personal data and compensation data for individuals in their reporting line.

Advanced Options

Setting	What it does
Send invitations and revoke access once daily *(recommended)*	Runs a daily sync to invite any new employees and revoke access for departing ones. Recommended for most organizations.
Revoke access when employee departs	Removes access on an employee's departure date as part of the daily sync.
Immediately revoke access when employee departs	Removes access as soon as a departure is recorded in ChartHop, without waiting for the daily sync.
Notify these people when a user is invited or access is revoked	Select users who should receive a notification when invitations are sent or access is removed.
Only invite employees that match this filter	Restricts automatic invitations to employees who meet a specific filter (e.g., dept:sales). If left blank, all employees with a work email are invited.
Allow employees matching this filter to use password-based login	Allows a subset of employees to log in with a password instead of SSO. Useful for employees who may not have SSO credentials.

Send Invitations On-Demand

Instead of waiting for the daily sync, you can manually trigger the process at any time by clicking **Invite & revoke now**. This is the recommended approach for your initial rollout — it lets you invite your full organization at once when you're ready.

Filter Examples

Use filters to control which employees receive automatic invitations.

Filter	Who it includes
employment:full	All full-time employees
is:manager	All employees who have direct reports
dept:sales	All employees in the Sales department
under:manager name	All employees under a specific manager, including skip-levels

For a full list of available filter fields and syntax, see ChartHop's Carrot documentation.

Additional Notes

- Employees not in your Org Chart cannot be invited through Access Settings. To invite outside users, go to the **Users** page.
- To change a user's role or grant advanced permissions, use the **Users** page. Automatic invitations can only assign Employee-level roles.
- If an employee is missing a work email in ChartHop, they will be skipped during the sync. Update their email in their profile and re-run the sync or click **Invite & revoke now**.

5.11.2.2. Managing users

The **Users** page in ChartHop is where you can add, update, and remove users from your account. You can find it by selecting **Access > Users**

Users are people who have access to login to ChartHop with a set access role.

The Users page lists the:

- **User** - The persons name as set in the user settings
- **Email** - current primary email for their ChartHop login
- **Status** - Preboarding or Active
    - Preboarding users will have unique login structures and will automatically be shifted to Active on their start date.
- **Invitation** - Invited - Join
    - **Invited** - has been sent an email to login to ChartHop but has not yet logged in.
    - **Joined** - has logged in and their last active time can be seen in the table.
- **Role** - the Role they are currently assigned
- **External to Org** - if they are not in a job within the organization
- **Filter limited** - Special rules applied to their access role
- **Last active -** When did they last login to ChartHop

Adding Users

Adding Org Members as Users

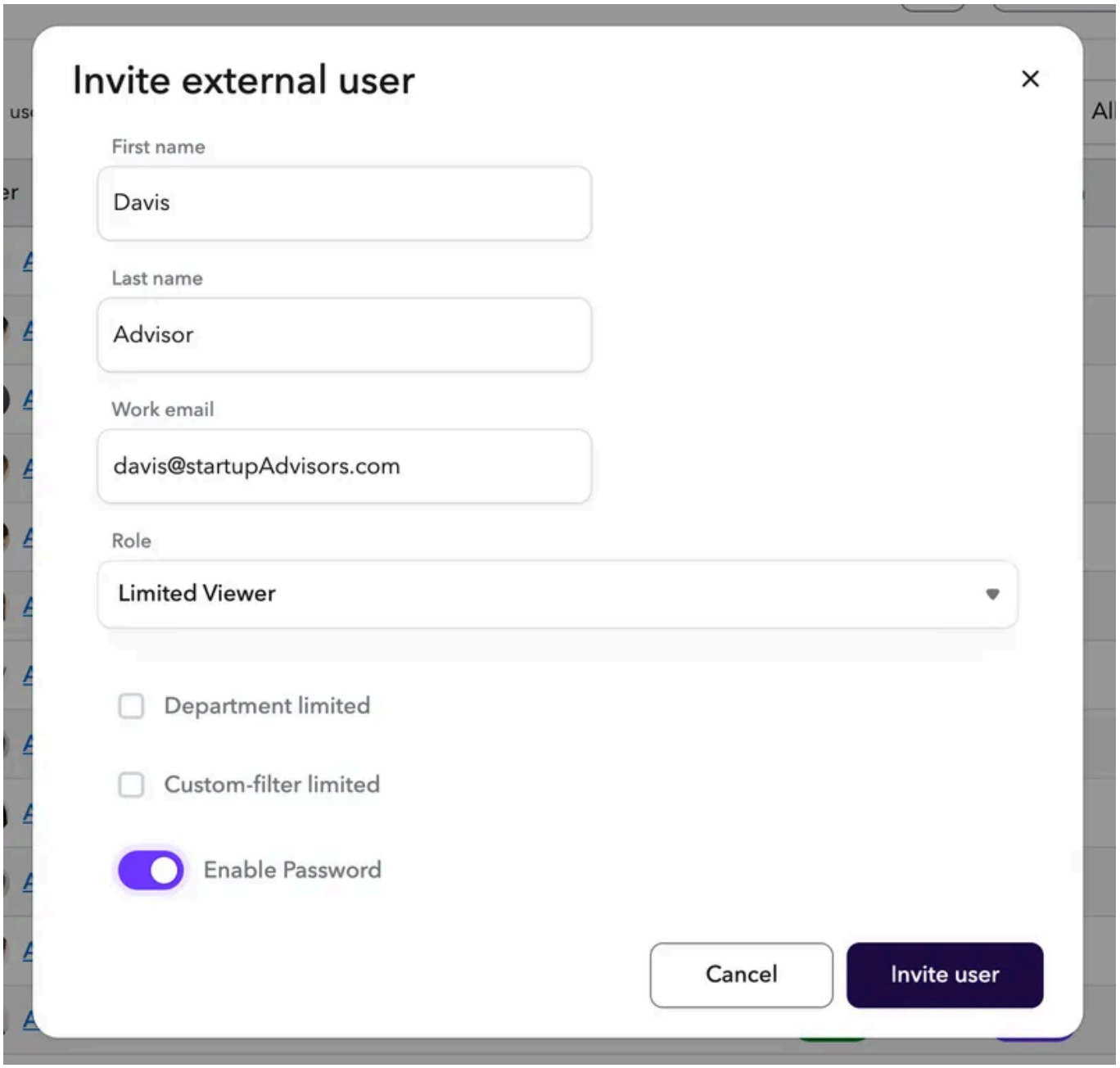
If you would like to add users, you can do so by going through the **inviting users** flows: the **Manual invitation flow** or the **Automatic invitation flow**.

Adding External Users

External users are people who are not "in a job" at your organization, but still may need access to your account or data. These might be people like Advisors, Board Members, HR/People Consultants, or Technical Consultants

To invite external users:

1. Navigate to the **Users** page
2. Clicking the **Invite external users** button in the top right corner.
3. Add in their **First name**, **Last name, Email,** and **Role**.
4. You will often want to select "**Enable Password**" for an external if they are not a part of your company SSO.
5. Click **Invite user** to invite the external user

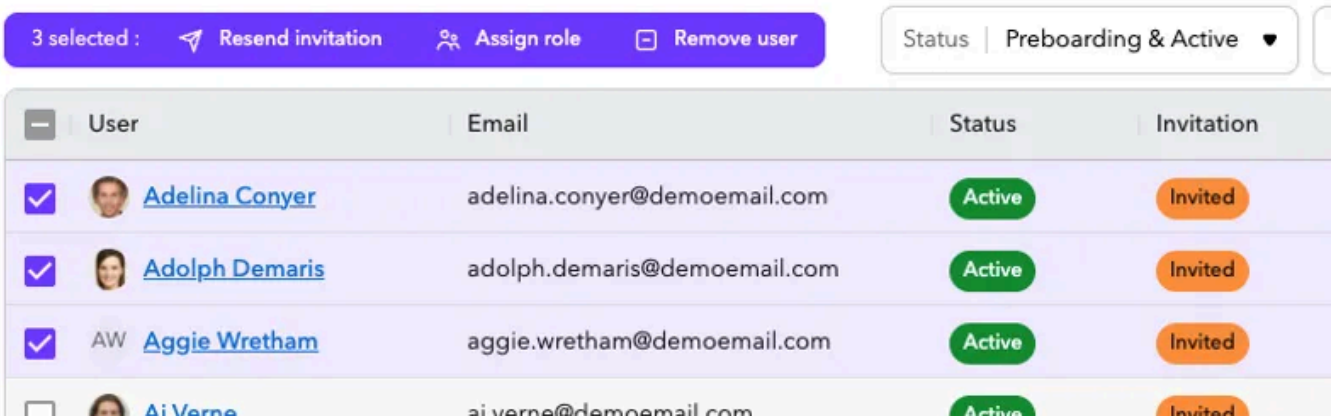


Resending ivitations

Users who have been invited to join your org, but have not yet logged in will be listed as `Invited`.

To resend an invitation to these users:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. From the **Users** list, select the checkbox users you would like to resend invitations to.
4. Click **Resend invitation** and the emails will automatically be sent.



Assigning Roles

Roles are primarity assigned either during the **Manual invitation flow** or by the **Automatic invitation flow**. Below on detail of how to update or edit a users role.

For **roles** with access to sensitive data, you can further customize the role by adding a filter that allows that person to see sensitive data for particular departments or by a custom filter that you can define.

Assign a role to an individual user

To edit a user's current roles:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. From the **Users** list, select the person's name whose role you want to edit.
4. Select their **role** from the dropdown in the **Edit user** dialog.

Assign roles to users in bulk

To edit a user's current roles:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. From the **Users** list, select all of the people who need to be assigned a new role.
4. Select their **role** from the dropdown and add any relevant filter limiting.
5. Then click **Assign role** to assign the role in bulk.

Add a filter for a user's role

For roles with access to sensitive data, you can further customize the role by adding a filter that allows that person to see sensitive data for particular departments or by a custom filter that you can define.

For example, a recruiter who focuses on sales roles may not need to access compensation for all open roles; they might only need access to the Sales department.

You can create filters to associate custom access rules to a person's role. For example, if you want a People Partner to have sensitive access to everyone in the New York office, but exclude executives and members of the Human Resources department, you could use the filter:

```
location:"new york" !team:executives !department:"human resources"
```

You can add filters to all roles except the Employee, Guest, and Recruiting editor roles.

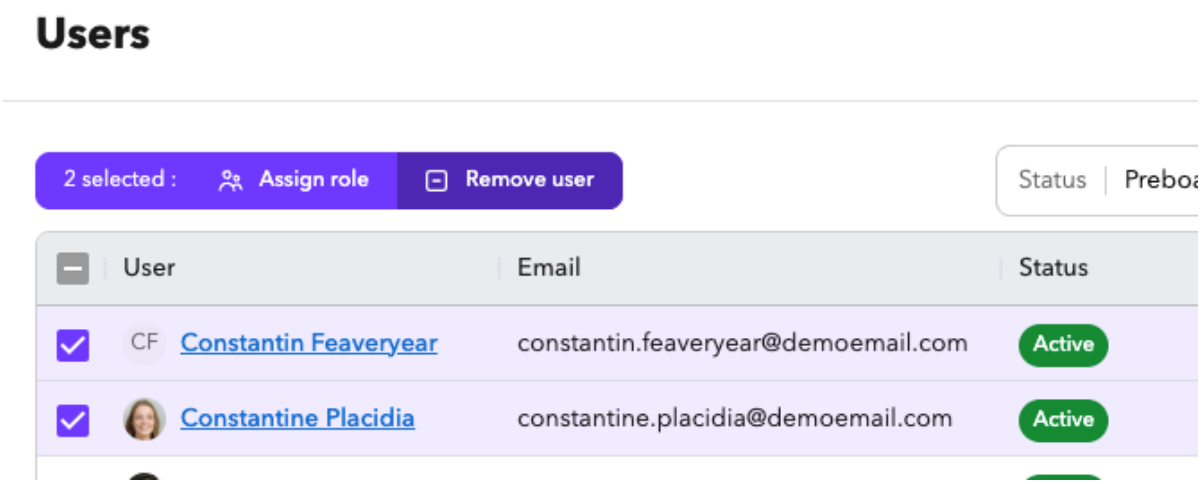
> If a user’s role is limited by a filter, the information they see for terminated employees will be limited.
>
> For example, if an HRBP has the role of an org editor with a custom filter for particular departments or locations, that person would not be able to see sensitive information for a terminated employee regardless of department or location.
>
> This is because terminated employees no longer belong to any groups. Role filters are seen as providing visibility to only certain groups or parameters. If someone with a role that uses a custom filter needs access to sensitive data for terminated employees, the workaround is to temporarily remove the filter.

To add a filter for a user's role:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. From the **Users** list, select the name of the user you want to edit.
4. In the **Edit user** dialog**,** use the **Role** dropdown to select the role you wish to assign to your user.
5. Scroll down within the dialog to view the filter checkboxes.
6. Choose one of the filters or use both to refine the user's role further.
    - **Department limited** -- Select this checkbox and type the names of a department or departments to which you want to limit this user's role.
    - **Custom-filter limited** --Select this checkbox and create a custom filter that defines the rules for this user's role.
7. Select **Save**.

Removing users

You can add and remove users from your ChartHop organization.



To remove users:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. From the **Users** list, select the checkbox for each user you wish to remove
    1. Tip: Filter to **Status: Invited** or **Status: Joined**
4. Select **Remove user** from the options bar.
5. Select **Remove user** from the **Remove user** dialog.

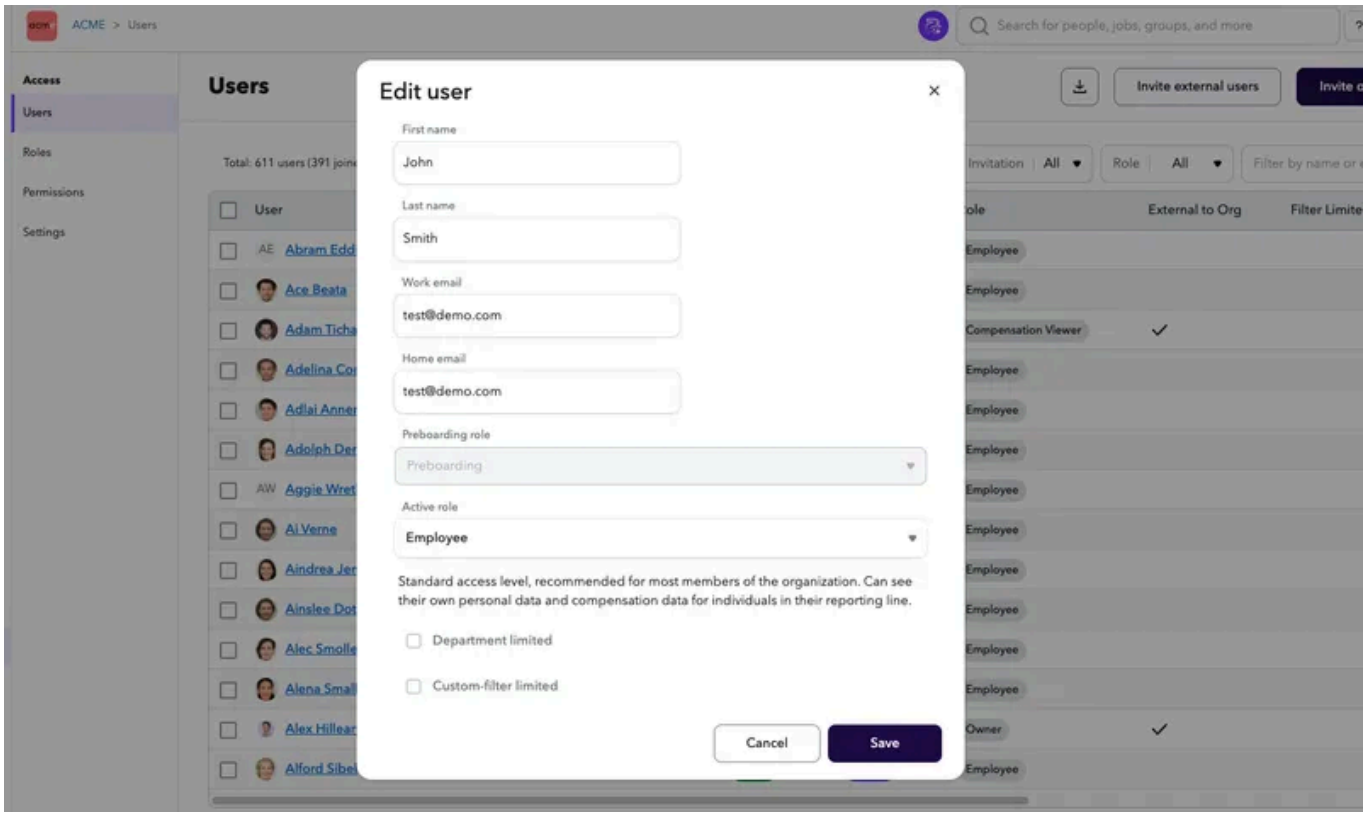
Editing user information

You can edit your user's information in your ChartHop organization.

To edit a user:

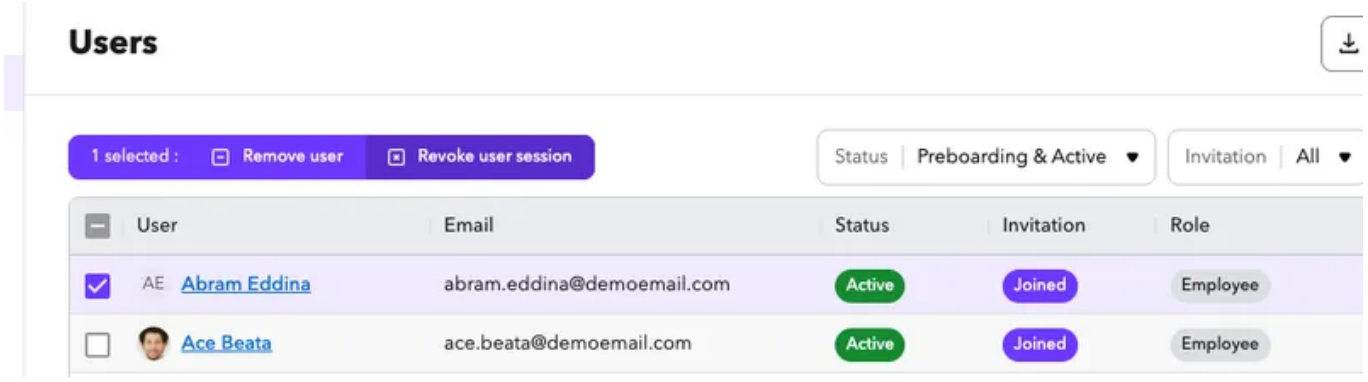
1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. From the **Users** list, select the name of the user you wish to edit.
    1. If you are unable to select the name of the user then you do not have permission to edit the user.
4. In the **Edit user** dialog, make changes to your user.
5. Select **Edit user** when you're done.

Note: Preboarding users will have additional options to edit the **home email** and the "Active role" that will be used when the user starts at the company.



Revoking user sessions

You can revoke user's sessions in your ChartHop organization. They will be required to reautheticate when the login again.



To revoke user sessions:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.

3. From the **Users** list, select the checkbox for each user you wish to revoke the session.
    1. Tip: Filter to **Status: Joined**
4. Select **Revoke user session** from the options bar.
5. Select **Revoke session** from the **Revoke user session** dialog.

Export a list of users

To export a list of users:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Users** if not already preselected.
3. In the top right corner, select the Export CSV icon button
4. Click **Export** in the Export CSV dialog.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.11.2.3. View as another user

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

Users with the appropriate permission can view ChartHop as a different user to verify what they can view. This is especially helpful for administrators who want to test or understand what an employee is seeing when they ask a question. When using **View as**, the administrator can only view as people who they can already access sensitive data to .

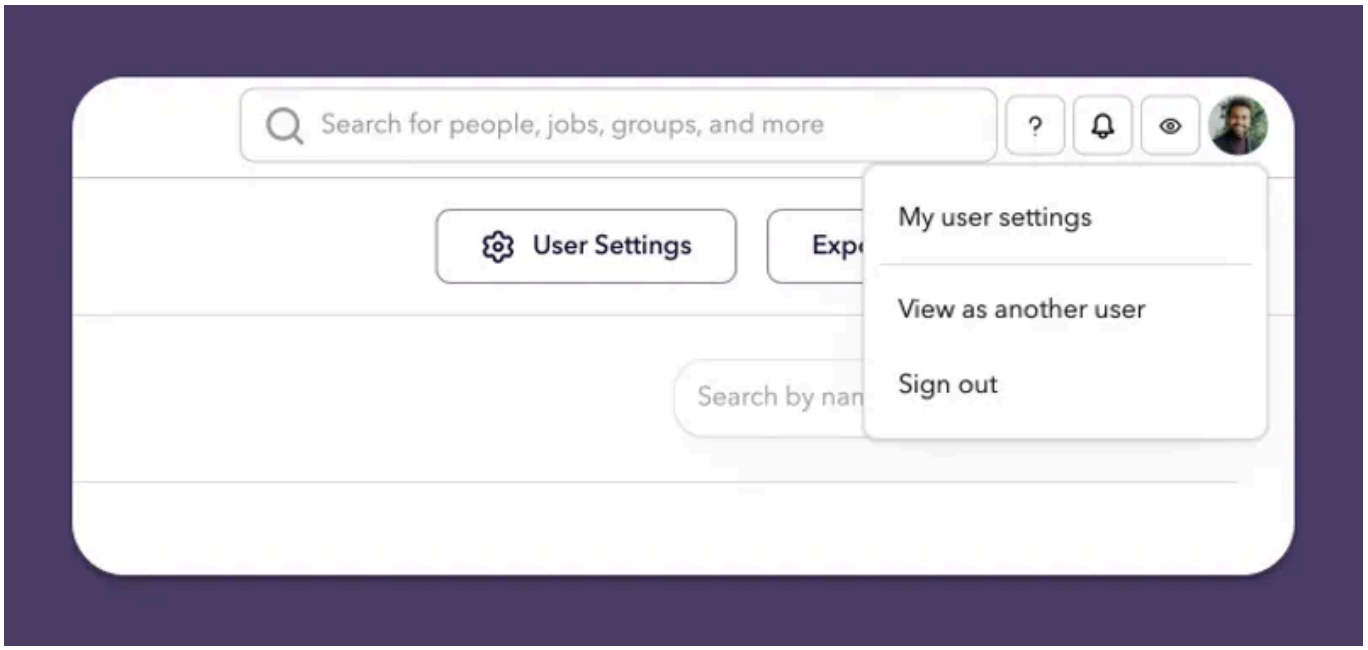
For example, after inviting new users, you can use the **View as** feature to view ChartHop as that user to preview what data they have access toto explore what data they have access to. You can also use **View as** to verify that a form or survey you've assigned to a user or group of users is displaying for the appropriate users. However, they cannot take actions, such as filling out a form, as that user.

> **Caution:** View as is a very powerful permission. It should be granted with caution.

View as example

Example: If a people ops business partner has the **People Ops Admin** role but with a filter that only allows them that access `department="Sales,Marketing,Operations"`, they will only be able to view as users in those 3 department since they only have access to sensitive data for those departments. However, if Finance rolls up to Operations, then they would be able to view as an Operations leader and then view data for the Finance team.

Example: If a people

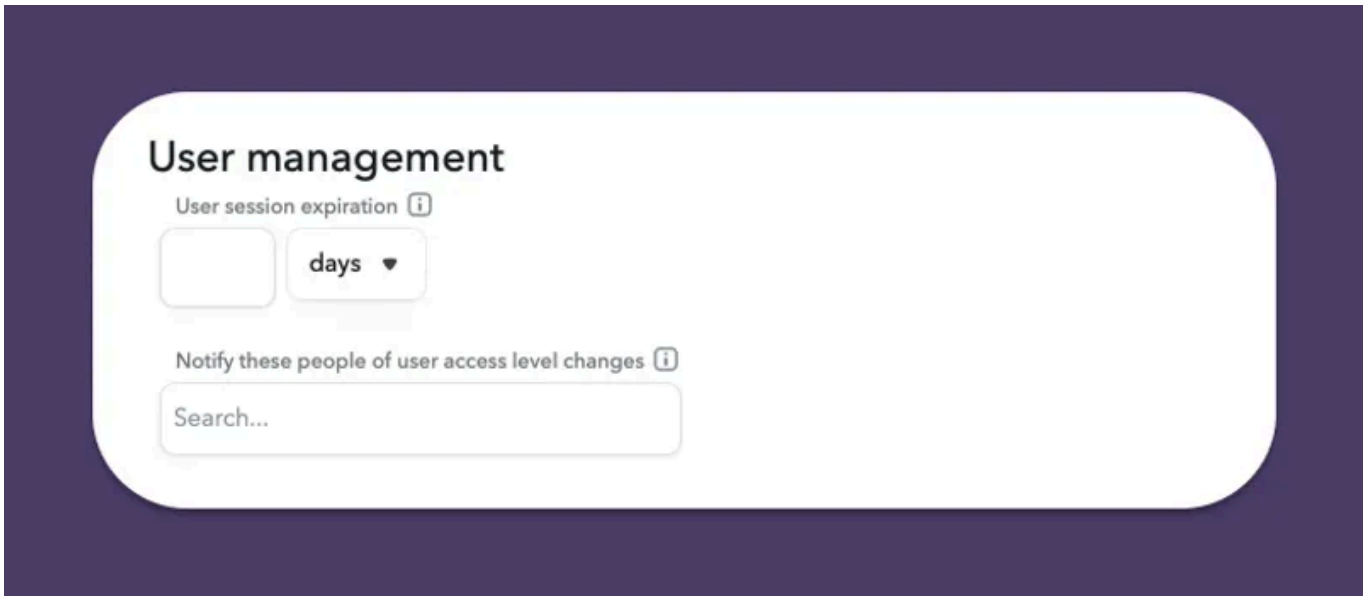


To view as another user:

1. Select your profile icon in the upper-right corner and choose **View as another user**.
2. In the **View as** dialog, enter the name of the user that you'd like to view as.
3. To stop viewing as the user you selected, select your profile icon and choose **Stop viewing as**.

5.11.2.4. User management settings

You can use **User management** settings to configure the length of user sessions in your ChartHop organization.



To manage user settings:

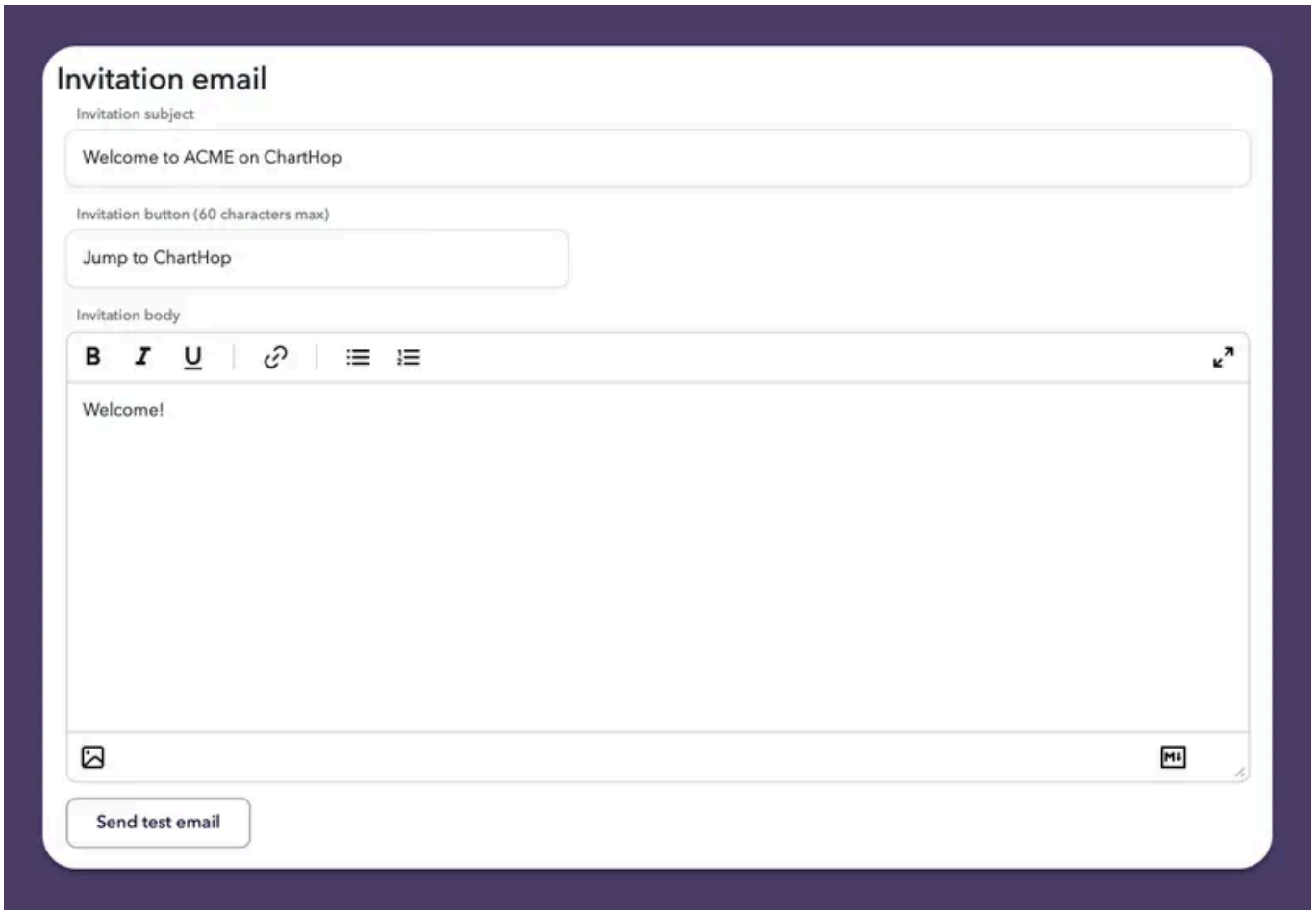
1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. In the **User management** section you can set:
    1. **User session expiration**: The length of time that a user's session will last before being automatically logged out.
    2. **Notify these people of user access level changes**: The added users will be notified of user access level changes.
4. Select **Save Settings** to confirm your changes.

> **Modules:** HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.11.3. Access Settings

5.11.3.1. Customizing a welcome email

In the **Access Settings** page, you can create a custom email template to invite users to your ChartHop organization.



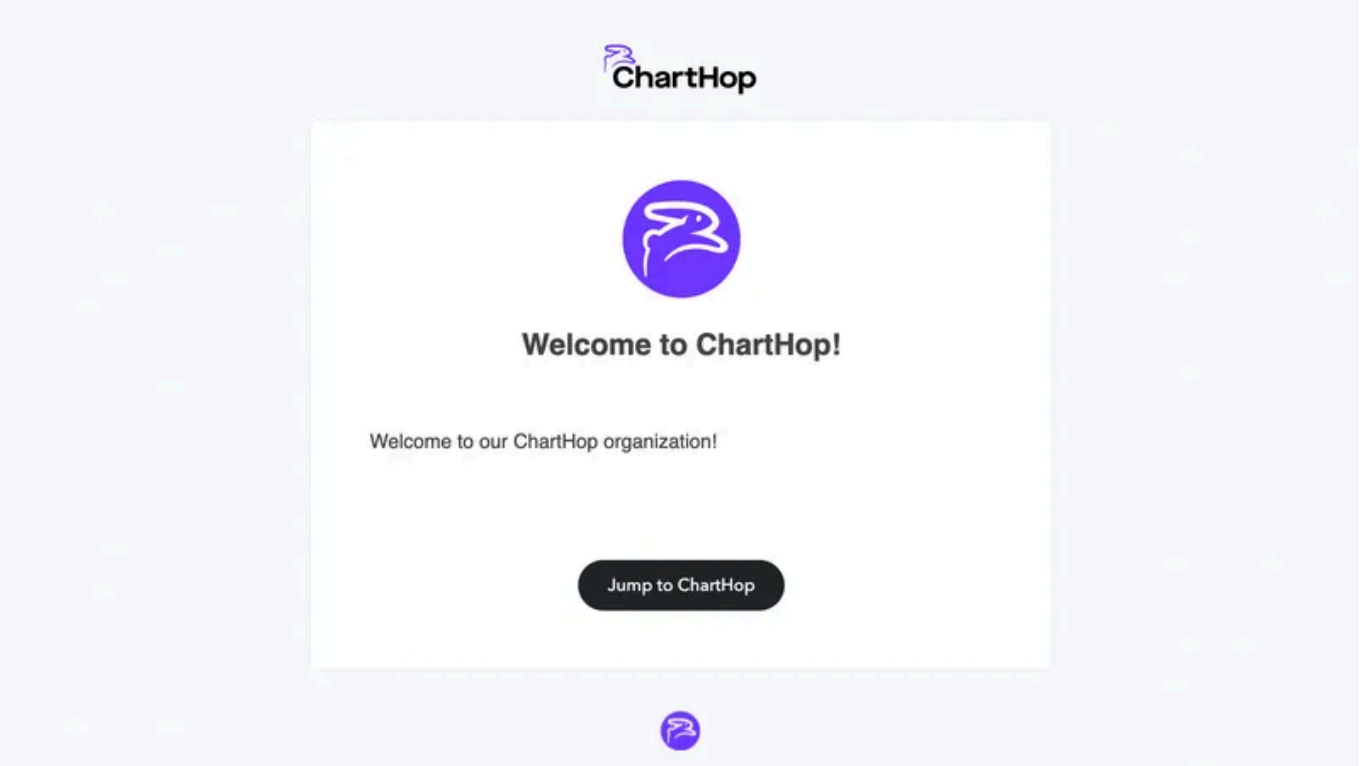
Create a custom welcome email

To customize the welcome email that invites users to access your ChartHop organization:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll down to the **Invitation email** section.
4. Create or edit your custom welcome email message using the Rich Text editor or using Markdown. You are able to use ChartHop fields for personalization using **Carrot.** such as "Hi, `{{name.first}}` ".
5. Select **Save settings** when you've completed your email template.

Send test email

Once you've created an email template, you can test how it looks by selecting **Send test**. Selecting the **Send test** button automatically sends a test email to your registered email address.



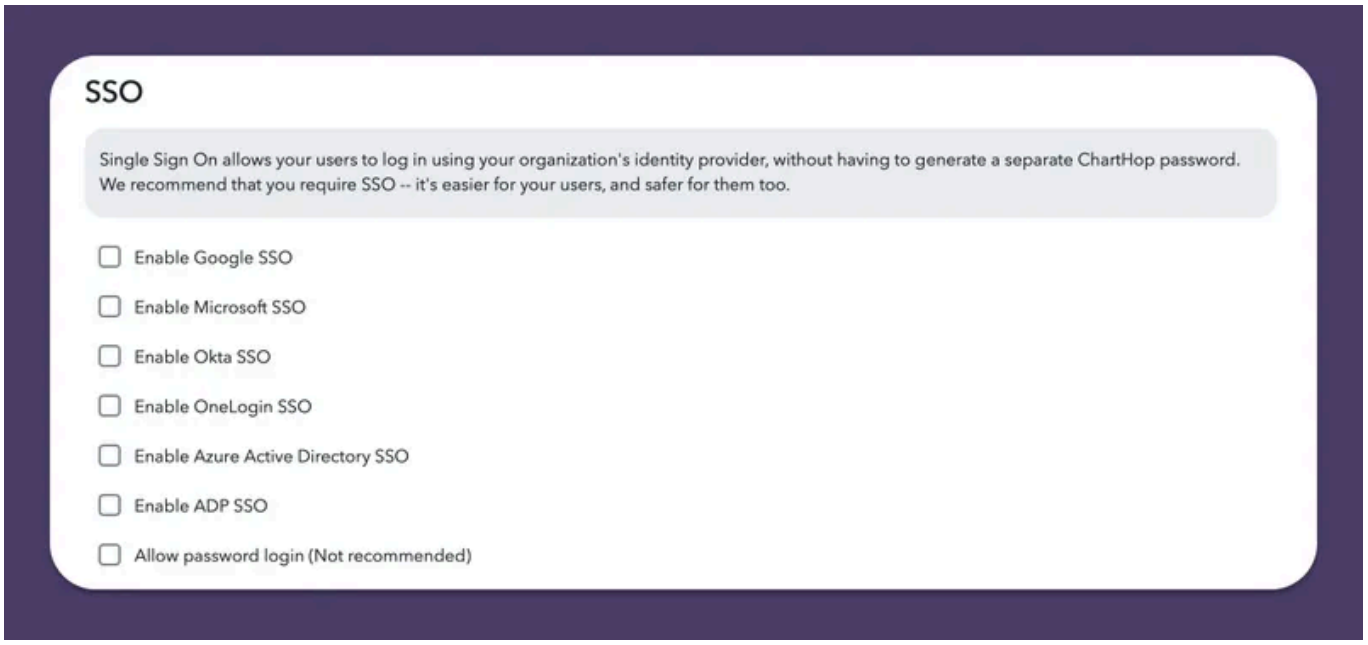
Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.3.2. Configuring SSO options

You can configure single sign-on (SSO) to allow your users to log in using your organization's identity provider without generating a separate ChartHop password. While it is optional, we recommend that you require SSO, as it's easier and safer for your users.

> ChartHop supports using one SAML-based identity provider at a time, as only one SSO metadata file can be associated with your ChartHop account. Because Google SSO does not use SAML 2.0, it is possible to enable Google SSO in addition to a SAML-based identity provider.
>
> If you want to use a SAML 2.0 identity provider that is not listed here, contact ChartHop support for assistance.

When you enable SSO, you can upload your SSO metadata file and customize your SSO login button image.



Supported Identity providers

ChartHop supports the following Identity providers:

SSO Option	Description
Google	Enables Google SSO login. Recommended if your organization uses G Suite. Can be used in conjunction with an additional SAML 2.0-based SSO configuration.
Microsoft	Enables Microsoft SSO login. Recommended if your organization uses Azure Active Directory.
Okta	Enables Okta SSO login. Recommended if your organization uses Okta.
OneLogin	Enables OneLogin SSO login. Recommended if your organization uses OneLogin.
Azure Active Directory	Enables Azure SSO login. Recommended if your organization uses Azure Active Directory.
ADP	Enables ADP SSO login when ChartHop is connected to ADP via the ADP Marketplace app.

Allowing password login

If you choose not to use SSO to manage user logins, you also have the option to use standard password logins.

> For security reasons it is generally *not recommended* to use both SSO and password login unless you have users from outside your organization who lack SSO to sign in.

You have the option to restrict the password login from specific IP addresses. If you would like to do so, add the IP addresses in the **Only allow password-based login from specific IPs (comma-separated)** input.

Note that this only applies to password login, so users with SSO will be able to login from any IP address.

5.11.3.2.1. Setting up Google SSO

You can configure your ChartHop organization with Google SSO. Google SSO requires employees in your ChartHop organization to have Gmail accounts.

Set up Google SSO

To get started, visit **Google's SSO Setup** instruction page.

Set up Google SSO in ChartHop

After completing Google's SSO setup instructions, you can enable the Google SSO option in ChartHop. In ChartHop, make sure your Organization is configured to accept Google SSO:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll to the **SSO** section on the page
4. Select the **Enable Google SSO** option.
5. Select **Save settings**.

ChartHop automatically configures your SSO by matching your company-issued Gmail account to the email assigned to you in your ChartHop user account when you attempt to sign on.

Test the new login with Google SSO to ChartHop

To test your Google SSO configuration with ChartHop:

1. Log out of ChartHop.
2. Visit: `https://app.charthop.com/{org-slug}/account/login` where `{org-slug}` is your ChartHop organization's unique slug.
3. Confirm that your Google sign-in displays on the login screen.

If you encounter any issues during or after testing your Google SSO setup, please reach out to **support@charthop.com**.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.11.3.2.2. Setting up OneLogin SSO

You can configure your ChartHop organization with OneLogin SSO.

Generate your XML metadata file

Before configuring the OneLogin SSO client to ChartHop, you will need to contact ChartHop support for your metadata XML file.

Setup SSO in OneLogin

You must configure your SAML 2.0 connection and receive your Issuer URL.

1. Under **Applications**, select **SAML Test Connector (Advanced)**.
2. Select the **SSO** tab.
3. Ensure that the **SAML Signature Algorithm** is set to **SHA-256**.
4. Download the **Issuer URL**.
5. Under **Configuration**, ensure that your settings are set to the following:
    - **RelayState -** https://app.charthop.com
    - **Audience (EntityID)** - ChartHop
    - **Recipient** - https://api.charthop.com/saml/sso/{org-slug}
    - **ACS (Consumer) URL Validation*** - https://api.charthop.com/saml/sso/{org-slug}
    - **Login URL** - https://api.charthop.com/saml/sso/{org-slug}
    - **SAML Signature Element** - Assertion

> Your ChartHop organization's slug can be found in ChartHop under the **Org nickname** section under the **General** tab in **Org settings**.

Setup SSO In ChartHop

After you configure your OneLogin settings, enable the SSO option in ChartHop and upload your metadata in ChartHop.

1. From the left sidebar, select **Access**.

2. From the sub-menu, select **Settings**.
3. Scroll to the **SSO** section on the page.
4. Toggle **Enable OneLogin SSO**.
5. Upload the Issuer URL file under **OneLogin IDP metadata file content**.
6. Select **Save settings**.

Test the new login with OneLogin SSO to ChartHop

To test your OneLogin SSO configuration with ChartHop:

1. Log out of ChartHop.
2. Visit `https://app.charthop.com/{org-slug}/account/login` where `{org-slug}` is your ChartHop organization's unique slug.
3. Confirm that your OneLogin sign-in displays on the login screen.

If you encounter any issues during or after testing your SSO setup, please reach out to **support@charthop.com**.

Packages: Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.3.2.3. Setting up Microsoft and Azure Active Directory SSO

You can configure your ChartHop organization with Microsoft Azure Active Directory SSO.

Generate your XML metadata file

Before configuring the Microsoft/Azure SSO client to ChartHop, you will need to provide your Federation metadata XML file which can be downloaded **here.**

Set up SSO in Azure

To set up SSO for Active Directory in ChartHop, you must configure several settings in your Azure account:

1. In the **Azure portal**, on the left navigation panel, select **Azure Active Directory**.
2. Select **Enterprise Applications**.
3. Select **+ New application**.
4. Name the application `ChartHop SSO` and select **Create**.
5. Under **Getting Started,** select Option 2, **Set up Single Sign-On**.
6. Under **Manage**, select **Single Sign-On**.
7. Set the following in **Basic SAML Configuration**:
    - **Identifier (Entity ID)** - ChartHop
    - **Reply URL** - https://api.charthop.com/saml/sso/{org-slug}
    - **Sign on URL** - Leave this field blank.
    - **Relay State** - https://app.charthop.com
8. Under **Manage**, select **Users and Groups**.
9. Select **Granted to use this application**.

Set up Azure SSO in ChartHop

After you have configured your Azure portal settings, enable the SSO option and upload your generated metadata file to ChartHop:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll to the **SSO** section on the page.
4. Toggle both **Enable Azure Active Directory SSO** and **Enable Microsoft SSO**.
5. Upload your **Federation Metadata XML** file under **Azure Active Directory IDP metadata file content**.
6. Select **Save Settings**.

Test the new login with Azure Active Directory to ChartHop

To test your Azure Active Directory and Microsoft SSO configurations with ChartHop:

1. Log out of ChartHop.
2. Visit `https://app.charthop.com/{org-slug}/account/login` where `{org-slug}` is your ChartHop organization's unique slug.
3. Confirm that your Microsoft sign-in displays on the login screen.

> If you encounter any issues during or after testing your SSO setup, please reach out to **support@charthop.com**.

Issues with alternative user emails

In some cases, such as during an acquisition, you may have users in your company with alternative email domains than the ones used by the main company. In general, a user's Active Directory email should be the same as the one used in their ChartHop accounts. Having different email domains may result in SSO login issues.

> Microsoft suggests using **a workaround** in cases where users want to keep an original email domain.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.11.3.2.4. Setting up Okta SSO

You can configure your ChartHop organization with Okta SSO.

Generate the Okta metadata file

To set up Okta SSO with ChartHop you will need to configure the Okta ChartHop app and download your Okta metadata file:

1. Go to Okta's **ChartHop integration page**.
2. Select **+ Add Integration**.
3. Log in with your Okta account.
4. Select the **Sign On** tab for the ChartHop SAML app. Select **Edit**.
5. Enter your ChartHop organization's {org-slug} in the Organization ID field.
6. Select **Save**.
7. Select **View Setup Instructions**.
8. Scroll down to the **Optional** section, and save the metadata XML content as a text file named “okta.xml”.
9. Mark the task as DONE when complete.

> Your organization's slug can be found in the **Org nickname** field under the **General** tab in **Org settings.**

Upload Okta metadata to ChartHop

Once you've set up your metadata configuration in Okta, you can return to ChartHop to enable Okta SSO and upload your metadata. Follow these steps to accomplish this:

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll to the **SSO** section on the page.
4. Toggle **Enable Okta SSO**.
5. Upload your Okta metadata file.

6. **Confirm** your metadata file content is present.
7. Select **Save settings**.

Test the new login with Okta SSO to ChartHop

After uploading your metadata file content to your Okta profile in ChartHop, test the integration by following these steps:

1. Log out of ChartHop.
2. Visit: `https://app.charthop.com/{org-slug}/account/login` where `{org-slug}` is your ChartHop organization's unique slug.
3. Confirm that your Okta sign-in displays on the login screen.

> If you encounter any issues during or after testing your SSO setup, please reach out to **support@charthop.com**.

Automatically update Okta profiles and groups

You can automatically update Okta profiles and groups using the Okta Integration. **Learn more**

> **Packages:** Basic | **Headcount Planning** | **Compensation Reviews** | **Performance** | **Engagement**

5.11.3.2.5. Setting up SAML

You can configure your ChartHop organization with SAML V2.

Generate your XML metadata file

Before configuring SAML in ChartHop, you will need to generate an XML metadata file from your identity provider (IdP). This is done on your end — ChartHop support does not generate this file for you. Refer to your IdP's documentation for instructions on how to export or download your SAML metadata XML.

Setup SSO In ChartHop

After you have your XML metadata file, enable the SAML option in ChartHop and upload your metadata.

1. From the left sidebar, select **Access**.
2. From the sub-menu, select **Settings**.
3. Scroll to the **SSO** section on the page.
4. Toggle **Enable SAML v2 SSO**.
5. Upload the XML.
6. Select **Save settings**.

Test the new login with SAML SSO to ChartHop

To test your SAML SSO configuration with ChartHop:

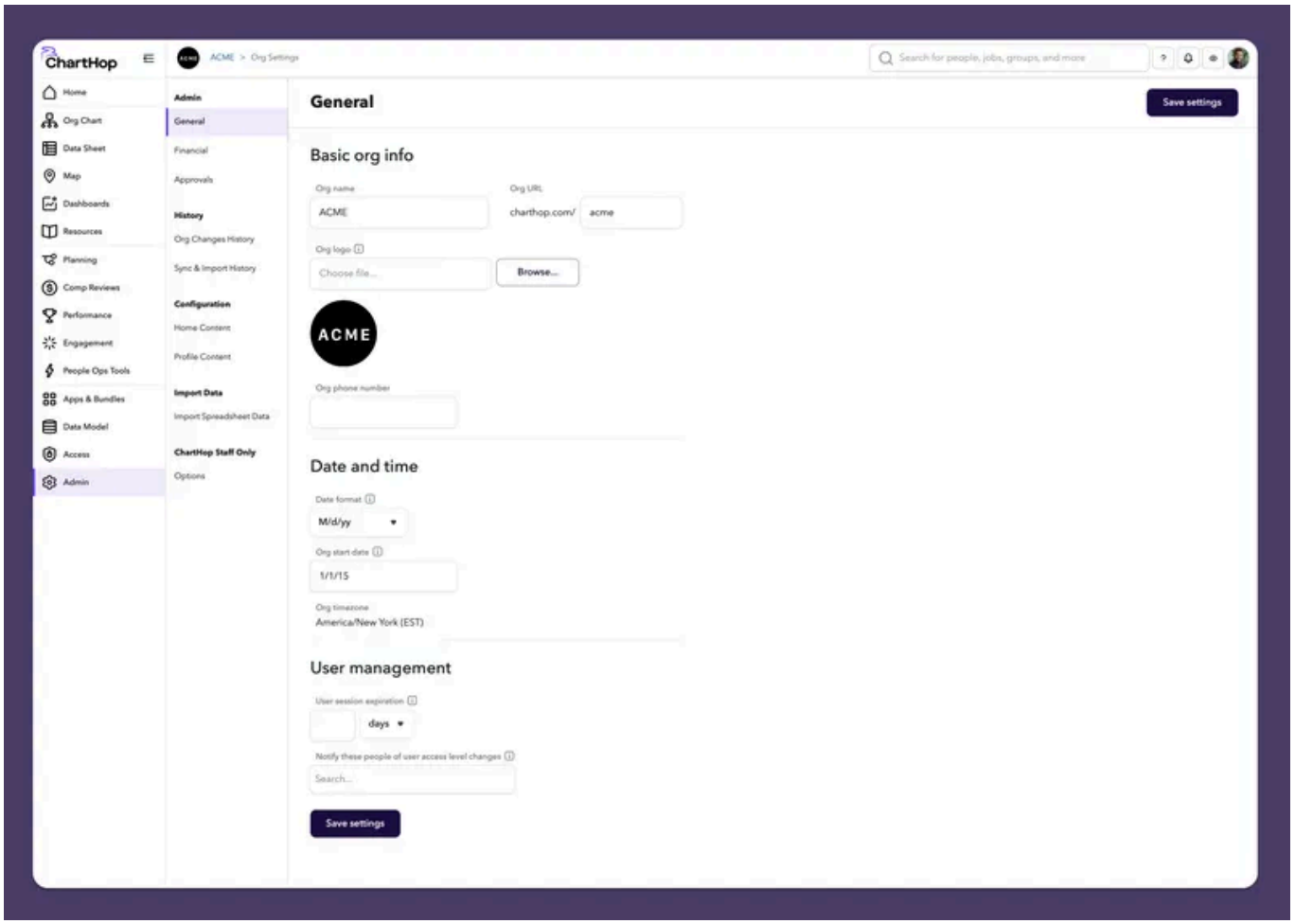
1. Log out of ChartHop.
2. Visit `https://app.charthop.com/{org-slug}/account/login` where `{org-slug}` is your ChartHop organization's unique slug.
3. Confirm that your SAML sign-in displays on the login screen.

> **Packages**: Basic | Headcount PlanningCompensation ReviewsPerformanceEngagement

5.12. Admin settings

5.12.1. Configuring general settings

In the **General** tab, you can configure information about your organization, including basic information, date formats, and user management defaults.



To configure your organization's general settings:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **General** if not already pre-selected.
3. Update your company information. See below for details
4. Select **Save** to save your changes.

Basic org info

- **Org name** - The name of your organization. It will appear at the top of the account at all times.
- **Org URL** - The subdomain of your organization, delineated by dashes. It will be used in your charthop url.
- **Org phone number** - The main phone number for your organization.

Branding

These colors and logos will be used throughout the app to make it feel more algined with your organization. It will be used on:

1. Home page
2. ChartHop mobile app
3. Profile page *(with* **Refreshed Profile Page** *turned on)*

Branding recommendations

- **Primary brand color** — This will be used as a background on the home page and mobile app. We suggest selecting a brand color that is will look good as a compliment to your logo. Often this is a dark color or off white.
- **Secondary brand color** — This color is currently not used by default, but more options of how to use this color will come in the future.
- **Square logo** — This logo will appear in the top right corner of your ChartHop account and many other places. We suggest you add a logo where a color other than white takes up the entire square. Circular logos or logos with clear backgrounds are not recommend. The recommended size is 200×200 or 100×100 pixels.

- **Horizontal logo** — This logo will primarily be used set against your primary brand color so make sure they work together well. We recommend a logo with a transparent background. For example, the white ChartHop logo set against dark purple. Any logo larger than 100 pixels tall should look great.

Tips on finding your company's branding

1. Check your intranet, internal resources or your marketing team.
    1. Ask for *"A brand background color and a logo that would look good on top of that color. For example, a dark purple background and a white logo."*
2. Check your company website for a brand guidelines page.
3. Check your company LinkedIn or social media page for square logos. Right-click and "Save image as" then upload that image.
4. Search for your company on **Brandfetch**.

Date and time

- **Date format** - The date format that is used throughout your organization.
- **Org start date** - The official date on which your organization was established.

Notifications

- **Where should the notifications for all employees be sent by default?** - Sets the default notification settings for your organization. Do you want notifications to go to **Slack** or **Microsoft Teams** by default or to email?

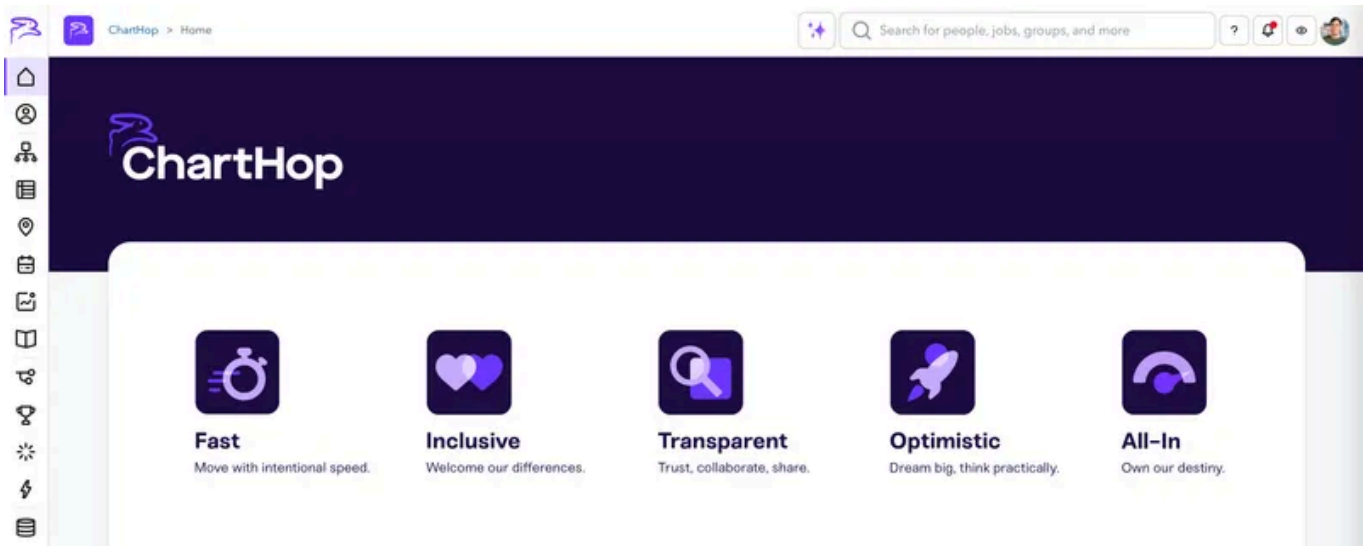
> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

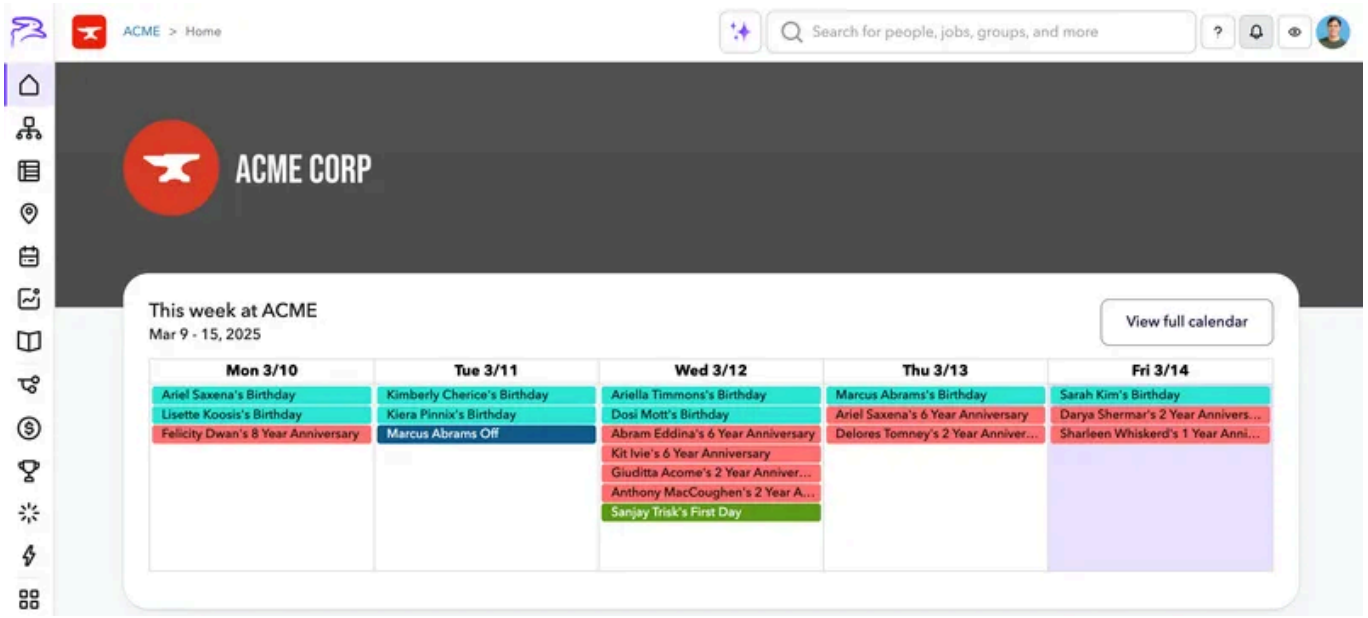
5.12.2. Configuring the Home page

Header

The header of the home page features your brand colors and logo that you can set in [general settings.]

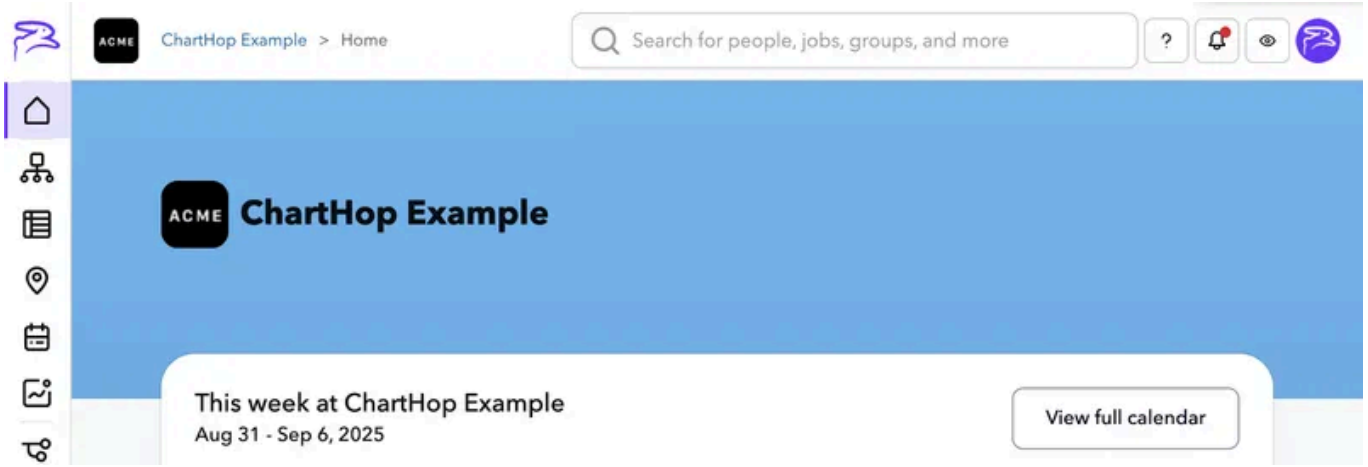
Your **primary brand color** and **horizontal logo** will be used in the header.



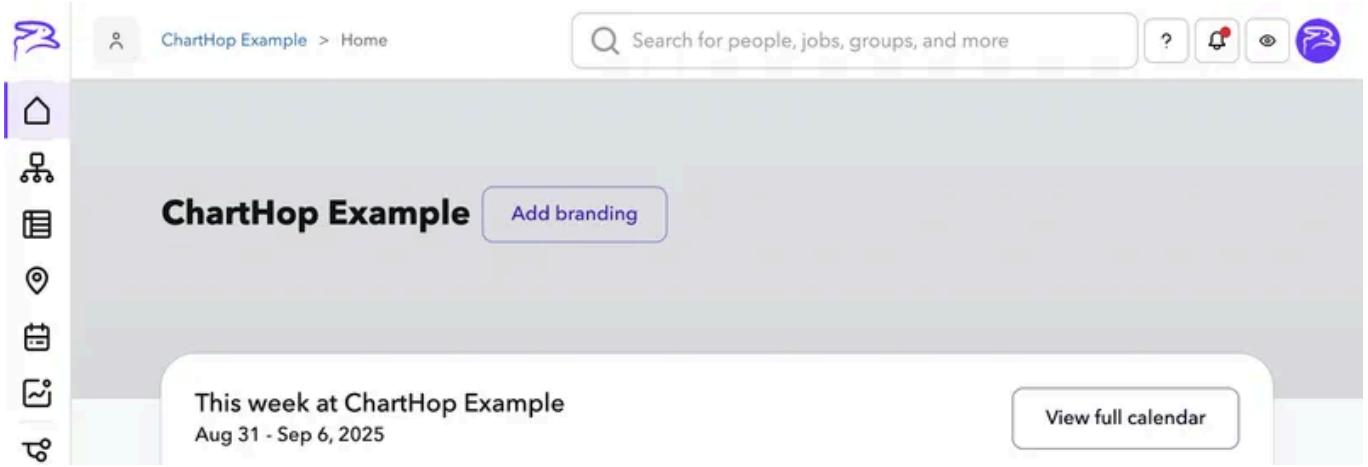


Depending on what information you add your header will adjust:

No **Horizontal logo** - Your **square logo** and org name will be displayed



No **colors or logos** - A nice simple grey background



Widgets

You add, remove and customize the widgets that display for your organization on the Home page.

There are are 5 widgets that can be added or removed from the home page:

- **Calendar Week View**
- **Welcome Message**
- **People Moves**
- **Open Jobs**
- **Milestones**

Home Page Content

Welcome message

Show a custom welcome message on the home screen

Custom welcome message

Welcome to Acme **{{name}}**! You are part of the {{department}} department and you





Home page widgets

Which widgets should be shown on the home page?

People moves Open Jobs Milestones Weekly Calendar

People moves

Changes to display

Hires

Departures

Moves

Manager changes

Title changes

Time window

10 days in the future

-5 days in the past

Open Jobs

Only display jobs that match a person's location

Milestones

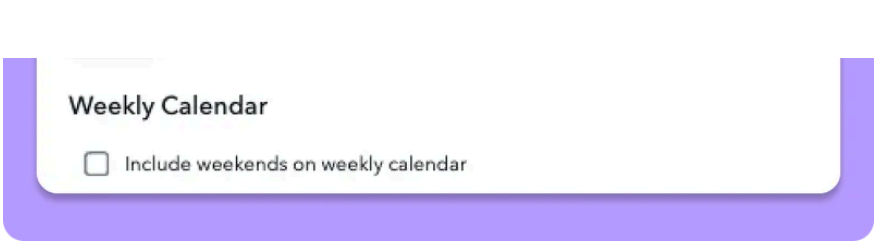
Events to display

Birthdays Anniversaries

Time window

3 days in the future

7 days in the past



Welcome Message

The welcome message is a completely customizable way to share messages with your employees as they log into ChartHop. Some of our favorite use cases are:

- Showcasing your company values
- Announcing upcoming events or people ops activities
- Communicating where people should reach out with questions

You are able to add variables to the text based on who the person is.

Customization Example:

If you had an HRBP field, you could say: "Reach out to your HRBP: `{{hrbp}}` " and the HRBP's name would be inserted for each person.

The welcome message widget is hidden if there is no content in it.

People Moves

Changes to display

You can customize, which types of organizational changes are displayed in the people moves list. The changes will only be displayed after their "Announce Date."

- **Hires** - New hires are displayed on their start dates.
- **Departures** - People who are departing are displayed on their end date.
- **Moves** - Transfers of people from one job to another job. Displayed on the date of the start int he new job.
- **Manager changes** - Displayed on the date that the manager changes.
- **Title change** - Displayed on the date that the title changes.

Time window

Select the time range for the changes that the the people moves should be displayed on.

Open Jobs

If you are displaying the open jobs, you have the option to either:

1. Display all jobs to all people (Default - Unchecked)
2. Display only jobs that align with the person's **Location** (Checked)

Milestones

Select which types of dates should be displayed on the calender widget:

- **Anniversaries**
  - Will display the number of years that someone has been at a company on the anniversary of their start date
- **Birthdays**
  - Employees can **set their birthday preferences on their profile**. Their birth year and age is never displayed.

Export Milestones

Clicking the Export button from Milestones will allow you to sync your selected milestones to Excel, Google Sheets, and Outlook or Google calendars.

Time window

Select the time range for the changes that the the people moves should be displayed on.

Calendar Week View

The calendars you display will be the calendars enabled for the organization in Core Views. You can customize your calendar settings **here**. You can choose whether you want your weekly view to include weekends or just weekdays.

The weekly view defaults to information for the entire organization.

Default Calendars you can choose to display:

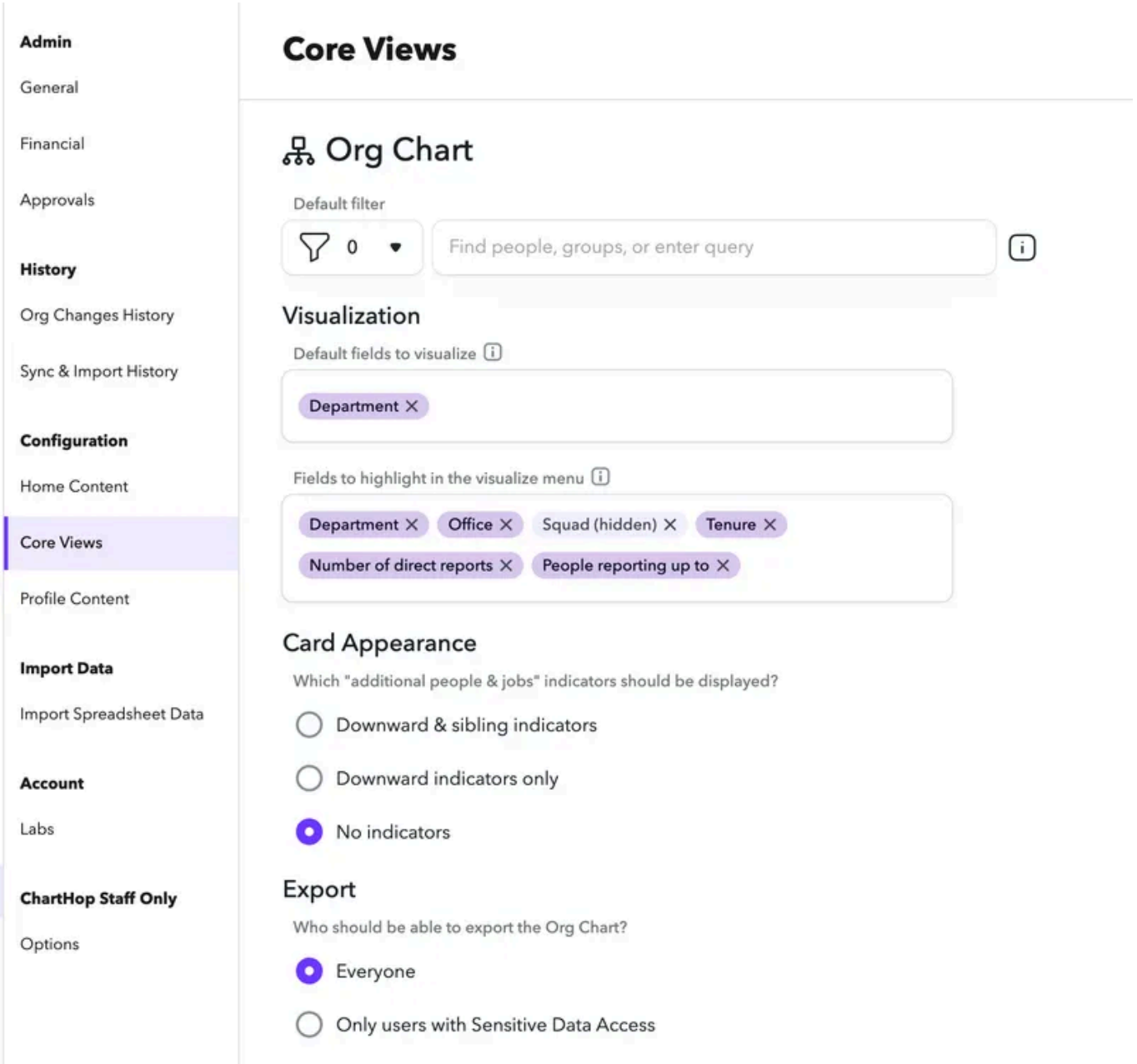
- **Time Off** -If you use **ChartHop's** time off or your time off data is synced in from your HRIS, then it will be displayed if you select this calendar

- **Hires** - New hires are displayed on their start dates
- **Departures** - People who are departing are displayed on their end date
- **Anniversaries -**Will display the number of years that someone has been at a company on the anniversary of their start date
- **Birthdays** - Employees can **set their birthday preferences on their profile**. Their birth year and age is never displayed.
- **Tasks** - Employees will see tasks assigned to themselves on the due dates if the task has one.
- **Performance Reviews** - If you have **selected a cycles dates** to display on the calendar.
- **Engagement Surveys** - If you have **selected a cycles dates** to display on the calendar.
- **Compensation Reviews**- Once they are launched, visible if an employee is participating in the cycle.
-

5.12.3. Configuring Org Chart Defaults

You customize several options about how your org chart appears and what people can do with it.

To configure the Org Chart Options, navigate to **Admin** > **Configuration / Core Views.** Only users with the built in roles of **Owner** and **Technical owner** have access to this page.

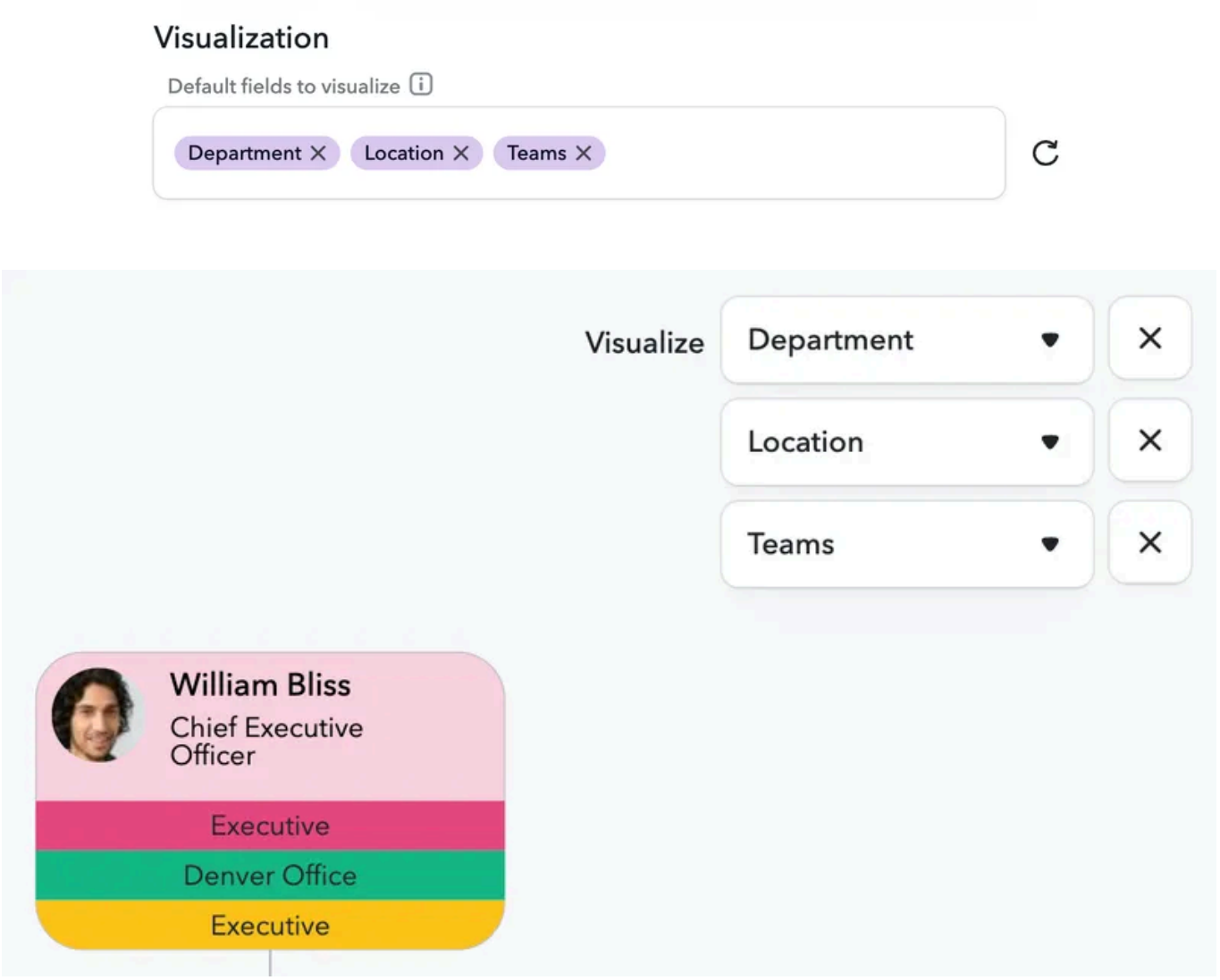


Default filter — Add a filter that displays for every person when they view the org chart.

- Test the filter on the org chart view then copy it into the setting.
- For example, you could add `employment:full` to only show full time employees.

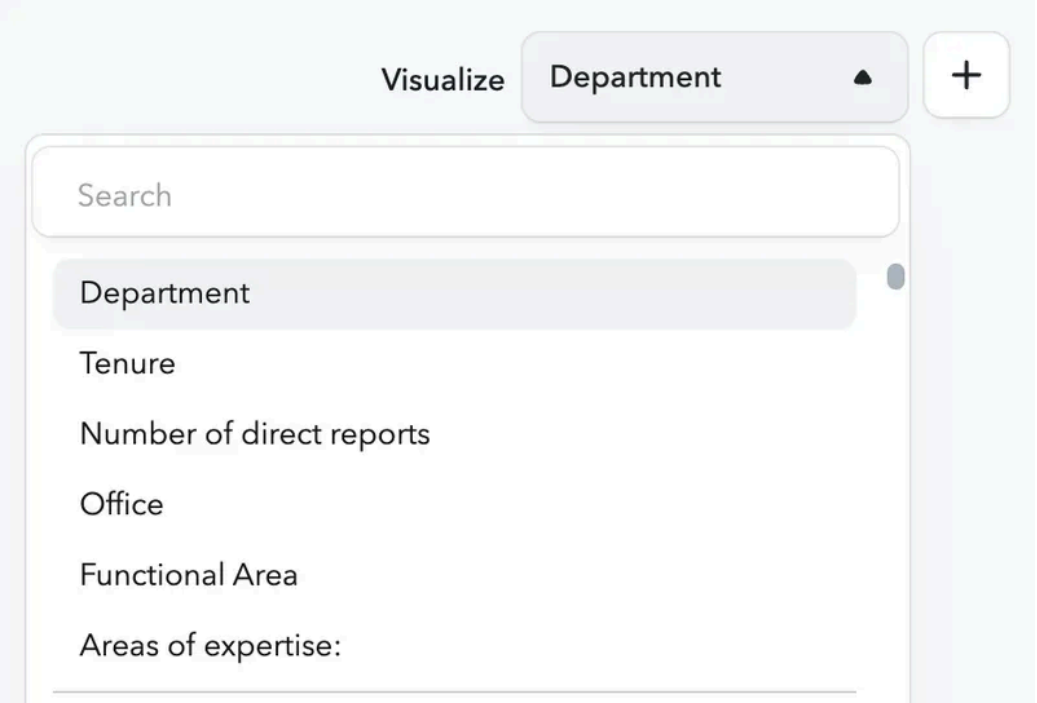
Visualization

Default fields to visualize — These fields are highlighted by default in the visualize part of the org chart. Add up to 3 fields.



Example of default visualization

Fields to highlight in the visualize menu — Select which fields you would like to display at the top of the visualize menu. These are fields that you'd like to empower your team with quick access to. For example, if you have a custom `Skills` field, that you want people to use, you can add it here. These options will be the same for all users unless they do not have access to the field at all.

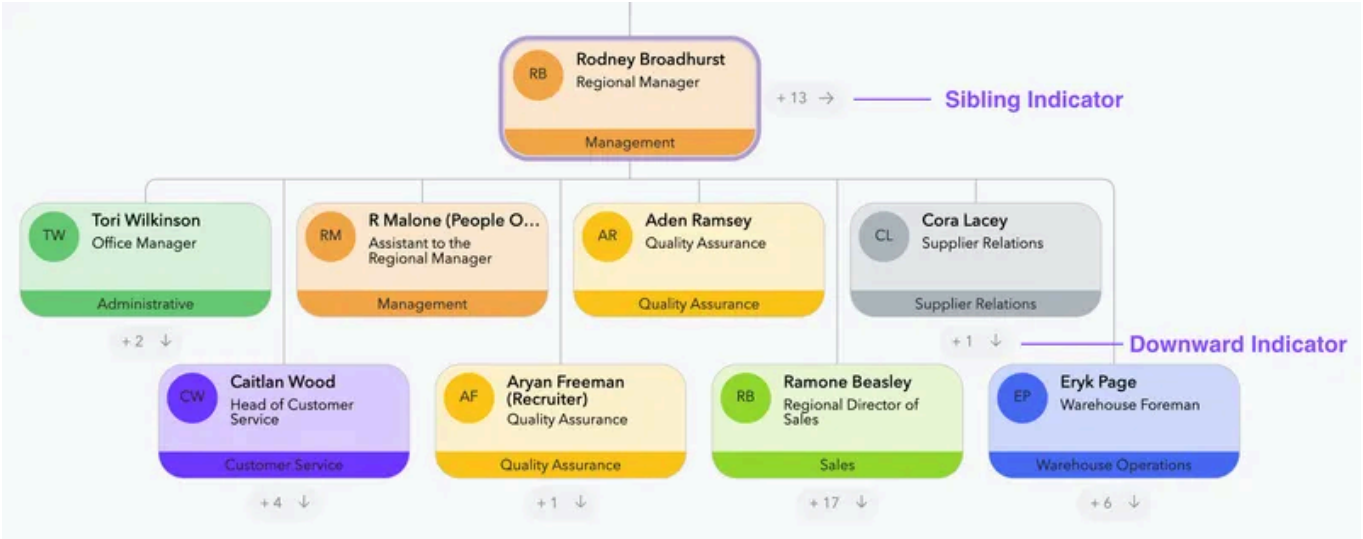


Visualize Menu

Card Appearance

Which "additional people & jobs" indicators should be displayed? — In the image below you can see both Sibling and Downward indicators.

- **Sibling Indicator** — shows that the number of people that are on the same org chart level as this person. Clicking it will display "expand" the view and show those people.
- **Downward Indicator** — Indicates that the number of people that this person has under them. Clicking this will expand the view and show those people.



Sibling & Downward Indicators

Export

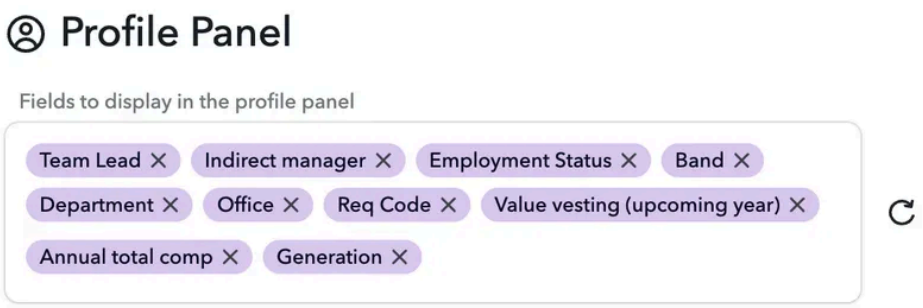
Who should be able to export the Org Chart? — Control who has the ability to **Export your Org Chart to slides**.

Profile Panel

The profile panel pops up when you click on a person in the org chart, map and other views around ChartHop.

Fields to display in the profile panel — You can customize which fields are displayed on this panel.

- The fields will display in the order that they were selected
- Certain built in fields have overrides for the names in the the profile panel such as `manager` → "Reports to".



Profile Panel Field Selection



Ibby Andrews

Human Resources

Edit job | View Profile

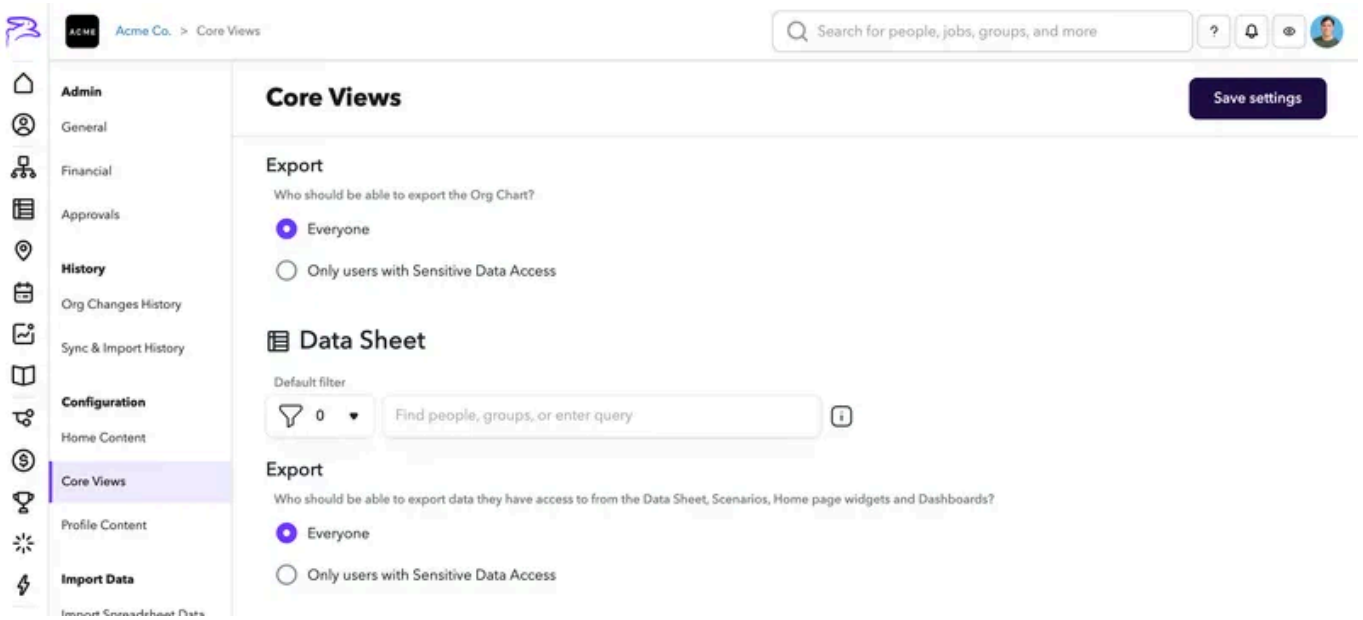
DETAILS | JOB HISTORY

Reports To	John Wetzel (People Ops Manager)
Employment Status	Full Time
Department	Human Reso…
Office	Kuala Lumpur
Vesting	$0
Total	R$444,400,000
Generation	Gen Z

5.12.4. Configuring Data Sheet Defaults

You customize several options about how your org chart appears and what people can do with it.

To configure the Org Chart Options, navigate to **Admin** > **Configuration / Core Views.** Only users with the built in roles of **Owner** and **Technical owner** have access to this page.



Default filter — Add a filter that displays for every person when they view the data sheet.

- Test the filter on the data sheet view then copy it into the setting.
- For example, you could add `employment:full` to only show full time employees.

Export

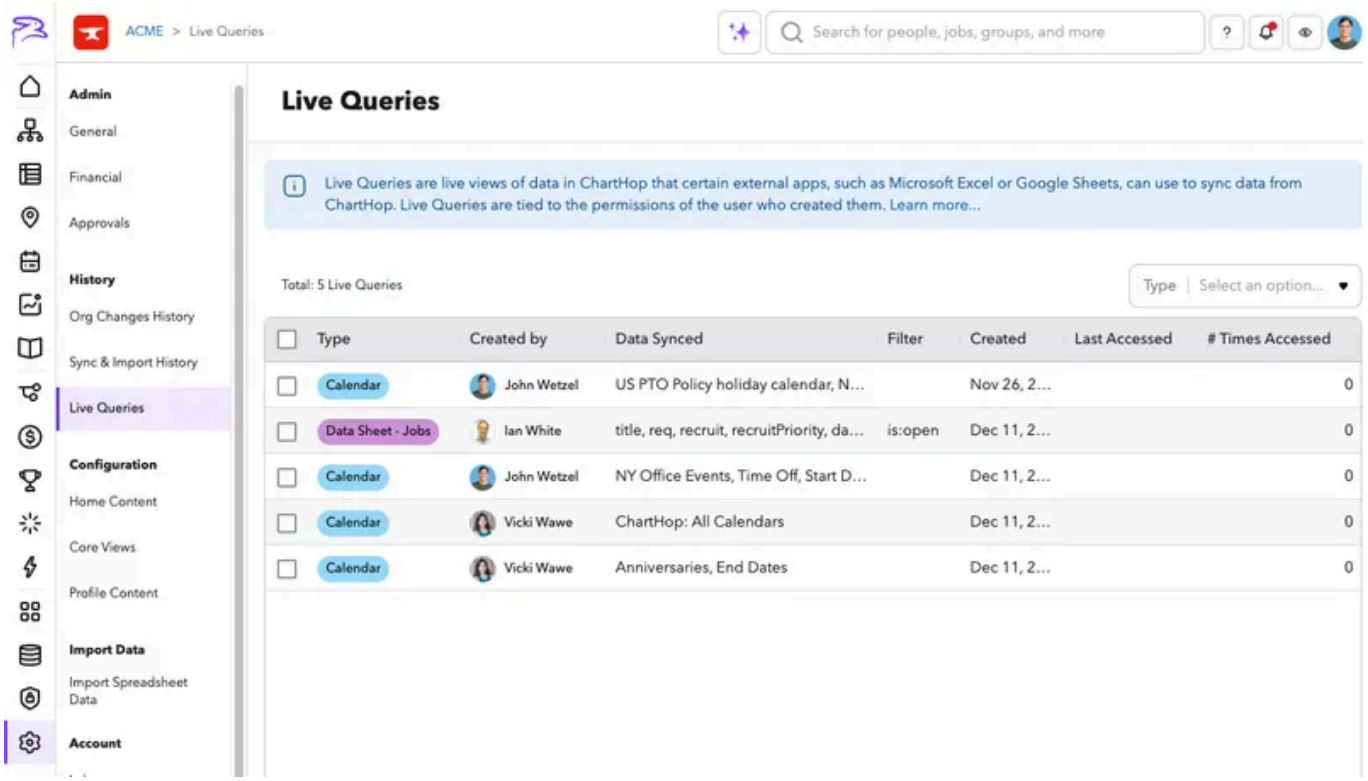
Who should be able to export the Data Sheet? — Control who has the ability to **Exporting data from the Data Sheet**. People will only ever be able to export data that they already have access to.

5.12.5. Managing data sheet and calendar syncs

The Live Queries page allows ChartHop Owners to view and revoke access to any external data syncs created at you organization. Those include:

[Syncing a Data sheet view to Google Sheets or Excel]

[Syncing ChartHop calendars to Google or Outlook calendars]



Live queries page overview

- **Type -** Calendar, Data Sheet - Jobs or Data Sheet - Persons
- **Created by -** Who created the sync (this users permissions always apply to the synced data)
- **Data Synced** - What data they are syncing
    - Calendar - lists the calendars
    - Data sheet - lists the field codes
- **Filter -** if a filter was applied (Data sheet only)
- **Created -** When it was created.

- **Last Accessed** - Date when the data was last pulled
- **# Times Access -** The number of times that the data has been updated or synced.

To delete a sync and revoke access

1. Navigate to **Setting** > **Live Queries**
2. Select the sync that you would like to delete
3. Press **Delete** from the bulk actions menu.
4. Confirm the deletion.

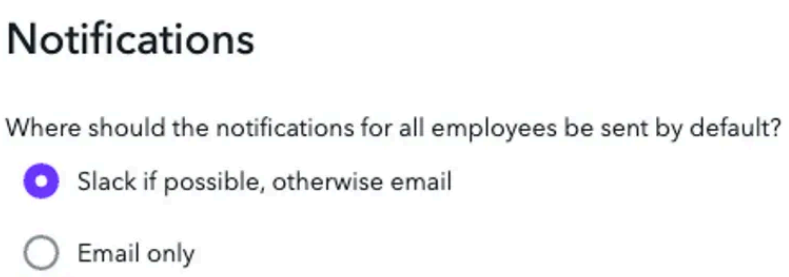
5.12.6. Notification preferences

ChartHop sends messages & notifications for people ops workflows like **Performance reviews**, **Engagement surveys** and **Automated Actions**.

If you do *not* have the **Slack App** installed, then the notifications will always be sent to email.

If you have the **Slack App** installed, then you have the choice to set the organization's default notification preference as one of two options:

- **Slack if possible, otherwise email** — *In this option, ChartHop will send the message to Slack if the person's slack ID is matched to ChartHop. This happens automatically when you connect the Slack app.*
- **Email only** — *Regardless of if you have the Slack App installed. This will send to the notifications via email.*

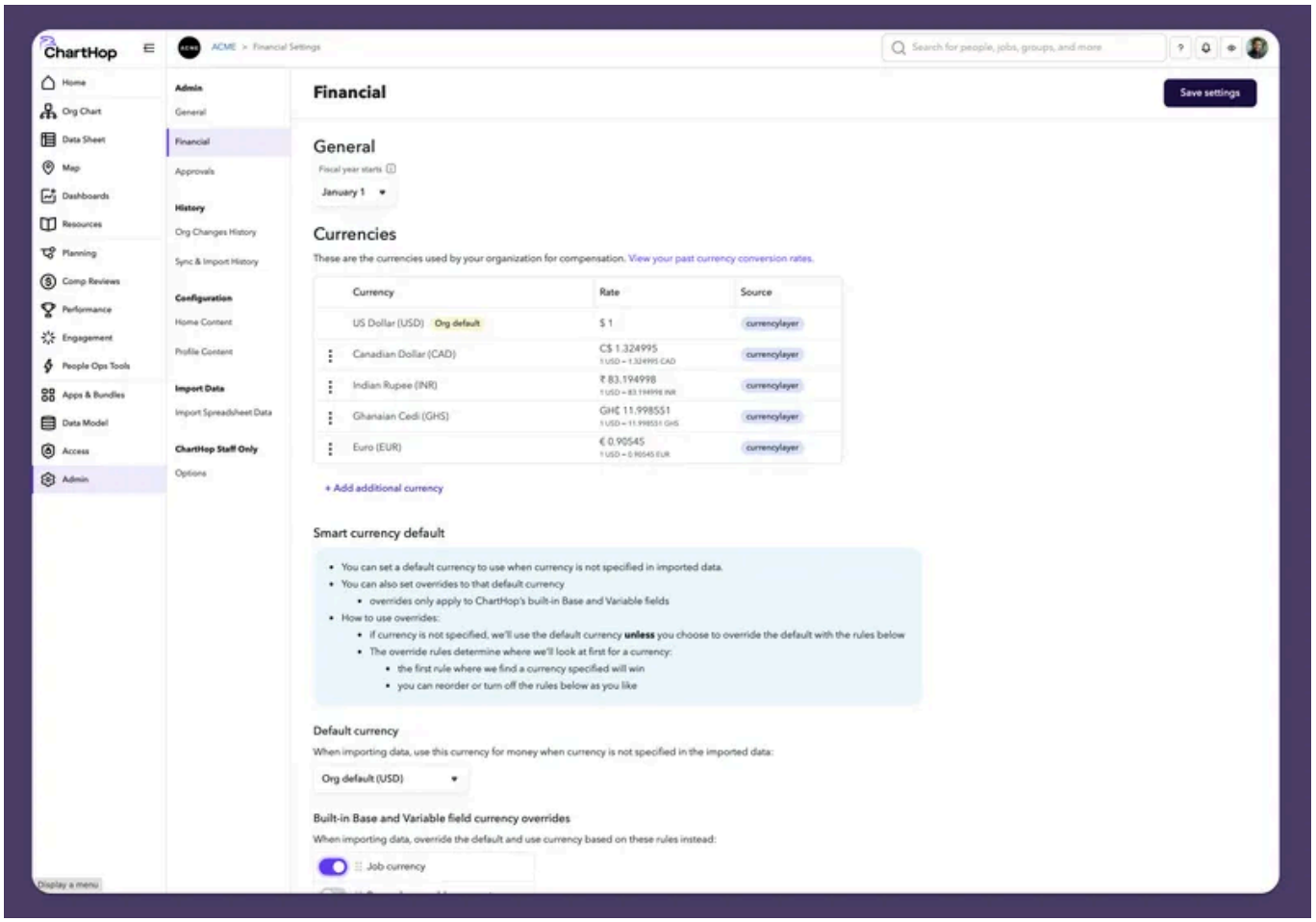


This default can also be overwritten on a per workflow basis.

For example, if you want your default to be **Slack if possible, otherwise email** but you want to always send birthday notifications to Slack using an **Automated Actions**; you have that option within the action step configuration.

5.12.7. Configuring financial settings

In the **General** tab, you can configure information about financial prefrences including fiscal year, currencies, cost multipliers, and stock valuations.



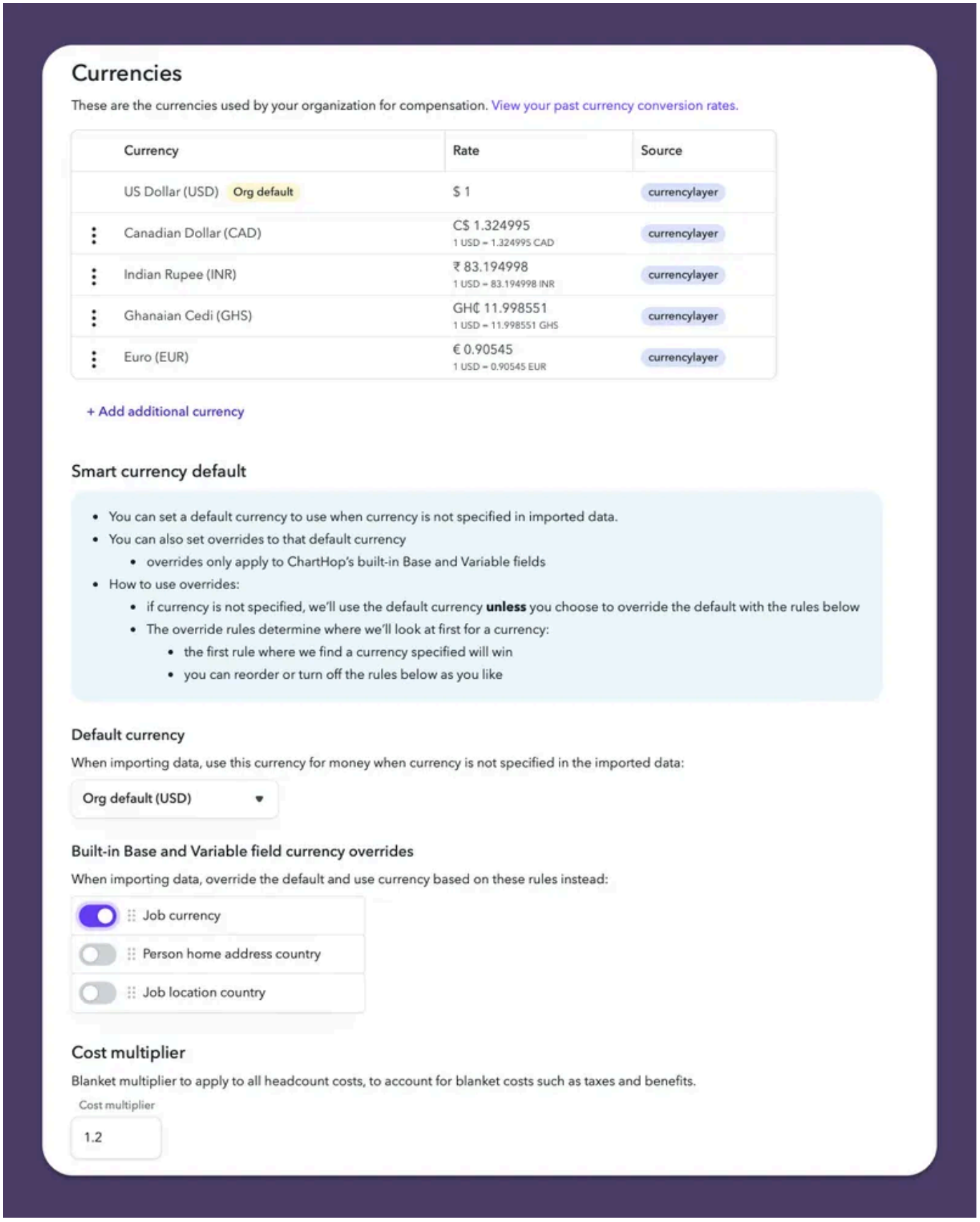
To configure your organization's general settings:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. Enter your company financial preferences in the following sections:
    - In the **General** section:
        - **Fiscal year starts** - The month on which your organization's fiscal year begins.
    - In the **Currencies** section:
        - **Add additional currency** - Select additional currencies as your organization needs them

        - **Default currency** - The default currency when currency is not specified in imported data
        - **Built-in Base and Variable field currency overrides** - Options to override the currency default for specific conditions when importing data
        - **Cost multiplier** - custom multiplier for approximating true headcount costs across the organization
    - In the **Stock valuations** section:
        - **Equity grant types** - The types of grants your organization supports and options to rename them
        - **Valuation History** - Manage and configure your stock options for your organization's employees, determine the strike price for option grants, and establish amounts to be allocated for fundraising events.
4. Select **Save Settings** to save your changes.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.1. Managing currencies and costs



The **Currencies & costs** page lets you manage the currencies used by your organization, as well as set up currency defaults and cost multipliers. The features within this page help make managing currencies and costs a transparent and visible process.

> Currency rates are populated using currencylayer. **currencylayer** is an API service that provides updated and accurate currency data for use with ChartHop. Conversion rates are updated on the first of each month.

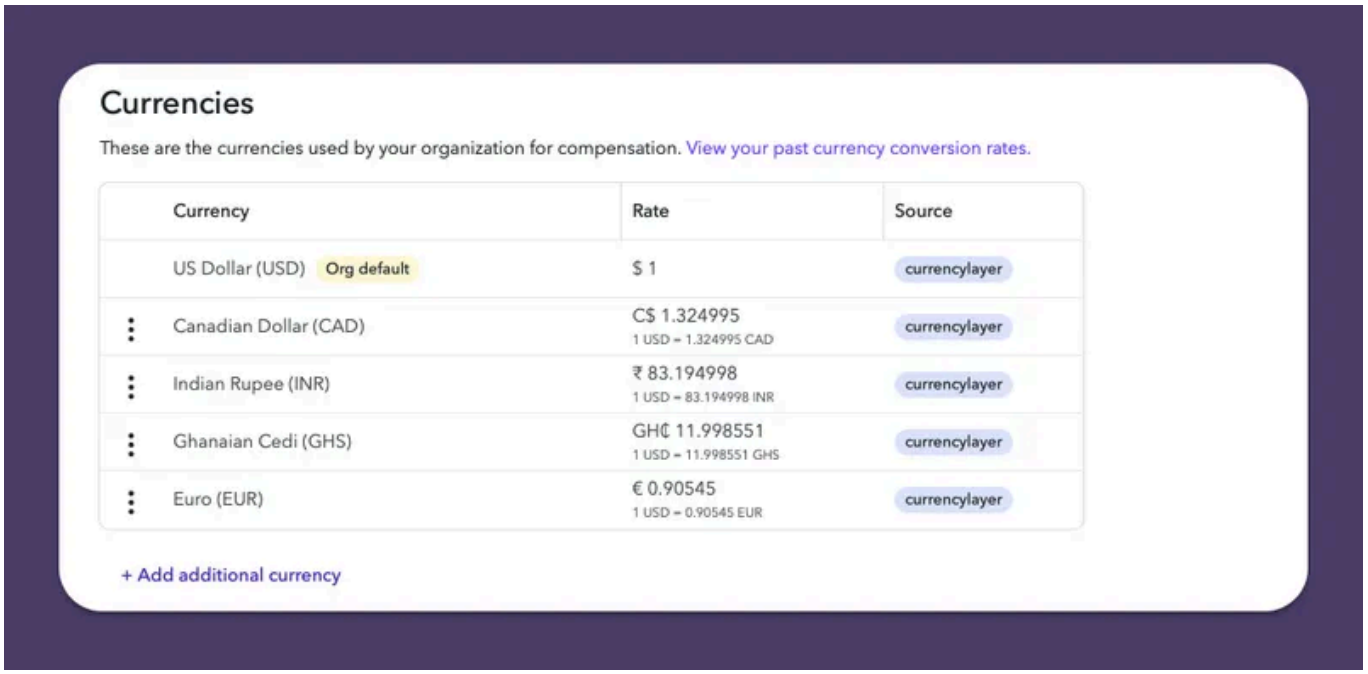
- In the **Currencies** section, you can add and delete multiple currencies, set a default currency, view the currency rates being used (as well as their source), view past currency rates, and set custom currency rates for your organization.
- In the **Smart currency defaults** section, you can set smart defaults for how currency is applied to monetary values without a defined currency.
- In the **Costs** section, you can add a cost multiplier that is applied to all your headcount costs.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.1.1. Add and delete currencies

In the **Currencies** section, you can see a table of all the currencies used by your organization for compensation purposes, including the current rates and the rate source.

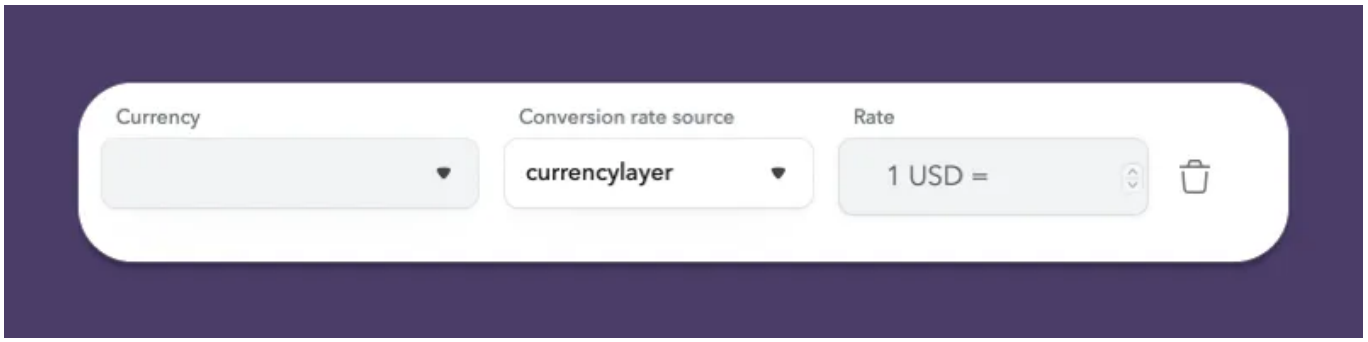
> Currency rates are populated using currencylayer. currencylayer is an API service that provides updated and accurate currency data for use with ChartHop. Conversion rates are updated on the first of each month.



> The rate comparisons that display underneath a rate are compared against the default currency for the organization.

Add a currency

You can add additional currencies to the table. This is helpful for when you are adding new employees to your ChartHop organization and those new employees must be paid using an unlisted currency.



To add an additional currency to the table:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. In the **Currencies** section, select **+ Add additional currency**.
4. In the fields that display:
    - **Currency** - Select a currency from the dropdown list. The currencies that display in the list are populated from currencylayer.
    - **Conversion rate source** - Select the source for the currency rate from the following:
        - **currencylayer** - Automatically populates currency rates from currencylayer. This option is selected by default.
        - **Custom** - Allows you to enter a custom currency rate. Learn more.
5. Select **Save** at the bottom of the **Currencies & costs** tab to save your changes. The additional currency is added to the list.

> You can add multiple currencies at once by selecting **+ Add additional currency** multiple times. To delete a new currency row, select the trash can icon.

Delete a currency

To delete a currency from the currencies list:

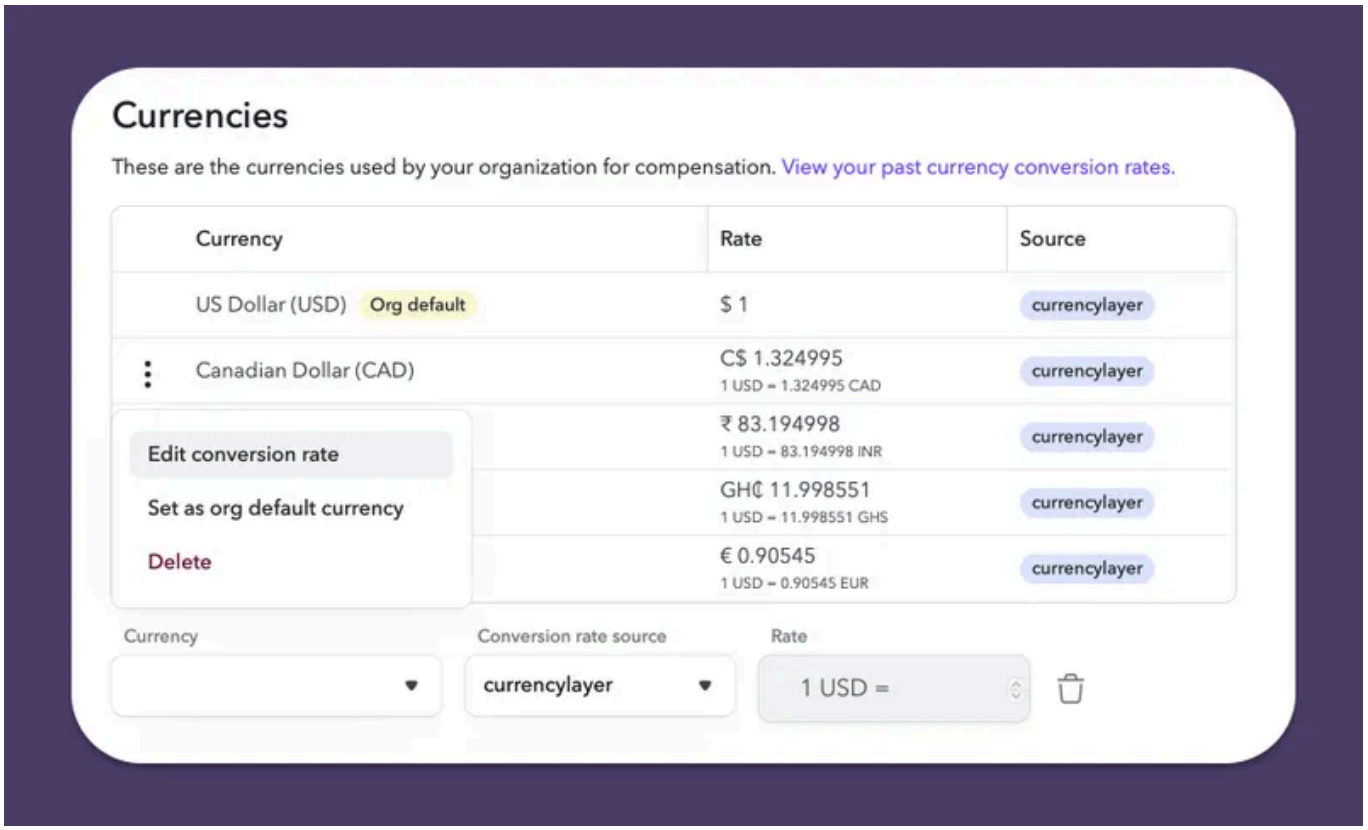
1. From the left sidebar, select the Settings menu (gear icon) and select **Org settings**.
2. Select the **Currencies & costs** tab.
3. In the **Currencies** section, select the action menu at the left of the row for the currency you want to delete.

4. Select **Delete**.
5. Select **Save** at the bottom of the **Currencies & costs** tab to save your changes.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.1.2. Set a default currency

You can change the default currency for your organization (by default, US Dollar (USD) is configured as the **Org default**).



To change the default currency for your ChartHop organization:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. In the **Currencies** section, select the action menu at the left of the row for the currency you want to set as default.
4. Select **Set as org default currency**.
5. Select **Save** at the bottom of the **Currencies & costs** tab to save your changes. Rate comparisons are updated to be based off of your default currency.

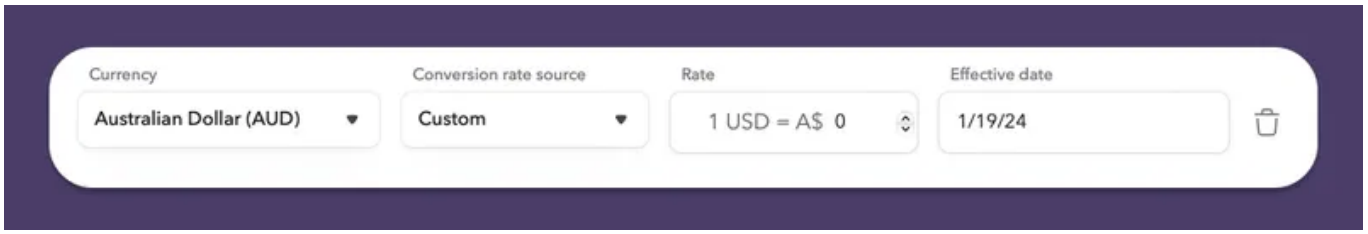
> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.1.3. Set custom currency rates

You can define custom currency rates for use in your ChartHop organization by adding new custom currency rates or by editing conversion rates for existing currencies in your list.

Add a custom currency rate

You can add a new custom currency rate to your currencies list.



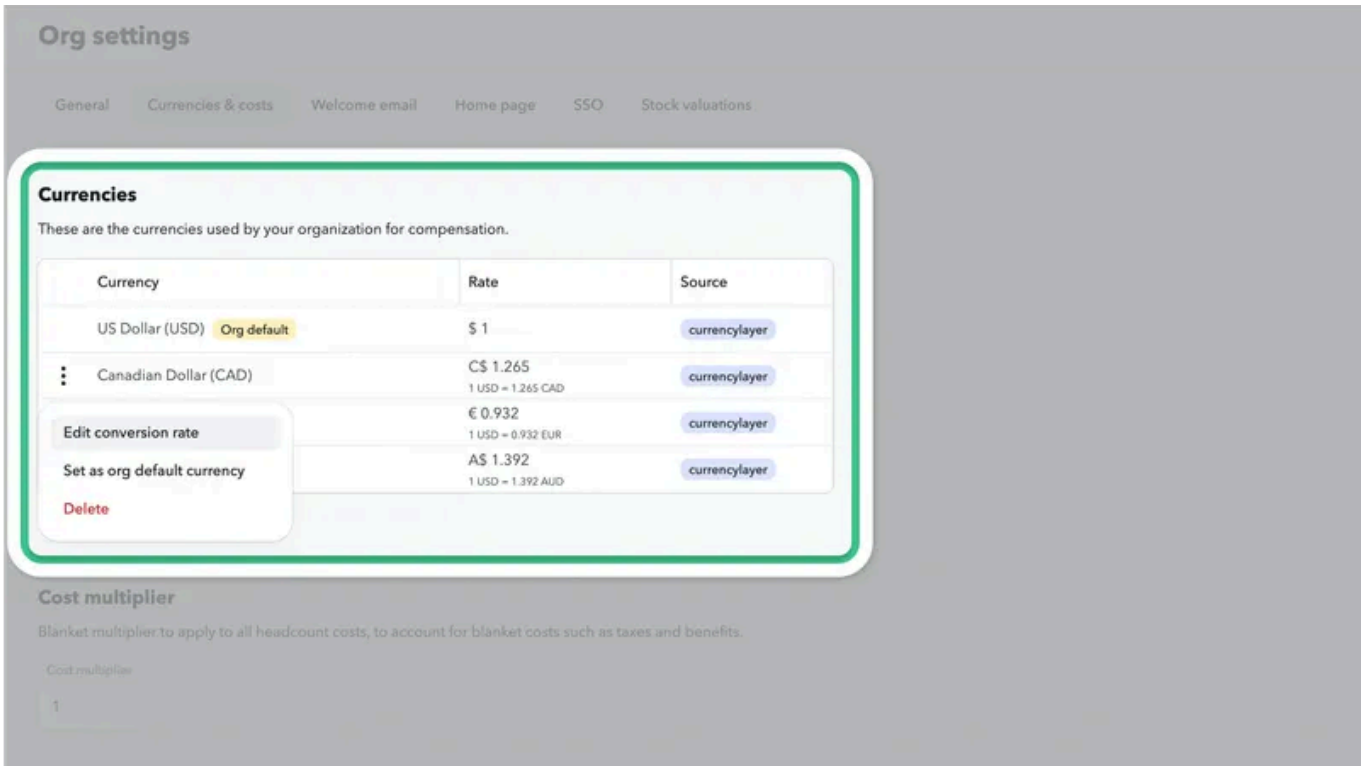
To add a custom currency rate:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. In the **Currencies** section, select **+ Add additional currency**.
4. In the fields that display:
    - **Currency** - Select a currency from the dropdown list. The currencies that display in the list are populated from currencylayer.
    - **Conversion rate source** - Select **Custom** from the dropdown list.
    - **Rate** - Enter a custom currency rate.
    - **Effective date** - Enter the date the custom rate goes into effect.
5. Select **Save** at the bottom of the **Currencies & costs** tab to save your changes.

> You can add multiple custom currencies at once by selecting **+ Add additional currency** multiple times. To delete a new currency row, select the trash can icon.

Edit conversion rate

You can edit the conversion rate for a currency that is already in your list.



To edit the conversion rate:

1. From the left sidebar, select the Settings menu (gear icon) and select **Org settings**.
2. Select the **Currencies & costs** tab.
3. In the **Currencies** section, select the action menu at the left of the row for the currency you want to edit.
4. Select **Edit conversion rate**. The **Edit by rate** dialog displays.
5. In the **Edit by rate** dialog, select the **Custom** option.
6. Enter the custom conversion rate. Once you enter a custom rate, the rate comparison against the default currency automatically updates underneath (for example, 1 USD = 1.25 CAD).
7. Enter an effective date for the conversion rate change.
8. Select **Save**.

> Conversion rates are always based off of the US dollar (USD).
>
> The rate comparisons that display underneath a rate are compared against the default currency for the organization.

Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning

5.12.7.1.4. View past currency rates

When you have more than one currency set up for your organization, you have the ability to view past currency rates. This helps you keep track of how currency rates have changed over time and see clearly how ChartHop has been implementing currency conversions.

To view past currency rates:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. In the **Currencies** section, select the **past currency rates** link. This link is available only when you have more than one currency defined in the Currencies table.
4. In the **Past conversion rates** dialog that displays, you can see the Rate, Effective date, and Source for each currency. You can use the **Currency** and **Rates** dropdowns to filter by currency and by time period.
5. Once you're finished reviewing, select **Close** to exit the dialog.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.1.5. Set smart currency defaults

You can configure a currency to apply by default in situations where monetary values don't have a specified currency (for example, when you import a monetary value into ChartHop and the currency is not included).

The following currency default options can be applied (in any order):

- the job's defined currency
- the currency used in a person's home address country
- the currency used in the job location country

If any of these currency defaults are unavailable, you can also specify a currency to apply.



To set a smart currency default:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.

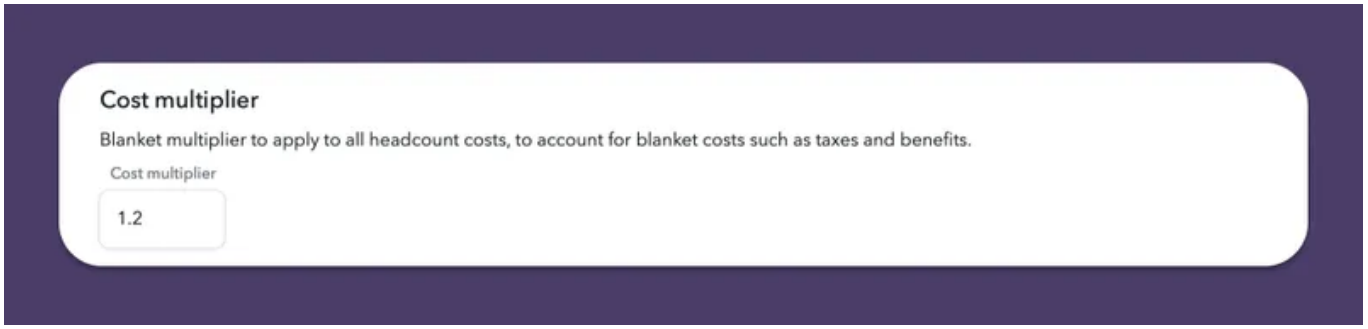
3. Navigate to the **Smart currency defaults** section.
4. From the dropdown list, select a currency to apply when all currency default options are unavailable.
    1. The currencies available in the dropdown are the currencies that are defined for your organization in the **Currencies** section of the **Currencies & costs** tab. **Learn more.**
    2. By default, your organization's default currency is selected.
5. Enable the currency default options you want to apply. You can choose from the following:
    - Job currency
    - Person home address country
    - Job location country
6. Using the move icon (⋮⋮), select and drag the currency default options into the order you want them to apply.
    - The currency default option in the 1st position is applied first.
    - When that currency default option is not available, ChartHop applies the currency default option in the 2nd position, then the 3rd (when enabled).
    - If you only enable one currency default option, that option automatically moves to the 1st position when you save your changes.
7. Select **Save** to save and apply your changes.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.1.6. Apply a cost multiplier

In the **Cost multiplier** section, you can set a cost multiplier to apply to specific headcount costs. This cost multiplier helps you account for blanket costs (such as taxes and benefits) and is applied to values in the following built-in ChartHop fields:

- Annual cost
- Fiscal year cost



To set a cost multiplier:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. In the **Cost multiplier** section, enter your cost multiplier in the **Cost multiplier** field.
4. Select **Save**.

> **Modules:** **HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.2. Starting Salary

Configuring Starting Salary

You can configure starting salaries to automatically prepopulate compensation information on unfilled jobs in ChartHop. When enabled, this feature uses the compensation band assigned to a job to automatically fill in base salary, target variable pay, and target equity values for open positions. This streamlines the job creation process and ensures consistency with your organization's compensation structure.

Prerequisites

Before configuring starting salaries, ensure that you have compensation bands set up in ChartHop. Learn more about compensation bands.

 Starting salary configuration applies to unfilled jobs only. The compensation information prepopulates based on the job's assigned compensation band.

Accessing starting salary configuration

To access starting salary settings:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. Locate the **Starting Salary** section.

Configuring starting salary settings

When you enable starting salary configuration, ChartHop automatically populates compensation fields on unfilled jobs based on their assigned compensation bands. This ensures that open positions display appropriate compensation ranges from the start.

To configure starting salary settings:

1. From the left sidebar, select **Admin**.

2. From the sub-menu, select **Financial**.
3. In the **Starting Salary** section, configure the calculation for populating base salary. Also optionally check off whether you want target variable and/or target equity to populate.
4. Select **Save** to apply your changes.

Starting salary configuration options

The following configuration options are available for starting salary:

Base salary calculation

Select which percentile of the compensation band to use for populating base salary on unfilled jobs:

Option	Description
Band minimum	Populates base salary using the minimum value of the compensation band
Band quarter	Populates base salary using the 25th percentile of the compensation band
Band midpoint	Populates base salary using the midpoint value of the compensation band
Custom Percentile	Populates base salary using a custom percentile you specify (e.g., 30th percentile, 75th percentile)

Effective date

Set an effective date to determine which version of your compensation bands to reference. ChartHop uses the compensation band data as of the specified effective date to calculate starting salary values.

Optional compensation components

Select which additional compensation components should prepopulate:

- **Target variable** - Check to automatically populate target variable pay from the compensation band

- **Target equity** - Check to automatically populate target equity from the compensation band

How starting salary works

Once enabled, starting salary configuration works as follows:

- When you create a new unfilled job with an assigned compensation band, the compensation fields automatically populate with values from that band.
- If you change the compensation band on an unfilled job, the compensation values update to reflect the new band.
- This feature only affects unfilled jobs; filled positions retain their existing compensation data.

 If a job doesn't have a compensation band assigned, the compensation fields remain empty and must be filled in manually.

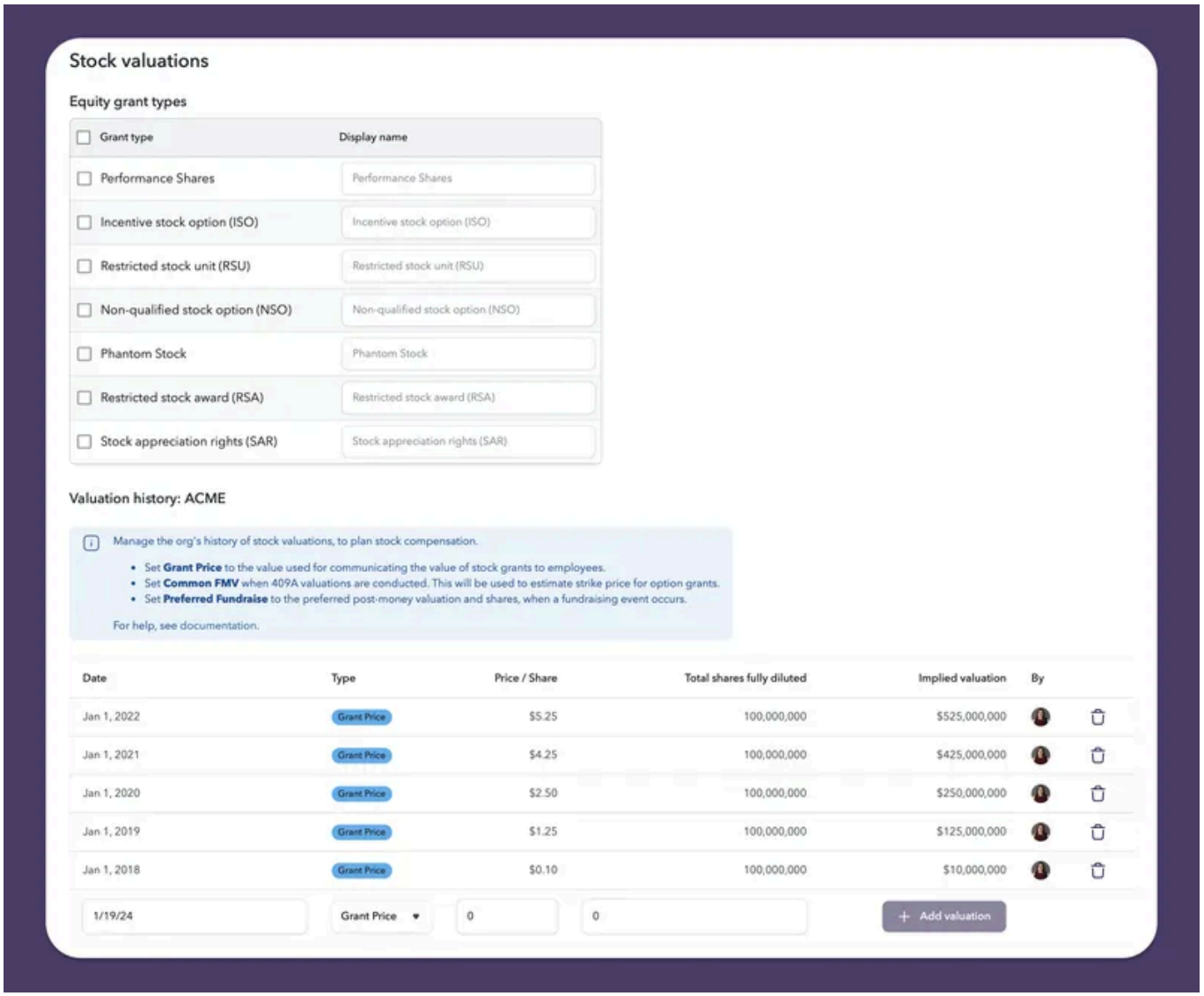
Packages: Basic | Headcount Planning | Compensation Reviews | Performance | Engagement | HRIS

Access roles: Owner, users with permissions to configure financial settings

5.12.7.3. Setting up Stock valuations

In the **Stock valuations** tab, you can create stock options for your employees through option grants, strike prices, and fundraising events in your ChartHop organization.

You can use Stock valuations to manage and configure your stock options for your organization's employees, determine the strike price for option grants, and establish amounts to be allocated for fundraising events.



To create a stock valuation:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Financial**.
3. Scroll down to the **Stock Valuations** section.

4. In the **Date** field, enter the date when the stock valuation will be established.
5. In the **Type** field, use the dropdown to select a stock value type:
    - **Grant Price:** This should be the price used to determine employee compensation value -- the company's "best value" (as described by Fred Wilson in this **classic blog post**). When determining the present value of a stock option grant, grant price will be calculated against strike price.
    - **Common FMV:** Fair Market Valuation performed, usually by an outside firm, to value the company's common stock for safe harbor under IRS 409A. These prices are used as the strike price for stock option grants
    - **Preferred Fundraise:** This is the price most recently paid by investors for preferred stock, entered when the company raises outside investment.
6. In the **Price/Share** field, enter the value of your price per share.
7. In the **Total shares fully diluted** field, enter the value of your organizations total number of shares.
8. Select **+ Add valuation** to create the stock valuation.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.7.3.1. Stock grants

ChartHop tracks stock grants over time to plan and manage employee compensation, including:

- **Valuations**: the current value of the company's stock
- **Planned Grants**: for open roles, new hires, or existing employees -- the amount that has been communicated or targeted, but not yet issued
- **Actual Grants**: the grants that have been actually issued, including vesting schedules

Valuations: Private Companies

From the Org Settings page, org Owners can set the stock price history of your company over time.

You can set three types of prices:

- **Common FMV**: Fair Market Valuation performed, usually by an outside firm, to value the company's common stock for safe harbor under IRS 409A. These prices are used as the strike price for stock option grants.
- **Preferred Fundraise**: This is the price most recently paid by investors for preferred stock, entered when the company raises outside investment.
- **Grant**: This should be the price used to determine employee compensation value -- the company's "best value" (as described by Fred Wilson in this classic blog post). When determining the present value of a stock option grant, grant price will be calculated against strike price.

> If you're not sure what to set Grant Price to, it'd be reasonable to set it to the most recent preferred price (if it's been 6+ months since last fundraise) or the most recent preferred with a 20% discount for common (if coming immediately off a fundraise).

Valuations: Public Companies

- For public companies, the **Public Market Price** will automatically be pulled on a daily basis, and a 60-day rolling average will be used when displaying the current value of

compensation.
- However, you will still want to set **Grant Price**, which will determine the formula used to calculate the amount and value of a stock grant that was issued in a given period.

Planned Grants

These are grants that are planned but not yet issued:

- For open roles, the expected target compensation
- For new hires, the amount that was communicated in the offer package
- For employees, any planned refresh grants

To set Planned Grant value, select a job, click Edit Job, and edit the value in the Compensation tab. Planned Grants can be set in dollars or shares, and can be specified as RSUs or options.

An employee's Planned Grant value will appear on their employee profile, under the Equity Grants tab. When an employee receives any actual stock grants, Planned Grant as of that date will automatically reset to zero.

Actual Grants

These are the record of each grant issued to employees, including RSUs, ISOs, and NSOs and including the vesting schedule.

- If you are using cap table management software, such as Carta or E*Trade, to track your cap table, you can sync grants automatically by installing the appropriate app.
- If you're not using cap management software, you can upload the grants after they are issued via a CSV spreadsheet import.

Grants will appear on the employee's profile, under the Equity Grants tab.

For purposes of calculating Annual Equity Compensation, the system will calculate, based on current Grant Price (private companies) or Public Market Price (public companies), the value vested in the upcoming year for any given employee.

> Example: If Sarah has a grant for 10,000 ISOs on a four-year vesting schedule with a strike price of $0.50 and the most recent Grant Price is $5.00, Sarah's Annual Equity Compensation will be ($5.00 - $0.50) * 10,000 / 4 = $11,250, for a year's worth of vesting. If Sarah only had six more months before being fully vested, Annual Compensation would be $5625.

Data Sensitivity

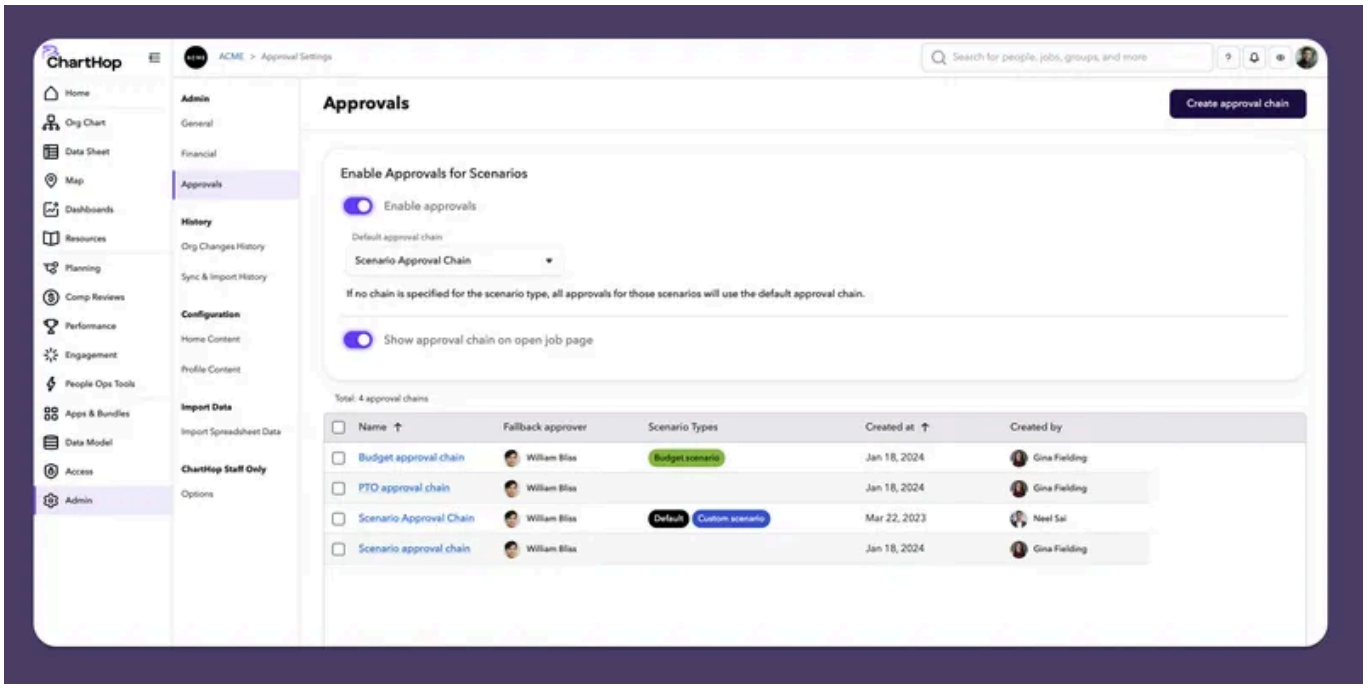
Stock grants are considered sensitive compensation information. Grants (both planned and actual) are visible to the grant recipient, their managers, and those with special access to view equity compensation.

Stock prices are normally considered org-public information so that employees can understand the value of their compensation. However, if you do not wish your org to have access to stock prices, email us at **support@charthop.com**.

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.8. Enabling approvals

In the **Approvals** page, you can determine whether approvals are required for proposed changes to your organization and how they're handled.

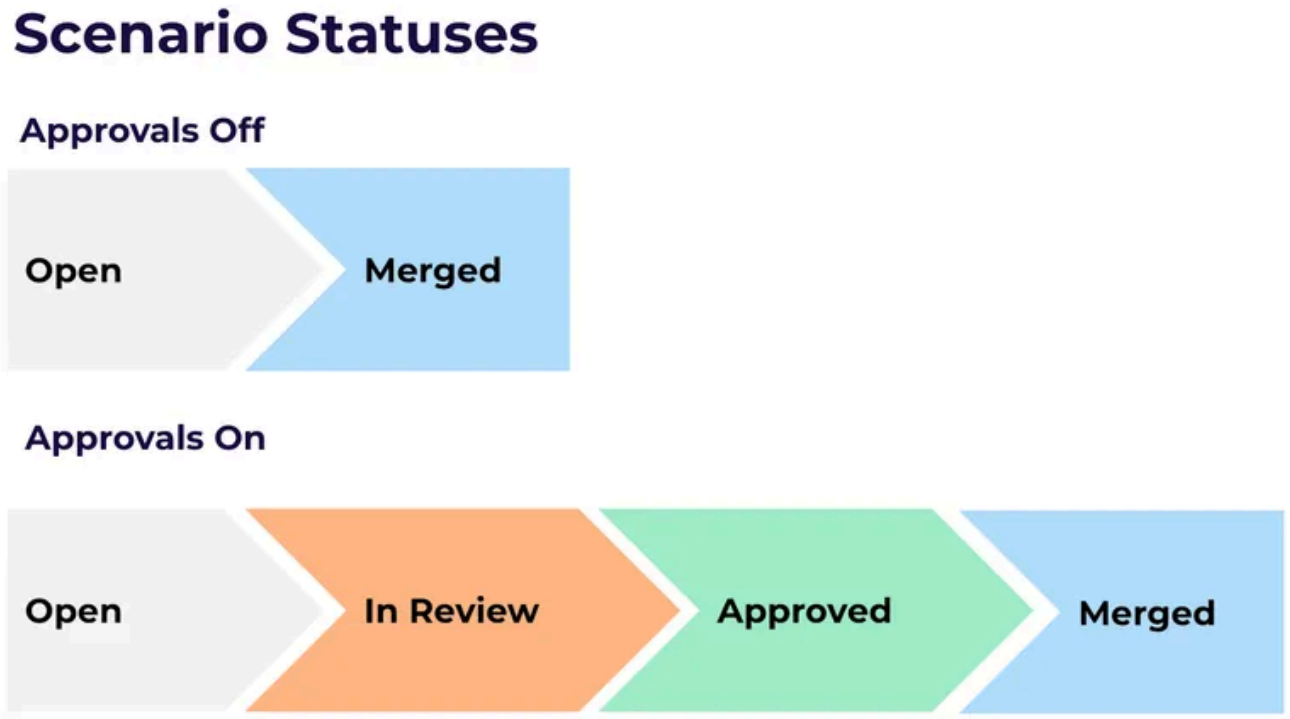


Enable approvals for scenarios

When you enable approvals for scenarios, scenarios go through an additional review and approval process before they can be merged to your Primary organization.

Instead of moving directly from an **Open** status to a **Merged** status, scenarios go through review and can be merged only when they have a status of **Approved**. Learn more.

You select approvers who review and approve all submitted scenarios and specific people to notify once the scenario is approved so they can merge the scenario. A scenario is considered approved once all approvers have given their approval.



To enable approvals for scenarios:

1. From the left sidebar, select **Admin**.
2. From the sub-menu, select **Approvals**.
3. Turn on the **Enable approvals** setting.
4. From the upper right of the page, select the button **Create approval chain**.

> When you enable approvals, you must define at least one Approval Chain. When an approval chain is not defined, the **Enable approvals** setting is automatically disabled.
>
> Approvers must be users in ChartHop within a job. Approvers are automatically added to submitted scenarios as a collaborator with **Editor** permissions. Learn more.Select a fallback approver

Disable approvals for scenarios

When you turn off the **Enable approvals** setting, approvals requirements are removed for scenarios. You can merge scenarios to primary without review and approval as long as you have the **Owner** or **Org editor** roles.

Any scenarios that have not been merged (with a status of **In Review**, **Rejected** or **Approved**) revert back to the **Open** status. **Learn more.**

> **Modules: HRIS | Engagement | Goals | Performance | Compensation Reviews | Headcount Planning**

5.12.8.1. Relative to: submitter vs. scenario job

Once approvals are enabled, you can create your first approval chain. There is no limit to how many approval chains you can have, however they will only be utilized if they are assigned as the default chain, or assigned to specific scenario types.



An approval chain consists of the following:

Submitter: Person who is submitting the scenario request

Approver(s): Person(s) who will be responsible for approving or rejecting the changes requested.

Fallback approver: Person who will be placed in the approval chain if the designated approver is no longer in your org. If a person is reporting to an open job, their manager's manager will receive the request for approval rather than the open job.

People notified: Anyone in your org with access to merge a scenario is allowed to be set as a notified person.

When an approver is sourced from a person field — for example **Manager of requester**, **Second-level manager of requester**, or a custom person field like **Hiring Manager** — you can choose whose record that field is read off of.



The **Relative to** toggle appears beneath the approver source dropdown and offers two options:

- **The person submitting the scenario** — the field is read off the submitter's own record. This is the default and matches previous behavior. Use this when the approver should be derived from *who is filing the request* (e.g., "the submitter's manager must approve").
- **The job in the scenario** — the field is read off the job (or jobs) being changed in the scenario. Use this when the approver should be derived from *the job under review* (e.g., "the Hiring Manager on the open req must approve").

How multi-job scenarios resolve

When **Relative to** is set to **The job in the scenario**:

- If the scenario contains **one job**, you get one approver.
- If the scenario contains **multiple jobs**, you get an approver group containing every unique value of the field across those jobs. Each approver in the group is treated like any other group approver in the chain.

When the toggle is hidden

The **Relative to** toggle only appears for field-based approver sources. It is hidden when the approver is configured as:

- **Specific persons** — no field lookup is involved, so the toggle is not applicable.
- **Custom expression** — the expression itself already determines what the approver resolves against.

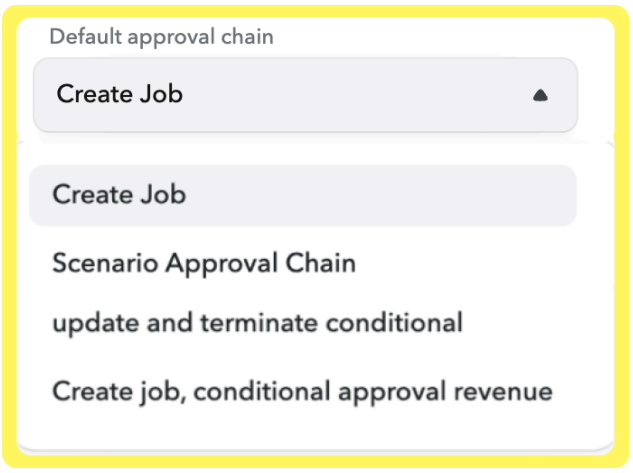
Reading the chain visualizer

Each stage card in the approval-chain visualizer shows a subtitle indicating which mode the approver uses — either **Relative to submitter** or **Relative to job** — so you can confirm at a glance that the chain is configured as intended.

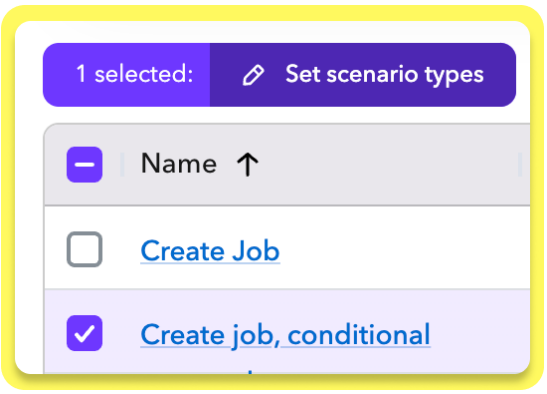
Assigning approval chains

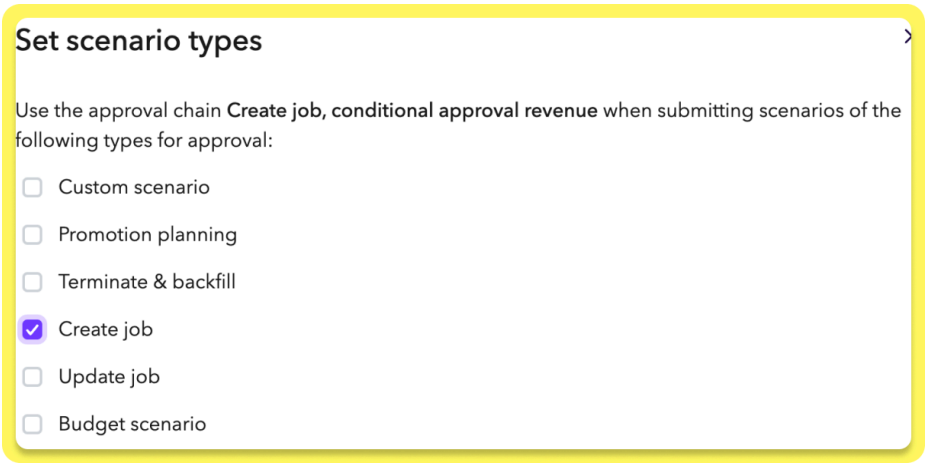
Once you have approval chain(s) created, you can designate chains to be used on certain types of scenarios created.

At the top of the setup page, you can set a default approval chain for all scenario types that do not have an approval chain assigned.



You can make a chain the default chain for specific types of scenarios by checking the box next to your chain, and choosing which scenario types it should be used for.





This will override your default approval chain for those scenario types.

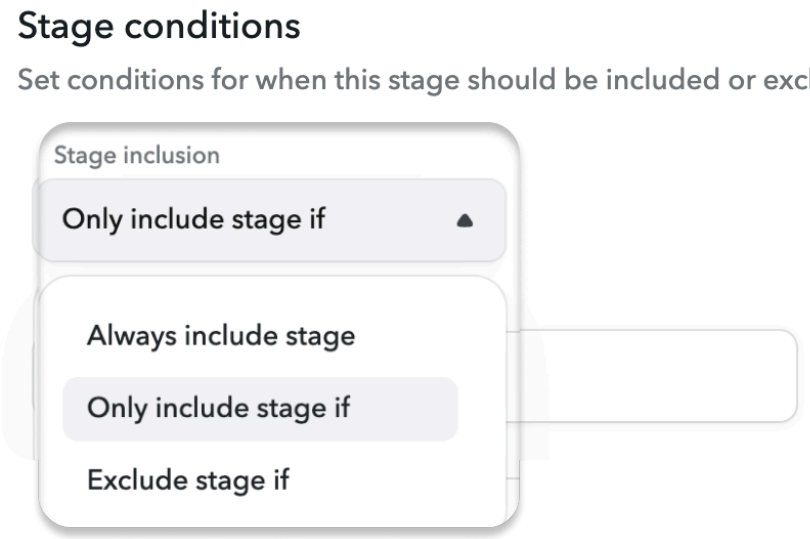
Packages: **Headcount Planning | Compensation Planning | HRIS**

5.12.8.2. Change-based approvals

Not all approval chains are linear. Change-based, or conditional, approvals allow your team to create approval chains based on the submitter, or changes made within the scenario.

> We recommend ensuring that there is at least one non-change-based approval step in your chain. If a scenario does not meet the requirement for any conditional approval steps, it will display a message for the user to reach out to their administrator.

A stage of the approval process can be included always, only if certain conditions are met, or to be excluded under certain conditions.



You can set approval steps to trigger on **ANY** or **ALL** changes in a scenario, as well as the total **COST** of the scenario. You also have the option to leverage Carrot to customize your pathways if it does not meet any of the above requirements.

ANY or ALL Changes

To customize your approver for selecting **ANY** or **ALL** changes in a scenario, the approval chain logic will look at the job BEFORE changes in the scenario unless you specify change.after...

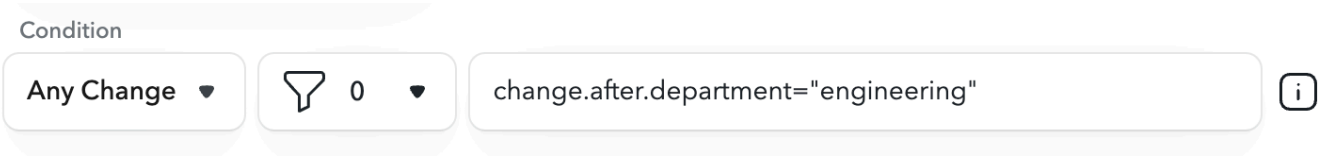
Examples:

Include this stage if ANY or ALL changes in a scenario involve a job that was originally in the engineering department before change, OR there is a new job created in the engineering department:

department="engineering"

Include this stage if ANY or ALL changes in a scenario involve a job that was changed to being in the engineering department. This will NOT look at new jobs created in the scenario:

change.after.department="engineering"

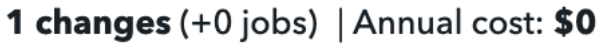


Cost

When determining an approver based on the cost of the scenario changes, the “cost” value that the approval chain references is the total cost of the scenario located at the top of the page.

For example, If you are **UPDATING** an existing job and not changing compensation, that cost will stay at $0.

If you are terminating a role and creating a backfill with the same compensation, the total cost will also remain at $0.



If you **CREATE** a new job and add compensation, the total cost will adjust accordingly.

If you change the compensation of an existing open or active job, or terminate a job without a backfill, the cost will also adjust.

2 changes (+1 job) | Annual cost: **$50,000**

Custom

Choosing the custom change identifier will default to reference the person submitting the request, unless you specifically reference scenario changes.

When writing your custom Carrot logic, it will default to looking at the submitter unless you specify "scenarioChanges.any{}" or "scenarioChanges.all{}"

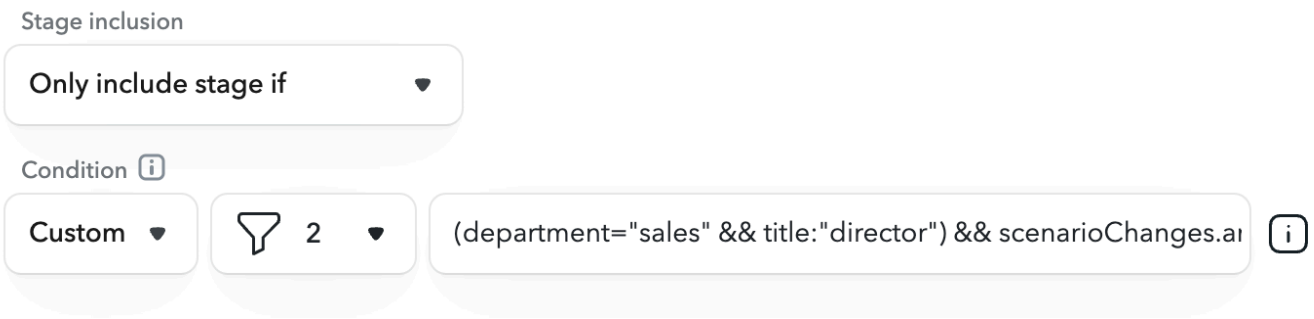
Examples:

Include this stage if the person submitting this scenario is in the engineering department and whose title contains “manager”:

department="engineering"&& title:"manager"

Include this stage if the person submitting this scenario is in the sales department and whose title contains “director”, **and** if the job they are changing is in the sales department:

(department="sales" && title:"director") && scenarioChanges.any{department="sales"}



Packages: Headcount Planning | Compensation Planning | HRIS

5.12.9. Configuring profiles

As an Owner or Technical owner, you can use custom profile tabs to present forms to your employees that help your organization track information. For example, you can create a custom profile tab that captures and displays an employee's established goals for the quarter.

Configuring your custom profile tabs

You can define the name, listing order, and who can access your custom profile tabs.

For example, you could create a custom profile tab with the label "Quarterly Goals" as the first tab in an employee's profile and set that tab to only be accessible to Employees and their Managers.

Creating content for your custom profile tabs

After creating and configuring a custom profile tab, you can add and organize its content by using tab blocks. Tab blocks allow you to structure the content of your profile tabs so that you may control the type, order, and role view permissions for every segment of content inside your custom profile tabs. Content can be added using Markdown or CQL expressions in the Markdown editor. In addition to the markdown editor, you also have the option to insert custom fields into your tab blocks.

> You can **create custom fields** to use in your tab blocks. Or, you can import pre-made custom fields using **bundles.**

Using our Quarterly Goals tab idea as an example, you could:

- Create a tab block that contains a prompt of questions for Employees about their goals for the quarter using a combination of questions written via the Markdown editor.
- Add a series of additional questions that would require a response measured on a scale of 1 to 10, such as job satisfaction, via custom fields.
- In another block, add a section where Managers could add feedback notes in response to the Employee's cited goals.

To further customize whether fields are shown/hidden on the About, Personal History, and Job History employee profile tabs for your organization, please contact ChartHop Customer Success.

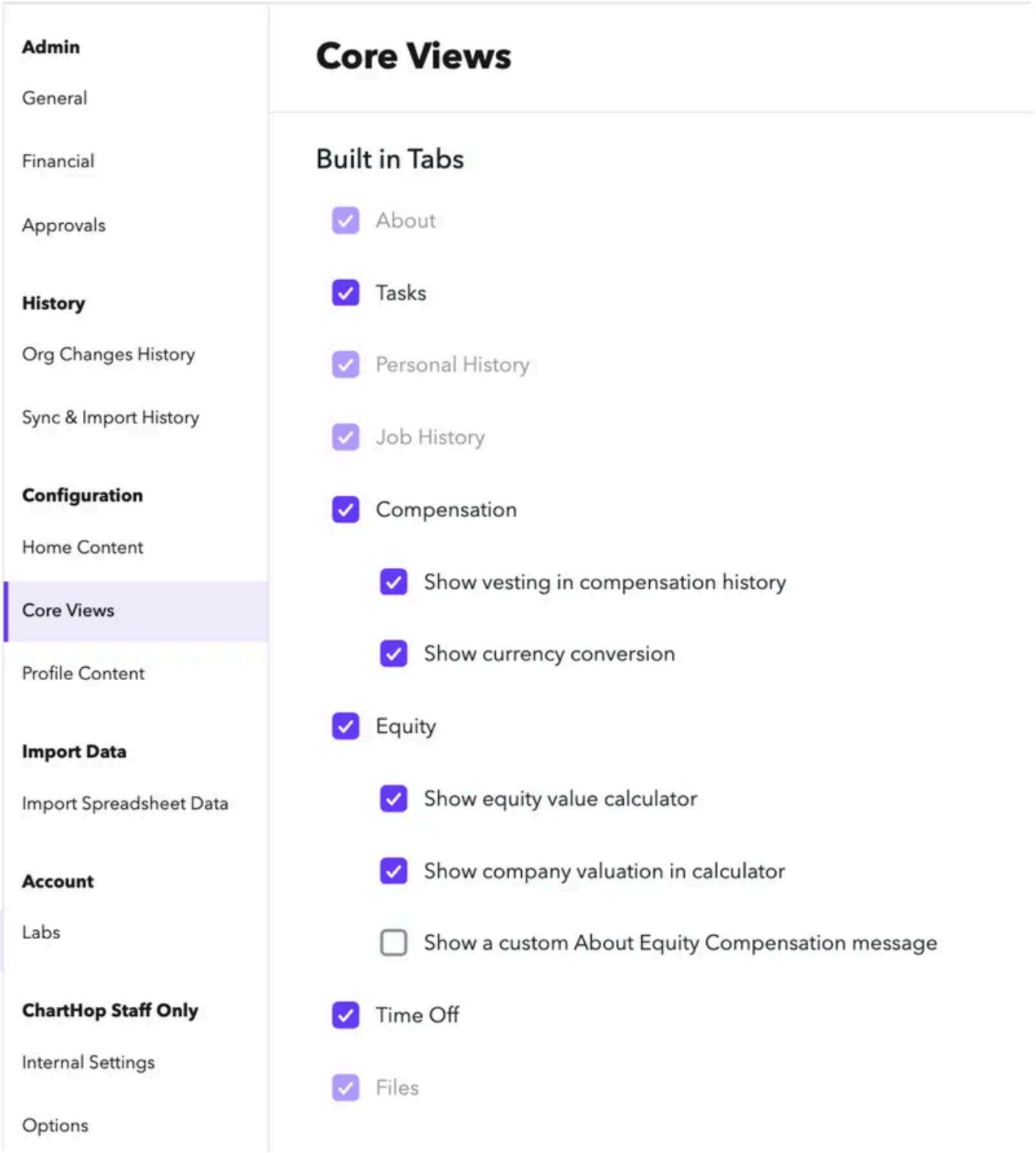
5.12.9.1. Default profile tabs

There are 8 built-in tabs that display on employee profiles. These are:

- About
- Tasks
- Personal History
- Job History
- Form Response History
- Compensation
- Equity
- Time Off
- Files

Configuration

You can select which tabs are visible to your employees by going to Core Views and unchecking the box next to a profile tab to hide it.



Form Response tab

This tab allows you to view all the form responses that you've submitted.

Access to form response is based on the setup of the form, but **you can always access all the forms that you've submitted.**

Ability to edit a form response depends on form settings.

Files tab

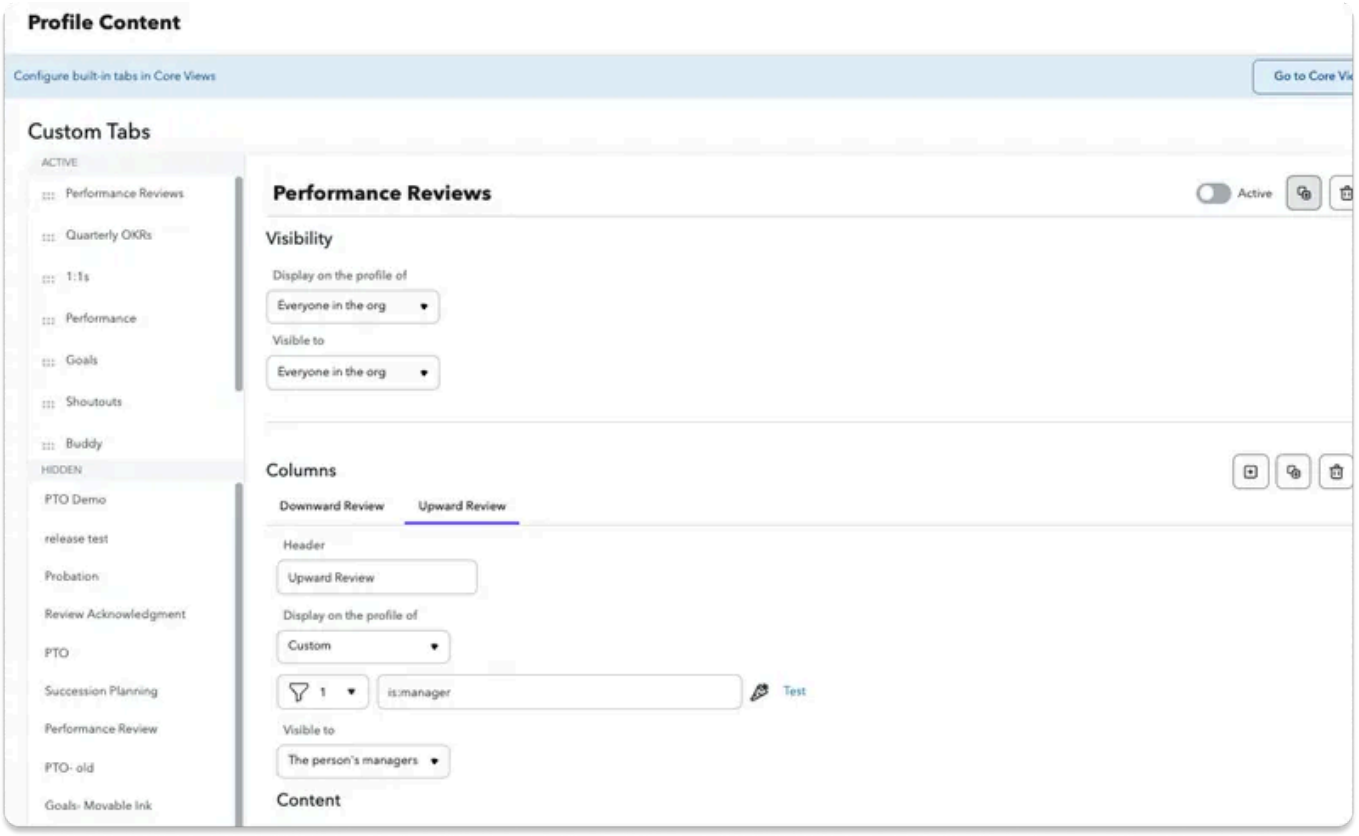
Files can be uploaded for an employee using the `file` type field (learn more about that field type here).

Users with an Owner, People Ops Admin access can upload files directly to an employees profile in the files tab. They can also delete files with one click.

Files uploaded for an employee will display in this profile tab, with visibility guided by access controls.

5.12.9.2. Custom profile tabs

You can create new custom profile tabs and add them to your ChartHop organization's employee profiles.



Create a custom profile tab

To create a custom profile tab:

1. From the left sidebar, select **Admin.**
2. From the sub-menu, select **Profile Content.**
3. In the profile tab view, at the bottom of the page, select the **+** button to create a new empty tab.
4. Name your tab by giving it a **Label** on the top of the tab.
5. Select **Apply** on the bottom right. If you don't see the **+** button in the tab view, try scrolling your browser window all the way to the right.

To duplicate a custom profile tab:

1. From the left sidebar, select **Admin.**

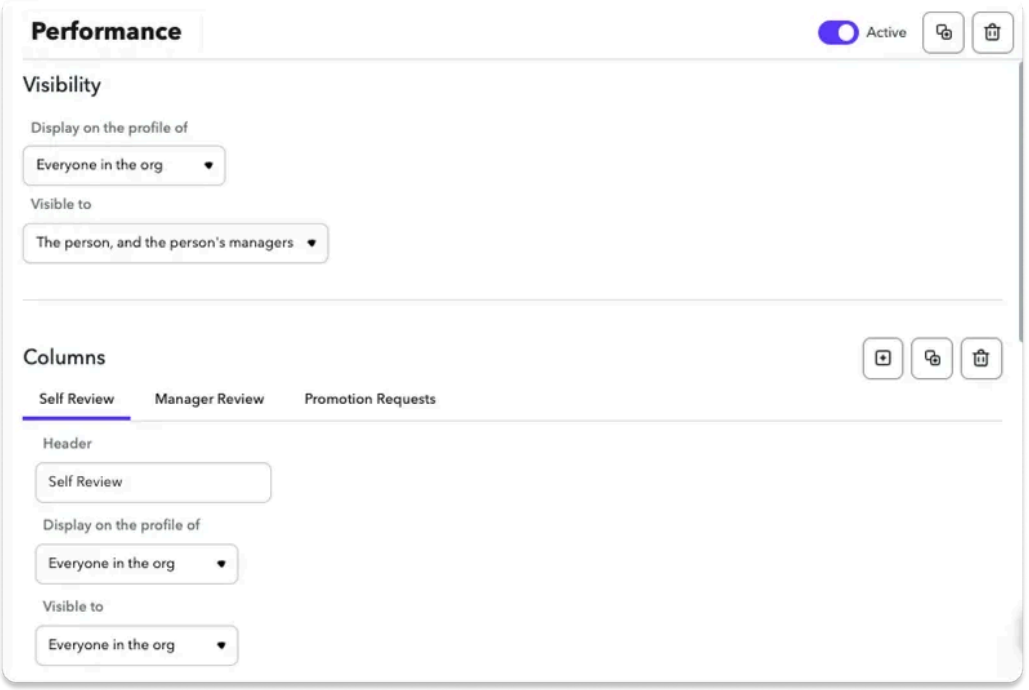
2. From the sub-menu, select **Profile Content.**
3. In the profile tab view, at the top right of the page, select the duplicate button to create a new tab with the same settings and columns.

To delete a custom profile tab:

1. From the left sidebar, select **Admin.**
2. From the sub-menu, select **Profile Content.**
3. In the profile tab view, at the top right of the page, select the delete button to remove this profile tab.

Configure a custom profile tab

You can give your custom profile tab a name, and configure how it appears in the employee profille.



Available settings include:

- **Label** - The label displayed for the tab. Newly created tabs are given the label of "New Tab" by default.
- **Active** - The tab's status. Newly created tabs are inactive by default.
- **Display on the profiles of** - The tab will only be visible on people's profile who match the filtered criteria. Supports Carrot Query Language filters. No filters are applied by default so it will appear on all profiles.

    - For example, if you want to create a tab for "Sales 1:1s" that would only appear on the profile of people in the Sales department you can add a `department="sales"` filter.
- **Visible to** - Who can view the profile tab.
- **Ordering** - you can drag and drop tabs to re-order them. Click the grab handle on the left to move tabs.

To configure a tab's settings:

1. From the left sidebar, select **Admin.**
2. From the sub-menu, select **Profile Content.**
3. Select the tab you wish to configure from the top of the view.
4. Apply the following settings in the **Visibility** section:
    - **Label** - The label displayed for the tab. This is located at the top of the profile tab.
    - **Active** - The tab's status. Inactive tabs will not be shown.
    - **Visible to** - Who can view the profile tab.
    - **Display on the profiles of** - The tab will only be visible on people's profile who match the filtered criteria. Supports Carrot Query Language filters. No filters are applied by default so it will appear on all profiles.
5. Select **Save**.

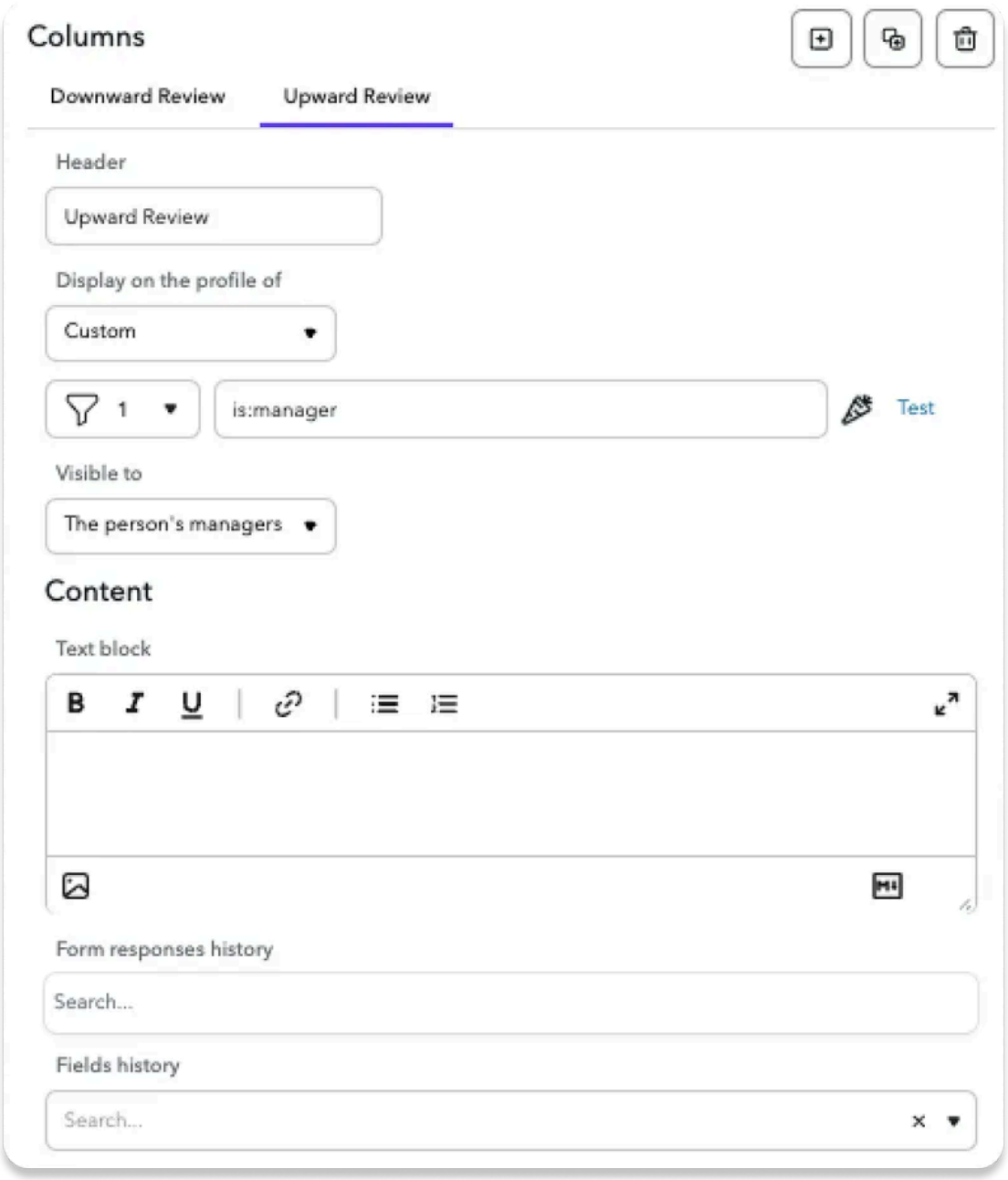
Add columns to custom profile tabs

You can add up to 4 columns to a custom profile tab.

Each column can contain optionally contain 3 things:

1. A custom content block
2. Form Response History for a form or multiple forms (Recommended)
3. Field History for a field or set of fields

Columns can also be configured to only show up for certain people or on the profiles of certain people.



Configure columns in a profile tab

To add a column to a custom profile tab:

1. From the left sidebar, select **Admin.**
2. From the sub-menu, select **Profile Content.**
3. Select the tab you wish to add a tab column to from the top of the view.
4. In the **Tab Columns** section, select the **+** button to create a new blank tab column.
5. Apply the following settings in the **Tab Columns** section:
    - **Header** - The label that will be displayed for the column.
    - **Display on the profiles of** - Who's profiles the column should appear on

- **Visible to** - Who can see the column
- **Form Responses History** - Allows you to show every response about the person to a certain form.
  - Recommended for most form-based use cases.
  - A card of each individual form response will display, historically, in a descending chronological order.
- **Fields History** - Allows you to add custom fields to your tab column.
  - Recommended when needed to display the change in fields not related to a form.
  - Fields will appear as individual cards that will display, historically, in a descending chronological order.
  - Custom fields must be created in order to be accessible from the fields list. Learn more.
- **Custom Content** - An area where you can create and edit the content of your tab using the rich text editor, Carrot Template syntax, or using Markdown.
  - Custom content appears at the top of the column, ahead of any form responses or field history cards.

6. In the **Tab Configuration** panel on the bottom right of the tab, select **Apply** to save the tab column.

To duplicate a column in a profile tab:

1. From the left sidebar, select **Admin.**
2. From the sub-menu, select **Profile Content.**
3. In the profile tab view, to the right of **Columns** header, select the duplicate button to create a new column with the same settings and content.

To delete a custom column:

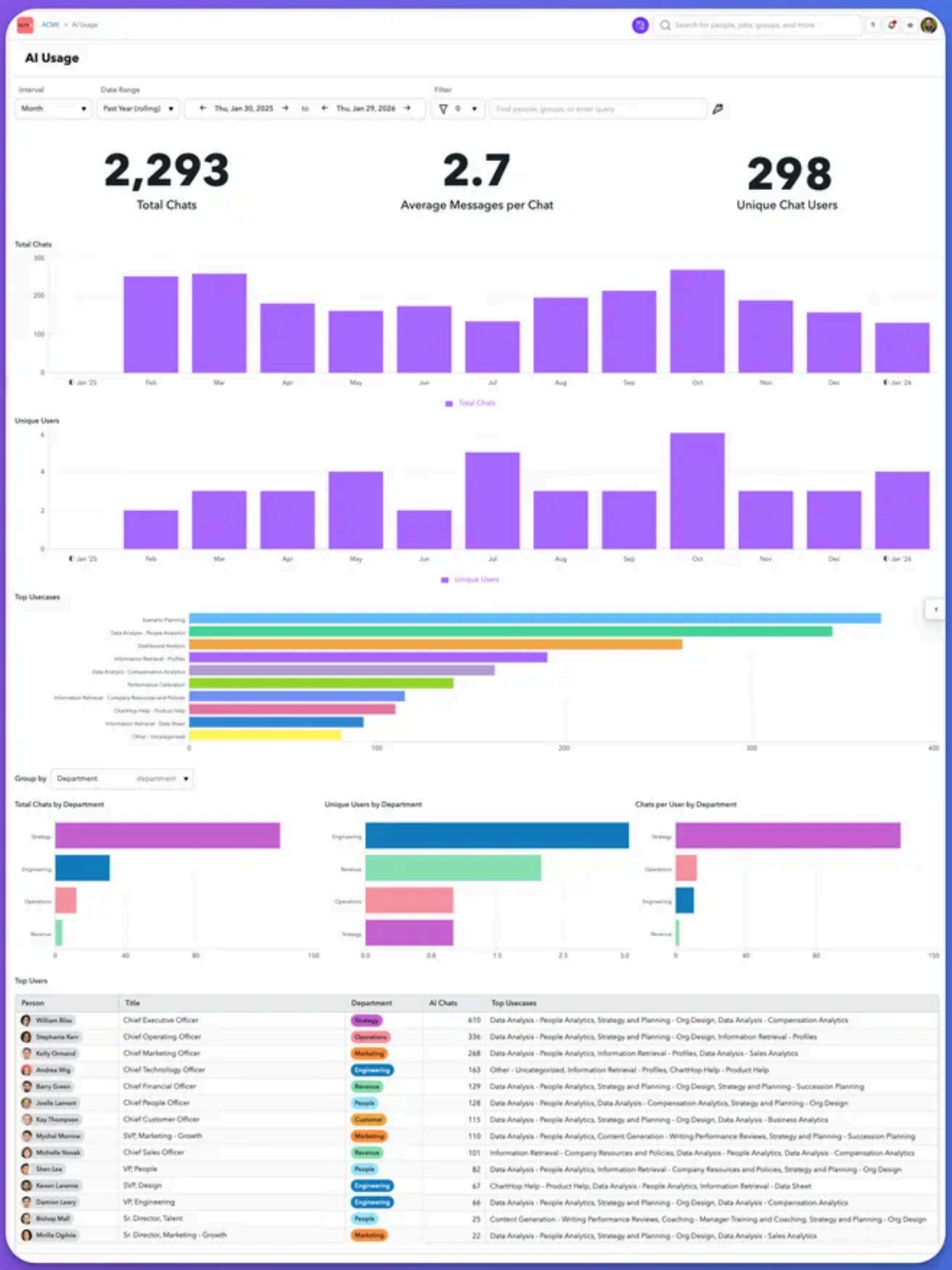
1. From the left sidebar, select **Admin.**
2. From the sub-menu, select **Profile Content.**

3. In the profile tab view, to the right of **Columns** header, select the delete button to remove the column.

5.13. AI Usage

The **AI Usage** view provides administrators with visibility into how AI features are being used across their ChartHop account. Use this dashboard to understand adoption, monitor usage trends over time, and identify where AI is providing the most value across teams and individuals.

You can find this view at **Admin > History > AI Usage**.



AI Usage Dashboard

What you can do

From the AI Usage dashboard, you can:

- Track overall AI activity across your organization
- See how many people are using AI features
- Understand which AI use cases are most common
- Compare usage across departments
- Review AI usage (generalized) by individual users

This view is read-only and intended for auditing, monitoring, and analysis.

Date range and filters

At the top of the page, you can adjust the scope of the data shown:

- **Interval**: View usage aggregated by month (or other available intervals).
- **Date range**: Select a predefined range (for example, past year rolling) or a custom start and end date.
- **Filter**: Narrow results by people, groups, or other supported filters.

All charts and tables on the page update based on your selected filters.

Summary metrics

The top of the dashboard highlights three key metrics for the selected time range:

- **Total chats**: The total number of AI chat sessions initiated.
- **Average messages per chat**: The average number of messages exchanged within each chat session.
- **Unique chat users**: The number of distinct users who interacted with AI features.

Use these metrics to quickly gauge overall adoption and engagement.

Usage over time

Total chats

The **Total Chats** chart shows how AI chat volume changes over time. This helps identify trends such as increasing adoption, seasonal spikes, or periods of lower usage.

Unique users

The **Unique Users** chart displays how many distinct users engaged with AI during each interval. This is useful for understanding whether usage growth is coming from more users or heavier usage by the same users.

Top use cases

The **Top Usecases** section ranks the most common ways AI is being used, such as:

- Scenario planning
- People analytics
- Dashboard analysis
- Information retrieval (for example, profiles, policies, or data sheets)

Use this view to understand which workflows are benefiting most from AI and where additional enablement or guidance may be helpful.

Usage by group

You can group AI usage by organizational attributes, such as **Department, Location, Teams,** or any Field.

When grouped, the dashboard shows:

- **Total chats by group**: Which teams generate the most AI activity.
- **Unique users by group**: How many people in each group are using AI.
- **Chats per user by group**: Average intensity of AI usage per user within each group.

These comparisons can help identify differences in adoption across teams.

Top users

The **Top Users** table lists individuals with the highest AI usage during the selected period. For each user, you can see:

- Name and title
- Department
- Number of AI chats
- Most common AI use cases

This table is useful for identifying power users, champions, or teams that may be early adopters of AI features.

Privacy and data visibility

The AI Usage dashboard is designed to provide transparency into AI adoption while protecting individual privacy and sensitive information.

- The dashboard **does not display the exact prompts, questions, or messages** that users submit to AI features.
- Administrators cannot view the full content of individual AI conversations.
- Usage is summarized and categorized to show the **nature of the use case** (for example, scenario planning, analytics, or information retrieval) without exposing specific inputs or outputs.

This approach helps organizations understand how AI is being used while maintaining appropriate privacy boundaries for employees.

Notes and limitations

- The AI Usage dashboard reflects activity within ChartHop's AI-powered features only.
- Metrics are aggregated and intended for usage monitoring, not performance evaluation.
- Availability of filters and group-by options depends on your account configuration.

6. ChartHop AI

ChartHop AI is a collection of AI capabilities across the ChartHop platform to help you and your employees gain insights about the people and job data at your organization.

ChartHop AI Disclaimer

In an attempt to be helpful, ChartHop AI can occasionally produce responses that are incorrect or misleading.

This is known as "hallucinating" information, and it's a byproduct of some of the current limitations of generative AI models.

In an effort to ensure accuracy of the response, we have designed ChartHop AI to display the ChartHop view and relevant information to the left of the ChartHop AI window. We call this our 'Show your work' feature.

If you have questions about ChartHop's secure and mindful approach to AI see our **AI Usage Policy**.

Types of ChartHop AI Features

ChartHop has the following AI feature types:

1. **Impact Buttons** - buttons placed conveniently throughout the ChartHop platform to enable one-click AI insights and actions. Availability depends on your plan.
2. **Ask ChartHop** - an open ended chat interface to start a dialogue by asking questions and responding to answers. Available to try for all customers. Access will later be restricted to only to HRIS customers.
3. **AI Summaries** - See summaries of open text form responses in reviews, surveys or other forms. Available to HRIS, Performance and Engagement customers.
4. **AI Scenario Planner** - Use AI to generate organization updates or scenarios. Available to Planning customers.
5. Ask ChartHop on Home Page - Surfaces Ask ChartHop prompt suggestions directly on the ChartHop homepage.

6. **AI Chat Write Actions** - Allows the AI to make changes to org data directly from a chat conversation.
7. AI Form Response Summaries - Automatically generates a summary of form responses (e.g., 1:1 notes, review feedback) using AI.

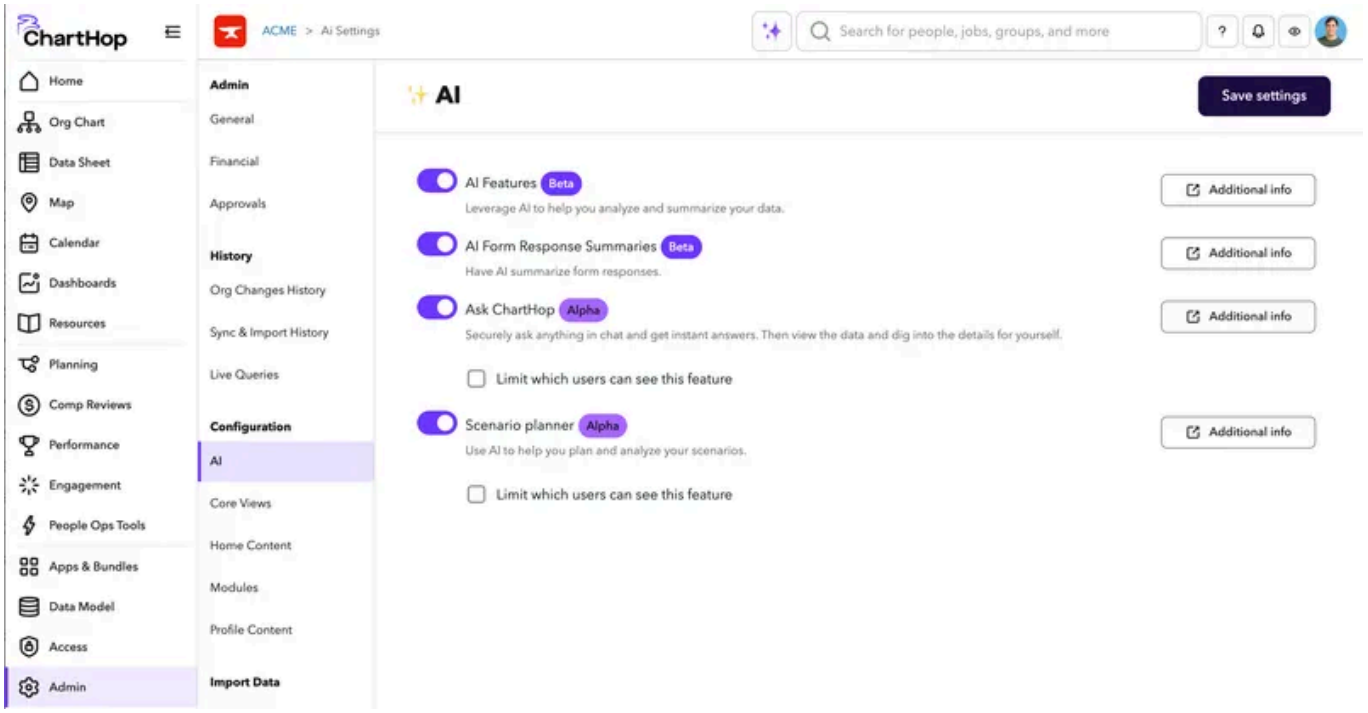
In addition to all the features listed above, ChartHop also offers a ChartHop **AI Pro** module which takes ChartHop AI capabilities even further with Ask ChartHop in Slack and Microsoft Teams*, Custom Agents, truly Agentic Actions, Bi-directional MCP Support*, and more.

** coming soon!*

How to turn on AI Features

Your organization administrator must opt in to using ChartHop's AI features. AI features access may be limited to select users.

1. Navigate to **Admin** > **AI**
2. Toggle on **AI Features** and click **Save settings**.
3. Toggle on any of the specific AI settings.
4. Select **"limit which users can see this feature"** if you would like to only give specific people access to AI initially.

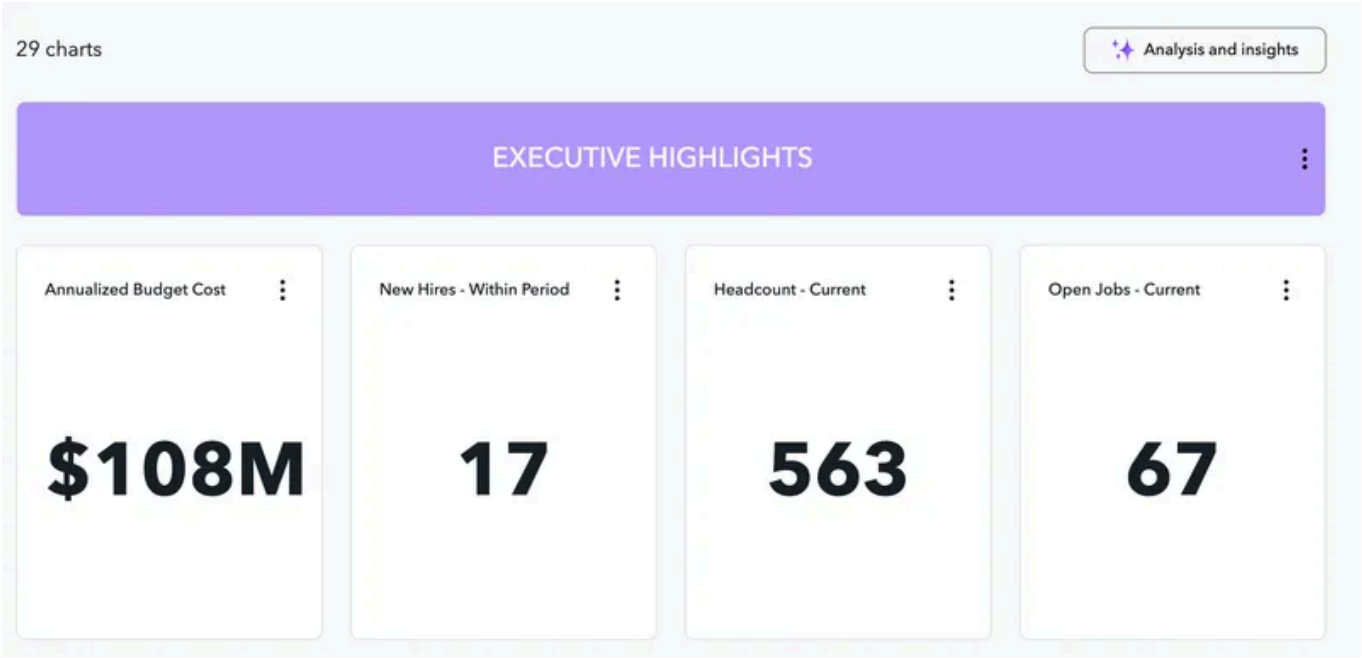


This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to set up an Alpha Feature

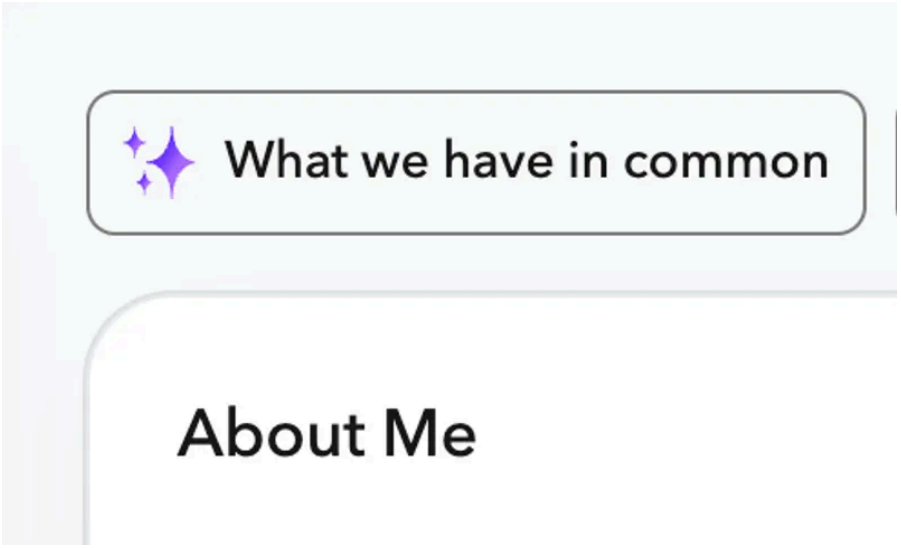
1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Impact Buttons



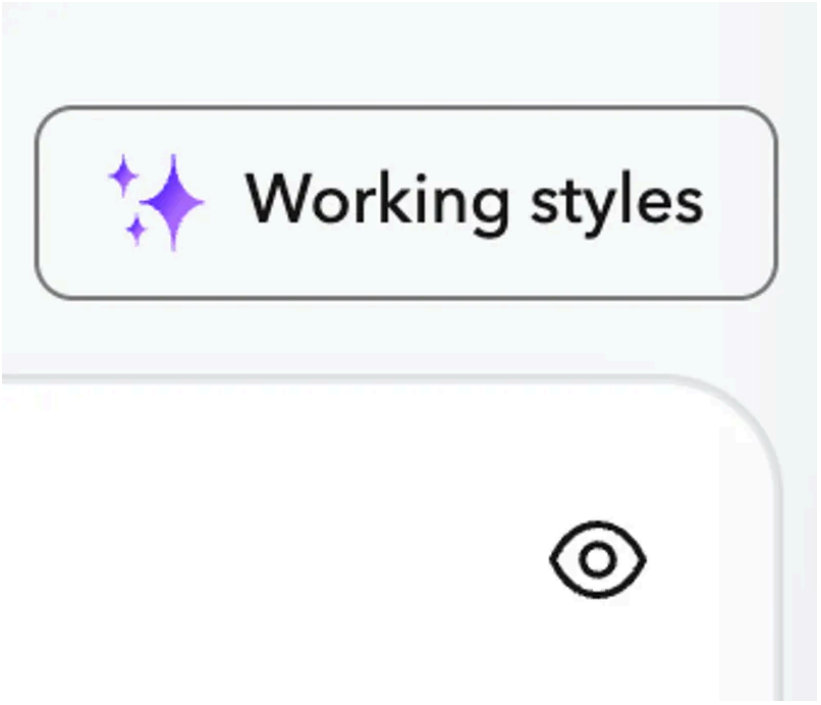
Dashboard Analysis & Insights (All Modules)

Analyze trends and surface insights across your org.



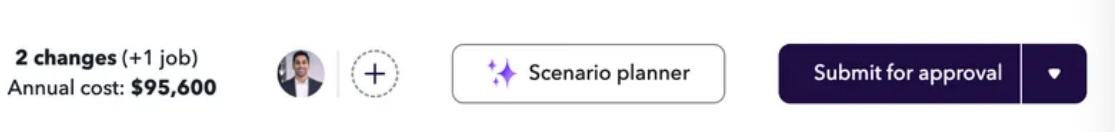
What we have in common (All Modules)

Compare what team members have in common using AI analysis.



Working styles (Performance Module)

Understand team dynamics and working styles to better support employee success.



Scenario planner (Headcount Planning Module)

Create and analyze endless headcount scenarios with ease.

Read more at **AI Scenario Planner**

Ask ChartHop

HRIS customers get access to the open ended, Ask ChartHop chat.

Ask ChartHop is great for:

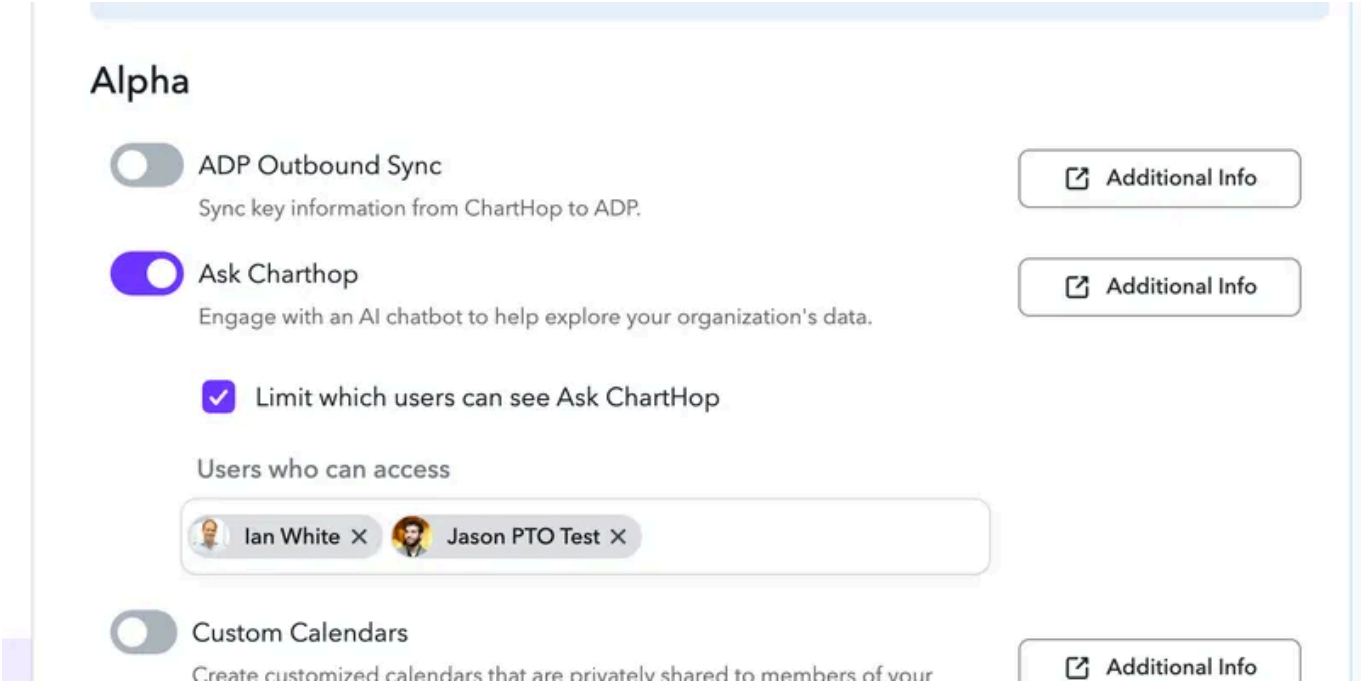
1. Common employee questions - *"What's our sick day policy?"* pulling data from your Resources pages.
2. People Ops-related questions - using any existing job, people, engagement, or performance data you have in ChartHop
3. Data search type questions - "How many employees do we have who live within a 2 hour drive of San Francisco?"

For additional information and examples see **Ask ChartHop**.

How to set up ChartHop AI

Contact ChartHop Support or your CSM to activate the feature.

You may limit access to Ask ChartHop to specific people. Please inform your CSM about who you would like to have access to try during the beta period.



Important details

Data Access

Ask ChartHop will only use information that you have access to based on your access role and permissions.

- For example, if you asked: *"What is the average age of the employees?"* but don't have access to anyone's birthday other than your own it will answer with something like: "*I apologize, but it seems that the age data is not available for most employees in the system. Only one employee's age is shown in the results, which is not enough to calculate an accurate average age for the entire company.*"

Currently Ask ChartHop primarily uses Field data. So data stored in other locations such as Form Responses or Resources may not be accessed at this time.

Data Security & Training

Our AI model does not export any of your organization's data or any employee's data.

Your organizations data is not used to train or improve the AI model.

Accuracy and Hallucinations

AI models like the one used by Ask ChartHop can at times hallucinate and produce inaccurate information in responses.

We have put in guardrails and training to improve the accuracy and reduce any hallucination.

It's important for you to review and verify any responses that you receive. This is one of the reasons that Ask ChartHop will often pull up a data sheet so that you can verify the information.

There are a few steps that you can take to improve the accuracy of your responses:

1. Ensure all of your **Creating custom fields** are intuitively named and also include descriptive descriptions such as "Performance Rating 2024 - Contains the rating an employee received as part of their annual performance review process conducted in August of 2024."
2. **Fields** that are not in use at your organization.

Observability

Any questions you Ask ChartHop can be reviewed by both the ChartHop team and your organization's administrators.

More information on Admin Observability tools coming soon.

Pricing

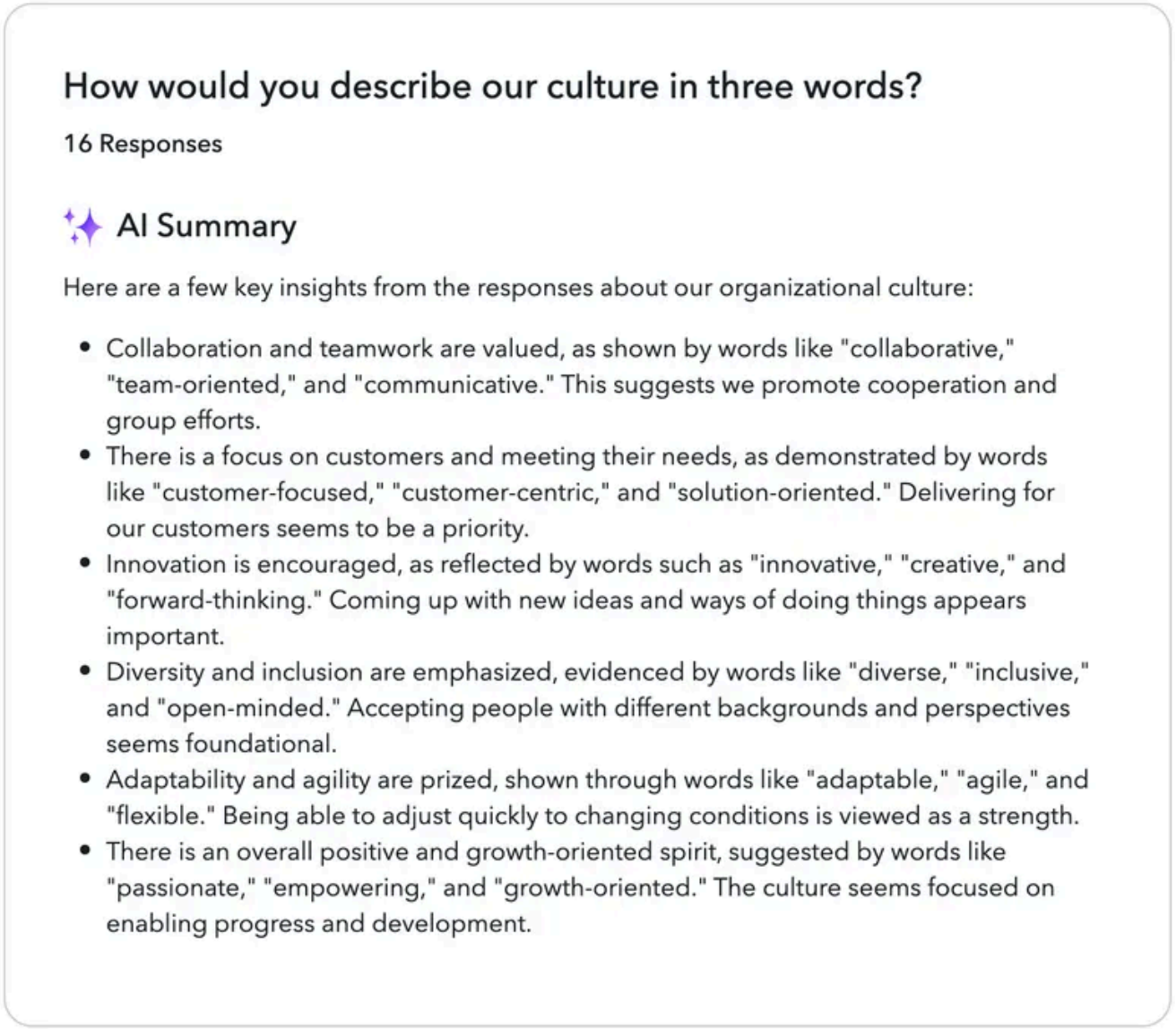
Access to ChartHop AI is dependent on your current plan and module.

6.1. AI Summaries

AI Summaries in Surveys, Reviews & Forms

AI Summaries will be displayed in the Responses Tab for an Short Text or Long Text question in a form or a form used in a Survey or Review.

Example use case: Summaries of open text responses in an Engagement Survey



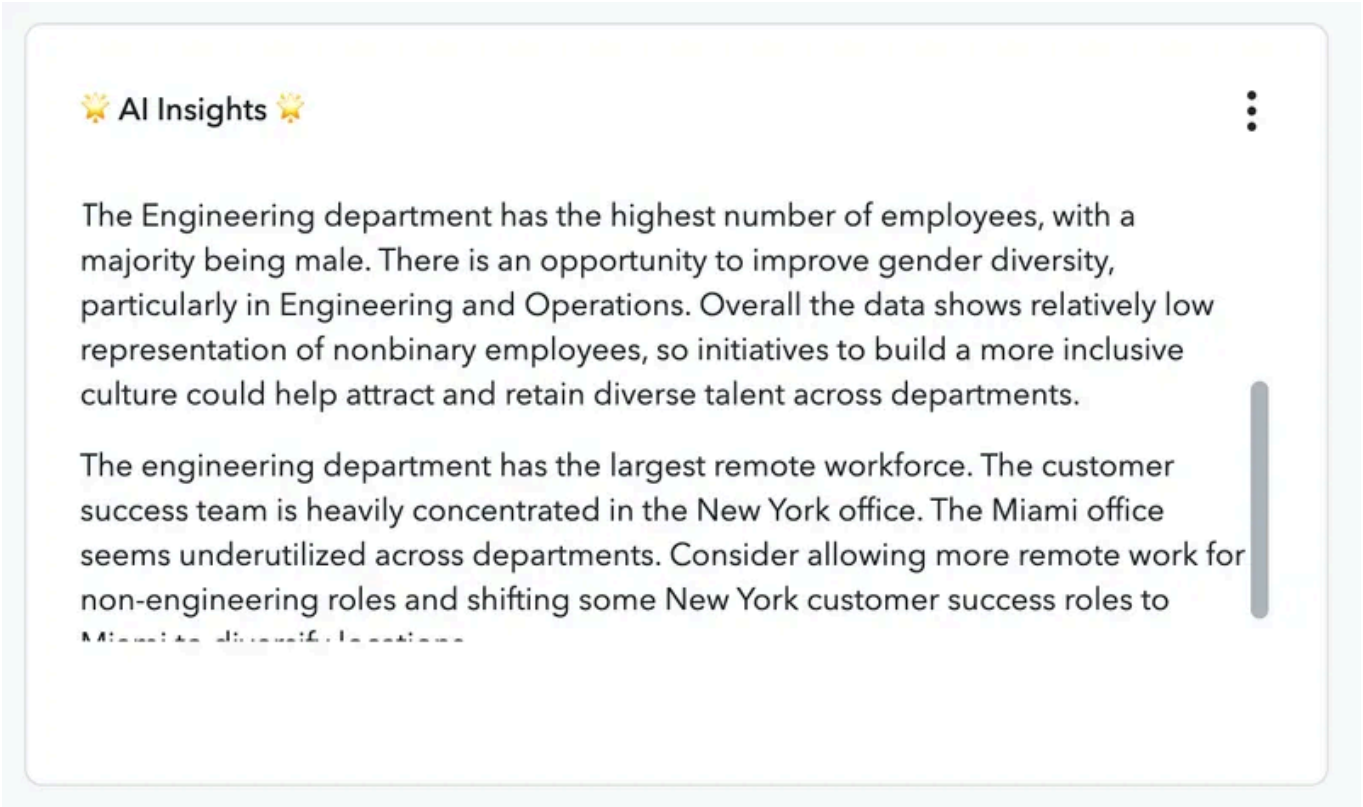
AI Summary of Employee Engagement Survey

AI Insights of Charts in Dashboards

A text-based AI Summaries can be created about any chart.

After activating the feature, please contact the ChartHop team to get this setup.

Example use case: Summary of demographic data for a company over time.



AI Insights of forms sent over Slack or Email

Using ChartHop Actions, you can create a message that contains a summary of form data.

After activating the feature, please contact the ChartHop team to get this setup.

Example use case: Send a summary of pulse check questions from across the company

A note about using AI

AI Summaries are an early access features using the state of the art of generative AI. We acknowledge that the summaries generated by ChartHop AI an include hallucinations and mistakes. These insights are not a substitute for human decision-making and should be reviewed alongside the source data which is also availible to you in ChartHop.

See **ChartHop AI** for additional details.

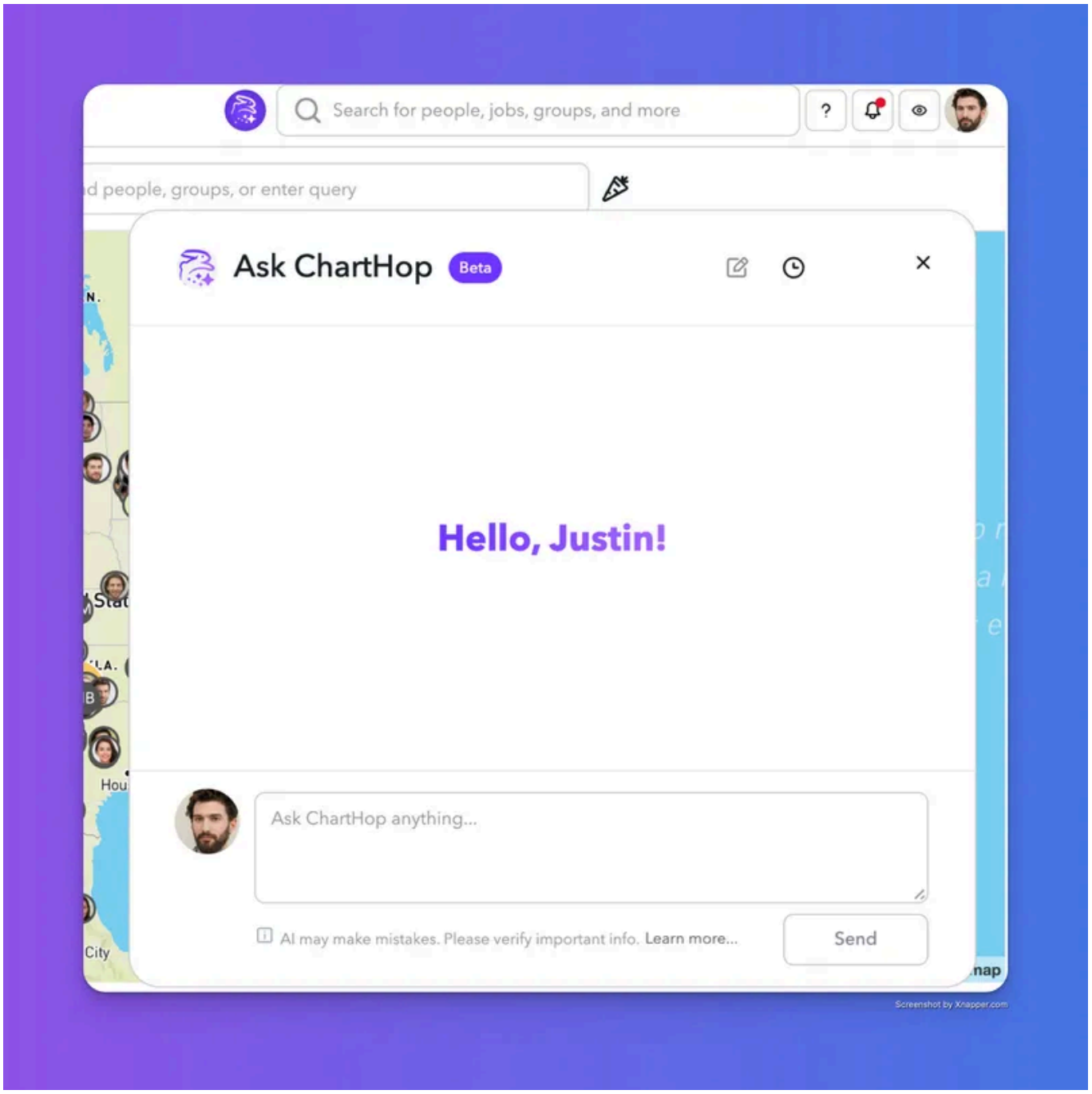
6.2. Ask ChartHop

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Ask ChartHop



Ask ChartHop

All customers get access to the open ended, Ask ChartHop chat. You can ask ChartHop any People Ops-related question and get instant answers using your existing people data along with data from Resources.

How Ask ChartHop works

Ask ChartHop allows you to ask questions in your natural language like:

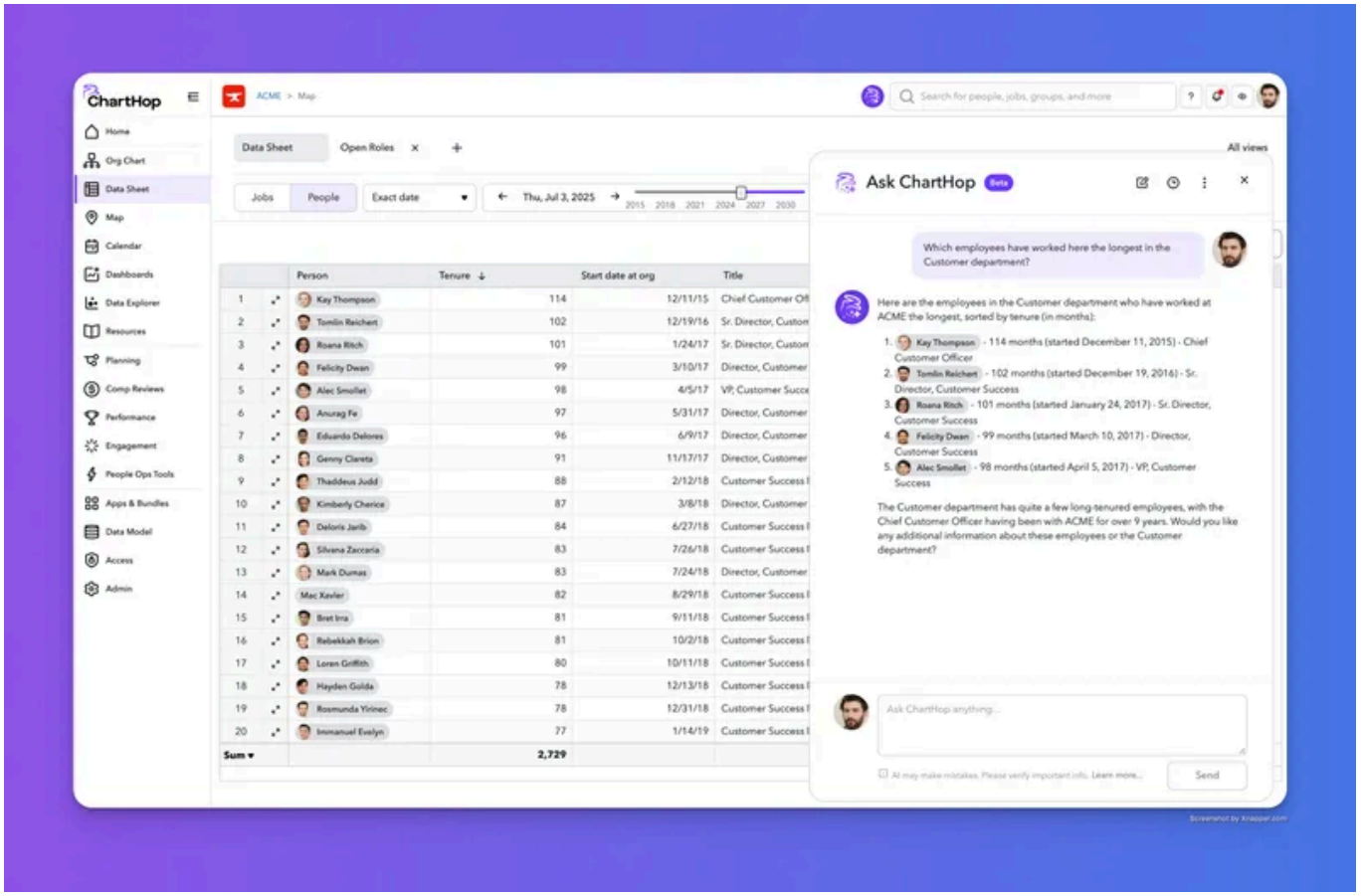
- *"Who are the longest tenured employees in the Customer department?"*

- *"Can you give me a list of all of the people in who were rated "Outstanding" on their last performance review?"*
- *"Who is the HRBP for Alex Stephens?"*
- *"How many employees home address is within a 2 hour drive of Chicago?"*
- *"Which of our current and former employees from the past year live in California?"*
- *"What holidays does the company have in 2025?"*

It will then use AI to generate an answer. That answer will take the form of:

- A response in the chat
- A **Data Sheet** with the proper filters, columns and date ranges.
- A **Calendar View** with proper calendars, filtering and date ranges.

After your initial question, you can continue chatting to refine the answer or use the ChartHop screen to refine your answer.

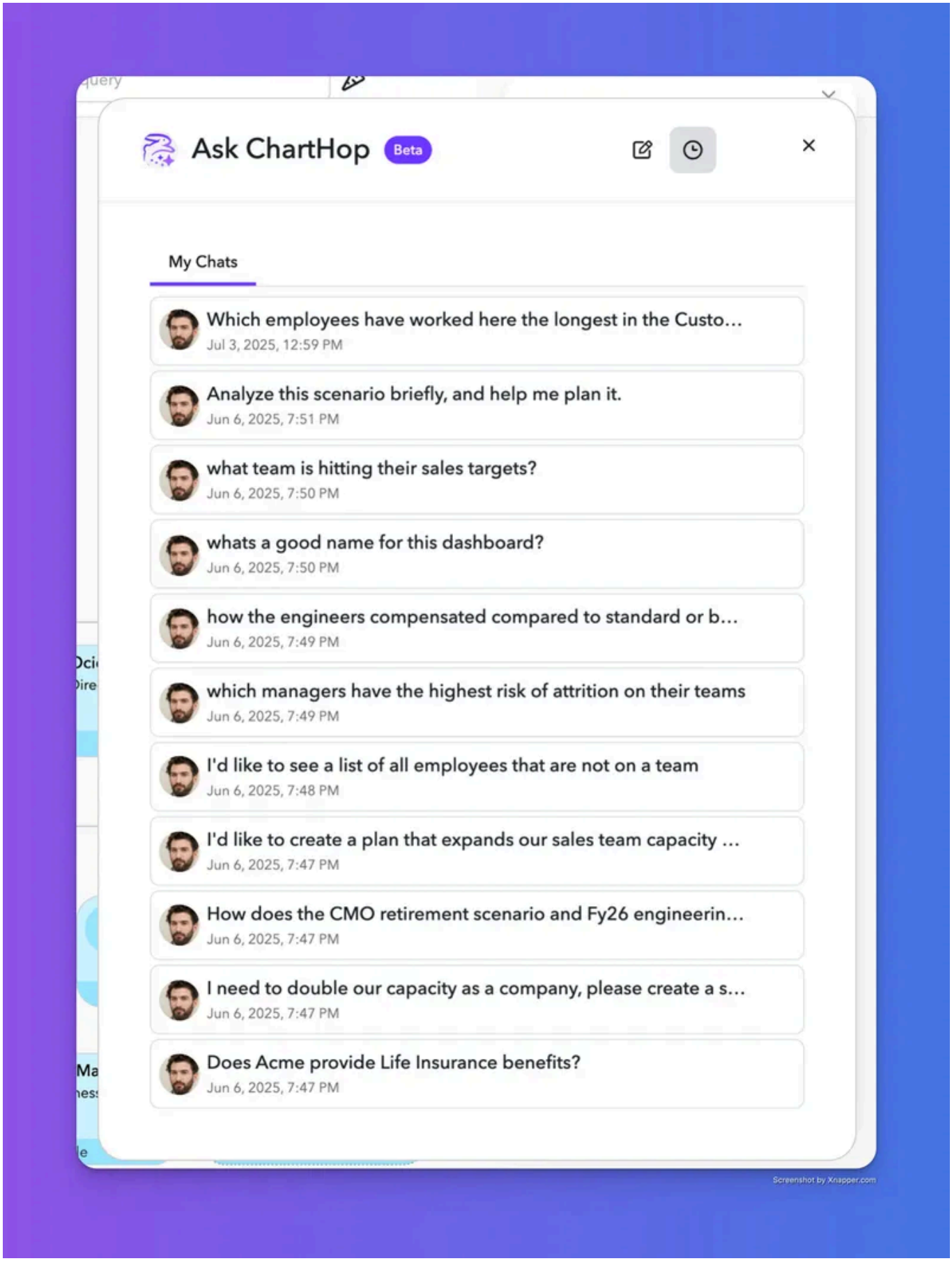


Try Ask ChartHop with business data using Tables

Ask ChartHop allows you to ask business questions in your natural language like:

- *"How is the company performing so far this quarter against our goals?"*

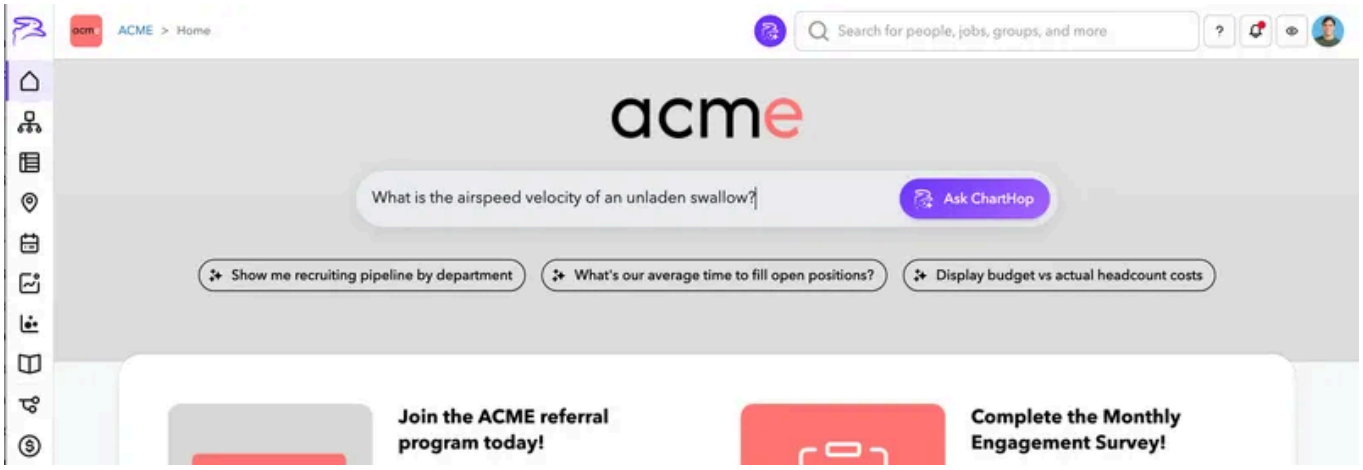
- *"Which retail locations have the highest turnover and what might some contributing factors?"*


Ask ChartHop
Beta
My Chats
Which employees have worked here the longest in the Custo...
Jul 3, 2025, 12:59 PM
Analyze this scenario briefly, and help me plan it.
Jun 6, 2025, 7:51 PM
what team is hitting their sales targets?
Jun 6, 2025, 7:50 PM
whats a good name for this dashboard?
Jun 6, 2025, 7:50 PM
how the engineers compensated compared to standard or b...
Jun 6, 2025, 7:49 PM
which managers have the highest risk of attrition on their teams
Jun 6, 2025, 7:49 PM
I'd like to see a list of all employees that are not on a team
Jun 6, 2025, 7:48 PM
I'd like to create a plan that expands our sales team capacity ...
Jun 6, 2025, 7:47 PM
How does the CMO retirement scenario and Fy26 engineerin...
Jun 6, 2025, 7:47 PM
I need to double our capacity as a company, please create a s...
Jun 6, 2025, 7:47 PM
Does Acme provide Life Insurance benefits?
Jun 6, 2025, 7:47 PM
Screenshot by Xnapper.com

History

Ask ChartHop includes a History button. Clicking it will show a list of previous Ask ChartHop chats.

- The hover activated menu to the right of each Ask ChartHop Chat will allow you to:
  - Rename a Chat
  - Delete a Chat
- The edit button next to the History button will let you start a new Chat



Ask ChartHop on the home page

Ask ChartHop can be optionally added as a primary feature on the home page for users with access to Ask ChartHop. It will display a search bar that acts as an entry point to the Ask ChartHop chat window and AI-generated suggested prompts. The AI-generated suggested prompts are custom to each person and what data they have access to and will regenerate occasionally.

To turn on Ask ChartHop on the home page:

1. Navigate to **Admin > AI**
2. Toggle on "**Ask ChartHop on Home Page**"

6.3. AI Agent Memory

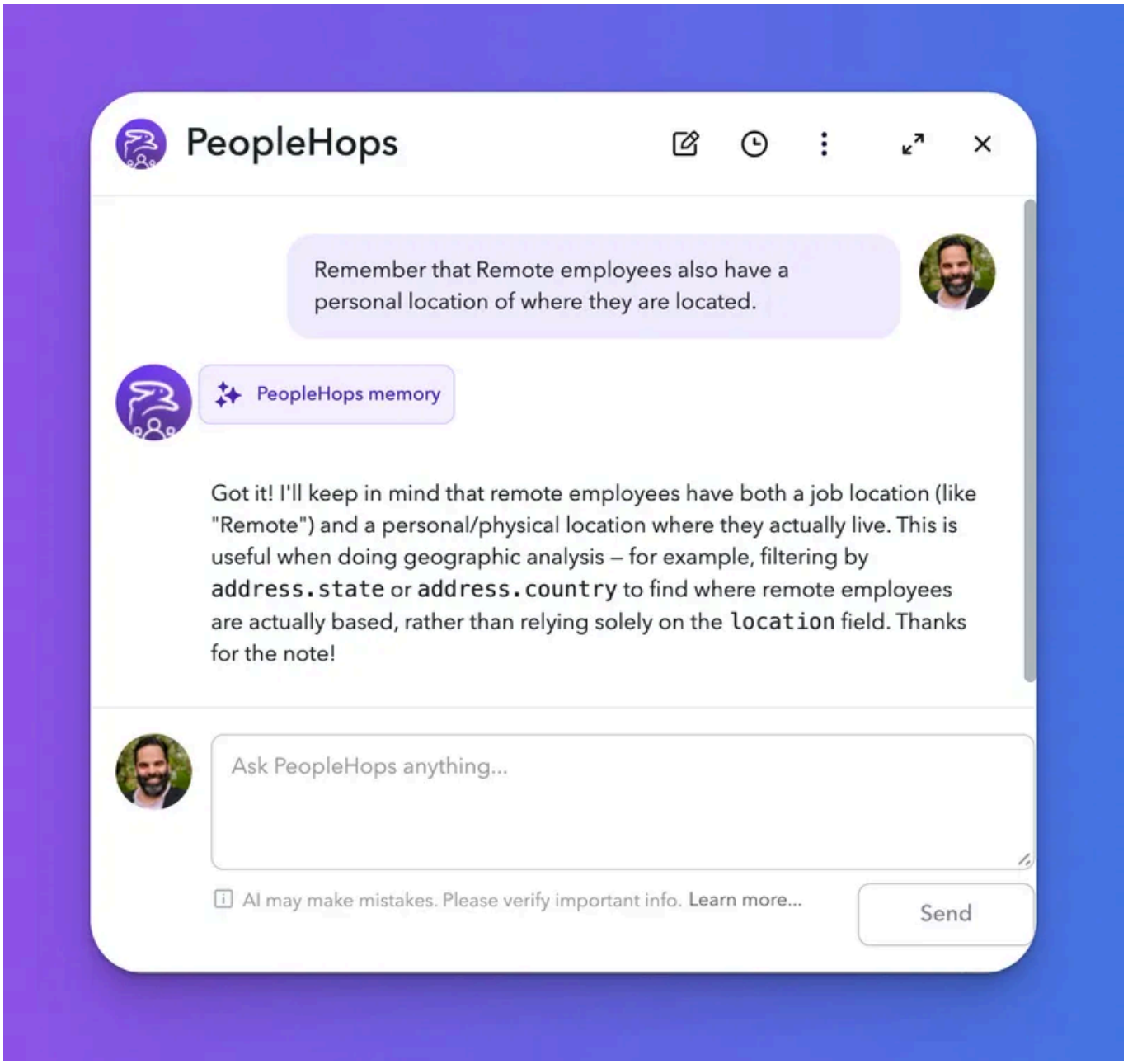
Status: Alpha (AI Pro)

AI Agent Memory allows ChartHop's AI to retain context and learned preferences across conversations. Without memory, each chat session starts fresh. With memory enabled, the AI can remember facts, preferences, and context from prior interactions — making it progressively more useful over time.

AI Agent memory works on the default ChartHop AI agent as well as custom agents as part of the AI Pro package.

Enabling AI Agent Memory

1. Navigate to **Admin > AI**
2. Ensure **AI Features** is enabled
3. In the **AI Pro** section, toggle on **AI Agent Memory**
4. Click **Save Settings**



How It Works

When AI Agent Memory is enabled, the AI can store and recall information between sessions. This may include:

- Preferences expressed by a user during conversation (e.g., preferred report formats or filters)
- Context established in prior sessions that is relevant to a new question
- Organizational knowledge surfaced during previous interactions

Memories are scoped to the user and organization, and do not cross organizational boundaries.

Privacy Considerations

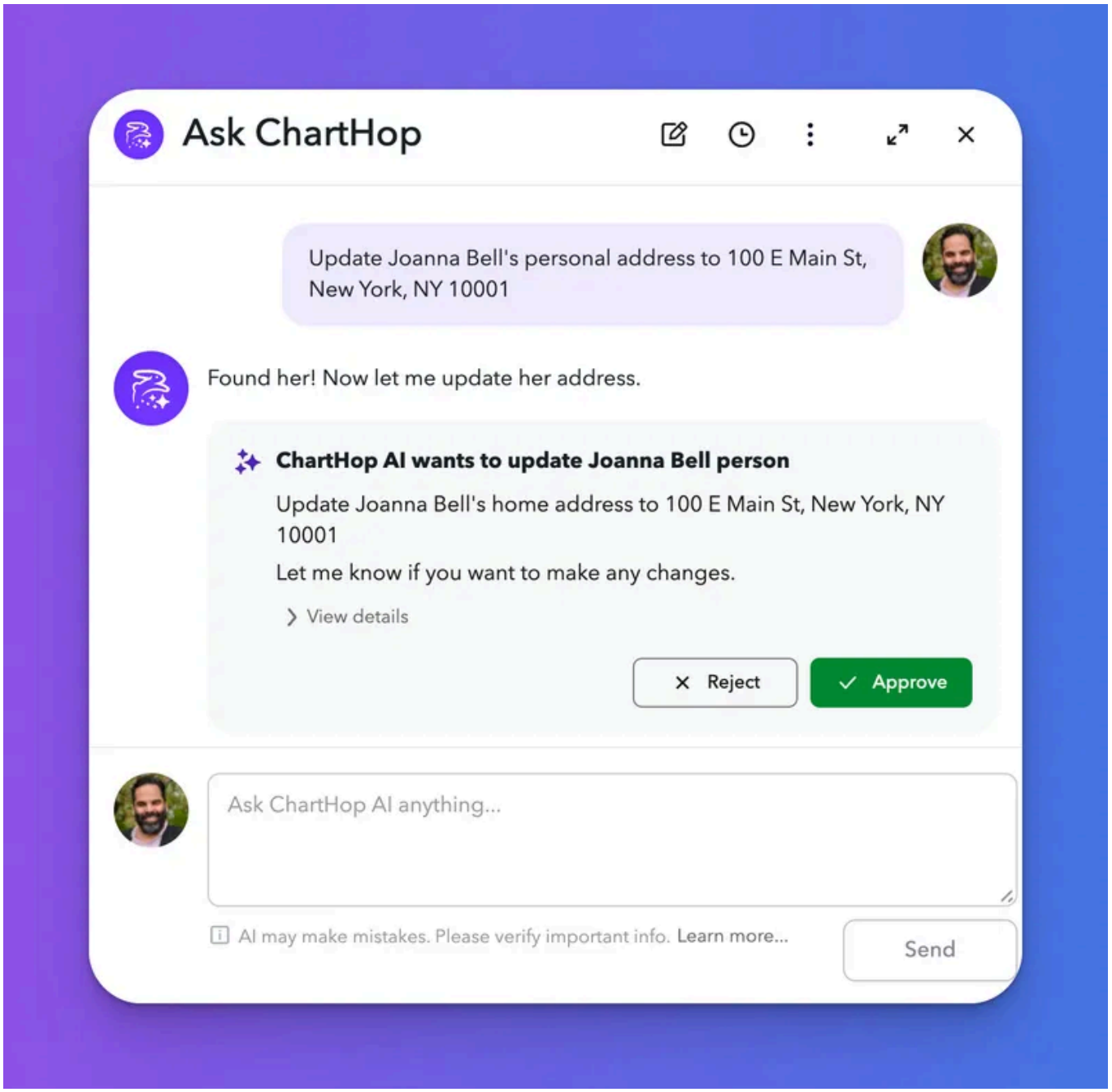
AI Agent Memory stores information tied to individual users and org-level context. Admins should review their organization's data handling policies before enabling this feature. Memory contents can be cleared at the user or org level as needed.

6.4. AI Chat Write Actions

AI Chat Write Actions enables the AI to make changes to your organization's data directly from a chat conversation. Rather than navigating to a profile or data sheet to make an update, users with the appropriate permissions can ask the AI to make changes on their behalf — and the AI will propose and execute those changes inline.

Enabling AI Chat Write Actions

1. Navigate to **Admin > AI**
2. Ensure **AI Features** is enabled
3. In the **AI Pro** section, toggle on **AI Chat Write Actions**
4. Click **Save Settings**



Chat Write Actions

How It Works

When AI Chat Write Actions is enabled, the AI can propose and apply updates to ChartHop data based on a user's natural language request. Before any change is applied, the AI will present a summary of the proposed update for confirmation. Changes are only made after explicit user approval.

Examples of what AI Chat Write Actions can do:

- Update a job title or department for an employee
- Change a field value on a person's profile

- Apply a set of changes described in plain language
- Create a Dashboard
- Create a Goal
- Assign a Task
- (more capabilities soon!)

Permissions & Access Control

AI Chat Write Actions respects ChartHop's existing permission model. The AI can only make changes that the logged-in user is already authorized to make. It will not bypass field-level or role-based access controls.

6.5. AI Scenario Planner

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

AI Scenario planner

Planning Module customers can user the Scenario planner button to create and analyze scenarios.



How to use the AI Scenario planner

1. Create a new **Custom Scenario**.
2. Click the ✨ **Scenario planner** button to launch the chat window.
3. Write a prompt about the scenario that you would like to create.

Example prompts for scenario building

- Add two new L2 engineers one on the front end team and one on the back end team to work on the new AI project.
- Petra Kinney is leaving on 5/22. Can you create a backfill for them and move all of their direct reports to under Ibrahim Andrews.
- Using a typical ratio for Sales manager to AEs to BDRs build out a sales team that can sell $1M in product a quarter.

6.6. AI Pro

ChartHop's AI capabilities are split into two tiers: **ChartHop AI** features, available to all organizations with the AI module, and **AI Pro features**, a set of advanced agentic capabilities currently in pre-release and available to select organizations.

AI Pro Features

The following features are part of the **AI Pro (Pre-Release)** tier. They appear in the bottom section of **Admin > AI**.

> **Note:** AI Pro features require the base **AI Features** toggle to be enabled. Navigate to **Admin > AI** and ensure *AI Features* is toggled on before enabling any AI Pro features.

1. **AI Agentic Actions** - Enable AI to trigger automated workflows and actions.
2. **AI Agents** - Deploy AI agents that can take actions on your behalf within ChartHop. When enabled, you can select a **Default AI Agent** and configure agent settings, including memory.
3. **AI Form Completion** - Use AI to assist with form completion and response summarization.

Enabling AI Pro Features

1. Navigate to **Admin > AI**
2. Ensure **AI Features** is toggled on
3. Scroll to the **AI Pro (Pre-Release)** section at the bottom of the page
4. Toggle on the specific AI Pro feature(s) you want to enable
5. Click **Save Settings**

> AI Pro features are in active development. Behavior and availability may change before general release.

6.6.1. AI Agents

Status: Alpha (AI Pro)

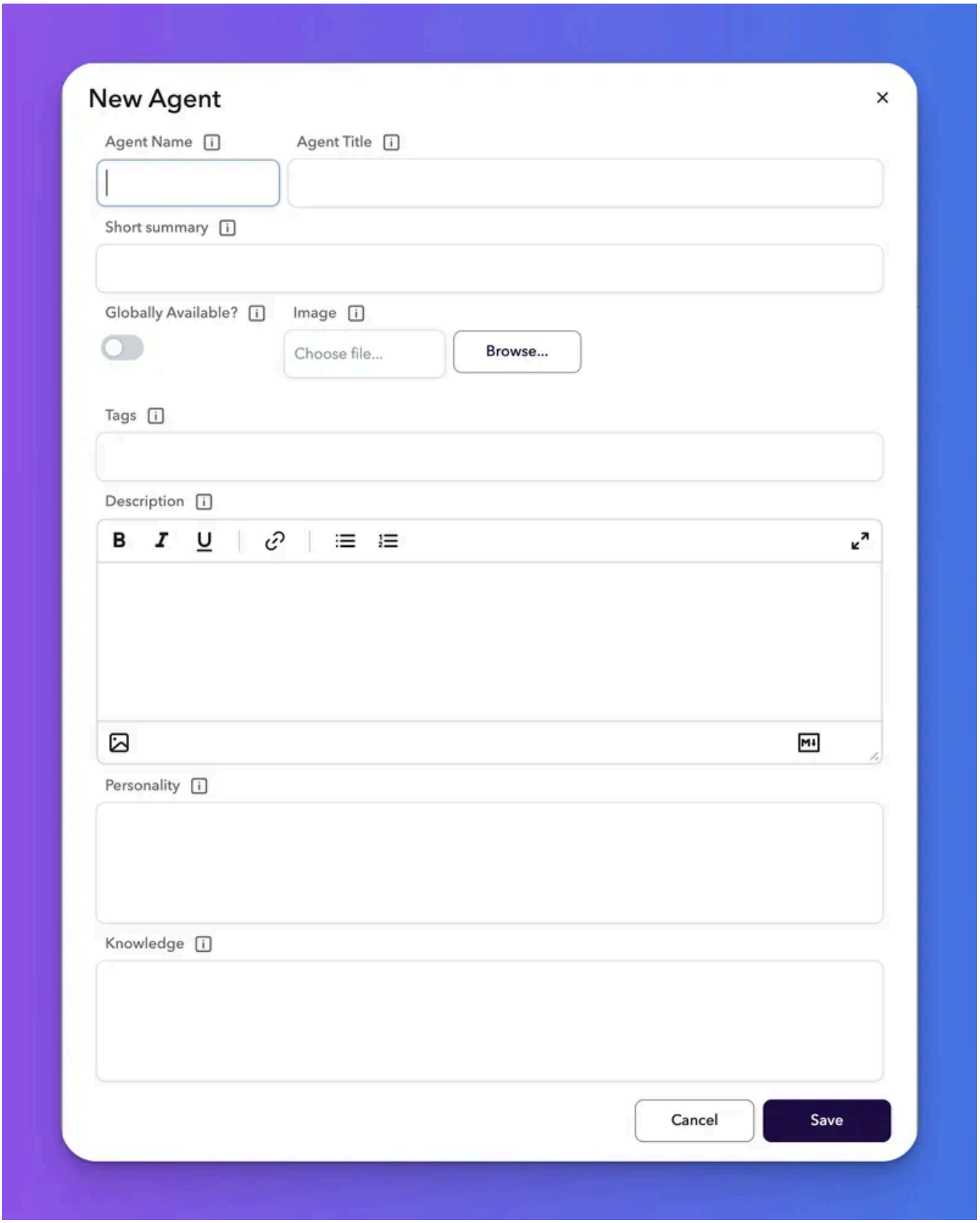
AI Agents are autonomous AI assistants that can be configured to take actions within ChartHop on behalf of your organization. Rather than simply answering questions, agents can be given a specific identity, set of instructions, and a defined scope of permissions — enabling them to perform multi-step tasks, answer questions using live org data, and execute automated workflows.

Agents are managed from **Admin > Agents**.

Enabling AI Agents

1. Navigate to **Admin > AI**
2. Ensure **AI Features** is toggled on
3. In the **AI Pro** section, toggle on **AI Agents**
4. Click **Save Settings**

Once enabled, a **Default Agent** selector appears, letting you choose which agent users see by default when they open the AI chat.



Create Agent

Creating an Agent

Agents are created from **Admin > Agents** using the **New Agent** button. The create/edit dialog contains the following fields:

Identity

Field	Description
Name	A unique internal identifier for the agent (required). Used in URLs and API references.
Title	The display name shown to users (required).
Short Summary	A one-line description of what the agent does (required). Shown in agent listings.
Image	An optional avatar image for the agent.
Tags	Comma-separated tags to help categorize or filter agents.
Description	A rich-text longer description of the agent's purpose, shown on the agent's detail page.

Behavior

Field	Description
Personality	Defines the agent's tone, communication style, and persona (required). For example: *"You are a friendly, concise HR assistant who specializes in compensation questions."*
Knowledge	Background information the agent should have — facts about the organization, common terminology, or domain-specific context it should apply when answering questions.
Instructions	Step-by-step or rule-based directives that tell the agent how to behave, what workflows to follow, and what actions to take in specific situations. This is the primary way to define the agent's operational behavior.
Guardrails	Constraints on what the agent should *not* do. Use this to prevent the agent from discussing off-topic subjects, making certain kinds of recommendations, or overstepping its intended scope.
Enable Memory	When toggled on, the agent will remember context from previous conversations with each user. See **AI Memory** for more detail.

Slack Configuration

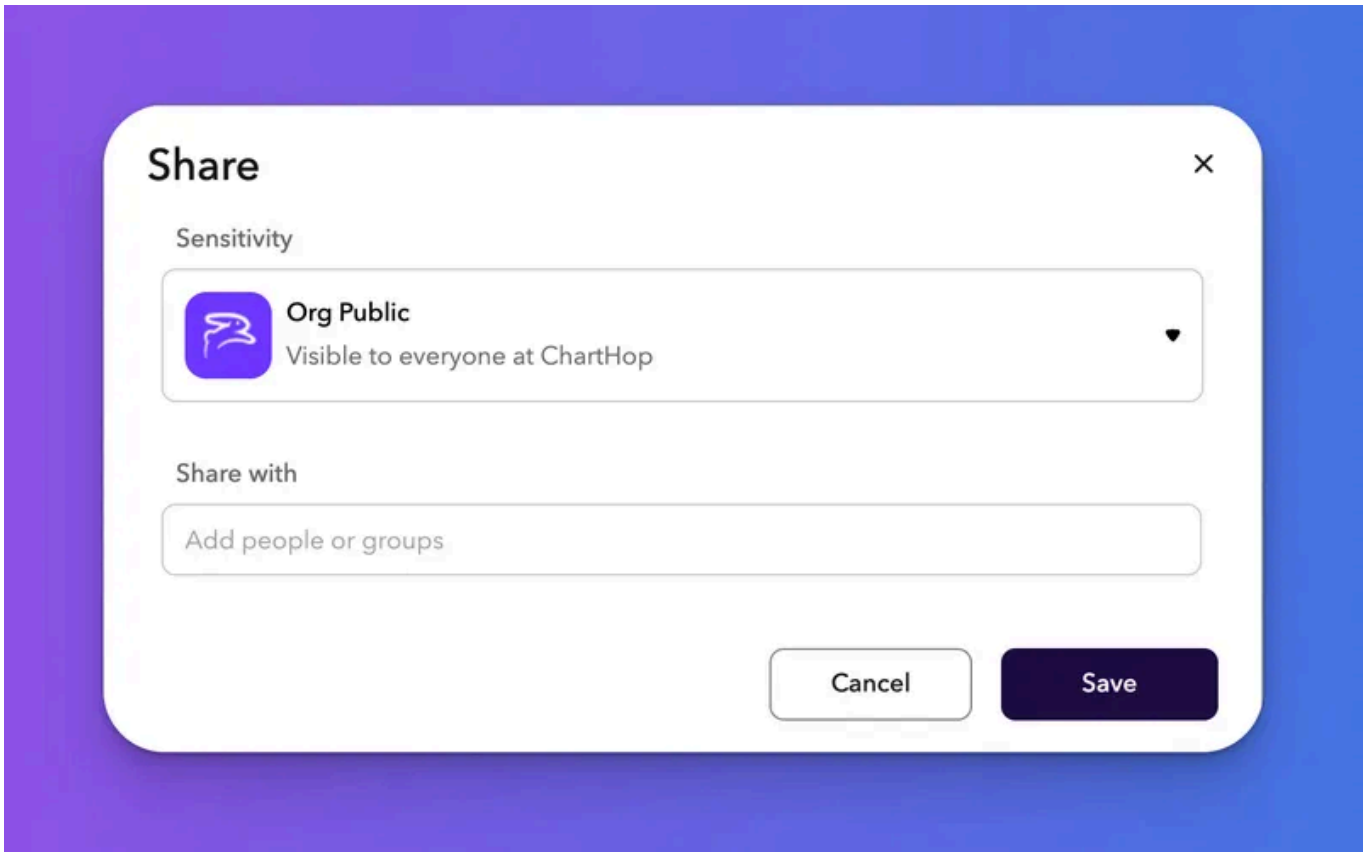
Agents can optionally be connected to a Slack workspace, allowing the agent to be messaged directly in Slack. The following credentials from your Slack App configuration are required:

Field	Description
Slack App ID	The unique identifier for your Slack app (e.g. `A012345678`). Found in your Slack app's Basic Information page.
Slack Client ID	The OAuth client ID for your Slack app.
Slack Client Secret	The OAuth client secret. Stored securely and not displayed after saving.
Slack Signing Secret	Used to verify that incoming requests come from Slack. Stored securely.

After saving, the agent must be connected to a Slack workspace from the **Messaging** tab (see below).

Managing an Agent

Once created and installed, the agent detail page has four tabs: **Configure**, **Tools & Permissions**, **Actions**, and **Messaging**.



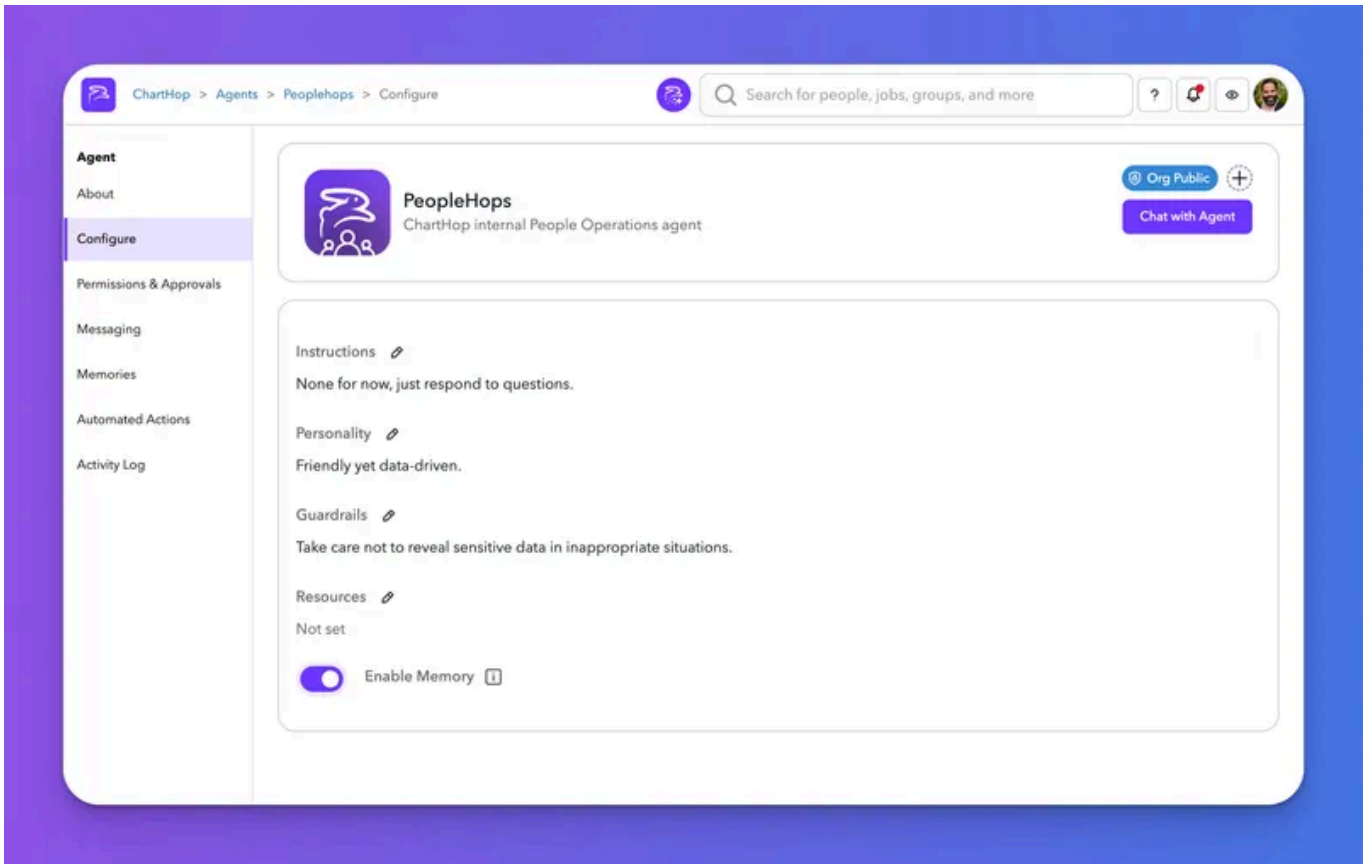
Share

Sharing an Agent

Installed agents can be shared with other users in your organization using the **sharing controls** in the agent header. You can:

- Grant access to specific users or groups
- Set the agent's **sensitivity level** (Org-wide or High sensitivity) to control who can view and interact with it

Sharing is managed via the standard ChartHop sharing interface on the agent detail page.



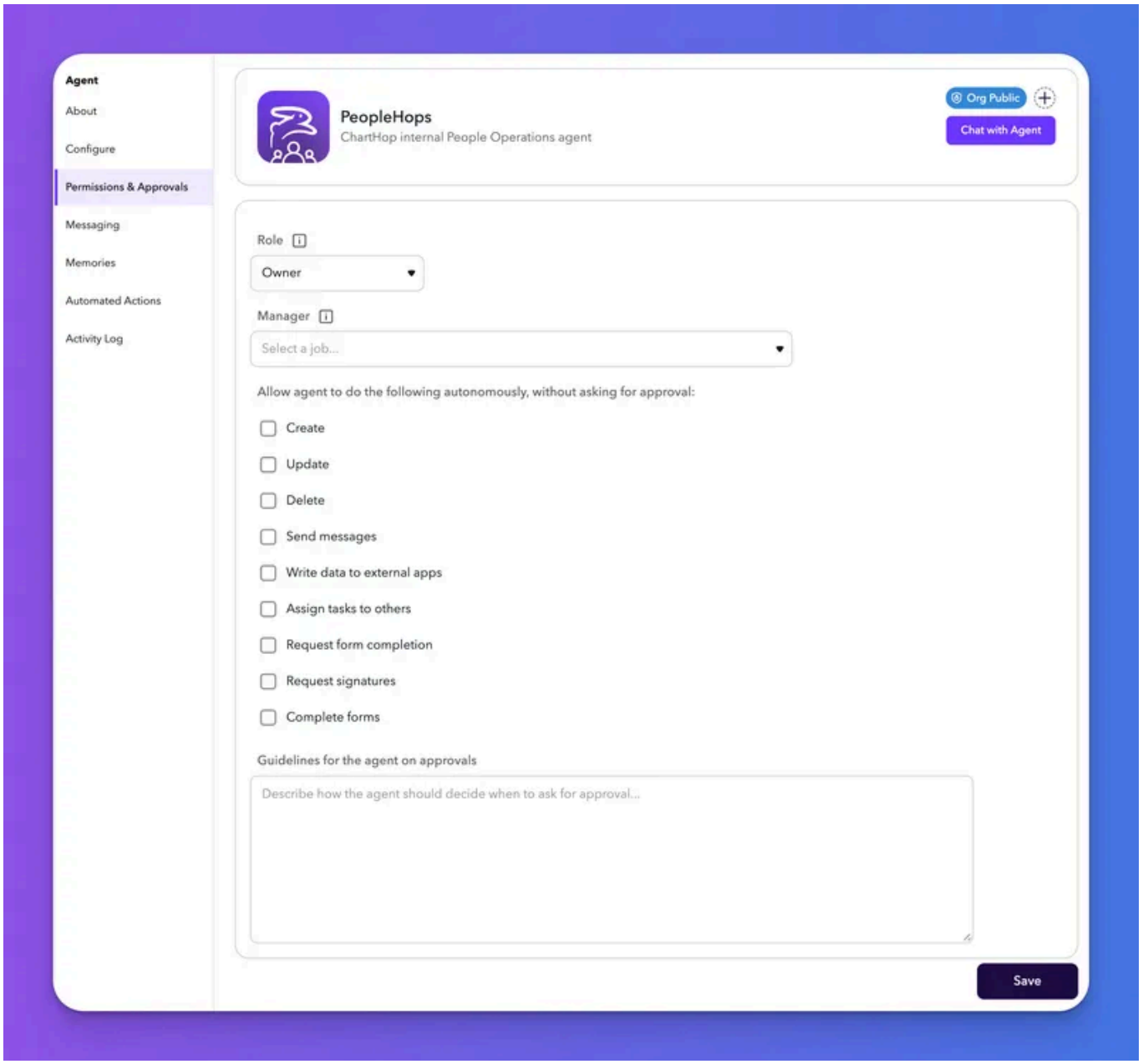
Configure

Configure Tab

The Configure tab lets you adjust the agent's core behavioral settings after creation. These fields mirror the behavior fields from the create dialog, and can be edited inline:

Field	Description
Instructions	The agent's operational directives. Edit to refine how the agent responds and what tasks it performs.
Personality	The agent's tone and communication style.
Guardrails	Constraints on what the agent should avoid doing or saying.
Resources	One or more ChartHop Resource pages (from the Resources section) that the agent should use as a knowledge base. Attaching resources gives the agent grounded, org-specific context to draw from when answering questions.
Enable Memory	Toggle to enable or disable cross-session memory for this agent.

Note on overrides: If an agent is installed to your org from an external source, the Configure tab shows the *effective* configuration — which may be a combination of the app-level defaults and any org-level overrides you have set.

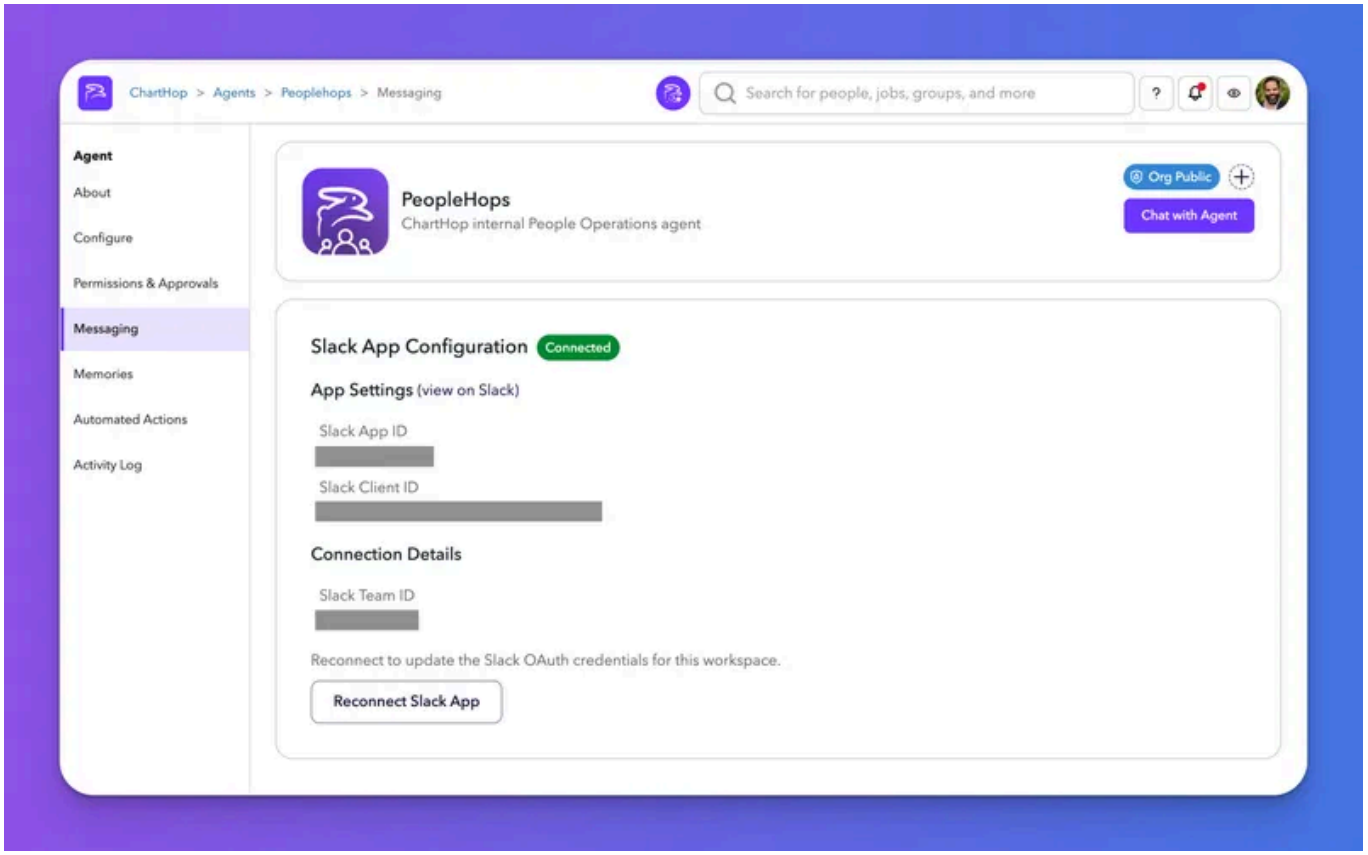


Permissions & Approvals

Permissions & Approvals Tab

This tab controls what the agent is *allowed to do* within ChartHop — its identity in the system, who oversees it, and which actions it can take autonomously.

Field	Description
Role	The ChartHop role assigned to this agent. This determines what data the agent can read and what changes it is permitted to make. Choose the minimum role required for the agent's intended tasks.
Manager	An optional job in the org chart designated as the agent's "manager" — the person responsible for overseeing and approving the agent's actions.
Autonomous Actions	A list of policy rules defining which actions the agent is permitted to take *without* requiring human approval. Each rule specifies a type of action (e.g. reading a field, creating a record) and the scope it applies to. Actions not covered by these rules will require approval before execution.
Approval Guidelines	Free-text instructions that help the agent understand *how* to seek approval when it needs to take an action outside its autonomous permissions. For example: *"When uncertain, always message the manager for approval before proceeding."*



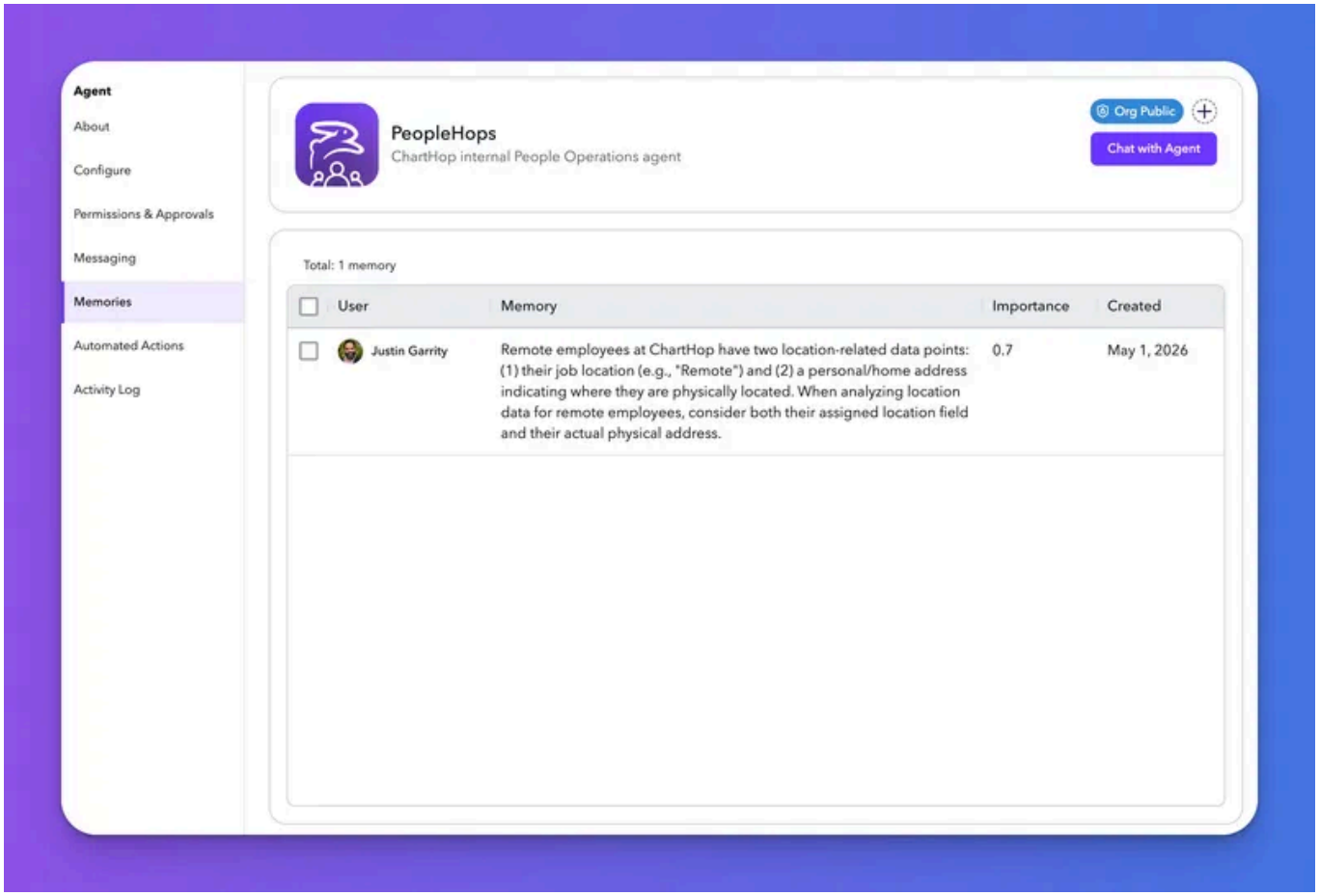
Messaging

Messaging Tab

The Messaging tab shows the agent's Slack integration status and connection details.

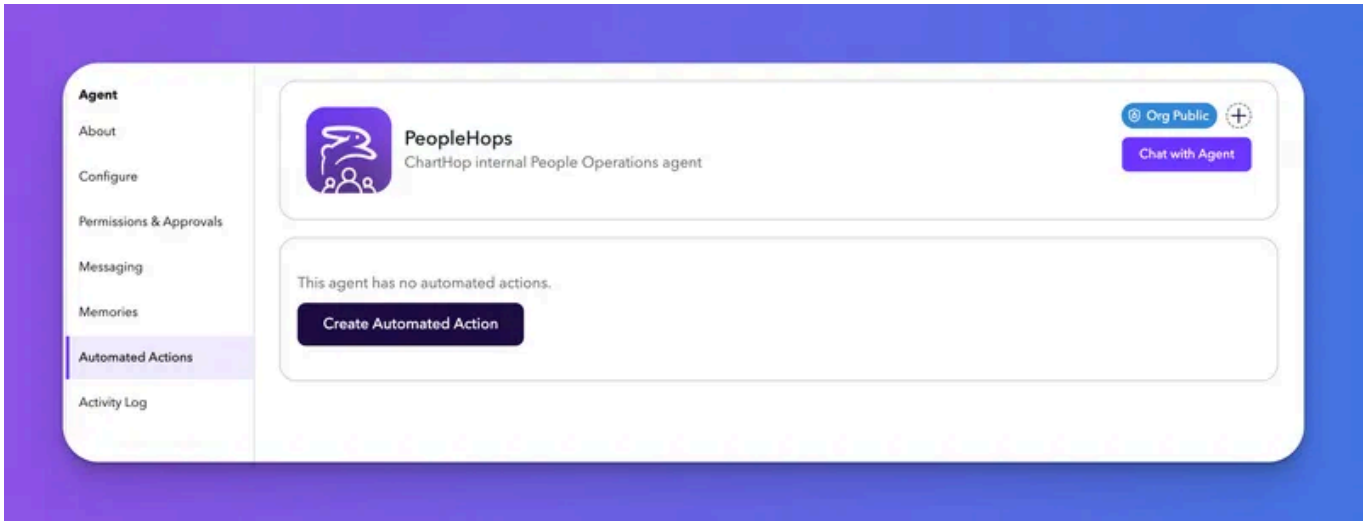
Section	Description
Slack Config	Displays the Slack App ID and Client ID configured for this agent. A link to the app's settings page on api.slack.com is provided if an App ID is set.
Connection Status	Shows whether the agent is currently **Connected** or **Not Connected** to a Slack workspace.
Connection Details	When connected, displays the Slack Team ID and Bot User ID for the active connection.
Connect / Reconnect	An OAuth button to initiate or re-authorize the Slack connection for this agent.

```
The Messaging tab is only shown after the agent has been installed. Slack credentials must first be added via the create/edit dialog before a connection can be established.
```



Memories Tab

The Memories tab shows the list of memories that have been saved to the agent, who made the change, how important it is scored, and when the memory was created. Selecting a Memory allows you to delete it.



Automated Actions

Automated Actions Tab

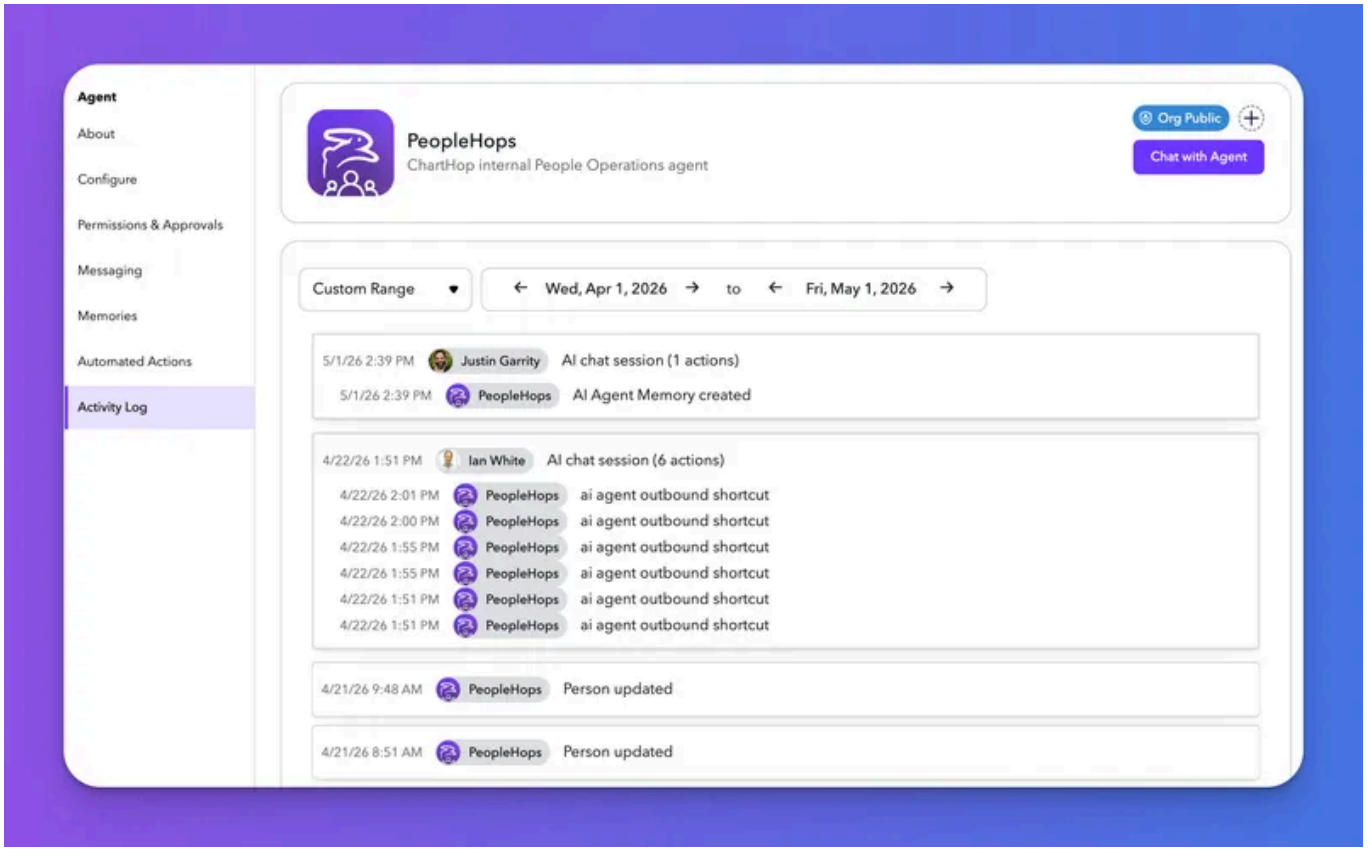
The Actions tab shows all ChartHop Actions that have been associated with this agent. These are automated workflows the agent can trigger as part of its responses.

Each action in the list shows:

- **Active toggle** — Enable or disable the action without deleting it
- **Description** — A link to the action's detail/edit view
- **Trigger** — The event or schedule that fires the action
- **Run As** — The user identity under which the action executes
- **Last Updated** — When the action was last modified

From this tab you can **create** new actions, **edit** existing ones, **duplicate** an action, **run** an action manually for testing, or **delete** actions.

```
Actions associated with an agent are scoped to that agent and appear here for easy management. They can also be managed from Admin > Actions.
```



Activity Log Tab

The Activity Log shows all the activity related to the agent in reverse chronological order.

```
AI Agents is an alpha feature and is subject to change. Access is limited to organizations with AI Pro enabled.
```

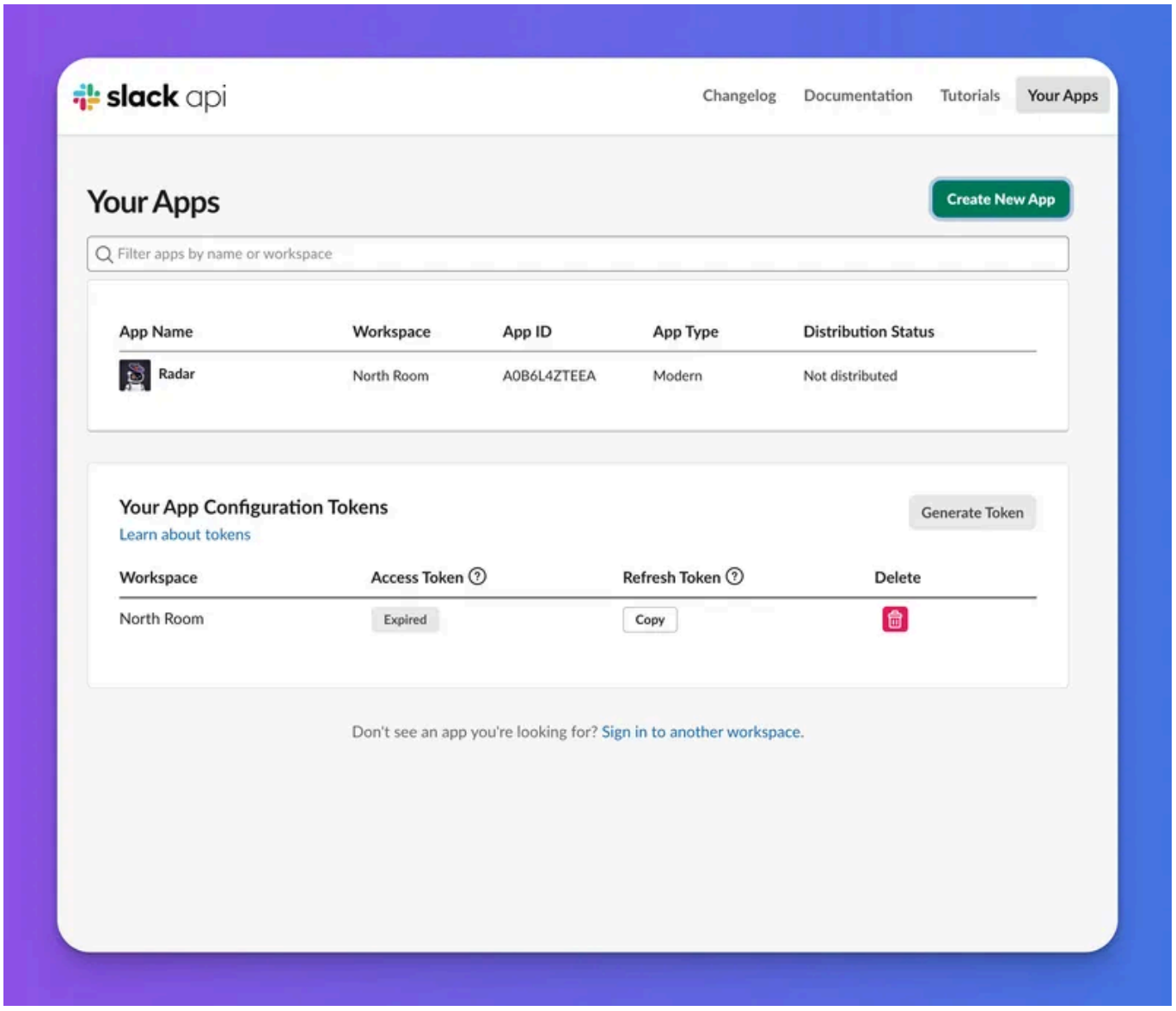
6.6.1.1. Connecting a Custom Agent to Slack

This guide walks through setting up a custom ChartHop agent in Slack. These steps apply to any custom ChartHop agent.

Note: While ChartHop's official Slack App Store listing is pending approval, this is also the way to set up the ChartHop agent in the meantime.

Step 1: Create a Custom App in Slack

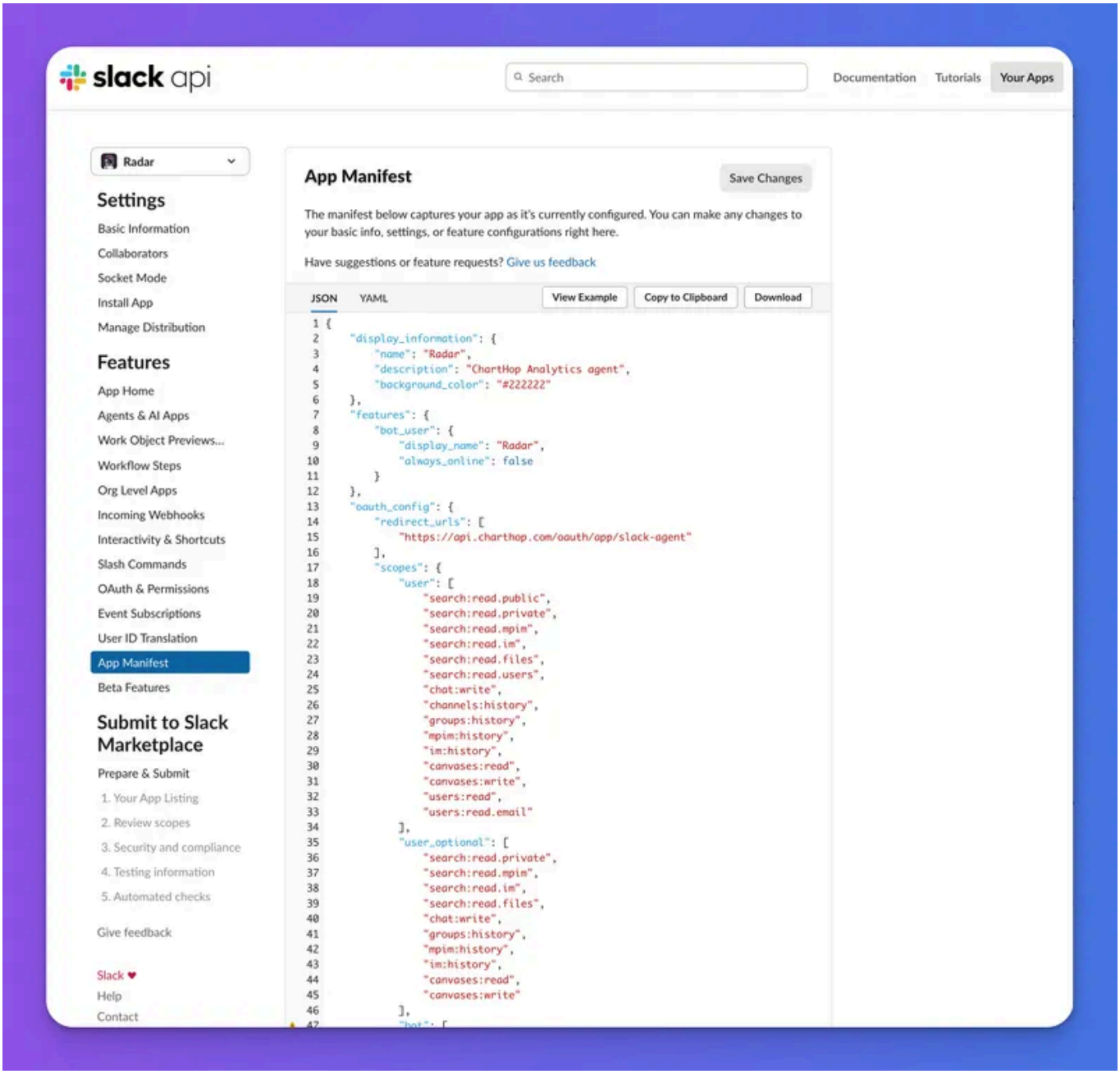
The custom Slack app acts as the conduit between Slack and your custom ChartHop agent passing messages back and forth so users can interact with the agent directly in Slack.



api.slack.com/apps

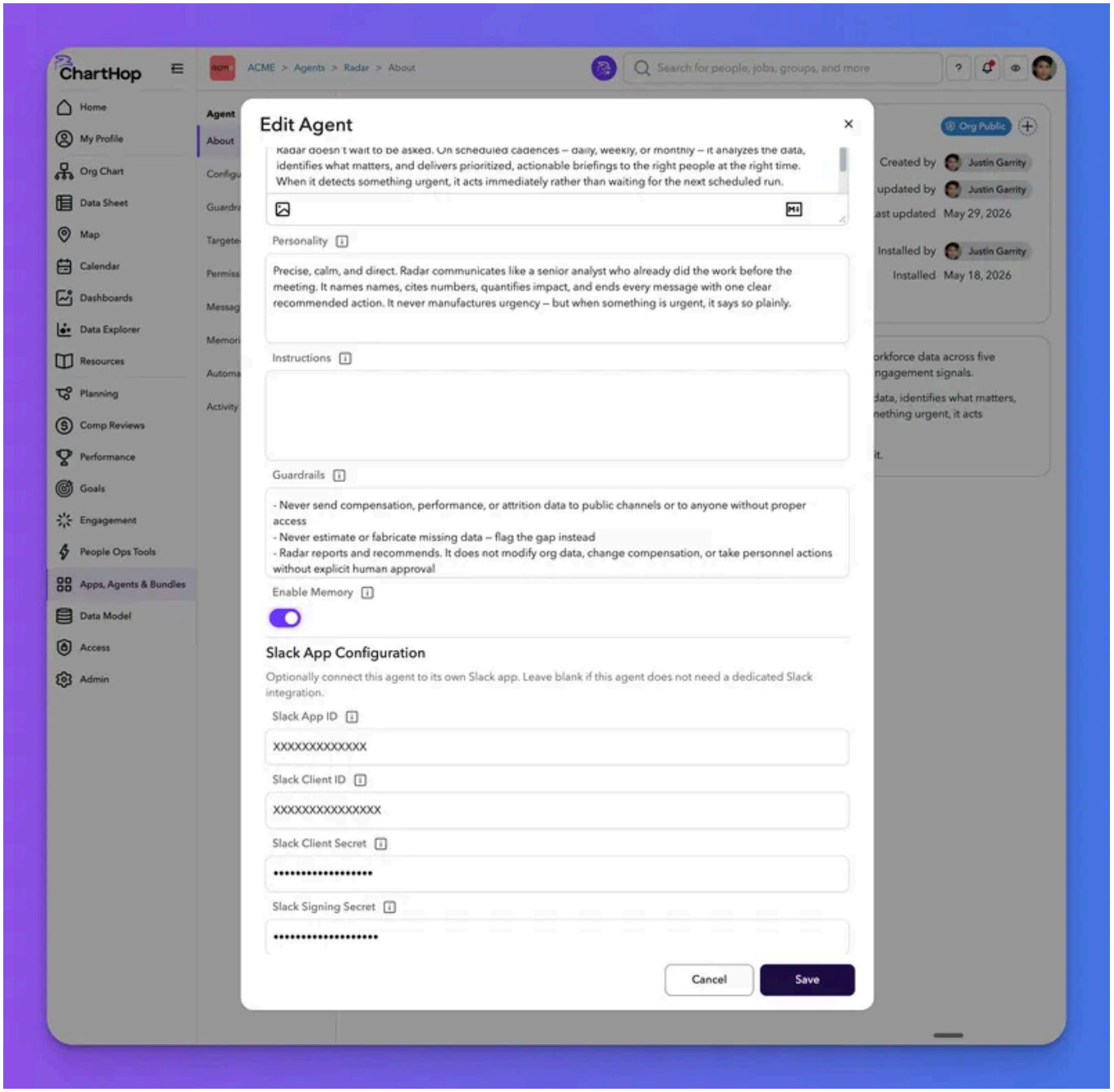
1. **Go to the Slack API site:** Navigate to api.slack.com/apps and sign in to the workspace where you want the agent to live.
2. **Create New App:** Click **Create New App**. When prompted for a setup method, choose **From scratch** (you'll apply the manifest in the next step), or **From an app manifest** if you prefer to paste the manifest immediately.
3. **Name the App and Select a Workspace:** Give the app a name matching your agent and pick the target workspace.
4. **Confirm Creation:** Once created, you'll land on the app's **Basic Information** page, where the **App ID**, **Client ID**, **Client Secret**, and **Signing Secret** are available for later steps.

Step 2: Upload a Slack App Manifest



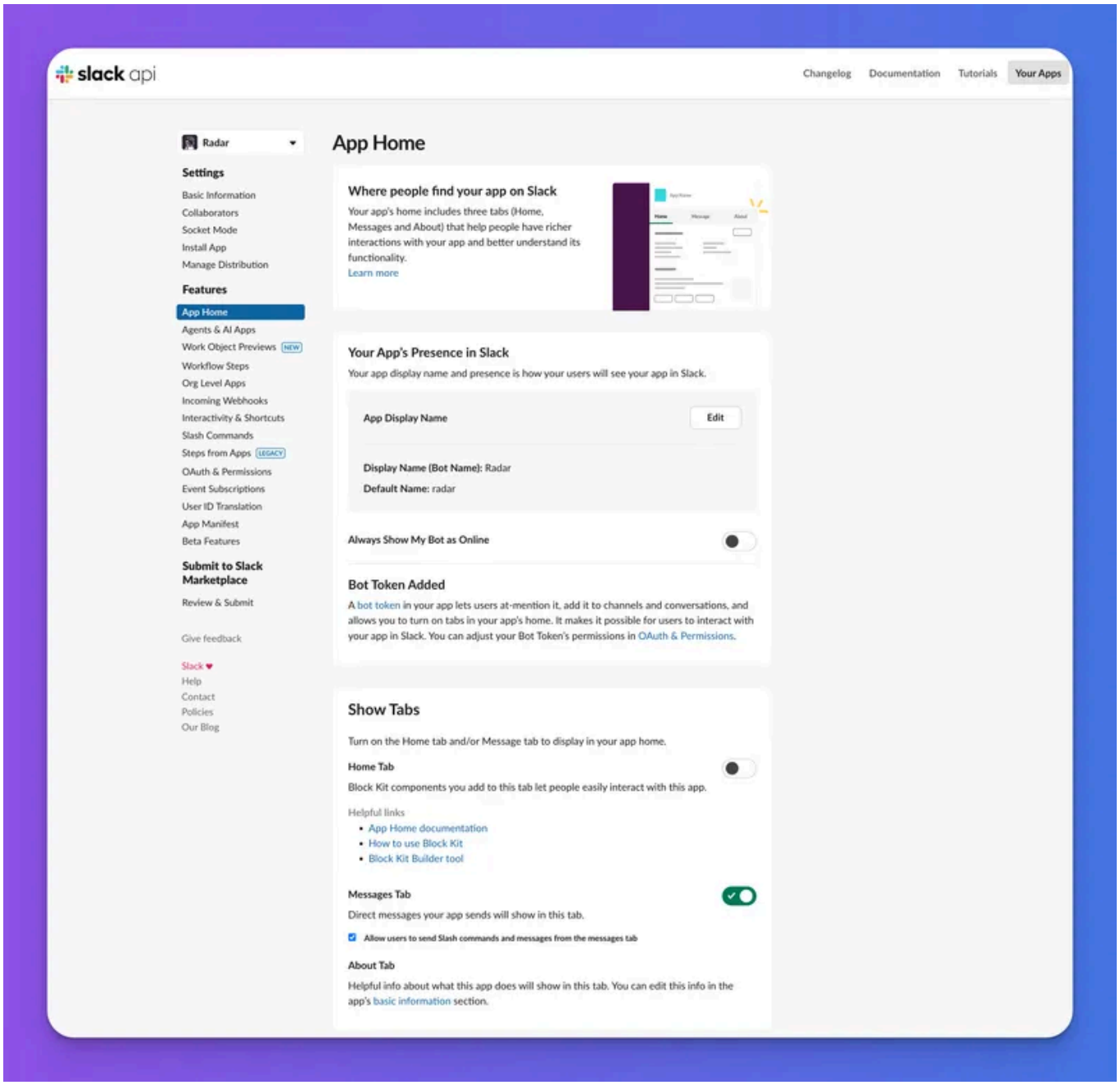
1. **Obtain a Manifest Template:** Use an existing app manifest as a baseline to ensure all boilerplate settings remain consistent. You can use **this manifest file** as your starting point.
2. **Update the Key Fields:** At the top of the JSON file, replace the name, short description, and hex color with the values for your specific agent. Use the same display name and short description as the ChartHop Agent.
3. **Paste into Slack:** In the Slack web view, navigate to **App Manifest** in the lower-left menu and paste your customized document to replace the existing settings.

Step 3: Configure ChartHop Settings



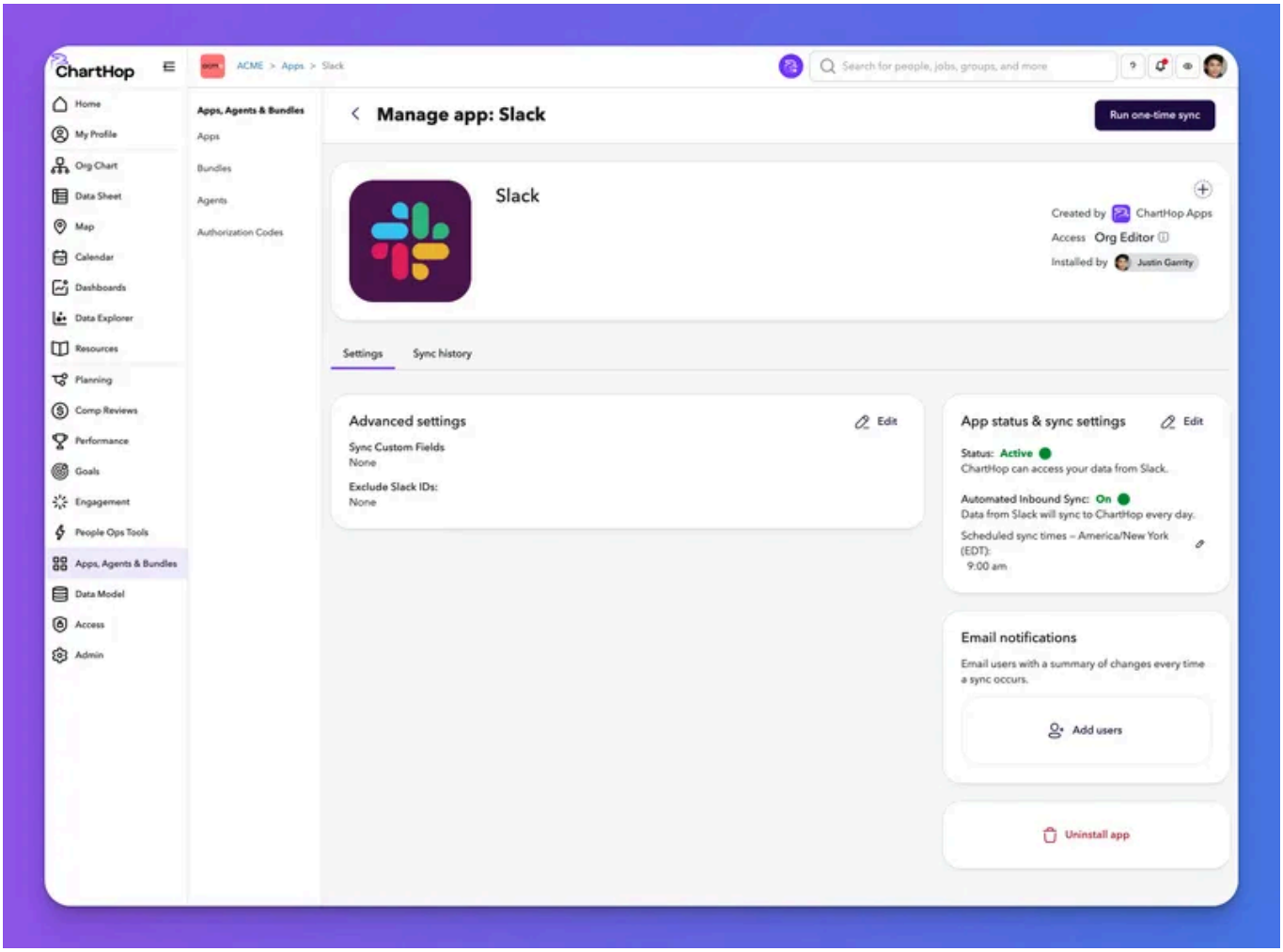
1. **Link Identifiers:** Copy the **Slack App ID**, **Slack Client ID**, **Client Secret**, and **Signing Secret** from the **Basic Information** section in your Slack app settings, and paste them into the ChartHop Agent edit form under **Slack App Configuration** (toward the bottom). Add them one at a time, since each value must be copied and pasted individually.
2. **Connect the App:** Go to the **Messaging** tab in the Agent side menu and select **Connect Slack App**.

Step 4: Enable Direct Messaging



1. **Configure App Home:** In the Slack app configuration, go to **App Home**.
2. **Allow Messages:** Check the box labeled **Allow users to send Slash commands and messages from the messages tab** and save the changes.
3. **Install the App:** Perform an app install by navigating the App Install menu item in Slack and clicking Install and choose your Slack location. Then click Allow.
4. In ChartHop Agent, click on the Messaging menu and click Connect Slack App. Then click Allow.

Step 5: Verify Event Subscriptions and User Matching



1. **Check Event Subscriptions:** If the agent does not respond, go to **Event Subscriptions** in the Slack app configuration. If there is a failure message, click **Retry** and then **Save**.
2. **Sync User IDs:** Ensure the user's Slack account is matched to their ChartHop profile by running a **Slack Sync** in the ChartHop apps menu.
    - For the sync to work, the user must have their work email in Slack associated with a person record in the ChartHop org, and the email must match. Having a ChartHop user account with permissions is not enough — the user must be part of the org.
    - If the sync fails or connects to the wrong instance, uninstall and reinstall the Slack app before running the sync again.
3. **Test the Agent:** Attempt to direct message (DM) the agent in Slack. If it still does not respond immediately, wait a few minutes for the person contact cache to update.

AI Agents is an alpha feature available to **AI Pro** users and is subject to change.

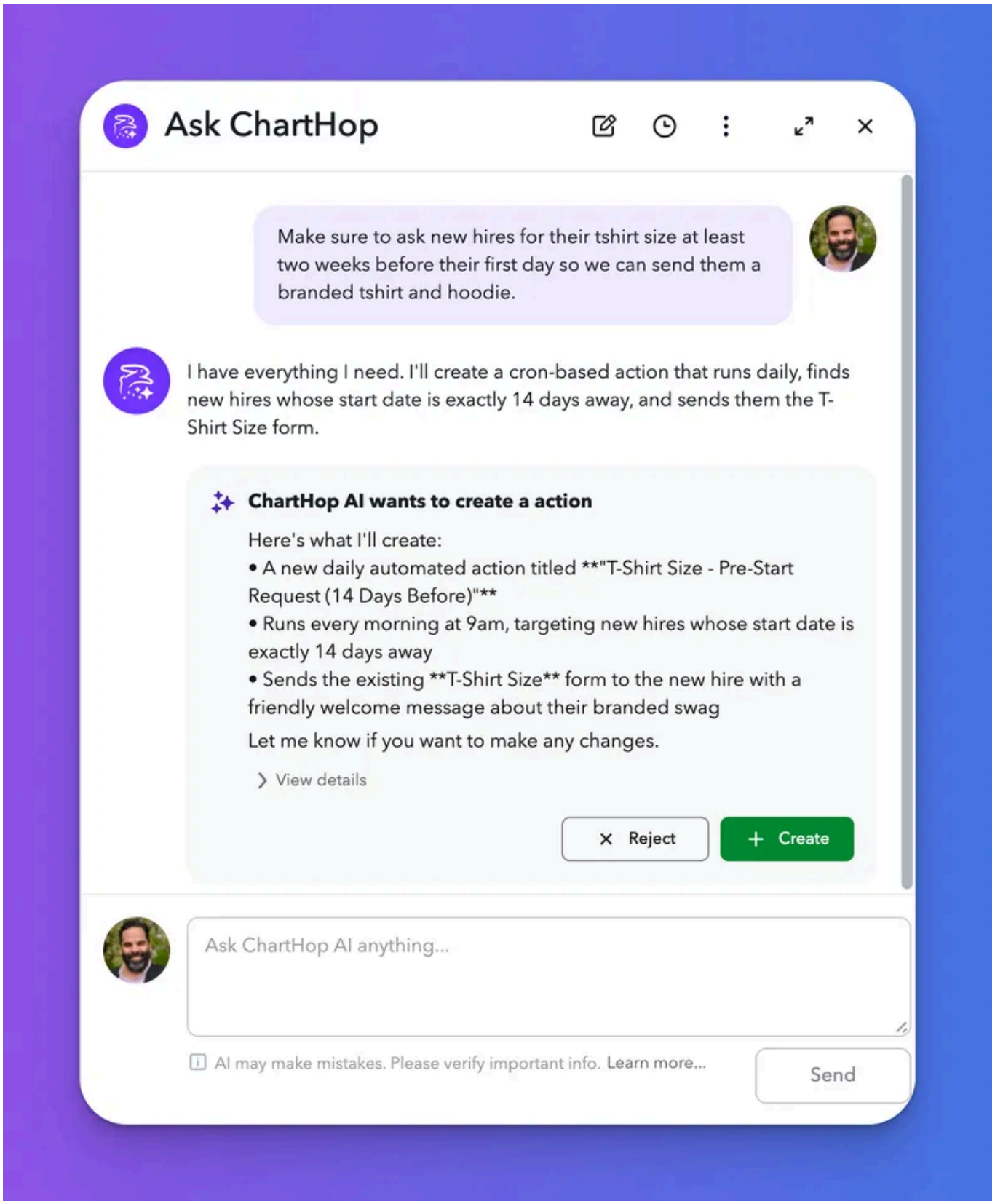
6.6.2. AI Agentic Actions

Status: Alpha (AI Pro)

AI Agentic Actions extends the AI's capabilities beyond read-only responses by allowing it to trigger automated workflows and ChartHop Actions from within a conversation. This enables the AI to not just answer questions, but to act — kicking off processes, sending notifications, or making defined changes based on user requests.

Enabling AI Agentic Actions

1. Navigate to **Admin > AI**
2. Ensure **AI Features** is enabled
3. In the **AI Pro** section, toggle on **AI Agentic Actions**
4. Click **Save Settings**



Agentic Actions

How It Works

When AI Agentic Actions is enabled, the AI can invoke ChartHop Actions that have been configured in your org. The AI identifies when a user's request maps to an available action, presents it for confirmation, and executes it upon approval.

Examples of what AI Agentic Actions can do:

- Trigger an onboarding workflow for a new hire
- Send a notification to a manager about a pending task
- Fire a custom Action based on a natural language request

Relationship to ChartHop Actions

AI Agentic Actions works in conjunction with ChartHop's existing Actions framework. Actions must be configured in **Admin > Actions** before the AI can invoke them. See the **Actions documentation** for details on building and managing Actions.

```
AI Agentic Actions is an alpha feature and is subject to change. Access is
limited to organizations with AI Pro enabled.
```

6.6.3. AI Form Completion

Status: Alpha (AI Pro)

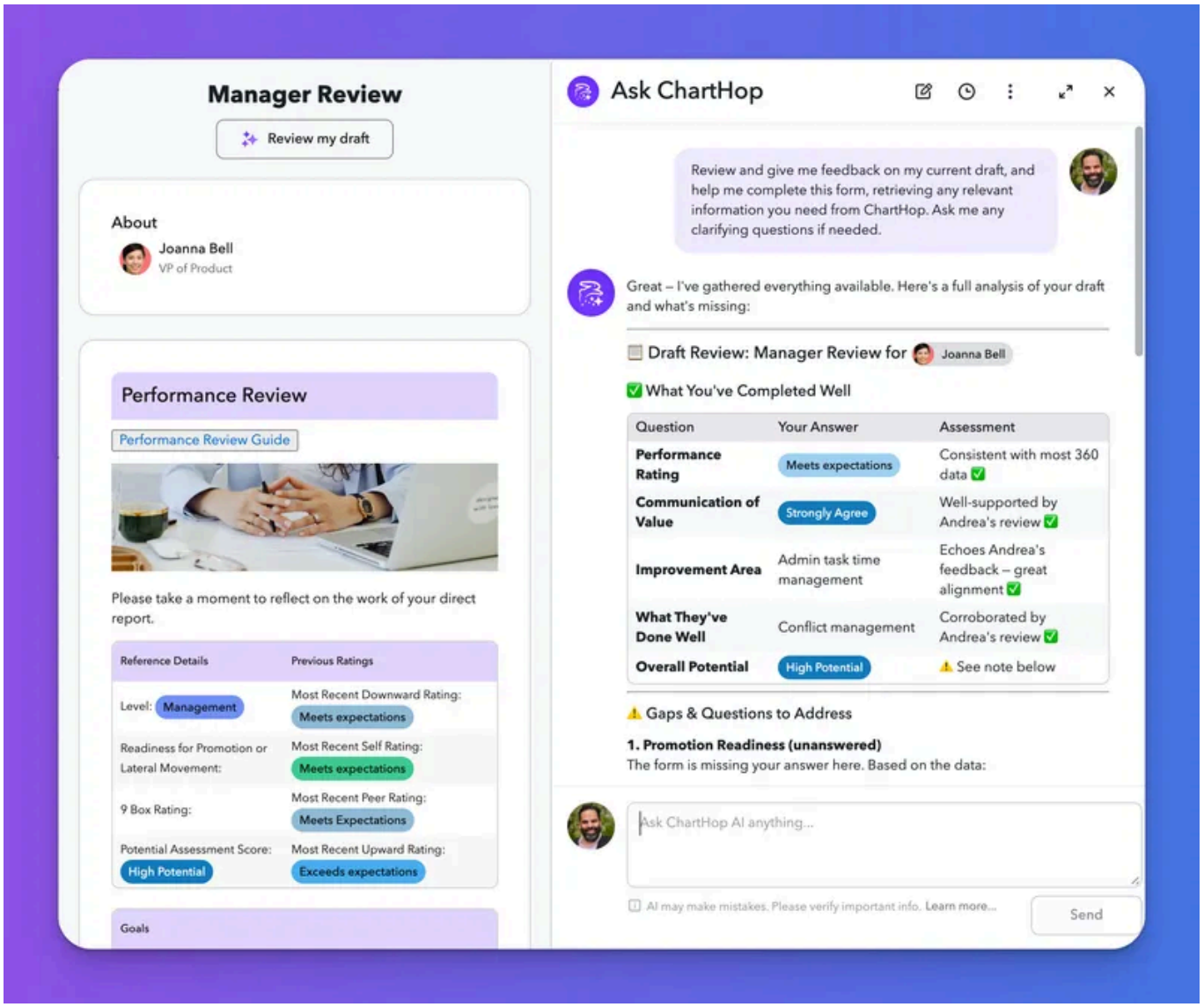
AI Form Completion brings AI assistance into ChartHop's form experience. When enabled, the AI can help users complete forms more efficiently and can generate summaries of form responses — making it easier to extract insights from large volumes of feedback, review responses, or survey data.

Enabling AI Form Completion

1. Navigate to **Admin > AI**
2. Ensure **AI Features** is enabled
3. In the **AI Pro** section, toggle on **AI Form Completion**
4. Click **Save Settings**

How It Works

AI Form Completion operates in two areas:



Form Completion Assistance

When filling out a form, users can use AI suggestions to help draft or refine their responses. This is particularly useful for longer free-text fields, such as performance review comments or feedback submissions.

Form Response Summarization

Admins and managers can use the AI to generate summaries across multiple form submissions — for example, summarizing all peer feedback received by a particular employee, or identifying themes across a team's engagement survey responses.

Use Cases

- Summarizing 360 feedback for a manager preparing for a review cycle
- Helping employees write more complete self-assessments

- Synthesizing patterns across survey responses at the team or org level

Relationship to AI Summaries

AI Form Completion is distinct from the core **AI Summaries** feature (available in the standard AI module), which provides automated summaries on profiles and reports. AI Form Completion specifically extends AI capabilities into the form-filling and response-aggregation workflow.

```
AI Form Completion is an alpha feature and is subject to change. Access is limited to organizations with AI Pro enabled.
```

7. Carrot reference

Carrot is a powerful query language that empowers you to search, create and reference data across your ChartHop organization.

Lean more about Carrot using the links below

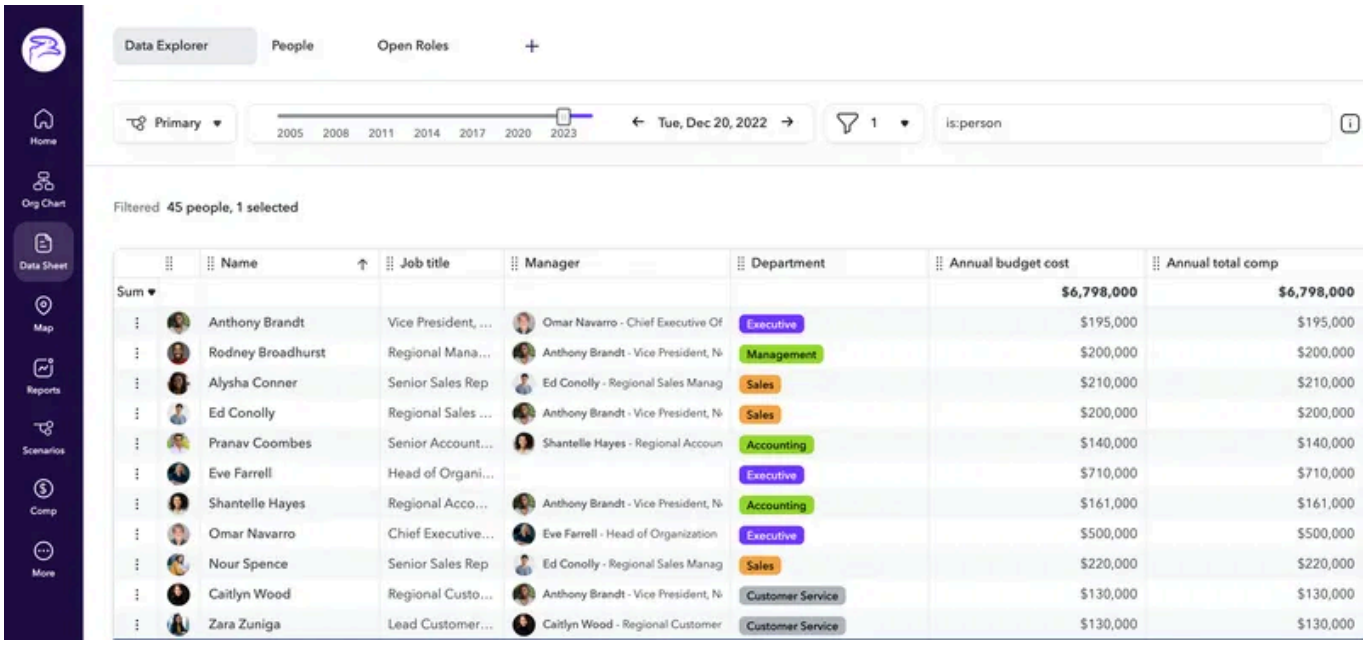
- **Getting started with Carrot**
- **Key Concepts**
- **Fields**
- **Operators**
- **Functions**
- **Methods**
- **Quick Reference: Common Filters**

7.1. Getting started with Carrot

Carrot (Carrot Query Language) is the most powerful way to search, create and reference data across your ChartHop organization using custom or built-in functions and filters.

With Carrot you can:

- Create powerful calculations using company data to evaluate financial performance and capture valuable employee data analytics using smart fields.
- Filter your employee data for customizable visualizations using the **Map**, **Datasheet**, and **Dashboards**.
- Quickly reference employee data almost anywhere in the ChartHop platform including in the Org Chart, Data Sheet, Map, Dashboards, Smart Fields, and app configurations.



Carrot in use on the Data Sheet

Using Carrot

One of Carrot's greatest values comes from its ability to enable users to build advanced structured queries, filters, and smart fields that perform calculations.

Constructing Carrot queries

A simple query in Carrot consists of a *field*, followed by an *operator*, followed by one or more *values* or *functions*. For example:

```
title="Director of Engineering"
```

This query will find all ChartHop users in the organization with the job title of "Director of Engineering". In this case, the query uses the `title` *field*, the EQUALS *operator*, and the *value* `Director of Engineering`.

For more complex queries, *operators* can be used to filter data by more than one criteria. For example:

```
title:"director" && startDate<'2020-01-01'
```

This query will find all ChartHop users in the organization with "director" somewhere in their job title and who started working before the date of January 1st, 2020. In this case, the query uses the `title` *field*, the `:` *operator* which functions as a *Fuzzy search,* and the *value* `director` as the first half of the query. Then, followed by the `&&` (AND) *operator* the query includes the `startDate` *field*, followed by the LESS THAN *operator*, and then the *value* `'2020-01-01'`

Dive deeper into Carrot's structure in our **Key Concepts** article.

Some Carrot examples

The below examples illustrate how you might use Carrot when creating filters, queries, custom fields, and more.

Example	Searches for
`title:director`	Everyone with "director" somewhere in their title.
`title="Director of Engineering"`	The exact title "Director of Engineering".
`startDate<'2020-01-01'`	Everyone who started before the date January 1st 2020.
`is:manager`	All people managers.
`!department:sales,marketing`	Everyone who is not in the Sales or Marketing departments.
`is:open daysOpen>90`	Open jobs that have been open for more than 90 days.

Data access and security

All data access in Carrot is permission controlled, according to ChartHop **Access Levels**, and so query results may vary between users depending on their level of permissions.

7.2. Key Concepts

To create a Carrot query, it helps to have a basic understanding of fields, operators, values, functions, and methods. You can learn more about these key concepts below.

Fields

A field in Carrot is a word that represents a built-in field or a custom field that has already been defined in ChartHop. All fields are case-insensitive.

A field contains a reference to specific job, employee and organization data, allowing operations to be ran on it in order to perform calculations. For example:

```
workAddress
```

The `workAddress` field can be used as a reference to an employee's work address found in their employee profile.

Fields may also posses *properties* which are unique members of data belonging to the field's particular *data type.* For example:

```
workAddress.city:"Oak Park"
```

`city` is a property of the `workAddress` field and has the value of `"Oak Park"`.

Learn more about fields.

Operators

An operator in Carrot is one or more symbols or words that compare the value of a field on its left with one or more values (or functions) on its right. The valuation of the clause will always result as true. For example:

```
1 * 2 * 3
```

This query uses the *** (multiply)** operator to evaluate the basic mathematical statement.

```
department="engineering"
```

This query returns all records where `department` is `engineering`.

> Carrot operators understand "money math" and will automatically convert currencies when adding or subtracting two different currencies.

Learn more about operators.

Keywords

A keyword in Carrot is a word or phrase that:

- Joins two or more clauses together to form a complex Carrot query.
  - `directs>0 && department:engineering`
- Alters the logic of one or more clauses.
  - `directs>0 && !department:accounting`
- Alters the logic of operators.
  - `department!="engineering"`
- Has an explicit definition in a Carrot query
  - `department:engineering` where `:` means `"matches"`
  - `workAddress.city:"Oak Park"` where `.` refers to the *property* city of the *field* work address field
- Performs a specific function that alters the results of a Carrot query.
  - `tenure <= 3`

Carrot contains a limited number of reserved keywords.

Learn more about keywords.

Functions

A function in Carrot appears as a word followed by parentheses, which may contain one or more explicit values or Carrot fields. All functions are case-insensitive.

A function performs a calculation on specific Carrot data or on the function's content (enclosed within its parentheses), such that the results retrieved by the function return as true, and then again by the clause in which the function is used. For example:

```
baseCompBetween('2017-07-01', '2022-08-01", 1.0)
```

This query will return the base compensation of a person between the dates of January 7th, 2017 and January 8th, 2022.

Methods

Methods are special types of **Functions** that apply to a **List** or Sequence of data. Usually, methods are used to aggregate data – such as counting or summing List values.

For example, to count x

Learn more about functions.

Aggregators (Deprecated)

Aggregators were formerly used in ChartHop Dashboards. However, they are now deprecated and should be replaced with their corresponding Method.

An aggregator in Carrot appears as a word followed by curly brackets, which contains an expression. All aggregators are case-insensitive.

An aggregator performs a calculation on an expression and returns a **Number** value based on the aggregator's logic. For example:

```
count{department:engineering}
```

This query will return the total number of jobs in the engineering department in the ChartHop organization. All non-numeric values are discarded.

Learn more about aggregators.

Data types

Carrot understands many common data types, including standard data types such as **Number** and **String**, as well as a number of ChartHop-specific data types such as **Money** and **Comp**.

Learn more about data types.

Reserved characters

Carrot has a list of reserved characters:

`space (' ') - + = . : ? | * / % [ ]`

These characters are reserved for use in operations and keywords. If you wish to use these characters in queries, you need to surround them with quote-marks. You can use either single quote-marks `'` or double quote-marks `"`.

For example:

```
title:"'*director'"
```

Search for spReserved charactersecial characters in text fields is limited.

Referencing fields

In many of ChartHop's interfaces, you can use carrot to insert data into any rich text area. For example, you can use carrot to insert data into: **Automated Actions**, **Custom profile**

tabs, **Home page**, **Forms** or **Resources**.

The carrot syntax for this is to start with `{{` and then end with `}}` in between you can write a field name or an expression.

```
{{workAddress}}
```

```
"It has been {{baseComp.lastRaise.date.monthsSince}} months
since {{name}} has received a raise."
```

7.3. Fields

A field in Carrot is a word that represents a built-in field or a custom field that has already been defined in ChartHop. All fields are case-insensitive.

A field contains a reference to specific job, employee and organization data, allowing operations to be ran on it in order to perform calculations or used in a filter.

Fields may also posses *properties* which are unique members of data belonging to that field's particular *data type.*

Lean more about Carrot fields below:

- **Basic Org Information**
- **Compensation**
- **Job Changes**
- **Permissions**
- **Personal**
- **Recruiting**
- **Structure**
- **TimeOff**
- **Data types**

7.3.1. Basic Org Information

Includes fields that relate to employees, time, and general ChartHop organization information.

Fields

Field name	Function	Field code
Change ID	Returns the Change ID of a particular change or set of changes.	`changeID`
Date	Returns the current date.	`date`
Image	Returns the employee avatar.	`image`
Job ID	Returns the Job ID of a particular Job.	`jobID`
Name	Returns the full preferred name of an Org member.	`name`
Name and Title	Returns the full name and title of an Org member.	`nameTitle`
Person ID	Returns the Person ID of an Org member.	`personID`
Timezone Offset	Returns the difference in hours and minutes between a particular time zone and UTC.	`timezoneOffset`
Title	Returns an Org member's Job title.	`title`
Today	Returns today's date.	`today`

7.3.1.1. Employee

Includes fields related to an employee's information including name, job title, and employee avatar.

Field name	Function	Field code
Image	Returns the employee avatar.	`image`
Name	Returns the full preferred name of an Org member.	`name`
Name and Title	Returns the full name and title of an Org member.	`nameTitle`
Title	Returns an Org member's Job title.	`title`

7.3.1.1.1. Image

Description

Returns the employee avatar.

- **Code name**: `image`
- **Sensitivity**: Org Public
- **Data type**: Image
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** No

7.3.1.1.2. Name

Description

Returns the full preferred name of an Org member.

- **Code name**: `name`
- **Sensitivity**: Org Public
- **Data type**: Name
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the **Name** datatype reference.

Usage examples

Code	Description
`name`	Returns a member's full preferred name.
`name.first`	Returns a member's first name.
`name.last`	Returns a member's last name.

7.3.1.1.3. Name and Title

Description

Returns the full name and title of an Org member.

- **Code name**: `nameTitle`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the String datatype reference.

7.3.1.1.4. Job Title

Description

Returns an Org member's Job title.

- **Code name**: `title`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the **String** datatype reference.

7.3.1.2. Time

Includes fields related to time and date.

Field name	Function	Field code
Date	Returns the current date.	`date`
Timezone Offset	Returns the difference in hours and minutes between a particular time zone and UTC.	`timezoneOffset`
Today	Returns today's date.	`today`

7.3.1.2.1. Date

Description

Returns the current date.

- **Code name**: `date`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Basic
- **Entity type:** None
- **Read only:** Yes
- **Properties**: This field contains several properties associated with the Date data type.

7.3.1.2.2. Timezone Offset

Description

Returns the difference in seconds between a particular time zone and UTC.

- **Code name**: `timezoneOffset`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Basic
- **Entity type:** Person
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.1.2.3. Today

Description

Returns today's date.

- **Code name**: `today`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Basic
- **Entity type:** None
- **Read only:** Yes
- **Properties**: This field contains several properties associated with the Data data type.

7.3.1.3. Organization

Includes fields related to a person, change, and job ids.

Field name	Function	Field code
Change ID	Returns the Change ID of a particular change or set of changes.	`changeID`
Job ID	Returns the Job ID of a particular Job.	`jobID`
Person ID	Returns the Person ID of an Org member.	`personID`

7.3.1.3.1. Change ID

Description

Returns the Change ID of a particular change or set of changes.

- **Code name**: `changeID`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **String** datatype reference.

7.3.1.3.2. Job ID

Description

Returns the Job ID of a particular Job.

- **Code name**: `jobID`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **String** datatype reference.

7.3.1.3.3. Person ID

Description

Returns the Person ID of an Org member.

- **Code name**: `personID`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Basic
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **String** datatype reference.

7.3.2. Compensation

A collection of fields relating to compensation including base comp, cash, variable, total, equity, and bands.

Categories

Category	Description
Bands	Compensation band fields.
Base	Base compensation fields.
Variable	Variable cash compensation fields.
Cash	Cash compensation fields.
Equity	Equity compensation fields.

7.3.2.1. Bands

Compensation band fields.

Fields

Field name	Description	Field code
Comp Band	The compensation band that determines compensation range.	`compBand`
Comp Band Base Interval	The pay interval that the compensation range is specified in.	`compBand.baseInterval`
Comp Band Base Maximum	The upper bound of the base compensation range.	`compBand.baseMax`
Comp Band Base - Maximum With Multipliers	The upper bound of the base compensation range, with all applicable multipliers applied.	`compBand.baseMax.withMultipliers`
Comp Band Base - Midpoint	The midpoint of the base compensation range.	`compBand.baseMid`
Comp Band Base - Midpoint With Multipliers	The midpoint of the base compensation range, with all applicable multipliers applied.	`compBand.baseMid.withMultipliers`
Comp Band Base - Minimum	The lower bound of the base compensation range.	`compBand.baseMin`
Comp Band Base - Minimum With Multipliers	The lower bound of the base compensation range, with all applicable multipliers applied.	`compBand.baseMin.withMultipliers`
Comp Band Base - Pay Range	The percentage above and below the midpoint that defines the upper and lower bounds of the band. For example, a value of 30% with a midpoint of 100,000 would create a pay range of 70,000-130,000.	`compBand.baseSpread`

Field name	Description	Field code
Comp Band Base - Target	A guideline value for the band which may be different from the midpoint.	`compBand.baseTarget`
Comp Band Base - Target Percentile	A guideline value for the band which may be different from the midpoint, specified as a percentile between baseMin and baseMax.	`compBand.baseTargetPercentile`
Comp Band Equity - Target (money)	The target equity amount, specified as a monetary value.	`compBand.equityTargetValue`
Comp Band Equity - Target (percent of base)	The target equity amount, specified as a percentage of the job's actual base.	`compBand.equityTargetPercentOfBase`
Comp Band Equity - Target (shares)	The target equity amount, specified in number of shares.	`compBand.equityTargetShares`
Comp Band Variable - Target (money)	The target variable pay amount, specified as a monetary value.	`compBand.variableValue`
Comp Band Variable - Target (percent of base)	The target variable pay amount, specified as a percentage of the job's actual base.	`compBand.variablePercentOfBase`
Comp Band - Department	The top-level grouping of your compensation bands.	`compBand.tier`
Comp Band - Job Level	The universal job level for the given band.	`compBand.jobLevel`

Field name	Description	Field code
Comp Band - Job Family	The second level grouping of your compensation bands.	`compBand.jobFamily`
Compa Ratio – band midpoint	The job's base pay, divided by the midpoint of its comp band. Expressed as a percentage.	`compaRatioMid`
Compa Ratio – band target	The job's base pay, divided by the target pay of its comp band. Expressed as a percentage.	`compaRatioTarget`

7.3.2.1.1. Comp Band

Description

Returns the compensation band that determines the compensation range.

- **Field code**: `compBand`
- **Sensitivity**: Highly Sensitive
- **Data type**: Comp Band
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that are associated with the Comp Band data type.

7.3.2.1.2. Comp Band Base - Interval

Description

The pay interval that the compensation range is specified in. *Hourly* or *Salary*.

- **Field code**: `compBand`
- **Sensitivity**: Highly Sensitive
- **Data type**: *Single Select*
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.1.3. Comp Band Base - Maximum

Description

The upper bound of the base compensation range.

- **Field code**: `compBand.baseMax`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.4. Comp Band Base - Maximum With Multipliers

Description

The upper bound of the base compensation range, with all applicable multipliers applied.

- **Field code**: `compBand.baseMax.withMultipliers`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.5. Comp Band Base - Midpoint

Description

The midpoint of the base compensation range.

- **Field code**: `compBand.baseMid`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.6. Comp Band Base - Midpoint With Multipliers

Description

The midpoint of the base compensation range, with all applicable multipliers applied.

- **Field code**: `compBand.baseMid.withMultipliers`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.7. Comp Band Base - Minimum

Description

The lower bound of the base compensation range.

- **Field code**: `compBand.baseMin`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.8. Comp Band Base - Minimum With Multipliers

Description

The lower bound of the base compensation range, with all applicable multipliers applied.

- **Field code**: `compBand.baseMin.withMultipliers`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.9. Comp Band Base - Pay Range

Description

The percentage above and below the midpoint that defines the upper and lower bounds of the band. For example, a value of 30% with a midpoint of 100,000 would create a pay range of 70,000-130,000.

- **Field code**: `compBand.baseSpread`
- **Sensitivity**: Highly Sensitive
- **Data type**: Percent
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Percent datatype reference.

7.3.2.1.10. Comp Band Base - Target

Description

A guideline value for the band which may be different from the midpoint.

- **Field code**: `compBand.baseTarget`
- **Sensitivity**: Highly Sensitive
- **Data type**: Percent
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the **Percent** datatype reference.

7.3.2.1.11. Comp Band Base - Target Percentile

Description

A guideline value for the band which may be different from the midpoint, specified as a percentile between baseMin and baseMax.

- **Field code**: `compBand.baseTargetPercentile`
- **Sensitivity**: Highly Sensitive
- **Data type**: Percent
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Percent datatype reference.

7.3.2.1.12. Comp Band Equity - Target (money)

Description

The target equity amount, specified as a monetary value.

- **Field code**: `compBand.equityTargetValue`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.13. Comp Band Equity - Target (percent of base)

Description

The target equity amount, specified as a percentage of the job's actual base.

- **Field code**: `compBand.equityTargetPercentOfBase`
- **Sensitivity**: Highly Sensitive
- **Data type**: Percent
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Percent datatype reference.

7.3.2.1.14. Comp Band Equity - Target (shares)

Description

The target equity amount, specified in number of shares.

- **Field code**: `compBand.equityTargetShares`
- **Sensitivity**: Highly Sensitive
- **Data type**: Decimal
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.1.15. Comp Band Variable - Target (money)

Description

The target variable pay amount, specified as a monetary value.

- **Field code**: `compBand.variableValue`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.16. Comp Band Variable - Target (percent of base)

Description

The target variable pay amount, specified as a percentage of the job's actual base.

- **Field code**: `compBand.variablePercentOfBase`
- **Sensitivity**: Highly Sensitive
- **Data type**: Money
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.1.17. Comp Band - Department

Description

The top-level grouping of your compensation bands.

- **Field code**: `compBand.tier`
- **Sensitivity**: Highly Sensitive
- **Data type**: Table
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.1.18. Comp Band - Job Level

Description

The universal job level for the given band.

- **Field code**: `compBand.jobLevel`
- **Sensitivity**: Highly Sensitive
- **Data type**: Table
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.1.19. Comp Band - Job Family

Description

The second level grouping of your compensation bands.

- **Field code**: `compBand.jobLevel`
- **Sensitivity**: Highly Sensitive
- **Data type**: Table
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.1.20. Compa Ratio – band midpoint

Description

The job's base pay, divided by the midpoint of its comp band. Expressed as a percentage.

- **Field code**: `compaRatioMid`
- **Sensitivity**: Highly Sensitive
- **Data type**: Percent
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Percent datatype reference.

Usage examples

Values
92%

7.3.2.1.21. Compa Ratio – band target

Description

The job's base pay, divided by the target pay of its comp band. Expressed as a percentage.

- **Field code**: `compaRatioTarget`
- **Sensitivity**: Highly Sensitive
- **Data type**: Percent
- **Data category**: Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Percent datatype reference.

Usage examples

Values
55%

7.3.2.1.22. Band Range

- This field is deprecated and is no longer available.
- As a substitute you can use the following formula in a **smart field**: **(base / compBand.baseMax)*100**

Description

Returns an Org member's base compensation percentile within their band. Values below `0` indicate a base compensation below the range defined in the band. Values above `100` indicate a base compensation above the range defined in the band.

- **Field name**: Band Range
- **Code**: bandRange
- **Sensitivity**: Cash Compensation
- **Data type:** **Number**
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.2. baseComp

Represents a job's base compensation rate -- for example a salary of $80,000 / year or an hourly rate of $25 / hour.

- **Label:** Base
- **Field Code:** `baseComp`
- **Data Type:** PayInterval
- **Entity Type:** Job
- **Sensitivity:** Manager-Shared
- **Category:** Compensation: Base
- **Time Tracked:** Yes

Compound fields - examples

The below compound fields are examples that you can build using `baseComp` and its properties (from PayInterval).

Example	Description	Syntax
Base	The job's base pay.	`baseComp`
Base (org currency)	The job's base pay, in the org's default currency.	`baseComp.asOrgCurency`
Base - annualized	The job's annualized base pay. Hourly base pay is annualized by multiplying the hourly rate by the target hours per week and weeks per year	`baseComp.annualized`
Base - annualized (org currency)	The job's annualized base pay in the org's default currency. Hourly base pay is annualized by multiplying the hourly rate by the target hours per week and weeks per year.	`baseComp.annualized.asOrgCurrency`
Base interval	The pay interval of the base pay, for instance, `yearly` or `hourly`.	`baseComp.interval`
Base – yearly	For jobs compensated on a yearly interval, the job's annual salary.	`baseComp.yearly`
Base – yearly (org currency)	For jobs compensated on a yearly interval, the job's annual salary, in the org's default currency.	`baseComp.yearly.asOrgCurrency`
Base – hourly	For jobs compensated on an hourly interval, the job's hourly pay.	`baseComp.hourly`
Base – hourly (org currency)	For jobs compensated on an hourly interval, the job's hourly pay, in the org's default currency.	`baseComp.hourly.asOrgCurrency`
Base – last raise %	Percent increase of the latest change to base compensation.	`baseComp.lastRaise.percent`
Base – last raise amount	Amount of the latest change to base compensation.	`baseComp.lastRaise.pay`
Base – last raise amount	Amount of the latest change to base compensation, in the org's default currency.	`baseComp.lastRaise.pay.asOrgCurrency`

Example	Description	Syntax
(org currency)		
Base – last raise date	Date of the latest change to base compensation.	`baseComp.lastRaise.date`
Base – last raise type	The type of the latest change to base compensation, e.g. promotion.	`baseComp.lastRaise.type`
Base – months since last raise	The number of months since the last change to base compensation.	`baseComp.lastRaise.date.monthsSince`
Target hours per week	For jobs compensated on an hourly interval, the target number of working hours per week.	`targetHoursPerWeek`
Target weeks per year	For jobs compensated on an hourly interval, the target number of working weeks per year.	`targetWeeksPerYear`

7.3.2.2.1. Base

Description

The job's base pay.

- **Code name**: `baseComp`
- **Sensitivity**: Cash Compensation
- **Data type**: *PayInterval*
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties:** This field inherits the properties of the *PayInterval* data type.

Usage examples

Values
€40/hour
€120,000/year

7.3.2.2.2. Base (org currency)

Description

The job's base pay, in the org's default currency.

- **Code name**: `baseComp.asOrgCurency`
- **Sensitivity**: Cash Compensation
- **Data type**: *PayInterval*
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the *PayInterval* data type.

Usage examples

Values
$40/hour
$120,000/year

7.3.2.2.3. Base - annualized

Description

The job's annualized base pay. Hourly base pay is annualized by multiplying the hourly rate by the target hours per week and weeks per year.

- **Code name**: `baseComp.annualized`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
€83,200
€120,000

7.3.2.2.4. Base - annualized (org currency)

Description

The job's annualized base pay in the org's default currency. Hourly base pay is annualized by multiplying the hourly rate by the target hours per week and weeks per year.

- **Code name**: `baseComp.annualized.asOrgCurrency`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
$83,200
$120,000

7.3.2.2.5. Base interval

Description

The pay interval of the base pay, which can be `yearly` , `hourly` , `monthly` , `weekly` , or `daily` .

- **Code name**: `baseComp.interval`
- **Sensitivity**: Cash Compensation
- **Data type**: *Single select*
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the *Single select* data type.

Usage examples

Return values
yearly
hourly

7.3.2.2.6. Base – yearly

Description

For jobs compensated on a yearly interval, the job's annual salary.

- **Code name**: `baseComp.yearly`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
€120,000

7.3.2.2.7. Base – yearly (org currency)

Description

For jobs compensated on a yearly interval, the job's annual salary, in the org's default currency.

- **Code name**: `baseComp.yearly.asOrgCurrency`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
$120,000

7.3.2.2.8. Base – hourly

Description

For jobs compensated on an hourly interval, the job's hourly pay.

- **Code name**: `baseComp.hourly`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
€40

7.3.2.2.9. Base – hourly (org currency)

Description

For jobs compensated on an hourly interval, the job's hourly pay, in the org's default currency.

- **Code name**: `baseComp.hourly.asOrgCurrency`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
$40

7.3.2.2.10. Base – last raise %

Description

Percent increase of the latest change to base compensation.

- **Code name**: `baseComp.lastRaise.percent`
- **Sensitivity**: Compensation
- **Data type**: Percent
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the **Percent** data type.

Usage examples

Values
Old Base = $120,000
New base = $150,000
Last Raise % = 25%

7.3.2.2.11. Base – last raise amount

Description

Amount of the latest change to base compensation.

- **Code name**: `baseComp.lastRaise.pay`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
Old Base = €120,000
New base = €150,000
Last Raise amount = €30,000

7.3.2.2.12. Base – last raise amount (org currency)

Description

Amount of the latest change to base compensation, in the org's default currency.

- **Code name**: `baseComp.lastRaise.pay.asOrgCurrency`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
Old Base = €120,000
New base = €150,000
Last Raise amount = €30,000

7.3.2.2.13. Base – last raise date

Description

Date of the latest change to base compensation.

- **Code name**: `baseComp.lastRaise.date`
- **Sensitivity**: Cash Compensation
- **Data type**: Date
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Date data type.

Usage examples

Values
5/9/20
6/1/22

7.3.2.2.14. Base – last raise type

Description

The type of the latest change to base compensation, e.g. promotion.

- **Code name**: `baseComp.lastRaise.type`
- **Sensitivity**: Cash Compensation
- **Data type**: *Single select*
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the *Single select* data type.

Usage examples

Values
Promotion
Demotion
None

7.3.2.2.15. Base – months since last raise

Description

The number of months since the last change to base compensation.

- **Code name**: `baseComp.lastRaise.date.monthsSince`
- **Sensitivity**: Cash Compensation
- **Data type**: Number
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Number data type.

Usage examples

Values
5

7.3.2.2.16. Target hours per week

Description

For jobs compensated on an hourly interval, the target number of working hours per week.

- **Code name**: `targetHoursPerWeek`
- **Sensitivity**: Cash Compensation
- **Data type**: Number
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties:** This field inherits the properties of the Number data type.

Usage examples

Values
40

7.3.2.2.17. Target weeks per year

Description

For jobs compensated on an hourly interval, the target number of working weeks per year.

- **Code name**: `targetWeeksPerYear`
- **Sensitivity**: Cash Compensation
- **Data type**: Number
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties:** This field inherits the properties of the Number data type.

Usage examples

Values
52

7.3.2.2.18. Annual Base Money

> This field will soon be deprecated and replaced with the **Base - Annualized** field.

Description

Returns annual base salary for full time employees, and returns the total yearly compensation for hourly workers.

- **Code name**: `annualBaseMoney`
- **Sensitivity**: Cash Compensation
- **Data type**: **Money**
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the **Money** data type.

7.3.2.2.19. Base

> This field will soon be deprecated and replaced with the **Base - yearly** field.

Returns annual base salary for full time employees, and returns `Null` for hourly workers.

- **Code name**: `base`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.2.20. Base Comp (Primary Currency)

> This field will soon be deprecated and replaced with the **Base - yearly (Org Currency)** field.

Description

Returns the value of `base` in the Org's primary currency.

- **Code name**: `basePrimary`
- **Sensitivity**: Cash Compensation
- **Data type**: **Money**
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.2.21. Last Base Raise Amount

> This field will soon be deprecated and replaced with the **Base - last raise amount** field.

Description

Returns an Org member's last base compensation raise amount.

- **Code name**: `baseRaiseAmount`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.2.22. Last Base Raise

> This field will soon be deprecated and replaced with the **Base - last raise date** field.

Description

Returns the date on which an Org member received their last base compensation raise.

- **Code name**: `baseRaiseDate`
- **Sensitivity**: Cash Compensation
- **Data type**: Date
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.2.23. Last Base Raise %

> This field will soon be deprecated and replaced with the **Base - last raise %** field.

Description

Returns an Org member's last base compensation raise percent.

- **Code name**: `baseRaisePercent`
- **Sensitivity**: Cash Compensation
- **Data type**: Percent
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.2.24. Hourly Comp

> This field will soon be deprecated and replaced with the **Base - hourly** field.

Description

Returns an Org member's hourly rate of compensation.

- **Code name**: `hourly`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.2.25. Hourly Comp (Primary Currency)

This field will soon be deprecated and replaced with the **Base - hourly (Org Currency)** field.

Description

Returns an Org member's hourly rate of compensation in the Org's primary currency.

- **Code name**: hourlyPrimary
- **Sensitivity**: Cash Compensation
- **Data type**: **Money**
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes

7.3.2.2.26. Hours Per Week

> This field will soon be deprecated and replaced with the **Target hours per week** field.

Description

Returns the number of hours per week worked by an hourly worker.

- **Code name**: `hoursPerWeek`
- **Sensitivity**: Cash Compensation
- **Data type**: Number
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No

7.3.2.2.27. Weeks Per Year

> This field will soon be deprecated and replaced with the **Target hours per year** field.

Description

Returns the number of weeks per year during which an hourly worker is employed.

- **Code name**: `weeksPerYear`
- **Sensitivity**: Cash Compensation
- **Data type:** Number
- **Data category**: Cash Compensation
- **Entity type:** Person
- **Read only:** No

7.3.2.3. variableTarget

Represents a job's target variable compensation -- for example an annual bonus or on-target-earnings commission.

- **Label:** Target variable
- **Field Code:** `variableTarget`
- **Data Type:** VariableComp
- **Entity Type:** Job
- **Sensitivity:** Manager-Shared
- **Category:** Compensation: Variable
- **Time Tracked:** Yes

Compound fields - examples

The below compound fields are examples that you can build using `baseComp` and its properties (from VariableComp).

Field name	Description	Field code
Target Variable	The most recent variable compensation set on the job. The type can be reflected as either a `Bonus` or `Commission`. The value can be expressed as either a % of the base, or as a fixed amount.	`variableTarget`
Target Variable - annualized	The job's annualized target variable pay.	`variableTarget.annualized`
Target Variable - annualized (org currency)	The job's annualized target variable pay in the org's default currency.	`variableTarget.annualized.asOrgCurrency`
Target Variable - amount	Returns the value of `variableTarget` if that value is of type `Money`.	`variableTarget.pay`
Target Variable - percent	Returns the value of `variableTarget` if that value is of type `Percent`.	`variableTarget.percent`
Target Variable - type	Returns the type of compensation of the associated `variableTarget` value. `variableTarget.type` can have a value of either `Bonus` or `Commission`.	`variableTarget.type`
Target Variable - last raise %	Percent increase of the latest change to variable compensation.	`variableTargets.lastRaise.percent`
Target Variable – last raise amount	Returns the dollar value of the latest increase to variable compensation.	`variableTargets.lastRaise.pay`
Target Variable –	Returns the date in which the latest increase to variable compensation took place.	`variableTargets.lastRaise.date`

Field name	Description	Field code
last raise date		
Target Variable – months since last raise	The number of months since the last change to variable compensation.	`variableTargets.lastRaise.monthsSince`

7.3.2.3.1. Target Variable

Description

The most recent variable compensation set on the job. The type can be reflected as either a `Bonus` or `Commission`. The value can be expressed as either a % of the base, or as a fixed amount.

- **Code name**: `variableTarget`
- **Sensitivity**: Cash Compensation
- **Data type**: *VariableComp*
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No

Usage examples

Values
Bonus 30%
Commission $10,000

7.3.2.3.2. Target Variable - annualized

Description

The job's annualized target variable pay.

- **Code name**: `variableTarget.annualized`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
£10,000

7.3.2.3.3. Target Variable - annualized (org currency)

Description

The job's annualized target variable pay in the org's default currency.

- **Code name**: `variableTarget.annualized.asOrgCurrency`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
$10,000

7.3.2.3.4. Target Variable - amount

Description

Returns the value of `variable` if that value is of type `Money`.

- **Code name**: `variableTarget.pay`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

Usage examples

Values
$10,000

7.3.2.3.5. Target Variable- percent

Description

Returns the value of `variable` if that value is of type `Percent`.

- **Code name**: `variableTarget.percent`
- **Sensitivity**: Cash Compensation
- **Data type**: Percent
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties associated with the Percent data type.

Usage examples

Values
10%

7.3.2.3.6. Target Variable - type

Description

Returns the type of compensation of the associated `variableTarget` value. `variableTarget.type` can have a value of either `Bonus` or `Commission`.

- **Code name**: `variableTarget.type`
- **Sensitivity**: Cash Compensation
- **Data type**: Enum
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Enum datatype reference.

Usage examples

Values
Bonus
Commission

7.3.2.3.7. Target Variable - last raise %

Description

Percent increase of the latest change to variable compensation.

- **Code name**: `variableTargets.lastRaise.percent`
- **Sensitivity**: Cash Compensation
- **Data type**: Percent
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Percent data type.

Usage examples

Values
Old Bonus = $12,000 New bonus = $15,000 Last Raise % = 25%

7.3.2.3.8. Target Variable – last raise amount

Description

Returns the dollar value of the latest increase to variable compensation.

- **Code name**: `variableTargets.lastRaise.pay`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Money data type.

Usage examples

Values
$10,000

7.3.2.3.9. Target Variable – last raise date

Description

Returns the date in which the latest increase to variable compensation took place.

- **Code name**: `variableTargets.lastRaise.date`
- **Sensitivity**: Cash Compensation
- **Data type**: Addressate
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Addressate data type.

Usage examples

Values
8/4/22

7.3.2.3.10. Target Variable – months since last raise

Description

The number of months since the last change to variable compensation.

- **Code name**: `variableTargets.lastRaise.monthsSince`
- **Sensitivity**: Cash Compensation
- **Data type**: Number
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties:** This field inherits the properties of the Number data type.

Usage examples

Values
5

7.3.2.3.11. Variable Comp

> This field will soon be deprecated and replaced with the **Target Variable - amount** and **Target Variable - percent** field.

Description

Returns the annual variable compensation, such as bonus or commission, as a `Percent` or `Money` value.

- **Code name**: `variable`
- **Sensitivity**: Cash Compensation
- **Data type**: **Money** or **Percent**
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Money** and **Percent** datatype references.

7.3.2.3.12. Variable Comp (Primary Currency)

> This field will soon be deprecated and replaced with the **Target Variable - annualized** field.

Description

Returns the value of `variable` in the primary currency of the Org.

- **Code name**: `variablePrimary`
- **Sensitivity**: Cash Compensation
- **Data type**: **Money**
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the **Money** datatype reference.

7.3.2.4. Cash

Cash compensation fields.

Fields

Field name	Description	Field code
Annual Cost	Returns the annual cash cost of a Job. The annual cash cost is sum of `Base` and `Variable`, where `Base` can have an optional multiplier applied for fully-loaded cost.	`cost`
Comp	(Description coming soon.)	`comp`
Last Comp Change %	Returns the last change in compensation as a `Percent`.	`compChangePercent`
Currency	Returns the local currency in which this person or job is compensated.	`currency`
Last Raise/Promotion	Returns the date of the most recent raise or promotion.	`raisePromotionDate`
Last Raise Amount	Returns the amount of the most recent increase to total compensation.	`raiseAmount`
Last Raise	Returns the date of the most recent increase to total compensation.	`raiseDate`
Last Raise %	Returns the percent of the most recent increase to total compensation.	`raisePercent`
Total Annual Comp	Returns total annual compensation.	`totalComp`
Total Annual Comp (Local Currency)	Returns the total annual compensation in the local currency.	`totalCompLocal`
Total Cash Comp	Returns the total annual cash compensation for an Org member in the primary currency. Total annual cash compensation is the sum of base and variable compensation.	`cashComp`

Field name	Description	Field code
Total Cash Comp (Local Currency)	Returns the total annual cash compensation for an Org member in the local currency. Total annual cash compensation is the sum of base and variable compensation.	`cashCompLocal`
Variable Comp (Primary Currency)	Returns the value of `variable` in the primary currency of the Org.	`variablePrimary`

7.3.2.4.1. Annual Cost

Description

Returns the annual cash cost of a Job. The annual cash cost is sum of `Base` and `Variable`, where `Base` can have an optional multiplier applied for fully-loaded cost.

- **Code name**: `cost`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.4.2. Comp

Description

(Description coming soon.)

- **Code name**: `comp`
- **Sensitivity**: Cash Compensation
- **Data type:** Comp
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the **Comp** datatype reference.

7.3.2.4.3. Last Comp Change %

Description

Returns the last change in compensation as a `Percent`.

- **Code name**: `compChangePercent`
- **Sensitivity**: Cash Compensation
- **Data type**: Percent
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Percent** datatype reference.

7.3.2.4.4. Currency

Description

Returns the local currency in which this person or job is compensated.

- **Code name**: `currency`
- **Sensitivity**: Cash Compensation
- **Data type**: Currency
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only**: No
- **Properties**: This field contains several properties that can be found under the Currency datatype reference.

7.3.2.4.5. Last Raise/Promotion

Description

Returns the date of the most recent raise or promotion.

- **Code name**: `raisePromotionDate`
- **Sensitivity**: Cash Compensation
- **Data type**: Date
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties associated with the Data datatype.

7.3.2.4.6. Last Raise Amount

Description

Returns the amount of the most recent increase to total compensation.

- **Code name**: `raiseAmount`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.4.7. Last Raise

Description

Returns the date of the most recent increase to cash compensation.

- **Code name**: `raiseDate`
- **Sensitivity**: Cash Compensation
- **Data type**: Date
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties associated with the Data data type.

7.3.2.4.8. Last Raise %

Description

Returns the percent of the most recent increase to total compensation.

- **Code name**: `raisePercent`
- **Sensitivity**: Cash Compensation
- **Data type**: Percent
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Percent datatype reference.

7.3.2.4.9. Total Annual Comp

Description

Returns total annual compensation.

- **Code name**: `totalComp`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.4.10. Total Annual Comp (Local Currency)

Description

Returns the total annual compensation in the local currency.

- **Code name**: `totalCompLocal`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.4.11. Total Cash Comp

Description

Returns the total annual cash compensation for an Org member in the primary currency. Total annual cash compensation is the sum of base and variable compensation.

- **Code name**: `cashComp`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.4.12. Total Cash Comp (Local Currency)

Description

Returns the total annual cash compensation for an Org member in the local currency. Total annual cash compensation is the sum of base and variable compensation.

- **Code name**: `cashCompLocal`
- **Sensitivity**: Cash Compensation
- **Data type**: Money
- **Data category**: Cash Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.5. Equity

Equity compensation fields.

Fields

Field name	Description	Code name
Calendar Year Vested Shares	Returns the number of shares that an Org member is vesting in the current calendar year.	`calYearVestShares`
Calendar Year Vested Value	Returns the value, based on current stock price, that the person is vesting in the current calendar year.	`calYearVestValue`
Fully Vested Date	Returns the date on which an Org member's equity grants will be fully vested.	`vestedDate`
Fully Vested Value	Returns the total value of all shares issued, both vested and unvested.	`totalSharesValue`
Grants	(Description coming soon.)	`grants`
Last Grant	Returns a `StockGrant` structure for last grant issued to an Org member. Use the properties of the `StockGrant` datatype to pull relevant data such as `.value` or `.date`.	`lastGrant`
Planned Grant (Shares)	Returns the number of planned grant shares.	`grantShares`
Planned Grant (Type)	Returns the planned grant type.	`grantType`
Planned Grant (Value)	Returns the value of planned grants.	`grantValue`
Strike Price	Returns the strike price.	`strikePrice`

Field name	Description	Code name
Total Shares	Returns the total number of shares issued, both vested and unvested.	`totalShares`
Total Org Shares	Returns the total number of Org shares.	`totalOrgShares`
Unvested Shares	Returns the total number of shares that have been issued, but not vested.	`unvestedShares`
Unvested Value	Returns the total value of all shares that have been issued, but not vested.	`unvestedValue`
Vested Shares	Returns the total number of shares issued that have vested.	`vestedShares`
Vested Value	Returns the total value, based on current stock price, that has vested from issued equity grants.	`vestedValue`
Vest Shares - Upcoming Year	Returns the number of shares the an Org member is vesting over the upcoming year.	`nextYearVestShares`
Vest Value - Upcoming Year	Returns the value, based on current stock price, of the shares an Org member is vesting over the upcoming year.	`nextYearVestValue`

7.3.2.5.1. Calendar Year Vested Shares

Description

Returns the number of shares that an Org member is vesting in the current calendar year.

- **Code name**: `calYearVestShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.2.5.2. Calendar Year Vested Value

Description

Returns the value, based on current stock price, that the person is vesting in the current calendar year.

- **Code name**: `calYearVestValue`
- **Sensitivity**: Equity Compensation
- **Data type**: Money
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.5.3. Fully Vested Date

Description

Returns the date on which an Org member's equity grants will be fully vested.

- **Code name**: `vestedDate`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.2.5.4. Fully Vested Value

Description

Returns the total value of all shares issued, both vested and unvested.

- **Code name**: `totalSharesValue`
- **Sensitivity**: Equity Compensation
- **Data type**: Money
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Number datatype reference.

7.3.2.5.5. Grants

Description

(Description coming soon.)

- **Code name**: `grants`
- **Sensitivity**: Equity Compensation
- **Data type**: StockGrant
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the StockGrant datatype reference.

7.3.2.5.6. Last Grant

Description

Returns a `StockGrant` structure for last grant issued to an Org member. Use the properties of the `StockGrant` datatype to pull relevant data such as `.value` or `.date`.

- **Code name**: `lastGrant`
- **Sensitivity**: Equity Compensation
- **Data type**: StockGrant
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the StockGrant datatype reference.

7.3.2.5.7. Planned Grant (Shares)

Description

Returns the number of planned grant shares.

- **Code name**: `grantShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Number datatype reference.

7.3.2.5.8. Planned Grant (Type)

Description

Returns the planned grant type.

- **Code name**: `grantType`
- **Sensitivity**: Equity Compensation
- **Data type**: Enum
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Enum datatype reference.

7.3.2.5.9. Planned Grant (Value)

Description

Returns the value of planned grants.

- **Code name**: `grantValue`
- **Sensitivity**: Equity Compensation
- **Data type**: Money
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.2.5.10. Strike Price

Description

Returns the strike price.

- **Code name**: `strikePrice`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Number datatype reference.

7.3.2.5.11. Total Shares

Description

Returns the total number of shares issued, both vested and unvested.

- **Code name**: `totalShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.2.5.12. Total Org Shares

Description

Returns the total number of Org shares.

- **Code name**: `totalOrgShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Number datatype reference.

7.3.2.5.13. Unvested Shares

Description

Returns the total number of shares that have been issued, but not vested.

- **Code name**: `unvestedShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.2.5.14. Unvested Value

Description

Returns the total value of all shares that have been issued, but not vested.

- **Code name**: `unvestedValue`
- **Sensitivity**: Equity Compensation
- **Data type**: Money
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Number datatype reference.

7.3.2.5.15. Vested Shares

Description

Returns the total number of shares issued that have vested.

- **Code name**: `vestedShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.2.5.16. Vested Value

Description

Returns the total value, based on current stock price, that has vested from issued equity grants.

- **Code name**: `vestedValue`
- **Sensitivity**: Equity Compensation
- **Data type**: Money
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Number datatype reference.

7.3.2.5.17. Vest Shares - Upcoming Year

Description

Returns the number of shares the an Org member is vesting over the upcoming year.

- **Code name**: `nextYearVestShares`
- **Sensitivity**: Equity Compensation
- **Data type**: Number
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the **Number** datatype reference.

7.3.2.5.18. Vest Value - Upcoming Year

Description

Returns the value, based on current stock price, of the shares an Org member is vesting over the upcoming year.

- **Code name**: `nextYearVestValue`
- **Sensitivity**: Equity Compensation
- **Data type**: Money
- **Data category**: Equity Compensation
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field contains several properties that can be found under the Money datatype reference.

7.3.3. Job Changes

Includes fields related to updates in job status including promotions, changes, and departures.

Fields

Field name	Description	Field code
Current Change		`change`
Data Fields		`data`
Depart Type		`depart`
Promotion		`promotion`
Change Reason	Returns the reason for a departure.	`reason`
Depart Regret	Returns the state of `regret` of an Org member.	`regret`
Changed in Scenario	Returns a list of changes in a given Scenario.	`scenario`
Update Type	Returns the update type.	`update`

7.3.3.1. Current Change

- **Code name**: `change`
- **Sensitivity**: Org Public
- **Data type**: Object
- **Data category**: Changes
- **Entity type**: None
- **Read only:** Yes

7.3.3.2. Base Comp Changes

Description

Returns a list of the changes to the person's base compensation over time, in chronological order. This is intended to give you access to the person's base compensation history.

- **Code name**: `baseCompChanges`
- **Sensitivity**: Org Public
- **Data type**: Object
- **Data category**: Changes
- **Entity type**: None
- **Read only:** Yes

Fields

`baseCompChanges` returns a list of *CompChange* objects, each of which has the following fields:

- **date** (Date) – the date the compensation change took effect.
- **baseComp** (PayInterval) – the new base compensation that took effect on the specified date, returned as a PayInterval.

Usage Examples

Code	Description
`baseCompChanges.first.baseComp`	Return the job's original (first ever) base compensation amount.
`baseCompChanges.last.date`	Return the date of the job's last base comp adjustment.
`baseCompChanges == []`	Jan. 1 - new open job is created.
`baseCompChanges == [ CompChange{ date: Jan 2, baseCompcomp{…}} ]`	Jan 2 - Sally fills the job and her baseComp.yearly is set to $100,000
`baseCompChanges == []`	Feb 1 - Sally departs
`baseCompChanges == [ CompChange{ date: March 1, baseCompcomp{…}} ]`	March 1 - Sam fills the job and his baseComp.yearly is set to $100,000
`baseCompChanges == [ CompChange{ date: March 1, baseCompcomp{…}} , CompChange{ date: April 1, baseCompcomp{…}} ]`	April 1 - Sam gets a pay adjustment. His new baseComp.yearly is $110,000

Additional Notes

- `baseCompChanges` for open jobs returns an empty list [].
- `baseCompChanges` for jobs that were backfills but are now filled by a new person will *only* return the base comp changes for .

7.3.3.3. Data Fields

- **Code name:** `data`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** Yes

7.3.3.4. Depart Type

Description

Returns the type of departure of a terminated employee. `depart` can be `Voluntary` or `Involuntary`.

- **Code name**: `depart`
- **Sensitivity**: Manager-only
- **Data type**: Enum
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** No

7.3.3.5. Promotion

- **Code name**: `promotion`
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** No

7.3.3.6. Change Reason

Returns the reason for a departure. `reason` can be `Attendance`, `Business Direction`, `Career Opportunity`, `Compensation`, `Culture`, `Death`, `Education`, `End of Contract`, `Lack of Advancement`, `Lack of Recognition`, `Lack of Work`, `Layoff`, `Manager`, `Misconduct`, `Moving`, `Mutual Agreement`, `No-Show`, `Other Job`, `Performance`, `Personal/Family`, `Poached`, `Reduction in Force`, `Retirement`, `Seasonal`, `Theft`, `Transferred`, `Work Conditions`, or `Work-Life Balance`.

- **Code name**: `reason`
- **Sensitivity**: Manager-only
- **Data type**: Enum
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** No

7.3.3.7. Depart Regret

Description

Returns the state of `regret` of an Org member. `regret` can be `regret` or `nonregret`.

- **Code name**: `regret`
- **Sensitivity**: Manager-only
- **Data type**: Enum
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** No

7.3.3.8. Changed in Scenario

Description

Returns a list of changes in a given Scenario.

- **Code name**: `scenario`
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** Yes

7.3.3.9. Update Type

Description

Returns the update type.

- **Code name**: `update`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Changes
- **Entity type:** Change
- **Read only:** Yes

7.3.4. Permissions

Includes fields related to access level permissions and data sensitivity.

Fields

Field name	Description	Field code
Can this person approve this change?	Returns a boolean (yes/no) value indicating whether an Org member has permission to approve changes in Scenarios.	`canApproveChange`
Can this user edit this job?	Returns a boolean (yes/no) value indicating whether an Org member has permission to edit jobs.	`canEditJob`
Data Access	Returns all data access permissions associated with a record.	`dataAccess`
Data Access Sensitive		`dataAccessSensitive`
Sensitivity		`sensitivity`

7.3.4.1. Can this person approve this change?

Description

Returns a boolean (yes/no) value indicating whether an Org member has permission to approve changes in Scenarios.

- **Code name**: `canApproveChange`
- **Sensitivity**: Org Public
- **Data type**: Boolean
- **Data category**: Permissions
- **Entity type:** Change
- **Read only:** Yes

7.3.4.2. Can this user edit this job?

Description

Returns a boolean (yes/no) value indicating whether an Org member has permission to edit jobs.

- **Code name**: `canEditJob`
- **Sensitivity**: Org Public
- **Data type**: Boolean
- **Data category**: Permissions
- **Entity type:** Job
- **Read only:** Yes

7.3.4.3. Data Access

Description

Returns all data access permissions associated with a record.

- **Code name**: `dataAccess`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Permissions
- **Entity type:** Job
- **Read only:** Yes

7.3.4.4. Data Access Sensitive

- **Code name**: `dataAccessSensitive`
- **Sensitivity**: Org Public
- **Data type**: String
- **Data category**: Permissions
- **Entity type:** Job
- **Read only:** Yes

7.3.4.5. Sensitivity

- **Code name**: `sensitivity`
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Permissions
- **Entity type:** Job
- **Read only:** Yes

7.3.5. Personal

Fields that reference the profile, address, and external ATS, payroll, and equity information for members in a ChartHop organization.

Categories

Name	Description
Address	Fields that reference the address information of ChartHop organization members.
External apps	Fields that reference I.D.s connecting ChartHop organization members to various external apps.
Member profile	Fields related to an org member's profile including name, gender, and contact information.

7.3.5.1. Address

Fields that reference the address information of ChartHop organization members.

City

Field name	Field code
City - Home Address	`address.city`
City - Remote Address	`remoteWorkAddress.city`
City - Work Address	`workAddress.city`

Country

Field name	Field code
Country - Home Address	`address.country`
Country - Remote Address	`remoteWorkAddress.country`
Country - Work Address	`workAddress.country`

Full address

Full - Home Address	`address`
Full - Remote Address	`remoteWorkAddress`
Full - Work Address	`workAddress`

Latitude

Field name	Field code
Latitude - Home Address	`address.lat` `address.lat` `address.lat`
Latitude - Remote Address	`remoteWorkAddress.lat`
Latitude - Work Address	`workAddress.lat`

Longitude

Field name	Field code
Longitude - Home Address	`address.lng`
Longitude - Remote Address	`remoteWorkAddress.lng`
Longitude - Work Address	`workAddress.lng`

State

Field name	Field code
State - Home Address	`address.state`
State - Remote Address	`remoteWorkAddress.state`
State - Work Address	`workAddress.state`

Street

Field name	Field code
Street 1 - Home Address	`address.street1`
Street 1 - Remote Address	`remoteWorkAddress.street1`
Street 1 - Work Address	`workAddress.street1`
Street 2 - Home Address	`address.street2`
Street 2 - Remote Address	`remoteWorkAddress.street2`
Street 2 - Work Address	`workAddress.street2`
Street 3 - Home Address	`address.street3`
Street 3 - Remote Address	`remoteWorkAddress.street3`
Street 3 - Work Address	`workAddress.street3`

Zip/Postal

Field name	Field code
Zip/Postal - Home Address	`address.postal`
Zip/Postal - Remote Address	`remoteWorkAddress.postal`
Zip/Postal - Work Address	`workAddress.postal`

7.3.5.1.1. City - Home Address

- **Code name**: `address.city`
- **Sensitivity**: Personal (contact)
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.2. City - Work Address

- **Code name**: `workAddress.city`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.3. City - Remote Address

- **Code name**: `remoteWorkAddress.city`
- **Sensitivity**: Org public
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.4. Country - Home Address

- **Code name**: `address.country`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

Usage examples

Code	Description
`address.country="US"`	Returns members who's home address is in the United states.
`address.country="SG"`	Returns members who's home address is in Singapore.
`address.country="MX"`	Returns members who's home address is in the Mexico.

7.3.5.1.5. Country - Remote Address

- **Code name**: `remoteWorkAddress.country`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

Usage examples

Code	Description
`remoteWorkAddress.country="US"`	Returns members who's remote work address is in the United states.
`remoteWorkAddress.country="SG"`	Returns members who's remote work address is in Singapore.
`remoteWorkAddress.country="MX"`	Returns members who's remote work address is in the Mexico.

7.3.5.1.6. Country - Work Address

- **Code name**: `workAddress.country`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

Usage examples

Code	Description
`workAddress.country="US"`	Returns members who's work address is in the United states.
`workAddress.country="SG"`	Returns members who's work address is in Singapore.
`workAddress.country="MX"`	Returns members who's work address is in the Mexico.

7.3.5.1.7. Full - Home Address

- **Code name**: `address`
- **Sensitivity**: Personal (contact)
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.8. Full - Remote Address

- **Code name**: `remoteWorkAddress`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.9. Full - Work Address

- **Code name**: `workAddress`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.10. Latitude - Home Address

- **Code name**: `address.lat`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.11. Latitude - Remote Address

- **Code name**: `remoteWorkAddress.lat`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.12. Latitude - Work Address

- **Code name**: `workAddress.lat`
- **Sensitivity**: Org public
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.13. Longitude - Home Address

- **Code name**: `address.lng`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.14. Longitude - Remote Address

- **Code name**: `remoteWorkAddress.lng`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.15. Longitude - Work Address

- **Code name**: `workAddress.lng`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.16. State - Home Address

- **Code name**: `address.state`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.17. State - Remote Address

- **Code name**: `remoteWorkAddress.state`
- **Sensitivity**: Org public
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.18. State - Work Address

- **Code name**: `workAddress.state`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.19. Street 1 - Home Address

- **Code name**: `address.street1`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.20. Street 1 - Remote Address

- **Code name**: `remoteWorkAddress.street1`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.21. Street 1 - Work Address

- **Code name**: `workAddress.street1`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.22. Street 2 - Home Address

- **Code name**: `address.street2`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.23. Street 2 - Remote Address

- **Code name**: `remoteWorkAddress.street2`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.24. Street 2 - Work Address

- **Code name**: `workAddress.street2`
- **Sensitivity**: Org public
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.25. Street 3 - Home Address

- **Code name**: `address.street3`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.26. Street 3 - Remote Address

- **Code name**: `workAddress.street3`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.27. Street 3 - Work Address

- **Code name**: `workAddress.street3`
- **Sensitivity**: Org public
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.28. Zip/Postal - Home Address

- **Code name**: `address.postal`
- **Sensitivity**: Personal (contact)
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.1.29. Zip/Postal - Remote Address

- **Code name**: `workAddress.postal`
- **Sensitivity**: Org public
- **Data type**: **Address**
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the **Address** data type.

7.3.5.1.30. Zip/Postal - Work Address

- **Code name**: `workAddress.postal`
- **Sensitivity**: Org public
- **Data type**: Address
- **Data category**: Personal
- **Entity type:** Personal
- **Read only:** No
- **Properties**: This field inherits the properties of the Address data type.

7.3.5.2. External apps

Fields that reference I.D.s connecting ChartHop organization members to various external apps.

App fields

Field name	Field code
ADP ID	`contact.adp`
ALPHASTAFF ID	`contact.alphastaff`
Bamboo ID	`contact.bamboo`
Finch ID	`contact.finch`
Greenhouse ID	`contact.greenhouse`
Gusto ID	`contact.gusto`
Humaans ID	`contact.humaans`
Jobvite ID	`contact.jobvite`
Lever ID	`contact.lever`
Namely ID	`contact.namely`
Okta ID	`contact.okta`
Paylocity ID	`contact.paylocity`
Prism ID	`contact.prism`
Rippling ID	`contact.rippling`
SFactors ID	`contact.successfactors`
Sapling ID	`contact.sapling`
Trinet ID	`contact.trinet`
Ultipro ID	`contact.ultipro`
Workday ID	`contact.workday`
Zenefits ID	`contact.zenefits`

7.3.5.2.1. ADP ID

- **Code name**: `contact.adp`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.2. ALPHASTAFF ID

- **Code name**: `contact.alphastaff`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.3. Bamboo ID

- **Code name**: `contact.bamboo`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.4. Finch ID

- **Code name**: `contact.finch`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.5. Greenhouse ID

- **Code name**: `contact.greenhouse`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.6. Gusto ID

- **Code name**: `contact.gusto`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.7. Humaans ID

- **Code name**: `contact.humaans`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.8. Jobvite ID

- **Code name**: `contact.jobvite`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.9. Lever ID

- **Code name**: `contact.lever`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.10. Namely ID

- **Code name**: `contact.namely`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.11. Okta ID

- **Code name**: `contact.okta`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.12. Paylocity ID

- **Code name**: `contact.paylocity`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.13. Prism ID

- **Code name**: `contact.prism`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.14. Rippling ID

- **Code name**: `contact.rippling`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.15. SFactors ID

- **Code name**: `contact.successfactors`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.16. Sapling ID

- **Code name**: `contact.sapling`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.17. Trinet ID

- **Code name**: `contact.trinet`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.18. Ultipro ID

- **Code name**: `contact.ultipro`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.19. Workday ID

- **Code name**: `contact.workday`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.2.20. Zenefits ID

- **Code name**: `contact.zenefits`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.3. Member profile

Fields related to an org member's profile including name, gender, and contact information.

Member profile fields

Field name	Description	Field code
Active Days (Last 30)	Returns the number of days a user (including Org members) has been active in the last thirty days.	`userActiveDays` `userActiveDays`
Birth Date	The person's date of birth or birthday.	`birthDate`
Employee ID		`contact.employee`
Ethnicity	Self-reported ethnicity, categorized as per EEOC definitions.	`ethnicity`
First Name		`name.first`
Gender	Self-reported gender identification.	`gender`
Generation	The generation that the person falls into, based on their date of birth. (Date ranges and generations as defined by the Pew Research Center.)	`generation`
GitHub		`contact.github`
Home Phone		`contact.homePhone`
Home email		`contact.homeEmail`
Last Name		`name.last`
LinkedIn		`contact.linkedin`
Middle Name		`name.middle`
Mobile		`contact.mo`

Field name	Description	Field code
		`bilePhone`
Preferred First Name		`name.pref`
Preferred Last Name		`name.preflast`
Preferred Name		`name.preferred`
Twitter		`contact.twitter`
Work email		`contact.workEmail`
Work phone		`contact.workPhone`

7.3.5.3.1. Active Days (Last 30)

Returns the number of days a user (including Org members) has been active in the last thirty days.

- **Code name**: `userActiveDays`
- **Sensitivity**: Manager shared
- **Data type**: Number
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.5.3.2. Birth Date

The person's date of birth or birthday.

- **Code name**: `birthDate`
- **Sensitivity**: Manager shared
- **Data type**: Date
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes
- **Properties**: None.

> When birth date fields are set to **Personal**, no other employees except those with access to sensitive data can see the year.

Example usage

Code example	Description
`08/12`	Birth date omitting the year.
`08/12/2022`	Birth date including the year. **Viewable by those with sensitive access only.**

7.3.5.3.3. Employee ID

- **Code name**: `contact.employee`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** Yes

7.3.5.3.4. Ethnicity

Description

Returns the self-reported ethnicity, categorized as per EEOC definitions for an employee.

- **Code name**: `ethnicity`
- **Sensitivity**: Personal
- **Data type**: Enum
- **Data category**: Demographic
- **Entity type:** Person
- **Read only:** No

Example usage

Code example	Description
`ethnicity='White'`	Filter's criteria where an employee's ethnicity is White.
`ethnicity='Black'`	Filter's criteria where an employee's ethnicity is Black. Filter's criteria where an employee's ethnicity is White. Filter's criteria where an employee's ethnicity is White.
`ethnicity:asian`	Filter's criteria where an employee's ethnicity is Asian.

7.3.5.3.5. First name

- **Code name**: `name.first`
- **Sensitivity**: Org public
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.6. Gender

Self-reported gender identification.

- **Code name**: `gender`
- **Sensitivity**: Org public
- **Data type**: *Single Select*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.7. Generation

The generation that the person falls into, based on their date of birth. (Date ranges and generations as defined by the Pew Research Center.)

- **Code name**: `generation`
- **Sensitivity**: Personal
- **Data type**: *Smart bucket*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.8. GitHub

- **Code name**: `contact.github`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.9. Home Phone

Description

Personal home phone number.

- **Code name**: `contact.homePhone`
- **Sensitivity**: Personal (contact)
- **Data type**: *Phone*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

Usage examples

Values	Type
555-555-5555	Local
+44-555-555-5555	International

7.3.5.3.10. Home email

Description

Personal email address.

- **Code name**: `contact.homeEmail`
- **Sensitivity**: Personal (contact)
- **Data type**: *Email*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.11. Last name

- **Code name**: `name.last`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.12. LinkedIn

- **Code name**: `contact.homePhone`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.13. Middle name

- **Code name**: `middle.name`
- **Sensitivity**: Org public
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.14. Mobile

- **Code name**: `contact.mobilePhone`
- **Sensitivity**: Personal (contact)
- **Data type**: *Phone*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.15. Preferred First Name

- **Code name**: `name.pref`
- **Sensitivity**: Org public
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.16. Perferred Last Name

- **Code name**: `name.preflast`
- **Sensitivity**: Org public
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.17. Preferred Name

- **Code name**: `name.preferred`
- **Sensitivity**: Org public
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.18. Twitter

- **Code name**: `contact.twitter`
- **Sensitivity**: Personal (contact)
- **Data type**: *Short text*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.19. Work email

Description

Work email address.

- **Code name**: `contact.workEmail`
- **Sensitivity**: Org public
- **Data type**: *Email*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

7.3.5.3.20. Work phone

Description

Work phone number.

- **Code name**: `contact.workPhone`
- **Sensitivity**: Org public
- **Data type**: *Phone*
- **Data category**: Personal
- **Entity type:** Person
- **Read only:** No

Usage examples

Values	Type
555-555-5555	Local
+44-555-555-5555	International

7.3.6. Recruiting

Contains fields related to recruiting metrics such as backfills, offers, recruiting statuses, and hiring dates.

Fields

Field name	Description	Code name
Active (Days)		`daysActive`
Annual Budget Cost		`budgetCost`
Backfill For	Returns Org member for whom an open role is a backfill.	`backfill`
Backfill Job	Returns whether a job should be backfilled at all. (Yes/No).	`backfillJob`
Candidates (Active)		`applyActive`
Hiring Manager		`hireMgr`
Interviews (Active)		`applyInterview`
Lever Req ID		`leverReqId`
Offer Accept Date		`offerAcceptDate`
Offers (Active)		`applyOffer`
Offers (Total)		`applyTotalOffer`
Open (days)	Returns the number of days that Job has been `open`, even if not actively recruiting.	`daysOpen`

Field name	Description	Code name
Priority (Recruiting)	The relative priority of hiring an open job.	`recruitPriority`
Recruit Active Date		`recruitActiveDate`
Recruiter	The person who is responsible for recruiting this role. Can be set to "External Recruiter" to mark external recruiters.	`recruiter`
Recruiting	The status of an open job, where: • **Active** means the job is being recruited for • **Passive** means inbound candidates are being reviewed, but no active search is in progress • **Inactive** means the role is currently not being recruited • **Offer** means an offer is out but not yet accepted • **Pending** means someone is hired to start	`recruit`
Time to Fill (days)	Measured as the time between starting active recruitment for a role (e.g., job posting published) and having an offer acceptance or: ***Offer Accept Date*** - ***Recruit Active Date***	`fillDays`
Recruit Active Date	The date that active recruitment started.	`recruitActiveDate`
Offer Accept Date	The date that an offer was accepted.	`offerAcceptDate`

7.3.6.1. Active (Days)

Description

Returns the number of days that a Job has been open and active for recruiting.

- **Code name**: `daysActive`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.6.2. Annual Budget Cost

- **Code name**: `budgetCost`
- **Sensitivity**: Limited (Cash compensation)
- **Data type**: Money
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Money data type.

7.3.6.3. Backfill For

Description

Returns Org member for whom an open role is a backfill.

- **Code name**: `backfill`
- **Sensitivity**: Org public
- **Data type**: Person
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Person data type.

7.3.6.4. Backfill Job

Description

Returns whether a job should be backfilled at all. (Yes/No).

- **Code name**: `backfillJob`
- **Sensitivity**: Org public
- **Data type**: Person
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Person data type.

7.3.6.5. Candidates (Active)

- **Code name**: `applyActive`
- **Sensitivity**: Org public
- **Data type**: Number
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.6.6. Hiring Manager

- **Code name**: `hireMgr`
- **Sensitivity**: Org public
- **Data type**: Person
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Person data type.

7.3.6.7. Interviews (Active)

- **Code name**: `applyInterview`
- **Sensitivity**: Org public
- **Data type**: Number
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.6.8. Lever Req ID

- **Code name**: `leverReqId`
- **Sensitivity**: Org public
- **Data type**: *Short Text*
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes

7.3.6.9. Offer Accept Date

- **Code name**: `offerAcceptDate`
- **Sensitivity**: Org public
- **Data type**: Addressate
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Addressate data type

7.3.6.10. Offers (Active)

- **Code name**: `applyOffer`
- **Sensitivity**: Org public
- **Data type**: Number
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.6.11. Offers (Total)

- **Code name**: `applyTotalOffer`
- **Sensitivity**: Org public
- **Data type**: Number
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.6.12. Open (days)

Description

Returns the number of days that Job has been `open`, even if not actively recruiting.

- **Code name**: `daysOpen`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Number data type.

7.3.6.13. Priority (Recruiting)

Description

The relative priority of hiring an open job.

- **Code name**: `recruitPriority`
- **Sensitivity**: Org Public
- **Data type**: *Numeric Scale*
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes

7.3.6.14. Recruit Active Date

- **Code name**: `recruitActiveDate`
- **Sensitivity**: Org public
- **Data type**: **Addressate**
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the **Addressate** data type

7.3.6.15. Recruiter

Description

The person who is responsible for recruiting this role. Can be set to "External Recruiter" to mark external recruiters.

- **Code name**: `recruiter`
- **Sensitivity**: Org Public
- **Data type**: Person
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes
- **Properties**: This field inherits the properties of the Person data type.

7.3.6.16. Recruiting

Description

Returns the following status of an open job:

Status	Description
Active	The role is being recruited for.
Passive	Inbound candidates are being reviewed, but no active search is in progress,
Inactive	The role is currently not being recruited.
Offer	An offer is out for the role but is not yet accepted.
Pending	Someone is hired to start the role.

- **Code name**: `recruit`
- **Sensitivity**: Org Public
- **Data type**: *Single select*
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes

7.3.6.17. Time to Fill (days)

Description

Measured as the time between starting active recruitment for a role (e.g., job posting published) and having an offer acceptance or: ***Offer Accept Date*** - ***Recruit Active Date***

- **Code name**: `fillDays`
- **Sensitivity**: Org Public
- **Data type**: *Smart Calculation*
- **Data category**: Recruiting
- **Entity type:** Job
- **Read only:** Yes

7.3.6.18. Recruit Active Date

Description

The date that active recruitment started.

- **Code name**: `recruitActiveDate`
- **Sensitivity**: Org public
- **Data type**: Addressate
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Addressate data type

7.3.6.19. Offer Accept Date

Description

The date that an offer was accepted.

- **Code name**: `offerAcceptDate`
- **Sensitivity**: Org public
- **Data type**: Addressate
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Addressate data type

7.3.7. Structure

Contains a collection of fields relating to the overall structure of your ChartHop organization.

Categories

Category	Description
Dates	Fields related to job employment start/end dates, anniversaries, and tenure.
Groups	Fields related to groups and departments.
Headcount	Fields related to headcount planning such as job and employee counts.
Management	Fields related to ChartHop organization managerial structure like reporting hierarchies, manager counts, and direct/indirect reports.
Organization	Fields related to general ChartHop organization structure including placements and org member hierarchy.

7.3.7.1. Dates

Fields related to job employment start/end dates, anniversaries, and tenure.

Fields

Field name	Function	Field code
Anniversary	Returns an Org member's work anniversary.	`anniversary`
Create Date	Returns the date the job was created.	`createDate`
End Date in Job	The date that the Person left the job.	`endDateJob`
End Date at Org	The date that the Person left the organization.	`endDateOrg`
Job Start Date	Returns the Start Date of a Job.	`jobStartDate`
Last Promotion	Returns the date when the most recent promotion occurred.	`promotionDate`
Start Date	For filled jobs, the date the Person started at the organization, or for open jobs, the planned target start date.	`startDate`
Start Date in Job	The date that the Person started in the job.	`startDateJob`
Start Date at Org	The date that the Person started at the organization.	`startDateOrg`
Planned Start Date	For open roles, the intended target start date of the job. The field still remains once the job is hired.	`startDatePlanned`
Tenure in Job	The time in months that the Person has filled the Job.	`tenureJob`
Tenure at Org	The time in months that the Person has worked at the organization.	`tenureOrg`
Last Title Change	Returns the date of the most recent title change for an Org member.	`titleDate`

7.3.7.1.1. anniversary

Anniversary

Returns an Org member's next work anniversary, counting from the current date and comparing to their **startDateOrg** .

For example, if someone started on January 15th, 2022, and the current date is February 10th, 2024, this field will return `2025-01-15` (January 15th, 2025 -- the next occurrence of the anniversary).

- **Label:** Anniversary
- **Code name**: `anniversary`
- **Sensitivity**: Personal
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

See also

- **birthday** field
- **nextAnniversary()** function

7.3.7.1.2. birthday

Birthday

Returns an org member's next upcoming birthday, counting from the current date and comparing to their **Birth Date**.

This is functionally equivalent to calling `nextAnniversary(birthDate)`. Note that `birthDate` is the raw stored date of birth, while `birthday` is a **computed, read-only field** that always returns the *next* occurrence of that date going forward.

For example, if someone was born on January 15th, and today is February 10th, 2026, this field will return `2027-01-15` (their next upcoming birthday). If today *is* their birthday, the field returns today's date.

- **Label:** Birthday
- **Code name**: `birthday`
- **Sensitivity**: Org Public (note: the underlying **Birth Date** field has a higher sensitivity level)
- **Data type**: **Date**
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

CQL Usage Examples

Find everyone whose birthday is today:

```
birthday = today
```

Find everyone with an upcoming birthday in the next 30 days:

```
birthday >= today and birthday <= '+30d'
```

Common Use Cases

- Setting up birthday announcements via Slack actions
- Filtering for upcoming birthdays in Data Sheet views
- Adding birthday events to org calendars

See also

- **Birth Date** field
- **nextAnniversary()** function
- **Birthday announcements**

7.3.7.1.3. createDate

Create Date

The date the Job was created.

- **Label:** Create Date
- **Code name**: `createDate`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.1.4. endDateJob

End Date in Job

The date that the Person left the job.

- **Label:** End Date in Job
- **Code name**: `endDateJob`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.1.5. endDateOrg

End Date at Org

The date that the Person left the organization.

- **Label:** End Date at Org
- **Code name**: `endDateOrg`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.1.6. promotionDate

Promotion Date

The date when the Person's most recent promotion occurred.

- **Label:** Promotion Date
- **Code name**: `promotionDate`
- **Sensitivity**: Manager-Shared
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Person
- **Read only:** Yes

7.3.7.1.7. startDate

Start Date

For filled Jobs, the date the Person started at the organization (same as **startDateOrg**), or for open Jobs, the planned target start date (same as **startDatePlanned**)

- **Label:** Start Date
- **Code name:** `startDate`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

See also

- **startDateOrg**
- **startDatePlanned**
- **startDateLifetime**

Selecting the correct Start Date field

Field	Code	Description	Usage
Start Date	startDate, personStartDate	For filled Jobs, the date the Person started at the organization (same as **startDateOrg**), or for open Jobs, the planned target start date (same as **startDatePlanned**)	The most general start date field.
Start date at org	startDateOrg, startDateAtOrg	The most recent date that the Person started at the organization, or `null` for open jobs.	General usage for typical start dates for people.
Start date (Lifetime)	startDateLifetime	The original date that the Person first started at the organization, regardless of any rehires.	When working with any situations that may involve rehires use this field.
Start date in job	startDateJob, startDateActual	The date that the Person started in their current Job, whether that was through a hire or an internal move/transfer.	For understanding **tenureJob** or how long people have been in a position.
Offer Start Date	offerStartDate	Often synced from the ATS, lists when the offer listed as the start date	Allows tracking of instances where start dates changed from offer.
Planned Start Date	startDatePlanned, jobStartDate	For open jobs, the intended target start date of the job. The field still remains once the job is hired.	During org planning for forecasting start dates of planned roles.

7.3.7.1.8. startDateJob

Start Date in Job

The date that the Person started in their current Job, whether that was through a hire or an internal move/transfer.

- **Code name**: `startDateJob`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Date data type.

See also

- startDateOrg
- startDatePlanned

7.3.7.1.9. startDateLifetime

Start Date (Lifetime)

Similar to **tenureLifetime**, this returns the "original" start date for a Person started at the organization, or `null` for open jobs. This will look for the date of the first time the person was hired into the organization

- **Label:** Start date (Lifetime)
- **Code name**: `startDateLifetime`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** People
- **Read only:** No

7.3.7.1.10. startDateOrg

Start Date at Org

The most recent date that the Person started at the organization, or `null` for open jobs.

- **Label:** Start date at org
- **Code name**: `startDateOrg`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

For the *first* start date at the org, see **startDateLifetime**.

7.3.7.1.11. startDatePlanned

Planned Start Date

For open roles, the intended target start date of the job. The field still remains once the job is hired.

- **Label:** Planned Start Date
- **Code name**: `startDatePlanned`
- **Sensitivity**: Org Public
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.1.12. tenure

Tenure

The number of months that the Person has worked at the organization, from their most recent **startDate** when they were hired.

- **Label:** Tenure
- **Field Code:** `tenure`
- **Aliases:** `tenureOrg`
- **Data Type:** **Number**
- **Entity Type:** **Person**
- **Sensitivity:** Org Public
- **Category:** Structure
- **Time Tracked:** Yes
- **Calculated:** Yes

See Also

- **tenureJob**
- **tenureLifetime**

7.3.7.1.13. tenureJob

Tenure in Job

The time in months that the Person has been in their current Job.

- **Label:** Tenure in Job
- **Code name:** `tenureJob`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.1.14. tenureLifetime

Tenure (Lifetime)

The total time in months that the Person has worked at the organization since the very beginning, incorporating multiple periods of service (departures and re-hires).

For example, someone who was hired on January 1, 2022, departed on September 1, 2022 (8 months of service), re-hired on March 1, 2024, and departed on March 1, 2025 (12 months of service), will have a `tenureLifetime` of 20 months.

- **Label**: Tenure (Lifetime)
- **Code name**: `tenureLifetime`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.1.15. titleDate

Last Title Change

Returns the date of the most recent title change for a Job.

- **Name:** Last Title Change
- **Code name**: `titleDate`
- **Sensitivity**: Sensitive
- **Data type**: Date
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.2. Groups

Fields related to groups and departments.

Fields

Field name	Function	Field code
Department	Returns the department to which an Org member belongs.	`department`
Location	Returns the location of an Org member's office or work location.	`location`
Band	Returns an Org member's organizational band.	`band`
Team	Returns the team to which an Org member belongs.	`team`

7.3.7.2.1. Department

Description

Returns the department an Org member is under.

- **Code name**: `department`
- **Sensitivity**: Org Public
- **Data type**: Group
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Group data type.

7.3.7.2.2. Location

Description

Returns the location of an Org member's office or work location.

- **Code name**: `location`
- **Sensitivity**: Org Public
- **Data type**: Group
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Group data type.

7.3.7.2.3. Band

Description

Returns an Org member's organizational band.

- **Code name**: `band`
- **Sensitivity**: Org Public
- **Data type**: Group
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Group data type.

7.3.7.2.4. Team

Description

Returns the team to which an Org member belongs.

- **Code name**: team
- **Sensitivity**: Org Public
- **Data type**: Group
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No
- **Properties**: This field inherits the properties of the Group data type.

7.3.7.3. Headcount

Fields related to headcount planning such as job and employee counts.

Fields

Field name	Function	Field code
Directs	Returns the number of direct Jobs, both filled and open.	`directJobCount`
Direct Persons	Returns the number of direct reports, not including open Jobs.	`directPersonCount`
Employment	Returns the employment type. employment can be `Full Time`, `Part Time`, `Temporary`, `Contract`, `Intern`, or `Ex-Pat`.	`employment`
Head Count	Returns the headcount.	`headcount`
Job Count	Returns the jobcount.	`jobcount`
Open	Returns the status of a Job. `open` can be either `open` or `filled`.	`open`

7.3.7.3.1. Direct Reports

There are several Carrot Fields for calculating various versions of direct reports:

Field Carrot Code	Aliases	Type	Description
`directJobCount`	`directs`, `directJobs`	Integer Number	The number of direct reports, including open jobs.
`directJobs`		Job	All of the jobs that report up to a person.
`directPersonCount`		Integer Number	The number of direct reports, excluding open jobs.
`directPersons`		Persons	All of the people who are direct reports of a person.
`indirectJobs`		Job	All of the indirect people that report up to a person.

Description

Returns the number of direct Jobs, both filled and open.

- **Code name**: `directJobCount`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

Example usage

Code example	Description
`directs>0`	Checks if the manager has at least 1 direct report (filled and open).
`directs=1`	Checks if the manager has exactly 1 direct report (filled and open).
`directs<4`	Checks if the manager has less than 4 direct reports (filled and open).

7.3.7.3.2. Direct Persons

Description

Returns the number of direct reports, not including open Jobs.

- **Code name**: `directPersonCount`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.3.3. Employment

Description

Returns the employment type. employment can be `Full Time`, `Part Time`, `Temporary`, `Contract`, `Intern`, or `Ex-Pat`.

- **Code name**: `employment`
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.3.4. Head Count

Description

Returns the headcount.

- **Code name**: `headcount`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Person
- **Read only:** Yes

7.3.7.3.5. Job Count

Description

Returns the jobcount.

- **Code name**: `jobcount`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Person
- **Read only:** Yes

7.3.7.3.6. Open

Description

Returns the status of a Job. `open` can be either `open` or `filled`.

- **Code name**: `open`
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.4. Management

Fields related to ChartHop organization managerial structure like reporting hierarchies, manager counts, and direct/indirect reports.

Fields

Field name	Function	Field code
Indirect Manager	Returns an Org member's indirect manager.	`indirect`
Managed Jobs	Returns the number of open and filled Jobs either directly or indirectly managed by an Org member.	`manageJobs`
Manager	Returns the manager of a particular Org member.	`manager`
Managers	Returns a list of the Org's reporting hierarchy from lowest to highest, with the highest level being the CEO.	`managers` `managerIds`
Manager Count	Returns the number of managers that a Job or Person has, from the Org head down.	`managerCount`
Manager or IC	Returns one of 2 values: "manager" or "IC based on whether the job is a manager or individual contributor.	`managerOrIC`

7.3.7.4.1. Indirect Manager

Description

Returns an Org member's indirect manager.

- **Code name**: `indirect`
- **Sensitivity**: Org Public
- **Data type**: Job
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.4.2. Managed Jobs

Description

Returns the number of open and filled Jobs directly managed by an Org member.

- **Code name**: `manageJobs`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.4.3. Manage Persons

Description

Returns the number of Persons (presently filled jobs) either directly or indirectly managed by an Org member.

- **Code name**: `managePersons`
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.4.4. Manager

Description

Returns the manager of a particular Org member.

- **Code name**: `manager`
- **Sensitivity**: Org Public
- **Data type**: Job
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

7.3.7.4.5. Managers

Description

Returns a list of the Org's reporting hierarchy from lowest to highest, with the highest level being the CEO.

- **Code alias**: `managers` `managerIds`
- **Sensitivity**: Org Public
- **Data type**: List
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

Example usage

Code	Description
`managers[0]`	Returns an Org member's immediate manager.
`managers[1]` or `grandManager`	Returns an Org member's grand manager (Manager's manager).
`managers.reversed[0]`	Returns the CEO of the Org.

7.3.7.4.6. Manager Count

Description

Returns the number of managers that a Job or Person has, from the Org head down.

- **Code name**: `managerCount`
- **Field name**: Manager Count
- **Sensitivity**: Org Public
- **Data type**: Number
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.4.7. Manager or IC

Description

Returns one of 2 values: "manager" or "IC based on whether the job is a manager or individual contributor.

Based on the calculation of `is:manager` and `is:ic` which can also each be used independently.

- **Code name**: `managerOrIC`
- **Field name**: Manager or IC
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.5. Organization

Fields related to general ChartHop organization structure including placements and org member hierarchy.

Fields

Field name	Function	Field code
Org		`org`
Placement	Returns the value of placement, which can be either `Normal` or `Assistant`.	`placement`
Relationships		`relationships`
State	Returns the value of `open`.	`state`
Reports Up To	Returns the organization under a particular Org member.	`under`
Reports Up To Including	Returns both the person being matched as well as the organization under them.	`underIncluding`

7.3.7.5.1. Org

Description

The Org object contains references to information that can be found in your ChartHop Organization's General settings.

- **Code name**: `org`
- **Sensitivity**: Org Public
- **Data type**: *Object*
- **Data category**: Structure
- **Entity type:** None
- **Read only:** Yes

Example usage

Code	Description
`org.name`	Returns the Org's name.
`org.slug`	Returns the Org's slug.
`org.currency`	Returns the Org's default currency.

7.3.7.5.2. Placement

Description

Returns the value of placement, which can be either `Normal` or `Assistant`.

- **Code name**: `placement`
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** No

Example usage

Code example	Description
`placement:normal`	Checks that placement is **normal**.
`placement:assistant`	Checks that placement is **assistant**.

7.3.7.5.3. Relationships

- **Code name**: `relationships`
- **Sensitivity**: Org Public
- **Data type**: Object
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.5.4. State

Description

Returns the value of `open`.

- **Code name**: state
- **Sensitivity**: Org Public
- **Data type**: Enum
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.7.5.5. Reports Up to

Description

Returns the organization under a particular Org member.

- **Code name**: `under`
- **Sensitivity**: Org Public
- **Data type**: JobList
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

Usage examples

Code	Description
`under:"John Smith"`	Returns a list of people who report up to a certain individual (John Smith).

7.3.7.5.6. Reports Up To Including

Description

Returns both the person being matched as well as the organization under them.

- **Code name**: `underIncluding`
- **Sensitivity**: Org Public
- **Data type**: JobList
- **Data category**: Structure
- **Entity type:** Job
- **Read only:** Yes

7.3.8. Time off

Includes fields related to time off including sick days, jury duty, vacation, etc.

Fields

Field name	Function	Field code
Days Off (All Types)	The number of days that the person has taken, or been approved, in the current calendar year.	`daysOff.all`
Days Off (Bereavement)	The number of days that the person has taken, or been approved, in the current calendar year -- bereavement only.	`daysOff.bereavement`
Days Off (In Lieu)	The number of days that the person has taken, or been approved, in the current calendar year -- time off in lieu.	`daysOff.toil`
Days Off (Jury Duty)	The number of days that the person has taken, or been approved, in the current calendar year -- jury duty days only.	`daysOff.jury`
Days Off (LT Disability)	The number of days that the person has taken, or been approved, in the current calendar year -- long term disability.	`daysOff.disabilityLong`
Days Off (Medical)	The number of days that the person has taken, or been approved, in the current calendar year -- medical only.	`daysOff.medical`
Days Off (Military)	The number of days that the person has taken, or been approved, in the current calendar year -- military only.	`daysOff.military`
Days Off (Offsite)	The number of days that the person has taken, or been approved, in the current calendar year -- offsite only.	`daysOff.offsite`
Days Off (Parental)	The number of days that the person has taken, or been approved, in the current calendar year -- maternity, paternity, or other parental leave.	`daysOff.parental`
Days Off (PTO)	The number of days that the person has taken, or been approved, in the current calendar year -- paid time off only.	`daysOff.pto`
Days Off (Religious)	The number of days that the person has taken, or been approved, in the current calendar year -- religious only.	`daysOff.religious`

Field name	Function	Field code
Days Off (Sick)	The number of days that the person has taken, or been approved, in the current calendar year -- sick days only.	`daysOff.sick`
Days Off (ST Disability)	The number of days that the person has taken, or been approved, in the current calendar year -- short term disability.	`daysOff.disabilityShort`
Days Off (Unknown)	The number of days that the person has taken, or been approved, in the current calendar year -- unknown only.	`daysOff.unknown`
Days Off (Unpaid)	The number of days that the person has taken, or been approved, in the current calendar year -- unpaid time off.	`daysOff.unpaid`
Days Off (Vacation)	The number of days that the person has taken, or been approved, in the current calendar year -- vacation only.	`daysOff.vacation`
Days Off (Voting)	The number of days that the person has taken, or been approved, in the current calendar year -- voting only.	`daysOff.voting`
Days Off Used (current year)	Returns a variety of data points related to days off **taken or approved** in the current year. Use the properties of the `DaysOff` datatype to pull relevant data.	`daysOff`
Days Off Taken (current year)	The number of days that the person has taken off so far in the current calendar year.	`daysOffTaken.all`
Days Off Upcoming (current year)	The number of days that the person has approved, but not yet taken, in the current calendar year.	`daysOffUpcoming.all`
Next Day Off	The soonest upcoming date that the person has approved to take off.	`nextDayOff`
Previous Day Off	The most recent date that the person has taken off.	`prevDayOff`

Field name	Function	Field code
Next Time Off	The summary of the person's soonest upcoming time off.	`nextTimeOff`
Previous Time Off	The summary of the person's most recent time off.	`prevTimeOff`

7.3.8.1. Days Off (All Types)

Description

The number of days that the person has taken, or been approved, in the current calendar year.

- **Code name**: `daysOff.all`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.2. Days Off (Bereavement)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- bereavement only.

- **Code name**: `daysOff.bereavement`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.3. Days Off (In Lieu)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- time off in lieu.

- **Code name**: `daysOff.toil`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.4. Days Off (Jury Duty)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- jury duty days only.

- **Code name**: `daysOff.jury`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.5. Days Off (LT Disability)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- long term disability.

- **Code name**: `daysOff.disabilityLong`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.6. Days Off (Medical)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- medical only.

- **Code name**: `daysOff.medical`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.7. Days Off (Military)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- military only.

- **Code name**: `daysOff.military`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.8. Days Off (Offsite)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- offsite only.

- **Code name**: `daysOff.offsite`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.9. Days Off (Parental)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- maternity, paternity, or other parental leave.

- **Code name**: `daysOff.parental`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.10. Days Off (PTO)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- paid time off only.

- **Code name**: `daysOff.pto`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.11. Days Off (Religious)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- religious only.

- **Code name**: `daysOff.religious`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.12. Days Off (Sick)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- sick days only.

- **Code name**: `daysOff.sick`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.13. Days Off (ST Disability)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- short term disability.

- **Code name**: `daysOff.disabilityShort`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.14. Days Off (Unknown)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- unknown only.

- **Code name**: `daysOff.unknown`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.15. Days Off (Unpaid)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- unpaid time off.

- **Code name**: `daysOff.unpaid`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.16. Days Off (Vacation)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- vacation only.

- **Code name**: `daysOff.vacation`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.17. Days Off (Voting)

Description

The number of days that the person has taken, or been approved, in the current calendar year -- voting only.

- **Code name**: `daysOff.voting`
- **Sensitivity**: Manager shared
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.18. Days Off Used (current year)

Description

Returns a variety of data points related to days off **taken or approved** in the current year. Use the properties of the `DaysOff` datatype to pull relevant data.

- **Code name**: `daysOff`
- **Sensitivity**: Sensitive
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.19. Days Off Taken (current year)

Description

The number of days that the person has taken off so far in the current calendar year.

- **Code name**: `daysOffTaken`
- **Sensitivity**: Sensitive
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.20. Days Off Upcoming (current year)

Description

The number of days that the person has approved, but not yet taken, in the current calendar year.

- **Code name**: `daysOffUpcoming`
- **Sensitivity**: Sensitive
- **Data type**: DaysOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.21. Next Day Off

Description

Returns the date of the next day off for an Org member.

- **Code name**: `nextDayOff`
- **Sensitivity**: Sensitive
- **Data type**: Date
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.22. Previous Day Off

Description

Returns the most recent day off for an Org member.

- **Code name**: `prevDayOff`
- **Sensitivity**: Sensitive
- **Data type**: Date
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.23. nextTimeOff

Returns the next time off for the person, or the time off currently being taken if the person is currently off.

- **Label**: Next Time Off
- **Sensitivity**: Manager Shared
- **Data type**: TimeOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.8.24. prevTimeOff

Returns the person's most recently taken time off.

- **Label**: Previous Time Off
- **Sensitivity**: Manager Shared
- **Data type**: TimeOff
- **Data category**: TimeOff
- **Entity type:** Person
- **Read only:** Yes

7.3.9. Data Types

Carrot understands many rich data types, including standard types such as **Number** and **String** that are common across systems, as well as a number of ChartHop-specific data types.

Basic Data Types

These data types are basic building blocks of the system.

Type	Description	Example Syntax
Boolean	A true or false value. (Also known as "Yes or No")	`true`
Currency	A national currency, such as the dollar or euro.	
Date	A date, independent of time.	`date('2025-01-01')`
Enum	A multiple-choice value selected by a user.	`enum("Meets Expectations")`
Image	An image stored on the ChartHop system	
Money	A monetary value, including currency and amount.	`money(1000, 'USD')`
List	Represents a list of any other value	`[1, 2, 3]`
Null	An empty value that means "data not set"	`null`
Number	A number, either decimal or integer.	`42.123`
Percent	A percentage value	`42%`
String	A piece of text.	`"Hello, world!"`
Timestamp	A moment in time (both date and time, timezone-independent)	

ChartHop Data Types

These data types represent more complex structures that can be used inside other fields.

Type	Description
Address	A mailing address, including street address, city, and postal code.
Name	The name of a person, including first, last, and preferred names.
PayInterval	A recurring pay rate, such as an hourly or yearly salary.
VariableComp	Target variable compensation, such as an annual bonus or commission target.

ChartHop Entity Types

These data types represent important objects within the ChartHop data model.

Entity Type	Description
Comp Band	A compensation band used to describe pay levels.
File	A file that has been uploaded into the ChartHop system, such as a document.
Group	An organizational unit comprising Jobs and People, such as a Department, Location, or Team.
Job	A set of responsibilities represented as a box on the org chart.
Person	A person, such as an employee.
Stock Grant	An equity or stock option grant issued to a Person.
Time Off	Time Off requested or taken by a Person, including paid and unpaid leave.
User	A user of the ChartHop system. This often represents the user-identity of a corresponding Person, but also might be an app or an external user who is not part of the organization.

7.3.9.1. FormAnswer

A `FormAnswer` represents a single question's answer extracted from a form submission. It is the return type of the `findAnswers*` family of CQL functions.

Unlike **FormResponse**, which represents an entire form submission with all its answers, a `FormAnswer` is focused on **one specific question** — making it easy to aggregate or analyze a single field across many submissions.

Properties

Property	Type	Description
`answerValue`	@Any	The value given for this question. The type depends on the question — for example, a numeric rating question returns a number, a text question returns a string.
`assessmentId`	String	The ID of the assessment cycle this response was part of, or `null` if the submission was not associated with an assessment
`formId`	String	The ID of the form the answer came from
`formResponseId`	String	The ID of the parent FormResponse this answer belongs to
`questionId`	String	The ID of the question this answer is for
`submitAt`	Timestamp	The timestamp the form was submitted
`submitPerson`	Person	The person who submitted the form, or `null` if anonymous
`target`	Person	The person the form was about (the target), or `null` if the form had no target

Usage Notes

`FormAnswer` is designed for **aggregation**. The most common pattern is to chain it with `.mean{}`, `.count()`, or `.groupBy{}` to derive insights from a specific question across many responses.

The `answerValue` property holds the raw answer value. For numeric questions (ratings, scores), you can use `.mean{answerValue}` directly. For enum/label questions, use `.groupBy{answerValue}.count()` to see the distribution.

Examples

```
findAnswers('managerReviewRating', '-365d').mean{answerValue}
```

Average manager review rating across the org over the past year.

```
findAnswersByAssessment('managerReviewRating', 'Q3 2024 Performance Review').groupBy{target.department}.mean{answerValue}
```

Average manager review rating per department within a specific assessment cycle.

```
findAnswersByTarget('peerFeedbackImpactRating', person, '-180d').count()
```

Number of peer feedback impact ratings submitted about the current person in the past 6 months.

See Also

- **FormResponse** — the full form submission object
- `findAnswers()` — retrieve answers for a question across the org
- `findAnswersByForm()` — scope answers to a specific form
- `findAnswersByAssessment()` — scope answers to a specific assessment cycle
- `findAnswersByTarget()` — scope answers about a specific person

7.3.9.2. Address

A *Carrot* datatype used by fields that store location data.

> The `Address` datatype is not currently supported in Custom Fields. Supported uses for the `Address` datatype are currently limited to the inbuilt `address`, `workAddress`, and `remoteWorkAddress` fields. `address` and `homeAddress` are interchangeable.

Properties

The `Address` datatype supports the following properties:

Property	Definition
*workAddress.**street1***	Returns value for ***line one*** of `workAddress`, ex. *233 S Wacker Dr.*
*workAddress.**street2***	Returns value for ***line two*** of `workAddress`, ex. *Unit 2805.*
*workAddress.**street3***	Returns value for ***line three*** of `workAddress`.
*workAddress.**city***	Returns value for ***city*** of `workAddress`, ex. *Chicago.*
*workAddress.**state***	Returns value for ***state*** of `workAddress`, ex. *Illinois.*
*workAddress.**country***	Returns value for ***country code*** of `workAddress`, ex. *US.*
*workAddress.**countryName***	Returns value for **country name** of `workAddress`, ex. *United States.*
*workAddress.**postal***	Returns value for ***postal code*** of `workAddress`, ex. *60606.*
*workAddress.**lat***	Returns value for ***latitude*** of `workAddress`, ex. *41.87901217911454.*
*workAddress.**lng***	Returns value for ***longitude*** of `workAddress`, ex. *-87.63587198599579.*

Sample usage

`address.state if address.country:"US"` returns the state if the address is in the United States.

7.3.9.3. Boolean

A *Carrot* datatype used by fields that store `true` and `false` values.

> The `Boolean` datatype is supported in Custom Fields. The only custom field of type `Boolean` is *Yes/No*.

Properties

The `Boolean` datatype supports the following properties:

Sample usage

`vaccinated = true` returns all records where the custom boolean field `vaccinated` has the value `true`.

7.3.9.4. Comp

A *Carrot* datatype used to store a job's total compensation.

> The `Comp` datatype is not currently supported in Custom Fields.

Properties

The `Comp` datatype supports the following properties:

Property	Definition
Comp.**currency**	Returns the currency associated with a job's comp.
Comp.**base**	Returns a job's base compensation amount.
Comp.**variable**	Returns a job's variable compensation amount.

7.3.9.5. Comp Band

A *Carrot* datatype that stores compensation band levels.

> The `Comp Band` datatype is not currently supported in Custom fields.

Properties

The `Comp Band` datatype supports the following properties:

Job Level

Field Name	Property	Definition	Examples
Comp Band - Job Family	`compBand.tier`	The top-level grouping of your compensation bands.	`Sales`, `Product`, `Engineering`
Comp Band - Job Level	`compBand.jobLevel`	The universal job level for the given band.	`Entry Level`, `Associate`, `Manager`

Equity

Field Name	Property	Definition	Examples
Comp Band Equity - Target (money)	`compBand.equityTargetValue`	The target equity amount, specified as a monetary value.	`$10,000`
Comp Band Equity - Target (shares)	`compBand.equityTargetShares`	The target equity amount, specified in number of shares.	`45`
Comp Band Equity - Target (percentage of base)	`compBand.equityTargetPercentOfBase`	The target equity amount, specified as a percentage of the job's actual base.	`5`

Base

Field Name	Property	Definition	Examples
Comp Band Base - Target	`compBand.baseTarget`	A guideline value for the band which may be different from the midpoint.	`100000`
Comp Band Base - Target Percentile	`compBand.baseTargetPercentile`	A guideline value for the band which may be different from the midpoint, specified as a percentile between baseMin and baseMax.	`75000`
Comp Band Base - Interval	`compBand.baseInterval`	The pay interval that the compensation range is specified in.	`Hourly`, `Salary`
Comp Band Base - Pay Range	`compBand.baseSpread`	The percentage above and below the midpoint that defines the upper and lower bounds of the band. For example, a value of 30% with a midpoint of 100,000 would create a pay range of 70,000-130,000.	`30`
Comp Band Base - Maximum	`compBand.baseMax`	The upper bound of the base compensation range.	`200000`
Comp Band Base - Maximum With Multipliers	`compBand.baseMax.withMultipliers`	The upper bound of the base compensation range, with all applicable multipliers applied.	`200000`
Comp Band Base - Minimum	`compBand.baseMin`	The lower bound of the base compensation range.	`80000`
Comp Band Base -	`compBand.baseMin.`	The lower bound of the base compensation range, with all applicable multipliers applied.	`75000`

Field Name	Property	Definition	Examples
Minimum With Multipliers	`withMultipliers`		
Comp Band Base - Midpoint	`compBand.baseMid`	The midpoint of the base compensation range.	`$100000`
Comp Band Base - Midpoint With Multipliers	`compBand.baseMid.withMultipliers`	The midpoint of the base compensation range, with all applicable multipliers applied.	`$110000`

Variable

Field Name	Property	Definition	Examples
Comp Band Variable - Target (money)	`compBand.variableValue`	The target variable pay amount, specified as a monetary value.	`$300000`
Comp Band Variable - Target (percentage of base)	`compBand.variablePercentOfBase`	The target variable pay amount, specified as a percentage of the job's actual base.	`25`

7.3.9.6. Currency

A *Carrot* datatype used by fields that store national currencies.

> The `Currency` datatype is not currently supported in Custom Fields. Supported uses for the `Currency` datatype are currently limited to the builtin `currency` field.

Properties

The `Currency` datatype does not support any user retrievable properties.

Sample usage

`currency:usd` returns all records where `currency`, a default field of type `Currency`, has a value of `usd`.

7.3.9.7. Date

Represents an exact date (year, month, and day).

Properties

Property	Type	Description	Example
`year`	Number	The calendar year	`1980`
`month`	Number	The month of the year (1-12)	`5`
`day`	Number	The day of the month (1-31)	`12`

Type Conversions

If the following types are used in place of a Date:

- Timestamp - uses the date of the timestamp after converting to the org's timezone
- String - parses the date, including supporting relative dates

See also

date() - converts into a Date

Relative Dates - syntax for expressing relative dates

7.3.9.8. DaysOff

A *Carrot* datatype used by inbuilt fields that store information about days off.

> The `DaysOff` datatype is not supported in Custom Fields/Forms. Supported uses for the `DaysOff` datatype are limited to the following inbuilt fields: `daysOff`, `daysOffTaken`, and `daysOffUpcoming`.

Properties

The `DaysOff` datatype supports the following properties:

Property	Definition
daysOff.**all**	Returns the total number of days off as a Number.
daysOff.**sick**	Returns the total number of sick days off as a Number.
daysOff.**pto**	Returns the Returns the total number of PTO days off as a Number.

7.3.9.9. Enum

An Enum represents one value out of a set of allowed values, each with a unique label.

This is the value type produced by the "Single Select", "Multiple Select", "Numeric Scale", and "Smart Bucket" field types.

Properties

Property	Type	Description
`label`	String	The label of the Enum value, for example `Meets Expectations`
`color`	String	The hex color code of the Enum value
`num`	Number	If the value comes from a Numeric Scale field, the numeric value of this value
`expr`	String	If the value comes from a Smart Bucket field, the Carrot formula expression of the bucket

Type Conversions

Enums that contain `num` values can be used in place of Number for math operations, and will be automatically converted to their numeric value.

- For example, you can call `mean(performanceRating1, performanceRating2)` to average together two different "performance rating" enums.

7.3.9.10. EnumList

A *Carrot* datatype used by fields as a collection of data.

> The `EnumList` datatype is supported in Custom Fields/Forms.

Properties

The `EnumList` datatype does not support any user retrievable properties.

7.3.9.11. File

A *Carrot* data type used by fields that store uploaded files.

> The `File` data type is supported in Custom fields and forms.

Properties

The `File` data type does not support any user retrievable properties.

Supported file types

The `File` data type supports the following file types:

- .txt
- .csv
- .pptx
- .pdf
- .png
- .jpg
- .xlsx
- .doc

> Audio and video file formats such as .wav and .mp4 are not supported.

Sample usage

`uploadedReport:*` returns all records where custom field `uploadedReport` has an uploaded file.

7.3.9.12. Group

A *Carrot* datatype used by fields that store group values.

> The `Group` datatype is not supported in Custom Fields/Forms. Supported uses for the `Group` datatype include Departments, Teams, Locations, and Bands.

Properties

The `Group` datatype supports the following properties:

Property	Definition
someGroup.**id**	Returns the group ID. Applicable to all group types.
someGroup.**name**	Returns the group name. Applicable to all group types.
someGroup.**code**	Returns the group code, ex. "CS." Applicable to all group types.
someGroup.**aliases**	Returns the group alias. Applicable to all group types.
someGroup.**address**	Returns the group address. Only applicable to Locations.
someGroup.**category**	Returns the group category. Only applicable to Departments. Interchangeable with Group.func.
someGroup.**func**	Returns the group function. Only applicable to Departments. Interchangeable with Group.category.
someGroup.**color**	Returns the group color. Applicable to all group types.
someGroup.**locationType**	Returns the location type. Only applicable to Locations.\
someGroup.**compMin**	Returns the minimum base value. Only applicable to Bands.
someGroup.**compMax**	Returns the maximum base value. Only applicable to Bands.
someGroup.**level**	Returns the group level. Only applicable to Bands.

Sample usage

`department:"customer service"` returns all records where `department`, a default field of type `Group`, has a value of `customer service`.

7.3.9.13. Image

A *Carrot* datatype used by fields that store uploaded images.

> The `Image` datatype is not supported in Custom Fields/Forms. Supported uses for the `Image` datatype are limited to profile pictures of employees.

Properties

The `Image` datatype does not support any user retrievable properties.

Sample usage

`image:*` returns all records where default field `image` has any stored image.

7.3.9.14. FormResponse

An entity object that represents a form response, including all individual answers within the form response.

Properties

Property	Type	Description
`approvalAt`	**Timestamp**	The timestamp of approval of the form response, or `null` if it was never approved
`approvalUser`	**User**	The user who approved
`answerValue`	@Map<**String**, @Any>	Map of answer values, by their Question ID and/or their field name
`date`	**Date**	The date the form was submitted
`form`	@Form	The form that was submitted
`formId`	**String**	The form ID
`releaseAt`	**Timestamp**	The timestamp that the form response was released, or `null` if it was never released
`releaseUser`	**User**	The user who released the form response
`status`	**Enum**	The status of the form response, where possible values can be: • `Active` • `Proposed` - submitted but not yet approved • `Unreleased` - submitted and potentially approved, but not yet released • `Rejected`
`submitAt`	**Timestamp**	The timestamp the form response was submitted
`submitPerson`	**Person**	The person who submitted the form
`target`	**Person**	The person who was the target of the form, or null if there was no target

7.3.9.15. Job

A *Carrot* datatype used by fields that store job values.

> The `Job` datatype is not supported in Custom Fields/Forms. Supported uses for the `Job` datatype are limited to open and filled roles.

Properties

The `Job` datatype supports the following properties:

7.3.9.16. List

A List of a number of objects, in order.

This datatype is often used to represent concepts such as a list of **Group**s, a list of **StockGrant**s, etc.

Properties

Property	Type	Description
`first`	Object	The first object in the sequence
`last`	Object	The last object in the sequence
`length`	**Number**	The number of entries contained in the Sequence
`reversed`	**Sequence**	The sequence, in reverse order

Indexing by Position

You can return each item of the list using `list[index]` syntax, starting numbering with `0` to represent the first item of the list.

- For example, `myList[2]` will return the third element in the list.

Representing Lists

To represent a List in an expression, you can use `[square brackets]` with commas to separate the elements.

- For example: `[1, 2, 3]` will represent a List containing the numbers 1, 2, and 3.
- `["Director", "VP"]` will represent a List containing the **String**s "Director" and "VP"

List and Equality Comparisons

The **= (equals)** operator will test for list membership when comparing a singular value to a list.

- For example, `["Director", "VP"] = "vp"` will return true, because "VP" (case-insensitive) is a member of the list.

7.3.9.17. Sequence

An internal representation of a stream of objects that behaves like a **List**.

The main difference between a Sequence and a List is that a Sequence performs more efficiently when operating on large sets of data. You can usually treat this like a List.

Properties

Property	Type	Description
`first`	Object	The first object in the sequence
`last`	Object	The last object in the sequence
`length`	**Number**	The number of entries contained in the Sequence
`reversed`	**Sequence**	The sequence, in reverse order

Sequences and Methods

Most commonly, a Sequence is used together with **Methods**, especially:

- @filter
- @limit
- @sort or @sortDesc

For example:

```
db.job.find{department:engineering}
```

Returns a Sequence of Jobs in the Engineering department.

To return the first 5 jobs with more than $100k in Base Comp, sorted in alphabetical order by Title, you could use:

```
db.job.find{department:engineering}.filter{baseComp > 100000}.sort{title}.limit(5}
```

7.3.9.18. PayInterval

A datatype used to represent a pay interval, which represents the amount and period that someone is paid -- for example, an annual salary or hourly rate.

Properties

Property	Type	Description
`amount`	Number	The amount of money, without the currency (same as `pay.amount`)
`annualized`	Money	The amount of money, converted to an annualized total.
`asOrgCurrency`	PayInterval	Converts the PayInterval to the org's default currency (using the current exchange rate in effect as-of the evaluation date).
`currency`	Currency	The currency being paid (same as `pay.currency`)
`hourly`	Money	The hourly rate if hourly, otherwise `null`
`hoursPerWeek`	Number	The number of expected hours per week (incorporated in `annualized` calculation)
`interval`	String	The interval being paid, either `year` or `hour`
`pay`	Money	The rate of pay
`weeksPerYear`	Number	The number of expected weeks per year (incorporated in `annualized` calculation)
`yearly`	Money	The yearly rate if yearly, otherwise `null`

Type Conversions and Money Math

If a Pay Interval is used together with Money in a formula, the Pay Interval is automatically converted to its annualized value.

7.3.9.19. Money

A datatype used to represent a monetary value.

Properties

Property	Type	Description
`amount`	Number	The amount of money
`currency`	Currency	The currency of the money (e.g. USD or EUR)
`asOrgCurrency`	Money	Converts the money to the org's default currency, (using the current exchange rate in effect as-of the evaluation date).

Type Conversions and Money Math

Money values can use any math operations, such as addition, subtraction, rounding and division.

- If two Money values of the same currency are used together in a formula, they will be added normally. (Example: EUR100 + EUR200 = EUR300)
- If two Money values of different currencies are used together in a formula, they will be converted to the org's default currency, using the exchange rate currently in effect as-of that date.
- If a Money value is used together with a non-Money numeric value, such as **Number** or **Percent**, then the non-Money value will be converted into Money of the the same currency as the Money. (Example: USD1000 + 1000 = USD2000)

Representing Money

To represent a Money in an expression, use the **money()** function. You can also use this function to convert between money currencies.

- For example: `money(1000, 'USD')` will resolve to USD $1000

7.3.9.20. Name

A *Carrot* datatype used by fields that store employee names.

> The `Name` datatype is not supported by Custom Fields. The `Name` datatype is currently limited to the default field `name`.

Properties

The `Name` datatype supports the following properties:

Property	Definition
name.**last**	Returns last name, ex. "Morrison."
name.**first**	Returns first name, ex. "Jim."
name.**pref**	Returns preferred first name, ex. "Jimmy."
name.**prefLast**	Returns preferred last name, ex "Morrison."
name.**middle**	Returns middle name, ex. "Douglas."
name.**full**	Returns full name.
name.**preferred**	Returns preferred full name.
name.**preferredFirst**	Returns preferred first name if it exists, otherwise returns first name.
name.**lastPreferred**	Returns preferred full name, reversed, ex. "Morrison, Jimmy."
name.**firstLast**	Returns full name.
name.**lastFirst**	Returns full name, reversed, ex. "Morrison, Jim."

Sample usage

`name.last` returns the last name of a record.

7.3.9.21. Number

A *Carrot* datatype used by fields that store number values.

> The `Number` datatype is supported by Custom Fields, however it cannot directly be used to define custom fields. Custom fields that store number values must be defined as one of two `Number` subtypes: `Decimal` or `Integer`.

Properties

The `Number` datatype does not support any user retrievable properties.

Sample usage

`numberOfVaccines = 2` returns all records where custom field `numberOfVaccines` has the value `2`.

7.3.9.22. Null

A *Carrot* datatype used by fields that have a value of `null`.

> The `Null` datatype is not supported in Custom Fields.

Properties

The `Null` datatype does not support any user retrievable properties.

7.3.9.23. Percent

A *Carrot* datatype used by fields that store a percent value.

> The `Percent` datatype is supported by custom fields.

Properties

The `Percent` datatype does not support any user retrievable properties.

Sample usage

`departmentTurnover > .07` returns all records where the turnover rate of the department is greater than 7%.

7.3.9.24. Person

A *Carrot* datatype used by fields that store a person value.

> The `Person` datatype is supported by Custom Fields.

Properties

The `Person` datatype does not support any user retrievable properties.

Sample usage

`assignedSuccessManager:"Jim Morrison"` returns all records where the custom field `assignedSuccessManager` has a value of Jim Morrison.

7.3.9.25. PersonList

A *Carrot* datatype used by fields that store multiple person values.

> The `PersonList` datatype is supported by Custom Fields. All newly created custom fields in ChartHop can be of type `PersonList`.

Properties

The `PersonList` datatype supports the following properties:

Property	Definition
somePersonList.**amount**	Returns the number of Persons in the list.

Sample usage

`liason:"Bob Smith"` returns all records where the value for custom field `liason` contains a record that matches Bob Smith.

7.3.9.26. Relative Dates

Many functions in Carrot (CQL) that accept dates, such as the **date()** function, will accept **Relative Dates,** a way of expressing date math.

Quick Reference

Operation	Example	Description
`+3d`	`date("+3d")`	3 days from today
`-1w`	`date("-1w")`	1 week ago
`+6m`	`date("+6m")`	6 months from today
`monthStart`	`date("monthStart")`	First day of current month
`monthStart-1d`	`date("monthStart-1d")`	Last day of previous month
`fiscalYearStart+1q`	`date("fiscalYearStart+1q")`	Start of Q2 of fiscal year

Relative Dates are expressed as a string of operations, like `+3d` (add three days), or `fiscalYearStart+2q-1q` (starting from the beginning of the fiscal year, add two quarters and subtract one day).

Operations are always expressed as `+` or `-` followed by a number, followed by one of the following:

- `d` for days
- `w` for weeks
- `m` for months (will preserve end-of-month if the starting point is also EOM)
- `q` for quarters (will preserve end-of-month if the starting point is also EOM)
- `y` for years

For example, `+3w` means ("plus three weeks")

Relative Dates can start with a *starting point.* If omitted, the starting point will be the current date. For example, `+3m` means ("three months from the current date") but `monthStart+3m` means ("three months from the start of the month of the current date")

Valid starting points are:

- `today` - always returns today's date
- `fiscalYearStart`
- `fiscalQuarterStart`
- `yearStart`
- `quarterStart`
- `monthStart`
- `weekStart`
- `fiscalYearEnd`
- `fiscalQuarterEnd`
- `yearEnd`
- `quarterEnd`
- `monthEnd`
- `weekEnd`

Examples

`date("+1m")` - one month from the current date

`date("-30d", "2025-01-31")` - returns `2025-01-01`

`date("+1m-1d")` - one month, minus one day, from the current date

`date("-1y+1d")` - subtract one year, but add one day, to the current date

`date("today+1m")` - one month from today (equivalent to `date("+1m", today)`)

`date("fiscalYearStart+2q")` - two quarters from the start of the fiscal year of the current date

`date("yearStart+2q")` - two quarters from the start of the calendar year of the current date

7.3.9.27. Shares

A *Carrot* datatype used by fields that store a values related to company shares.

> The `Shares` datatype is not supported by Custom Fields. Supported uses for the `Shares` datatype are currently limited to the default fields `vestedShares`, `unvestedShares`, and `totalShares`.

Properties

The `Shares` datatype does not support any user retrievable properties.

Sample usage

`vestedShares > 1000` returns all records where `vestedShares` is greater than 1000.

7.3.9.28. StockGrant

A *Carrot* datatype used by fields that store equity grant values.

> The `StockGrant` datatype is not supported by Custom Fields. Supported uses for the `StockGrants` datatype are currently limited to the default fields `grants`, `grantShares`, and `grantType`.

Properties

The `StockGrant` datatype supports the following properties:

Property	Definition
StockGrant.**id**	Returns the grant ID.
StockGrant.**stock**	Returns the ticker symbol of this stock.
StockGrant.**date**	Returns the date of the grant.
StockGrant.**vestDate**	Returns the vesting start date of the grant.
StockGrant.**expireDate**	Returns the expiration date of the grant.
StockGrant.**shares**	Returns the number of shares granted.
StockGrant.**price**	Returns the per-share strike price.
StockGrant.**type**	Returns the type of grant.
StockGrant.**vest**	Returns the vesting schedule.
StockGrant.**originalPrice**	Returns the per share grant price at the time of issue.
StockGrant.**currentPrice**	Returns the current per share grant price.
StockGrant.**vestedShares**	Returns the current number of shares vested.
StockGrant.**vestEndDate**	Returns the vesting end date.
StockGrant.**cancelDate**	Returns the cancellation date.
StockGrant.**originalValue**	Returns the original value of the grants.
StockGrant.**currentValue**	Returns the current value of the grants.

7.3.9.29. String

A *Carrot* datatype used by fields that store text values.

> The `String` datatype is supported by Custom Fields, however it cannot directly be used to define custom fields. Custom fields that store text values must be defined as one of two `String` subtypes: `ShortText` or `LongText`.

Properties

The `String` datatype does not support any user retrievable properties.

Sample usage

`favoriteFlavor:orange` returns all records where `favoriteFlavor` has a value of `orange`.

7.3.9.30. Task

An entity type that represents a Task that has been assigned to a user to complete, such as a form submission.

Properties

Property	Type	Description
`user`	**User**	The user who was assigned the task
`person`	**Person**	The person who was assigned the task
`status`	**Enum**	Whether the task was completed or not. Allowed values: • `Pending` • `Done` • `Expired` • `Skipped`
`doneAt`	**Timestamp**	The moment the task was completed, or `null` if never completed
`createAt`	**Timestamp**	The moment the task was created (first assigned)
`dueAt`	**Timestamp**	The moment the task is due, or `null` if the task does not have a due date

7.3.9.31. TimeOff

An entity type that represents time off taken by an employee.

Properties

Property	Type	Description
`approval`	Enum	Approval status, possible values: • Approved • Pending • Cancelled • Rejected • Superseded
`approvalAt`	Timestamp	When the time off was approved
`approvalUser`	User	The user who approved the time off
`createAt`	Timestamp	When the time off was created in the system
`createUser`	User	The user who created the time off
`days`	Number	The number of days that were requested (typically a whole number, but can be `.5` for half-days)
`endDate`	Date	The last day of the time off
`externalId`	String	If the time off was imported from an external system, the unique external identifier from that system
`hours`	Number	The number of hours that were requested
`id`	String	The unique ChartHop identifier of the time off
`note`	String	The note attached to the time off
`policy`	TimeOffPolicy	The policy that was used for this time off
`requestAt`	Timestamp	When the time off was requested
`startDate`	Date	The date that the time off starts

Property	Type	Description
`typeDescription`	String	The type of time off that was requested, for example "PTO", "Sick" or "Jury Duty"
`updateAt`	Timestamp	When the time off was last updated
`updateUser`	User	The user who updated the time off

See Also

- nextTimeOff
- prevTimeOff

7.3.9.32. TimeOffPolicy

Represents a time off policy.

Properties

Property	Type	Description
`allocationType`	Enum	The type of allocation, possible values: • Upfront • Accrual • Unlimited
`createAt`	Timestamp	When the policy was created in the system
`createUser`	User	The user who created the policy
`description`	String	The description of the policy
`id`	String	The unique ChartHop identifier of the time off policy
`name`	String	The unique name of the policy
`status`	Enum	The status of the policy, possible values: • Active • Inactive
`type`	Enum	The type of the time off, possible values: • PTO • TOIL • Vacation • Sick • Medical • Jury • Offsite • Parental • Unpaid • Short Term Disability • Long Term Disability • Bereavement • Military • Religious

Property	Type	Description
		• Voting • Volunteer • Unknown
`updateAt`	Timestamp	When the policy was last updated
`updateUser`	User	lastThe user who updated the time off

See Also

- TimeOff

7.3.9.33. Timestamp

Represents a moment in time, with millisecond precision.

Properties

None.

Type Conversions

If the following types are used in place of a Timestamp:

- **Date**: will be converted into the timestamp of exactly midnight (00:00:00) on the start of that date in the org's timezone.
- **String**: will be parsed, including using @relative dates

7.3.9.34. User

A *Carrot* datatype used by fields that store a user value.

> The `User` datatype is not currently supported in Custom Fields. Supported uses for the `User` datatype are currently limited to users with access to ChartHop.

Properties

The `User` datatype does not support any user retrievable properties.

7.4. Operators

An operator in Carrot is one or more symbols or words that compare the value of a field on its left with one or more values (or functions) on its right. The valuation of the clause will always result as true.

> Carrot operators understand money-math and automatically convert currencies when adding or subtracting two different currencies.

Operator list

Name	Function
+ (add)	An operator used to add two or more expressions.
- (subtract)	An operator used to subtract an expression from another expression.
* (multiply)	An operator used to multiply two or more expressions.
/ (divide)	An operator used to divide one expression by another.
% (modulus)	An operator used to calculate the remainder of a division operation.
= (equals)	Returns true when the value of a given field and a given expression are the same.
!= (not-equals)	Returns all records where the value of a given field and a given expression are **not** the same.
! (not)	Invalidates the truthiness of an evaluated expression.
> (greater-than)	Returns all records where the value of one expression or field is greater than the value of another expression or field.
>= (greater-than-equals)	Returns all records where the value of one expression or field is greater than or equal to the value of another expression or field.
< (less-than)	Returns all records where the value of one expression or field is less than the value of another expression or field.
<= (less-than-equals)	Returns all records where the value of one expression or field is less than or equal to the value of another expression or field.
[ ](array)	Access a given expression as an array, and return a defined position on that array.
: (match)	Returns true where the value of a given field and a given expression partially match.

Name	Function
&& (and)	A logic operator used to evaluate the truthiness of two or more expressions.
|| (or)	A logic operator used to evaluate the truthiness of at least one expression in a sequence of expressions.
if	A logic operator used to return a defined expression based on the truthiness of one or more other expressions.
? (ternary)	Evaluates the truthiness of an expression, and returns the value of one of two expressions based on that outcome.
?: (elvis)	Evaluates the truthiness of the first expression, and returns its value if that value is truthy. If the value of the first expression is not truthy, it returns the value of the second expression.
. (dot)	Used to retrieve a property of a given field.

Operator precedence

When an expression makes use of more than one operator, Carrot relies on a set of rules to determine the order in which each operator is evaluated. Carrot follows a standard order of operations when evaluating an expression based on operator precedence. Operators that have a higher precedence in the table below will be evaluated first.

Precedence	Operator	Associativity
9	[ ](array) . (dot)	left to right
8	! (not)	right to left
7	* (multiply) / (divide) % (modulus)	left to right
6	+ (add) - (subtract)	left to right
5	< (less-than) <= (less-than-equals) > (greater-than) >= (greater-than-equals)	not associative
4	: (match) = (equals) != (not-equals)	left to right
3	&& (and)	left to right
2	|| (or)	left to right
1	? (ternary) ?: (elvis)	right to left

Consider the expression below.

```
variableA * variableB + variableC
```

Without operator precedence, Carrot would not know which operation to complete first. If we refer to the table above, we see that multiplication has a higher precedence than addition. Thus, `variableA * variableB` is evaluated first, then the result of that expression is added to `variableC`.

Of course, addition and multiplication are two well known examples of operator precedence in arithmetic, and it works in the same way in Carrot. Just like arithmetic, if you wanted to change the precedence of the above expression, you would use parenthesis as illustrated below.

```
variableA * (variableB + variableC)
```

In the above expression, we are telling Carrot to explicitly add `variableB` to `variableC` before multiplying the result by `variableA`.

7.4.1. + (add)

An operator used to add two or more expressions.

Syntax

```
valueOne + valueTwo + valueThree + ...
```

Sample usage

`1 + 2 + 3` returns `6`

`"concat" + "enate"` returns `concatenate`

`('2021-01-01') + 1` returns `2021-01-02`

Supported data types

- If two `Numbers`, `Money` values, or `Percents` are added together, the values will be added.
- If either side is a `String`, then both sides will be concatenated as a `String`.
- If either side is a `List`, then both sides are cast to `Lists` and the two `Lists` will be joined together.
- If the left side is a `Date`, and the right side is a `Number`, it will return the date plus that many days.
- If a `Money` value and a `Number` value are added, the `Money` value will increase by the value of the `Number`.
- If a `Percent` value and a `Number` value are added, the `Number` value will increase by the value of the `Percent`.

See also

- Number
- Money
- Percent

- String
- Date
- - (subtract)

7.4.2. - (subtract)

An operator used to subtract an expression from another expression.

Syntax

```
valueOne - valueTwo
```

Sample usage

`(1 - 2) - 3` returns `-4`

`('2021-01-02') - 1` returns `2021-01-01`

Supported data types

- If a `Number`, `Money` value, or `Percent` is subtracted from an expression of the same type, the difference between the two values will be returned.
- If the left side is a `Date`, and the right side is a `Number`, it will return the date minus that many days.
- `Date` is subtracted from another `Date` the number of days between them will be returned.
- If a `Number` value is subtracted from a `Money` value, the `Money` value will decrease by the value of the `Number`.
- If a `Percent` value is subtracted from a `Number` value, the `Number` value will decrease by the value of the `Percent`; the reverse operation will also work, however the returned value will still be of type `Number`.

See also

- Number
- Money
- Percent
- String
- Date

- + (add)

7.4.3. * (multiply)

An operator used to multiply two or more expressions.

Syntax

```
valueOne * valueTwo * valueThree * ...
```

Sample usage

`1 * 2 * 3` returns `6`

Supported data types

- If two `Number`, `Percent`, or `Money` values are multiplied together, the values will be multiplied.
- If a `Number`, `Percent`, or `Money` value is multiplied by a Number or Percent value, the values will be multiplied and retain the `Number`, `Percent`, or `Money` data type.

See also

- **Number**
- **Percent**
- **/ (divide)**

7.4.4. / (divide)

An operator used to divide one expression by another.

Syntax

```
dividend / divisor
```

Sample usage

`1 / 2` returns `0.5`

Supported data types

- If a `Number`, `Percent`, or `Money` value is divided by a value of the same type, the quotient will be returned.
- If a `Number`, `Percent`, or `Money` value is divided by a `Number` or `Percent` value, the quotient will be returned with the same data type as the dividend.

See also

- Number
- * (multiply)

7.4.5. % (modulus)

An operator used to calculate the remainder of a division operation.

Syntax

```
dividend % divisor
```

Sample usage

`10 % 7` returns `3`

Supported data types

- Given two values of type `Number`, the modulus operator will return the remainder of the first value divided by the second value.

See also

- **Number**
- **/ (divide)**

7.4.6. = (equals)

Returns true when the value of a given field and a given expression are the same.

Syntax

```
expression1 = expression2
```

Sample usage

`tenure=3` returns all records where `tenure` is `3`.

`department="engineering"` returns all records where `department` is `engineering`.

`startDate=('2021-01-01')` returns all records where `startDate` is `01/01/2021`.

Supported data types

- Evaluated expressions can be of any type.
- `String` comparisons are case-insensitive.
- If either side of the comparison is a `List` then the comparison will return true if there are any values in common.

See also

- **: (match)**
- **!= (not-equals)**
- **?: (elvis)**

7.4.7. != (not-equals)

Returns all records where the value of a given field and a given expression are **not** the same.

Syntax

```
expression1 != expression2
```

Sample usage

`tenure!=3` returns all records where `tenure` is not `3`.

`department!="engineering"` returns all records where `department` is not `engineering`.

`startDate!=('2021-01-01')` returns all records where `startDate` is not `01/01/2021`.

Supported data types

- Evaluated expressions can be of any type.
- `String` comparisons are case-insensitive.
- If either side of the comparison is a `List` then the comparison will return true if there are any values in common.

See also

- **= (equals)**
- **!= (not-equals)**
- **! (not)**

7.4.8. ! (not)

Invalidates the truthiness of an evaluated expression.

Syntax

```
!expression
```

Sample usage

`!department:engineering` returns all records where `department` does not match `engineering`.

See also

- **> (greater-than)**
- **= (equals)**
- **!= (not-equals)**

7.4.10. >= (greater-than-equals)

Returns all records where the value of one expression or field is greater than or equal to the value of another expression or field.

Syntax

```
expression >= expression
```

Sample usage

`tenure >= 3` return all records where `tenure` is greater than or equal to `3`.

`base >= 100000` returns all records where `base` is greater than or equal to $100,000.

Supported data types

- Number
- Percent
- Money
- Date
- String
- Shares

Note: When a Money value is compared to a Number, the Money value is compared as an amount in the Org's primary currency.

See also

- **> (greater-than)**
- **< (less-than)**
- **<= (less-than-equals)**

7.4.11. < (less-than)

Returns all records where the value of one expression or field is less than the value of another expression or field.

Syntax

`expression < expression`

Sample usage

`tenure < 3` returns all records where `tenure` is less than `3`.

`('2021-01-01') < ('2020-01-01')` evaluates to `false`.

`base < 100000` returns all records where `base` is less than $100,000.

Supported data types

- Number
- Percent
- Money
- Date
- String
- Shares

Note: When a Money value is compared to a Number, the Money value is compared as an amount in the Org's primary currency.

See also

- **> (greater-than)**
- **>= (greater-than-equals)**
- **<= (less-than-equals)**

7.4.12. <= (less-than-equals)

Returns all records where the value of one expression or field is less than or equal to the value of another expression or field.

Syntax

```
expression <= expression
```

Sample usage

`tenure <= 3` return all records where `tenure` is less than or equal to `3`.

`base <= 100000` returns all records where `base` is less than or equal to $100,000.

Supported data types

- Number
- Percent
- Money
- Date
- String
- Shares

Note: When a Money value is compared to a Number, the Money value is compared as an amount in the Org's primary currency.

See also

- **< (less-than)**
- **> (greater-than)**
- **> (greater-than)**

7.4.13. [ ](array)

Access a given expression as an array, and return a defined position on that array.

Syntax

`expression[#]`

- `expression` - a value that can be referenced as a list or object.
- `#` - the ordinal index to target within the array.

Sample usage

`grants[0].shares` accesses `grants` as an array to get the number of `shares` of the **first** `grant` issued.

See also

- **. (dot)**
- **ç**
- **?: (elvis)**

7.4.14. : (match)

Returns true where the value of a given field and a given expression partially match.

Syntax

`expression:match`

- Single-word `Strings` do not require quotations.
- Multi-word `Strings` require quotations: `field:"multi-word string"`.

Sample usage

`department:engineering` returns all records where `department` contains the string `engineering`.

`department:eng` returns all records where `department` contains the string `eng`.

`department:engineering,sales,"customer success"` returns all records where `department` matches any of `engineering`, `sales`, `customer success`.

`department:*` returns all records where `department` has any value.

`department:` returns all records where `department` has no value.

Supported data types

- Anything after the `:` must be a `String`. To compare two fields to each other, or to perform an exact comparison, use the **= (equals)** operator.

See also

- **= (equals)**
- **!= (not-equals)**
- **! (not)**

7.4.15. && (and)

A logic operator used to evaluate the truthiness of two or more expressions.

Syntax

```
booleanExpression && booleanExpression && ...
```

Sample usage

`directs>0 && department:engineering` returns all records with directs greater than zero **and** where department is engineering.

See also

- || (or)
- if
- ! (not)

7.4.16. || (or)

A logic operator used to evaluate the truthiness of at least one expression in a sequence of expressions.

Syntax

```
booleanExpression || booleanExpression || ...
```

Sample usage

`directs>0 || department:engineering` returns all records with `directs` greater than zero **or** where `department` is `engineering`.

See also

- **&& (and)**
- **= (equals)**
- **> (greater-than)**

7.4.17. ? (ternary)

Evaluates the truthiness of an expression, and returns the value of one of two expressions based on that outcome.

Syntax

```
condition ? ifTrue : ifFalse
```

- `condition` - the conditional expression to be evaluated for truthiness.
- `ifTrue` - the expression to be evaluated if `condition` is found to be truthy.
- `ifFalse` - the expression to be evaluated if `condition` is not found to be truthy.

Sample usage

`base * (tenure < 12 ? tenure / 12 : 1)` returns the prorated base salary of someone if they are under 12 months tenure, otherwise returns their base.

See also

- **?: (elvis)**
- **. (dot)**
- **&& (and)**

7.4.18. if

A logic operator used to return a defined expression based on the truthiness of one or more other expressions.

Syntax

```
expressionOne if expressionTwo
```

- `expressionOne` will be evaluated and returned if `expressionTwo` is evaluated to be truthy.

Sample usage

`base if directs > 0` returns `base` if `directs` is greater than `0`.

See also

- || (or)
- && (and)
- . (dot)

7.4.19. ?: (elvis)

Evaluates the truthiness of the first expression, and returns its value if that value is truthy. If the value of the first expression is not truthy, it returns the value of the second expression.

Syntax

```
condition ?: ifFalse
```

- `condition` - the conditional expression to be evaluated for truthiness.
- `ifFalse` - the expression to be evaluated if `condition` is not found to be truthy.

Sample usage

`name.pref ?: name.first` returns someone's preferred first name if available, otherwise returns their formal first name.

See also

- **= (equals)**
- **!= (not-equals)**
- **? (ternary)**

7.4.20. . (dot)

Used to retrieve a property of a given field.

Syntax

`field.property`

- `property` - a supported property of the target field's data type, ex. fields of type **Address** have ten supported properties.

Sample usage

`workAddress.city:"Oak Park"` returns all records where the `city` property of the field `workAddress` is `Oak Park`.

See also

- **[ ](array)**
- **? (ternary)**
- **?: (elvis)**

7.5. Functions

Functions in ChartHop work just like functions in spreadsheets -- they perform calculations on particular data (passed in as *parameters*) and return a *return value*. Some functions also retrieve data from the ChartHop database.

Syntax

A function in Carrot appears as the function name followed by parentheses, which accepts one or several parameter values.

```
function(parameter1, [parameter2])
```

All function names are case-insensitive.

Usage

Functions can be used in any Carrot expression, anywhere Carrot is used (in Smart Calc or Smart Bucket field types, when filtering the Data Sheet, configuring charts within Dashboards, building out custom content for the Homepage or Profiles, etc.)

Function list

Function	Description
abs()	Returns the absolute value of a given value.
asOf()	Returns the result of a Carrot expression on a particular date using either only Primary data, or both Primary and Scenario based data.
boolean()	Converts supported datatypes into a Boolean, equal to either `true` or `false`.
compHistory()	Returns the value of base or variable compensation on a given date.
compBetween()	Calculates the base, variable or cash compensation of a person over a specified period of time including all jobs the person has held.
costBetween()	Calculates the cost of a job over a specified period of time where the cost of a job includes if multiple people have held that job.
date()	Converts input to `Date` including relative `Date` input.
day()	Returns the day of the month of a particular date.
daysOffBetween()	Returns the number of days off taken between two given dates.
diffYears()	Returns the total number of years between two given dates.
diffMonths()	Returns the total number of months between two given dates.
distance()	Returns the distance between built-in addresses in ChartHop in the specified units.
monthEnd()	Returns the last day of a given month.
formatMoney()	Converts a given value of type `Money` into a `String`, while retaining the currency type in the `String` output. Optionally specify the format and locale of the returned value.
formatRound()	Converts a given value into a `String`, rounded to specific decimal place. Accepts `Number`, `Money`, or `Percent` datatypes.

Function	Description
formatNumber()	Converts a given value of type `Number` into a `String`.
formatPercent()	Converts a given value of type `Percent` into a `String`.
formatDate()	Converts a given value of type `Date` into a `String`.
grantedShares()	Returns all of the shares that were granted between two specified dates.
length()	Returns the number of items in a list or set, or the length of a `String`.
max()	Returns the highest of all values passed as parameters.
mean()	Returns the mean value of all the passed parameters, excluding `Nulls`.
money()	Converts a given value to datatype `Money`, including currency conversion.
month()	Returns the ordinal number of the month of a particular date, from 1-12, where 1 is January, 2 is February, and so on.
min()	Returns the lowest of all values passed as parameters.
nextAnniversary()	Given a date, returns the next upcoming anniversary of that date.
number()	Given a value, returns that value as a `Number`.
pluralize()	Given a value of type `String`, returns that value in plural form.
percent()	Given a value, returns that value as a `Percent`.
random()	Returns a random `Number` between `0` and `1`.
round()	Rounds a given value to the defined number of decimal places.

Function	Description
roundUp()	Rounds a given value to the next largest integer.
roundDown()	Rounds a given value to the next smallest number.
string()	Given a value, returns that value as a `String`.
subString()	Given a `String` and specified parameters, returns a part of that `String`.
stockPrice()	Given a `Date`, returns the value of shares on that date.
monthStart()	Returns the first day of a given month.
split()	Divides a `String` into a list of Strings.
vestValue()	Given a start date and end date, returns the share price value of stock that will vest over that period of time.
vestShares()	Given a start date and end date, returns the number of shares that will vest over that period of time.
year()	Returns the Gregorian calendar year of a particular date.

7.5.1. findAnswersByFormAssessment()

Returns individual form answers for a specific question, scoped to both a specific form **and** a specific assessment cycle, optionally filtered by date range.

This is the most targeted of the `findAnswers*` functions — useful when the same question label appears on multiple forms across multiple cycles and you need to pin down exactly which form and cycle you want.

Syntax

```
findAnswersByFormAssessment(question, form, assessment[, from][, until])
```

Parameters

Parameter	Type	Description
`question`	String	Name or ID of the question/field to retrieve answers for
`form`	String	Name or ID of the form
`assessment`	String	Name or ID of the assessment cycle
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormAnswer>

Examples

```
findAnswersByFormAssessment('reviewScore', 'Manager Review', 'Q3 2024 Performance Review').mean{answerValue}
```

Returns the average `reviewScore` from the `Manager Review` form specifically within the Q3 2024 cycle.

`findAnswersByFormAssessment('reviewScore', 'Manager Review', 'Q3 2024 Performance Review').groupBy{target.department}.mean{answerValue}`

Breaks down the average review score by department, scoped to a specific form and assessment cycle.

Note

Use this function when you need both form and assessment scoping simultaneously. If you only need one of those constraints, `findAnswersByForm()` or `findAnswersByAssessment()` will be simpler.

7.5.2. findAnswersByTarget()

Returns individual form answers for a specific question where the **target** (the person the form is about) matches a given person, optionally filtered by date range.

This is the answer-level equivalent of `findResponsesByTarget()` — useful for aggregating scores or values from a single question across all submissions about a specific employee.

Syntax

```
findAnswersByTarget(question, target[, from][, until])
```

Parameters

Parameter	Type	Description
`question`	String	Name or ID of the question/field to retrieve answers for
`target`	Person	The person the form responses are about
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormAnswer>

Examples

```
findAnswersByTarget('managerReviewRating', person, '-365d').mean{answerValue}
```

Returns the average manager review rating given about the current person in the past year.

```
findAnswersByTarget('peerFeedbackImpactRating', person, '-180d').count()
```

Counts the number of peer feedback impact ratings submitted about the current person in the past 6 months.

7.5.3. findAnswersByForm()

Returns individual form answers for a specific question, scoped to a specific form, optionally filtered by date range.

This is useful when the same question name exists on multiple forms and you need to disambiguate — or when you want to analyze answers from one particular form only.

Syntax

```
findAnswersByForm(question, form[, from][, until])
```

Parameters

Parameter	Type	Description
`question`	String	Name or ID of the question/field to retrieve answers for
`form`	String	Name or ID of the form
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormAnswer>

Examples

```
findAnswersByForm('reviewScore', 'Manager Review', '-365d').mean{answerValue}
```

Returns the average `reviewScore` answer submitted via the `Manager Review` form in the past year.

```
findAnswersByForm('oooRating', '1:1 Notes', intervalFrom, intervalUntil).groupBy{submitPerson}.mean{answerValue}
```

In a Dashboard, breaks down average 1:1 self-ratings by person, scoped to the `1:1 Notes` form only.

Note

If the question is only used on one form, `findAnswers()` and `findAnswersByForm()` will produce the same result. Use `findAnswersByForm()` when disambiguation is needed.

7.5.4. findAnswersByAssessment()

Returns individual form answers for a specific question scoped to a specific assessment cycle, optionally filtered by date range.

This is the answer-level equivalent of `findResponsesByAssessment()` — useful when you want to aggregate scores or values from a single question across all participants in a given review cycle.

Syntax

```
findAnswersByAssessment(question, assessment[, from][, until])
```

Parameters

Parameter	Type	Description
`question`	String	Name or ID of the question/field to retrieve answers for
`assessment`	String	Name or ID of the assessment cycle
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormAnswer>

Examples

```
findAnswersByAssessment('managerReviewRating', 'Q3 2024 Performance Review').mean{answerValue}
```

Returns the average manager review rating across all participants in the Q3 2024 cycle.

```
findAnswersByAssessment('managerReviewRating', 'Q3 2024 Performance Review').groupBy{target.department}.mean{answerValue}
```

Breaks down the average manager review rating by department for the specified cycle.

7.5.5. findAnswers()

Returns individual form answers for a specific question across all form submissions, optionally filtered by date range.

While `findResponses()` returns whole form submissions, `findAnswers()` drills down to the level of a single question — letting you aggregate or analyze the values given for a specific field across many responses.

Syntax

```
findAnswers(question[, from][, until])
```

Parameters

Parameter	Type	Description
`question`	String	Name or ID of the question/field to retrieve answers for
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormAnswer>

Examples

```
findAnswers('managerReviewRating', '-365d').mean{answerValue}
```

Returns the average manager review rating submitted across the organization in the past year.

```
findAnswers('oooRating', intervalFrom, intervalUntil).groupBy{submitPerson}.mean{answerValue}
```

In a Dashboard, returns the average 1:1 performance self-rating per person over the dashboard's time interval.

See Also

- `findAnswersByForm()` — scope answers to a specific form
- `findAnswersByAssessment()` — scope answers to a specific assessment cycle
- `findAnswersByTarget()` — scope answers about a specific person

7.5.6. findResponsesBySubmitPerson()

Returns form responses for a specific form where the **submitter** (the person who filled out the form) matches a given person, optionally filtered by date range.

Useful when you want to see all form submissions *made by* a particular employee — for example, all shoutouts a person has sent, or all self-reviews they've submitted.

Syntax

```
findResponsesBySubmitPerson(form, submitPerson[, from][, until])
```

Parameters

Parameter	Type	Description
`form`	String	Name or ID of the form
`submitPerson`	Person	The person who submitted the form responses
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormResponse>

Examples

```
findResponsesBySubmitPerson('Shoutout', person, '-90d').count()
```

Counts the number of shoutouts the current person has sent in the past 90 days.

```
findResponsesBySubmitPerson('1:1 Notes', person, intervalFrom, intervalUntil).count()
```

In a Dashboard, returns the number of 1:1 Notes the current person has submitted over the dashboard's time interval.

7.5.7. findResponsesByTarget()

Returns form responses for a specific form where the **target** (the person the form is about) matches a given person, optionally filtered by date range.

Useful when you want to retrieve all responses written *about* a particular employee — for example, all manager reviews submitted about a specific person.

Syntax

```
findResponsesByTarget(form, target[, from][, until])
```

Parameters

Parameter	Type	Description
`form`	String	Name or ID of the form
`target`	Person	The person the form responses are about
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormResponse>

Examples

```
findResponsesByTarget('360 Feedback', person, '-365d').count()
```

Counts the number of 360 Feedback responses submitted about the current person in the past year.

```
findResponsesByTarget('Manager Review', person, intervalFrom, intervalUntil).mean{answerValue.reviewScore}
```

In a Dashboard, returns the average manager review score for the current person over the dashboard's time interval.

7.5.8. findResponsesByAssessment()

Returns form responses for a specific form submitted within a specific assessment cycle, optionally filtered by date range.

This is useful when you need to scope responses to a particular review or survey cycle, rather than pulling all responses across all time.

Syntax

```
findResponsesByAssessment(form, assessment[, from][, until])
```

Parameters

Parameter	Type	Description
`form`	String	Name or ID of the form
`assessment`	String	Name or ID of the assessment cycle
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormResponse>

Examples

```
findResponsesByAssessment('Manager Review', 'Q3 2024 Performance Review').count()
```

Counts the total number of manager review submissions within the Q3 2024 performance cycle.

```
findResponsesByAssessment('Manager Review', 'Q3 2024 Performance Review').mean{answerValue.reviewScore}
```

Returns the average review score across all submissions in the specified assessment cycle.

```
findResponsesByAssessment('Self Review', 'Q3 2024 Performance Review').groupBy{target}.count()
```

In a Dashboard, shows how many self-reviews were submitted per person in the Q3 2024 cycle.

7.5.9. fiscalYearEnd()

Returns the last date of the fiscal year for a given date, based on your organization's configured fiscal year start month.

If no date is provided, the current context date is used.

Syntax

```
fiscalYearEnd(date)
```

Parameters

Parameter	Type	Description
`date`	Date	Optional. The date to calculate the fiscal year end from. Defaults to today.

Return Type

Date

The last day of the fiscal year that contains the given date.

Examples

For an organization with a **default fiscal year** (starts in January):

```
fiscalYearEnd('2025-05-12')
```

- Returns `2025-12-31` because May 12, 2025 falls within the fiscal year ending December 31, 2025.

For an organization with a **fiscal year starting in February**:

```
fiscalYearEnd('2025-03-15')
```

- Returns `2026-01-31` because March 2025 falls within the fiscal year ending January 31, 2026.

```
fiscalYearEnd('2025-01-15')
```

- Returns `2025-01-31` because January 2025 falls within the fiscal year ending January 31, 2025.

Related Carrot

- **fiscalYearStart()** - Returns the start date of the fiscal year
- **fiscalYear()** - Returns the fiscal year number
- **fiscalQuarterEnd()** - Returns the end date of the fiscal quarter

7.5.10. fiscalYear()

Returns the fiscal year number for a given date, based on your organization's configured fiscal year start month.

If no date is provided, the current context date is used.

When the fiscal year does not start in January, the fiscal year number is the calendar year in which the fiscal year *ends*. For example, with a February fiscal year start, February 2025 through January 2026 is fiscal year 2026.

Syntax

```
fiscalYear(date)
```

Parameters

Parameter	Type	Description
`date`	Date	Optional. The date to get the fiscal year for. Defaults to today.

Return Type

Number

The fiscal year number.

Examples

For an organization with a **default fiscal year** (starts in January):

```
fiscalYear('2025-05-12')
```

- Returns `2025`.

For an organization with a **fiscal year starting in February**:

```
fiscalYear('2025-02-12')
```

- Returns `2026` because February 2025 is the start of fiscal year 2026 (ending January 2026).

```
fiscalYear('2025-01-12')
```

- Returns `2025` because January 2025 is the last month of fiscal year 2025.

Related Carrot

- **fiscalYearStart()** - Returns the start date of the fiscal year
- **fiscalYearEnd()** - Returns the end date of the fiscal year
- **fiscalQuarter()** - Returns the fiscal quarter number (1–4)
- **year()** - Returns the calendar year

7.5.11. fiscalQuarterEnd()

Returns the last date of the fiscal quarter for a given date, based on your organization's configured fiscal year start month.

If no date is provided, the current context date is used.

Syntax

```
fiscalQuarterEnd(date)
```

Parameters

Parameter	Type	Description
`date`	Date	Optional. The date to calculate the fiscal quarter end from. Defaults to today. Accepts hardcoded dates (e.g. `'2025-05-01'`) or Relative Dates (e.g. `'+3m'`, `'-3m'`).

Return Type

Date

The last day of the fiscal quarter that contains the given date.

Examples

For an organization with a **default fiscal year** (starts in January):

```
fiscalQuarterEnd('2025-05-12')
```

- Returns `2025-06-30` because May 12 falls in Q2, which ends on June 30.

For an organization with a **fiscal year starting in February**:

```
fiscalQuarterEnd('2025-02-15')
```

- Returns `2025-04-30` because February falls in fiscal Q1, which ends on April 30.

`fiscalQuarterEnd('2025-01-15')`

- Returns `2025-01-31` because January falls in fiscal Q4, which ends on January 31.

Using Relative Date Offsets

Relative date offsets can be passed to resolve dynamically relative to today, without needing to hardcode a specific date:

`fiscalQuarterEnd('+3m')`

- Returns the end of the fiscal quarter that is 3 months from today (i.e. "next quarter" when called during the first month of the current quarter).

`fiscalQuarterEnd('-3m')`

- Returns the end of the fiscal quarter that is 3 months ago (i.e. "last quarter").

This is especially useful for dynamic date filters in reports and dashboards. For example:

```
closeDate >= fiscalQuarterStart('+3m') and closeDate <= fiscalQuarterEnd('+3m')
```

This expression will always refer to next quarter's date range without needing manual updates.

Related Carrot

- **fiscalQuarterStart()** - Returns the start date of the fiscal quarter
- **fiscalQuarter()** - Returns the fiscal quarter number (1–4)
- **fiscalYearEnd()** - Returns the end date of the fiscal year
- **Relative Dates** - Relative date expressions supported in CQL

7.5.12. fiscalQuarterStart()

Returns the start date of the fiscal quarter for a given date, based on your organization's configured fiscal year start month.

If no date is provided, the current context date is used.

Syntax

```
fiscalQuarterStart(date)
```

Parameters

Parameter	Type	Description
`date`	Date	Optional. The date to calculate the fiscal quarter start from. Defaults to today. Accepts hardcoded dates (e.g. `'2025-05-01'`) or Relative Dates (e.g. `'+3m'`, `'-3m'`).

Return Type

Date

The first day of the fiscal quarter that contains the given date.

Examples

For an organization with a **default fiscal year** (starts in January):

```
fiscalQuarterStart('2025-05-12')
```

- Returns `2025-04-01` because May 12 falls in Q2, which starts on April 1.

For an organization with a **fiscal year starting in February**:

```
fiscalQuarterStart('2025-03-15')
```

- Returns `2025-02-01` because March falls in fiscal Q1, which starts on February 1.

`fiscalQuarterStart('2025-01-15')`

- Returns `2024-11-01` because January falls in fiscal Q4, which started on November 1 of the previous calendar year.

Using Relative Date Offsets

Relative date offsets can be passed to resolve dynamically relative to today, without needing to hardcode a specific date:

`fiscalQuarterStart('+3m')`

- Returns the start of the fiscal quarter that is 3 months from today (i.e. "next quarter" when called during the first month of the current quarter).

`fiscalQuarterStart('-3m')`

- Returns the start of the fiscal quarter that is 3 months ago (i.e. "last quarter").

This is especially useful for dynamic date filters in reports and dashboards. For example:

```
closeDate >= fiscalQuarterStart('+3m') and closeDate <= fiscalQuarterEnd('+3m')
```

This expression will always refer to next quarter's date range without needing manual updates.

Related Carrot

- **fiscalQuarterEnd()** - Returns the end date of the fiscal quarter
- **fiscalQuarter()** - Returns the fiscal quarter number (1–4)
- **fiscalYearStart()** - Returns the start date of the fiscal year
- **Relative Dates** - Relative date expressions supported in CQL

7.5.13. fiscalQuarter()

Returns the fiscal quarter number (1–4) for a given date, based on your organization's configured fiscal year start month.

If no date is provided, the current context date is used.

Syntax

```
fiscalQuarter(date)
```

Parameters

Parameter	Type	Description
`date`	Date	Optional. The date to get the fiscal quarter for. Defaults to today.

Return Type

Number

A number from 1 to 4 representing the fiscal quarter.

Examples

For an organization with a **default fiscal year** (starts in January):

```
fiscalQuarter('2025-05-12')
```

- Returns `2` because May falls in Q2 (April–June).

For an organization with a **fiscal year starting in February**:

```
fiscalQuarter('2025-02-15')
```

- Returns `1` because February is the first month of the fiscal year, placing it in Q1.

```
fiscalQuarter('2025-01-15')
```

- Returns `4` because January falls in the last quarter of a Feb–Jan fiscal year.

Related Carrot

- **fiscalQuarterStart()** - Returns the start date of the fiscal quarter
- **fiscalQuarterEnd()** - Returns the end date of the fiscal quarter
- **fiscalYear()** - Returns the fiscal year number
- **fiscalYearStart()** - Returns the start date of the fiscal year

7.5.14. diffQuarters()

Returns the number of whole calendar quarters between two dates. The result is positive when `date2` is after `date1`, and negative when `date2` is before `date1`.

Syntax

```
diffQuarters(date1, date2)
```

Parameters

Parameter	Type	Description
`date1`	Date	The date from which counting begins
`date2`	Date	The date at which counting ends

Return Type

Number

The number of whole quarters between the two dates. Partial quarters are not counted.

Examples

```
diffQuarters('2025-01-01', '2025-12-31')
```

- Returns `3` because there are 3 full quarters between January 1 and December 31.

```
diffQuarters('2025-01-01', '2026-01-01')
```

- Returns `4` because there are exactly 4 quarters in a full year.

Related Carrot

- diffDays() - Returns the number of days between two dates
- diffWeeks() - Returns the number of whole weeks between two dates
- diffMonths() - Returns the number of whole months between two dates
- diffYears() - Returns the number of whole years between two dates

7.5.15. diffWeeks()

Returns the number of whole weeks between two dates. The result is positive when `date2` is after `date1`, and negative when `date2` is before `date1`.

Syntax

```
diffWeeks(date1, date2)
```

Parameters

Parameter	Type	Description
`date1`	Date	The date from which counting begins
`date2`	Date	The date at which counting ends

Return Type

Number

The number of whole weeks between the two dates. Partial weeks are not counted.

Examples

```
diffWeeks('2025-01-01', '2025-12-31')
```

- Returns `52`.

```
diffWeeks('2025-01-01', '2025-01-08')
```

- Returns `1` because there is exactly one full week between the two dates.

Related Carrot

- diffDays() - Returns the number of days between two dates
- diffMonths() - Returns the number of whole months between two dates
- diffYears() - Returns the number of whole years between two dates

7.5.16. diffDays()

Returns the number of days between two dates. The result is positive when `date2` is after `date1`, and negative when `date2` is before `date1`.

Syntax

```
diffDays(date1, date2)
```

Parameters

Parameter	Type	Description
`date1`	Date	The date from which counting begins
`date2`	Date	The date at which counting ends

Return Type

Number

The number of days between the two dates.

Examples

```
diffDays('2025-01-01', '2025-12-31')
```

- Returns `364`.

```
diffDays('2025-03-15', '2025-01-01')
```

- Returns `-73` because `date2` is before `date1`.

Related Carrot

- diffWeeks() - Returns the number of whole weeks between two dates
- diffMonths() - Returns the number of whole months between two dates
- diffYears() - Returns the number of whole years between two dates

7.5.17. abs()

Returns the absolute value of a given value.

Syntax

`abs(value)`

- `value` - the value to be evaluated by the function.
  - Input `value` must be of type **Number**.
- **Return type:** **Number**.

Sample usage

`abs(-10)` returns `10`.

Supported data types

Input type	Return type	Logic
Number	**Number**	No type conversion.
Unsupported data types	**Null**	Unsupported data types return **Null**.

7.5.18. asOf()

Returns the result of a Carrot expression on a particular date using either only Primary data, or both Primary and Scenario based data.

Syntax

asOf - Returns the result of a Carrot expression on a particular date using data from both Primary, and the Scenario that the function is used in.

```
asOf( date: Date, expression:{CQL} )
```

- `date` - The selected date.
- `expression` - The Carrot (CQL) expression.
- **Return type:** The data type result of the Carrot (CQL) expression.

Code sample	Result
`asOf('2017-07-01', {performanceRating} )`	Returns the value of `performanceRating` as of January 7th, 2022 using data on Primary and from proposed Scenario changes.

---

asOfPrimary - Returns the result of a Carrot expression on a particular date using data from Primary.

```
asOfPrimary( date: Date, expression:{CQL} )
```

- `date` - The selected date.
- `expression` - The Carrot (CQL) expression.
- **Return type:** The data type result of the Carrot (CQL) expression.

Code sample	Result
`asOfPrimary('2017-07-01', '2022-08-01", 2.5)`	Returns the value of `performanceRating` as of January 7th, 2022, using **only the data on Primary.** Does not include data from proposed Scenario changes.

7.5.19. boolean()

Converts supported datatypes into a Boolean, equal to either `true` or `false`.

Syntax

`boolean(value)`

- `value` - the value to be evaluated by the function.
- **Return type:** Boolean.

Sample usage

`boolean(0)` returns `false`.

`boolean("yes")` returns `true`.

Supported data types

Input type	Return type	Logic
String	Boolean	`String` values that start with `y` or `t` return `true`. `String` values that start with `n` or `f` return `false`.
Number	Boolean	`Number` values equal to `0` return `false`. Non-zero `Number` values return `true`.
Boolean	Boolean	`Boolean` values remain unchanged.
Unsupported type	Null	Unsupported data types return `Null`.

7.5.20. compHistory()

Returns the value of `base` or `variable` compensation on a given date.

Syntax

`compHistory([date]).comp`

- `date` - (optional) the date to be evaluated. The default value is the current date.
- `comp` - the type of compensation to be returned.
  - Accepted values are `base` and `variable`
- **Return type:** Comp

Sample usage

`compHistory('2017-07-01').base` returns the value of `base` compensation on the given date.

`compHistory().variable` returns the value of `variable` compensation on the current date.

Supported data types

Input type	Return type	Logic
Date	Money	Function will return the value of the specified compensation type on the input date.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.21. compBetween()

Calculates the base, variable or cash compensation of a person over a specified period of time including all jobs the person has held.

compBetween()

Returns the compBetween calculation excluding data from Primary.

Syntax

baseCompBetween- Calculates the **Base** compensation of a person over a specific time period, including internal transfers and moves.

```
baseCompBetween( startDate: Date, endDate: Date, Multiplier: BigDecimal)
```

- `startDate` - The start date of the checked time period.
- `endDate` - The end date of the checked time period.
- `Multiplier` - Optional multiplier. Defaults to `1.0`.
- **Return type:** Comp

Code sample	Result
`baseCompBetween('2017-07-01', '2022-08-01", 1.0)`	Returns the `base` comp of a person between January 7th, 2017 and January 8th, 2022.

---

variableCompBetween - Calculates the **Variable** compensation of a person over a specific time period, including internal transfers and moves.

```
variableCompBetween( startDate: Date, endDate: Date, Multiplier: BigDecimal)
```

- `startDate` - The start date of the checked time period.
- `endDate` - The end date of the checked time period.
- `Multiplier` - Optional multiplier. Defaults to `1.0`.
- **Return type:** Comp

Code sample	Result
`variableCompBetween('2017-07-01', '2022-08-01", 2.5)`	Returns the `variable` comp of a person between January 7th, 2017 and January 8th, 2022 and multiplies the value by `2.5`.

---

cashCompBetween - Returns the **Base** + **Variable** compensation of a person over a specific time period, including internal transfers and moves.

```
cashCompBetween( startDate: Date, endDate: Date, Multiplier: BigDecimal)
```

- `startDate` - The start date of the checked time period.
- `endDate` - The end date of the checked time period.
- `Multiplier` - Optional multiplier. Defaults to `1.0`.
- **Return type:** Comp

Code sample	Result
`cashCompBetween('2017-07-01', '2022-08-01", 1.0)`	Returns the **base** + **variable** comp of a person between January 7th, 2017 and January 8th, 2022.

7.5.22. costBetween()

Calculates the cost of a job over a specified period of time where the cost of a job includes if multiple people have held that job.

costBetweenPrimary()

Returns the costBetween calculation only using data from Primary.

Syntax

baseCostBetweenPrimary - Calculates the **Base cost** (Base * Org Multiplier) of a job over a specific time period, including future roles with announced start dates, based on data in Primary only.

`baseCostBetweenPrimary( startDate: Date, endDate: Date, Multiplier: BigDecimal)`

- `startDate` - The current, or announced starting date for the current, or future filled role, respectively.
- `endDate` - The end date for the role.
- `Multiplier` - Optional multiplier. Defaults to `1.0`.
- **Return type: Money**

---

variableCostBetweenPrimary - Calculates the **Variable cost** of a job over a specific time period, including future filled roles with announced start dates, based on data in Primary only.

`variableCostBetweenPrimary( startDate: Date, endDate: Date, Multiplier: BigDecimal)`

- `startDate` - The current, or announced starting date for the current, or future filled role, respectively.
- `endDate` - The end date for the role.
- `Multiplier` - Optional multiplier. Defaults to `1.0`.

- **Return type: Money**

---

fullyLoadedCostBetweenPrimary - Calculates the **Base cost** (Base * Org Multiplier) plus the **Variable cost** of a job over a specific time period, including future roles with announced start dates, based on data in Primary only.

`fullyLoadedCostBetweenPrimary( startDate: Date, endDate: Date, Multiplier: BigDecimal)`

- `startDate` - The current, or announced starting date for the current, or future filled role, respectively.
- `endDate` - The end date for the role.
- `Multiplier` - Optional multiplier. Defaults to `1.0`.
- **Return type: Money**

Sample usages

Code sample	Result
`baseCostBetweenPrimary('2017-07-01', '2022-08-01", 1.0)`	Returns the calculated `base` cost of a job between January 7th, 2017 and January 8th, 2022.
`variableCostBetweenPrimary('2017-07-01', '2022-08-01", 2.5)`	Returns the calculated `variable` cost of a job between January 7th, 2017 and January 8th, 2022 and multiplies that value by `2.5`
`fullyLoadedCostBetweenPrimary('2017-07-01', '2022-08-01", 1.0)`	Returns the calculated fully loaded cost of a job: ((`base` * `Org Multiplier`) + `variable`)), between January 7th, 2017 and January 8th, 2022.

7.5.23. turnoverRate()

Calculates a turnover rate (also known as attrition rate), used to measure the rate of employee departures.

Turnover is calculated as the number of departures that occurred over a period of time, divided by the average of headcount at the start of the period and the headcount at the end of the period.

- For example, if measuring turnover in calendar year 2025, if the organization:
  - began the year on with 100 people on Jan 1
  - saw 20 departures through the course of the year
  - ended the year at 150 people on Dec 31
  - Then turnover rate is 20 / ((100 + 150) / 2) = 16%.

Syntax

```
turnoverRate(fromDate, untilDate[, jobFilter][, departFilter][, groupBy])
```

Parameters

Parameter	Types	Description
`fromDate`	Date or String	The starting-point date (inclusive) of the interval being measured for turnover. For example if measuring turnover in the calendar year 2025, this would be `2025-01-01`
`untilDate`	Date or String	The ending date (exclusive) of the interval being measured for turnover. For example, if measuring turnover in the calendar year 2025, this would be `2026-01-01`.
`jobFilter`	@Expression	An expression to filter which jobs will be included in the calculation. For example, if excluding contract roles or interns from the calculation, could use `{!employment:contract,intern}`
`departFilter`	@Expression	An expression to filter what types of departures will be included in the calculation. For example, if only including voluntary departures, could use `{depart:voluntary}`
`groupBy`	@Expression	If used, will group the results by the expression. For example, if calculating turnover rate broken down by gender, you could pass `{gender}`

Returns

Number if the groupBy parameter was not used, or an @AggregatedResult if the groupBy parameter was used.

The result will be the calculated turnover value over the period of time.

Examples

Within a dashboard, overall annual turnover:

`turnoverRate('-1y+1d',

`date()` returns the current date.

`date("-3m")` returns the date three months ago

`date(1744206569)` returns the date of April 9, 2025 (by converting from a unix timestamp)

`date("2025-12-25")` returns the exact date of Dec 25, 2025

`date("+6w", createDate)` returns a date six weeks from the value of `createDate`.

7.5.24. date()

Converts a value to a **Date**, including handling relative dates.

Syntax

`date(value[, startingDate])`

- `value` - the value to convert to a date. This value may be an exact date ("2025-01-01"), or in **Relative Dates** form ("+1w+3d")
  - If passed a **Number**, then the number will be assumed to be a Unix Timestamp (seconds since the epoch)
- `startingDate` (optional) if passed, will use this date as the starting-point date for the relative date

Return Type

Date, or **Null** if unable to parse or convert the value into a date

Examples

`date()` returns the current date.

`date("-3m")` returns the date three months ago

`date(1744206569)` returns the date of April 9, 2025 (by converting from a unix timestamp)

`date("2025-12-25")` returns the exact date of Dec 25, 2025

`date("+6w", createDate)` returns a date six weeks from the value of `createDate`.

7.5.25. day()

Returns the day of the month of a particular date.

Syntax

```
day(date)
```

Parameters

Parameter	Type	Description
`date`	Date	The date to get the day-of-month from

Return Type

Number

The day of the month. For example, May 12th will return `12`

Examples

```
day('2025-05-12')
```

- Returns `12`

7.5.26. dayOfWeek()

Returns the day of the week of a particular date, where 1 = Monday and 7 = Sunday.

Syntax

```
dayOfWeek(date)
```

Parameters

Parameter	Type	Description
`date`	Date	The date to get the day-of-week from

Return Type

Number

The day of the week. For example, passing in a date that is on a Monday will return `1`

Examples

```
dayOfWeek('2025-05-12')
```

- Returns `1` because Monday, May 12, 2025 was a Monday.

Related Carrot

- formatDate() - Can also be used to display the full name of the data such as "Monday, May 12, 2025"

7.5.27. daysOffBetween()

Returns the number of days off taken between two given dates.

Syntax

`daysOffBetween(fromDate, toDate)`

- `fromDate` - the date from which to begin counting number of days off.
- `toDate` - the date at which counting stops. `toDate` is exclusive.
- **Return type:** Number

Sample usage

`daysOffBetween('2020-10-12', '2020-11-12')` returns the number of days off taken during the specified one month period. This will return the number of days excluding `11/12/20`.

Supported data types

Input type	Return type	Logic
Date (x2)	Number	The function will count the number of days off beginning with `fromDate`, and ending with `toDate`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.28. diffYears()

Returns the total number of years between two given dates.

Syntax

`diffYears(date1, date2)`

- `date1` - the date from which counting begins.
- `date2` - the date at which counting ceases.
- **Return type:** Number

Sample usage

`diffYears('2021-10-11', '2020-10-11')` returns `1`.

Supported data types

Input type	Return type	Logic
Date (x2)	Number	The function will count the number of years beginning with `date1`, and ending with `date2`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.29. diffMonths()

Returns the total number of months between two given dates.

Syntax

`diffMonths(date1, date2)`

- `date1` - the date from which counting begins.
- `date2` - the date at which counting ceases.
- **Return type:** Number

Sample usage

`diffMonths('2021-10-11', '2021-11-11')` returns `1`.

Supported data types

Input type	Return type	Logic
Date (x2)	Number	The function will count the number of months beginning with `date1`, and ending with `date2`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.30. distance()

Returns the distance between built-in addresses in ChartHop in the specified units.

Syntax

`distance(point1, point2[, 'unit'])`

- `point1` - the first location from which to measure distance.
- `point2` - the destination to which the function measures distance.
- `unit` - (optional) the units of the returned distance.
  - Accepted values are: `meters` (default), `miles`, `km`.
- **Return type:** Number

Sample usage

`distance(address, workAddress, 'meters')` returns the distance in meters.

`distance(address, workAddress, 'miles')` returns the distance in miles.

Supported data types

Input type	Return type	Logic
Address (x2)	Number	If two Addresses are passed, the distance between the two will be returned in the specified units. Default units are `meters`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.31. monthEnd()

Returns the last day of a given month.

Syntax

`monthEnd([date])`

- `date` - (optional) the date from which to derive the last day of that date's month.
- **Return type:** Date

Sample usage

`monthEnd('2020-05-12')` returns `2020-05-31`.

Supported data types

Input type	Return type	Logic
Date	Date	The input date specifies the desired month. The month is then used to determine the final date in that month.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.32. findFormTasks()

Returns form-completion Tasks related to a particular Form.

This is particularly useful for reporting on completion rates.

Syntax

```
findFormTasks(form[, from][, until])
```

Parameters

Parameter	Type	Description
`form`	String	Name or ID of the form
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <Task>

Examples

```
findFormTasks('1:1 Form', '-30d').countPercent{status:done}
```

Returns the percentage of 1:1 Form Tasks that have been completed in the past 30 days.

```
findFormTasks('Manager Review', '2024-01-01', '2025-01-01').count()
```

Returns the number of Manager Review Form Tasks that were assigned in the 2024 calendar year.

7.5.33. findFormTasksByAssessment()

Returns form-completion Tasks related to a particular Form within a particular Assessment.

This is particularly useful for reporting on completion rates.

Syntax

```
findFormTasksByAssessment(assessment[, form])
```

Parameters

Parameter	Type	Description
`assessment`	String	Name or ID of the Review or Survey
`form`	String	Name or ID of the Form

Return Type

List <Task>

Examples

```
findFormTasksByAssessment('1H Performance Review', 'Manager Review').countPercent{status:done}
```

Returns the percentage of Manager Review submissions that were completed in the "1H Performance Review" assessment.

```
findFormTasksByAssessment('Engagement Survey').count()
```

Returns the number of Engagement Survey submissions that were sent out.

7.5.34. findResponses()

Returns form responses for a particular form submitted over a period of time.

Syntax

```
findResponses(form[, from][, until])
```

Parameters

Parameter	Type	Description
`form`	String	Name or ID of the form
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

List <FormResponse >

Examples

```
findResponses('1:1 Form', '-30d').count()
```

Returns the number of form responses that have been submitted in the past 30 days.

```
findResponses('Manager Review', '2024-01-01', '2025-01-01').mean{answerValue.reviewScore}
```

Returns the average review score of all submissions of the `Manager Review` form submitted in calendar year 2024.

```
findResponses('Shoutout', intervalFrom, intervalUntil).groupBy{submitPerson}.count()
```

In a Dashboard, return the top submitters of the `Shoutout` form.

```
findResponses('Shoutout', intervalFrom, intervalUntil).groupBy{target}.count()
```

In a Dashboard, return the top recipients of the `Shoutout` form.

7.5.35. findTimeOff()

Returns time off over a period of time, either for one individual person or across the org. Any time off that overlaps part of the date range being queried will be returned.

Syntax

```
findTimeOff(from, until[, person])
```

Parameters

Parameter	Type	Description
`from`	Date	Starting point of the date range to traverse (inclusive)
`until`	Date	Ending point of the date range to traverse (exclusive)
`person`	Person	The person's time off to query. If not passed, returns all time off across the whole org.

Return Type

Sequence <TimeOff>

Examples

```
findTimeOff(date, "+1m").count()
```

Returns the number of time off requests (including those pending and not approved) that are occurring in the next 30 days.

```
findTimeOff("2025-10-01", "2025-11-01").filter{status:approved}.count()
```

Returns the number of time off requests that have been approved that occur in the month of October.

```
findTimeOff("2025-10-01", "2025-11-01", person).filter{status:approved}.sum{days}
```

Returns the total number of days off for a particular person for time off overlapping the month of October.

```
findTimeOff("2025-01-01", "2026-01-01").filter{status:approved and policy.name:"UK Sick Policy"}.sum{days}
```

Returns the total number of days off taken for approved time off requests for the "UK Sick Policy" that overlap the calendar year 2025.

7.5.36. formatMoney()

Converts a given value of type `Money` into a `String`, while retaining the currency type in the `String` output. Optionally specify the format and locale of the returned value.

Syntax

`formatMoney(money[, format][, locale])`

- `money` - the Money value to be converted to a String
- `format` - a formatting string that uses Java's `DecimalFormat` to format the number. For example, `#.00` will format the returned value to two decimal places. Learn how to use `DecimalFormat` **here**, and view additional examples of `DecimalFormat` **here**.
- `locale` - an ISO 639-1 language code, optionally followed by an ISO 3166-1 country code, used to apply proper localization settings to the returned value. For example, `en-US` will format the returned value using US English settings, whereas `en-GB` will format using British English and `fr-CA` will format using French Canadian settings. If `locale` is not passed, it will use the org's default locale (typically `en-US`).
- **Return type:** String

Sample usage

`formatMoney(base)` returns the value of `base` as a `String`, including the currency symbol.

Supported data types

Input type	Return type	Logic
Money	String	If a Money value is passed, it's value will returned as a String, including the currency symbol.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.37. formatRound()

Converts a given value into a `String`, rounded to specific decimal place. Accepts `Number`, `Money`, or `Percent` datatypes.

Syntax

`formatRound(number[, places][, locale])`

- `number` - the Number value to be rounded
- `places` - the number of places of the returned value
- `locale` -
- **Return type:** String

Sample usage

`formatRound(10.101010, 2)` returns `"10.10"`.

`formatRound(base, 2)` returns the value of `base`, rounded to two decimal places, as a `String`.

Supported data types

Input type	Return type	Logic
Number	String	The passed Number value is rounded to the specified decimal places, then converted to a String value.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.38. formatNumber()

Converts a given value of type `Number` into a `String`.

Syntax

`formatNumber(number[, format][, locale])`

- `number` - the Number value to be converted to a String.
- `format` -
- `locale` -
- **Return type:** String

Sample usage

`formatNumber(20)` returns `20` as a `String`.

Supported data types

Input type	Return type	Logic
Number	String	If a Number value is passed, it's value will returned as a String.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.39. formatPercent()

Converts a given value of type `Percent` into a `String`.

Syntax

```
formatPercent(percent[, format][, locale])
```

- `percent` - the Percent value to be converted to a String
- `places` - the number of places of the returned value
- `locale` -
- **Return type:** String

Sample usage

`formatPercent(.5)` returns `50%` as a `String`.

Supported data types

Input type	Return type	Logic
Percent	String	If a Percent value is passed, it's value will returned as a String.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.40. formatDate()

Converts a given value of type `Date` into a `String`.

Syntax

`formatDate(date,'format','locale')`

- `date` - the date to be formatted, eg. `startDateOrg`
- `format` - the format of the Date, eg. `'MM-dd-YYY'`
  - Supports any formatting inputs **from date-fns**.
- `locale` - (optional) the language of the date, eg. `'es'`
  - Default: `'en-US'` - American English
  - Supports any **IETF BCP 47 language tag**.

Sample usage

`formatDate(startDateOrg)`
Returns the value of `startDateOrg` as a `String`.

`formatDate(startDateOrg, 'EEEE, dd MMMM YYYY)`
Returns the value of the `startDateOrg` formatted as a `String` for example "Wednesday, 15 June 2022."

`formatDate(startDateOrg, 'mm-dd-yyyy','es')`
Returns the value of `startDateOrg` as a `String` in Spanish for example "Miercoles, 14 junio 2022"

Supported data types

Input type	Return type	Logic
Date	String	If a Date value is passed, it's value will returned as a String.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.41. grantedShares()

Returns all of the shares that were granted between two specified dates.

Syntax

`grantedShares(fromDate, untilDate[, filters])`

- `fromDate` - the date from which counting begins.
- `untilDate` - the date at which counting ceases.
- `filters` - optional modifiers.
- **Return type**: Number

Sample usage

`grantedShares('2000-01-01', '2020-03-02')` returns the number of shares that were granted between `2000-01-01` and `2020-03-02`.

Supported data types

Input type	Return type	Logic
Date (x2)	Number	The function will count the number of granted shares beginning with `fromDate`, and ending with `untilDate`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.42. jobFieldChanges()

Return a sequence of changes for the current job, for the given field

Syntax

Single field: `jobFieldChanges(fieldCode, fromDate, untilDate)`

Multiple fields: `jobFieldChanges(['fieldCode1', 'fieldCode2'], fromDate, untilDate)`

Parameters

Parameter	Type	Description
`field`	String	The slug or ID of a field
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return Type

Sequence <Job Changes>

Parameter	Type	Description
`change.fieldCode`	String	The value of the field that was updated by the change
`change.date`	Date	Returns the data the that the change occured.
`change.type`	String	Will return one of `CREATE` `UPDATE` or `DELETE`

Examples

```
jobFieldChanges(baseComp, '-5y').count()
```

Returns how many times the `baseComp` field has changed in the last 5 years for a specific job.

Would return `3` if the person had 3 changes to their `baseComp` field in the time period.

```
jobFieldChanges(baseComp, '2024-01-01', '2025-01-01')
```

Returns a sequence of changes to the base comp field between 1/1/2024 and 1/1/2025 for a specific job.

```
jobFieldChanges([department,team,location], '2020-01-01', '2025-01-01')
```

Returns a sequence of all changes to the `department, team, or location` fields for a specific job.

```
jobFieldChanges('title').map{it.update.title}
```

Example return: `["Software Engineer", "Senior Software Engineer"]`

Returns an array of all of the titles across the changes.

```
jobFieldChanges('title').map{date}
```

Example Return: `[2020-01-01, 2020-01-02]`

Returns an array of all of the dates of that the changes occured on.

CQLT Example Template

This would retun a table row with the date of the change and the field that was updated with the title.

```
{% for change in jobFieldChanges('title') %}
<tr>
<td>{{change.date}}</td>
<td>{{change.title}}</td>
</tr>
{% endfor %}
```

7.5.43. length()

Returns the number of items in a list or set, or the length of a `String`.

Syntax

`length(value)`

- `value` - the list or String to be evaluated.

Return type: Number

Sample usage

`length("hello there")` returns `11`

`length(favouriteEmployees)` returns `5` if the number of `Person` values in the field is `5`.

Supported data types

Input type	Return type	Logic
String or list of items	Number	Returns the number of items in a list or set, or the length of a `String`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.44. lowercase()

Returns a **String** with all characters lowercased.

Syntax

```
lowercase(string)
```

- `string` - the String value to be lowercased
- **Return type:** **String**

Examples

- `lowercase("Hello world")` returns `hello world`
- `lowercase(title)` returns the current job's title, lowercased

7.5.45. max()

Returns the highest of all `values` passed as parameters.

Syntax

```
max(value, value2, ...,)
```

- `value` - the first value.
- `value2` - the second value.

Return type: Number , Percent , Money.

Sample usage

`max(-2, 3, 4)` returns `4`.

Supported data types

Input type	Return type	Logic
Number	Number	If a set of Number values is passed, the highest Number value will be returned as a Number value.
Percent	Percent	If a set of Percent values is passed, the highest Percent value will be returned as a Percent value.
Money	Money	If a set of Money values is passed, the highest Money value will be returned as a Money value.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.46. mean()

Returns the mean value of all the passed parameters, excluding `Nulls`.

Syntax

```
mean(value, value2, ...,)
```

- `value` - the first value to be averaged.
- `value2` - the second value to be averaged.

Return type: Number , Percent , Money.

Sample usage

`mean(2, 10)` returns `6`.

Supported data types

Input type	Return type	Logic
Number	Number	If a set of Number values is passed, the mean of the values will be returned as a Number value.
Percent	Percent	If a set of Percent values is passed, the mean of the values will be returned as a Percent value.
Money	Money	If a set of Money values is passed, the mean of the values will be returned as a Money value.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.47. money()

Converts a given value to datatype `Money`, including currency conversion.

Syntax

```
money(value[, currency])
```

- `value` - the value to be evaluated by the function.
- `currency` - (optional) the currency type of the returned `Money` value.
- **Return type:** Money

Sample usage

`money(10)` returns `$10` if `USD` is the primary currency.

Supported data types

Input type	Return type	Logic
Number	Money	If a `Number` value is passed, the amount will be returned as a `Money` value with the specified currency type (default: `org.currency`).
Money	Money	If a `Money` value is passed, the amount will be converted to the specified currency value if it is different from the original currency type.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.48. month()

Returns the ordinal number of the month of a particular date, from 1-12, where 1 is January, 2 is February, and so on.

Syntax

`month(date)`

- `date` - the `Date` value to be evaluated by the function.
- **Return type:** Number

Sample usage

`month('2020-05-12')` returns `5`.

Supported data types

Input type	Return type	Logic
Date	Number	If a `Date` value is passed, the ordinal number of the month will be returned as a `Number` value.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.49. min()

Returns the lowest of all values passed as parameters.

Syntax

```
min(value, value2, ...,)
```

- `value` - the first value.
- `value2` - the second value.

Return type: Number , Percent , Money.

Sample usage

`min(-2, 3, 4)` returns `-2` .

Supported data types

Input type	Return type	Logic
Number	Number	If a set of Number values is passed, the lowest Number value will be returned as a Number value.
Percent	Percent	If a set of Percent values is passed, the lowest Percent value will be returned as a Percent value.
Money	Money	If a set of Money values is passed, the lowest Money value will be returned as a Money value.
Unsupported data types	Null	Unsupported data types return `Null` .

7.5.50. nearestLocation()

Returns the nearest geographic Location to a particular person, group, or address.

Syntax

```
nearestLocation(entity[, list])
```

Parameters

Parameter	Type	Description
`entity`	Person, Group, or Address	The starting point to measure distance from
`list`	List	Optionally, a list of groups, addresses, or persons, to compare against. The one that is the nearest geographically will be returned. If this parameter is not provided, all Locations will be compared.

Return Type

Person, Group, or Address

Whichever entity provided in the `list`, or whichever Group Location is closest geographically, will be returned.

Examples

```
nearestLocation(person)
```

Returns the nearest Location Group to the person, inclusive of remote locations and offices.

```
nearestLocation(person, person.managers)
```

Returns which of the person's manager chain lives closest to the person.

```
nearestLocation(person, db.group.find{type:location and
name:atlanta,boston,orlando})
```

Returns which of the locations matching "Atlanta", "Boston" or "Orlando" is closest to the current person.

7.5.51. nearestOffice()

Returns the nearest geographic Location, including only Office locations (no Remote locations), to a particular person, group, or address.

Syntax

```
nearestOffice(entity[, list])
```

Parameters

Parameter	Type	Description
`entity`	Person, Group, or Address	The starting point to measure distance from
`list`	List<Group>	(Optional) A list of Groups to compare against. The one that is the nearest geographically, and is also an Office, will be returned. If this parameter is not provided, all Locations that are Offices will be compared.

Return Type

Person, Group, or Address

Whichever entity provided in the `list`, or whichever Group Location is closest geographically, will be returned.

Examples

```
nearestOffice(person)
```

Returns the nearest Location, that is an office, to the person.

```
nearestLocation(person, db.group.find{type:location and name:atlanta,boston,orlando})
```

Returns which of the office locations matching "Atlanta", "Boston" or "Orlando" is closest to the current person.

7.5.52. nextAnniversary()

Given a date, returns the next upcoming anniversary of that date.

Syntax

`nextAnniversary(anniversaryDate, fromDate)`

- `anniversaryDate` - the `Date` value to be evaluated by the function.
- `fromDate` - (optional) the `Date` from which to find the next instance of anniversaryDate.
- **Return type:** Date

Sample usage

`nextAnniversary(birthDate)` returns the date one year after birthDate.

`nextAnniversary('2018-05-24', '2021-01-01')` returns `2021-05-24`.

Supported data types

Input type	Return type	Logic
Date	Date	If a Date value is passed, the year will be incremented by 1. If the optional `fromDate` parameter is passed, the year will either increment or decrement by the difference in the year values, depending on whether `fromDate` is before or after `anniversaryDate`.
Unsupported data types	Null	Unsupported data types return `Null`.

Aliases

`birthday` returns the equivalent of `nextAnniversary(birthDate)`.

`anniversary` returns the equivalent of `nextAnniversary(startDate)`.

7.5.53. nextWorkDay()

Returns the date of the next work day for the organization.

A work day is defined as the next non-holiday, non-weekend date.

Syntax

`nextWorkDay([date])`

- `date` - the value to be evaluated by the function.
- **Return type:** Date

Sample usage

`abs(-10)` returns `10`.

Supported data types

Input type	Return type	Logic
Date		No type conversion.
Unsupported data types	Null	Unsupported data types return Null.

7.5.54. number()

Given a value, returns that value as a `Number`.

Syntax

`number(value)`

- `value` - the `Number`, `Money`, `Percent`, `Enum`, `Boolean`, or `String` value to be converted by the function.
- **Return type:** Number

Sample usage

`number($100)` returns `100`.

`number(string(base))` returns the original value of `base`.

Supported data types

Input type	Return type	Logic
Number	Number	If a Number value is passed, the same Number value will be returned.
Money	Number	If a Money value is passed, the amount will be returned as a Number.
Percent	Number	If a Percent value is passed, the amount will be returned as a Number of subtype Decimal where `50%` is equivalent to `.5`.
Enum	Number	If a numeric scale Enum value is passed, the numeric value is returned as a Number.
Boolean	Number	If a Boolean value is passed, `true` will return the Number value `1`, and `false` will return the Number value `0`.
String	Number	If a String value is passed, its constituent characters will be evaluated for compatibility with the Number data type. Characters which are compatible will be returned as a Number value. If two or more sets of compatible characters are separated by non-compatible characters (ex. `"121yes121"`), the compatible sets of characters will be returned as comma-separated values (ex. `121,121`)
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.55. fiscalYearStart()

Returns the start date of the fiscal year for a given date, based on your organization's configured fiscal year start month.

If no date is provided, the current context date is used.

Syntax

```
fiscalYearStart(date)
```

Parameters

Parameter	Type	Description
`date`	Date	Optional. The date to calculate the fiscal year start from. Defaults to today.

Return Type

Date

The first day of the fiscal year that contains the given date.

Examples

For an organization with a **default fiscal year** (starts in January):

```
fiscalYearStart('2025-05-12')
```

- Returns `2025-01-01` because May 12, 2025 falls within the fiscal year starting January 1, 2025.

For an organization with a **fiscal year starting in February**:

```
fiscalYearStart('2025-03-15')
```

- Returns `2025-02-01` because March 15, 2025 falls within the fiscal year starting February 1, 2025.

```
fiscalYearStart('2025-01-15')
```

- Returns `2024-02-01` because January 15, 2025 falls within the fiscal year that started February 1, 2024.

Related Functions

- **Relative Dates** - Relative date expressions including fiscal year references

7.5.56. pluralize()

Given a value of type `String`, returns that value in plural form.

Syntax

```
pluralize(number, singular[, plural])
```

- `number` - the specified number of instances of the evaluated string.
- `singular` - the singular form of the evaluated string.
- `plural` (optional) - the plural form of the evaluated string.
- **Return type:** String

Sample usage

`pluralize(10, "banana")` returns `"bananas"`.

`pluralize(1, "address", "addresses")` returns `"address"`.

`pluralize(10, "address", "addresses")` returns `"addresses"'`.

Supported data types

Input type	Return type	Logic
Number, String	String	If a Number value greater than `1`, or less than `1`, and a single String value are passed, the String value will be returned with an `s` appended to it. If a Number value of `1` is passed, the String value will remain in singular form.
Number , String (x2)	String	If a Number value greater than `1`, or less than `1`, and two String value are passed, including the optional parameter, the second String value will be returned. If a Number value of `1` is passed, the String value will remain in singular form.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.57. percent()

Given a value, returns that value as a `Percent`.

Syntax

`percent(value[, places])`

- `value` - the `Number`, `Percent`, or `String` value to be converted to a `Percent`.
- `places` - the number of decimal places of the returned `Percent` value.
- **Return type:** Percent

Sample usage

`percent(50/100)` returns `50%`.

`percent(0.75)` returns `75%`.

`percent(0.5667777, 3)` returns `56.678%`.

Supported data types

Input type	Return type	Logic
Number	Percent	If a Number value is passed, a Percent will be returned only if the Number value is represented using division, ex. `50/100`, or if it is a decimal.
Percent	Percent	If a Percent value is passed, the same Percent value will be returned.
String	Percent	If a String value is passed a Percent will be returned only if the String value can be converted to a Number value, and that Number value is a decimal.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.58. personFieldChanges()

Return a sequence of changes for the current person, for the given field.

Syntax

Single field: `personFieldChanges(fieldCode, fromDate, untilDate)`

Multiple fields: `personFieldChanges(['fieldCode1', 'fieldCode2'], fromDate, untilDate)`

Parameters

Parameter	Type	Description
`field`	String	The slug or ID of a field or an array of multiple fields.
`from`	Timestamp	Starting point of the date range to traverse (inclusive)
`until`	Timestamp	Ending point of the date range to traverse (exclusive)

Return

Sequence <Job Changes>

Parameter	Type	Description
`change.fieldCode`	String	The value of the field that was updated by the change
`change.date`	Date	Returns the data the that the change occured.
`change.type`	String	Will return one of `CREATE` `UPDATE` or `DELETE`

Examples

```
personFieldChanges(address, '-5y').count()
```

Returns how many times the `address` field has changed in the last 5 years for a specific person.

Would return `3` if the person had 3 changes to their `address` field in the time period.

```
personFieldChanges(address, '2024-01-01', '2025-01-01')
```

Returns a sequence of changes to the `address` field between 1/1/2024 and 1/1/2025 for a specific person.

```
personFieldChanges(address).first.update.title
```

Returns the original value of the `address` field that was set for a specific person.

```
personFieldChanges([NDA,PIAA,EmploymentContract], '2020-01-01', '2025-01-01')
```

Returns a sequence of all changes to the `NDA, PIAA, EmploymentContract` fields for a specific person.

```
personFieldChanges(address.state).map{it.update.address.state}
```

Example return: `["TX", "CO"]`

Returns an array of all of the titles across all changes for a specific person.

```
personFieldChanges(address.state).map{date}
```

Example Return: `[2020-01-01, 2023-01-02]`

Returns an array of all of the dates of that the changes occured on for a specific person.

CQLT Example Template

This would return a table with the dates and states that the person lived in.

```
{% for change in jobFieldChanges('address.state') %}
<tr>
<td>{{change.date}}</td>
<td>{{change.address.state}}</td>
</tr>
{% endfor %}
```

7.5.59. random()

Returns a random `Number` between `0` and `1`.

Syntax

`random()`

- **Return type:** Number

Sample usage

`random()` returns a random `Number` value between `0` and `1`. No arguments are passed by this function. Input arguments will not be considered when returning a random `Number` value between `0` and `1`.

Examples

- `random()` → `0.7429851` (returns a decimal between 0 and 1)
- `random()` → `0.2891047` (each call returns a different random value)
- `floor(random() * 10) + 1` → `8` (random integer between 1-10)

7.5.60. replace()

Replaces all substrings within a **String** with a different string.

Syntax

```
replace(string, search, replace)
```

- `string` - the String value to operate on
- `search` - the String value to search for
- `replace` - the String value to replace in place of any instances of `search`
- **Return type:** String

Examples

- `replace("hello hello world", "hello", "hi")` returns `hi hi world`

7.5.61. round()

Rounds a given value to the defined number of decimal places.

Syntax

`round(number[, places])`

- `number` - the `Number` value to be evaluated.
- `places` (optional) - the number of places of the returned `Number` value.
- **Return type:** Number

Sample usage

`round(4.5678, 2)` returns `4.57`.

`round(4.5678)` returns `5`.

Supported data types

Input type	Return type	Logic
Number	Number	If a Number value is passed, that Number value will be rounded to the defined number of decimal places. Defaults to zero decimal places.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.62. roundUp()

Rounds a given value to the next largest integer.

Syntax

`roundUp(number[, places])`

- `number` - the `Number` value to be evaluated.
- `places` (optional) - the number of places of the returned `Number` value.
- **Return type:** Number

Sample usage

`roundUp(4.5678, 2)` returns `4.57`

`roundUp(4.5678)` returns `5`

Supported data types

Input type	Return type	Logic
Number	Number	If a Number value is passed, that Number value will be rounded up to the defined number of decimal places. Defaults to zero decimal places.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.63. roundDown()

Rounds a given `value` to the next smallest `integer`.

Syntax

`roundDown(number[, places])`

- `number` - the `Number` value to be evaluated.
- `places` - (optional) the number of places of the returned `Number` value.
- **Return type:** Number

Sample usage

`roundDown(4.5678, 2)` returns `4.56`

`roundDown(4.5678)` returns `4`

Supported data types

Input type	Return type	Logic
Number	Number	If a Number value is passed, that Number value will be rounded down to the defined number of decimal places. Defaults to zero decimal places.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.64. string()

Given a `value`, returns that value as a `String`.

Syntax

`string(value)`

- `value` - the value to be converted to a String
- **Return type:** String

Sample usage

`string(base)` returns the value of `base` as a `String`.

`"Base = " + string(base)` where `base = 100000` returns the value `Base = 100000` as a `String`.

7.5.65. subString()

Given a `String` and specified parameters, returns a part of that `String`.

Syntax

`subString(string, start[, length])`

- `string` - the `String` value from which to derive the returned `String`
- `start` - the starting index of the returned `String`
- `length` - (optional) the length of the returned `String`
- **Return type:** String

Sample usage

`subString("Piece of cake.", 2)` returns `"ece of cake."`

`subString("Piece of cake.", 2, 3)` returns `"ece"`

Supported data types

Input type	Return type	Logic
String	String	If a String value is passed, that value will be interpreted beginning with the `start` index. If a `length` is provided, the returned String will contain that many characters, beginning with the `index`. If not, the returned String will contain all remaining characters beginning with the `index`.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.66. stockPrice()

Given a `Date`, returns the value of shares on that date.

Syntax

```
stockPrice([date][, symbol])
```

- `date` - (optional) the date of the returned stock price
- `symbol` - (optional) the ticker symbol of the stock
- **Return type:** Number

Sample usage

`stockPrice('2019-01-01')` returns the value of the stock price on 01/01/2019.

Supported data types

Input type	Return type	Logic
Date	Number	If a Date value is passed, the stock price on that date will be returned.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.67. monthStart()

Returns the first day of a given month.

Syntax

`monthStart([date])`

- `date` - (optional) the date from which to derive the first day of that date's month
- **Return type:** Date

Sample usage

`monthStart('2020-05-12')` returns `2020-05-01`.

Supported data types

Input type	Return type	Logic
Date	Date	The input date specifies the desired month. The month is then used to determine the first day in that month.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.68. split()

Divides a `String` into a list of Strings.

Syntax

`split(string, delimiter)`

- `string` - the String value to be divided into an array of sub-Strings
- `delimiter` - the character or set of characters that indicate where to split the input String
- **Return type:** List

Sample usage

`split("I am a string", ' ')` returns a list of component Strings consisting of `I`, `am`, `a`, and `string`

`split("This-is-text", '-')[2]` returns `text`

Supported data types

Input type	Return type	Logic
String	List, optionally String	If a String is passed, that String will be parsed into an array (list) of component Strings. Specifying the array index will return the String value of that index.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.69. uppercase()

Returns a **String** with all characters capitalized.

Syntax

```
uppercase(string)
```

- `string` - the String value to be capitalized
- **Return type:** **String**

Examples

- `uppercase("Hello world")` returns `HELLO WORLD`
- `uppercase(title)` returns the current job's title, uppercased

7.5.70. usageDays()

Returns the number of days that the current person being evaluated has used a particular ChartHop feature.

Typically this will be used for measuring user activity metrics.

Syntax

```
usageDays(feature, days)
```

Parameters

Parameter	Type	Description
`feature`	String	The feature to check, available features are: • `any` - any usage of any feature • `home` - Home Page • `org` - Org Chart • `sheet` - Data Sheet • `map` - Map • `calendar` - Calendar • `scenario` - Scenarios • `report` - Dashboards • `review` - Reviews and Survey management • `comp_review` - Comp Reviews • `profile` - Profile pages • `content` - Resources pages • `ai_chat` - Ask ChartHop AI
`days`	Number	The number of days back to check

Returns

Number - the number of days

Example

```
usageDays('org', 7)
```

Returns the number of days, out of the past 7 days, that the person has used the Org Chart feature of ChartHop.

7.5.71. vestValue()

Given a start date and end date, returns the share price value of stock that will vest over that period of time.

Syntax

`vestValue(fromDate, untilDate)`

- `fromDate` - the first date in the range
- `untilDate` - the second date in the range
- **Return type:** Money

Sample usage

`vestValue('2020-01-01', '2021-01-01')` returns the share price value of stock over the defined date range

Supported data types

Input type	Return type	Logic
Date	Money	If two Dates are passed, the share price value of stock over that date range will be returned.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.72. vestShares()

Given a start date and end date, returns the number of shares that will vest over that period of time.

Syntax

`vestShares(fromDate, untilDate)`

- `fromDate` - the first date in the range
- `untilDate` - the second date in the range
- **Return type:** Money

Sample usage

`vestValue('2020-01-01', '2021-01-01')` returns the number of shares that will vest over the defined date range

Supported data types

Input type	Return type	Logic
Date	Money	If two Dates are passed, the number of shares that will vest over that range will be returned.
Unsupported data types	Null	Unsupported data types return `Null`.

7.5.73. year()

Returns the Gregorian calendar year of a particular date.

Syntax

`year(date)`

- `date` - the date from which to extrapolate the year
- **Return type:** Number

Sample usage

`year('2020-05-12')` returns `2020`.

Supported data types

Input type	Return type	Logic
Date	Number	If a Date is passed, the year corresponding to that date will be returned.
Unsupported data types	Null	Unsupported data types return `Null`.

Methods

Methods are special types of **Functions** that apply to a **List** or Sequence of data. Usually, methods are used to aggregate data – such as counting or summing List values.

Syntax

Methods are called like this, where `subject` is the subject of the method, such as the List or Sequence that is being aggregated:

```
subject.methodName(parameter1, parameter2)
```

If the method is passed an Expression as a parameter, you can use either of the following syntaxes -- they both mean the same thing:

```
subject.methodName({expression})
subject.methodName{expression}
```

The second is often preferred, for clarity and brevity.

Methods can be chained together to form a pipeline of evaluations -- for example:

```
subject.methodName1{expression1}.methodName2{expression2}
```

Example Usages

Methods can be used anywhere in Carrot.

Most commonly, methods will operate on a List – for example, to calculate the total number of shares from the **Grants** field, only counting grants that have a strike price of less than 10 cents, one could write:

```
grants.filter{price < .1}.sum{shares}
```

Method List

Method	Description
`.all()`	Returns true if all of the items match an expression
`.any()`	Returns true if at least one of the items matches an expression
`.count()	Returns the number of items matching an expression
`.filter()	Returns a list of items that match an expression
.find()	When called against a Table, queries for entities in that table matching the expression
`.groupBy()	*Generally only used in Dashboards*. Groups the items by key, returning a SequenceGroupedBy, that can be aggregated.
`.join()	Returns a string that joins the items together.
`.limit()	Returns a list of items, with the number of the items limited to a certain number.
`.map()	Returns a list of items that have been transformed using the mapping expression passed in.
`.max()	Returns the maximum value of the items in the list, excluding nulls.
`.mean()	Returns the arithmetic mean (average) of the items in the list, excluding nulls.
`.min()	Returns the minimum value of the items in the list, excluding null.
`.none()	Returns true if none of the items matches an expression.
`.sort()	Returns a list of items, sorted by an expression.
`.sortDesc()	Returns a list of items, sorted in descending order.
`.sum()`	Returns the sum of the items (optionally transformed with an expression).
.unique()	Returns a list filtered down to its unique items

Aggregators (deprecated)

Aggregators are special expressions used to aggregate values over time, only used in ChartHop Dashboards. However, **aggregators are now deprecated.**

We recommend that you replace their use with the corresponding ChartHop methods above. The Dashboards UI will be migrated to use Methods instead.

Syntax

An aggregator in Carrot appears as a word followed by curly brackets, which contain an expression.

```
aggregator{expression}
```

An aggregator performs a calculation on the parameter expression and returns a **Number** value based on the aggregator's logic.

All aggregators are case-insensitive.

Usage

Aggregators are only available in Dashboards.

Migration

To replace the use of an Aggregator currently used in a Dashboard with a Method call instead, use the following syntax:

```
db.job.find(jobFilter).aggregator{expression}
```

For example, this aggregator call:

```
count{headcount if department:engineering}
```

Becomes:

```
db.job.find{department:engineering}.count{headcount}
```

Aggregator List

Aggregator	Description
count {}	Counts the number of times a given expression evaluates to a truthy value. All non-truthy values, such as `null`, an empty string, `0`, or `false` are discarded.
max{}	Returns the largest value of a given expression. All non-numeric values are discarded.
mean {}	Returns the average of all values of a given expression. All non-numeric values are discarded.
min{}	Returns the smallest value of a given expression. All non-numeric values are discarded.
sum{}	Returns the sum of all values of a given expression. All non-numeric values are discarded.

7.6.1. .count()

Returns the number of items in a **Sequence** or **List**.

Syntax

`.count()`

- Returns the total number of items in the Sequence or List

`.count{expression}`

- Returns the number of items in the Sequence or List where the `expression` evaluates to a truthy value

Examples

- `[1, 2, 3].count()` returns `3`
- `[1, 2, 3].count{it >= 2}` returns `2`
- `db.job.find{dept:engineering}.count()` returns the number of jobs in the Engineering department.
- `db.job.find{dept:engineering}.count{baseComp > 100000}` returns the number of jobs in the Engineering department where base compensation is at least $100k.

7.6.2. .countPercent()

Returns the percentage of items in a **Sequence** or **List** that match a criteria.

The result is always returned as a **Percent**, calculated as (number of items that match the criteria) divided by (total number of items).

Syntax

`.count{expression}`

- Returns the percentage of items in the Sequence or List where the `expression` evaluates to a truthy value

Examples

- `[1, 2, 3, 4].countPercent{it >= 3}` returns `50%`
- `db.job.find().countPercent{dept:engineering}` returns the percentage of all jobs in the organization that are in the Engineering department.
- `db.job.find{dept:engineering gender:*}.countPercent{gender:female}` returns the percentage of Female-identified people, taken as a percentage of people in the Engineering department who have specified their gender.

7.6.3. .groupBy()

Given a **Sequence** or a **List**, buckets each item into groups, which then can run additional methods to aggregate by group.

This method is primarily used in Dashboards, which understand how to visualize aggregated results. It's foundational for common reporting aggregations to answer questions like "Break down our headcount by department".

The `groupBy` method itself returns a `SequenceGroupedBy` object which is not used directly. Instead, you can chain additional aggregation methods, like **.sum()** or **.mean()** onto it to return `AggregatedResults` that can be visualized in Dashboards.

Syntax

`.groupBy{expression}`

- Evalutes `expression` on each item in the Sequence or List, and buckets into groups based on the result of that expression

Examples

- `[1, 2, 3, 4, 5].groupBy{it % 2 ? "Odd Numbers" : "Even Numbers"}.sum()` will return an AggregatedResult of "Odd Numbers" = 9, "Even Numbers" = 4.
- `db.job.find().groupBy{department}.count{gender:female}` returns the number of Female-identified people in each department.
- `db.job.find().groupBy{department:engineering,product ? 'R&D' : department:sales,marketing ? 'S&M' : 'G&A'}.sum{cost}` returns the total cost of all jobs bucketed into three groups of `R&D', 'S&M', and 'G&A'.

7.6.4. .max()

Returns the largest value of a **Sequence** or **List**, optionally evaluating an expression.

Syntax

`.max()`

- Returns the largest numeric value in the Sequence or List.

`.max{expression}`

- Returns the largest value, after evaluating the Carrot expression on each element of the Sequence or List.

Examples

- `[1, 2, 3].max()` returns `3`
- `[1, 2, 3].max{it * 3}` returns `9`
- `db.job.find{dept:engineering}.max{baseComp}` returns the highest base compensation in the Engineering department.

7.6.5. .mean()

Returns the mean average value of a **Sequence** or **List**, optionally evaluating an expression.

Syntax

`.mean()`

- Returns the mean average numeric value in the Sequence or List.

`.mean{expression}`

- Returns the mean average, after evaluating the Carrot expression on each element of the Sequence or List.

Examples

- `[1, 2, 3, 4].mean()` returns `2.5`
- `[1, 2, 3, 4].mean{it * 3}` returns `7.5`
- `db.job.find{dept:engineering}.mean{baseComp}` returns the mean average base compensation in the Engineering department.

7.6.6. .min()

Returns the smallest value of a **Sequence** or **List**, optionally evaluating an expression.

Syntax

`.min()`

- Returns the smallest numeric value in the Sequence or List.

`.min{expression}`

- Returns the smallest value, after evaluating the Carrot expression on each element of the Sequence or List.

Examples

- `[1, 2, 3].min()` returns `1`
- `[1, 2, 3].min{it * 3}` returns `3`
- `db.job.find{dept:engineering}.min{baseComp}` returns the smallest base compensation in the Engineering department.

7.6.7. .filter()

Description

This method, called on a List or Sequence, filters the results to only those results that match the expression.

- Operates on: **List** or **Sequence**
- Returns: **List** or **Sequence**

Syntax

```
.filter{expression}
```

- Returns only those objects that match the expression.

Examples

```
grants.filter{price > 1.50}
```

- Of the **Grants** issued to the current person, only return those stock grants where the strike price is over $1.50.

7.6.8. .find()

Description

This method, called on a @Table, returns a **Sequence** of results matching the filter.

- Operates on: **Sequence**
- Returns: **Sequence**

Syntax

`db.table.find()`

- Returns a Sequence of all of the objects in the Table.

`db.table.find{expression}`

- Returns a Sequence of all of the objects in the Table that match `expression`

Examples

`db.job.find{startDate >= '2025-01-01'}`

- Returns a Sequence of all **Job**s with a start-date from Jan 1 2025 and on.

`db.opportunity.find{type:new stage:"closed won"}`

- Returns a Sequence of all Opportunity objects (if you have an `opportunity` Table), which are of Type "new" and Stage "Closed Won"

Find and Aggregations in Dashboards

Often, `find()` is combined with other methods to calculate aggregations in Dashboards. For example:

- `db.job.find{startDate >= '2025-01-01}.mean{baseComp}`
  - Calculates the mean average base compensation for all jobs that started from 2025-01-01 on.
- `db.job.find{jobFilter}.groupBy{department}.sum{cost}`

- Calculates the total cost of jobs matching the `jobFilter` filter, grouped by each department.

7.6.9. .limit()

Returns a specified number of results from a List or Sequence .

Syntax

```
.limit(number)
```

Returns

List or Sequence - limited to the number of results.

- `number` - the number of results to return.

Return type: List

Examples

`volunteers.limit(4)` returns the first `4` people from the `volunteers` list.

`db.job.find{dept:engineering}.limit(3)` returns the first three jobs found in the Engineering department.

`findHistoryValues( { checkinScore } ).limit(3).mean()` returns the average of the first 3 values of the `checkinScore` field.

7.6.10. .sum()

Returns the sum of all values of a **Sequence** or **List**.

- Operates on: **Sequence** or **List**
- Returns: **Number**, **Money**, **Percent**

Syntax

`.sum()`

- Returns the sum of the numeric elements of the List or Sequence

`.sum{expression}`

- Returns the sum of `expression`, evaluated against each of the elements of the List or Sequence.

Examples

`db.job.find{dept:engineering}.sum{baseComp}` returns the total base compensation of everyone in the Engineering department.

`[1, 2, 3].sum()` returns `6`

`[1, 2, 3].sum{it * 2}` returns `12`

7.6.11. .sumPercent()

Sums each grouped item in a **Sequence** or **List**, and returns each group's sum, as as a percentage of the overall total sum of all items.

Typically this is only used together with a **.groupBy()** expression, and returns an AggregatedResult that contains each group and its percentage of the total.

(If used without a groupBy, it will always return 100%)

Syntax

`.sumPercent{expression}`

- Evalutes `expression` on each item in the Sequence or List, then returns its percentage of the overall total

Examples

- `[1, 2, 3, 4, 5].groupBy{it % 2 ? "Odd Numbers" : "Even Numbers"}.sumPercent{it}` will return an AggregatedResult of "Odd Numbers" = 60%, "Even Numbers" = 40% (because (1 + 3 + 5) / 15 = 60%, and (2 + 4) / 15 = 40%)
- `db.job.find().groupBy{department}.sumPercent{baseComp.annualized}` returns all departments in the organization, grouped by by what percentage of total annualized base comp base is paid to that department.

7.6.12. .nps()

Calculates a **Net Promoter Score** from a **Sequence** or **List**.

Net Promoter Score is calculated by taking the number of Promoters (values of 9 or 10), subtracting the number of Detractors (values of <= 6), and dividing by the total number. The result is multiplied by 100 and therefore will be between -100 (worst) and 100 (best).

This is especially useful in calculating eNPS (Employee Net Promoter Score).

Syntax

`.nps()`

- Returns the NPS score of items in the Sequence or List.

`.nps{expression}`

- Returns the NPS score of items in the Sequence or List evaluating `expression` for each item.

Examples

- `[4, 8, 9, 10].nps()` returns `25`
- `findAnswers('eNPS Question', '-30d').nps{it.value}` returns the eNPS score from all of the responses to the `eNPS Question` question in the past 30 days.
- `findAnswersByAssessment('eNPS Question', '2H Engagement Survey').groupBy{submitPerson.department}.nps{it.value}` returns the eNPS score from all the answers to the `eNPS Question` in the `2H Engagement Survey`, grouped by department.

7.6.13. .unique()

This method returns unique elements from a list or sequence.

- Operates on: **List**
- Returns: **List**

Syntax

`list.unique()`

- Returns a **List** of the elements in the list, filtered down to only its unique elements.

`list.unique{expression}`

- Returns a **List** of the elements in the list with the given expression applied to each element, and then filtered down to be unique. Functionally equivalent to: `list.map{expression}.unique()`

Sample usage

- `underJobs.unique{department}` - Returns the unique set of departments that the current job manages

7.7. Quick Reference: Common Filters

Carrot features a list of commonly used built-in filters to help you view your data in your ChartHop organization.

Management

A collection of filters for capturing data about managers and their direct reports.

Name	Function
`is:person`	Matches by people only (not jobs).
`is:ic`	Matches by people if they are an "individual contributor" (does not have any direct reports).
`is:manager`	Matches by people who have direct reports.
`is:grandmanager`	Matches by people who have direct reports who are managers.

Job and hire status

A collection of filters for capturing job and hiring status data.

Name	Function
`is:open`	Matches if the job state is "open".
`is:hire`	Matches any job state of "open" or "depart" to denote that the job is currently hiring. The filter used for the open roles view on the **Data Sheet**.
`is:start` or `is:starting`	Matches people who have an `announceDate` that is today or earlier, and a `startDateOrg` that is in the future.
`is:depart` or `is:departing`	Matches if the job state is "depart" for people who departed during the defined period.
`is:former`	Matches all people with a `endDateOrg` during the defined period.
`is:current`	Matches all people with a `startDateOrg` that is in the past and no `endDate`.
`is:recentTransfer`	Calculates the number of jobs that were filled via an internal transfer based on the end of the selected date range and interval.
`is:recentHire`	Calculates the number of jobs that were filled by a hire at the end of the selected date range and interval.

7.8. Examples

Carrot can do a lot! So examples are helpful.

This is a growing guidebook of examples of CQL in action for real usecases that we've encountered.

7.8.1. Conditional data display

You can use if statements to conditionally display data within: **Automated Actions**, **Custom profile tabs**, **welcome emails,** **Home page**, **Forms** or **Resources**.

```
We're so excited for you to start on: {{startDate}}

{% if employment:”Part Time” %}
Your contract will run until: {{contractEndDate}}
{% endif %}

{% if employment:”Full Time” %}
Your benefits will begin on {{startDate}}.
{% endif %}
```

7.8.2. Creating a dashboard of top submitters

Problem: you want a dashboard of, "who have submitted the most Shoutouts over a period of time.

Solution: use the **findFormTasksByAssessment()**

8. ChartHop for Developers

Search the **ChartHop Help Center** by pressing Ctrl+K (PC) or Command-K (Mac).



Developer basics



Events



Syncing data to/from ChartHop

8.1. Developer basics

ChartHop, by design, is an extensible data platform. All of your organization's information can be accessed or updated programmatically via API.

Apps and integrations

In order to programmatically extend ChartHop, you will want to create a **ChartHop App**.

An App, once installed, functions as a special type of user with access permissions that you control.

An App can also do the following:

- Take actions and retrieve data just like a normal user via the REST API.
- Can listen for events that occur on ChartHop, such as organizational changes, via a webhook notification endpoint.
    - Events that match the criteria you select will be sent via HTTPS POST to your endpoint, within a few seconds of occurring on ChartHop.

An App can be just for your organization, or you can build an App that can be installed by any organization in ChartHop after being subject for approval.

Getting started

To get started, email **support@charthop.com** with the subject line: **New App Request**.

Then include the following information:

- The name of the App
- The name of the org the App is for
- A description of the App you want to create
- Which permission levels the App requires (see **Access levels**)
- If the App is for your organization only, or if it is to be distributed to other orgs
- If the app be using the REST API, event notifications via webhook, or both
    - If you are using a webhook endpoint, and if so, the URL for that endpoint

Pending approval, ChartHop will create and install an app in your org's account which will include:

- An API Authorization Token that can be used to access the REST API on behalf of the app
- Your webhook URL

REST API

ChartHop's API is described using the Swagger/OpenAPI specification at: **https://api.charthop.com/swagger**.

We recommend **Swagger Codegen** to generate a client library in the language of your choice.

Please email **support@charthop.com** for questions or assistance working against the API.

8.2. Events

Any alteration to data on ChartHop represents an *event*.

You can retrieve events with the Event API, or set an app web hook to subscribe to an event pattern. Note that events are not exactly the same as *changes* (such as hires or departures), because an event can represent an amendment, or even a cancellation, of a change.

For example, if a new hire is entered, and then the date of that new hire is altered, this is just one new-hire *change*, but it's two *events*: change.create.hire and change.update.hire.

In general an event consists of an *entity* (the thing that is being acted upon), and a *type* the type of action that is happening to the entity. In some cases the event has a *subtype* which further describes the type of entity. All events have a code that consists of either `entity.type` or `entity.type.subtype`

Events List

Event	Meaning
`change.create.create`	New job created
`change.create.update`	Job updated
`change.create.hire`	New hire
`change.create.depart`	Departure
`change.create.move`	Move/transfer
`change.create.delete`	Job removed
`change.create.data`	Data collected
`change.update.create`	Amendment to previous new job
`change.update.update`	Amendment to previous job update
`change.update.hire`	Amendment to hire
`change.update.depart`	Amendment to departure
`change.update.move`	Amendment to move
`change.update.delete`	Amendment to job removal
`change.update.data`	Amendment to collected data
`change.delete.create`	Cancellation of job creation
`change.delete.update`	Cancellation of job update
`change.delete.hire`	Cancellation of new hire
`change.delete.depart`	Cancellation of departure
`change.delete.move`	Cancellation of move
`change.delete.delete`	Cancellation of deletion
`change.delete.data`	Cancellation of collected data
`job.create` `person.create`	New person created
`person.update`	Person updated

Event	Meaning
`group.create`	Group created
`group.update`	Group updated
`group.delete`	Group deleted
`app.create`	App created
`app.update`	App updated
`user.create`	User created
`user.update`	User updated
`user.create.<appname>`	App installed
`user.update.<appname>`	Installed app settings changed
`user.token.<appname>`	Token generated for installed app
`user.delete.<appname>`	App uninstalled
`user.update_password`	User password updated
`user.remove_password`	User password removed
`user.invite`	User invited into org
`comment.create`	Comment posted
`comment.delete`	Comment deleted
`content.create`	Content created
`content.update`	Content updated
`content.delete`	Content deleted
`field.create`	Custom field created
`field.update`	Custom field updated
`field.delete`	Custom field deleted
`form.create`	Custom form created
`form.submit`	Custom form submitted

Event	Meaning
`form.update`	Custom form updated
`form.delete`	Custom form deleted
`media.create`	Media image uploaded
`org.create`	Org created
`org.update`	Org settings updated
`process.create.<processname>`	Process started
`process.complete.<processname>`	Process completed
`process.error.<processname>`	Process errored
`report.create`	Report created
`report.update`	Report updated
`report.delete`	Report deleted
`report_chart.create`	Report chart created
`report_chart.update`	Report chart updated
`report_chart.delete`	Report chart deleted
`scenario.create`	Scenario created
`scenario.update`	Scenario updated
`scenario.delete`	Scenario deleted

Event Notifications

An app can subscribe to a pattern of events and receive them as a webhook.

For example:

You might build an app that takes an action upon a new hire. The app might listen for **change.create.hire** events. Whenever a hire occurs, there will be a POST to the app's event notification URL.

Matching specific events

The app can match on different types of events via wildcard matching.

A few examples:

To listen for any kind of change:

`change.*`

To listen for any event involving a hire (new hire, amendment, or cancellation):

`change.*.hire`

Filtering

For events of type `change.*` and `person.*`, you can add additional filtering based on any CQL Filter.

To add the filter, put the filter in `[brackets]` following the wildcard match.

For example, rather than listening for any new hire, you might only want to listen for new hires who are managers in the Engineering department. You could match on:

`change.create.hire [department:engineering directs > 0]`

The particular set of filters that are matched will be passed in the webhook in the matchFilters property.

Webhook format and payload

You will receive the POST as an HTTP POST containing the following:

```
{
    "id": <event id>,
    "orgId": <your org id>,
    "userId": <user id who caused the event>,
    "userName": <name of user who caused the event>,
    "appId": <id of app subscribing>,
    "appName": <name of app subscribing>,
    "appUserId": <id of installation of app>,
    "notifyUrl": <url of notification webhook>,
    "type": <event type>,
    "subtype": <event subtype>,
    "entityType": <entity type>,
    "entityId": <entity id>,
    "matchFilters": <list of filters matched>
    "at": <timestamp of event>
    "payload": <payload>,
}
```

The payload will vary depending on the type of event. Generally, for `create` events, the payload will contain the initial entity being created, and for `update` events the payload will contain the fields that were modified.

Custom payloads

You can define custom payloads to control which specific data gets passed along. For example, you might want a webhook to receive the work email address of new hires.

Custom payloads may currently only be used for `change.*` events.

Define the payload as a JSON object, where the key represents the key element, and the value is a CQL expression containing the data you want to evaluate.

For example, let's suppose you want to pass along a new hire's work email, department name, whether or not they are a manager, and whether they are highly compensated. Set custom payload to:

```
{
    "email": "contact.workEmail",
    "department": "department.name",
    "isManager": "directs > 0",
    "isHighlyCompensated": "base > 200000"
}
```

Carefully considered custom payloads can allow you to control the information that leaves the system.

8.3. Syncing data to/from ChartHop

One of the most common use-cases of the ChartHop API is to pull and push data, such as the current organizational roster or perhaps you have your own payroll system and want to write your own payroll sync to automatically update the ChartHop roster from the payroll system.

Syncing From ChartHop

Querying the organization

The best API call to make open-ended queries to the organizational roster is the **findJobs** call. This API call lets you retrieve both open jobs as well as people, and lets you retrieve whichever fields you choose (using the `fields` parameter) or apply filters (using the `q` parameter).

For example, if you wanted to retrieve the entire roster's first name, last name, title, work email, and work country:

```
https://api.charthop.com/v2/org/{orgId}/job?fields=name.first,name.last,title,contact.workEmail,workAddress.country
```

You can filter with the `q` parameter, using Carrot filtering. For example, if you only wanted people who have been at the company at least 12 months (`tenure >= 12`), you could query:

```
https://api.charthop.com/v2/org/{orgId}/job?fields=name.first,name.last,contact.workEmail&q=tenure>=12
```

- If you want to filter only for people, not open positions, you can use q=open:filled
- For a list of fields that you can query, see Built In Fields. You can also query for any custom fields.
- For more about Carrot filtering, review Filtering.
- To try out filtering in the application, use the Data Sheet and type the filters in the search bar.

Live-syncing via webhook

Often, it is sufficient to query on a regular interval. However, you may want to automatically update your system as soon as something happens on ChartHop.

If so, your app can use a Webhook to subscribe to event notifications. You will want to set up an endpoint URL to receive the webhook, and subscribe to change.* events.

When you receive a notification that a change has occurred, the change payload should contain a jobId. You can query for that job using the queryJobs endpoint. (You can filter for a single person or job via `q=jobId:jobId`)

Permissions

Like everything else on ChartHop, the data that you fetch via API will be filtered according to the app's specific permissions. If you don't receive data that you're expecting, be sure to check the app's permission.

Syncing to ChartHop

Importing data

The best API call to use to update data in bulk in ChartHop is the **importDataCsv** API call `https://api.charthop.com/v1/org/{orgId}/import/csv/data`

This call lets you post a multipart/form-upload of the CSV file to push a large amount of data into ChartHop.

This call has lots of optional parameters. For most purposes we'd recommend using:

- `upsert` - set this to true if you expect to add new people or jobs that aren't in ChartHop already. Don't use it if you're just updating existing people in the roster.
- `createGroups` - set this to true if you want to create departments and locations on the fly if they are in the source system. If you are not creating departments and locations, no need to use it.
- `notifyUserIds` - set this to a list of user-ids (you can retrieve these ids via the **findUsers** API call) to send an email following the completion of the API call.

- `notifyAppName` - set this to the name of the app that you want to show up in the notify email

Checking on the status of the import

The `importDataCsv` call runs asynchronously. Depending on the size of the import, it can take anywhere from a few seconds to an hour. It returns a `Process` object. You can check on the status of the process by calling the **getProcess** call.

Interacting with the ChartHop Apps UI

If your sync is for your own private use, then run the above API call whenever you please, on your own schedule. It's your world!

But, if you are building a sync that is intended for distribution for other ChartHop users, those users will expect the sync to run when they press the "Sync Now" button from the app configuration page in ChartHop.

When the user presses "Sync Now", this starts an asynchronous "sync process" for your app that you, the app developer, are expected to manage the state of. We'll ping your webhook URL to tell you that the user has hit sync, and you ping us back when you're done syncing.

To implement this, you will want to use the following flow:

- Set up an Event Notification Webhook on your own URL, matching on the `process.create.{appname}` event.
- When your Webhook URL receives this event, the entityId will contain the sync process id.
- Run your sync, implementing calls to `importDataCsv` or whatever else you need to complete the sync.
- When your sync is complete (or errors out), call the **updateProcess** API call to mark the sync process as complete.
    - For bonus points and a nicer user experience, call `updateProcess` periodically during your sync, passing a `progress` value from 0 to 1 and a `message` with the last status message. This will control the state of the progress bar the user will see as your sync runs.

Permissions

Your app will need Primary Editor permissions to sync data into ChartHop.

9. Release Notes

Jun 9th, 2026

 New!

- Calibration sessions now support saved views, allowing HR admins and managers to configure and save specific column layouts and filters for calibration. Views can be shared with managers for calibration sessions. Calibration data can now also be exported directly from the calibration page.

Jun 4th, 2026

 New!

- **Ask ChartHop Access Controls (AI Pro)**
  - AI Pro customers can now configure guardrails for Ask ChartHop directly from AI Settings — including controlling which users have access to the AI assistant based on role or filter criteria.

May 22nd, 2026

 New!

- **Open Jobs — Department column restored on Home page**
  - The Department column in the Open Jobs section on the Home page was missing. This has been fixed.

⚒ Fixed

- **Greenhouse field mapper — custom field mappings now work correctly**
  - An issue where custom ATS field mappings to certain built-in fields (like `company`) were being silently dropped has been fixed. Inbound data from Greenhouse now correctly maps to ChartHop custom fields as configured.

May 21st, 2026

 New!

- **AI-powered Job Code Matching**
  - A new AI-powered matching screen under Data Model → Job Codes lets you automatically suggest job codes for positions that don't yet have one. Run the matcher, review suggestions in a spreadsheet, edit as needed, and apply in bulk — all in one place. Requires AI and Dynamic Fields to be enabled.
- **Scenario Approval — "Relative to" toggle for approver fields**
  - When building scenario approval chains (e.g. Create Job workflows), you can now choose whether a field-based approver (like Hiring Manager) resolves relative to the *job being created* or the *person submitting* the scenario.

May 20th, 2026

 New!

- **Job Code Description Tab**
  - Job codes now have a dedicated Description tab in the side drawer with a rich text editor.
- **Goals Layout Improvements**
  - The goals tree view has been cleaned up for improved readability and breathing room.
- **Signature Decline Notifications**
  - When a signature request is declined, the requester now always receives an email notification — even when the org uses Slack or Teams as the primary notification channel.

May 19th, 2026

 New!

- **Compensation Export**
  - A new **Compensation Export** screen under People Ops Tools lets you view and export a full history of compensation changes, with date-range filtering, text search, infinite scroll, and CSV export.

⚒ Fixed

- **Chart edit preview blank when no scenario selected**

- Editing a chart with no scenario selected in the dashboard was showing "No data available" instead of rendering the chart preview. This is now resolved.

May 18th, 2026

 New!

- **Scenario Approval — Auto-approve when submitter is approver**
  - A new option on approval stages automatically approves any stage where the approver is also the submitter, reducing unnecessary approval steps.

Apr 29th, 2026

 New!

- **Natural Language Filtering is now generally available**
  - You can now type a plain-language description of who you're looking for in any filter field — such as "show me engineering hires from this year" — and ChartHop will automatically translate it to a CQL filter. This feature is now available to all orgs.

Apr 25th, 2026

 New!

- **Set Person Field for Approvals**
  - Approval chains can now be configured to route approvals based on a person-type field (e.g. send to the hiring manager or HRBP stored on the job), giving admins more flexibility in building dynamic approval workflows.

Apr 24th, 2026

 New!

- **More control when clearing org data**
  - When clearing org data, admins are now prompted with a choice: remove all user access, or keep it. Previously, clearing org data would silently remove all invited users. The admin who initiates the clear is always preserved.

⚒ Fixed

- **Scenarios — custom overhead cost fields now display correctly in the changes view**
  - Custom fields that calculate overhead costs were disappearing from the scenario changes table after the header cost updated. Values now persist correctly and update dynamically as you change comp bands.

Apr 23rd, 2026

⚒ Fixed

- **Data Sheet Group By — "Copy all data & headers" now copies actual data**
  - When using the Group By feature on the Data Sheet, the Export → "Copy all data & headers" option was only copying column headers with no row data. This is now fixed.
- **Lattice integration — review cycle sync completion now accurate**
  - Fixed two bugs causing Lattice review cycles to show 0% completion in ChartHop.

Apr 16th, 2026

 New!

- **Org Chart Title Abbreviations Improved**
  - Org chart card titles now abbreviate consistently and intelligently when space is constrained, preventing text from being cut off unexpectedly.

Apr 10th, 2026

 New!

- **Embedded Org Chart — View Profile Button Control**
  - Admins can now control whether the "View Profile" button appears on the embedded org chart, giving more control over the embedded experience for customers using ChartHop org charts on external sites.

Apr 9th, 2026

⚒ Fixed

- **Pie Charts Improved**
  - Pie Charts now start at 12 o'clock and radiate clockwise
  - Pie Chart legends now fit the space better and have improved layout adjustments when browser is resized
  - Legend is scrollable if legend items do not fit in space
  - Improved Legend readability. When color is too light, close to white, the text converts to dark gray instead of slice color
- **Stacked Bar Charts Improved**
  - Stacked Bar Chart legends now fit the space better and have improved layout adjustments when browser is resized
  - Legend is scrollable if legend items do not fit in space

 New!

- **Table Crosstab Improved**
  - The Color Scale default for Table Crosstab now uses white as neutral color instead of yellow/orange for better readability
- **Action Menu Visibility for Charts in Dashboards**
  - The Action Menu on Charts in Dashboards is now visible on rollover for that specific chart instead of being visible on all charts at all times.

Apr 7th, 2026

⚒ Fixed

- **Preboarding — new hire work email now displays correctly in the Users page**
  - When viewing a preboarding user in the Users page, the work email field was not displaying correctly in some cases. This has been resolved.

Apr 4th, 2026

 New!

- **Forms Task Tab & Task Filtering**

    - A new Tasks tab within Reviews and Surveys gives admins a centralized place to manage and track form submission tasks. Tasks can now be filtered by type (e.g. signature requests vs. form submissions), making it easier to manage large review cycles.

Apr 2nd, 2026

 New!

- **New Hire Management — Preboarding & Onboarding now in one place**
    - A new tabbed interface under New Hire Management makes it easier to manage preboarding and onboarding all in one place.

Mar 31st, 2026

 LLM Model Change

- Moved from Anthropic model Sonnet 4.0 to Sonnet 4.6

Mar 30th, 2026

 New!

- **Scenario Audit Log**
    - Scenario changes now include a full audit log, giving admins and approvers visibility into who made what changes and when within a scenario.

Mar 27th, 2026

 New!

- **Conditional Scenario Approval Notifications**
    - Approval notifications for scenarios can now be configured with conditional logic, allowing teams to customize who gets notified based on the content of the scenario.

Mar 26th, 2026

 New!

- **Custom balance descriptions**
  - Admins can now add custom descriptions to time-off balance entries, improving clarity for employees.
- **New time off policy support**
  - "Next year" time off policies can now be set up in ChartHop.
- **Select "AM" or "PM" if requesting a half day or less**
  - Employees can select "AM" or "PM" to help their coworkers and managers better understand when they'll be out of the office.
- **Same-day deactivation for departures**
  - Added support for same-day deactivation in Okta/Google for voluntary departures.

⚒ Fixed

- Fixed an issue where ADP Data Connector was producing unexpected manager changes.

Mar 18th, 2026

 New!

- **Stacked rank chart available**
  - Added a stacked rank question option for forms/surveys, expanding available question formats.
- **Process logging for UAM**
  - Added process logging to User Access Management to improve visibility and debugging.
- **Preboarding is in Alpha!**
  - HRIS customers can have their CSM or Support enable preboarding in labs → alpha features.
- **Actions & magic links for preboarding**
  - Added support for using future job data in preboarding action folders, and added magic link support for tasks sent via actions to preboarding users.
- **Greenhouse V3 Integration**

    - Released the first increment of OAuth-based connection and install flow for the Greenhouse V3 integration.

⚒ Fixed

- Fixed an issue where Turbo Importer failed to send data to two columns sharing the same name.

Mar 10th, 2026

 New!

- **Preboarding — New Hire Access to Person Information**
    - Preboarding users can now be granted access to view person information in ChartHop before their official start date, enabling a smoother onboarding experience.

Feb 25th, 2026

 New!

- **Bubble Chart clicks now connect to Profile Side Bar**
    - When you click on people represented in the Bubble Chart in Data Explorer, it now shows the Profile Side Bar for that Person.
- **Greenhouse integration updates**
    - Admins can now select an attribution email, or continue to let ChartHop default to the next admin with the required permissions.
    - We also added an app user setting to choose whether you want jobs in "draft" status to send to ChartHop or stay in Greenhouse

 Improved Performance

- **Core Views load Faster**
    - Core Views including Home, Org Chart, Data Sheet, Calendar, and others load up to 50% faster

Feb 13th, 2026

 New!

- **Mobile App now Supports Signatures**
  - Complete signatures as part of forms or tasks that have signatures assigned on your mobile device with the ChartHop Mobile App.
- **Create a person from an in progress hire to ADP**
  - This unlocks a huge workflow for our ADP 2-way customers, allowing them to leverage a default template in ADP to create a person from ChartHop
- **Bring ability to sync to sheets/excel to scenario menu**
  - You can now sync to sheets/excel DIRECTLY from a scenario instead of navigating to the datasheet first
- **Job Codes in the Data Sheet**
  - Job codes are now supported in the data sheet, so you can view and manage them alongside other job data in a single place.

Feb 10th, 2026

 New!

- **Inline editing for Comp Bands**
  - Compensation bands can now be edited directly in the UI, removing the need to navigate to a separate settings page to make updates.
- **Backfill Scenarios new in Simple Workflows**
  - A new scenario type allows users to submit a backfill request, even if a termination has already been processed or submitted.
- **Send Generated Documents for Signature**
  - When generating PDFs from Letter Templates in **People Ops Tools**, you can now send documents directly to employees for signature using ChartHop's native signing experience.
- **Okta updates for reactivation and deactivation profiles**
  - We can now support same-day deactivation for voluntary departures in Okta/Google

⚒ Fixed

- Fixed an issue where the calendar was showing duplicate time off requests

Jan 30th, 2026

 New!

- **Accruals and carryover with multiple view options!**
  - We now support multiple accrual schedules- biweekly, monthly, semi-monthly etc., and multiple carryover combinations of rolling and fixed expirations.
- **Time off admin can make adjustments in the ledger**
  - Admins can now make an adjustment right on an employees profile tab in the ledger.
- **Search for jobs using custom fields**
  - You can now search and filter jobs using custom field values, making it easier to find the right positions across large org structures.
- **Custom Group tags in profiles**
  - Custom group tags are now surfaced directly in the employee profile header, giving you quick visibility into group membership at a glance.
- **View and Restore Archived Groups**
  - Admins can now filter to view archived departments and custom groups, and restore them directly from the Groups settings page.

⚒ Fixed

- Lattice integration was pulling over duplicate and sometimes empty columns

Jan 21st, 2026

 New!

- **Time Off Carryover Balance Display**
  - The time off balance tab now correctly shows the remaining carryover balance separately, giving employees and admins clearer visibility into what carryover is still available to use.

Jan 16th, 2026

 New!

- **AI Usage** dashboard now available in **Admin** > **History** > **AI Usage**
  - Admins can now view aggregated AI adoption, usage trends, top use cases, and activity across the organization.
- **Internationalization updates**
  - Major updates to emails, home pages and form translations to support global teams.
- **Simplify cleaning up your data!** We introduced the ability to remove a person with one click instead of needing to remove the job and then the person, you can remove the person and it will remove the job with it.
- **Group By on Data Sheet**
  - Users can now group rows in the Data Sheet by any built-in or custom field, with summary row counts displayed for each group.
- **Data Sheet Summary for Form Responses**
  - Form response summary data, including record counts and breakdowns by group, are now displayed at the bottom of grouped data sheet views.

⚒ Fixed

- Issue where the Approve/Reject button would appear when Approvals were not enabled

Jan 14th, 2026

 New!

- **Dashboard Chart Improvements**
  - Pie charts and bar/column charts now have improved label display, better legend readability, and cleaner overall rendering. Admins can now configure charts to show zero values for cleaner data representation.

Jan 12th, 2026

 New in Labs!

- **Group By and Progressive Loading on Data Sheet** is in Alpha
- **UKG Ready sync updates**

    - Improved our Finch integration to support separation of combined values

⚒ Fixed

- Time Off Requests drawer showing holidays or weekends as "1 day" when they occurred at the start or end of a request range
- Updated an issue with preboarding users who would stay in preboarding once they started

Jan 7th, 2026

⚒ Fixed

- Issue with time off balance display on profile tab for accrual policies
- Forms crashing due to selections options

Jan 6th, 2026

 New!

- **Save Dashboard Filters and Date Ranges**
    - Dashboard filters and date range selections can now be saved and shared with viewers, so recipients always see the dashboard in the intended context without needing to re-apply filters manually.

⚒ Fixed

- Issue fixed when Dashboard is shared with a person that is not an owner or and editor, they can now see / use an applied filter
- Updated the daily run toggle for the Deel integration

9.1. Release Notes Archive 2025

2025.12.28

 New!

- Bulk edit jobs in the data sheet
- Added 429 error screen
- Time Off Accruals & Carryover options added to time off policies
- Added a "Copy all data & headers" button to the New Data Sheet
- Added invite token for Preboarding users
- A new "Action" column within the time off ledger view

⚒ Fixed

- New Hires with Future Announce Dates were not able to be invited
- New Hires with Future Announce Dates were not receiving tasks

2025.12.23

 New!

- **Qualified Electronic Signatures** - ChartHop now supports Qualified Electronic Signatures (QES) for organizations that require a higher standard of signature verification, particularly for European compliance requirements.

2025.12.15

 New!

- New and improved Data Sheet with pro capabilities including
  - Navigate with spreadsheet keyboard commands
  - Quickly add columns including custom calculations (like spreadsheet formulas)
  - Copy out of Data Sheet and paste into spreadsheets
  - Much more!

- Option in Time Off to make Notes optional
- Time off Export updated with all entry types
- Carryover and following year added to Time Off profile tab
- **Troubleshooting time off**
- **Calendar**
- **Data Sheet**

⚒ Fixed

- Date picker issues with min/max values on data sheet
- Multi-select overflow formatting on data sheet
- Added kebab menu to data sheet
- Editing job code on data sheet
- Smart bucket column header summary preview for on data sheet
- Display issue with Action descriptions
- Lever Requisitions App renamed to Lever

2025.11.03

 New!

- **Preboarding** users can now be invited and then request a new access refresh.
- Added 429 error screen
- Time Off Accruals & Carryover options added to time off policies
- Added a "Copy all data & headers" button to the New Data Sheet

⚒ Fixed

- Display sensitivity of files on Files page
- Show Other in de-identified survey if there are not enough responses to group.
- Approver error message within Time Off Policy
- How forms handle the deletion of a field with a questions contained in it
- Permission errors within forms
- Weekend & holidays can not be selected conflicts with partial days

- Fixed copy and paste for managers on the data sheet
- Data shee pulls up job panel for people and jobs

2025.10.20

 New!

- **Signatures** - You can now have users sign any PDF that you upload to ChartHop triggered from an automated action

⚒ Fixed

- Display sensitivity of files on Files page
- Show Other in de-identified survey if there are not enough responses to group.
- Approver error message within Time Off Policy
- How forms handle the deletion of a field with a questions contained in it
- Permission errors within forms
- Weekend & holidays can not be selected conflicts with partial days

2025.10.06

 New!

- **Configuring the Home page** - Logos and colors in the header released for all organization
- **Form responses** - Added one-click "Create as Dashboard" button to form responses in Forms, Surveys & Reviews
- **Form responses** - Added "Copy to Dashboard" button for built-in Charts within in Forms, Surveys & Reviews
- **PDF Document Templates** - Users can now upload existing PDFs directly as templates for signatures
- **Copy All Data + Headers** within Comp Reviews - Added "Copy All Data + Headers" button to workbooks within comp reviews
- **Signature Title Option** - Added option to exclude job titles from signatures

⚒ Fixed

- Fixed incorrect chart graphs in dashboard exports
- Fixed inability to scroll through employee list when changing managers on data sheet
- Fixed display issue with uneditbale fields in Custom tab of people dialog
- Fixed percentage and money formatting for smart calculations in the data sheet
- Fixed overlapping text when submitting large numbers of changes on the data sheet
- Fixed "today" in the data sheet not pulling data and the all time view not saving.
- Fixed time off policy guidelines only being visible to owners and admins
- Fixed missing form data in Review task list

2025.10.01

 New!

- **ATS Integration Enhancement** - Added ability to default all jobs coming from ATS inbound syncs to manager-shared visibility rather than organization-wide, giving better control over job posting visibility.
- **Translation Coverage** - Increased translation of data sheet fields, calendar views, and profile sections for improved international user experience.
- **Time Off Policy Display** - Removed unlimited balance indicators from employee-facing interfaces for unlimited time off policies, allowing organizations to customize messaging through policy display names.

⚒ Fixed

- Fixed grants dropping off unexpectedly from equity profile charts before actual vesting completion dates
- Updated custom field mapping for Deel integrations
- Balance adjustment screens show accurate previous values when using effective dates other than today

2025.09.23

 New!

- Newly redesigned **Inviting users** and **Managing users**.
- Added ability to request **Time off policy settings** in increments as low as one hour.

⚒ Fixed

- Clicking twice would sent duplicate taks in Reviews and Surveys

2025.09.16

 New!

- **Ask ChartHop** - an AI-first experience with Ask ChartHop prominently displayed on the homepage, complete with suggested prompts for quick access to AI assistance.
- **Preview images in File Preview** - Image files now display as previews alongside PDF
- **Task Type Labels** - Added a column for task type on the **Managing tasks** and throughout the platform (e.g., "Submit Form" instead of generic labels)
- **startDateLifetime** - A new `startDateLifetime` field captures the very first hire date for employees who may been rehired
- **.nps()** - Added .nps() method in CQL for simpler employee Net Promoter Score calculations.
- **File Upload Names** - Original filenames are now preserved when uploading files to custom fields instead of being renamed.
- Added ability to edit home email for preboarding users

⚒ Fixed

- Issue where scheduled actions were triggering duplicate notifications

2025.08.26

 New!

- **Show miscellaneous option in Files dropdown** - Show files that are not attached to a field.

2025.08.19

 New!

- **Managing tasks** - Pending tasks for form submissions, signature, time off request and general tasks can now be reassigned both within a survey or review or on the general tasks page.

- **Time off for employees for employees** - Employees can now edit their own future time off requests, automatically triggering re-approval workflow when needed
- **Enhanced Search** - Main search bar now supports searching by first name, preferred name, last name, middle name, and email for improved employee discovery.
- **Onboarding & Offboarding built in categories** - categorize fields and actions with built in categories for onboarding and offboarding
- **Automated Actions** - Apply a **Categories** to **Automated Actions** which will then translate to tasks created by those actions.
- **Automated Actions** - is now available to all customers. Previously it was only available to our ChartHop HRIS customers
- **AI Summaries** are out of Beta and generally available. They still must be turned on in AI settings.

⚒ Fixed

- Issue where Yes/No field values would briefly appear then disappear when set in data tables
- Issue where clicking away from edited cells didn't always save changes for certain field types
- Microsoft SSO login issues resolved with a clearly loading state
- Renamed Field Categories to Categories
- Open on org chart button didn't open to person on people data sheet

 LLM Model Change

- Moved from Anthropic model Sonnet 3.7 to Sonnet 4.0

2025.08.12

 New!

- **Demo Account Integration** - Users can populate accounts with sample data when trialing or using a self-serve account
- **Time Off Policy Display Controls** - Separate internal and employee-facing policy names
- **Time Off Policy Sorting** - Customizable sorting for time off policies on profiles

- **Control time off policy display to employees** - Added display name and guidelines fields for time off policies with employee visibility controls

⚒ Fixed

- Any fields written in markdown in ChartHop will translate to HTML in your Jobvite integration so job postings show as designed.

2025.07.28

 New!

- **Change History Functions** - New CQL functions for retrieving job and person change history: **jobFieldChanges()** and **personFieldChanges()**
- Policy Year Settings UI - Dropdown for setting policy year start dates
- Adjustment Management API - Create, update, delete endpoints for time off adjustments
- **Time Off Export Filters** - Policy, entry type, approval status filters
- **Time Off Policy Bundles** - Bundle policies for cross-account installation
- **Holiday Calendar Bundles** - Bundle calendars for sharing between accounts
- **Admin Time Off Request Editing** - Admins can edit request dates and policiess
- **Files Export Screen** - Export all files functionality for admin users

⚒ Fixed

- Imported images from Bamboo should no longer be blurry.

2025.07.24

 New!

- **Display Full Page Form on Profile Tab** - Forms assigned to a profile tab now render as a full-page experience, giving managers and employees more room to view and complete form content directly from the profile.
- **Delete Profile Option** - Admins can now remove a person's profile directly from the UI without needing to remove the job first. Deleting the person automatically removes the associated job.

2025.07.14

 New!

- Balance page for **Time off policy settings**
- Added search and filter to time off policies page
- **Time off policy settings** rounding for time off policies
- Ability to filter on user events inside of **Automated Actions** For example `user.invite` with a filter of `event.entity.status:preboarding`

⚒ Fixed

- `person.update` were throwing when they shouldn't have been
- Fire both `user.create` and `user.invite` events when a user is both invited and created
- Updated visibility note on unreleased forms.
- An issue where signature options couldn't be disabled in forms.
- An issue with mobile business cards
- Added **Move a person to a new job** option to job panel on data sheet.
- Issue with overflow of the **Data Sheet** right click menu
- Improved loading on Time off exports page
- Issue with edit charts page not loading
- Form names were not displaying for `RESUBMIT` form tasks
- Issue with exporting of data sheet
- Icons shrinking on data sheet header
- Announce data issue for **Rippling (licensed API only)** app installs.

2025.07.11

 New!

- View time off balance details on policy and profile pages
- Employees and admin can edit pending and approved time off requests
- Added Policy column on Time Off table

- Added ability to create bundles and automatically share between sandbox and production accounts
- Support for nested asOf() expressions

⚒ Fixed

- Total issued grants no longer include planned grants

2025.07.09

 New!

- New findTimeOff function now available

⚒ Fixed

- Removal of indirect managers shows as expected on Home page & People Moves
- Fixed average caluclations on Data Sheet
- Small view pie charts now load correctly
- Time-tracked person fields now usable to generate Tasks
- Calendar count discrepancies for Time Off have been fixed
- Empty space in some Dashboard formatting removed

2025.07.02

 New!

- Hover on Data Sheet shows "Other" signifier if more than ten options are listed
- Added Screenshot Mode on Org Chart option to remove light gray background and PTO information when taking screenshots
- Org option for Time Off added to enable showing Time Off more than 30 days out

2025.07.01

 New!

- New Financial Settings to set rounding parameters for field types across application

⚒ Fixed

- Rounding in Letter Templates consistently matches Comp Reviews

2025.06.30

 New!

- Customers can now create Bundles
- Each individual can now see AI chat history
- Scenario comments can be edited & deleted
- Scenario comments can be added post-Merge

⚒ Fixed

- Past approval chains show the correct person from approval, even if they have departed the company or changed roles

2025.06.23

 New!

- Allow for customizable turnover function to calculate using monthly averages
- AI chat UI updates
- Multi-language options and Finch integrations are now in beta

2025.06.13

 New!

- Allow for `intervalFrom` and `intervalUntil` to be read in a content block
- Copy charts to another Dashboard
- Easily see percentage used of each budget in Comp Reviews
- Paused Comp Reviews will show managers a read-only state of the review
- Added button to remove sort order on new Data Sheet
- Allowed view only access to forms, reviews and surveys if you have forms, review or survey data, but do not have access in your plan.
- Announce Date is now supported in CSV imports & syncs for departures & hires

⚒ Fixed

- More easily drag & drop charts to rearrange a Dashboard
- An issue where charts weren't showing the "None" totals even when checked
- Group images not appearing on initial load of new Data Sheet
- An issue where the date picker was being cut off on the new Data Sheet
- Editing of phone and email on the new Data Sheet
- Blocked duplicate columns from being added on the new Data Sheet
- An issue where forms that were "Identified" and about "No one specifically" would allow you to hide the identity of the respondent. The proper way to do this is a **Anonymous and De-Identified Surveys & Forms**

2025.06.10

 New!

- **dayOfWeek()** added as a new carrot function to return the day of the week for a given dates
- The **Managers** field can be selected to be used in de-identified surveys.
- **Data Sheet (New)** allows you to open files without downloading them.

⚒ Fixed

- An issue where the new data sheet would require two clicks to open.
- An issue where the new data sheet where adding columns would distort the layout.
- An issue where the new data sheet where pressing delete wouldn't initiate edit mode

2025.06.09

 New!

- You can now unlock access to all of our apps and integrations that are in alpha with the toggle "Alpha apps and integrations". This gives customers early access to in-development integrations to bring more data into ChartHop!
- A new table in the tasks tab within Reviews and Surveys.
- Added support for rich text editing on the New Data Sheet.

⚒ Fixed

- An issue with the loading of tasks and displaying dates on the home page.
- Incorrect due dates displaying on tasks on the home page.
- A display issue with field category groupings

2025.06.04

 New!

- Users without access to a job's compensation can now submit scenarios for approval, while maintaining data access rules & not revealing compensation

⚒ Fixed

- Ability to delete Groups if a child group had previously been deleted
- Ability to create and delete a Group on the same day

2025.06.03

 New!

- Multiple signatures now supported in documents

⚒ Fixed

- Resolved issue with options being reset when trying to change colors and labels in chart editor
- Weeks per year and Hours per week are editable in the Base field on Data Sheet
- Comp bands are now editable on the New Data Sheet V2
- Groups (Department, custom groups, etc) are editable in Data Sheet V2
- Departed employees who are Collaborators in Comp Reviews now get removed
- Fixed UI issue with date picker in Edit job modal

2025.05.28

 New!

- Added ability to compare 2 scenarios on the Impact Tab to see financials, headcount, and more side by side

⚒ Fixed

- Added validation for Dashboards labels to prevent odd display issues with duplicate labels
- Columns and headers alignment fix for Data Sheet v2 (in Beta)
- Time off requests where an employee reports to an Open Job now get routed to their skip-level manager

2025.05.20

⚒ Fixed

- Made home page task loading more reliable

 New!

- Welcome emails can now be customized with **Carrot reference**
- Added AI Settings page
- Added Module Settings page
- Lattice App Alpha release
- Password reset email updated

 Updated!

- iOS version of ChartHop Mobile App updated
  - Restored AI Chat feature (if enabled)
  - Improved session token timeout so that active sessions will extend time window
    - Previously, every 30 days regardless of activity, the mobile app required a login. Now, active sessions will extend the requirement 30 days. This means active use will prevent app from requiring frequent logins.
  - Android App will be updated shortly

2025.04.29

⚒ Fixed

- **baseComp.lastRaise.percent** field now takes into account any and all base increases whether they're isolated or attached to a job change
- Form surveys now allow a new Task to be sent after a user skips the original Task
- Fixed issue with filtering by Groups on Form Responses
- UI tweak to allow editing NPS charts in Dashboards
- **variableTarget** now editable in new Data Sheet
- Filters on Org changes history export now apply when exporting
- Restriction on uploading single-select values removed Comp Bands importer

 New!

- Time Off policies now support **half days**
- Task name can now be edited when creating **Actions**

2025.04.25

 New!

- **Group Mapping via SFTP/RAAS/Google Sheets** - Admins can now populate group mappings (departments, locations, custom groups) via SFTP, RAAS, or Google Sheet imports, making it easier to keep group structures in sync with external data sources.

2025.01.13

 New!

- Native **Mobile ChartHop App** now available for download
  - Great companion app for ChartHop users
    - **ChartHop Mobile App** for quick contact info on-the-go
  - App Store links:
    - iPhone: **https://apps.apple.com/us/app/charthop-directory/id6717590153**
    - Android: **https://play.google.com/store/apps/details?id=com.charthop.mobile&pcampaignid=web_share**

2025.01.08

⚒ Fixed

- **Greenhouse App Settings** UI has been updated for clarity
  - The language changed from Source of Truth to **Inbound/Outbound**
  - Reduced complexity with options that now simply show or hide depending on if they are valid

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2024.12.19

Added

- Allow viewers to **Download Form Responses** as a **PDF**
  - When enabled, anyone who can view the form responses such as the **Person**, **Manager**, or **Admins** will see a **Download** button and will be able to create a **PDF** of that individual form response.
- Request **Half Days** in **Time Off**
  - When requesting Time Off, a new checkbox option to make the day a Half Day now appears.
- **Emojis** are now an option to use in **Calendar Titles**
  - Now calendars can be customized with a color and an emoji as part of the title.

Fixed

- **Terminate & Backfill** workflow now creates **Backfill** immediately
  - When a user submits a **Scenario** via **Terminate & Backfill**, the requested **Backfill** will default to the **Create Date** of **Today**, and be created immediately no matter the **End Date** of the termed employee.

2024.12.16

Added

- **Scenarios** list table now shows the next **Approver** in the chain for each **Scenario**
  - When looking at the **Planning** list table of **Scenarios**, a new column is there to show who the next **Approver** is in the chain.

2024.12.12

Added

- **Approvals** can now include all **Managers in the Chain**

    - When setting up an approval stage, the Stage Approvers option includes a new selection **This stage represents** which defaults to a single stage. The other new option is the one **Multiple stages, one per manager in the manager chain.** Selecting this will automatically create one stage per manager relative to the requester's hierarchy in the organization.
- **Approvers** can *edit* **Scenarios** during their approval phase
    - When a **Scenario** is submitted for **Approval**, the **Approver(s)** whose turn it is to review and approve/reject the scenario can now edit the scenario. Once they approve/reject the scenario is then locked again and can no longer edit.

2024.12.06

Added

- **Heatmap Color Scales** now available in **Dashboard Tables**
    - When configuring a (Non-Timeseries) Table in Dashboards, you have new configuration options to show a color on the scale. You can also customize the colors as well as the min and max values to highlight.

2024.12.04

New!

- Introducing a new primary view in ChartHop, the **Calendar** .
    - Includes events such as **Birthdays**, **Work Anniversaries**
    - Set up **Holiday Calendars** for different Countries/Regions
    - Specific Modules will bring in new types of events for Calendar including:
        - Comp **Review Cycles** with the **Comp Review Module**
        - **Performance Review Cycles** with the **Performance Module**
        - **Custom Calendars** and **Time Off** with **HRIS**

2024.10.28

Added

- **Forms** can now be **Approved** or **Released** in bulk with:
  - **Approve All Form Responses** will move all responses from Awaiting Approval → Approved/Awaiting Release
  - **Release All Form Responses** will move all responses from Awaiting Release → Released
- In **Admin > Org Changes History** new capabilities including:
  - **Org Changes History** table
    - Select a **Date Range**
    - **Edit** and **Delete** moved to icons on the right side of the row
    - Updated visual design & **Field** picker
  - **Export**:
    - Aligned export format to recently updated **Data Sheet** and cross-platform CSV export formatting
    - Added and clarified the change detail columns that will appear in the export

2024.10.22

Added

- In **Data Sheet**, **Jobs** and **People** tabs now work with **Date Range** filters including day, range presets, and custom ranges

2024.09.13

⚒ Fixed

- **Saved Filters** that are *relative* in nature, now show data relative to the viewer when **Data Sharing: Full** is applied
  - For example,
    - When sharing a Dashboard using Data Sharing: Full ...
    - with a Chart featuring headcount by Ethnicity (by default Ethnicity is normally visible)...
    - And the saved filter is "under:me"...

        - The viewer will see the Ethncity data in the chart as it relates to their employees that report to them.

2024.08.08

Security Update

- For users with access to **Multiple ChartHop Accounts**, each account will require independent authentication when switching accounts
    - This includes users with access to a **Sandbox Test Account** for their organization
    - Once authenticated, **Tokens** will last for multiple sessions as set on that account for fast switching convenience

2024.07.22

Added

- In **Performance Reviews** and **Engagement Surveys**, the **Participation Tracking Graph** has been updated.
    - A single graph displaying the statuses and lists of all participants instead of previous two separate graphs
    - It will display a single percentage that represent the % of people that have reached the “Completed” state.
        - The “Completed” state will vary depending on the form setup.
        - These include **Skipped**, **Done** (If it was just submitted), **Approved** (If that is the final state), or **Released**.
    - New statuses reflect the next step in a Form Workflow:
        - **Awaiting Approval** - The form has been submitted, but not approved.
        - **Awaiting Release** - The next step in the workflow is a release. After a submission or approval.
- New built-in **Smart Bucket**: **Manager** or **IC**
    - This is particularly helpful for **Engagement Survey** reporting.
    - It splits the jobs in an org into **Managers** and **IC** using:

    - is:manager
    - is:ic

2024.07.18

Added

- Updated **Apps** management experience so that every active App that is syncing now has its own dedicated **Sync History** tab

2024.07.09

Added

- Updated **filter** experience in **Sync History** with two updates
    - **Filters** in **Sync History** are maintained after you navigate to details and return to the list
    - You can now send a **link** with any filters in the syncs
- Updated **ATS** syncs with **Greenhouse**, **Lever**, or **Jobvite** so that you can specify the **Announce Date** for **New Hires**

2024.06.05

Added

- Updated **Reviews and Surveys** with **Sheet and Individual Views** for **Form Responses**. Three new ways to view **Form Responses:**
    - **Summary:** Automatically generate a summary with every form based on submissions. Look at the form responses in the same order as the questions, with preconfigured response types to match the type of question. For instance, **Single Select** type of questions result in a chart showing popularity of answers, whereas **Short Text** type of questions result in a table of responses with optional AI summary.
    - **Sheet:** View the responses in a Data Sheet like view to scan across all the answers more quickly for a great compatitive view

- **Individual:** Dive into an individual form response to look at their answers as a complete submission.

Added

- Updated **Data Sharing Access** types for **Scenarios** including three new types
  - **Standard Data Access:** The user will only see changes within that scenario that they would be able to see within the current **Organization** (non-Scenario), given their access role.
  - **Limited Data Access:** The user will only see changes for jobs or people below them in the org chart. They cannot view or edit **Scenario** changes above them or outside their reporting line, regardless of their regular ChartHop access role. Limited editors cannot view the total cost summary.
  - **Full Data Access:** Overrides the individual's current user permissions, allowing them full access to all the changes to data in the scenario, which could potentially include sensitive information (such as compensation) depending on their **ChartHop Access Role**. It is recommended to only assign those **Permissions** to individuals who regularly have access to **Highly Sensitive** information.

2024.05.24

⚒ Fixed

- **Org Chart Exports** have been updated with four improvements
  - No longer showing Departments or Groups with zero headcount in Summary Table
  - Removed redundant color legend slide (previously followed the summary table)
  - Magnification/zoom level is now more consistent across slides
  - Removed tendency to show CEO on slides when leader of the Department/Group wasn't the CEO

2024.05.17

Added

- Expanded **Form** options include **Mobile** compatible **Standalone** format and ability to configure **Form** display name

2024.05.16

Added

- New **Core Views** page in **Admin** to configure default views for **Org Chart**, **Data Sheet**, and **Map**

2024.05.13

Added

- Can now schedule **Actions** to run on specific **Months** (for example, every 3 Jan, April, July, and October)

2024.05.03

Added

- Improved **Send Form** workflow within **Engagement Surveys** and **Performance Reviews** including ability to select to send forms via **Email** or **Slack**

2024.04.22

Added

- In **Org Chart**, improved default organization of **Fields** in **Visualize** dropdown to highlight most popular options at the top
    - Customize which **Fields** are highlighted and visible in **Visualize** dropdown

2024.04.17

Added

- Visualize multiple **Fields** in **Org Chart** (up to 3)

2024.04.11

Added

- New configuration options for **Home Page (**in **Admin)** with options to select or remove elements like Calendar, People Moves, etc

2024.04.05

Added

- Default **Notification** format now with **All Org** option
- Option to send forms to **Email** or **Slack** when sending via an **Action**
    -

2024.04.03

Added

- Automatically generated **Form Response Summaries** now with support for all question types

2024.04.02

Added

- **Roles & Permissions page** now with improved design

2024.03.25

Added

- 3 new **Single Change Workflows,** *aka* ***Simple Workflows*****,** added to **Scenarios** for **Headcount Planning** and **HRIS** modules**:**
    - **Create Job**: add a new job to your organization
    - **Update Job:** edit details on any existing job in your organization

    - **Terminate and Backfill**: submit termination details and optionally request a backfill

2024.03.17

Added

- **HRIS Module** is now available for purchase. HRIS is the 5th ChartHop module that works seamlessly with Headcount Planning, Compensation Reviews, Performance Reviews, and Engagement. The HRIS module includes:
    - Configure onboarding and onboarding workflows with custom forms, tasks, and messages
        - New **Onboarding** and **Offboarding** views under **People Ops Tools**
        - Track onboarding and offboarding progress from **Employee Profiles**
    - Create and share employee **Resource** pages for the whole company to access
        - Option to limit to specific Employees, **Departments,** and **Groups** with **Private** option
    - Manage **Time Off** with configurable request workflows and display who's out on the dynamic **Calendar** view
        - **Review, Approve,** and **Reject** Time Off requests directly in **Slack**
    - Sync payroll information from ChartHop to your payroll system with a two-way sync option for **ADP Workforce Now**

2024.03.08

Added

- Expanded options for recipients of **Actions** including **Onboarding Buddies**, **Peer Reviewers**, **Recruiters**, specific **People**, and any other custom option

2024.02.21

Added

- **Tasks Page** is now available on the **Profile** as a **Profile Tab**. This provides more visibility into current and past tasks including state like pending, completed, or skipped.

2024.02.16

Added

- **Fields** table in the **Data Model** > **Fields** view has been upgraded with many new features. It is more performant and with a refined UX including resizable columns, sort options, field types visible, and much more.

2024.02.07

Added

- **Build-In Fields** are now configurable to tailor them to your organization including changing **name**, **category**, **description**, and **sensitivity type**.

2024.02.01

Added

- **Field Types** are now enhanced with icons to improve findability and user experience. These icons appear in **create/edit field** workflows and when adding **questions to forms**.
- Ability to **tag** or reference another person with an **@** symbol through the ChartHop platform. Just start typing @ in a text editor and option to select a person will appear. That tag then creates a link to that person's profile.
- **Form Response Summaries** are now available in **Forms**, **Reviews**, and **Surveys**. ChartHop will now automatically create a summary for a form, ordering responses in the same sequence as the form was designed, and generating charts to look at aggregate data for most types.

2024.01.25

Added

- **Automated Actions** now include ability to set custom subject lines for emails

2024.01.22

Added

- New **Navigation** and organization for the ChartHop app including:
  - Updated and redesigned left sidebar menu with improved organization of ChartHop capabilities and options
  - Updated top utility bar with company logo, breadcrumb navigation, global search, and buttons to access Help, Notification Center, Hide Sensitive Information filter, and User Settings.
  - New quick Help options include Ask AI option, quick links contextual to page user is on, and quick links to Help Center and Carrot (CQL) Reference.
  - Detailed information about the new navigation found **here**.

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2023.12.19

Added

- Reports is now called **Dashboards** in the ChartHop navigation and throughout the app.
- **Surveys** now have a dedicated page within ChartHop called **Engagement** and no longer share the same page with Reviews. It is also possible to move any current or historic Surveys to Engagement for better organization.

2023.12.07

Added

- The **ADP Data Connector** app is now available for all customers. Connect your **ADP Workforce Now** instance to ChartHop in a matter of minutes.
- The **Workday Reports** app is now available for all customers. ChartHop can ingest people and job data from a configured **Workday Report**, to make data integration easier than ever.
- The **backfillFor** field now behaves the same way that an automatic backfill behaves, when looking at **Job History**.
- Now, if a new job is created as a backfill for an old job, the Job History for the old job will show up in the Job History of the new job, so ChartHop users can see the history of the job over time.

2023.12.06

Added

- **Carta** app now supported in **Sync History**.
- **E-Trade** app now supported in **Sync History**.

2023.11.17

Added

- Support for **Forms** to use some of the Built-in Person fields like **Gender**, **Ethnicity**, **Birth Date** and more

2023.11.13

Added

- Custom mapping to **Department** and **Office** fields now supported in Greehouse sync

2023.11.09

Added

- Two variations for the built-in **Role**, People Ops Admin:
  - People Ops Admin (No comp data)
  - People Ops Admin (No sensistive data)

2023.11.01

Added

- SFTP now supported in **Sync History**
- New built-in **Role**, People Ops Admin, which is an admin level role with access to sensitive data and workflow management

⚒ Fixed

- Syncing **Profile** images with Slack now more reliable

2023.10.25

Added

- Ability to access **Profiles** of departed employees

2023.10.23

Added

- Ability to uninstall **Bundles** including ability to uninstall associated fields as part of the uninstall process

2023.10.13

⚒ Fixed

- Bug Fixed with **Filters** when selecting Field Category, it now generates the correct selectable list to choose from

2023.10.12

Added

- Updated **Forms** and **Reports** tables

2023.10.10

⚒ Fixed

- Bug Fixed with Images syncing from ADP integration

2023.09.29

Added

- Ability to share **Reports**, **Scenarios**, and **Datasheets** with Departments and Teams
-

2023.09.28

Added

- Updated **Tasks** list on the home page
- Added ability to add “soft” or “hard” deadlines to a form within a **Review**
- Added ability to allow forms to be skipped within a **Review**
- Added new graph for monitoring progress within a **Review**

2023.09.20

Added

- **View As** now supports viewing as a person not yet invited to the organization

2023.09.19

Added

- Updated design of **Forms** settings page so it is better organized and easier to understand

2023.09.18

Added

- New **Scenarios** view consolidates all scenarios into one unified, sortable table. Update includes new bulk actions for combining, archiving, unarchiving, and deleting.

2023.09.14

Added

- New `scenario.merge` event that can be used to trigger **Actions**, such as notifications, when a scenario is merged
- Ability to close a form within a **Review**

2023.04.25

Added

- Added error handling when selecting ineligible user to notify after approval
- Added the "Powered by Carta" logo in the Equity tab
- New Carta App - UI Improvements
- Updated Sapling logo
- Show collaborators in reviews/approver config panel
- Performance improvements

⚒ Fixed

- Bug Fixed Comp Reviews Status tag does not change color
- ERROR for missing workdayID
- Restore spacing between person and job title on the history page
- Fixed issue with tabbing out of search box sets a "q" in the path resulting in a blank screen on refresh
- Formatting improvements for Rich Text Editor

2023.04.24

Added

New features

- Added the ability to mark fields as "Required" when opening and modifying jobs. **Learn more.**
- Added related comments to the email sent when a compensation review is rejected.
- Added the ability to select a fallback approver for scenarios in **Org settings**.

⚒ Fixed

- Fixed an issue where multipliers weren't showing when configuring compensation bands.
- Fixed an issue where the head of an org chart could not be edited in the **Job edit** dialog.
- Fixed an issue where updates to persons would falsely validate required fields.
- Fixed an issue where required fields were not enforced for the department field.

ATS App Integrations:

- Fixed an issue where the currency and interval fields from Lever would not map to the would not map to Lever's `compensationBand` object.
- Fixed an issue where the Lever-API failed when `compensationBand_Max` had a value.
- Fixed an issue where patch requests to re-open jobs were sent before deleting the opening in Greenhouse.
- Fixed an issue where pre-mapped jobs were transferred when matched to the job grouping criteria.
- Fixed an issue where newly generated req codes didn't appear in confirmation emails.
- Fixed an issue where multiple openings were created when setting jobs to active status.

2023.04.10

⚒ Fixed

- Fixed an issue where total compensation displayed the incorrect org currency in the **Compensation** tab in the employee profile.
- Fixed an issue where all grants associated with an employee did not display in the **Personal history** and **Equity grants** tabs in the employee profile.
- Fixed an issue where interval and currency values were not sent successfully to outbound integrations when compensation bands were updated.

- Fixed an issue where the **Equity grants** tab in the employee profile did not display the correct message when equity grants were not found.
- Fixed an issue where **Job history** tabs did not render correctly.

2023.03.27

Added

New features

- Added the ability to export compensation information in multiple columns. Provides the ability to make more detailed bulk edit compensation changes with a spreadsheet upload.
- Changed the Create and Edit field dialogs to use checkboxes instead of sliders.
- Added the ability to view the Slack ID for ChartHop users in the Data Sheet. Can help troubleshoot which ChartHop users have Slack IDs or not.
- Added the ability to map compensation band information from an external system to fields in ChartHop.

Scenarios:

- Added the ability to export comments from a Scenario.

Compensation reviews:

- Updated the Comp reviews module to require typing the word “launch” before confirming that you want to launch a Compensation review.

⚒ Fixed

- Fixed an issue where exported data was not reflecting the same values as shown in the Comp Review page.

2023.03.13

Added

New features

- Added support for using `variableTarget` sub-fields in CSV uploads and custom field mapping.
- Added the `BaseCompChanges` field which returns a list of the changes to a job's base compensation over time in chronological order.
- Added the ability to set effective dates for retired bands.
- Added a new **Stock Price Rolling Average** org option to support the ability to configure the number of days used in the average stock price calculation.

Org chart:

- Added improved color logic in the **Org chart** to help with readability.
- Added the ability to omit sensitive data when exporting an **Org chart**.

Scenarios:

- Selecting a collaborator's photo in **Scenarios** or **Compensation Reviews** opens sharing settings.
- Updated sharing options in **Scenarios** to be parallel in both name and order.

Compensation Reviews:

- Updated the **All Reviews due** date option to have the auto-skip checkbox unchecked by default on the **Key Dates** tab.
- Added the ability to export comments from a compensation review.
- Cycle owners have been relabeled as "Compensation Review Owner(s)".
- Added the ability for reviewers and approvers to be able to reject skipped proposals.

⚒ Fixed

- Fixed an issue where exporting `variableTarget` from the **Data sheet** with a `variableTargetPercent` would export the wrong `variableTarget` value.
- Fixed an issue where the **Save** button would not activate in the **Edit Job** modal when Hours Per Week, Weeks Per Year, hourly, or base were changed.

- Fixed an issue where even though `HoursPerWeek` and `WeeksPerYear` existed in the spreadsheet import wizard, they couldn't be used in uploads.
- Fixed an issue where `stockGrants` would return null when used in a template.
- Fixed an issue where **Smart Default Currencies** were not properly set when importing employee data syncs with non-US countries.
- Fixed an issue where `baseComp` or `baseComp.pay` fields would not have the same display settings as their parent fields when set in **Compensation Reviews** or **Scenarios**.
- Fixed an issue where ATS outbound syncs would take longer to complete for non-US clients.

2023.02.27

Added

New features

- Added the ability to enter an effective date when retiring compensation bands.
- Added the ability to edit Start Date at Org `startDateOrg` from the **Data Sheet** and through spreadsheet import.
- Added the ability to configure the number of days used to calculate average public stock price.
- Added the ability to edit Planned Start Date `startDatePlanned` through spreadsheet import and data sync.
- Added an option to export the **Org Chart** without employee names. Deselecting the new **Include employee names** option when exporting removes employee names from exported slides.
- Added an option to export the **Org Chart** with sensitive data (for example, certain open jobs). The new **Include sensitive data** option is selected by default when the sensitive data eye icon is toggled to visible. When sensitive data is hidden, you must select the **Include sensitive data** option to include sensitive data in the export.

- Added support for up to three linear approvers in scenario approvals (currently in Beta).
- Added ability for Basic ChartHop customers to disable birthday and anniversary actions.
- Added option to display and configure the number of decimal places used in tooltip labels for charts.
- Added the ability to edit hours and weeks directly within the Base `baseComp` field.

⚒ Fixed

- Fixed an issue where there was a discrepancy in calculations between stock valuation in Org Settings and in employee equity grant profile tabs.

2023.02.13

Added

New features

- Improved the error message that a user receives if a form won't load.
- Improved the naming convention for downloaded files to better indicate what is contained in the file:
  - **Reports (CSV format):** [org-name]-[chartName]-[timestamp].csv
  - **Reports:** [org name]-[reportName]-[timestamp].pptx
  - **Org charts:** [org name]-["org-chart"]-[timestamp].pptx
- Adjusted the table chart settings to include a more easily understood Show Total Column option.
- Adjusted where missing location information is shown on the Map page.

Compensation reviews:

- Added support for a custom effective date for primary data used for a compensation review. Setting an effective date for primary data allows compensation review owners

to control the date that employee data, including compensation and reporting structure, is used as a basis for a compensation review.
- Added the ability to manually skip a reviewer during a compensation review.
- Added the ability for reviewers and approvers to choose a different currency in budget visualizations for a compensation review.

⚒ Fixed

- Fixed an issue where users could not visualize the Org chart by base salary.
- Fixed an issue where not all data was displaying for Compensation bands.

2023.01.31

Added

New features

- To better reflect current functionality, the **Delete compensation bands** button has been renamed to **Retire compensation bands**
- Added support for reports to allow y-axis ticks to include smart maximums and evenly spaced tick intervals.
- Added the ability for ATS inbound job data syncs to fully process jobs without complete data.

Compensation reviews:

- Added the new **Reviewer** dropdown in the **Full team overview** tab, which allows you to view all employee pods that a reviewer/approver is responsible for in a compensation review.
- Added support for the department, manager, reviewer and Carrot filters to be applied to the budget visualizations on the **Full team overview** tab.

Carrot:

- Changed the `startDate()` function to update from the "planned" start date to the "actual" start date once the job has been filled.

- Changed the `startDateOrg()` function to update from a "NULL" start date to the "actual" start date once the job has been filled.
- Updated the Planned grant field by splitting it into three distinct fields:
  - Planned grant
  - Planned grant (shares)
  - Planned grant (value)

⚒ Fixed

- Fixed an issue in the **Greenhouse ATS integration app** where job codes matched using the 'Group Job Openings' setting when "Title" was set to "None" would not create job openings under their respective matched jobs.
- Fixed an issue where the custom conversion rate would not allow any value above four characters in the **Currencies and Costs** tab of **Org settings**.
- Fixed an issue where spreadsheets for bands with custom job levels were missing the "Delete" column in the job levels tab when exported.
- Fixed an issue where "base" would not display for employees when selected from the **Visualize** dropdown in the **Org chart**.
- Fixed an issue where point markers were being incorrectly cropped in line and area charts.
- Fixed an issue where cloning a report with the **Ignore report filters** option toggled on, would result in the new report having the feature toggled off.
- Fixed an issue where tier values couldn't be duplicated between band tiers.
- Fixed an issue where job cards in PowerPoints would not have any color applied to them when exporting an org chart to PowerPoint if the **Highlight boxes** option was set to the default value of "Department and Team".
- Fixed an issue where text content in the **Compare** field in **Reports** could not be deleted.
- Fixed an issue where the **About** tab in employee profiles did not properly display start dates for upcoming new hires.
- Fixed an issue where comp band job groupings did not display in the same format they were uploaded in.

- Fixed an issue where creating new bands with previously used job level IDs would result in errors.
- Fixed an issue where downloaded spreadsheet templates for bands with multipliers were missing their multipliers.
- Fixed an issue where band locations would not update when using the wizard.
- Fixed an issue where failed ATS webhooks did not show error messages in the **Sync History** page.
- Fixed an issue where org charts wouldn't generate when applying filters to the embeddable org chart app.

2023.01..17

Added

New features

- Added the ability to edit the `baseComp` field so that users can update hourly and annual compensation from the same field when performing budget allocations in compensation reviews or in the **Data Sheet**.
- Compensation bands graphs have been updated to display band levels more clearly.

Compensation reviews:

- Added the ability to automatically skip incomplete approvals and mark them as **Skipped** after the All reviews due date passes. This clears any remaining To-dos for lower-level approvers and allows final approvers to complete their final approval.
- When the new **Skip incomplete reviews after due date** option is selected, the **All reviews due** field is disabled automatically once a cycle has been launched to prevent changes from being made.
- To prevent any errors, the Final approvals due date cannot be edited after the compensation review has been launched.
- To better align with its functionality, the **Send Reminder** option is available only from the **Cycle Overview** tab for compensation review owners.
- Added a more streamlined Final Approvals page for final approvers.

- Added the ability to use custom column header colors in the reviewer workbook.

Integrations

- Outbound error messages on the **App Sync History** page have been updated to display more helpful and informative error messages.
- Added the ability for the Workday Adaptive Planning app to automatically have access to all scenarios, compensation reviews, performance reviews, and headcount plans that are configured to be available for import in the app.
- Added support for multi-select fields for custom field mapping.
- Added the ability for Greenhouse users to be notified of any sync failures.

⚒ Fixed

- Fixed an issue where loading anniversaries and birthdays on the dashboard prevented users from clicking links on the page.
- Fixed an issue where compensation bands data did not display completely when the Table view was selected.
- Fixed an issue where changes were not saved when trying to update a single-select custom field using the **Edit job** option.
- Fixed an issue where template filters were interpreting commas incorrectly.
- Fixed an issue where statuses in the **App Sync History** page displayed inconsistently.
- Fixed an issue where the **History** page was not refreshing after changes were made based on filter and display selections.
- Fixed an issue where custom fields displayed with incorrect capitalization and multi-select fields were truncated incorrectly in Edit dialogs.
- Fixed an issue where users could not select a value within a field because the value had an extra space at the end, which caused errors.
- Fixed an issue where the Workday Adaptive Planning app would display an error when it did not have access to a scenario or compensation review that was not shared with the app.
- Fixed an issue in reports charts where selecting the **% of total** option as an aggregation caused an error with the value formatting in the chart.
- Fixed an issue where payroll syncs did not sync images correctly to ChartHop.

- Fixed an issue where indicators on the x-axis were incorrectly cropped in horizontal bar charts.
- Fixed an issue where the ATS Req ID value was not updated after outbound job creation failed.
- Fixed an issue where manually hiring a person in ChartHop did not update the recruit status to **Pending**.
- Fixed an issue where adding a new job to a scenario and exporting the **Org Chart** in the scenario caused an error.

Release Notes from 2022

9.4. Release Notes Archive 2022

9.4.1. December 2022 release notes

12.19.22

Added

New features

- Added new costBetweenPrimary functions that calculate the cost of jobs over a specific time period, including future roles with announced start dates:
  - baseCostBetweenPrimary
  - variableCostBetweenPrimary
  - cashCostBetweenPrimary
- Added the ability for users to specify the calculation type for data values in the top row of tables shown in reports. The following options are now supported: sum, avg., min, max.

Fixed

- Fixed an issue where the total organization member count in the **Map** did not match the total organization member count in the **Data Sheet**.
- Fixed an issue where the Greenhouse integration did not match on existing jobs when the **Match by Job Codes** option was toggled on and the **Group by Job Openings** option was set to *none*.
- Fixed an issue where Greenhouse “Recruiting Status” emails incorrectly triggered when changing the announce date.
- Fixed an issue where the Source field was incorrect when using a custom rate in the **Currencies and Costs** section of **Org settings**.
- Fixed an issue where custom short text fields would clear when saved.
- Fixed an issue where Y-axis tick marks were not properly aligned in scenario charts.

12.05.22

Added

New features

- Added the ability for compensation review owners to select their launched compensation reviews from the **Scenario** dropdown in ChartHop reports. This enables owners to visualize updated compensation reviews data in reports.
- When a chart in a report is cloned, the settings and filters for that chart are maintained in the duplicated chart.
- Updated the way that **Org Chart** nodes display in PowerPoint exports so that members of unselected departments or teams display as faded.

Integrations

- Updated the Sync History page with improved and more actionable outbound error messages to make it easier to identify issues.
- Updated error handling for outbound ATS syncs to better accommodate bulk actions/changes in ChartHop.

⚒ Fixed

- Fixed an issue where the second line in an address prevented the location for an employee from displaying in the correct location.
- Fixed an issue where deleting an open job in a ChartHop scenario incorrectly sent an outbound delete request to the ATS.
- Fixed an issue where the top row of a data table only showed the sum of the data in the columns, even when another calculation (for example, mean) was selected.
- Fixed an issue where a PowerPoint export of the **Org Chart** displayed certain nodes incompletely in the PowerPoint slides.
- Fixed an issue where selecting the **Export** button from the Impact tab of a scenario did not export the reports.

- Fixed an issue in the embeddable **Org Chart** where users could only search by department.
- Fixed an issue where a reporting line did not display correctly in the **Org Chart**.
- Fixed an issue where a repair warning displayed in PowerPoint for reports that were exported.
- Fixed an issue where editing an employee’s salary caused the currency to default to USD, even when the previous salary value was not defined in USD.

9.4.2. November 2022 release notes

11.21.22

Added

- Updated the top banner to list Active Open jobs instead of Total jobs.
- Axis labels are included on the following charts for easier interpretation:
  - Area graph over time
  - Bar chart
  - Bar chart over time
  - Line chart over time
- Updated when the About Me panel is displayed. If no information has been entered, employees with edit permission are prompted to add information. If the tab is empty and the employee cannot edit it, the About Me tab is not shown.
- Updated when the Job Description panel is shown. If the tab is empty and the employee cannot edit it, the Job Description panel is not shown.
- ChartHop reports have been updated so that scenarios with a scenario type of Compensation planning are categorized as Comp Scenario in the **Scenario** dropdown.
- New hires from Jobvite are included on the Sync History page.

Fixed

- Fixed an issue where calculated fields were not being summarized correctly on the Data Sheet page.
- Fixed an issue where the two-letter abbreviation for Indiana was not displaying correctly on the Map page.
- Fixed an issue where the currency symbol for the Dinar was not displaying correctly.
- Fixed an issue where duplicate Greenhouse openings were being created.

- Fixed an issue where ChartHop indicated a successful save when app settings failed to save.
- Fixed an issue where Greenhouse and Lever metrics syncs were not finishing.

11.08.22

Added

New features

- Updated **Sync history** to provide more detailed information during sync errors.
- Added support for specifying rounding preferences on comp primitive fields with rounding settings.
- Added new Carrot functions for calculating the compensation of a person between dates:
  - `baseCompBetween()`
  - `variableCompBetween()`
  - `cashCompBetween()`
- Added the ability to bookmark the current dates in the **Org chart**, **Data Sheet**, and **Maps**.
- Added the ability for the format dropdown to auto-select a number format based on the selected measure in the chart builder.
- Added the ability to apply specific filters to charts using the filter tool.

Integrations

- Updated the **Carta sync** to no longer set a default vesting schedule when synching an unsupported schedule.
- Added support for same day **ATS outbound delete syncs**.

⚒ Fixed

- Fixed an issue where `lastRaise` field calculations did not support rehires.

    - **Fields updated:**
        - `Base – last raise %`
        - `Base – last raise amount`
        - `Base – last raise amount (org currency)`
        - `Base – last raise date`
        - `Base – last raise type`
        - `Base – months since last raise`
        - `Target variable - last raise %`
        - `Target variable - last raise amount`
        - `Target variable - last raise date`
        - `Target variable - months since last raise`
    - **Fields deprecated**:
        - `baseRaisePercent`
        - `baseRaiseAmount`
        - `baseRaiseDate`
- Fixed an issue where Lever New Hire Webhook fields were shown as being updated in **Sync history** details despite not being updated.
- Fixed an issue where Greenhouse job creation stepper fields in **Sync history** details were not human readable.
- Fixed an issue where `change.baseRaisePercent` in a comp scenario did not retain the hours/week and weeks/year.
- Fixed an issue where updates were being sent to an ATS when a job was filled or had a person starting.
- Fixed an issue where **Lever requisitions outbound sync** processes could not be seen in the **Sync history** list view.
- Fixed an issue where our **SFTP app** field mapper configuration was case sensitive.
- Fixed an issue where the export settings were not being preserved when exporting the **Org chart**.
- Fixed an issue where outbound calls were not being made when jobs were set to Active in Greenhouse.

- Fixed an issue where the About me panel did not display user’s start dates.
- Fixed an issue where columns were not resizing properly on the **Data sheet**.

9.4.3. October 2022 release notes

10.24.22

Added

New features

- Added an updated version of **App sync history**, which allows you to view the data sync history of all payroll, equity, and ATS apps installed in your ChartHop organization.
- Added support for decimal rounding for Base values in ChartHop.
- Added the new `asOfPrimary` function to return data as of a specific date only from an organization's primary branch.
- Updated window size so that **Org Chart** exports are clearer and more legible.

Integrations

- Added the option to export all Greenhouse jobs, including those that are closed, to a .csv file.
- Added the ability to send `Delete` outbound ATS requests to both Greenhouse and Lever from ChartHop.
- Added a new spinning indicator that displays when process events are loading for inbound hire webhooks and outbound event-based syncs.

⚒ Fixed

- Fixed an issue where users could not update the target variable currency in compensation reviews.
- Fixed an issue where compensation bands did not display alphabetically in the **Compensation bands** column dropdown in the **Data Sheet**.

- Fixed an issue where compensation bands were not sorting properly in the **Data Sheet**.
- Fixed an issue where changes were incorrectly combined in the primary branch of an organization.
- Fixed an issue in a compensation review preview where editing a field in the reviewer workbook cleared pre-populated values.
- Fixed an issue where the employee count did not accurately reflect visible employees when the time slider or additional filters were applied.
- Fixed an issue where the map placed people in the middle of the US when their location or address only contained a state and country.
- Fixed an issue where hidden fields continued to display in the **Visualize** dropdown.
- Fixed an issue in the Cash compensation history where the **Change** column displayed a value incorrectly.
- Fixed an issue where errors occurred when syncing to Sequoia One.
- Fixed an issue where ChartHop tried to match by job code even though no job code was provided during an ATS sync.
- Fixed an issue where reports did not reflect all scenario changes.
- Fixed an issue where headcount numbers and totals did not match when the org chart was exported as a Powerpoint.
- Fixed an issue where filters that were applied to a report did not carry over when the report was downloaded to a .csv file.
- Fixed an issue where the **Impact** tab in Scenarios did not display forecasting information correctly.
- Fixed an issue where the **Base Raise Amount** and **Base Raise %** columns displayed incorrect amounts when the pay interval was changed to yearly in the reviewer workbook during a compensation review preview.
- Fixed an issue where the default views in the **Data Sheet** kept including deprecated fields.

10.11.22

Added

New features

- Added the ability to link to compensation review fields in ChartHop templates, which allows you to generate content including letters that inform your employees about a raise.
- Made cross-tabs optional in bar chart reports. The option to add them defaults to ‘None.’
- Added new language on the Reports page that reads ‘Duplicate’ instead of ‘Clone.’

Integrations

- Updated the ChartHop Workday app to adjust job statuses based on how you set them in the Workday ATS. When you close formerly open jobs, the app sets those jobs to 'Inactive'. When you fill open jobs, the app sets those jobs to 'Pending'.
- Added a Recruiter Actions bundle that allows you to notify users by Slack or email about new Active jobs or existing jobs that are now Active.

⚒ Fixed

- Fixed an issue where new hires appeared early in ChartHop despite having their announce dates manually updated.
- Fixed an issue where custom views in scenarios did not load correctly.
- Fixed an issue where reports with a Y-axis displayed duplicate measures.
- Fixed an issue where Org Chart groups did not display correctly for people with multiple groups.
- Fixed an issue where the ChartHop logo did not display correctly in Powerpoint report exports.
- Fixed an issue where reports with scenarios did not add their proposed new jobs to the organization’s headcount.
- Fixed an issue where reports exported to Powerpoint improperly displayed tooltips and scrollbars.
- Fixed an issue where some open jobs weren’t received during a sync of the ChartHop Workday app.

- Fixed an issue where contractors weren't properly recognized in the ChartHop Workday app.
- Fixed an issue where the ChartHop Workday app did not sync both employee information and open jobs simultaneously.
- Fixed an issue where ‘Additional fields’ did not appear in the tooltip displayed when hovering over fields in the ‘Select columns’ dropdown menu on the Data Sheet.
- Fixed an issue where including ‘file’ type fields would prevent a .csv upload from being read correctly by ChartHop.

9.4.4. September 2022 release notes

09.28.22

Added

New features

- Added the ability to set **smart currency defaults** for monetary values that are imported into ChartHop without a specified currency.

09.26.22

Added

New features

- Added new fields to allow more flexibility for tracking start and end dates. You can track transfers and moves more easily by tracking start and end dates in particular jobs as well as when an employee starts or ends employment in your organization as a whole.
    - The following new fields were added:
        - *Start Date in Job*
        - *End Date in Job*
        - *Start Date at Org*
        - *End Date at Org*
        - *Tenure in Job*
        - *Tenure in Org*
        - *Planned Start Date*
        - *Start Date*

    - The following fields were deprecated:
        - *Job Start Date*
        - *Person End Date*
        - *Person Start Date*
        - *Tenure*
- Added the ability of users to duplicate reports and re-assign ownership of the duplicate report. This makes it easier to keep reports when the report owner leaves the company.
- Moved chart legends to be centered at the bottom of the respective chart.
- When creating a chart, you can toggle between a basic and advanced mode. This allows you to more easily choose when to write specific queries in Carrot, ChartHop's query language.

⚒ Fixed

- Fixed an issue where hourly compensation rounding was not displaying consistently.
- Fixed an issue where smart calculations were not showing decimals when used in the Scenario Data Sheet page.
- Fixed an issue where users could not rearrange series data when creating a new chart.

09.15.22

Added

New features

- Released a new and revamped version of **Compensation reviews**.

09.12.22

Added

New features

- Added the ability to set the Data Sheet view to the current date. You can share dynamic views that retain the current date.
- Added a metric/KPI field Time to Fill which is measured by the difference between the start date for recruiting and the end date when a candidate accepts an offer.
- Added a field baseCompChanges which contains a list of compensation history, starting from a person's start date.
- Added a new Carrot filter of is:NewTransfer to filter for internal transfers.
- Added a new Carrot filter is:recentHire to filter for a person’s job start date.
- Added the new org option hideEquityValuation. You can hide your org’s company valuation alongside the value calculator in the Equity Grants tab.
- Bar charts display a legend when two dimensions are added.
- The following new compensation fields were added:
    - Base
    - Variable
    - Compa ratio

⚒ Fixed

- Fixed an issue where not selecting ‘Include Open Jobs’ when exporting a PowerPoint from the Org chart resulted in a presentation where the slides only showed one employee each.
- Fixed an issue where ISOs and NSOs were not split into individual stock grant options.
- Graphs that contain either long labels or more than 11 labels now correctly flip in orientation.
- Fixed an issue where removing Cross tab or Compare options in the Chart builder would not remove the series and break the chart.
- Fixed an issue where in managed groups, the color swatches in the list did not match what was available in the Org chart.

9.4.5. August 2022 release notes

08.29.22

Added

New features

- Added the ability for the `recruiter` and `hireMgr` fields to persist after the person has been hired. You can use these fields to identify people hired by a specific recruiter.
- For increased transparency, the Job History, Personal History, History, and Org Chart history more clearly indicate when ChartHop has made changes to your organization's data.
- Enum data types with 0 values are treated as a numeric 0 and considered false.

Fixed

- Fixed an issue where the list of saved views in the Data Sheet remained hidden when the browser window was resized and increased.
- Fixed an issue where the date picker continued to display even after you clicked outside the focus area.
- Entering an Other Location address and then toggling between the Office and Home tabs no longer deletes the Other Location address in the **Set work location** dialog.
- Changing compensation bands within a Compensation Planning scenario no longer causes the horizontal scroll bar to jump to the far left.
- Fixed an issue where the columns in an exported .csv did not match the order of the columns in the Data Sheet.

08.15.22

Added

New features

- ChartHop forms support the use of Carrot Query Language templates.
- Added the `historicBackfill` field, with which users can view all previous backfills for a position on the Job history page.
- ChartHop built-in and custom fields support percentage data types expressed in decimals as well as whole numbers.
- Launched expanded functionality in the Currencies & costs tab in Org settings to allow you to better manage multiple currencies, view currency rates, and set custom rates.

Integrations

- The ADP app syncs the date of compensation changes into ChartHop.
- Updated Slack app permissions require an app reinstall in order to send direct messages.

⚒ Fixed

- Fixed an issue where departure status (voluntary or involuntary) as well as departure reason was not synced from the ADP app.
- Fixed an issue that caused some payroll app syncs to fail.
- Addressed issues that caused some ATS app syncs to display in multiple rows and ATS .csv exports to incorrectly appear on the Sync History page.
- Fixed an issue that caused Greenhouse app syncs to use the job creation date instead of the sync date.
- Addressed multiple issues where field rounding settings did not save correctly.
- The correct currency options appear when editing fields on the Data Sheet.
- Org editors and Sensitive data viewers can use *View as* on other user profiles.

08.01.22

Added

New integrations

- Launched our first FP&A integration, our Workday Adaptive Planning app.
- Continued support for Rippling integration. Deprecated the legacy Rippling app and added a new one.

Enhancements

- Ability to ensure imported data matches a ChartHop field before importing
- Added the ability to ensure data matching between import fields and ChartHop fields before importing data.
- Added ability to clear date and percentage field values from the Data Sheet page and Edit job dialog.
- Added the ability to configure money field values to display as either rounded or exact.
- Made usability enhancements for the Slack app.
- Made usability enhancements to the E*Trade app and the Carta app.
- The right side of the About tab on the Employee Profile is divided into three areas: About Me, Personal Data, and Manager-Shared.
- Supports integrating with a Lever sandbox for easier app testing during implementation.
- Added a more intuitive status message for on-demand sync operations.

⚒ Fixed

- Fixed an issue that caused rounding when exporting hourly compensation information.

9.4.6. July 2022 release notes

07.18.22

Added

- Usability enhancements for identity apps
- Usability enhancements for equity apps

07.05.22

Added

- Added equity sync information to the sync history page
- Added ATS sync information to the sync history page

⚒ Fixed

- Updated validation rules around max values for fields
- Fixed issues with sharing reports

9.4.7. June 2022 release notes

06.20.22

Added

- Added user notification for how future start dates are handled when importing employee data
- Added Help icon for ChartHop Basic
- Usability enhancements for payroll apps

Fixed

- Error when attempting to share report
- Org Chart: Edit window appears behind the employee card
- Remove gap between user list and data sharing buttons
- Base fields - Updates in the billions not allowed
- "Next Step" grayed out even though it's clickable in ChartHop Basic spreadsheet importer
- Report chart and edit views are inconsistent for users with custom-filter limited access
- Reports - is:person filter not limiting results
- Departures not showing involuntary/voluntary/reason for sensitive view.
- Manager is not able to edit compensation through edit job.
- Performance review bundle- Form, Reports, tabs not appearing after installing
- Embeddable Org chart not working as expected.
- Trying to fill a job with a new hire brings up a 404
- Pie Charts getting cut off
- Total comp calculation displaying incorrectly when the combined totals of base and variable are above 2,147,483,647
- Dashboard - Slowness loading anniversaries and birthdays
- Reports - is:person filter not limiting results

06.06.22

Added

- New compensation bands feature

⚒ Fixed

- Selecting large quantities of employees in datasheet (around 500+) is giving an error
- Remove column from Org chart node indicator tool tips
- Compensation Tab - Unable to clear/remove compensation data for backfill jobs
- Maps: International employees inconsistently appearing
- Map is not showing employees when adding or updating work location
- Message saying 0 imported employees for ChartHop Basic
- User list showing terminated employees
- Some spreadsheet data was importing incorrectly (ChartHop Basic)
- Data import screen appears blank (ChartHop Basic)
- Edit job module - yes/no fields will not save
- Ensure that downloaded filenames match displayed filenames
- Unable to add manager using dropdown in Data Sheet
- Change import spreadsheet text to note that startDate is required for the initial import
- Data sheet - cannot create new view
- Fix avatar on overlapping menu (profile)
- Org Chart - Export of org chart is being cut off
- 'Add Rule' getting cut off when adding multiple filters depending on zoom/window size

9.4.8. May 2022 release notes

05.12.22

Added

- The functionality of the Base Comp field has been changed in the import spreadsheet tool and will now support yearly and annual compensations.
  - **Annual Example:** 100,000 or 100,000/year
  - **Yearly Example**: 25.75/hour
- When you perform a one-time sync from a payroll app, you can choose to sync to your primary org, an scenario, or to a new scenario.

Fixed

- Issues completing data import for Gusto (ChartHop Basic)
- Category doesn't persist in the column chooser
- Issues completing data import for Gusto (ChartHop Basic)
- 'Add Rule' getting cut off when adding multiple filters depending on zoom/window size

05.03.22

Added

- User access roles were updated to reduce complexity and better reflect how these roles are used. Roles were renamed and two roles were deprecated. Learn more.
  - Deprecated roles include Time Off Viewer and Personal Contact Viewer.

Old role	New role
Member View	Employee
Member View (Limited Comp)	Employee (Limited)
Primary Editor	Org Editor
Owner	Owner
Recruiting Editor	Recruiting Editor
Recruiting View	Recruiter
Sensitive View	Sensitive Data Viewer
Cash Comp	Cash Compensation Viewer
Equity Comp	Equity Comp Viewer
Sensitive View (Limited Comp)	Sensitive Data View (Limited Comp)
Technical Owner	Technical Owner

⚒ Fixed

- Org Chart sometimes does not export any employees to PowerPoint
- Attrition reports not loading
- Multiple issues on the Scenarios page where the Org Chart does not export
- Scenarios page - Error exporting org chart to PowerPoint
- In the Groups details page, can't add/assign or remove people/open jobs to that group.

9.4.9. April 2022 release notes

04.25.22

Added

- The ability to use Job codes in the Greenhouse ATS App
- The ability to trigger Reconciliations both manually and automatically in the Greenhouse ATS and Lever Requisition Apps
- New and improved User management and Invite to Org features

⚒ Fixed

- Not all fields were available in the Filter dropdown list.
- Fixed an issue that prevented saving changes to some Groups.
- OR operator was not working for some queries
- Data Sheet filters were not changing when you switched views

04.16.22

⚒ Fixed

- Fixed an issue that disallowed special characters in the Group Name field in the Google Workspaces app.
- Fixed an issue that prevented saving changes to some Groups.

04.08.22

Added

- Org chart enhancements including refined zoom and Org chart node indicators

- The ability to trigger Reconciliations both manually and automatically in the Greenhouse ATS and Lever Requisition Apps
- New and improved User management and Invite to Org features

⚒ Fixed

- Fixed an issue causing BambooHR sync not to pull the **Depart** value in ChartHop.
- Fixed a bug preventing the **Filter out Contractors** option from working in the JustWorks app.
- Saving and leaving multiple unsaved views only saves one views change.

9.4.10. March 2022 release notes

03.25.22

Added

- Added the ability to reset the **Org chart** view to default.
- Added the ability to change the default **Org chart** view.
- Added a prompt to save unsaved work when closing a modified **Data sheet** view.
- Improved the responsiveness of the **Org chart** zoom function.
- Added usability improvements to **Data sheet** views.
- Added logic to prevent reverse ATS syncs from updating closed jobs in ChartHop.

Fixed

- Fixed a bug causing delayed email notifications about new hires in Greenhouse.

03.18.22

Added

- Added logic to change closed Lever requisitions to **Inactive** in ChartHop.
- Added the ability to customize the invitation email.
- Fixed a bug preventing the **Run daily** option from being automatically set once a Sequoia customer sets up their data sync.

Fixed

- Fixed an issue causing Greenhouse pending hire information to be filled into the wrong job.

03.11.22

Added

- Added support for **Jobvite Reverse sync**, allowing Jobvite to be the system of record when syncing.

⚒ Fixed

- Fixed an issue preventing Google Workspace from syncing Groups.

03.04.22

Added

- Added support for multiple templates by default for all Greenhouse app users.

⚒ Fixed

- Fixed an issue causing Maps to lag in larger orgs.
- Fixed an issue causing uncategorized fields to be hidden from the column chooser.

9.4.11. February 2022 release notes

02.25.22

Added

-

Fixed

-

02.18.22

Added

- Minor improvements to the **Data Sheet date picker** tool to improve consistency

Fixed

- Fixed a bug causing **Money values to display as USD** regardless of set currency
- Fixed a bug causing **Overall Headcount Per Month to display different numbers** when clicked
- Fixed a bug causing **hidden fields to appear** in the filter dropdown
- Fixed an issue causing the **Lever API to hit the rate limit** during ChartHop syncs
- Fixed a bug causing the **data contained within a report to change** upon refresh
- Fixed a bug **preventing the manager filter from displaying all available options**
- Fixed a bug preventing **pie chart previews** from displaying a scroll bar

02.11.22

✨ Added

- Increased the **maximum y-axis** value in Reports
- Added ability to **pull in Gusto custom fields**
- Added **support for new Carta vesting schedule** 2.0
- Added option to **filter out contractors** in Justworks sync

⚒ Fixed

- Fixed a bug **preventing custom color** editing on custom charts in Reports
- Fixed a bug causing **strange search behavior** in Reports
- Fixed a bug causing **duplicate entries in the Measure dropdown** in Reports
- Fixed a bug causing **duplicate backfills** in the Org chart
- Fixed a bug causing **Target Start Date to display as N/A** for all users
- Fixed a bug causing **discrepancy between Reports and Data sheet**
- Fixed a bug preventing **changes made in the Scenario Org Chart** from appearing in an export

02.04.22

✨ Added

- Renamed navigation items to improve context (ex. **Dashboard** is now **Home**)
- Added **improvements to the Delete functionality** in Custom fields

⚒ Fixed

- Fixed an error causing **Sync to Google Sheet to fail** in Google Workspace app
- Fixed a bug causing **area graphs to display a value of 100%** regardless of actual value

- Fixed a bug preventing **two Scenarios from merging** into one
- Fixed a bug causing **bulk changes** made on the data sheet to be **reverted** if the target person is located in Amsterdam
- Fixed a bug **preventing job description from updating** from the Job Profile
- Fixed a bug causing **line graphs to disappear** unless editing a chart
- Fixed a bug causing **exported charts to look different** from charts in the app
- Fixed **repetitive copy** in tooltips in Reports
- Fixed an issue preventing office-based employees from appearing on the MapFi
- Fixed an export error that appears when exporting to PDF in ChartHop

9.4.12. January 2022 release notes

01.28.22

Added

- Deployed **new design improvements to the Fields** module.
- Deployed **a new Sync history page**
- Deployed **new design improvements to the Apps** module featuring a redesigned list page and redesigned detail pages

Fixed

- Removed the ability to **change ordering of Numeric scale** fields after data has been collected
- Fixed issue **preventing Shares vesting column** from displaying accurately in **Data sheet**
- Fixed an issue causing CSV importer to ignore day values less than or equal to `12`
- Fixed an issue causing **Turnover not to be treated as a percentage**
- Fixed an issue causing comp history table in profile to display incorrect values

01.21.22

Fixed

- Fixed an issue causing **profile tab to disappear** when set to Manager only in **Custom profile tabs** page
- Fixed an issue **preventing Turnover from functioning in Pie charts** in Reports
- Fixed an issue **preventing Reviews filters from functioning** when paginated

- Fixed an issue **preventing Target start date from displaying values** containing `January 2022`
- Fixed an issue **causing Charts to display random info** in Reports
- Fixed an error **caused by cloning a job** with a smart bucket field
- Fixed a bug **disrupting the functionality of the Owner access** level

01.14.22

Added

- Deployed **design improvements to Scenarios: Impact** tab
- Added ability to **drag and drop charts** in Reports
- Added **improved x-axis labeling** on charts where x- and .y-axis have been flipped
- Improved **resizing of pie charts**
- Added ability to **measure base as a percentage** of total in Reports
- Added **cancel button when editing a chart** in Reports
- Added **filter by keywords** in Reports list page

⚒ Fixed

- Fixed alignment issue on **Change views** dropdown
- Fixed an issue **preventing the Preview function** from working on new charts in Reports
- Fixed an issue causing **bar charts to flip** if cross-tabs are present
- Fixed an issue **preventing x-axis decimal values from rounding up** to nearest integer in Reports
- Restored functionality of **permissions list modal** on Reports list page
- Fixed an issue causing **monthly totals to run one month ahead** of indicated date on a time series chart in Reports

01.07.22

✨ Added

- Deployed code to **enable tracking of locations** with more than 20 characters in ADP while syncing data
- Enabled **sorting Reports list page columns** by clicking on the column header
- Improved **legend tool tip** in Reports
- Added **new hire webhooks** to Lever and Jobvite apps

⚒ Fixed

- Fixed an issue causing **rogue Org Chart** lines to appear at certain zoom levels
- Fixed an issue causing **changes made during the current day** to be omitted from the Scenarios export
- Fixed an issue causing executive assistant **Org Chart lines** not to curve properly
- Fixed an issue preventing Scenarios from **recognizing editable fields** based on the `editable` flag
- Fixed an issue causing a specific **bundle not to import Form questions** correctly
- Fixed an issue **preventing Reports list page column from resizing**
- Fixed an issue causing strange behavior when sorting by **Created by** and **Last changed at** on the Reports list page
- Removed code causing **frequent loading screens** in the Reports list page
- Fixed a bug causing **missing data when viewing reports**
- Fixed a bug **preventing charts from populating** in the Reports module
- Fixed a bug causing **adjacent charts to change format** in Reports module
- Fixed **padding on buttons in Reports** module
- Fixed an issue **preventing ILS currency from functioning** in Data Sheet

9.5. Release Notes Archive 2021

9.5.1. December 2021 release notes

12.03.21

Added

- Added logic to **allow syncing of new hires** from the chosen ATS, even if there's no personal email
- Enabled **contractor data to sync from Gusto** to ChartHop
- **Remove truncation** from Org Chart Powerpoint Export
- Added an option to **break up slides** in the Org Chart Powerpoint export
- Increased the **maximum job title string length** supported by the Org Chart Powerpoint

⚒ Fixed

- Fixed an issue causing **opened jobs in ChartHop to appear in Greenhouse** even when the reverse sync is on
- Fixed an issue with the **Custom field limited** filter

12.10.21

⚒ Fixed

- Fixed an issue causing the **Hourly Compensation field** not to display while viewing the Compensation History tab
- Fixed an issue causing **duplicate emails** to be sent when an HRIS sync has failed
- Fixed an issue causing Org members with **Sensitive View (Limited Comp)** to lose access to custom fields
- Fixed an issue preventing the **Primary Editor of a Scenario from merging** it to the primary Org
- Fixed an issue with **modal transparency** on the login screen

12.17.21

Added

- Improved the **design of the Org settings page** to bring it in line with other design changes in the platform
- Improved the **design of the Manage users page** to bring it in line with other design changes in the platform
- Improved the **design of the Reset password page** to bring it in line with other design changes in the platform

⚒ Fixed

- Fixed an issue causing **file uploads to fail** on a Custom form
- Fixed an issue causing random employees to **lose access to the Scenarios module**

12.24.21

⚒ Fixed

- Fixed an issue causing **duplicate teams** to be displayed in the Teams dropdown when creating a job

9.5.2. November 2021 release notes

11.26.21

Added

- Added basic **new vesting schedule support** to ChartHop

11.19.21

Added

- Hid **Filter by Group** option when already filtered to **Departed Employees** to prevent filter conflict
- Added exhaustive **Charthop to Greenhouse** status mapping options
- Increased the **total number of errored records** viewable in the CSV importer

Fixed

- Fixed an issue preventing birth dates before `1/1/71` from **saving when the org date format** is `m/d/yy`
- Restored the ability for **Sensitive View (Limited Comp) Org members to add filters**
- Fixed an issue causing an **error on sync** in the E*Trade app
- Fixed an issue causing **configuration duplicates** in Apps & Integrations
- Fixed an issue **preventing the Slack app from connecting** and sending form updates from ChartHop

11.12.21

Added

- Added logic that ensures new jobs created using the Greenhouse webhook always have a **start date that is in the future** if it is not provided
- Added support for **offers send outside of Lever**
- Added logic that prevents **blank ChartHop fields** from being synced to the selected ATS

⚒ Fixed

- Fixed an issue preventing **form headers** from updating correctly
- Fixed an issue preventing **powerpoint export filters** from displaying all applicable departments
- Fixed an issue preventing the **Todo form response email** from displaying any information
- Fixed an issue preventing **hourly compensation** from showing up in the data sheet
- Fixed a bug causing the **Start Date to be inaccurate for Terminated Employees** when using the Export CSV feature from the Data Sheets module
- Fixed an issue preventing **filters applied to the Powerpoint Export** from displaying all applicable departments

11.05.21

Added

- Added a new **Lever Requisitions** description
- Moved the **Delighted survey** so that it doesn't block UI buttons

⚒ Fixed

- Fixed an issue preventing **Open Jobs** from displaying on a merged Scenario
- Fixed an issue preventing the **= (equals)** operator from working for groups with codes in the Reports and Data Sheets modules
- Fixed a bug causing the **Scenarios filter** to glitch
- Fixed an issue preventing the **Embeddable Org Chart** to filter

9.5.3. October 2021 release notes

10.29.21

Added

- Launched **improved Justworks app** using Justworks ID
- Added **support for custom field mapping** in Justworks app
- Added **support for filtering out people** by Justworks ID in new Justworks app
- Added functionality to **retain req / job codes from all ATS platforms**, even when an open job is filled
- Added functionality to **match Greenhouse jobs by a common string** within the job title, instead of the entire job title - reach out to your CSM if interested
- Added functionality to **support multiple Greenhouse job templates** based on Carrot logic - reach out to your CSM if interested

Fixed

- Fixed bug preventing users from **changing the `currency` type** by clicking into the Currency column in a Scenario
- Restored functionality that **closes openings in Lever when they are closed in ChartHop** and subsequently synced

Documentation

- Released new Apps documentation providing **reference content** on the functionality of many Payroll, ATS, Equity, and other apps
- Introduced the **Product updates section** - check back bi-weekly to see what's new!

10.22.21

Added

- Modernized the **form builder used in Reviews**
- Modernized the **Scenarios avatar popover**

⚒ Fixed

- Fixed bug preventing `Planned Grant` and `Title` columns from being **removed in Scenarios**
- Restored functionality of some **Org Chart export filters**
- Fixed bug preventing the value of `Date` being set to `Start Date` if `Start Date` is after the value of `Date` in a given scenario.
- Fixed `Cost` column not displaying data in Compensation Reviews.
- Fixed bug causing the Sapling integration to sync the value of `Hourly` as `Base`
- Restored functionality of `Change` column in Scenarios.
- Restored ability of users with `Owner` access to view sensitive entries in Custom Profile Tabs
- Fixed bug causing Paylocity fields to render `unknown error` when syncing
- Stopped Sequoia XHOP sync from failing when given an invalid phone number
- Corrected error message for inability to modify job creation date
- Fixed functionality of the back button from Data Sheets to Reports

10.15.21

Added

- Enabled pulling Lever custom fields into ChartHop, and changing the default field mapping

- Increased allowed maximum range of `Start Date` from the previous default

⚒ Fixed

- Fixed bug preventing date picker in filter bar from indicating invalid date inputs
- Fixed bug causing Performance Reviews PDF export to leave out certain people
- Removed `ethnicity` field from Zenefits app description because the integration does not sync it
- Fixed login HTML parsing errors in the Justworks app
- Swapped out the old Data Sheet link in the new Scenarios copy
- Matched exported and in-app time series visualizations in Scenarios
- Fixed formatting of Legend slide in PPT Org export
- Fixed Ultipro `employment-details` endpoint not adding termination dates correctly
- Ensured that template matcher failure won't cause failure in creation of job

10.08.21

□ Added

- Added navigation to global search
- Added correct handling of jobs without managers on Org Chart export
- Added several Admin Console improvements

⚒ Fixed

- Fixed bug causing the privacy toggle to hide data with Org Public sensitivity
- Fixed bug causing Scenario Changes tab not to update UI when archiving a change
- Fixed bug causing Custom Profile Tabs not to display long-text fields
- Fixed bug in Custom Forms caused by undefined Percent Min

- Fixed bug in Custom Forms causing incorrect field count in admin form search

10. Resources

10.1. ChartHop Modules

ChartHop offers five highly configurable modules for org leaders, people teams, and managers to power people operations and strategic planning decisions.



ChartHop HRIS



ChartHop Headcount Planning



ChartHop Compensation Reviews



ChartHop Performance



ChartHop Engagement



ChartHop Basic

10.1.1. ChartHop Basic

ChartHop Basic allows you to manage and visualize your organization with ChartHop pages such as the Org Chart, Data Sheet, and Map. You can integrate with one payroll system to sync your data. Several pre-built dashboards are provided.

ChartHop Basic includes the following features:

- Dashboard
- Map
- Data sheet
- Rich employee profiles
- Calendar
- SSO logins
- Org chart with filters
- Mobile Directory
- Standard 1:1 Forms and about me form
- Payroll integrations - one integration (more payroll apps are available for an additional fee)
    - BambooHR
    - Gusto
    - Justworks
    - Namely
    - Sapling Onboarding From Kallidus
    - Zenefits
- Slack + Carta integration

10.1.2. ChartHop Performance

ChartHop Performance includes the performance module and offers various performance cycle features including configurable forms for performance cycles and continuous performance management, live reporting dashboards for cycles indicating completion rates, the ability to collect and access historical performance data alongside key employee history, and allows visibility into historic performance data available to employee, manager, and leadership based on permissions.

ChartHop's Performance Module empowers you to do the following:

- Everything in **ChartHop Basic**
- Choose from a larger selection of payroll integrations
- Manage access according to organizational roles, including custom roles
- Configure mapped and custom fields
- Store documents
- Create custom dashboards
- Configure, Manage, and Run Performance Reviews
- Receive assistance from ChartHop to create custom document templates (up to six)

10.1.3. ChartHop Engagement

ChartHop Engagement includes the Engagement module and offers various engagement survey features including configurable engagement, eNPS, and pulse surveys. This module also includes customizable onboarding, exit, Self ID, and DEI surveys. It also includes configurable reporting dashboards for managers, executives, and the people team.

ChartHop's Engagement Module empowers you to do the following:

- Everything in **ChartHop Basic**
- Choose from a larger selection of payroll integrations
- Manage access according to organizational roles, including custom roles
- Configure mapped and custom fields
- Store documents
- Create custom dashboards
- Engagement Survey Module
- Configure, Manage, and Run Engagement Surveys
- Slack integration for public shoutouts
- Receive assistance from ChartHop to create custom document templates (up to five)

10.1.4. ChartHop Compensation Reviews

ChartHop Compensation Reviews, includes the Compensation Reviews module, and offers various employee management features such as flexible budgets, guidelines, and approval workflows tailored for your organization, configurable compensation bands including base, variable, equity, and currencies and live budget updates.

ChartHop's Compensation Reviews Module empowers you to do the following:

- Everything in **ChartHop Basic**
- Choose from a larger selection of payroll integrations
- Manage access according to organizational roles, including custom roles
- Configure mapped and custom fields
- Store documents
- Create custom dashboards
- Configure, Manage, and Run Compensation Reviews

10.1.5. ChartHop Headcount Planning

ChartHop Headcount Planning includes the Scenarios module, and offers various employee management features such as customizable approval workflows, live reporting dashboards to visualize budget, team, and DEI impact, and real-time budget impact calculation. With our Headcount Planning module, you can easily build plans for growth, reduction, or reorganization, without spreadsheets

ChartHop's Headcount Planning Module empowers you to do the following:

- Everything in **ChartHop Basic**
- Choose from a larger selection of payroll integrations
- Manage access according to organizational roles, including custom roles
- Configure mapped and custom fields
- Store documents
- Create custom dashboards
- Configure, Manage, and Run Headcount Planning Scenarios
    - Includes the following Scenario types:
        - Create Job
        - Update Job
        - Terminate & Backfill
        - Promotion Planning
        - Budget Scenario
        - Custom Scenario
    - Configure, Manage, and Run Approval Workflows
- Receive assistance from ChartHop to create custom document templates (up to three)
-

10.1.6. ChartHop HRIS

ChartHop HRIS includes many capabilities to ensure you can run your org from a single source of truth. Capabilties include People Ops tools including Onboarding and Offboarding, Time Off management, Employee Resources, Custom Calendars, Simple Job Request Workflows, Push to Okta/Google, and much more.

ChartHop's HRIS empowers you to do the following:

- Everything in **ChartHop Basic**
- Choose from a larger selection of payroll integrations
- Manage access according to organizational roles, including custom roles
- Configure mapped and custom fields
- Store documents
- Create custom dashboards
- Configure, Manage, and Run Simple Headcount Planning Scenarios
    - Includes the following Scenario types:
        - Create Job
        - Update Job
        - Terminate & Backfill
    - Configure, Manage, and Run Approval Workflows
- Create Resources (Intranet style organizational documents)
- Create Custom Calendars
- Configure, Manage, and Run Onboarding and Offboarding Workflows
- Manage Time-Off
- Integrate with Okta / Google
    - Provision single sign-on with accurate org groups and roles
-

10.2. ChartHop Standard Terms and Conditions

PLEASE READ THESE TERMS AND CONDITIONS (“TERMS”) CAREFULLY BEFORE PURCHASING AND/OR USING THE SERVICES OFFERED BY CHARTHOP, INC. (“CHARTHOP”). BY SIGNING AN ORDER FORM WHICH REFERENCES THESE TERMS (AN “ORDER FORM”), YOU AND THE ENTITY YOU REPRESENT (“CUSTOMER”) ARE UNCONDITIONALLY CONSENTING TO BE BOUND BY AND TO BECOME A PARTY TO THESE TERMS (TOGETHER WITH ALL ORDER FORMS, THE “AGREEMENT”) TO THE EXCLUSION OF ALL OTHER TERMS. THESE TERMS INCLUDE AND INCORPORATE ANY APPLICABLE ORDER FORM MUTUALLY EXECUTED BY CHARTHOP AND CUSTOMER.

1. ACCESS TO THE SERVICE
   Subject to Customer’s compliance with the terms and conditions of this Agreement (including any limitations and restrictions set forth on the applicable Order Form) ChartHop grants Customer the right to access and use the services specified in each Order Form (collectively, the “Service,” or “Services”) during the applicable Order Form Term (as defined below) for the internal business purposes of Customer, only as provided herein and only in accordance with ChartHop’s applicable official user documentation (the “Documentation”).

2. IMPLEMENTATION
   Upon payment of any applicable fees set forth in each Order Form, ChartHop agrees to use reasonable commercial efforts to provide standard implementation assistance for the Service only if and to the extent such assistance is set forth on such Order Form (“Implementation Assistance”). If ChartHop provides Implementation Assistance in excess of any agreed-upon hours estimate, or if ChartHop otherwise provides additional services beyond those agreed in an Order Form, Customer will pay ChartHop at its then-current hourly rates for consultation.

3. CUSTOMER CONTACT
   Customer will designate an employee who will be responsible for all matters relating to this Agreement (“Primary Contact”). Customer may change the individual designated as Primary Contact at any time by providing written notice to ChartHop. The Primary

Contact shall designate “Owners” and “Technical Owners” who have the ability to create and distribute accounts and login credentials. Customer shall be responsible for the use and activity in connection with all such accounts.

4. SERVICE UPDATES

   From time to time, ChartHop may provide upgrades, patches, enhancements, or fixes for the Services to its customers generally without additional charge (“Updates”), and such Updates will become part of the Services and subject to this Agreement; provided that ChartHop shall have no obligation under this Agreement or otherwise to provide any such Updates. Customer understands that ChartHop may cease supporting old versions or releases of the Services at any time in its sole discretion; provided that ChartHop shall use commercially reasonable efforts to give Customer sixty (60) days prior notice of any major changes.

5. FEEDBACK

   Customer may from time to time provide suggestions, comments, or other feedback to ChartHop with respect to the Service (“Feedback”). Feedback, even if designated as confidential by Customer, shall not create any confidentiality obligation for ChartHop notwithstanding anything else. Customer shall, and hereby does, grant to ChartHop a nonexclusive, worldwide, perpetual, irrevocable, transferable, sublicensable, royalty-free, fully paid-up license to use and exploit the Feedback for any purpose.

6. OWNERSHIP

   As between the parties, ChartHop retains all right, title, and interest in and to the Services, and all software, products, works, and other intellectual property and moral rights related thereto or created, used, or provided by ChartHop for the purposes of this Agreement, including any Updates, improvements, modifications, copies, and derivative works of the foregoing. Any software which is distributed or otherwise provided to Customer hereunder (including without limitation any software identified on an Order Form) shall be deemed a part of the “Services” and subject to all of the terms and conditions of this Agreement. No rights or licenses are granted except as expressly and unambiguously set forth in this Agreement. Nothing in this Agreement will impair ChartHop’s right to develop, acquire, license, market, promote or distribute products, software or technologies that perform the same or similar functions as, or otherwise compete with any products, software, or technologies that Customer may

develop, produce, market, or distribute.

7. CONFIDENTIALITY

Each party (the “Receiving Party”) understands that the other party (the “Disclosing Party”) may disclose business, technical or financial information that is designated in writing as confidential, or is disclosed in a manner that a reasonable person would understand to be confidential (“Proprietary Information”). Proprietary Information of ChartHop includes non-public information regarding features, functionality, and performance of the Service, and the Documentation. Proprietary Information of Customer includes Customer Data (as defined below). The Receiving Party agrees: (i) to take commercially reasonable precautions to protect Disclosing Party’s Proprietary Information, (ii) except as requested by Customer (including to those integration partners chosen by Customer, if any) or as otherwise permitted herein, not to disclose the Disclosing Party’s Proprietary Information to any third party other than the Receiving Party’s employees, consultants or subcontractors on a need-to-know basis and subject to confidentiality obligations at least as protective of the Disclosing Party’s Proprietary Information as those imposed herein, (iii) except in performance of the Services or as otherwise permitted herein, not to use any of Disclosing Party’s Proprietary Information, (iv) promptly notify the Disclosing Party upon discovery of any unauthorized use or disclosure of Disclosing Party’s Proprietary Information, reasonably assist the Disclosing Party to prevent further unauthorized use or disclosure, and provide the Disclosing Party with information about the incident as the Disclosing Party may reasonably request in writing, and (v) upon the Disclosing Party’s written request, at the Receiving Party’s option, either destroy or return the Disclosing Party’s Proprietary Information to the Disclosing Party, provided the Receiving Party may retain copies of the Disclosing Party’s Proprietary Information disclosed or derived hereunder in order to comply with applicable law, rule, or regulation or pursuant to internal document retention policies. “Proprietary Information” shall not include any information that (a) is or becomes generally available to the public, (b) was in the Receiving Party’s possession or known by the Receiving Party prior to receipt from the Disclosing Party, (c) was rightfully disclosed to the Receiving Party without known restriction by a third party, or (d) was independently developed without use of any Proprietary Information of the Disclosing Party. Nothing set forth in this Agreement will prevent the Receiving Party from complying with any law, rule, regulation, court order or other legal requirement that compels disclosure of any Proprietary Information. ChartHop reserves the right to use

Customer's name as a reference for marketing or promotional purposes on ChartHop's website and in other communication with existing or potential ChartHop customers without the prior consent of Customer.

8. FEES; PAYMENT

Customer shall pay ChartHop fees for the Service as set forth in each Order Form ("Fees"). All invoices issued under this Agreement are payable in U.S. dollars within the number of calendar days as specified by the Payment Term (as set forth in the applicable Order Form) from date of invoice. Past due invoices are subject to interest on any outstanding balance of the lesser of 1.5% per month or the maximum amount permitted by law. Customer shall be responsible for all taxes associated with Service (excluding taxes based on ChartHop's net income). All Fees paid are non-refundable and are not subject to set-off.

9. RESTRICTIONS

Except as expressly set forth in this Agreement, Customer shall not (and shall not permit any third party to), directly or indirectly: (i) reverse engineer, decompile, disassemble, or otherwise attempt to discover the source code, object code, or underlying structure, ideas, or algorithms of the Service (except to the extent applicable laws specifically prohibit such restriction), (ii) modify, translate, or create derivative works based on the Service, (iii) copy, rent, lease, distribute, pledge, assign, or otherwise transfer or encumber rights to the Service, (iv) use the Service for the benefit of a third party, (v) remove or otherwise alter any proprietary notices or labels from the Service or any portion thereof, (vi) use the Service to build an application or product that is competitive with any ChartHop product or service, (vii) interfere or attempt to interfere with the proper working of the Service or any activities conducted on the Service, (viii) bypass any measures ChartHop may use to prevent or restrict access to the Service (or other accounts, computer systems or networks connected to the Service), or (ix) use the Services for timesharing or service bureau purposes or otherwise for the benefit of a third party. Customer is responsible for all of Customer's activity in connection with the Service, including but not limited to the use and distribution of login credentials by the Customer's employees or agents and uploading Customer Data (as defined below) onto the Service.

Customer represents, covenants, and warrants that Customer shall (i) use the Service in compliance with all applicable local, state, national and foreign laws, treaties, and regulations , and all compulsory industry self-regulations, whether now existing or

hereafter enacted, including without limitation those related to advertising, data privacy, international communications, export and the transmission of technical or personal data, state licensing, tax reporting, UDAAP and other laws related to unfair or deceptive acts or practices, the Federal USA PATRIOT Act, the Payment Card Industry Data Security Standard Requirements, the Federal Gramm-Leach-Bliley Act, Federal Telephone Consumer Protection Act, the Federal CAN-SPAM Act, and the EU General Data Protection Regulation, as they may be amended from time to time, and (ii) not use the Service in a manner that violates any third-party intellectual property, contractual or other proprietary rights.

10. CUSTOMER DATA

For purposes of this Agreement, "Customer Data" shall mean any data, information or other material provided, uploaded, or submitted by Customer, its employees or agents to the Service in the course of using the Service. Customer shall retain all right, title, and interest in and to the Customer Data, including all intellectual property rights therein. Customer, not ChartHop, shall have sole responsibility for the accuracy, quality, integrity, legality, reliability, appropriateness, and intellectual property ownership or right to use of all Customer Data. Customer represents and warrants to ChartHop that Customer owns all rights, title, and interest in and to the Customer Data, or that Customer has otherwise secured all necessary rights and consents in the Customer Data as may be necessary to permit the access, use and distribution thereof as contemplated by this Agreement, including all rights and consents necessary under any applicable privacy laws for ChartHop to process consumer Personal Data in accordance with this Agreement. "Personal Data" means any information that identifies or relates to a particular individual and also includes information referred to as "personally identifiable information" or "personal information" under applicable data privacy laws, rules or regulations. ChartHop shall use commercially reasonable efforts to maintain the security and integrity of the Service and the Customer Data, including through the mechanisms and procedures described in the ChartHop Security Statement available at **https://docs.charthop.com/security-statement** (as may be updated from time to time). ChartHop is not responsible to Customer for unauthorized access to Customer Data or the unauthorized use of the Service unless such access is due to ChartHop's gross negligence or willful misconduct. Customer is responsible for the use of the Service by any person to whom Customer has given access to the Service, even if Customer did not authorize such use. Customer agrees and acknowledges that Customer Data may be irretrievably deleted if Customer's

account is ninety (90) days or more delinquent. Notwithstanding anything to the contrary, Customer acknowledges and agrees that ChartHop may (i) internally use and modify (but not disclose) Customer Data for the purposes of (A) providing the Service to Customer, and (B) generating Aggregated Anonymous Data (as defined below), and (ii) freely use and make available Aggregated Anonymous Data for ChartHop's business purposes (including without limitation, for purposes of improving, testing, operating, promoting and marketing ChartHop's products and services). "Aggregated Anonymous Data" means data submitted to, collected by, or generated by ChartHop in connection with Customer's use of the Service, but only in aggregate, anonymized form which can in no way be linked specifically to Customer or any individuals. ChartHop shall own any Aggregated Anonymous Data. ChartHop shall maintain all Customer Data for six (6) months following termination or expiration of this Agreement to enable the Customer to reference such Customer Data. The Parties will each comply with applicable portions of the Data Protection Addendum available at **https://docs.charthop.com/data-processing-addendum**

11. THIRD PARTY SERVICES

    Customer acknowledges and agrees that the Services have the ability to operate with or use application programming interfaces (APIs) and/or other services operated or provided by third parties ("Third Party Services"). ChartHop is not responsible for the operation of any Third-Party Services nor the availability or operation of the Services to the extent such availability and operation is dependent upon Third Party Services. Customer is solely responsible for procuring any and all rights necessary for it to access Third Party Services and for complying with any applicable terms or conditions thereof. ChartHop does not make any representations or warranties with respect to Third Party Services or any third-party providers. Any exchange of data or other interaction between Customer and a third-party provider is solely between Customer and such third-party provider and is governed by such third party's terms and conditions and privacy policies.

12. TERM; TERMINATION

    This Agreement shall commence upon the start date set forth in the first Order Form, and, unless earlier terminated in accordance herewith, shall last until ninety (90) days following the expiration of all Order Form Terms. For each Order Form, the "Order Form Term" shall consist of the Initial Term and any subsequent Renewal Terms as set forth in that Order Form. In the event of a material breach of this Agreement by either

party, the non-breaching party may terminate this Agreement by providing written notice to the breaching party, provided that the breaching party does not materially cure such breach within thirty (30) days of receipt of such notice. Without limiting the foregoing, ChartHop may suspend or limit Customer's access to or use of the Service if (i) Customer's account is more than sixty (60) days past due, or (ii) Customer's use of the Service results in (or is reasonably likely to result in) damage to or material degradation of the Service which interferes with ChartHop's ability to provide access to the Service to other customers; provided that in the case of subsection (ii): (a) ChartHop shall use reasonable good faith efforts to work with Customer to resolve or mitigate the damage or degradation in order to resolve the issue without resorting to suspension or limitation, (b) prior to any such suspension or limitation, ChartHop shall use commercially reasonable efforts to provide notice to Customer describing the nature of the damage or degradation, and (c) ChartHop shall reinstate Customer's use of or access to the Service, as applicable, if Customer remediates the issue within thirty (30) days of receipt of such notice. All provisions of this Agreement which by their nature should survive termination shall survive termination, including, without limitation, accrued payment obligations, ownership provisions, warranty disclaimers, indemnity, and limitations of liability.

13. INDEMNIFICATION

a. Customer: Customer shall defend, indemnify, and hold harmless ChartHop, its affiliates and each of its and its affiliates' employees, contractors, officers, directors, suppliers and representatives from all liabilities, claims, and expenses paid or payable to an unaffiliated third party (including reasonable attorneys' fees) ("Losses"), that arise from or relate to the Customer Data or Customer's use of the Service.

b. ChartHop: ChartHop shall defend, indemnify, and hold harmless Customer, its affiliates and each of its and its affiliates' employees, contractors, officers, directors, suppliers, and representatives from all Losses that arise from or relate to claims that the Service infringes, violates, or misappropriates any third-party intellectual property or proprietary right. The foregoing obligations of ChartHop do not apply with respect to the Service or any information, technology, materials or data (or any portions or components of the foregoing) to the extent (i) not created or provided by ChartHop (including without limitation any Customer Data), (ii) made in whole or in part in accordance to Customer specifications, (iii) modified after delivery by ChartHop, (iv) combined with other products, processes or materials not provided by ChartHop (where the alleged Losses arise from or relate to such combination), (v) where

Customer continues allegedly infringing activity after being notified thereof or after being informed of modifications that would have avoided the alleged infringement, or (vi) Customer's use of the Service is not strictly in accordance herewith.
c. Procedure: Each indemnitor's indemnification obligations hereunder shall be conditioned upon the indemnitee providing the indemnitor with: (i) prompt written notice of any claim (provided that a failure to provide such notice shall only relieve the indemnitor of its indemnity obligations if the indemnitor is materially prejudiced by such failure), (ii) the option to assume sole control over the defense and settlement of any claim (provided that the Indemnitee may participate in such defense and settlement at its own expense), and (iii) reasonable information and assistance in connection with such defense and settlement (at the Indemnitor's expense).

14. REPRESENTATIONS AND WARRANTIES

Each party represents and warrants that (a) it is a duly organized and validly existing under the laws of the jurisdiction in which it is organized, (b) it has full power and authority to enter into this Agreement and to perform its obligations hereunder, (c) this Agreement is legally binding upon it and enforceable in accordance with its terms, and (d) the execution, delivery and performance of this Agreement does not and will not conflict with any agreement, instrument, judgment or understanding, oral or written, to which it is a party or by which it may be bound.

15. DISCLAIMER

EXCEPT AS EXPRESSLY SET FORTH HEREIN, THE SERVICE IS PROVIDED "AS IS" AND "AS AVAILABLE" AND ARE WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF TITLE, NON-INFRINGEMENT, MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AND ANY WARRANTIES IMPLIED BY ANY COURSE OF PERFORMANCE, USAGE OF TRADE, OR COURSE OF DEALING, ALL OF WHICH ARE EXPRESSLY DISCLAIMED.

16. LIMITATION OF LIABILITY

IN NO EVENT SHALL CHARTHOP, NOR ITS DIRECTORS, EMPLOYEES, AGENTS, PARTNERS, SUPPLIERS OR CONTENT PROVIDERS, OFFICERS OR REPRESENTATIVES BE LIABLE UNDER CONTRACT, TORT, STRICT LIABILITY, NEGLIGENCE OR ANY OTHER LEGAL OR EQUITABLE THEORY WITH RESPECT TO THE SUBJECT MATTER OF THIS AGREEMENT (I) FOR ANY LOST PROFITS, DATA LOSS, COST OF

PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES (HOWEVER ARISING), OR SPECIAL, INDIRECT, INCIDENTAL, PUNITIVE, OR CONSEQUENTIAL DAMAGES OF ANY KIND WHATSOEVER, OR (II) FOR ANY DIRECT DAMAGES IN EXCESS OF (IN THE AGGREGATE) THE FEES PAID AND/OR PAYABLE BY CUSTOMER TO CHARTHOP HEREUNDER IN THE TWELVE (12) MONTHS PRIOR TO THE EVENT GIVING RISE TO A CLAIM HEREUNDER.

17. ARBITRATION AGREEMENT.

Please read the following ARBITRATION AGREEMENT carefully because it requires Customer to arbitrate certain disputes and claims with ChartHop and limits the manner in which Customer can seek relief from ChartHop. Both Customer and ChartHop acknowledge and agree that for the purposes of any dispute arising out of or relating to the subject matter of this Agreement, ChartHop's officers, directors, employees and independent contractors ("Personnel") are third-party beneficiaries of this Agreement, and that upon Customer's acceptance of this Agreement, Personnel will have the right (and will be deemed to have accepted the right) to enforce this Agreement against Customer as the third-party beneficiary hereof.

a. Arbitration Rules; Applicability of Arbitration Agreement. The parties shall use their best efforts to settle any dispute, claim, question, or disagreement arising out of or relating to the subject matter of this Agreement directly through good-faith negotiations, which shall be a precondition to either party initiating arbitration. If such negotiations do not resolve the dispute, it shall be finally settled by binding arbitration in New York County, New York. The arbitration will proceed in the English language, in accordance with the JAMS Streamlined Arbitration Rules and Procedures (the "Rules") then in effect, by one commercial arbitrator with substantial experience in resolving intellectual property and commercial contract disputes. The arbitrator shall be selected from the appropriate list of JAMS arbitrators in accordance with such Rules. Judgment upon the award rendered by such arbitrator may be entered in any court of competent jurisdiction.

b. Infringement. Notwithstanding the foregoing obligation to arbitrate disputes, each party shall have the right to pursue injunctive or other equitable relief at any time, from any court of competent jurisdiction, to prevent the actual or threatened infringement, misappropriation or violation of a party's copyrights, trademarks, trade secrets, patents or other intellectual property rights.

c. Waiver of Jury Trial. CUSTOMER AND CHARTHOP WAIVE ANY CONSTITUTIONAL AND STATUTORY RIGHTS TO GO TO COURT AND HAVE A TRIAL IN FRONT OF A

JUDGE OR JURY. Customer and ChartHop are instead choosing to have claims and disputes resolved by arbitration. Arbitration procedures are typically more limited, more efficient, and less costly than rules applicable in court and are subject to very limited review by a court. In any litigation between Customer and ChartHop over whether to vacate or enforce an arbitration award, CUSTOMER AND CHARTHOP WAIVE ALL RIGHTS TO A JURY TRIAL, and elect instead to have the dispute be resolved by a judge.

d. Waiver of Class or Consolidated Actions. ALL CLAIMS AND DISPUTES WITHIN THE SCOPE OF THIS ARBITRATION AGREEMENT MUST BE ARBITRATED OR LITIGATED ON AN INDIVIDUAL BASIS AND NOT ON A CLASS BASIS. CLAIMS OF MORE THAN ONE CUSTOMER OR USER CANNOT BE ARBITRATED OR LITIGATED JOINTLY OR CONSOLIDATED WITH THOSE OF ANY OTHER CUSTOMER OR USER. If however, this waiver of class or consolidated actions is deemed invalid or unenforceable, neither Customer nor ChartHop is entitled to arbitration; instead all claims and disputes will be resolved in a court as set forth in (e) below.

e. Exclusive Venue. In any circumstances where the foregoing arbitration agreement permits either Customer or ChartHop to litigate any dispute arising out of or relating to the subject matter of this Agreement in court, then the foregoing arbitration agreement will not apply to either party, and both Customer and ChartHop agree that any judicial proceeding will be brought in the state or federal courts located in, respectively, New York County, New York, or the federal district in which that county falls.

f. Severability. If the prohibition against class actions and other claims brought on behalf of third parties contained above is found to be unenforceable, then all of the preceding language in this Arbitration Agreement section will be null and void. This arbitration agreement will survive the termination of your relationship with ChartHop.

18. MISCELLANEOUS

This Agreement represents the entire agreement between Customer and ChartHop with respect to the subject matter hereof and supersedes all prior or contemporaneous communications and proposals (whether oral, written, or electronic) between Customer and ChartHop with respect thereto. In the event of a conflict between these Terms and an Order Form, these Terms shall control unless otherwise expressly agreed upon by Customer and ChartHop in the applicable Order Form through language that references these Terms and communicates the parties' intent to modify one or more specific provisions of these Terms with respect to such Order Form. The Agreement shall be governed by and construed in accordance with the

laws of the State of New York excluding its conflicts of law rules. All notices under this Agreement shall be in writing and shall be deemed to have been duly given when received. Notices must be sent to the contacts for each party set forth on the Order Form. Either party may update its address set forth in an Order Form by giving notice in accordance with this section. Except as otherwise provided herein, this Agreement may be amended only by a writing executed by both parties. Except for payment obligations, neither party shall be liable for any failure to perform its obligations hereunder where such failure results from any cause beyond such party's reasonable control, including, without limitation, the elements; fire; flood; severe weather; earthquake; vandalism; accidents; sabotage; power failure; denial of service attacks or similar attacks; Internet failure; acts of God and the public enemy; acts of war; acts of terrorism; riots; civil or public disturbances; strikes lock-outs or labor disruptions; any laws, orders, rules, regulations, acts or restraints of any government or governmental body or authority, civil or military, including the orders and judgments of courts. Neither party may assign any of its rights or obligations hereunder without the other party's consent; provided that (i) either party may assign all of its rights and obligations hereunder without such consent to a successor-in-interest in connection with a sale of substantially all of such party's business relating to this Agreement, and (ii) ChartHop may utilize subcontractors in the performance of its obligations hereunder. No agency, partnership, joint venture, or employment relationship is created as a result of this Agreement and neither party has any authority of any kind to bind the other in any respect. In any action or proceeding to enforce rights under this Agreement, the prevailing party shall be entitled to recover costs and attorneys' fees. If any provision of this Agreement is held to be unenforceable for any reason, such provision shall be reformed only to the extent necessary to make it enforceable. The failure of either party to act with respect to a breach of this Agreement by the other party shall not constitute a waiver and shall not limit such party's rights with respect to such breach or any subsequent breaches. Customer agrees that the parties may undertake certain transactions contemplated by this Agreement via electronic signatures. Customer agrees that by executing any documents with an electronic signature, Customer is creating a legally valid and enforceable signature just as if the relevant document was signed by Customer in hardcopy.

10.3. ChartHop Basic Agreement

The following is intended for anyone interested in ChartHop's Basic package, which provides access to the Org Chart, Employee Directory, and more. The Agreement outlines general terms such as associated fees, service updates, and customer data. By signing up for ChartHop Basic, you have agreed to the terms and conditions outlined in this document.All other ChartHop packages (e.g., Standard, Premium) are covered by an Order Form and associated Terms & Conditions which supersede the statements and documentation below.

charthop-basic-agreement.pdf

10.4. Data Processing Addendum

The Data Processing Addendum outlines the rights and obligations of each party concerning the protection of personal data. The Addendum outlines ChartHop's accordance with GDPR, and outlines the company's strict privacy regulations for processing customer data.

2026 ChartHop - Data Processing Agree...

10.5. Mobile App Management

Sign up for our **privacy notifications mailing list** to keep up to date with changes.

ChartHop Mobile App Users

I'm using ChartHop Basic and want to delete my account.

We're sorry to see you go! You can delete your Basic account by following these steps:

1. Send an email with your termination request to our support team at **support@charthop.com.**

I am an Authized User in a company using ChartHop and want to delete our company account.

It's been great having you with us! To delete your company account, please refer to your contract for termination steps.

I am an employee of a company using ChartHop and want to delete my account.

Please **click here** for information on managing your account in ChartHop.

10.6. AI Usage Policy

This policy outlines the guidelines for the use of Artificial Intelligence (AI) within the ChartHop platform. We are committed to transparency and responsible AI practices.

Purpose

This document aims to clarify how AI is integrated into our platform, its intended uses, and the measures we take to ensure ethical and reliable functionality.

AI Features

1. **Text Summaries:** When text responses are gathered via forms or surveys, the quantity of results can be challenging to sort through. Text summaries scan through the text responses and highlight trends and themes.
2. **Analysis and Insight:** In various views across ChartHop, information is collected and displayed in paragraphs, snippets, charts, and graphs. Additionally, these elements often connect to larger stores of information not seen on the page itself. To help the user achieve the best analysis of the information and gain insight into patterns and trends, AI is used to synthesize and summarize a response.
3. **Chat Based Responses:** An AI powered chatbot named Ask ChartHop is available in some ChartHop products to answer open ended questions from users. The AI powered service auto navigates to various pages, including dashboards, profiles, Resource pages, tables, and Data Sheets, to locate information that could help answer the query. When Ask ChartHop senses that it has found all the information related to a satisfactory answer, it rests on that page and generates an answer within the chat window.
4. **Generative AI:** In some workflows, AI can be activated to create the proposal itself. For instance, using ChartHop AI to create a Headcount Plan Scenario based on prompts and parameters.
5. **Natural Language Filtering:** In some views in the ChartHop platform, the user has the opportunity to create a filter to curate the results. In addition to the UI query builder and the query language CQL, ChartHop AI provides the user a way to use a natural

language format to set the type of filter they desire. The ChartHop platform will then convert the results into a CQL format to create the filter.

Data Handling

We prioritize the security and privacy of your organization's data.

1. All data used by AI is handled in accordance with our **privacy policy**.
2. We do not share or sell user data to third parties for AI training.
3. ChartHop AI only has access to the data that the user's role has access to.

How ChartHop AI Works

ChartHop AI follows the process below to achieve results and protect user and organizational data.

1. A dedicated AI LLM from **Anthropic** is used within the ChartHop platform.
2. The AI results and responses are optimized via curated prompts and ChartHop platform specifics, including the ChartHop Query Language, CQL.
3. When a user initiates an AI response or analysis, the LLM is provided the same access to organizational data that is available to that user. All of the limitations of fields and information that is gated for that user, are also applied to the AI initiated on that user's behalf.
4. Every AI session instantiates a new instance of the AI model. No data is retained between sessions.
5. No AI session data from one user is leveraged by another session initiated by another user.
6. The results provided to the user synthesized by ChartHop AI are never used for training a shared LLM across other ChartHop accounts.
7. The results provided to the user synthesized by ChartHop AI are never shared, sold, or shared externally to the LLM or any other third party.

Ethical Considerations

We are dedicated to ethical AI development and deployment. Anthropic shares these desires and the base model is trained as such, more information on Anthropic's policies can be found at **trust.anthropic.com**.

1. We strive to mitigate bias in AI algorithms to ensure fair outcomes.
2. Regular audits are conducted to assess the performance and fairness of AI features.
3. Users can provide feedback on AI outputs to help improve accuracy and fairness.

User Control

Users have control over AI-driven features.

1. Organization's can choose to enable AI functionalities in ChartHop.
2. Users can choose to engage with AI functionalities.
3. Transparency is provided regarding when and how AI is being used.

Updates and Changes

This policy may be updated periodically to reflect changes in AI technology and practices. Users will be notified of significant updates.

Contact

For any questions or concerns regarding our AI usage policy, please contact us at **support@charthop.com**.

10.7. Security statement

> Sign up for our **privacy notifications mailing list** to keep up to date with changes.

ChartHop's mission is to organize your people data. As part of that mission, protecting your sensitive data is one of our core values. You are entrusting us with sensitive data about your most critical resource, and we do our best to earn that trust.

This document describes the mechanisms and procedures we use to keep your data safe.

1. Infrastructure

1. ChartHop is hosted on Amazon Web Services (AWS), in us-east-1 (Virginia datacenter), in a Virtual Private Cloud (VPC) in EC2 (Elastic Compute Cloud).
2. All application servers are on private IP addresses and are not exposed on the public internet.
3. All servers are configured from the official hardened AlamaLinux, using automated configuration management software (Ansible) that ensures consistency across the infrastructure. Security patches are automatically applied multiple times a week.
4. All servers use AWS Security Group firewall rules to minimally restrict ingress.
5. A bastion host is used as the only point of SSH ingress.
6. Access to the bastion host is secured via SSH key (no password logins).
7. Access to the bastion host is firewalled such that only specifically whitelisted IP addresses can SSH to the port.
8. All servers use IAM EC2 roles and fine-grained least-privilege-access custom IAM policies to access AWS resources.
9. Administrative access to the AWS account is only permitted via Single Sign-On, which leverages multi-factor authentication including either a physical hardware token or biometric, to a limited number of ChartHop employees.
10. Credentials are encrypted using AWS Key Management Service, and the keys are rotated yearly. For information about AWS's physical security and procedures, please refer to their Compliance page at: **https://aws.amazon.com/compliance/**

2. Data Storage

1. ChartHop's production data is stored using MongoDB Atlas, MongoDB's hosted database service.
2. Data storage is multi-tenant within ChartHop, but ChartHop does not share data storage resources with any other company. All data is tagged by customer organization id at every level, throughout the lifecycle. The primary Atlas servers are also hosted in us-east-1 and use peering, such that the appservers communicate privately with Atlas within the VPC.
3. In addition to the fact that normal communication is within the VPC, the appservers only communicate with the database servers using TLS/SSL.
4. The production databases are firewalled such that only the appservers can communicate with them.
5. The production databases use authentication with strong passwords; these credentials are encrypted using AWS Key Management Service.
6. All data in the database is stored encrypted-at-rest on encrypted volumes.
7. MongoDB Atlas provides point-in-time backup restore capabilities, and the backups are retained for a period of one year.
8. Administrative access to the MongoDB Atlas console is only permitted via Single Sign-On, which leverages multi-factor authentication including either a physical hardware token or biometric, to a limited number of ChartHop employees.
9. For more information about MongoDB's security capabilities, please refer to their Security Controls white paper at: **https://webassets.mongodb.com/_com_assets/collateral/Atlas_Security_Controls.pdf**

3. Other Key Vendors

1. ChartHop uses Datadog for centralized logging of the platform. Our customers' sensitive data is stripped from the logs, and access to Datadog is restricted to multi-factor authenticated users with a business need to access logs. Information about Datadog's security compliance procedures is available here: **https://www.datadoghq.com/security/**
2. ChartHop uses Google's G Suite product for corporate data storage and email. All ChartHop employees and contractors are required to use multi-factor authentication

including either a physical hardware token or biometric. Information about Google's security compliance procedures is available here: **https://gsuite.google.com/security/**

3. ChartHop uses GitHub for private code repositories. All ChartHop employees and contractors are mandated to use multi-factor authentication, including either a physical hardware token or biometric, and under no circumstances are private keys of any kind checked into the repositories. Information about GitHub's security compliance procedures is available here: **https://help.github.com/articles/github-security/**
4. ChartHop uses Slack for internal communication and system monitoring. Information about Slack's security compliance procedures is available here: **https://slack.com/security**

4. Application Security

1. TLS/SSL is mandatory for all web requests made to ChartHop. Amazon's Certificate Management service manages certificates, which are automatically rotated yearly.
2. ChartHop's appservers use Jetty and JAX-RS, expose a minimum surface area, and apply regular security patches.
3. The appservers use Amazon's Web Application Firewall rules to block known bot attackers.
4. SQL injection attacks are not possible, as ChartHop does not use an SQL database. That said, all user input is sanitized, including using OWASP's HTML sanitization libraries.
5. ChartHop supports and strongly encourages the use of Single Sign-On rather than passworded logins and supports SAML, Google Workspace, and other methods. As a best practice, we further recommend that our customers use multi-factor authentication.
6. Our Single Sign-On does not provide automatic access to anyone with a customer-domain email; they must still have an authorized ChartHop user account.
7. For those customers who are not using SSO, strong passwords are required for user accounts.
8. Passwords are one-way hashed using bcrypt and are not recoverable; they can only be reset.

9. Authentication requests are protected against brute-force attacks; they are limited to 5 failed attempts before the account is disabled.

5. Customer Security Controls

1. ChartHop treats all data as confidential to each customer, but has additional controls around data designated “Sensitive”. This category of data includes:
    - Employee Compensation
    - Future Hires and Departures (not yet announced)
    - Voluntary / Involuntary status of Departures
    - Birth Year and Ethnicity
    - Employee Home Email, Phone Number, and Home Address
    - Private Scenarios, Comments, and Notes
    - Custom fields that can be designated Sensitive at your option.
2. ChartHop provides several user access levels which allow customers to control which of their users have access to Sensitive data. These levels currently include:
    - Owner (allows setting user privileges and enabling integrations)
    - Technical Owner (allows configuring integrations without direct access to sensitive data)
    - People Ops Admin (allows making official changes to primary org chart)
    - Sensitive View (allows viewing all employees’ sensitive data)
    - All Compensation View (allows viewing compensation, but not other sensitive data)
    - Cash Compensation View (allows viewing cash, but not equity compensation)
    - Equity Compensation View (allows viewing equity, but not cash compensation)
    - Personal Contact View (allows viewing personal contact information)
    - Time Off View (allows viewing time off information)
    - Recruiting Editor (allows making official changes to open roles only)
    - Recruiting View (allows viewing sensitive data of open roles only)
    - Member View (allows viewing employees who report into the user)
    - Limited View (no sensitive data visible)

3. ChartHop allows restricting of the above access by department or team, or by customer-defined rules.
4. All users are allowed to create Scenarios (proposals for changes to the org chart), but only Primary Editors or Owners are allowed to “merge”, or approve/finalize, those changes.
5. Therefore, ChartHop’s recommendation is that, depending on the organization:
    - No more than 1-3 people receive Owner access
    - If needed, a very limited number of IT staff receive Technical Owner access
    - No more than a small number of people receive Primary Editor access
    - Sensitive View is only offered to individuals who have a business need to view sensitive information across the whole organization (for example, senior members of the executive team, or HR / Finance / Strategy roles)
    - Some members of the recruiting team receive Recruiting View or Recruiting Editor access
    - Most members of the organization, including department heads, receive Member View access
    - Limited View is offered to low-level members of the organization or consultants / contractors / temps.
6. ChartHop provides a “View Sensitive Data” button in the user interface which can be toggled. When that button is toggled off, no sensitive data will be retrieved from the API or displayed in the user interface.
7. ChartHop's API is available for customers to use and build applications on top of, using access-scoped tokens. Access levels can be set for API applications and tokens in the same way as users.
8. All data access and changes made to data in ChartHop are logged, authenticated, and auditable.

6. Employee Access and Procedures

1. ChartHop employees and contractors sign confidentiality agreements and undergo annual security training.
2. ChartHop employees and contractors are all required to use multi-factor authentication, including either a physical hardware token or biometric.

3. ChartHop laptops and mobile devices are configured to wipe remotely if they are misplaced.
4. ChartHop customer-facing staff are only granted access to accounts that they directly interface with.
5. Many ChartHop engineers do not receive access to the production environment or data. They work strictly off of development or demo accounts.
6. Some ChartHop engineers have access to the production environment in the course of their duties. Such access is strictly controlled and periodically audited.
7. ChartHop engineers are issued credentials and keys specific to that engineer with minimal access required for that engineer's duties. These keys are revoked upon offboarding.
8. ChartHop maintains strict separation of the production data and environment from local and development environments.

7. Data Sharing

1. ChartHop does not share your data with third parties except at your explicit request.
2. For example, we offer integrations that synchronize your data with other authenticated systems. Those integrations can only be enabled by a ChartHop customer with Owner or Technical Owner access, and the list of enabled integrations is visible on the Apps and Integrations page. We will not synchronize with any external service that you do not explicitly turn on.
3. Similarly, ChartHop offers an API, which you can make use of, given appropriate access controls, to share ChartHop data with your other internal systems.
4. To the extent we can, ChartHop offers you data portability - via API and export. You can leave and take your data with you.
5. Upon termination, ChartHop will retain your data a period of up to one year, after which it will all be irrevocably hard-deleted and cannot be recovered. If you wish your data to be irrevocably deleted immediately upon termination, notify us and we will do so.
6. ChartHop plans to offer anonymous, aggregated network insights to our members, such as industry benchmarks.
    - When ChartHop offers this service, (1) no information attributable to an individual, or an individual company, will ever be shared and (2) you will be notified, and will

receive the option to opt out of inclusion in aggregation.

8. Breach Notification

1. If ChartHop becomes aware of a data breach, we will notify our affected customers as soon as we have an understanding of the extent of the breach, but in any case no later than within 72 hours.
2. ChartHop follows postmortem procedures in the event of any security or system failures and will publish and distribute postmortems to our customers.

10.8. Subprocessors

> Sign up for our **privacy notifications mailing list** to keep up to date with changes.

ChartHop relies on a number of vendor subprocessors to provide the service, some of whom may receive access to our customer data.

We evaluate these vendors for their reliability and adherence to strong security and privacy practices, and do our best to minimize sensitive data that is sent to these vendors, depending on their business need.

For transparency, here are the vendors we use, with their business purpose. This list will be updated whenever we add or remove subprocessors. If you have questions about any of our subprocessors, please email us at **privacy@charthop.com**.

Infrastructure subprocessors

These vendors are used throughout ChartHop:

Vendor	Primary Purpose
Google, Inc.	Email, data storage, and tracking analytics
Amazon Web Services, Inc.	Core infrastructure and backup
MongoDB, Inc.	Database storage and backup
Datadog, Inc.	Centralized logging, system monitoring, and metrics
Slack, Inc.	System monitoring and internal communications
Stripe, Inc.	Payment and invoice processing
Functional Software, Inc. dba Sentry	Web app error reporting
Zendesk, Inc.	Support tickets
Delighted, Inc.	Customer surveys
Salesforce.com, Inc.	Customer contact information
Clubhouse Software, Inc. dba Shortcut	Support tickets

Integration subprocessors

The below vendors are supported via integrations that may be configured in your specific ChartHop setup. Any integrations that are installed will be visible to Owners on the **Apps and Integrations** settings page in ChartHop.

Subject to the configuration settings you have established, information including personal data may be sent to these subprocessors.

Vendor	Primary Purpose
Automatic Data Processing, Inc.	Payroll and human resources information
SAP America, Inc.	Payroll and human resources information
Paylocity, Inc.	Payroll and human resources information
JustWorks, Inc.	Payroll and human resources information
Greenhouse, Inc.	Applicant tracking

10.9. FAQ

Welcome to the FAQ! Please let us know if you cannot find what you are looking for.

Privacy

Q: Why can I see data for some individuals and not others?

A: If any sensitive information is selected in **Select Columns,** you will only see sensitive data for individuals who report under you and directly under you.

If you have the access level to see all sensitive views and still cannot view the data, ensure the eye icon at the top right of the platform is enabled to **visible**. If the eye icon is enabled to **hidden** (slash through eye icon), it prevents sensitive data from being viewed if sharing your screen with others.

People management

Q: How can I set a backfill for an open role?

A: ChartHop enables your recruiting team to be proactive, not reactive when handling backfills. If there is an anticipated departure of an employee and your team wants to start recruiting, here's how to:

1. Find the employee on either the **Org Chart** or the **Data Sheet**
2. Click **Backfill**
   *If the rest of the organization should not know of an anticipated departure, set the recruiting sensitivity to **Highly Sensitive**. This will ensure that only recruiters with sensitive access are aware that this role is actively being recruited for.*

Data sheet

Q: Can I export data from the Data Sheet?

A: Yes! When clicking the export icon above the Select Columns button on the right side of the platform. You can export via CSV or export a URL to sync with Google Sheets.

Q: How can I bulk edit fields in the Data Sheet?

A: To bulk edit built-in or custom fields, bulk select by clicking and dragging, or hold down command and select the people for whom you know the values are the same. Then click *bulk edit*. The fields will be under the *custom fields* section of the bulk edit pop up. You may need to first enable the *edit dialog* option in the custom field **setting**.

Q: How can I filter data in the Data Sheet?

A: If you only want to see employees who match a specific filter, click the Filter button and select an attribute from the dropdown menu. Enter the value of the attribute you wish to filter in the Data Sheet. Or you can input direct filters in the open text field. For syntax, please see our documentation on Filtering.

Maps

Q: Is the map embeddable as an iframe?

A: No, unfortunately the map is not currently embeddable as an iframe.

Scenarios

Q: How can I export a scenario?

A: When clicking **Actions...** near your profile icon in the top right-hand corner of the platform, you'll have the option to export the scenario as a CSV or as a Powerpoint.

Q: What if my scenario is finalized / approved?

A: Users with "Primary Editor" permissions can approve your scenario and merge your scenario to primary. After a scenario is merged, its changes are "official", are made public to the organization, and if applicable, are synced to downstream systems of record.

Q: How is Annual Cost calculated in scenarios?

A: Annual Cost will reflect the total annualized cost of changes made, including new jobs added, adjustments to compensation, and jobs removed (departures without backfill).

11. Labs

11.1. Notion

Using the Notion App in ChartHop

The Notion app connects your Notion workspace to ChartHop so the information your team keeps in Notion is available alongside your people data. This guide covers how to connect Notion, how the app behaves once connected, and what to know if you want to build your own Notion app instead of using ChartHop's.

1. Choose a connection type

You can connect Notion to ChartHop in two ways. Pick the one that matches how your organization uses Notion.

Individual user connection

Each person authorizes ChartHop against their own Notion account. ChartHop respects the access level that a user already has in Notion: if you can't see a page in Notion, you won't see it through ChartHop either. Use this option when access to Notion content varies from person to person and you want those permissions enforced.

Shared organization connection

One connection is set up for the whole organization, scoped to the Notion content your team has agreed to share. This makes shared information (team wikis, process docs, org-wide pages) available in ChartHop without provisioning a Notion seat or connection for

every user. Use this option when you want broad access to shared content without managing individual authorizations.

> **Which should you pick?** If your Notion permissions matter (sensitive pages, restricted teamspaces), use individual user connections. If you mainly want company-wide content accessible to everyone in ChartHop, use the shared organization connection.

2. Installing the app

Go to Apps, Bundles and Agents → Apps → Other available apps and open Notion. Click **install** to start the process.

Provide your OAuth credentials

Field	Required	Notes
Client ID	Yes	From your Notion integration settings.
Client secret	Yes	From your Notion integration settings. Store it only in the app definition; never share it elsewhere.
Token URL	Yes, always	From your Notion integration settings. This is the endpoint ChartHop uses to exchange and refresh tokens.
Authorization URL	During user authorization only	From your Notion integration settings. Used to send the user through Notion's consent flow.

> **Tip:** The token URL and authorization URL serve different steps. Authorization happens once per user; token exchange happens on an ongoing basis. Only the token URL is permanent in your app definition.

3. How the app is configured

Configuration for this app is defined on the app level:

- **Authentication:** how the app authenticates against Notion (OAuth credentials and token exchange)

- **Retries and rate limiting:** how the app handles Notion's API limits and transient failures, so requests are retried automatically and you stay within Notion's rate limits without manual intervention
- **Available operations:** the set of actions the app can perform (for example, reading pages, querying databases, searching content)
- **Pagination:** how the app pages through large result sets from Notion so complete data is returned even when Notion responds in batches
- **Entity mapping:** what each operation means on the ChartHop side, in other words, how Notion objects (pages, databases, users) map back to ChartHop entities

You don't need to configure any of this to use ChartHop's built-in Notion app; it's already defined.

11.2. Alpha Apps and Integrations

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

We're introducing the **Alpha Apps & Integrations** page to give you early access to new features and integrations designed to improve your experience and enhance how your data works in ChartHop.

By enabling this page, you'll get a sneak peek at what we're building—and a chance to help shape the future of the platform.

How to Enable Alpha Access

Please reach out to your CSM or our **support team** to unlock the **Alpha Apps & Integrations** page.

What to Expect

Features in this section are:

- **In early development**: You may encounter bugs or incomplete functionality.
- **Evolving rapidly**: Features may change, be renamed, or temporarily disappear.
- **Not yet supported**: These are not covered by standard support.

How to Give Feedback

We *want* your thoughts! There are a few ways you can send us your feedback:

- Share feedback directly with your customer success manager.

- Email our **support team** with the subject line: “Alpha Feedback: [Feature Name]”.

Disabling Alpha Access

You can turn off access at any time by returning to **Settings** > **Labs** and toggling **Alpha Apps & Integrations** to **off**. This will hide alpha features from your interface.

FAQ

Q: Are Alpha features available to all users?
A: Access to Alpha features depends on your ChartHop plan—you’ll see the applications and integrations that are included with your current package.

Q: Will Alpha features become GA?
A: Many do—but we can’t guarantee a timeline or final inclusion. Once a feature is moved to beta or GA, you can untoggle Alpha apps if you want and you'll have access to that app under its corresponding tab.

11.3. ADP Outbound Payroll Sync

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

ChartHop now allows you to sync certain fields from ChartHop back to ADP. This allows you to make ChartHop your source of truth for employee date while keeping ADP up to date.

The sync can run on a scheduled basis or immediately after changes take place.

Install and purchase ADP Data connector

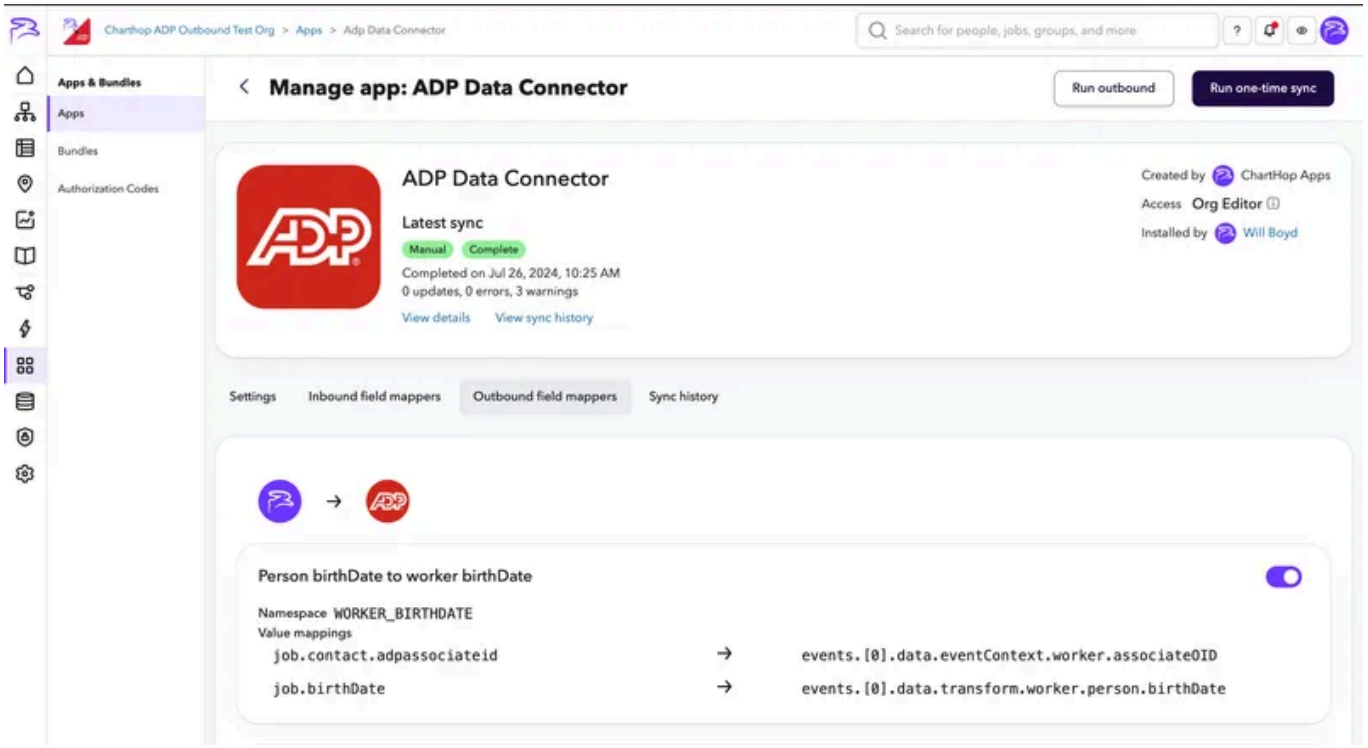
To configure the field mapping for Outbound fields:

Configure Outbound field mappers

To configure the field mapping for Outbound fields:

1. From the left sidebar select **Apps & Bundles**
2. Select the **ADP Date Connector App** if you have already installed it.
3. Select the **Outbound Field Mapper** tab
4. Toggle on or off any field mappers for the built in fields that you would like to setup.

If you would like to map custom fields, please contact the ChartHop team at this time.



Activating the Outbound Sync

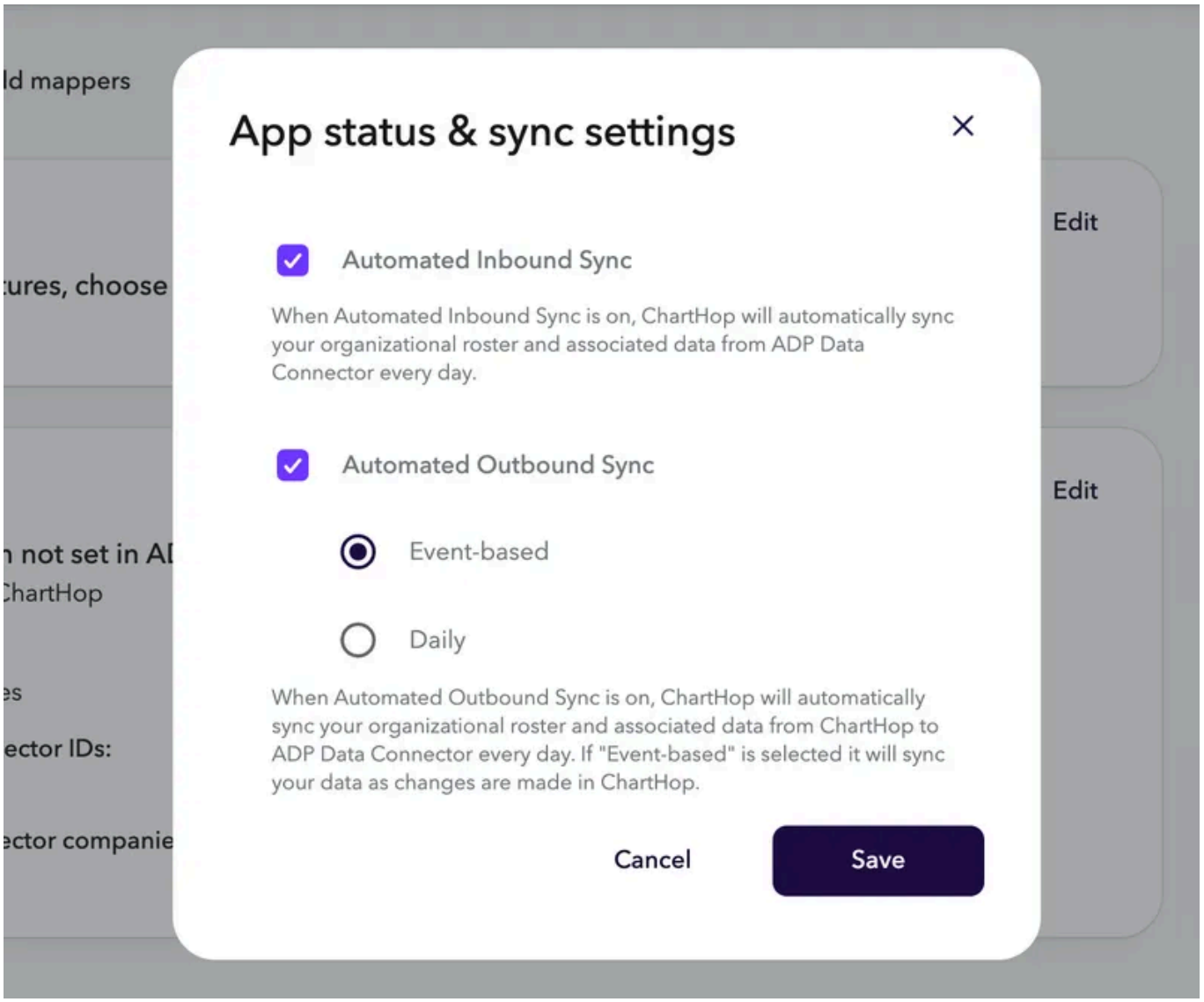
To activate the outbound sync:

1. From the left sidebar select **Apps & Bundles**
2. Select the [ADP Date Connector App] if you have already installed it.
3. Select the **Settings** tab
4. Locate the **App status & sync settings** card on the right hand side & select **Edit**.
5. Check the **Automated Outbound Sync** checkbox
6. Select if you want an **Event-based** or **Daily Sync.**
7. Press **Save**.

Sync type options

Event-based Sync - Will run every time a change is made in ChartHop. For example: If an employee adds their Birth Date to their profile in ChartHop, that information will automatically sync after they save it.

Daily Sync - Will run every day and update information in ADP each morning.



Current Limitations

- Access to fields depends on where it lives in ADP.
- All compensation must be in USD
- Base compensation is only supported for employees whose compensation in ChartHop is annual and whose pay schedule in ADP is monthly, semimonthly or biweekly.
- You can't make past dated changes that are different from today
    - Valid: Adam's current pay is $90, the effective date for this pay was 6 months ago, 7/1/23. Today, on 1/15/24 we give Adam a raise to $100 with the effective date of 2 weeks ago, 1/1/24.
    - Not valid: Adam's current pay is $90, the effective date for this pay was 1 week ago, 1/7/24. Today, on 1/15/24 we give Adam a raise to $100 with the effective

date of 2 weeks ago, 1/1/24. This is not a valid change because the effective date of the change is before the most recent change.

- You can't make future dated changes ahead of time, but we will make the update when the sync runs on the current date.
  - **Not valid:** Adam's current pay is $90, the effective date for this pay was 1 week ago, 1/7/24. Today, on 1/15/24 we give Adam a raise to $100 with the effective date of 2 weeks in the future, 2/1/24.
- Compensation fields can be effective dated.

Workflows

A two-way sync with ADP enables ChartHop to be your source of truth for employees, managers, and administrators.

Examples:

```
An employee is moving! They spoke with HR and now need to update their contact information. They can login to ChartHop and change it right from their profile without having to dig into ADP. Administrators can even set up actions to be notified when an employee does this if needed.

Their home address, phone number, and other personal information will be sent to ADP for payroll automatically.
```

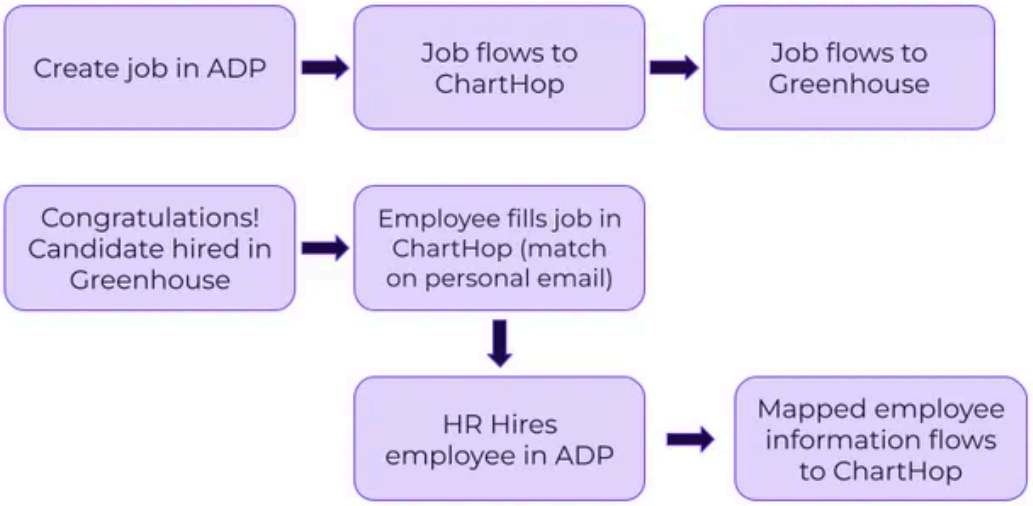
```
We successfully wrapped up our compensation cycle in ChartHop. Updated compensation will update in ADP on the effective date in to simplify payroll, no need to export or upload data.
```

```
Our permissioning relies on ChartHop groups. ChartHop syncs with Okta and ADP so we can reflect our organization structure as it is, and the information will flow to Okta and ADP for automatic access management.
```

```
We hired a new employee! Their information came in from Greenhouse, and our recruiting team can input the rest of their onboarding information in ChartHop, all data will flow to ADP for payroll.
```

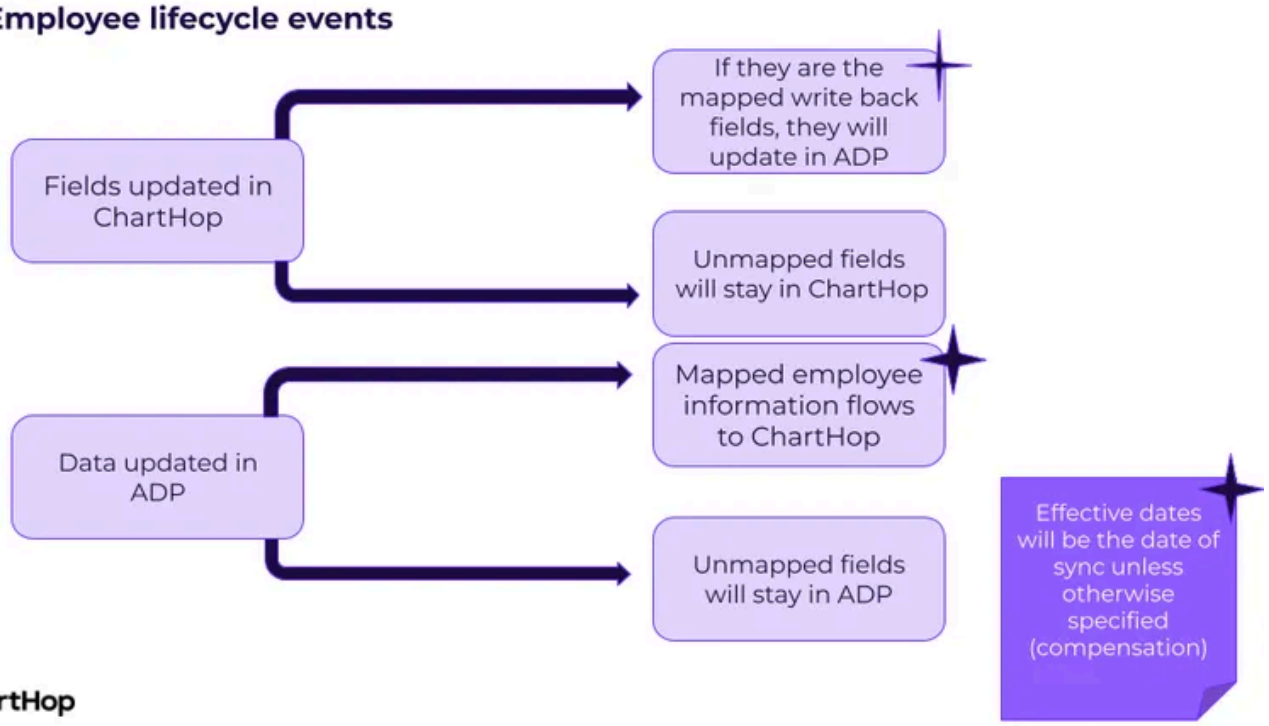
```
A manager recieved a letter of resignation. They submitted a terminate and backfill scenario, which utilized ChartHop's approval workflows. Once approved and merged, the termination information will sync to ADP to update payroll and employee records.
```

Hiring employees with ChartHop, ADP, and Greenhouse



ChartHop

Employee lifecycle events



ChartHop

11.3.1. ADP Outbound supported fields

Supported Fields

The following fields are supported. For details on the exact field names, codes and their mappings please look at the **Outbound Field Mappers** tab in the ADP Data Connector App.

Ongoing syncs/updating employees

Field	Status
Legal name	Supported
Preferred name	Supported
Home address	Supported
Birthday	Supported
Gender	Supported
Work Email Address	Supported
Work Phone number	Supported
Personal/Home Email Address	Supported
Personal Mobile Phone number	Supported
Home Phone number	Supported
Manager	Supported
Base Compensation	Supported with limitations
Title	To valid title list
Department	ADP Bug
Business Unit	Supported
EEO Establishment	Supported
Custom Fields on the worker endpoint	Supported
Set rehire eligibility, severance eligibility, reason code	Supported

In-progress hires

Field	Status
Hire date / Start date	Supported *(Required for hire)*
Legal first name	Supported *(Required for hire)*
Legal last name	Supported *(Required for hire)*
Birth date	Supported
Home address (street, city, state, postal, country)	Supported
Tax ID	Supported
Tax ID type	Supported
Tax ID status	Supported
Federal filing status	Supported
State tax jurisdiction	Supported
SUI/SDI tax jurisdiction	Supported
Worked-in-jurisdiction indicator	Supported
Pay frequency	Supported
Payroll group	Supported *(Required for hire)*
Payroll schedule group	Supported
Onboarding template code	Supported *(Required for hire)*
Onboarding status	Supported
Position ID	Supported

11.3.2. Hiring workflows with ADP

ADP Outbound Workflows

What this covers

As part of your ChartHop HRIS onboarding, you're enabling the ADP Data Connector. This allows ChartHop to automatically send approved new hires to ADP as **in-progress hires**, so your team doesn't have to re-enter data manually.

There are three things your team needs to complete before we can go live:

1. Identify and confirm the fields you want ChartHop to send to ADP
2. Validate that your Greenhouse hiring workflows connect correctly to ChartHop if applicable
3. Confirm your team understands the in-progress hire handoff in ADP

How the hire flow works

ChartHop's role is to create the in-progress hire record in ADP. ADP does not consider the hire complete until your team finishes it there.

Step 1	→	**Step 2**	→	**Step 3**	→	**Step 4 — Customer action required**
Candidate accepted ATS		New hire created in ChartHop ChartHop HRIS		ChartHop sends hire to ADP ADP Data Connector *Only triggers when all 5 required fields are populated*		Finish in-progress hire in ADP ADP Workforce Now *No fields sync to this employee until this step is done*

Two things to know before go-live

Step 3 is conditional. ChartHop will only send the hire to ADP once all five required fields are populated: **given name, family name, hire date, ADP Onboarding Template Code, and ADP Payroll Group Code**. If any of these are missing, nothing is sent. Make sure every new hire record in ChartHop has all five before expecting it to appear in ADP. *This includes any other fields you set as required on your onboarding template in ADP as well.*

Step 4 is a hard blocker for all ongoing syncs. Until your team completes the in-progress hire in ADP, **no fields will sync to that employee's ADP record** - including any updates made in ChartHop after the hire was sent. The employee is on hold in ADP until your team submits them.

Field mapping: ChartHop → ADP

You decide which fields ChartHop sends to ADP when a hire is created. Fields not included here will need to be entered manually when your team completes the in-progress hire in ADP.

How to fill this in

For each field you want ChartHop to send, provide the exact ADP field code name. If you're unsure, your ADP admin can find it under **Setup → HR → User-Defined Fields** in ADP Workforce Now. Leave it blank and we'll work through it together. Here's a list of all available fields ChartHop can send to ADP.

Fields ChartHop will send to ADP

★ **Required** - Step 3 will not trigger until all five required fields are populated.

Filling out a list of the fields you want to send to ADP is the first step in your workflows. This will ensure all of those fields are mapped and marked as required.

ChartHop field	ADP field / code name	Notes
★ **First name**	Given name	Required to send hire to ADP
★ **Last name**	Family name	Required to send hire to ADP
★ **Hire date**		Required to send hire to ADP
★ **ADP Onboarding Template Code**		Required to send hire to ADP
★ **ADP Payroll Group Code**		Required to send hire to ADP
Any additional fields that are required in your onboarding template		

Fields your team will complete manually in ADP

Anything not in the table above will need to be entered when your team finishes the in-progress hire in ADP. Document them in a separate sheet so your HR or payroll team knows what to expect.

ADP field	Who enters it	Notes
Any fields you want ADP to be the source of truth for		

The ADP in-progress hire handoff

When ChartHop sends a hire to ADP, ADP holds it as an in-progress hire until a human completes it. ChartHop does not finalize the hire in ADP - that belongs to your team.

No sync will occur for this employee until this step is complete
Until the in-progress hire is finished in ADP, **no data will sync to that employee's ADP record** - including any updates made in ChartHop after the hire was sent. The employee is on hold in ADP until your team completes and submits them. This also means they will not be set up for payroll. Completing this step promptly after each hire is sent is critical.

What your team needs to do in ADP when a hire is sent

1. Log in to **ADP Workforce Now**
2. Navigate to **People → New Hires → In Progress**
3. Locate the hire sent by ChartHop (it will appear with the name and start date ChartHop provided)
4. Review the pre-populated fields and complete any remaining required fields
5. Submit the hire to move it from in-progress to active

Define your internal process before go-live

- **Who owns the ADP in-progress hire completion step?**
- **What is your SLA for completing a hire in ADP once it's sent from ChartHop?**
- **How will the ADP owner know a hire is waiting for them?**
  Consider: a Slack notification, a ChartHop action alert, or a recurring ADP in-progress hire queue review.
- **Who is the backup owner if the primary is out?**

11.4. Ashby Integration

> This feature is currently in Beta.
>
> We're really excited about it and it's already being used by multiple organizations.
>
> Try it out and send feedback to the ChartHop team or directly to **product-feedback@charthop.com**.
>
> ### How to setup a Beta Feature
>
> 1. From the left sidebar, select **Admin,** then select **Labs**.
> 2. Use the switch to toggle on the feature, then press the **Save settings** button.
> 3. Read below for additional setup instructions and context about what will be activated when you save settings.

The Ashby integration is a two-way sync that allows for the following:

- Outbound — ChartHop to Ashby — **Open Job ➡ Opening**
  - ChartHop must be the source of truth for Open Jobs
- Inbound — Ashby to ChartHop — **Offer + Hired Candidate ➡ Person in Filled Job**

The Ashby integration is developed by the Ashby team. You can view additional documentation from them: **here**.

Setup & API Keys

This integration uses two API keys — one for each direction of the sync. During setup, you'll be asked to provide both.

ChartHop → Ashby API Key (generated by Ashby)

Ashby's setup flow will ask you to paste an API key into ChartHop. This key is generated in Ashby and authorizes ChartHop to connect to your Ashby account.

To generate this key:

1. Go to app.ashbyhq.com/admin/api/keys in Ashby.
2. Create a new API key and copy it.
3. Paste it into the field shown during the ChartHop integration setup.
4. Continue following the remaining steps in **Ashby's setup documentation**.

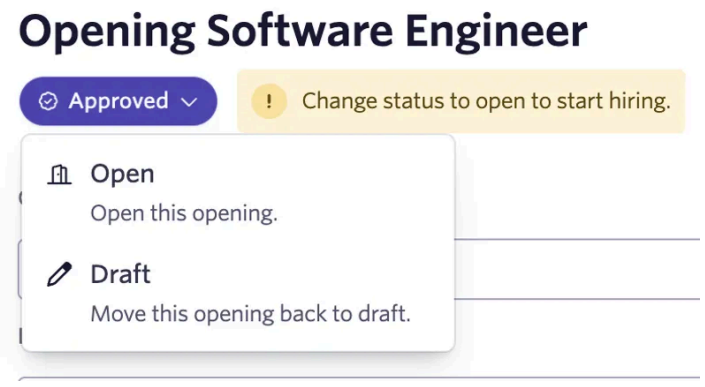
Ashby → ChartHop API Key (generated by ChartHop)

ChartHop also generates its own API key, which Ashby uses to push data back to ChartHop (e.g., hired candidates). This key is generated automatically by ChartHop during the installation flow and is provided to Ashby as part of the setup.

> ChartHop's ability to connect directly to Ashby via AI is a newer, experimental capability. If you run into any issues, please contact support.

Sync an Open Job in ChartHop to an Opening in Ashby

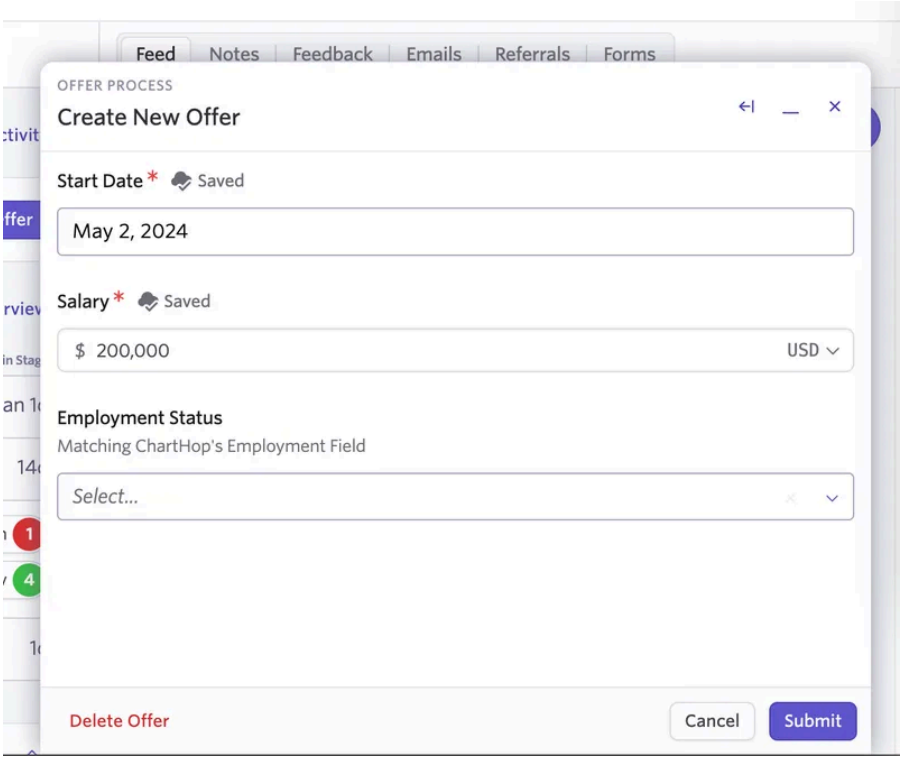
1. Mark the hiring **Recruiting Status** as `Active` in ChartHop
2. Wait for the open to sync to Ashby (The sync runs every 5 minutes)
3. Look for the Job in the list of Openings in Ashby: app.ashbyhq.com/openings
4. The job will be imported with a status of `Approved` — move it to `Open` to start hiring.



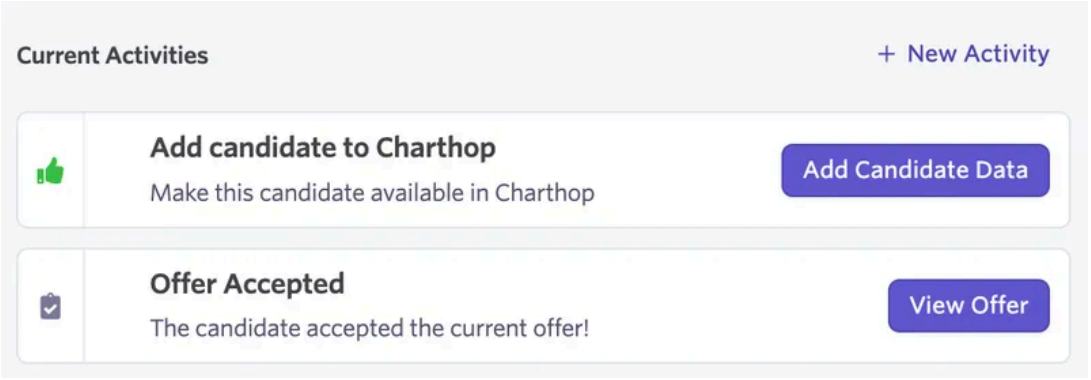
Sync an Offer in Ashby to a Person in ChartHop

1. When creating the offer, add relevant fields that will be mapped to ChartHop.
2. After the candidate has accepted the offer and been marked as `Hired` in Ashby, they can be pushed to ChartHop from Ashby.

3. Wait for the sync from Ashby (The sync runs every 5 minutes)
4. View the new hire in ChartHop.



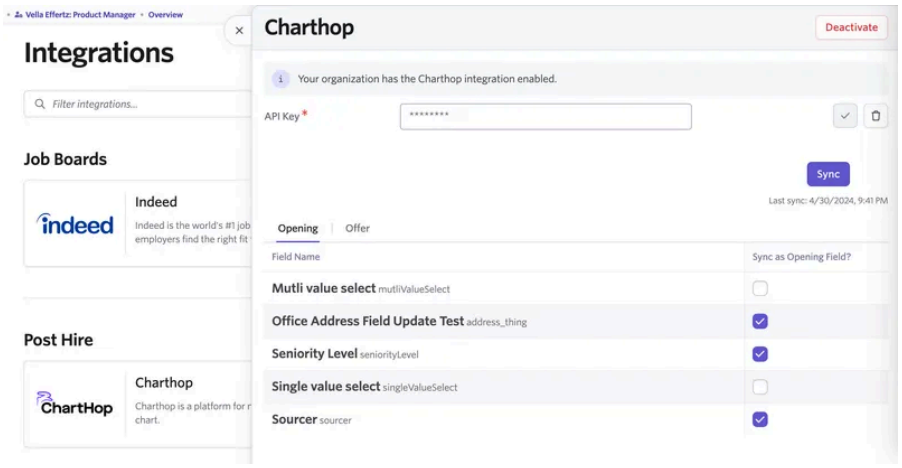
Setting ChartHop Information during offer



Adding candidate to ChartHop

Syncing details & setup

- The sync will run every 5 minutes or whenever you push the sync button
- If you want to manually initiate the sync, press the sync button in Ashby. Running the App in ChartHop will not sync the app.
- The Ashby integration can pull any field *from* ChartHop and will automatically create new fields in Ashby. Simply mark the Checkbox to sync the field.
    - Only Custom fields in ChartHop can be synced.



ChartHop App Setup in Ashby

11.5. Automated Actions

This feature is currently in Beta.

We're really excited about it and it's already being used by multiple organizations.

Try it out and send feedback to the ChartHop team or directly to product-feedback@charthop.com.

How to setup a Beta Feature

1. From the left sidebar, select **Admin,** then select **Labs**.
2. Use the switch to toggle on the feature, then press the **Save settings** button.
3. Read below for additional setup instructions and context about what will be activated when you save settings.

Overview

Automated Actions allow you to automatically send messages, forms and tasks based on time or event-based triggers.

Automated actions are highly versatile and can reduce the manual work required by your people team. It's often useful to look at some use cases from other customers, but if you have ideas for something you want to automate, just let ChartHop staff know.

Our favorite use cases

Recognition

- Sending Shoutouts to a Slack channel
- Sending Birthday or Work Anniversary notification to a Slack channel

Planning

- Notify the recruiter or a Slack channel when their job officially moves to "Active" and is ready to start recruiting.
- Notify a person's HRBP any change is made to their information.

Performance

- Automatically prompting 1:1 forms every week
- Send Peer Reviewers their forms after they are selected
- Send ad-hoc feedback to a person after they receive peer feedback

Onboarding

- Sending messages & forms to a new hire on their first day
- Introduce new hires with a message to the Slack channel whenever they submit an "About me" form
- Notify an Onboarding buddy of expectations after they've been selected
- Send tasks to a new hire's manager to prepare for their first day.

Surveys

- Send an Onboarding Survey automatically after 90 days
- Send an exit survey 3 days before the person's last day

Actions Structure

Actions consist of 2 primary elements:

- Triggers — Defines when the steps should happen
- Steps — Define what should happen when a trigger occurs.

Triggers

There are 2 types of triggers:

- **On a schedule**
  - The action steps will happen at the same time on a schedule when the filter matches.
  - Example schedules
    - 9:00 AM — Everyday
    - 12:00 PM — Every Monday, Wednesday & Friday

        - 2:00 PM — First day of every month
        - 9:00 PM — First day of first day for the months of Jan, Apr, Aug, Dec
- **When an event occurs**
    - The action steps will happen immediately after the event occures.
    - Examples:
        - Form submissions
        - Employee lifecycle events *(like hires or terminations)*
        - Job updates *(like recruiting status changes)*

Steps

There are 3 types of steps:

Send Messages

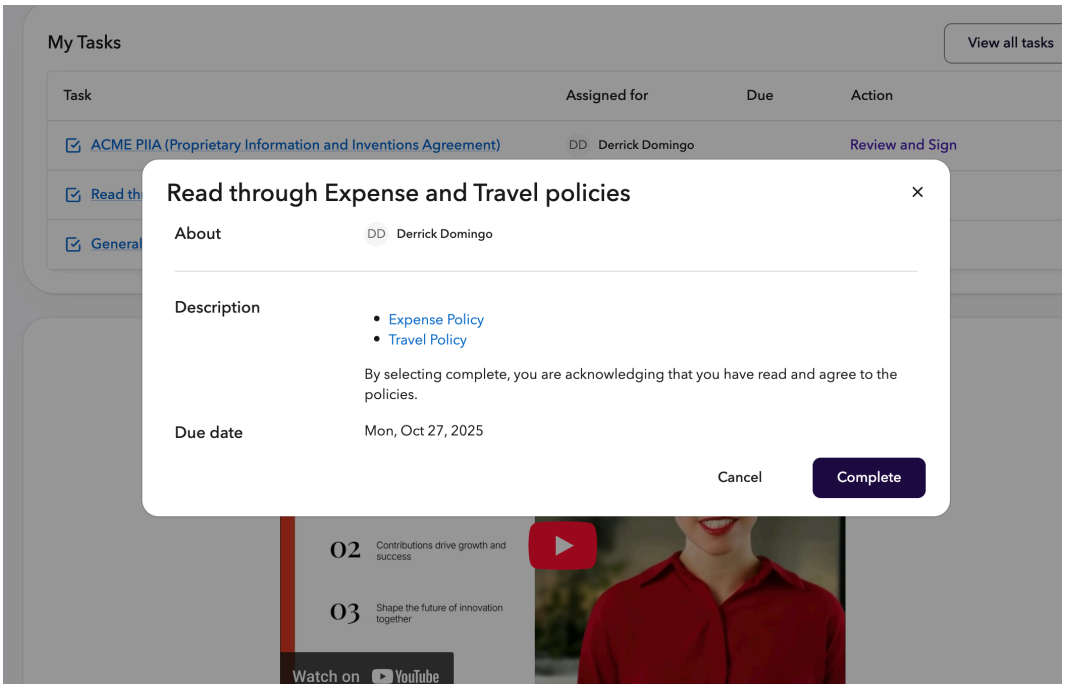
- Sends a notification via Slack or Email

Send Forms

- Sends a form with attached Tasks and notification

Send Tasks

- Sends a task that can be completed in the app
- Tasks will appear with their description in a modal



Task sent from an action

Send Documents for Signature

- See **Signatures** documentation for details.

Add Categories to Actions

Categories allow you to organize your actions and the tasks that they create.

You are able to create custom Categories, but two built in Categories: **Onboarding & Offboarding Pages** should be used to assing tasks that you would like to see appear in the Onboarding and Offboarding views.

To add a category to an action:

1. Open the action that you would like to edit
2. At the top of the action, select a category from the **Category** dropdown.
3. **Save** the action.

Linking Actions to Reviews and Surveys

Linking Actions to Reviews and Surveys allows you to specify that a certain automated action should only run if the event occurs in the context of Reviews and Survey. It also allows you to track the form sends and responses in the context of the Survey.

This is is great for use cases like:

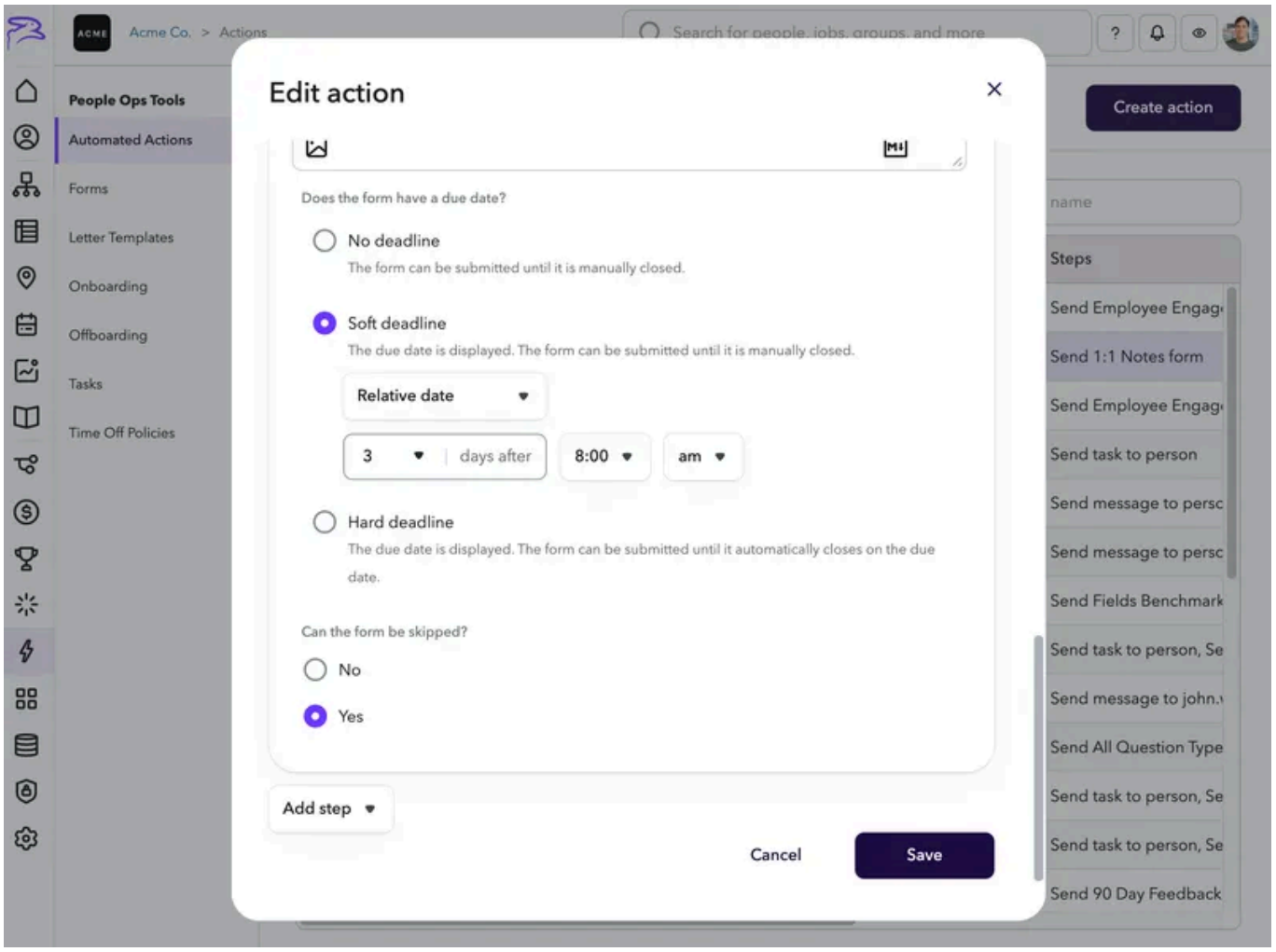
- **Reviews -** Automatically send Peer Review Form when the peer reviewer selections have been approved.
- **Reviews -** Add custom notifications when forms within a review are submitted, approved or relesed.
- **Surveys** - Set up recurring pulse surveys and view the results inside Surveys.
- **Surveys** - Aggregate triggered survey feedback

Form Configuration: Due Dates and Skip

You are able to set up forms to have Due Dates or to be Skipped if they are optional.

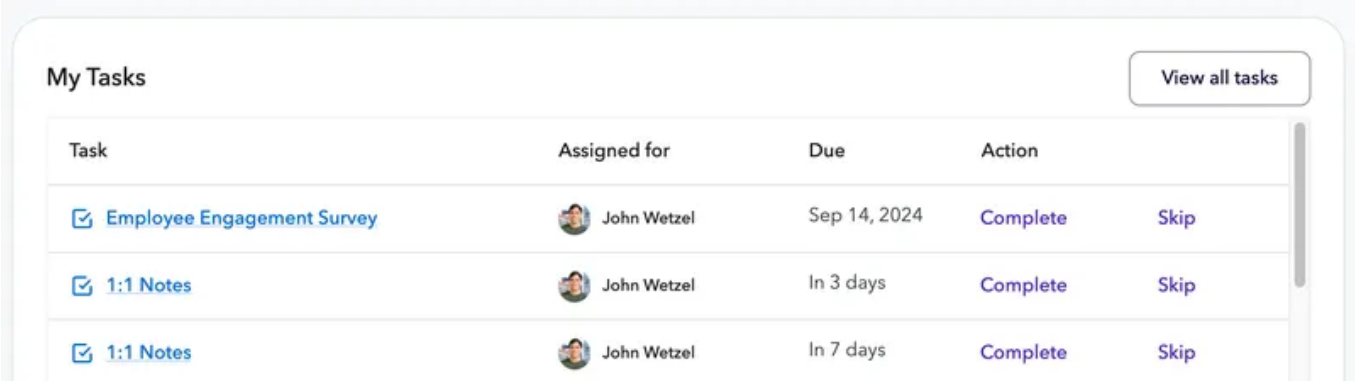
To set up Due Dates and Skipping:

1. Edit the action
2. Add a Send Form step
3. Set a due date (Read more in **Managing tasks**)
    - With Actions, you can set a Relative due date which will set the date relative to when the action is triggered. For example, 30 days after someone's start date.
4. Indicate if the form can be Skipped
    - This is great if forms are not essential, like a 1:1 form and may need to be skipped for occasions like a vacation or holiday.



Recurring Tasks for Forms Behavior

- If an action is associated with a Review or Survey, then a person can only have one *open* task at a time.
    - If a person has completed the previous instance of the form, then they will receive a task with the new due date.
    - If a person has *not* completed the previous instance of the form, then they will not receive a new task and will have the previous task with the previous due date.
- If the action is *not* associated with a Review or Survey, the action will continue to send the person tasks every time the action runs.
    - *Ex. Receive 1:1 requests for every week*



Example Task list showing skip options with due dates

11.5.1. Events in Actions

When an Action is triggered **by an event**, ChartHop makes the event's data available as variables you can use in your trigger conditions and message templates.

Understanding the structure of those variables helps you write precise conditions — especially when you only want an Action to fire when a *specific field* changed.

Event types

Every event has a type that describes what happened. Update events follow this format:

```
change.update.<entity>
```

For example:

- `change.update.hire` — a hire record was updated
- `change.update.job` — a job record was updated

You can see the event type that fired an Action in its run log.

event.before and event.update

When an update event fires, two variables give you access to the field values involved in that specific change:

Variable	What it contains
`event.before.<field>`	The value of the field *before* this update
`event.update.<field>`	The new value being written *by* this update

These variables are scoped to the specific fields touched by this event. If a field wasn't part of the update, `event.update.<field>` will be empty.

Example: Only trigger when startDate changes

Suppose you have an Action on `change.update.hire` and want it to fire only when `startDate` is modified — not when other fields like `announceDate` are updated.

Use this condition:

```
event.update.date != event.before.date
```

This checks whether the `startDate` (stored as `date` on the event) was part of this update and has a different value than before. If `startDate` wasn't touched, the condition won't match and the Action won't fire.

Tip: Print event values to debug

If you're not sure what an event contains, add a **Send Message** step that prints the before and after values. For example:

```
Before: {{event.before.date}}
After: {{event.update.date}}
```

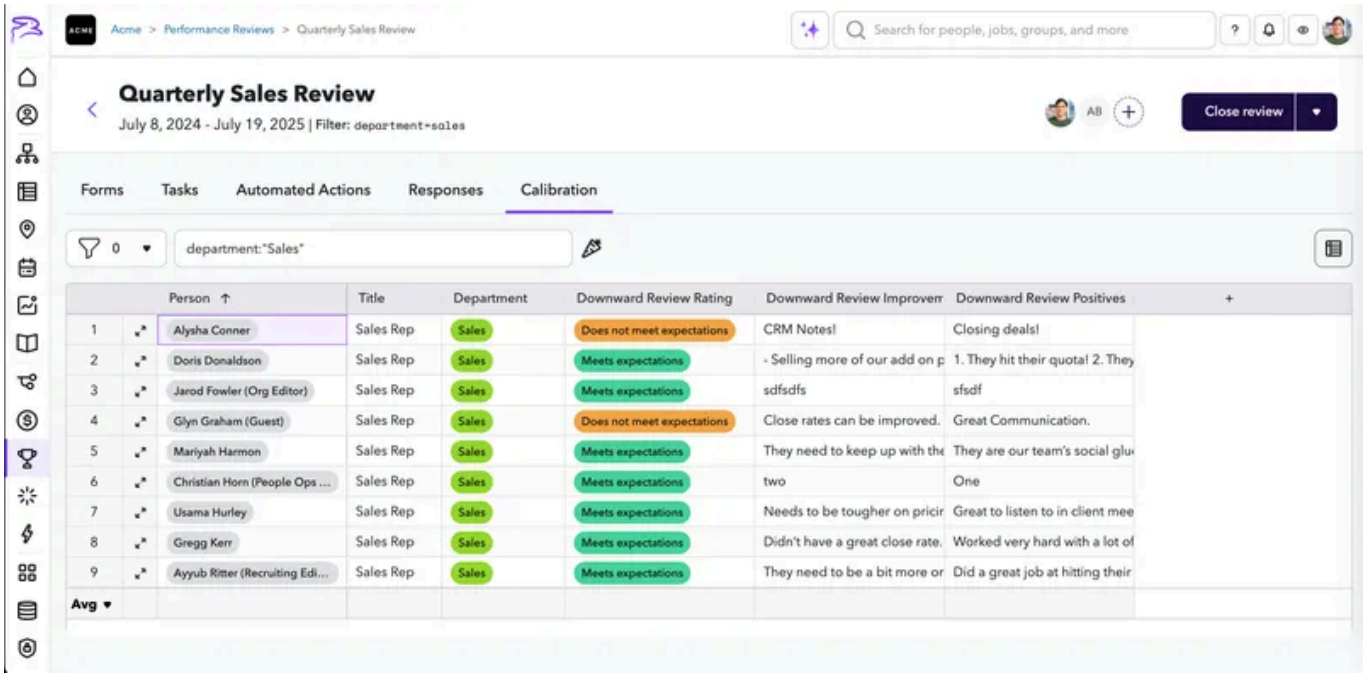
Trigger the event manually, then check the message to see exactly what values ChartHop captured. This is the fastest way to understand what's in the event before writing your condition.

11.6. Calibrations

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.



Calibration tab

This feature adds a new Admin-facing tab to Performance Reviews that allows you to conduct a calibration. This tab is visible to anyone who has access to the review.

A typical calibration workflow involves meeting with various subsets of the organization, for example the "Sales Department", to compare and calibrate ratings accross managers.

We recommend that you use the table in the calibrations tab as your primary view when running your calibrations meetings. Commonly, this will be screenshared in a video call or shared on a common display during the calibration meeting.

How to set up the calibrations table

We recommend that the admin who is running the calibration to set up the table before the meeting. Add any needed data to the sheet by adding or removing and applying filtered views for each calibration meeting.

About the data displayed in the Calibrations Sheet

The data that is displayed is a mix of ChartHop fields and data from forms submitted as part of this Review. Unlike the data sheet, **this view will pull data from the review that has not yet been released**, allowing you to run a calibration before you release the ratings and reviews.

Only people who have had a form completed about them as part of this review will be displayed in this list. If you do not see a person listed, then double check that you see a response about them in the **Form responses** sheet. If their review form has not been submitted then it will not be on the list.

Default Data Columns

- Person
- Title
- Department
- Comp band
- All single select, multi-select or numeric scale questions or fields from the forms used in a Review.
    - For example, if there is a "Self Rating" question from a self review form and a "Manager Review" question from a downward review form both of those will automatically be added with a column for each of those.
    - If there is an instance, like a peer review, where multiple people fill out the same form and questions about one person, like a "Peer Rating" then all of the values will appear in the same cell.
    - Any smart calculations or smart bucket fields that utilize fields that we updated as part of the review will utilize the new data from the review.

Additional Data Columns

- Any additional fields from ChartHop can be added such as Manager, Tenure or Last Promotion Date.

Creating views

Use the filter to create the correct subset of data for each view or meeting.

You can save the view by bookmarking it in your browser or copying the URL. The filter is stored within the URL (ex. `/calibration?filter=department%3A"Sales"`) so whenever you visit that bookmark the filter will be automatically applied.

We recommend creating all of your bookmarks or links before your meeting. Then you can simply click to load the view.

In the future, we will support the ability to save the views within ChartHop.

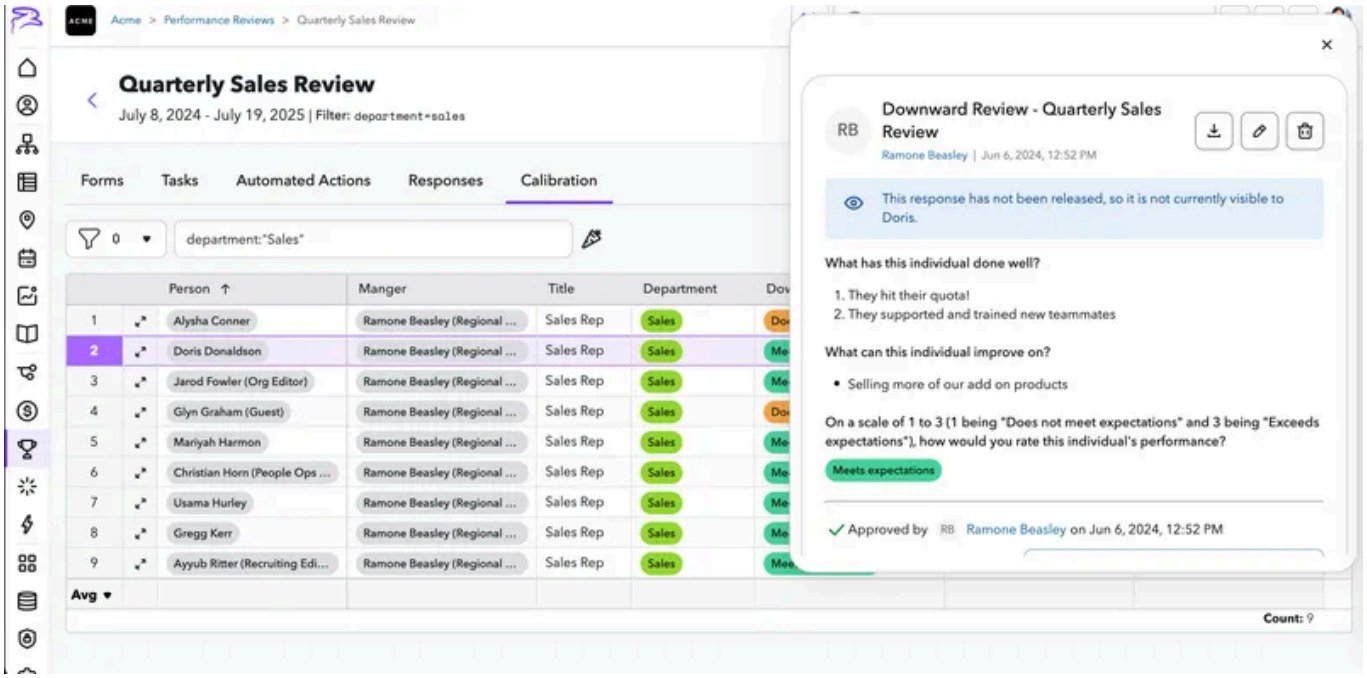
Running a calibration meeting

During your calibration meeting, as an admin, you should pull up the previously bookmarked view that aligns to the people in that meeting and share your screen.

Viewing forms within a calibration

As you discuss, you may way to drill down to look at the specific responses that were submitted as part of the review. In order to do this, you can click on the "expand" icon within a person's row.

The responses will also show if they have been approved or released. If you have access you can also approve or release directly from this view.



View responses

Updating ratings or other data during a calibration

One of the primary tasks during a calibration is the updating of a rating. In order to do this, you will need to click the "expand" icon then find the form where the rating was set.

Edit the form and update the rating or any other related data.

Note that any edits to a form will display that the form was edited by the person. If you are sensitive to this display, then please have the original submitter make the change.

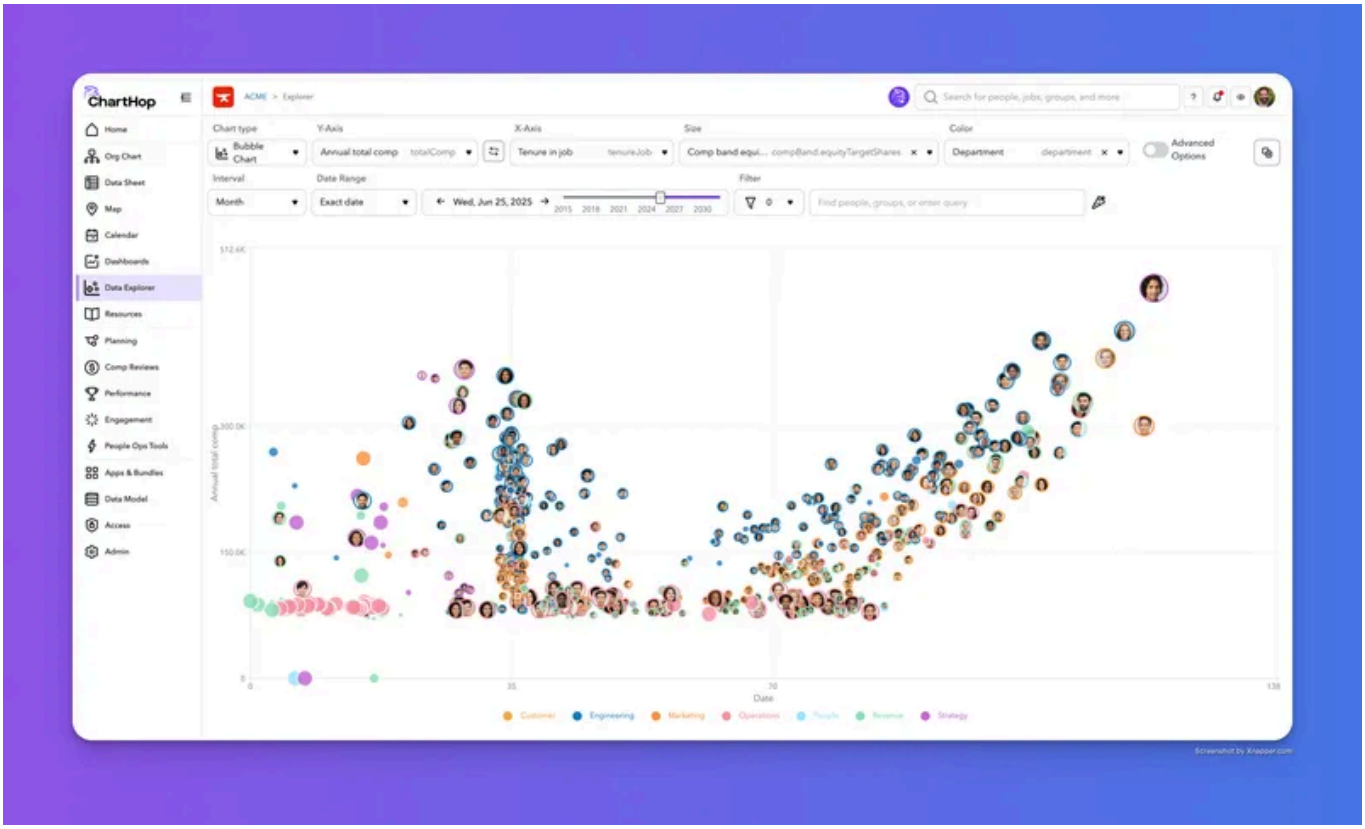
> **Modules:** HRIS | Engagement | Goals | **Performance** | Compensation Reviews | Headcount Planning

11.7. Data Explorer

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.



Bubble Chart in Data Explorer

Data Explorer

Data Explorer is a new way to explore data in ChartHop with a full screen experience and interactive options to choose fields, categories, date range, and filters. Data Explorer is a powerful way to gain insights quickly.

To access Data Explorer, first ensure that it is active in the account and the desired User is selected for access. *It is recommended to enable this for only users that have access to team or department data as Users with no direct reports and no Admin access will not find the charts very useful.* Once it is enabled, Data Explorer is found in the primary left Menu sidebar, appearing below Dashboards.

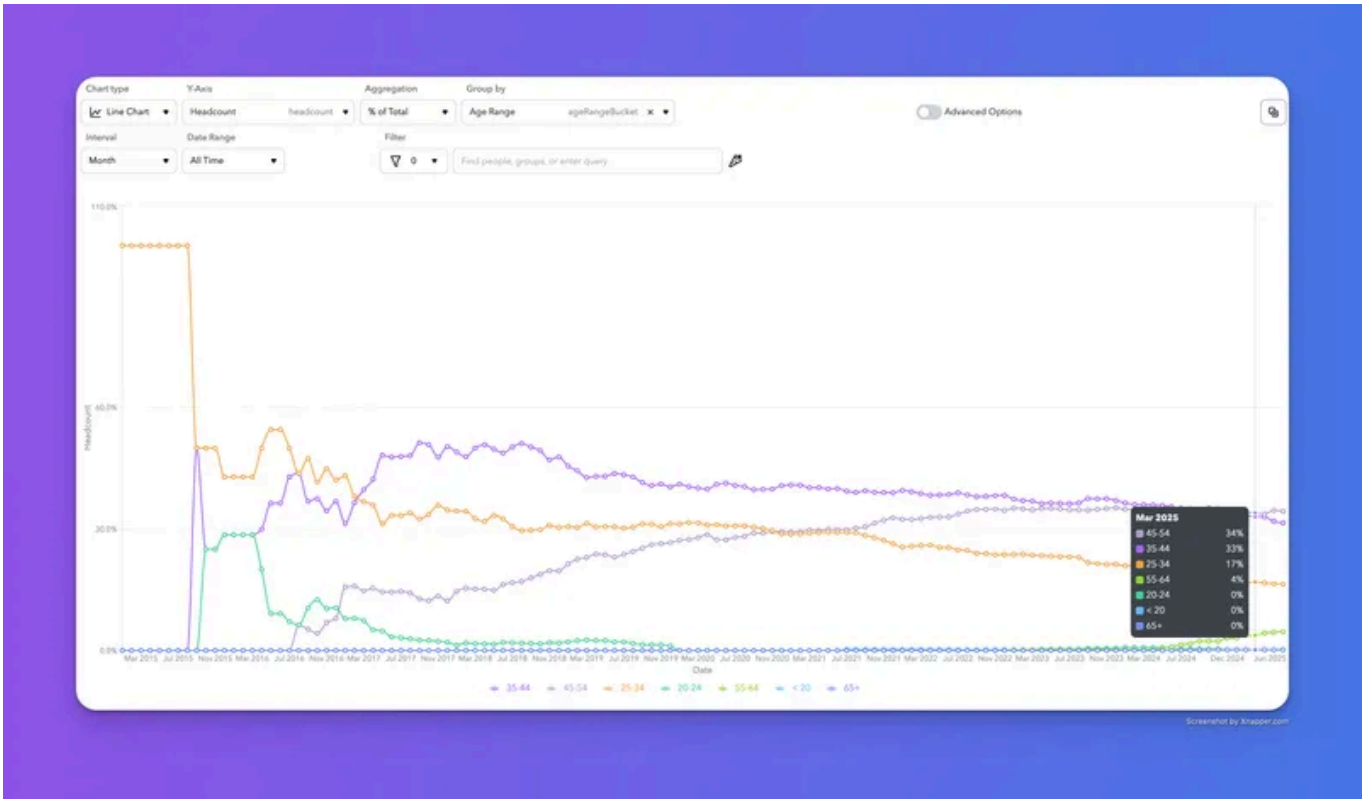
Timeseries Chart Types

Area Chart



Area charts show how values change over time, with shaded regions that help highlight trends, patterns, and cumulative totals. They're ideal for tracking growth, comparing categories, and visualizing part-to-whole relationships in your data.

Line Chart



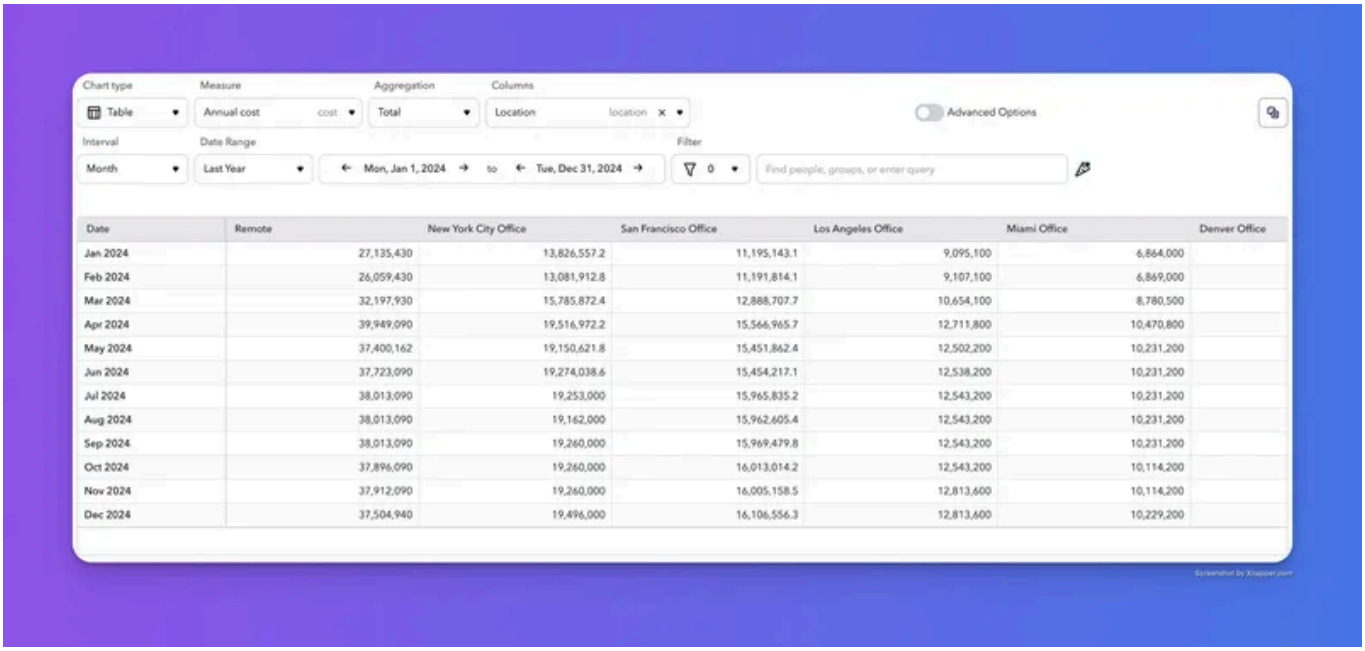
Line charts are perfect for showing trends over time. They connect data points with a continuous line, making it easy to spot changes, patterns, and comparisons across one or more metrics.

Stacked Chart



Stacked charts break down totals over time by category, letting you see both overall trends and how individual segments contribute. They're great for visualizing composition and change across multiple groups in a single view.

Table

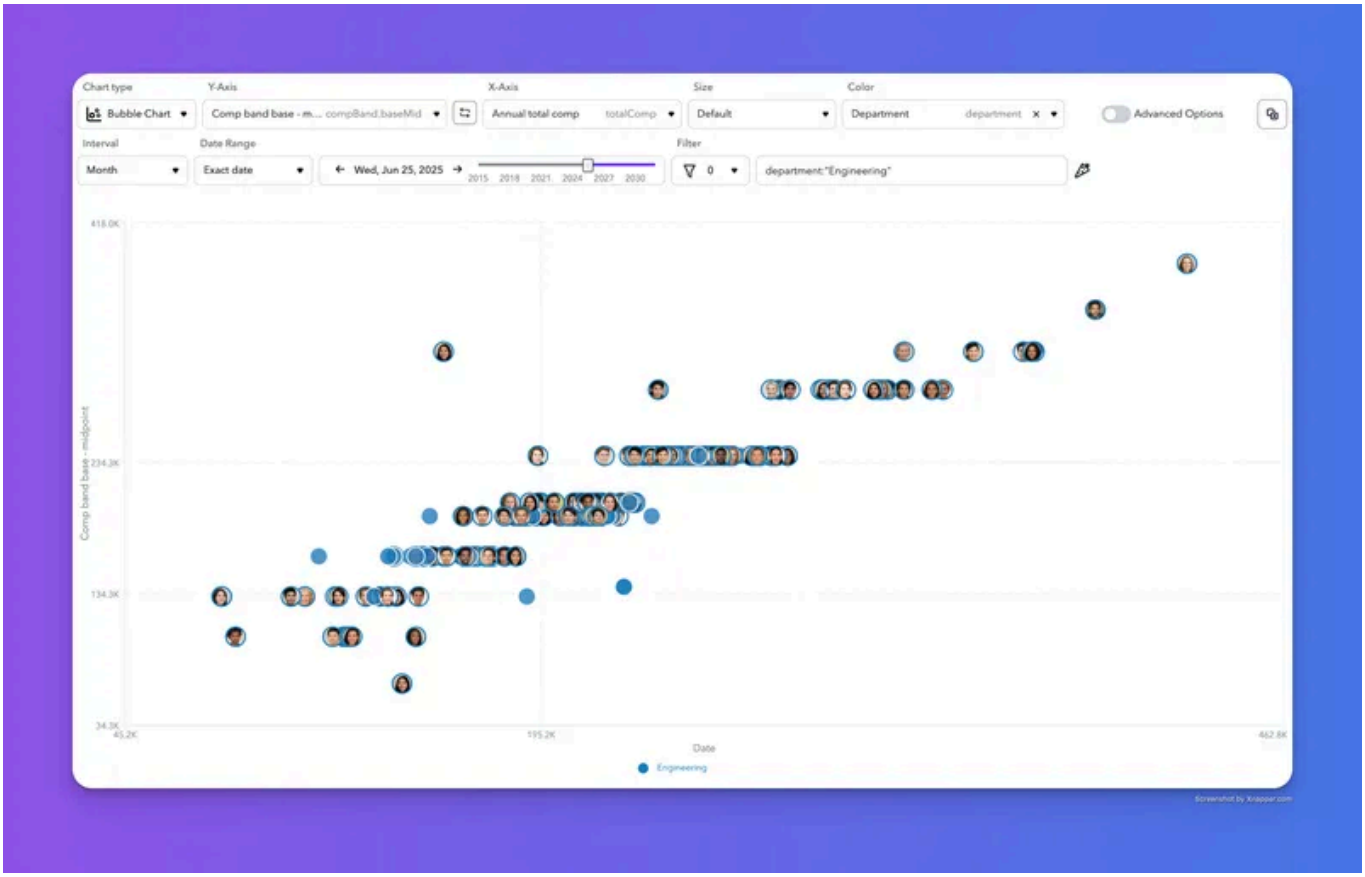


Date	Remote	New York City Office	San Francisco Office	Los Angeles Office	Miami Office	Denver Office
Jan 2024	27,135,430	13,826,557.2	11,195,143.1	9,095,100	6,864,000	
Feb 2024	26,059,430	13,081,912.8	11,191,814.1	9,107,100	6,869,000	
Mar 2024	32,197,930	15,785,872.4	12,888,707.7	10,654,100	8,780,500	
Apr 2024	39,949,090	19,516,972.2	15,566,965.7	12,711,800	10,470,800	
May 2024	37,400,162	19,150,621.8	15,451,862.4	12,502,200	10,231,200	
Jun 2024	37,723,090	19,274,038.6	15,454,217.1	12,538,200	10,231,200	
Jul 2024	38,013,090	19,253,000	15,965,835.2	12,543,200	10,231,200	
Aug 2024	38,013,090	19,162,000	15,962,605.4	12,543,200	10,231,200	
Sep 2024	38,013,090	19,260,000	15,969,479.8	12,543,200	10,231,200	
Oct 2024	37,896,090	19,260,000	16,013,014.2	12,543,200	10,114,200	
Nov 2024	37,912,090	19,260,000	16,005,158.5	12,813,600	10,114,200	
Dec 2024	37,504,940	19,496,000	16,106,556.3	12,813,600	10,229,200	

Tables present your data in a clear, structured format—ideal for viewing exact values, comparing details across rows and columns, and exporting for deeper analysis. Best used when precision matters.

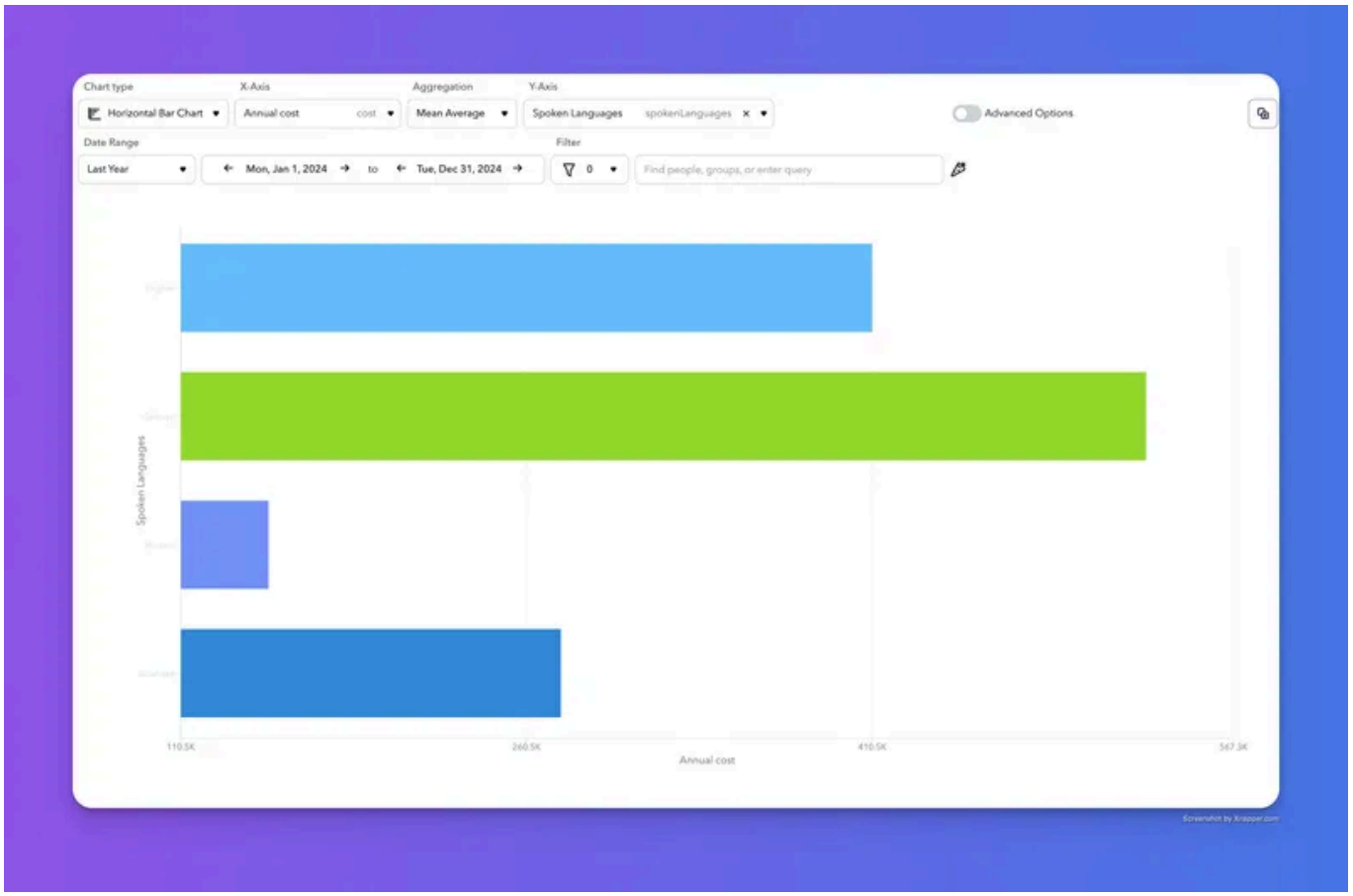
Non-Timeseries Chart Types

New! Bubble Chart



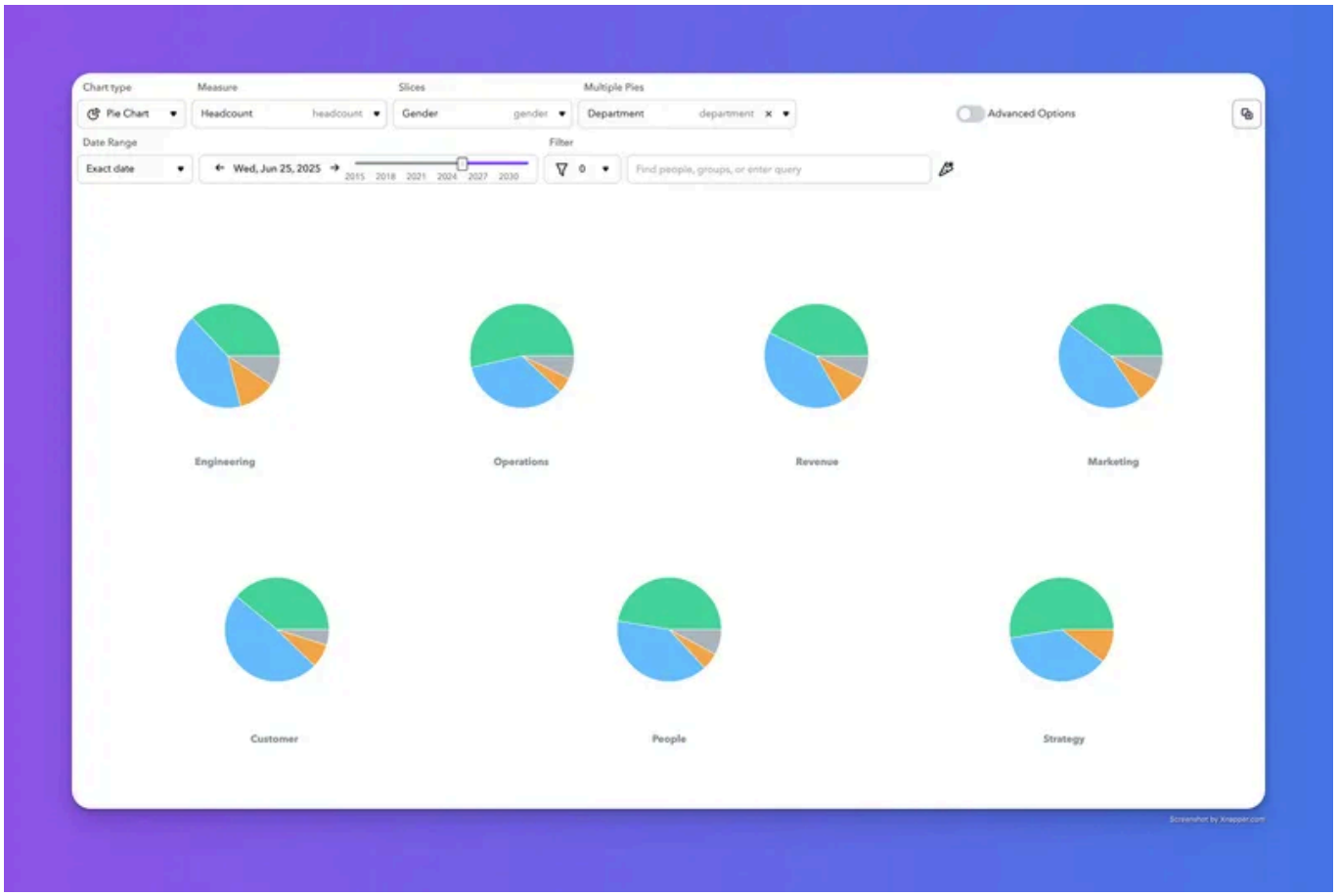
Bubble Chart is a new chart type introduced with Data Explorer. Bubble charts let you compare people across three data points at once—using the X and Y axes for two variables, and bubble size to represent a third. They're great for visualizing relationships, spotting outliers, and understanding distribution across categories enabled with the color option.

Horizontal Bar Chart



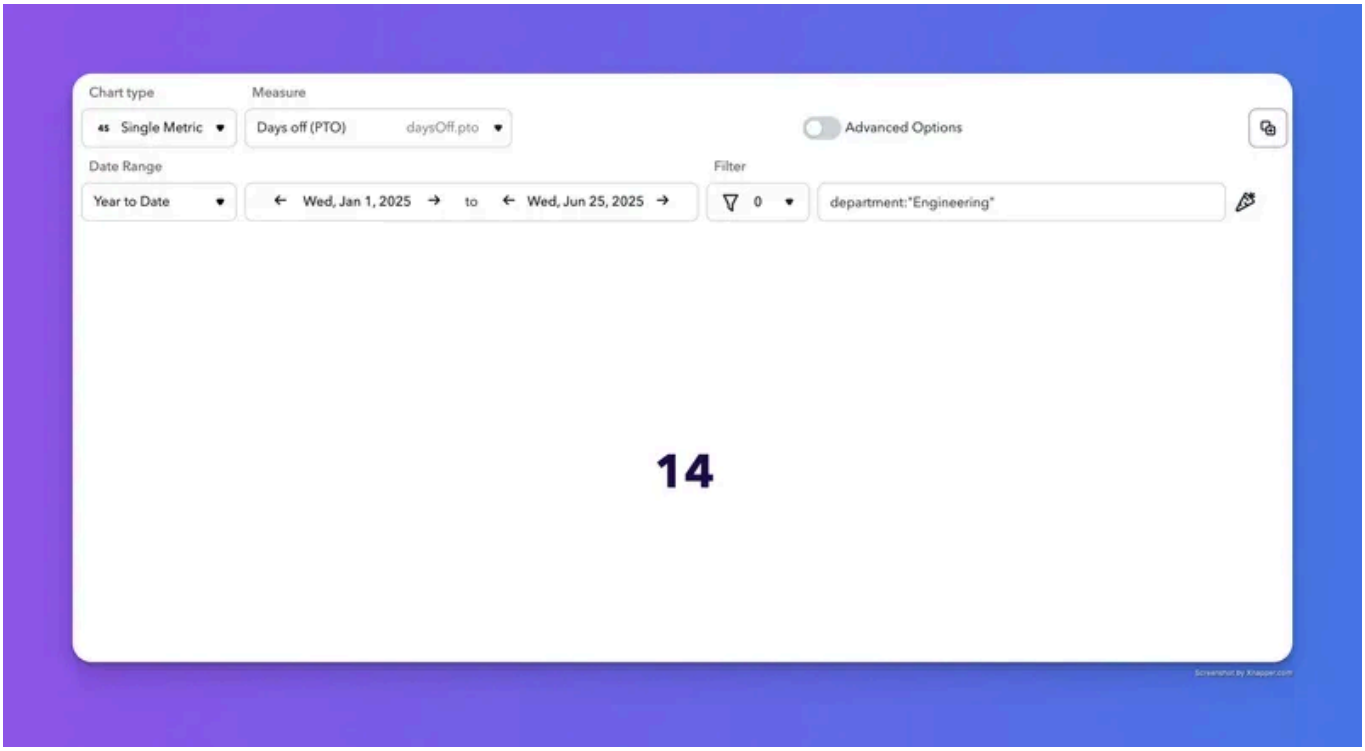
Bar charts make it easy to compare values across categories. Each bar represents a data point, so you can quickly spot differences, rank items, and highlight trends across groups.

Pie Chart



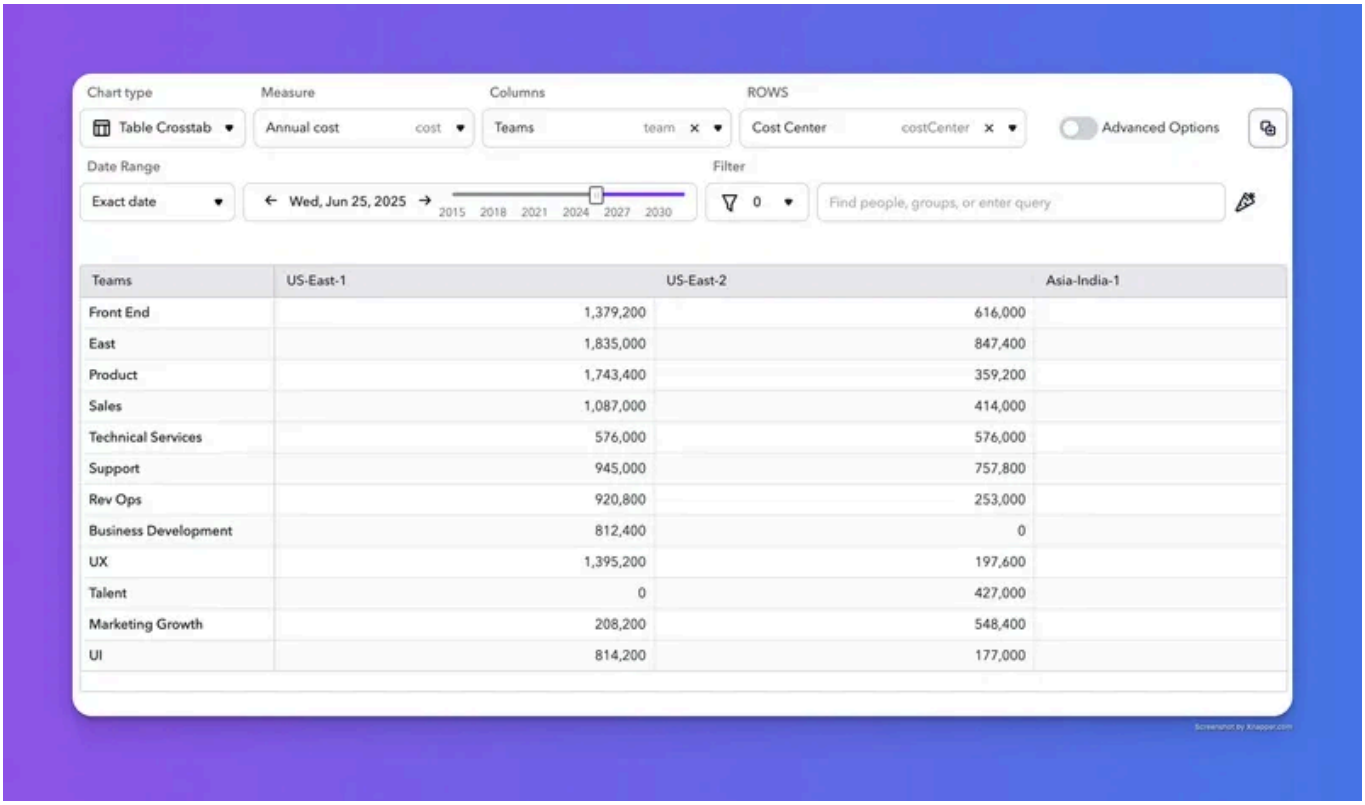
Pie charts show how a whole is divided into parts. Each slice represents a category's share, making it easy to visualize proportions at a glance. Multiple pie charts let you compare part-to-whole relationships across different groups. They're useful when you want to see how proportions shift between segments over time or across categories.

Single Metric



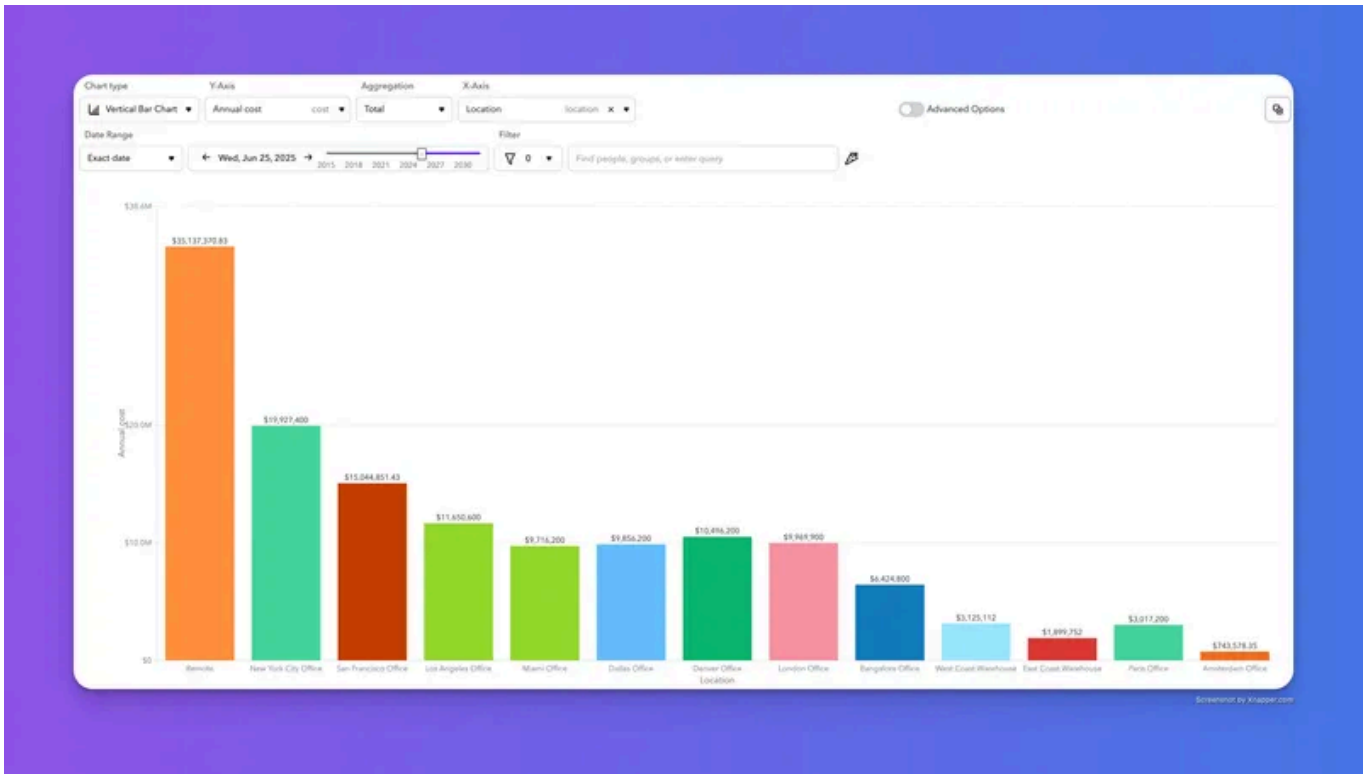
Single metrics highlight one key number—fast. They're great for calling out totals, KPIs, or any standout value you want to keep front and center.

Table Crosstab



Crosstab tables let you break down data by two dimensions to quickly compare values across categories. Ideal for spotting patterns, drilling into totals, and answering "where" and "who" questions in your data.

Vertical Bar Chart



Vertical bar charts make it easy to compare values across categories using columns. They’re great for showing differences, ranking items, and visualizing changes over time or across groups.

Additional Features

Date Range enables you to choose from a multiple of data options.

Time Slider (for Non-Timeseries) lets you move along the timeline of the organization to see the chart at different points in time.

Filter give you access to ChartHop's powerful filtering capabilities including the ability to filter using ChartHop's Carrot Query Language aka CQL.

Advanced Options introduces the ability to create the chart with a Carrot Expression as well as providing access to additional options based on the chart type.

Copy to Dashboard button lets you take the current chart and configuration and add it to a Dashboard.

11.8. Data Sheet: Group By and Progressive Loading

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

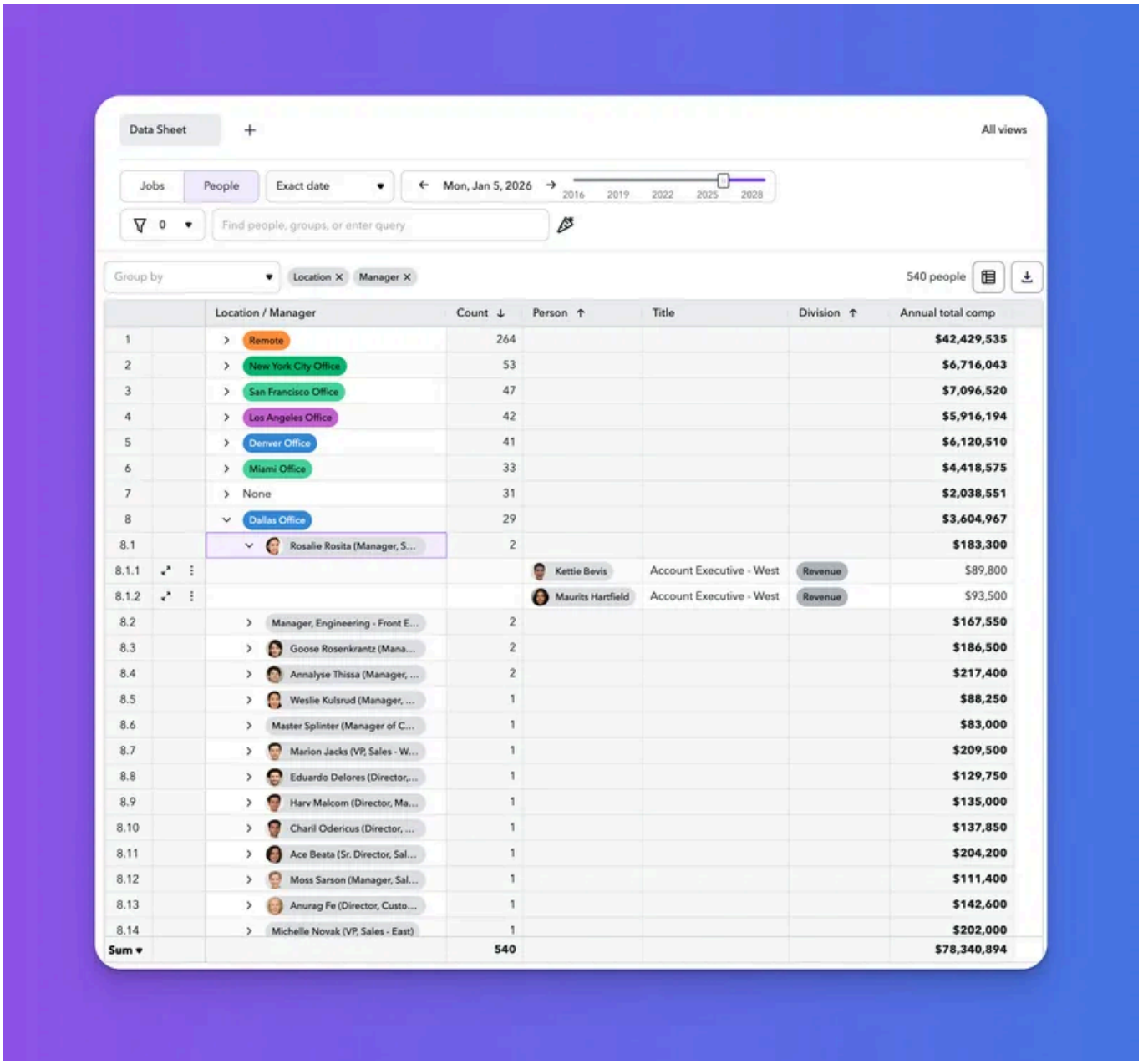
How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

These new capabilities enhance Data Sheets with powerful grouping functionality and performance improvements for large datasets. Group By allows you to organize and analyze data with pivot table like categories, while Progressive Loading ensures fast performance even with thousands of rows.

Group By

Group By transforms your Data Sheet into a consolidated view, allowing you to aggregate and analyze data by any field in ChartHop.



Group By

How to use Group By

1. Open any Data Sheet view
2. Click the "Group By" selector in the toolbar above the table
3. Select the field you want to group by (e.g., Department, Location, Manager, Job Level)
4. The sheet will reorganize to show grouped rows with expandable sections

What happens when you apply grouping

When you group your data:

- **Rows are organized hierarchically** — All people sharing the same value for the grouped field appear together under a collapsible header
- **Aggregate values are calculated** — Numeric columns automatically show totals or averages for each group (currently only selective fields that can be calculated are aggregated in Group By row). If person or job is not exclusive to a specific Group, they will not be counted more than once in total count or aggregation in the Sum row.
- **Navigation becomes easier** — Expand or collapse groups to focus on specific segments of your organization

Common use cases for Group By

- **Department analysis** — Group by Department to see headcount, total compensation, or average tenure across different parts of your organization.
- **Manager span of control** — Group by Manager to quickly identify direct report counts and team compositions.
- **Location planning** — Group by Location or Office to understand geographic distribution and plan for office space or regional strategies.
- **Compensation equity** — Group by Job Level or Comp Band to identify pay distributions and ensure equitable compensation practices.

Multi-level grouping

You can apply multiple Group By fields to create nested hierarchies:

1. Apply your first Group By (e.g., Department)
2. Click "Add Group By" to nest a second level (e.g., Job Level within Department)
3. Add one more if desired for a max of three nested GroupBys

This creates views like Department > Job Level > Location, allowing for sophisticated analysis of organizational structure.

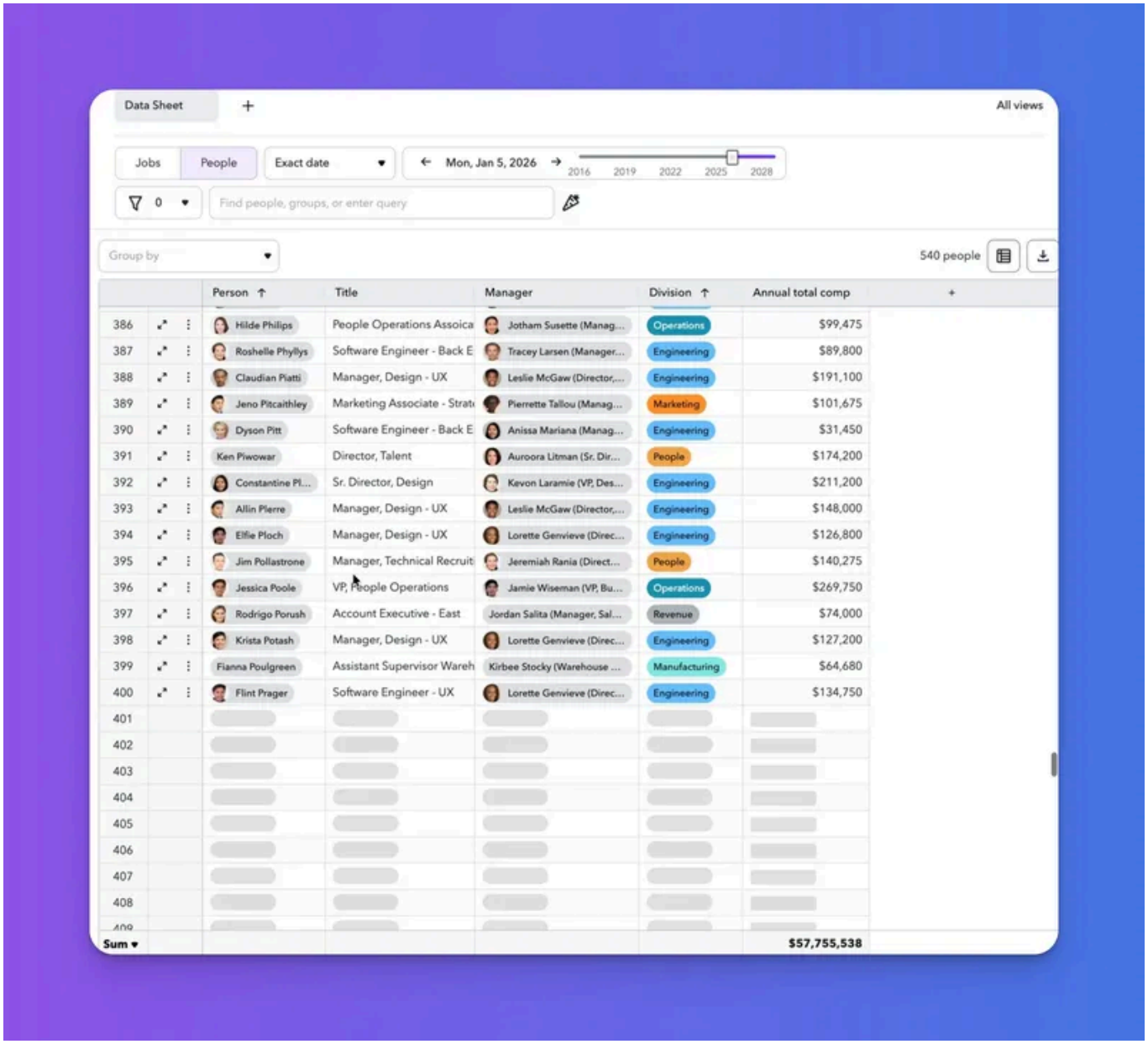
Working with grouped data

- **Expanding and collapsing groups** — Click the arrow icon next to any group header to expand or collapse that section. Use "Expand All" or "Collapse All" to manage all groups at once.

- **Filtering within groups** — Filters continue to work with grouped views, allowing you to group by Department while filtering to only active employees or specific locations.
- **Exporting grouped data** — (coming soon)

Progressive Loading

Progressive Loading dramatically improves performance for Data Sheets with large datasets by loading data incrementally as you scroll.



progressive loading

How Progressive Loading works

Instead of loading all rows at once, Progressive Loading:

1. **Loads an initial batch** — The first 100-200 rows appear immediately when you open the sheet
2. **Loads more as you scroll** — Additional rows are fetched automatically as you scroll down
3. **Maintains full functionality** — All filtering, sorting, and searching work across the entire dataset, not just loaded rows

Performance benefits

For large organizations, Progressive Loading delivers:

- **Faster initial load times** — Sheets with 5,000+ employees now load in seconds
- **Smoother scrolling** — No lag or freezing when navigating through large datasets
- **Reduced browser memory usage** — Only visible rows are rendered in your browser

Working with progressively loaded data

- **Searching and filtering** — When you apply a search or filter, ChartHop searches the entire dataset (not just loaded rows) and returns all matching results.
- **Sorting** — Sort operations work across the full dataset and will reload the sheet with the new sort order applied.
- **Exports** — Exporting always includes all rows, regardless of how many have been progressively loaded in your browser.

Group By with Progressive Loading

When using Group By on large datasets, groups are loaded progressively as you expand them, maintaining fast performance. These features work seamlessly together for analyzing large organizations:

1. Apply Group By to organize data (e.g., by Department)
2. Progressive Loading ensures each group loads quickly
3. Expand groups as needed to drill into specific segments
4. Navigate through thousands of employees with consistent performance

This combination is particularly powerful for executive dashboards, annual planning reviews, and organization-wide compensation analysis.

11.9. Finch Integration

This app is currently in Beta.

We're really excited about it and it's already being used by multiple organizations.

Try it out and send feedback to the ChartHop team or directly to **product-feedback@charthop.com**.

How to setup a Beta Feature

1. From the left sidebar, select **Admin,** then select **Apps & Bundles**.
2. Under "**Payroll and HCM Apps**", select "**Other Payroll & HCM's**"
3. Read below for additional setup instructions and context about what will be activated when you save settings.

Overview

The Finch integration is a one way sync that allows for syncing data into ChartHop from many applications. Offering more integrations empowers our customers by expanding data access, reducing manual work, and improving overall efficiency.

What integrations does Finch support?

Finch offers an integration with over 200 payroll and HR providers. You can see the full list **here**.

Assisted vs Automated Integrations

The difference between **automated** and **assisted** integrations comes down to how frequently data flows between systems:

- **Automated Integrations**: These are fully API-driven, meaning data moves seamlessly between applications without manual intervention. They sync data automatically every 24 hours and require no extra configuration once set up.

- **Assisted Integrations**: These act as a workaround when an API is unavailable or restricted. Instead of direct API access, a third party (like Finch) is granted permission to pull and standardize data from a system. This data is refreshed every 7 days.

Find out what integration type your application has **here**.

11.9.1. Security of Third-Party Integrations: Finch

Overview

Finch is a subcontracted service provider used by ChartHop to deliver certain HR and payroll integrations. We perform due diligence and ongoing security reviews of Finch as part of our vendor management program. While each organization's procurement and security requirements differ, many customers rely on our vendor assessment process rather than conducting a separate review of Finch.

If your internal policies require direct review of subprocessors or third-party service providers, we're happy to discuss Finch's role and provide available documentation.

Finch's role in the integration

Finch operates as a unified API that connects to HR and payroll systems on behalf of the integration. When an integration is powered by Finch, employer and employee data flows through Finch's infrastructure as part of delivering the connection.

Finch's security and compliance posture

Finch maintains a third-party-audited security program. Its publicly attested compliance frameworks include *(as of Jun 1, 2026)*:

Framework	Status
SOC 2 Type II	Audited annually by a certified third party
HIPAA	Compliant
GDPR	Compliant
CCPA	Compliant
EU-U.S. / Swiss-U.S. Data Privacy Framework (DPF)	Self-certified

Finch's program covers the areas customers most often assess, including access controls and encryption, vulnerability management with regular third-party penetration testing, incident response, vendor risk management, availability and business continuity, and change management.

Accessing Finch's documentation

Detailed documentation (NDA required)

Finch's detailed security materials are available through Finch's Trust Center under NDA. To request access, please submit a request directly at the Trust Center so the NDA can be processed with your organization:

https://finch.secureframetrust.com

General overview (no NDA required)

For a high-level overview of Finch's security program that is not gated, see Finch's security whitepaper:

https://www.tryfinch.com/resources/whitepapers/security

> **How to proceed:** If your security or procurement team requires a direct review of Finch as a subprocessor, we recommend requesting the gated documentation through Finch's Trust Center so the NDA can be handled directly between your organization and Finch. For a general understanding of Finch's posture, the security whitepaper above is the best starting point. Reach out to your ChartHop contact with any questions about Finch's role in your integration.

11.10. Google Sheets Inbound Integration

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

Overview

Bring business and other company data into ChartHop with our Google Sheets Integration.

Contact the ChartHop team to learn more.

Places to utilize data from Google Sheets:

- Tables
- Home Page
- Profile Tabs
- Dashboards
- Forms (Text blocks)
- Resource Pages
- Letter Templates

Setup instructions

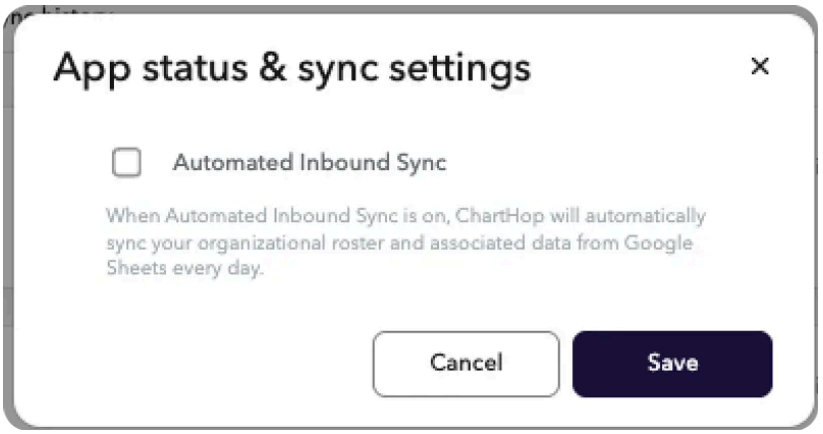
Installing the application

In labs, enable "Google Sheets Integration". You will then see "Google Sheets" display on the apps page under the tab "Other available apps". Once you click install, it will guide you to connect your Google account so we can access the data in the shared sheets. Once

installed, you can rename the application to better match the data you are pulling in. **ChartHop cannot access data that you have not explicitly mapped to ChartHop tables or fields.**

Sync frequency

You can choose to automate this sync and have it run daily, or you can manually run it at your discretion.



Sync options

Mapping to a table in ChartHop

Note: The table needs to be created first in ChartHop before you can map to it.

All values must match EXACTLY, including any trailing white spaces. If there is a space, dash, or non alphabet character in the name, wrap the name in `[""]`. You **CAN** wrap any value in the brackets and quotes.

To map to a column in a table, you need to know the table code name (see below), and the field code name for the column.

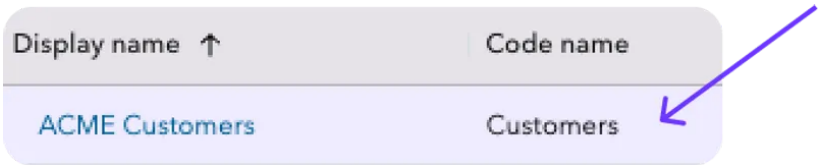
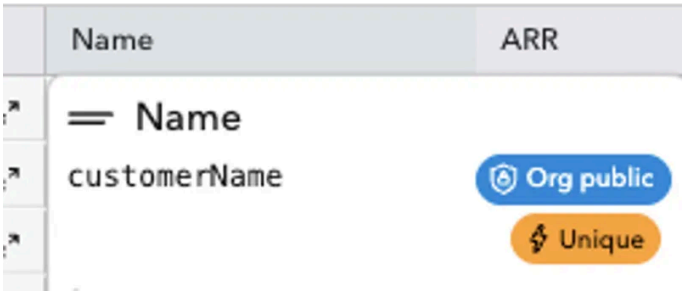


Table code name



Field code name for column

You can map columns from different sheets within the same Google Sheet. You need to know the name of the sheet, and the name of the column.



In this example, the sheet is labeled `Customers` and the columns we want to map are `Customer` and `Contract End.`

Inbound field mapping example

ChartHop Table	Google Sheet Column
`Customers.customerName` (this column is marked as `unique` in the table)	`["Customers"].["Customer"]`
`Customers.contractEnd`	`["Customers"].["Contract End"]`

- The first field mapped needs to be the unique field. This is a value that does not repeat in its column, and can be as simple as `row number`.
- Notice above how the values are wrapped in brackets and quotes. `Contract End` MUST be wrapped in those values to be read by ChartHop. However, you can wrap any other values for consistency.

Once all of your field mappers are set, you can click "save mappers" and run the sync.

Google Sheets Integration access

Initially, only Owners have the ability to install and edit the Google Sheets App.

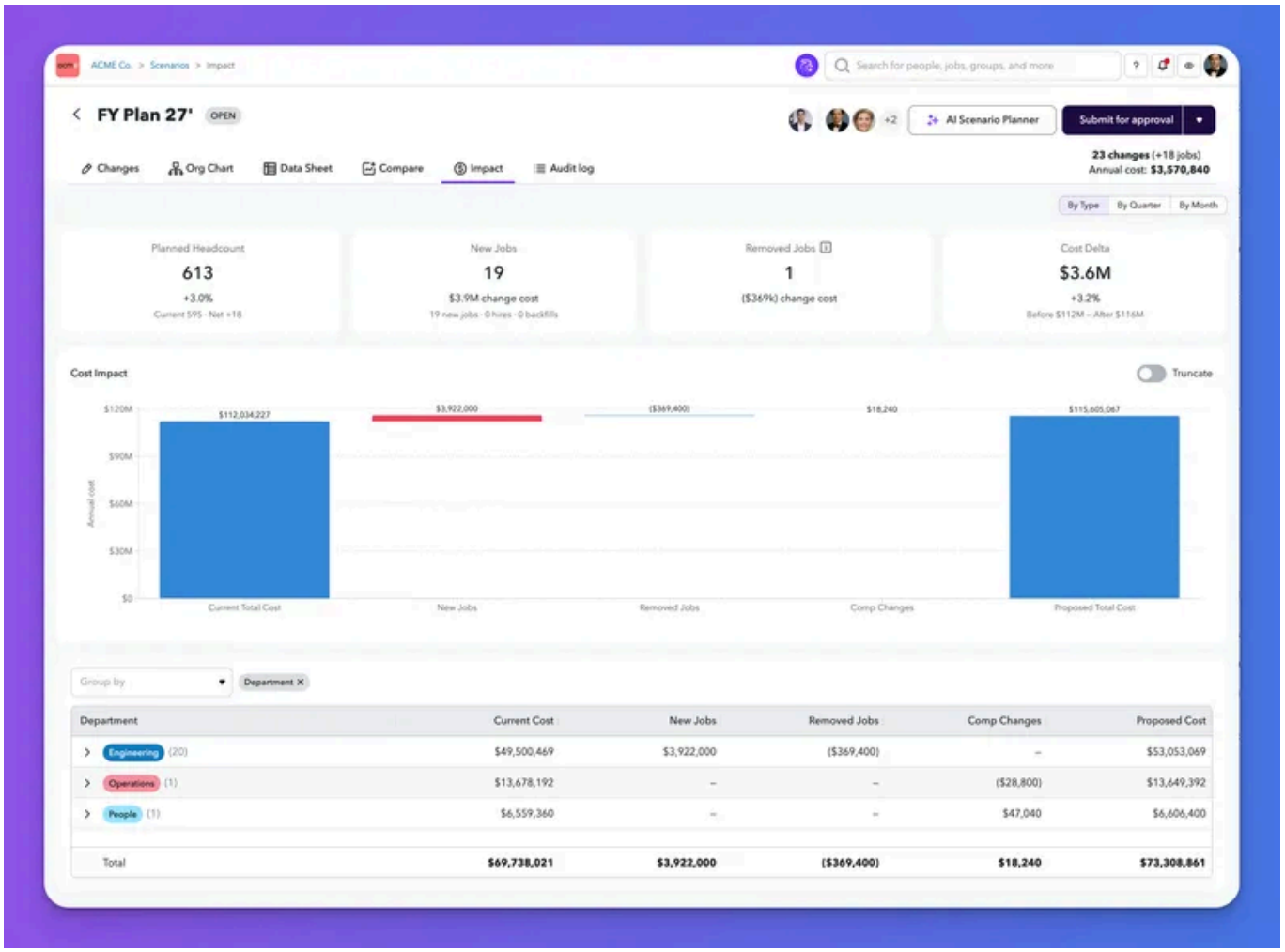
Fields synced from Google Sheets utilize ChartHop's **field settings**, so anyone in the organization can be given access to view the data in the corresponding fields.

11.11. Impact Dashboard

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to set up an Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

The **Impact Dashboard** is a finance-oriented view built into Custom Scenarios. It gives planners and finance stakeholders a real-time summary of the cost and headcount impact of any changes modeled in a scenario — without having to export data or build a separate report.

The Impact Dashboard is accessed via the **Impact** tab inside a Custom Scenario.



Layout

The Impact Dashboard is organized into three sections:

1. Key metrics

At the top, four summary tiles give you an at-a-glance view of the scenario's impact:

- **Planned Headcount** — the total headcount if all scenario changes are applied
- **New Jobs** — the number of new positions added in the scenario
- **Departures** — the number of positions removed in the scenario
- **Cost Delta** — the net change in annualized compensation cost between the current org and the scenario

2. Waterfall chart

Below the key metrics, a waterfall chart visualizes how cost moves from your current state to the proposed state. The chart shows:

- **Current Total Cost** — your baseline
- **New Jobs** — cost added by new hires
- **Departures** — cost removed by departures
- **Comp Changes** — cost impact of compensation adjustments
- **Proposed Total Cost** — the net result

3. Pivot Table

Below the waterfall, a pivot table breaks down cost changes by organizational dimension (Department by default). For each group, the table shows:

- Current Cost
- New Jobs cost impact
- Departures cost impact
- Comp Changes cost impact
- Proposed Cost

Expanding a row in the pivot table reveals the individual changes that make up that group's numbers.

View modes

A toggle in the top-right of the Impact Dashboard lets you switch between three ways to view the data:

Mode	Description
By Type	Groups changes into categories: New Jobs, Departures, and Comp Changes. This is the default view.
By Quarter	Breaks changes out across fiscal quarters, from the current quarter through however many quarters are needed to capture all planned changes.
By Month	Breaks changes out month by month, extending as far forward as needed to show the full impact of all planned changes.

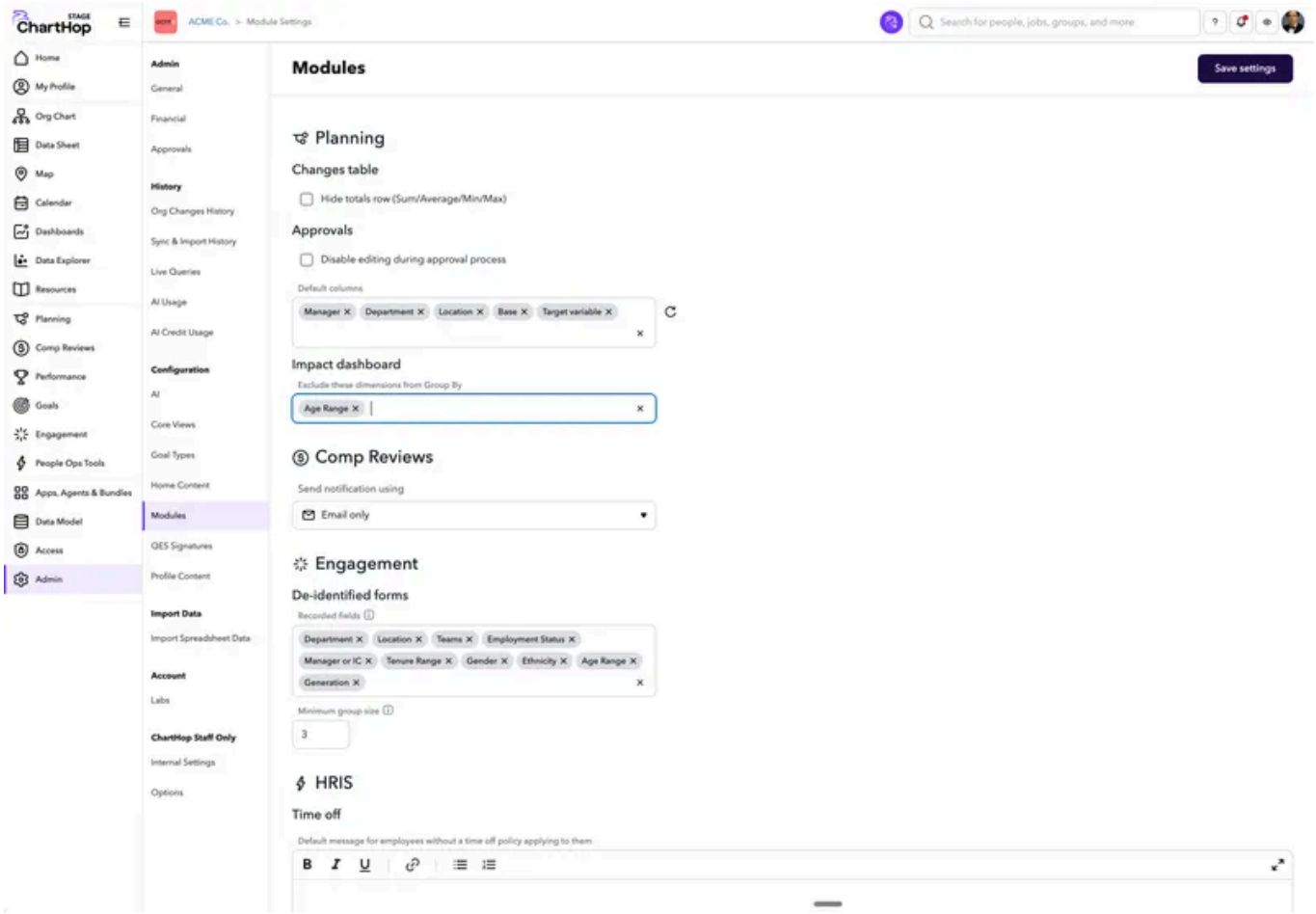
In Quarter and Month views, the dashboard dynamically extends its window — it will show as many quarters or months as necessary to reflect the last date of any change in the scenario, rather than cutting off at a fixed horizon.

Group By dimensions

The pivot table and breakdown views let you group results by organizational dimensions. The available dimensions are limited to field types that produce meaningful categories:

- **Organizational groups** — Department, Location, Band/Level, Teams, and any custom group types your organization has configured
- **Single-select fields** — fields like Employment Type, Exempt status, or Departure Type
- **Calculated ranges** — fields that bucket continuous values into categories, such as Age Range, Tenure Range, and Generation
- **Scale fields** — ordered categorical fields, such as Recruiting Priority

Fields that are unique per person (like employee IDs or free-text fields) are excluded, since they don’t produce useful groupings.



Excluding a dimension

Excluding dimensions (Admin configuration)

If your organization wants to restrict which dimensions are available in the Impact Dashboard — for example, to exclude Age Range or Ethnicity from planning conversations — an administrator can configure this.

1. Go to **Admin** > **Configuration**.
2. Under the **Modules** section, find the **Impact Dashboard** settings.
3. Select any Group By dimensions you want to exclude from the list.

Excluded dimensions will be hidden from the Group By picker for all users in your organization.

Number formatting

The Impact Dashboard uses **accounting-style formatting** for all financial figures:

- Reductions in cost are shown with parentheses, e.g. **($40,000)** rather than -$40,000
- Numbers are not colored red or green — all figures appear in black regardless of whether they represent an increase or decrease

This keeps the dashboard consistent with standard financial reporting conventions.

Who can see it

The Impact Dashboard is visible to anyone with access to the Custom Scenario. Financial data (compensation costs) is governed by each viewer's role and data access permissions — users without compensation visibility will see headcount changes but not cost figures.

How to access it

1. Navigate to **Planning** and open a Custom Scenario.
2. Select the **Impact** tab at the top of the scenario view.

Note: The Impact tab only appears if the feature has been enabled for your organization by your CSM.

11.12. Microsoft Teams Integration

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Overview

Import pictures from Microsoft Teams. If you would like to have notifications send out, please reach out to support@charthop.com or your CSM for more information.

Setup instructions

Installing the application

In labs, enable "Microsoft Teams". You will then see "Microsoft Teams" display on the apps page under the tab "Other available apps". Once you click install, it will guide you to connect your Microsoft account so we can access images.

11.13. Language Selection

This feature is currently in Beta.

We're really excited about it and it's already being used by multiple organizations.

Try it out and send feedback to the ChartHop team or directly to product-feedback@charthop.com.

How to setup a Beta Feature

1. From the left sidebar, select **Admin,** then select **Labs**.
2. Use the switch to toggle on the feature, then press the **Save settings** button.
3. Read below for additional setup instructions and context about what will be activated when you save settings.

Overview

Language selection allows you to view ChartHop pages in selected languages. Currently, this applies to all non-user entered text in ChartHop.

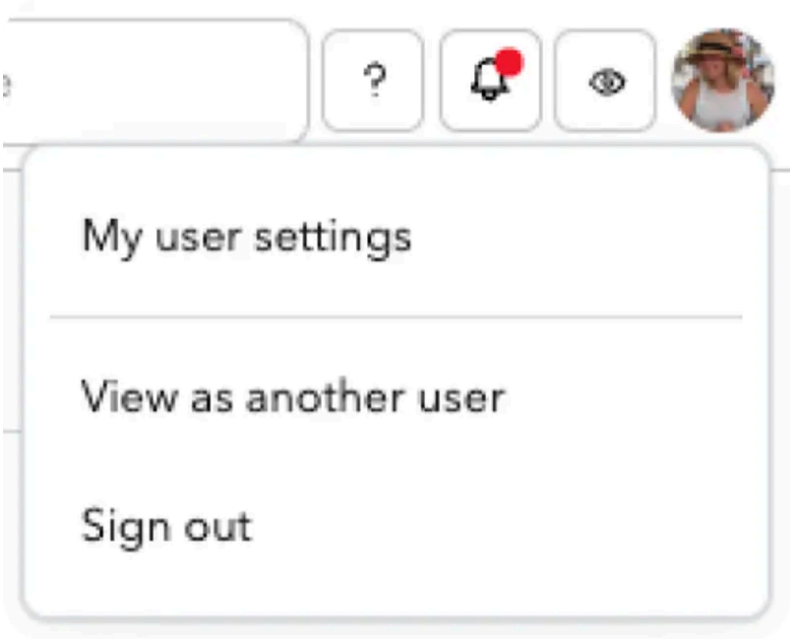
How to choose what languages employees can select

This can be done after enabling language selection in labs.

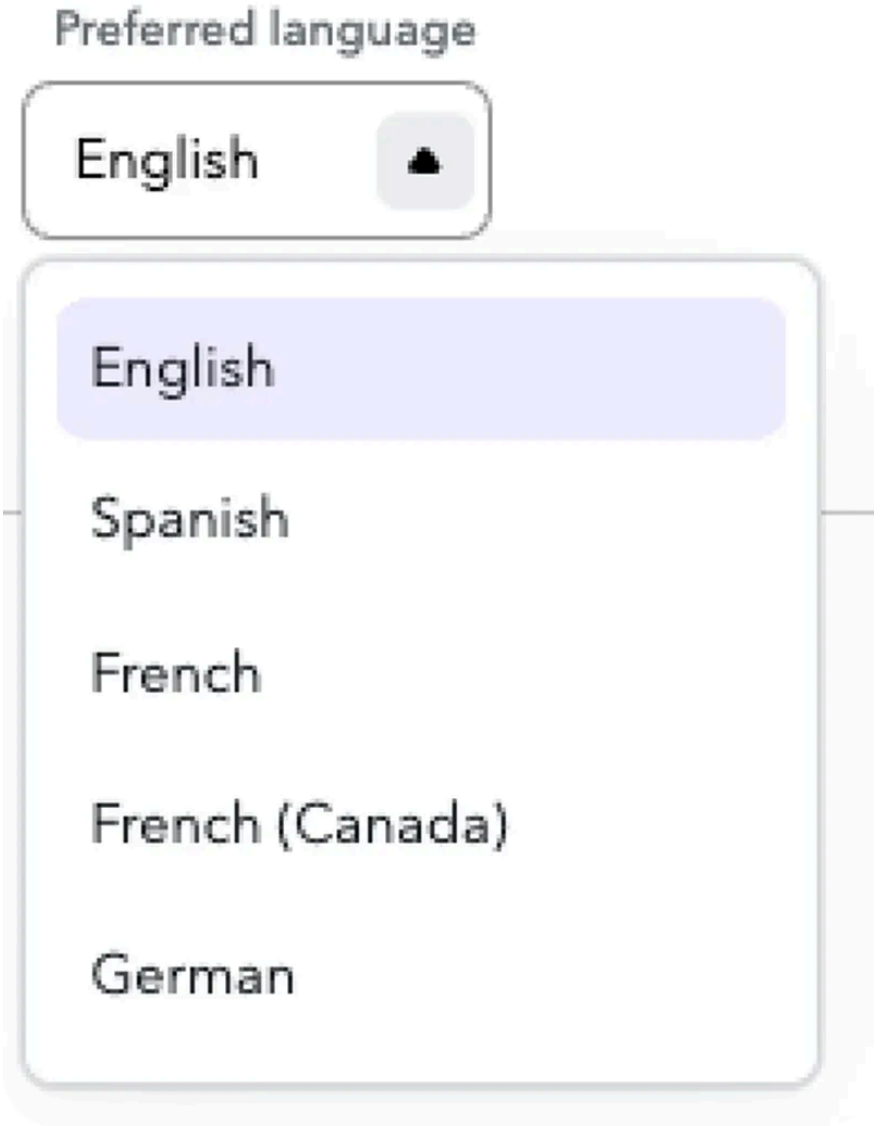
- In Admin → general
- Under "Language translations", select your languages
- Click "Save" at the top

How to set your preferred language

Once language selection is enabled, you can set your preferred language in your user settings.



In "My user settings", you can select your preferred language, and click save.



Choose your language to display

11.13.1. Customizing translations

Overview

What is translated automatically

- Built in ChartHop fields labels and response options
- Native ChartHop text

What can be translated via AI or manually edited

- Custom field labels
- Form questions
- Written form responses

What is on the roadmap for translations

- User-entered dashboard names, data sheet names, engagement survey, performance review and compensation cycle names.
- Dates on people moves and anniversaries widget

How does CQL work with translations?

All field code names will stay in the original language they were written. This makes it easier for ChartHop support to help your teams leverage the power of CQL, as well as ensure that custom fields can continue to work with bundles and apps as originally intended. Therefore, we will not translate CQL and we do not recommend changing the code name in a way that could introduce inconsistency

Field translations

Adding translations to existing custom fields

1. Open the field from the field edit dialog
2. Click “Translations”

3. Choose the language you want to translate in
4. Click “AI translate” or enter your own translation.

Changing translations for built-in fields

1. Open the field from the field edit dialog
2. Click “Translations”
3. Choose the language you want to translate in
4. Click “AI translate” or enter your own translation.

Creating a new custom field

1. Create a new field
2. Save field
3. AI will automatically translate in all languages your company is supporting. You can then go in and edit the translation if needed.

How can I determine what language a field was originally created in?

All built in fields are built in English, as that is the default administrative language of ChartHop. A custom field can be written in any language, and that language would NOT show up as a translation option on the translate tab.

I.e. I created this custom field in English, so when I go to the translation tab, “English” does not show up as an option.

Form translations

Translating questions

When you create a form, you can start writing your questions on the main tab. Then go to “Translations” and you can choose the language you want to translate into.

Selecting “AI Translation” will translate ALL form questions and response options automatically, and then you can edit the translations as desired.

What if a question is a field?

The translation is the same! You can translate the field question and response options in the form translation, and also edit it as a field in the data model tab.

Form Responses

Are form responses automatically translated?

No. Responses can be translated per form by clicking the “translate” button. The button will only show up if the form response text was written in a language that is DIFFERENT than the users selected language.

Are responses AI translated? Can I change it?

Right now responses are AI translated, and the translation will be the same each day that you translate that response. You cannot change these response translations currently.

Can I see the original user entered text even if it’s not in my user language?

Yes! You have the ability to translate the text, and then revert and see the original text as well.

11.14. 15Five Integration

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

The 15Five integration is a one way sync that allows the syncing of forms and reviews from 15Five into ChartHop.

What information is synced from 15Five

The 15Five app will import and sync the following pieces of information:

1. 15Five Review Cycles → ChartHop Forms & Performance Reviews

Imports will align to the following details:

- Competency questions in 15Five are imported as numeric scale fields with Manager Only access in ChartHop. If the competency scale was changed, it will create a new field.
- All other questions are mapped as fields in the form, and will have a corresponding share access that most closely aligns from 15five.
- All forms are imported as “Archived”
- You can identify forms and fields and reviews created by the app because they will list "15five" as the "Created by".
- Changing the name of the form or review in ChartHop will break a continuous sync.

> If you would like any additional or different information synced from 15Five, please let the ChartHop team know.

How to setup the 15Five App

1. Go to **Apps & Bundles > Apps**
2. Navigate to the **Other Available Apps** and search for **15Five**
3. Install the **App** and add in your **API key from 15Five**
    1. To generate an **API key in 15Five:**
        - Click the **Settings gear** in the bottom-left corner of the 15Five account
        - Select **Integrations** from the dropdown menu
        - Click **Enable** to the right of the Public API option
        - Once enabled, you'll land on the **Company API keys** page
        - Click **Create new key**
        - Add a short name for the API key (something identifiable server-side)
        - Copy the **access token** and use it to authenticate

Review Cycles

Performance reviews will be created for every Best-Self Review cycle in 15Five. Separate ChartHop **Forms** will be created for each direction or type of review.

For example — A 360 review named `2023 Q1 Review Cycle` will contain forms for each direction of feedback:

- 2023 Q1 Review Cycle - Self
- 2023 Q1 Review Cycle - Downward
- 2023 Q1 Review Cycle - Upward
- 2023 Q1 Review Cycle - Peer

Not all review types are required. A 15Five cycle can include any combination of Self, Manager, Peer, and Upward reviews. Only the review types that were enabled for a given cycle will produce corresponding forms in ChartHop.

If you have multiple cycles in 15Five with similar names that you would like to combine in ChartHop list the name you would like to combine in the **Condense Cycle Names** setting. For example, you would write `2024 Q3 Review Cycle` if you had 2 review in 15Five

named: `2024 Q3 Review Cycle: Retail` & `2024 Q3 Review Cycle: Office` that you wanted to combine into one review called `2024 Q3 Review Cycle.`

NOTE: We will only import completed cycles, and forms and fields that have responses saved to them. For example, if a review is in DRAFT status, it will not sync over. We also won't sync over a question without responses.

Import ratings as fields

All Opinion Scale questions in 15Five will be imported as Numeric Scale questions in ChartHop. This includes standard opinion-scale questions as well as competency and company value rating questions. All fields will be imported with a sensitivity of `Manager Only` at this time. The fields will be named:

> **Label**: The question text, such as: "Rate [Name]'s contribution to the company value: Always Be Learning & Growing"
> **Code**: `fifteenfive` + `TheQuestionsFirstCharacters – e.g., fifteenfiveRateNamesContributionTo`

> Changing the code of the field will throw off the sync and cause an additional field to be created.

How imported form responses will appear to employees

Imported form responses are not immediately visible to employees, but can be surfaced on **Custom profile tabs**.

Imported form responses will display **"Imported from 15Five"** on the form response.

11.15. Lattice Integration

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

The Lattice integration is a one way sync that allows the syncing of forms and reviews from Lattice into ChartHop.

What information is synced from Lattice

The Lattice app will import and sync the following pieces of information:

1. Lattice Updates → ChartHop Forms
2. Lattice Feedback → ChartHop Forms
3. Lattice Review Cycles → ChartHop Forms & Performance Reviews

Imports will align to the following details:

- Rating scale questions in Lattice are imported as numeric scale fields with Manager Only access in ChartHop
- All other questions are mapped as questions in the form, not fields.
- Access levels will align to the similar strucutre in Lattice. See full mapping below.
- All forms are imported as “Archived”
- You can identify forms and fields and reviews created by the app because they will list "Lattice" as the "Created by".
- Changing the name of the form or review in ChartHop will break a continuous sync.

> If you would like any additional or different information synced from Lattice, please let the ChartHop team know.

How to setup the Lattice App

1. Go to **Apps & Bundles > Apps**
2. Navigate to the **Other Availible Apps** and search for **Lattice**
3. Install the **App** and add in your **API key from Lattice**
    1. To generate an **API key in Lattice:**
        1. Navigate to Admin > Platform > API keys.
        2. Click **Generate API key.**
        3. After the key is generated, click **Copy.**

Lattice Updates & Feedback

Updates and feedback will be imported with the following access levels that align with the access in Lattice.

Forms	Access level in ChartHop
Lattice Private Updates	Manager shared
Lattice Public Updates	Org Public
Lattice Public Feedback	Org Public
Lattice Manager Only Feedback	Manager only
Lattice Private + Manager Feedback	Manager shared
Lattice Private Feedback	Personal

Review Cycles

Performance reviews will be created for every review cycle in Lattice. Separate ChartHop **Forms** will be created for each direction or type of review.

For example — A 360 review named `2023 Q1 Review Cycle` will contain forms for each direction of feedback:

- 2023 Q1 Review Cycle - Self
- 2023 Q1 Review Cycle - Downward
- 2023 Q1 Review Cycle - Upward
- 2023 Q1 Review Cycle - Peer

If you have mutliple cycles in Lattice with similar names that you would like to combine in ChartHop list the name you would like to combine in the **Condense Cycle Names** setting. For example, you would write `2024 Q3 Review Cycle` if you had 2 review in Lattice named: `2024 Q3 Review Cycle: Retail` & `2024 Q3 Review Cycle: Office` that you wanted to combine into one review called `2024 Q3 Review Cycle.`

Import ratings as fields

All Rating Scale questions in Lattice will be imported as Numeric Scale questions in ChartHop. All fields will be imported with a sensitivity of `Manager Only` at this time. The fields will be named:

- **Label:** The question such as: "How did this employee perform to their 90 day objectives?"
- **Code:** `lattice` + `TheQuestionsFirstCharacters` ex. `latticeHowDidThisEmployeePerfo`

All other field types are not able to be imported as fields at this time.

> Changing the code of the field will throw off the sync and cause an additional field to be created.

How imported form responses will appear to employees

Imported form responses are not immediately visible to employees, but can be surfaced on **Custom profile tabs**.

Imported form responses will display **"Imported from Lattice"** on the form response.



11.16. Preboarding

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

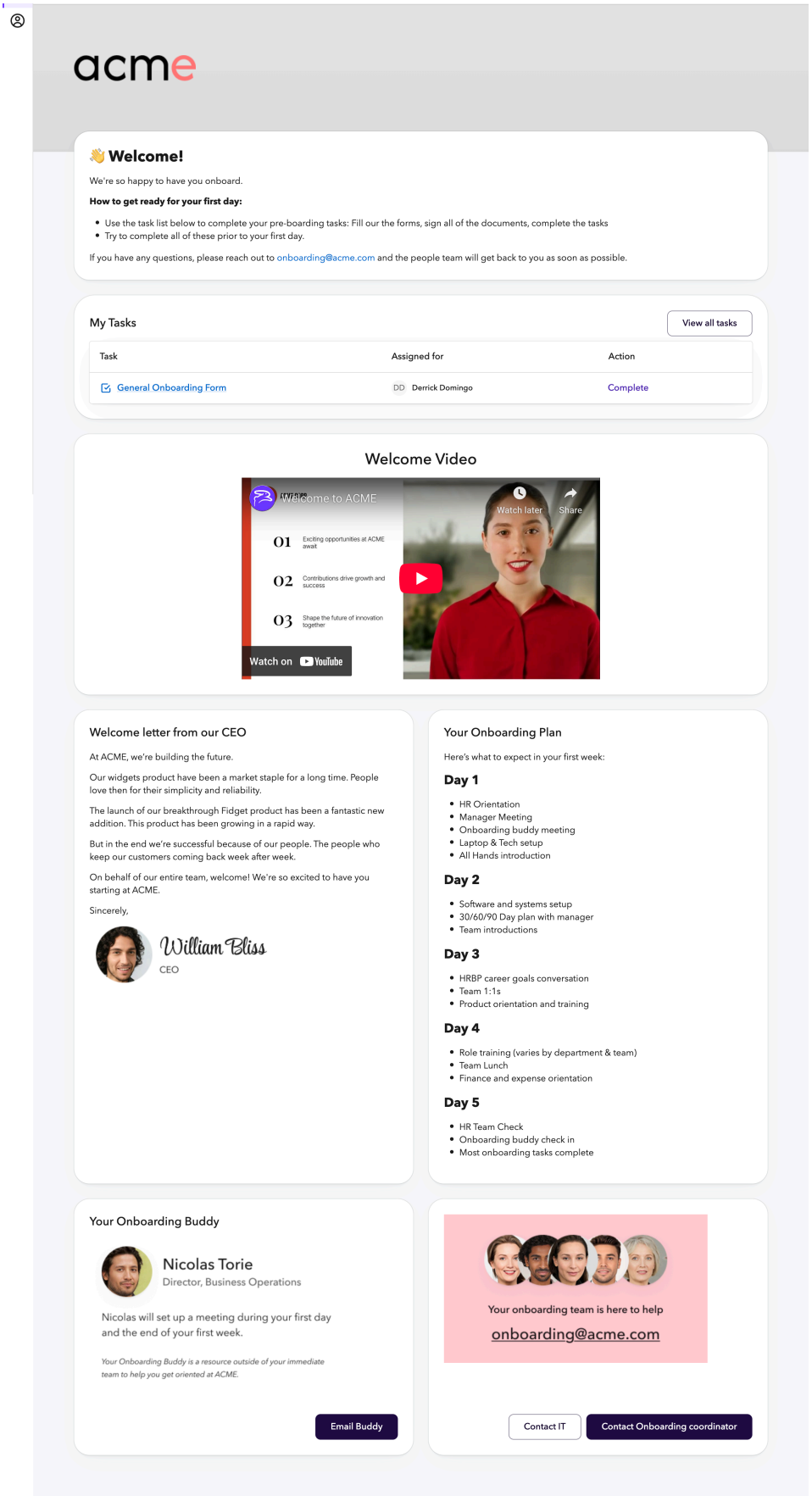
How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Create a branded, personalized preboarding experience for your new hires.

Manage all of the tasks, documents, forms before they get started.

Contact the ChartHop team to get your preboarding portal setup (currently leveraging a custom profile tab).



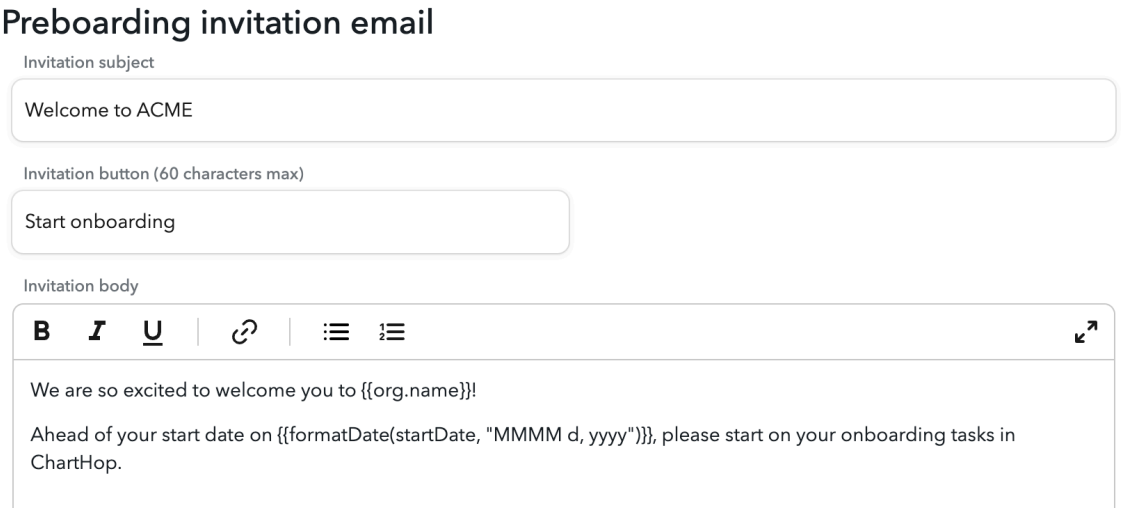
Example preboarding portal

Set up your account for Preboarding

Preboarding combines setup across:

- Profile Tabs (used to create the welcome page for Preboarding employees)
- Automated actions
- Data sheet

We suggest using the **Preboarding bundle** to get started.

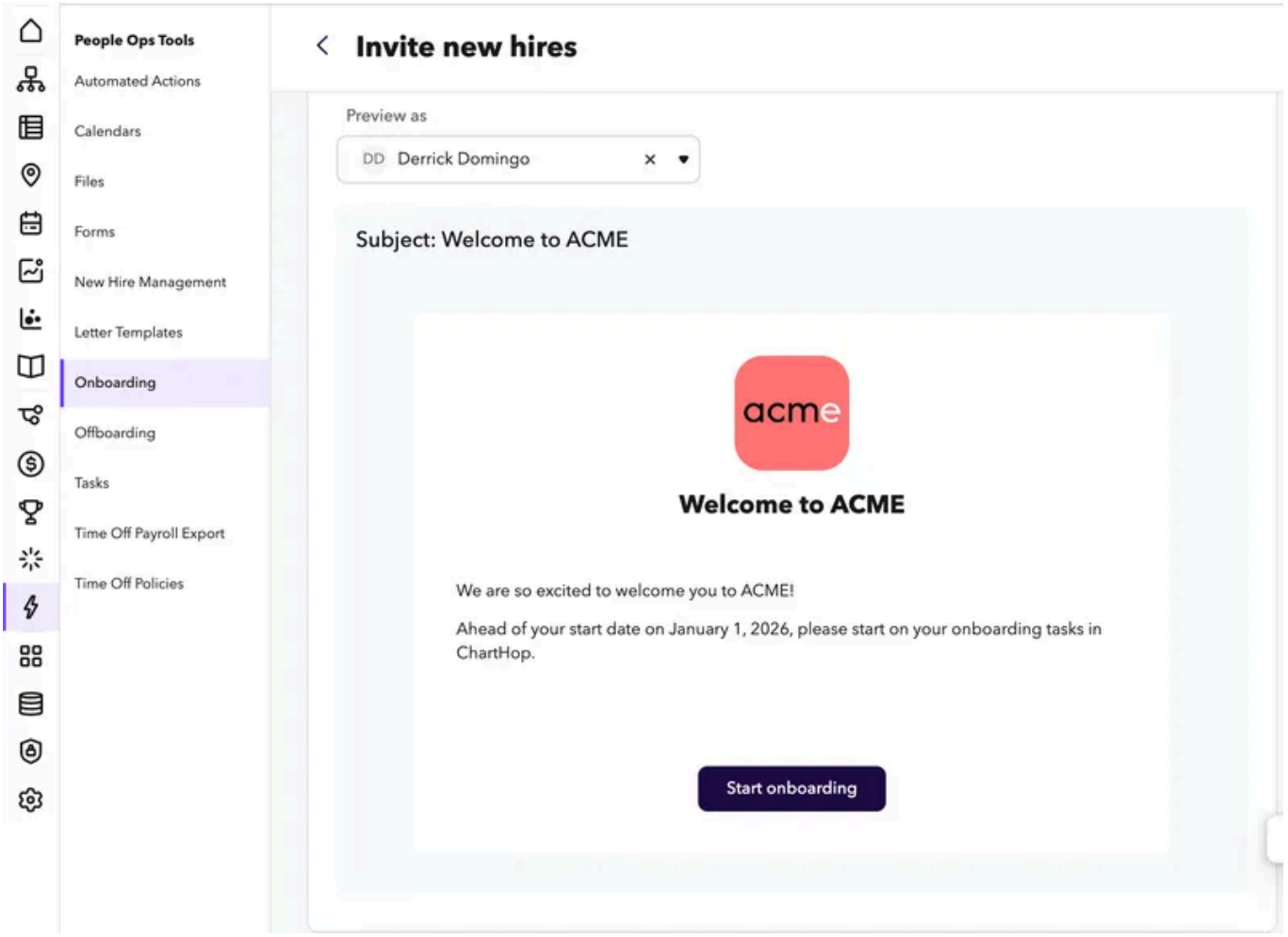


Setup preboarding invitation email

New hires will receive an email to login to ChartHop to complete their preboarding tasks.

To setup the preboarding invitation email:

1. Go to **Access > Settings** page
2. Locate the **Preboarding invitation email** section
3. Add the **subject**, **button copy** and **invitation body**. You can use conditional statements in **Carrot** to vary the message by person.
4. Preview the message by sending a test email or going inside the **Invite new hires** flow



Inviting preboarding users to ChartHop

How to invite new preboarding users:

1. Go to the Onboarding Page
2. Click **Invite new hires**
3. **Select the new hires** you want to invite
4. **Review and revise** relevant infomration
5. **Customize** the invitation email
6. Send the invitations to the new hires.

Preboarding users status & access role

Preboarding users still use the ChartHop portal, but their access is limited to only information about themselves, their onboarding screen and tasks they can do about

themseleves.

FAQs

If it is before a new hire's announce date, can they go through preboarding?

Preboarding consists of several steps and some are currently supported and some are not.

Preboarding Step	Supported for Unannounced New Hires
Invite new hire	✅ The new hire should show up in the list of people that can be invited
Actions triggered by inviting new hire	✅ These should still trigger when invited
Actions triggered by X days before a start date	❌ These actions will not trigger before the person's announce date.

11.16.1. Preboarding Templates

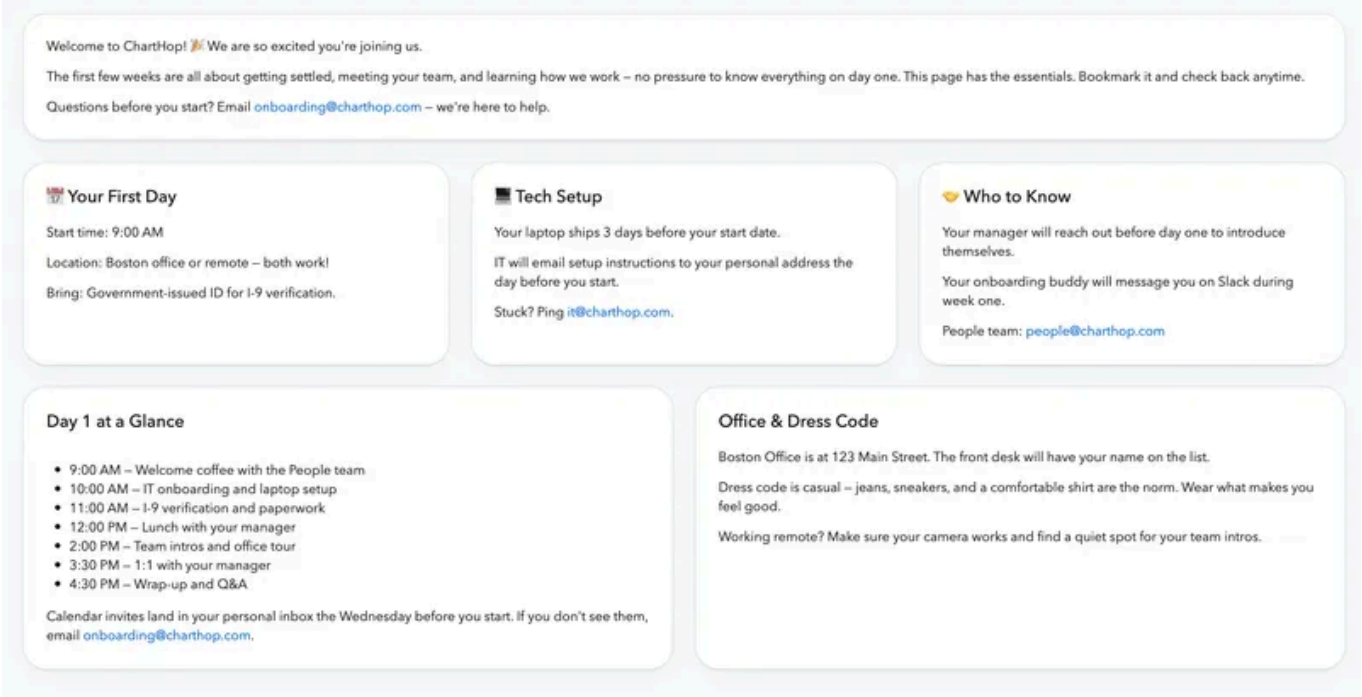
Setting up your home page shouldn't be hard!

Here are some template ideas you are welcome to copy, paste, and make your own.

Before go-live

All profile tabs need to be named "Onboarding" to be accessible for preboarding users. To be able to leverage customized JSON, check "V2". When you are ready for users, check "Active".

Example 1:



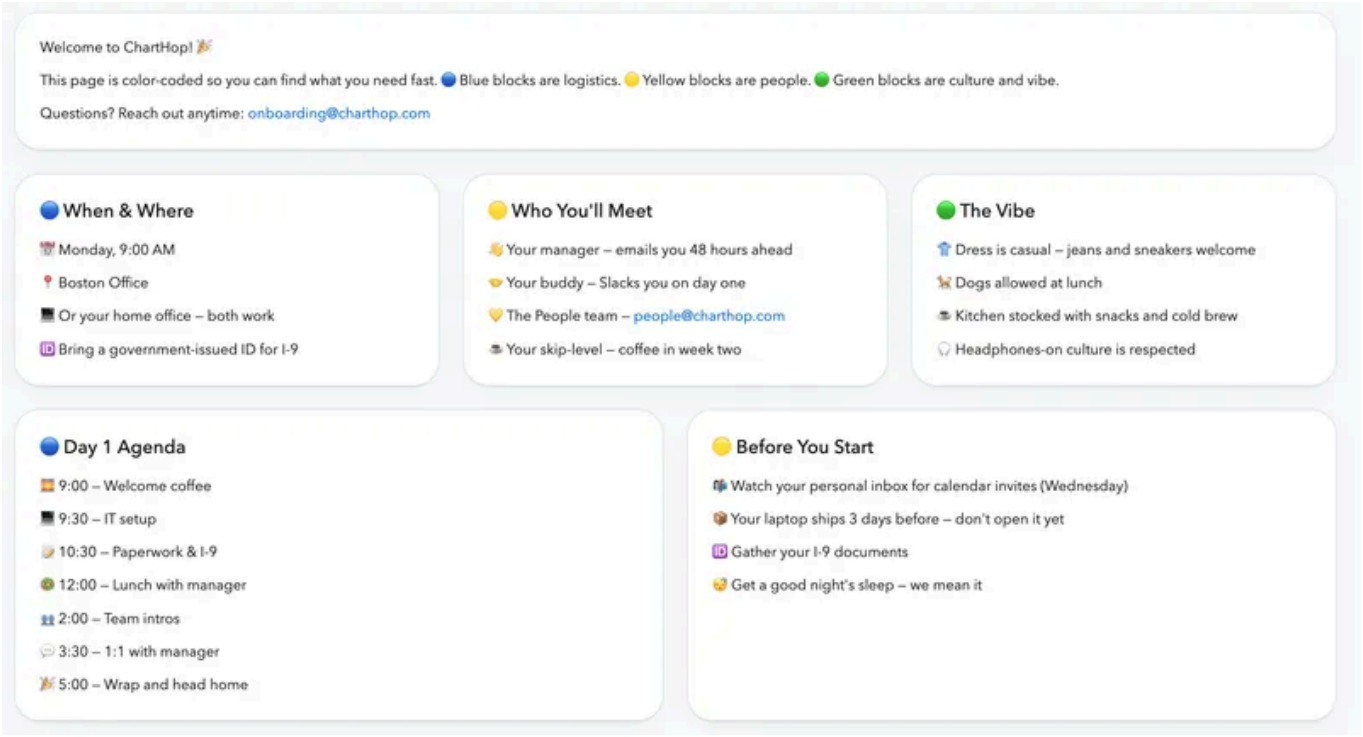
What to paste:

```
{
  "rows": [
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
```

```
              "content": "Welcome to ChartHop!  We are so excited you're
joining us.\n\nThe first few weeks are all about getting settled, meeting
your team, and learning how we work — no pressure to know everything on
day one. This page has the essentials. Bookmark it and check back
anytime.\n\nQuestions before you start? Email onboarding@charthop.com —
we're here to help."
            }
          ]
        }
      ],
      "format": "12"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " Your First Day",
              "content": "Start time: 9:00 AM\n\nLocation: Boston office
or remote — both work!\n\nBring: Government-issued ID for I-9
verification."
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " Tech Setup",
              "content": "Your laptop ships 3 days before your start
date.\n\nIT will email setup instructions to your personal address the
day before you start.\n\nStuck? Ping it@charthop.com."
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " Who to Know",
              "content": "Your manager will reach out before day one to
introduce themselves.\n\nYour onboarding buddy will message you on Slack
during week one.\n\nPeople team: people@charthop.com"
            }
```

```
          ]
        }
      ],
      "format": "4,4,4"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "Day 1 at a Glance",
              "content": "- 9:00 AM — Welcome coffee with the People team\n- 10:00 AM — IT onboarding and laptop setup\n- 11:00 AM — I-9 verification and paperwork\n- 12:00 PM — Lunch with your manager\n- 2:00 PM — Team intros and office tour\n- 3:30 PM — 1:1 with your manager\n- 4:30 PM — Wrap-up and Q&A\n\nCalendar invites land in your personal inbox the Wednesday before you start. If you don't see them, email onboarding@charthop.com."
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "Office & Dress Code",
              "content": "Boston Office is at 123 Main Street. The front desk will have your name on the list.\n\nDress code is casual — jeans, sneakers, and a comfortable shirt are the norm. Wear what makes you feel good.\n\nWorking remote? Make sure your camera works and find a quiet spot for your team intros."
            }
          ]
        }
      ],
      "format": "6,6"
    }
  ]
}
```

Example 2:



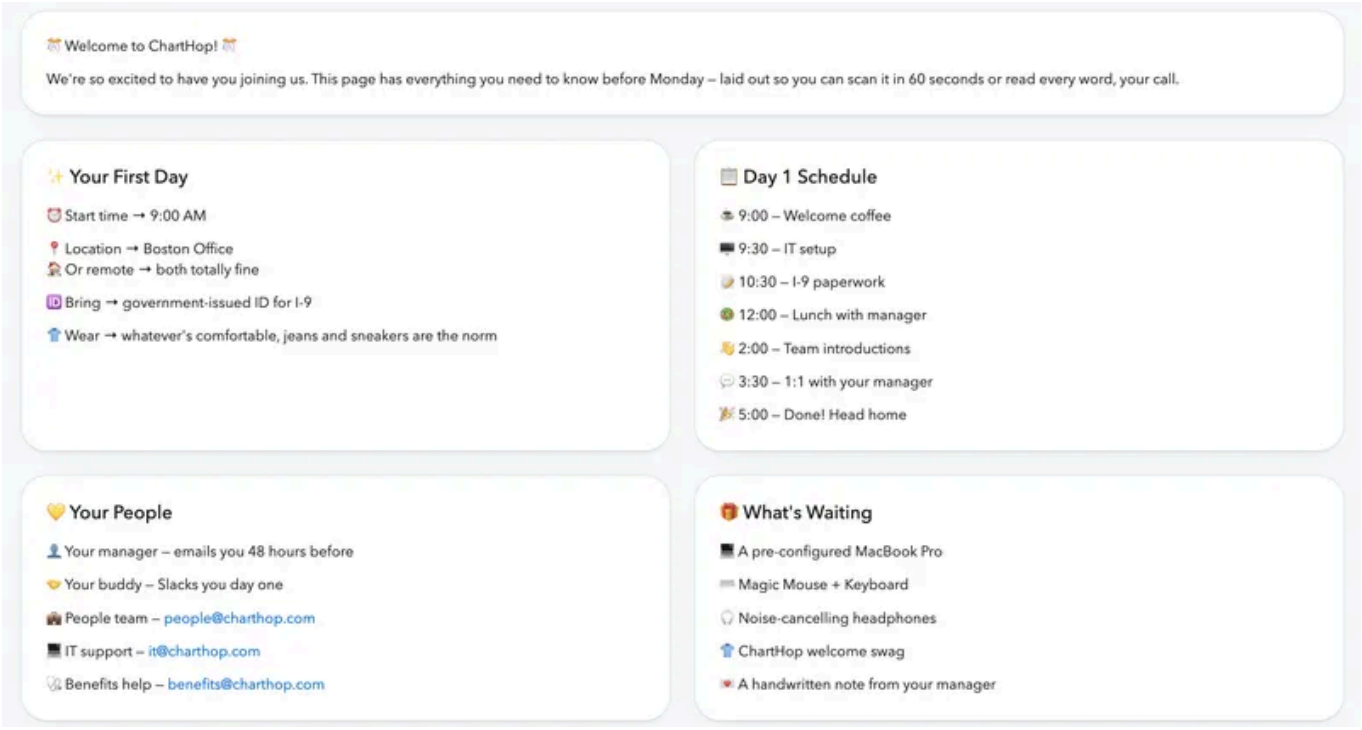
What to paste:


```
{
  "rows": [
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "content": "Welcome to ChartHop! \n\nThis page is color-
coded so you can find what you need fast.  Blue blocks are logistics.  
Yellow blocks are people.  Green blocks are culture and
vibe.\n\nQuestions? Reach out anytime: onboarding@charthop.com"
            }
          ]
        }
      ],
      "format": "12"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " When & Where",
              "content": " Monday, 9:00 AM\n\n Boston Office\n\n Or
```

```
your home office — both work\n\n Bring a government-issued ID for I-9"
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " Who You'll Meet",
              "content": " Your manager — emails you 48 hours ahead\n\n
Your buddy — Slacks you on day one\n\n The People team —
people@charthop.com\n\n Your skip-level — coffee in week two"
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " The Vibe",
              "content": " Dress is casual — jeans and sneakers
welcome\n\n Dogs allowed at lunch\n\n Kitchen stocked with snacks and
cold brew\n\n Headphones-on culture is respected"
            }
          ]
        }
      ],
      "format": "4,4,4"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": " Day 1 Agenda",
              "content": " 9:00 — Welcome coffee\n\n 9:30 — IT
setup\n\n 10:30 — Paperwork & I-9\n\n 12:00 — Lunch with manager\n\n
2:00 — Team intros\n\n 3:30 — 1:1 with manager\n\n 5:00 — Wrap and head
home"
            }
          ]
        },
        {
          "blocks": [
```

```
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "  Before You Start",
              "content": "  Watch your personal inbox for calendar
invites (Wednesday)\n\n  Your laptop ships 3 days before — don't open it
yet\n\n  Gather your I-9 documents\n\n😴 Get a good night's sleep — we
mean it"
            }
          ]
        }
      ],
      "format": "6,6"
    }
  ]
}
```

Example 3:



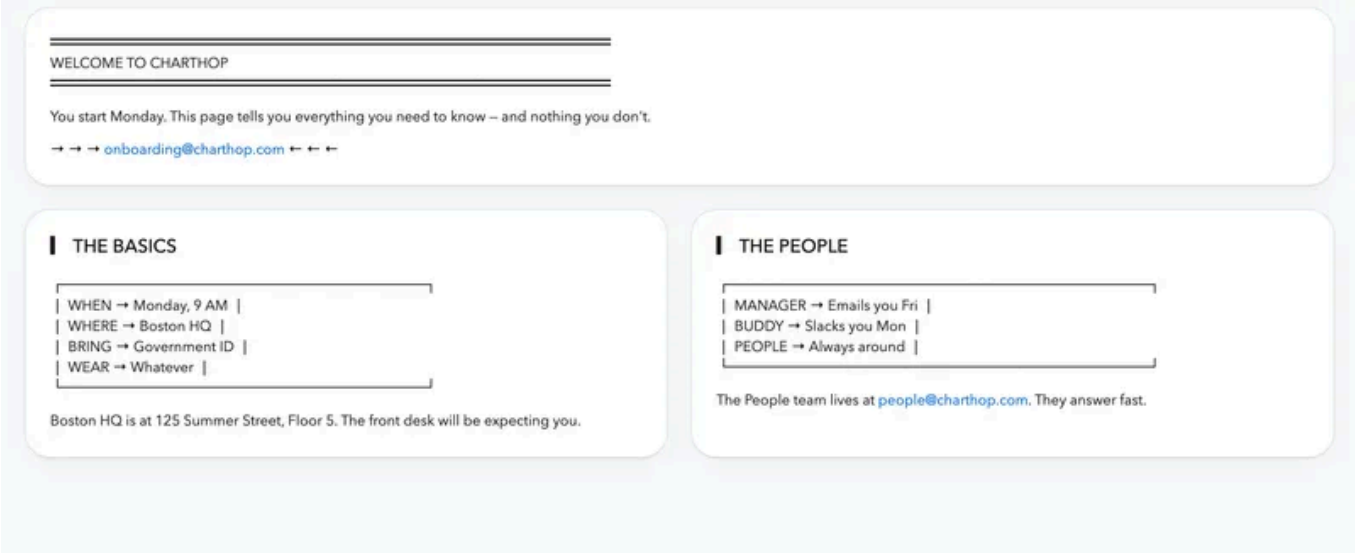
What to paste:

```
{
  "rows": [
    {
      "columns": [
        {
          "blocks": [
            {
```

```
              "type": "CONTENT",
              "content": "👋 Welcome to ChartHop! 🎉\n\nWe're so excited to have you joining us. This page has everything you need to know before Monday — laid out so you can scan it in 60 seconds or read every word, your call."
            }
          ]
        }
      ],
      "format": "12"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "✨ Your First Day",
              "content": "🕘 Start time → 9:00 AM\n\n📍 Location → Boston Office\n🏠 Or remote → both totally fine\n\n🪪 Bring → government-issued ID for I-9\n\n👕 Wear → whatever's comfortable, jeans and sneakers are the norm"
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "📅 Day 1 Schedule",
              "content": "☕ 9:00 — Welcome coffee\n\n💻 9:30 — IT setup\n\n📝 10:30 — I-9 paperwork\n\n🍽️ 12:00 — Lunch with manager\n\n🤝 2:00 — Team introductions\n\n🎯 3:30 — 1:1 with your manager\n\n🏁 5:00 — Done! Head home"
            }
          ]
        }
      ],
      "format": "6,6"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
```

```
              "height": "stretch",
              "title": "  Your People",
              "content": "  Your manager — emails you 48 hours before\n\n
  Your buddy — Slacks you day one\n\n  People team —
people@charthop.com\n\n  IT support — it@charthop.com\n\n  Benefits help
— benefits@charthop.com"
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "  What's Waiting",
              "content": "  A pre-configured MacBook Pro\n\n⌨ Magic Mouse
+ Keyboard\n\n  Noise-cancelling headphones\n\n  ChartHop welcome
swag\n\n  A handwritten note from your manager"
            }
          ]
        }
      ],
      "format": "6,6"
    }
  ]
}
```

Example 4:

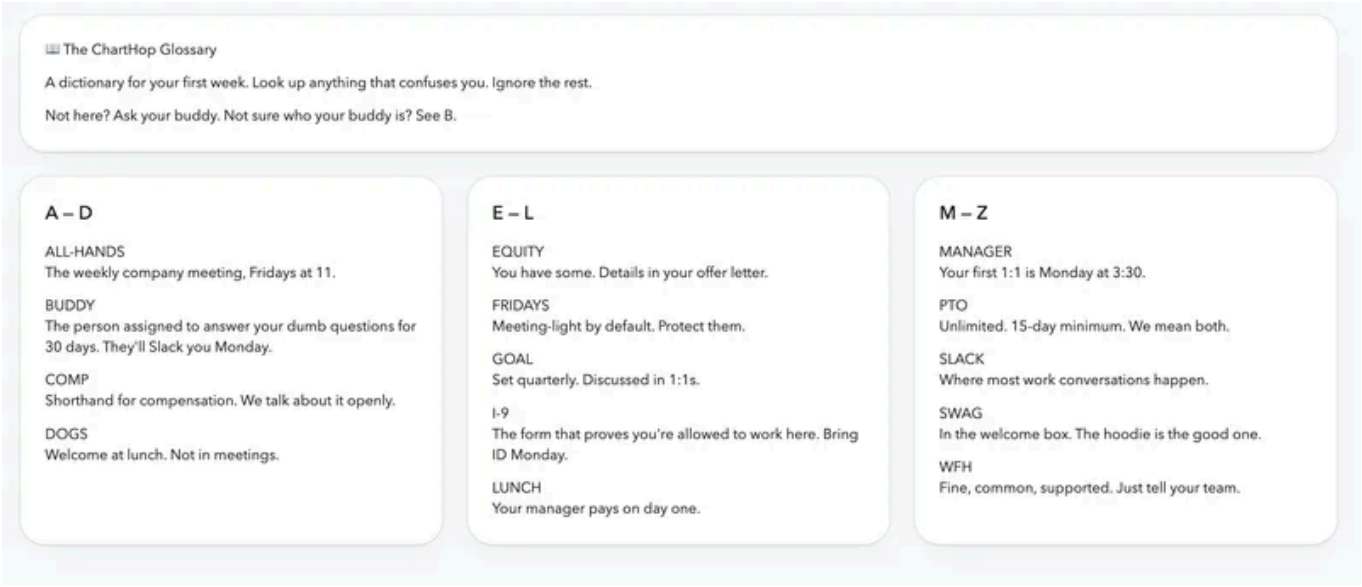


What to paste:

```
{
  "rows": [
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "content": "═══════════════════════════════════════\n
WELCOME TO CHARTHOP\n═══════════════════════════════════════\n\nYou start
Monday. This page tells you everything you need to know — and nothing you
don't.\n\n→ → →   onboarding@charthop.com   ← ← ←"
            }
          ]
        }
      ],
      "format": "12"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "▌ THE BASICS",
              "content": "┌──────────────────────────┐\n│  WHEN  →
Monday, 9 AM  │\n│  WHERE →  Boston Office     │\n│  BRING →  Government
ID │\n│  WEAR  →  Whatever       │\n└──────────────────────────┘\n\nThe
front desk will be expecting you."
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "▌ THE PEOPLE",
              "content": "┌──────────────────────────────┐\n│  MANAGER →
Emails you Fri  │\n│  BUDDY   →  Slacks you Mon  │\n│  PEOPLE  →  Always
around   │\n└──────────────────────────────┘\n\nThe People team lives at
people@charthop.com. They answer fast."
            }
          ]
        }
      ],
      "format": "6,6"
```

```
    }
  ]
}
```

Example 5:



What to paste:

```
{
  "rows": [
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "content": "📖 The ChartHop Glossary\n\nA dictionary for
your first week. Look up anything that confuses you. Ignore the
rest.\n\nNot here? Ask your buddy. Not sure who your buddy is? See B."
            }
          ]
        }
      ],
      "format": "12"
    },
    {
      "columns": [
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
```

```
              "title": "A — D",
              "content": "ALL-HANDS\nThe weekly company meeting, Fridays
at 11.\n\nBUDDY\nThe person assigned to answer your dumb questions for 30
days. They'll Slack you Monday.\n\nCOMP\nShorthand for compensation. We
talk about it openly.\n\nDOGS\nWelcome at lunch. Not in meetings."
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "E — L",
              "content": "EQUITY\nYou have some. Details in your offer
letter.\n\nFRIDAYS\nMeeting-light by default. Protect them.\n\nGOAL\nSet
quarterly. Discussed in 1:1s.\n\nI-9\nThe form that proves you're allowed
to work here. Bring ID Monday.\n\nLUNCH\nYour manager pays on day one."
            }
          ]
        },
        {
          "blocks": [
            {
              "type": "CONTENT",
              "height": "stretch",
              "title": "M — Z",
              "content": "MANAGER\nYour first 1:1 is Monday at
3:30.\n\nPTO\nUnlimited. 15-day minimum. We mean both.\n\nSLACK\nWhere
most work conversations happen.\n\nSWAG\nIn the welcome box. The hoodie
is the good one.\n\nWFH\nFine, common, supported. Just tell your team."
            }
          ]
        }
      ],
      "format": "4,4,4"
    }
  ]
}
```


Want to tweak the content?

Block types

- CONTENT

Block properties

- type — required
- title — optional, renders as a bolded heading above content
- content — the body text
- height — accepts "stretch" (matches sibling block heights) or a number like 200 (fixed pixel height)

Layout

- Format controls column widths within a row, using a 12-column grid
  - "12", "6,6", "4,4,4"
  - "3,3,3,3"

Text formatting in content

- Plain text ✅
- Line breaks via \n ✅
- Numbered lists via 1. 2. ✅
- Bullet lists via - ✅
- Emojis ✅
- Email addresses auto-link ✅

11.17. Profile Tabs V2

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

Overview

The new profile tabs allow you to design and configure the tabs to communicate key information to employees. They allow you to make ChartHop the one place that you send employees.

For example, you can create a profile tab that redirects employees to where they need to find their country-specific.

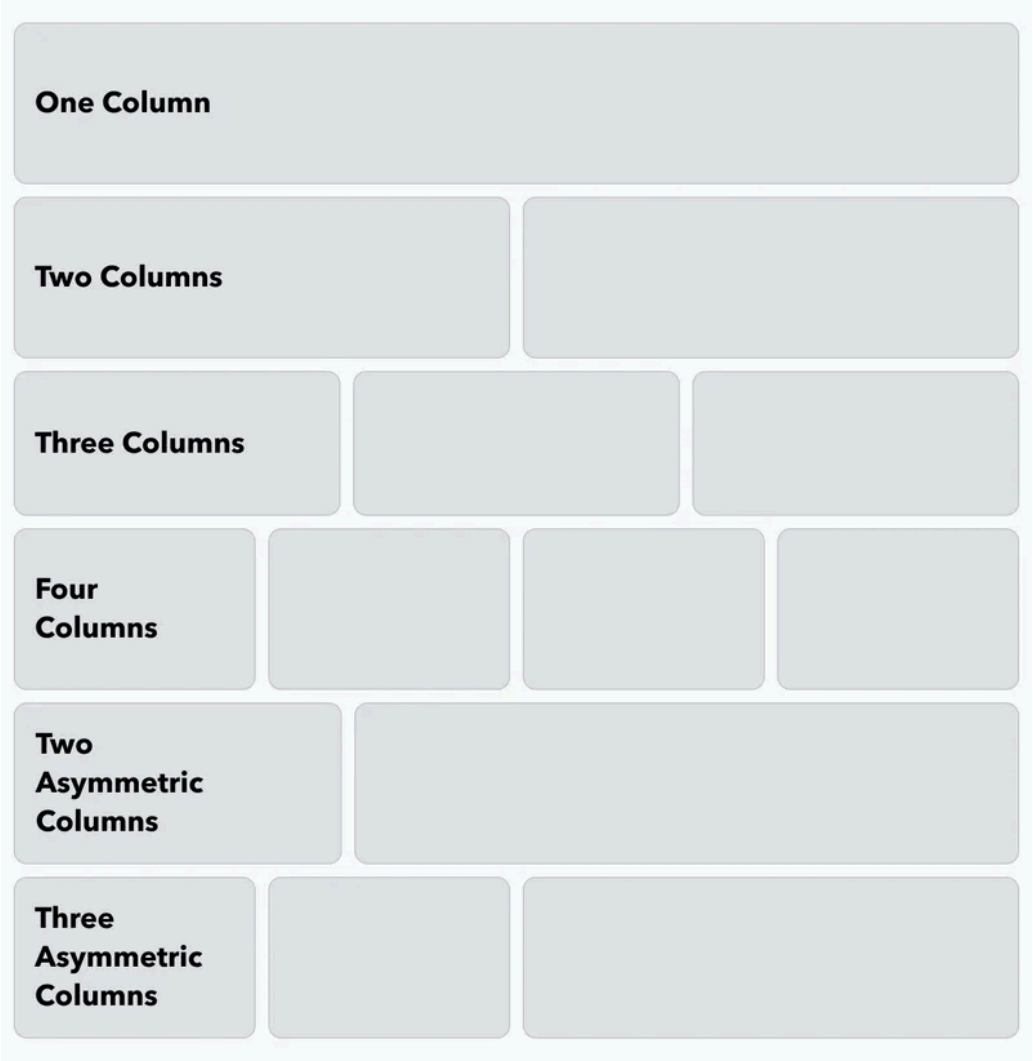
Designing your profile tab

The first thing you'll do is decide who

1. Name your profile tab - `Payroll & benefits`
2. Who's profile should it appear on? - `Everyone`
3. Who should it be displayed to? - `The person and their manager`

Layout: Columns & Rows

You have the abilty to add in rows on the tab with a set column layout and then add content into those rows.



Row layouts on profile tabs

Blocks

You are add in 3 types of blocks into columns:

Content Blocks

The content blocks are great ways to showcase any information

- **Header**
- **Text** - Add the details of all of the text
- **Primary Button** - Can be to any external or specific form link.
- **Secondary Button** - Can be to any external or specific form link.

Tasks

The same tasks block that shows on the home page.

Additional configuration coming in the future.

Calendar

The same "This week" calendar block that shows on the home page.

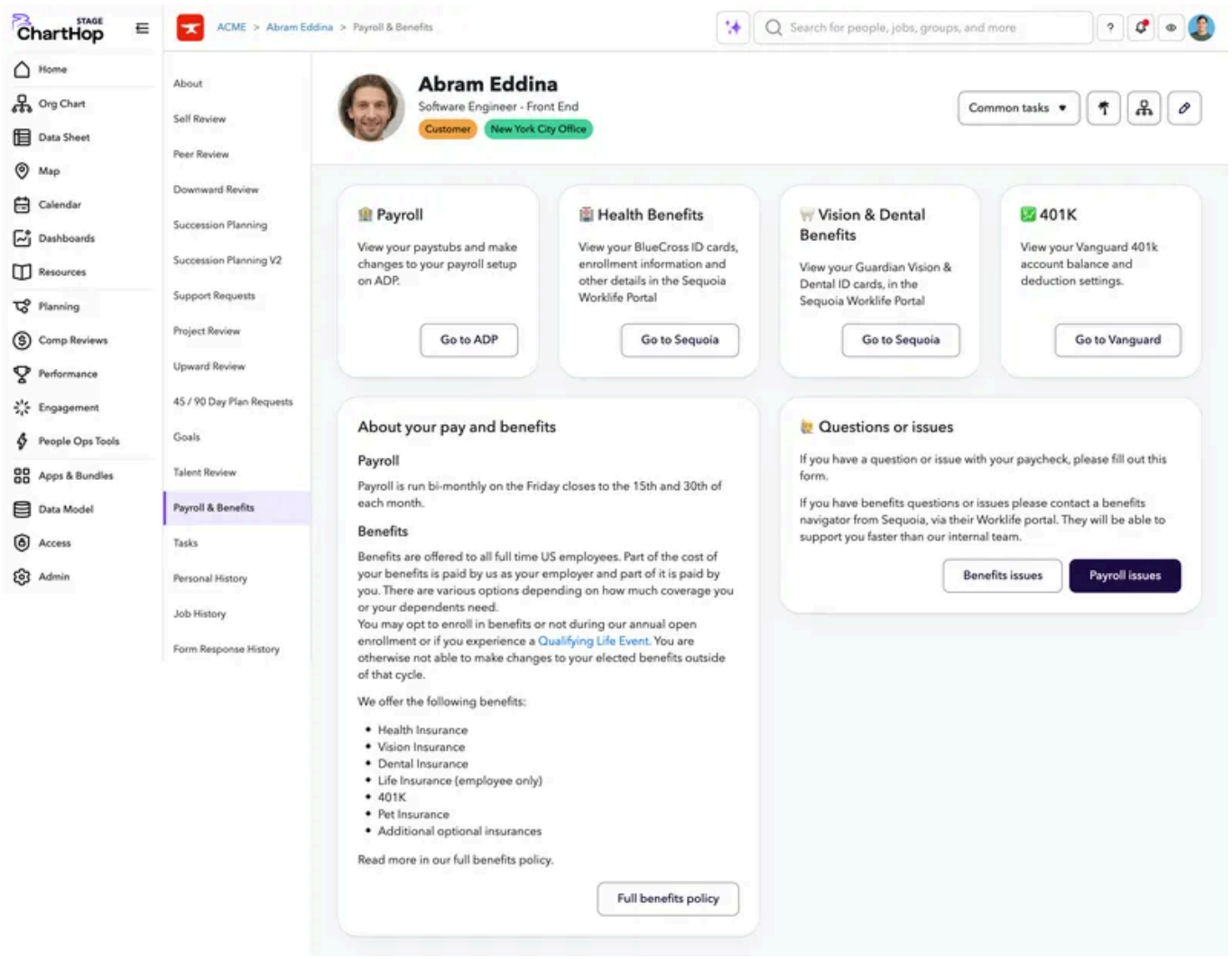
Additional configuration coming in the future.

Examples

Payroll and Benefits Tab

For example, this tab has 2 rows: One with four columns, One with two columns.

This payroll and benefits tab can be **downloaded as a bundle**.



11.18. Refreshed Profile Page

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

How to add your branding

To update your organization's branding:

1. Navigate to the **Admin > General**
2. Find the **Branding** header
3. Add in your brand colors and logos

If you want to find your company's branding, we recommend you:

1. Check your intranet, internal resources or your marketing team.
    1. Ask for *"A brand backround color and a logo that would look good on top of that color. For example, a dark purple background and a white logo."*
2. Check your company website for a brand guidenlines page.
3. Check your company LinkedIn or social media page for square logos. Right-click and "Save image as" then upload that image.
4. Search for your company on **Brandfetch**.

Branding recommendations

Primary brand color — This will be used as a background on the home page and mobile app. We suggest selecting a brand color that is darker and will look good as a compliment to your logo.

Secondary brand color — This color is currently not used by default, but more options of how to use this color will come in the future.

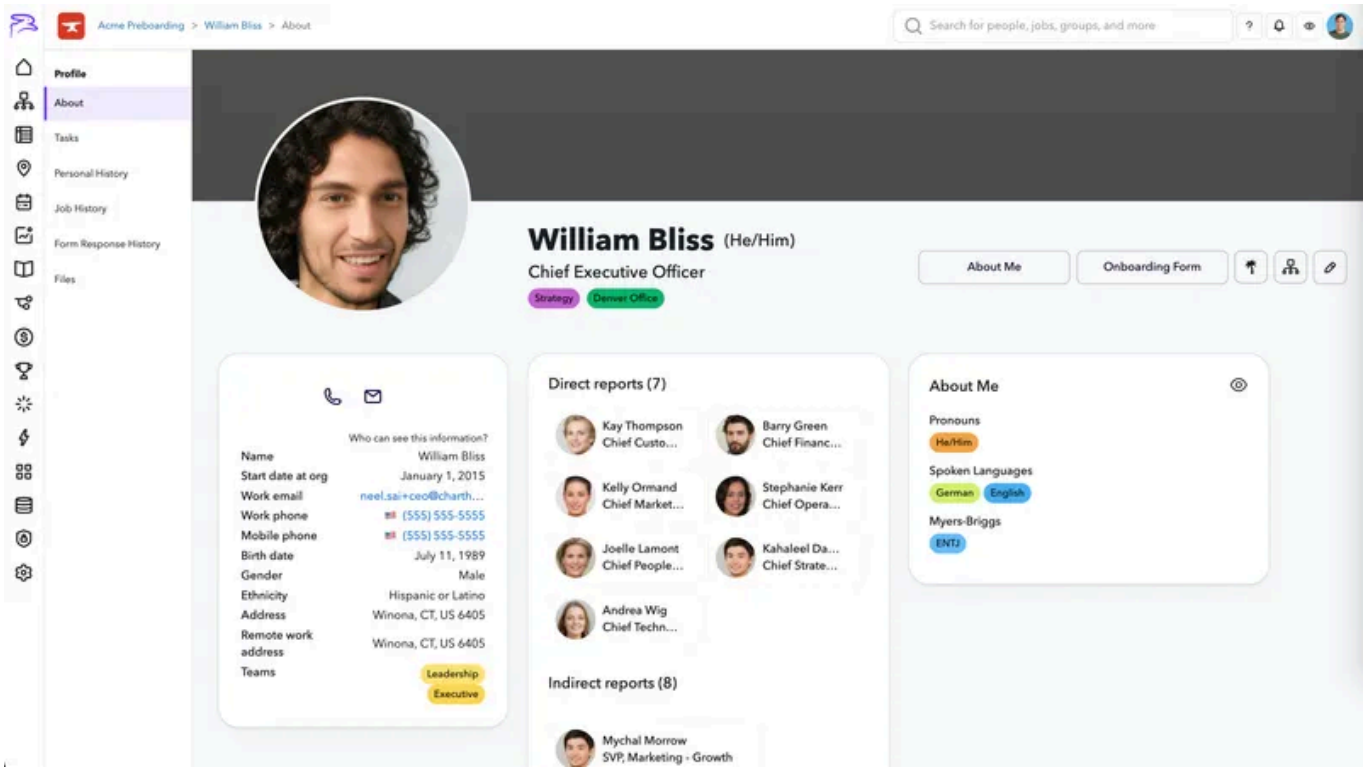
Square logo — This logo will appear in the top right corner of your ChartHop account and many other places. We suggest you add a logo where a color other than white takes up the entire square. Circular logos or logos with clear backgrounds are not recommend.

Horizontal logo — This logo will primarily be used set against your primary brand color so make sure they work together well. We recommend a logo with a transparent background. For example, the white ChartHop logo set against dark purple.

How to add branding to the profile page

After you have added your branding in settings, you will want to turn on the **Refreshed Profile** toggle in **Admin > Labs**.

Profile Example



11.19. Redesigned User Management Settings

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

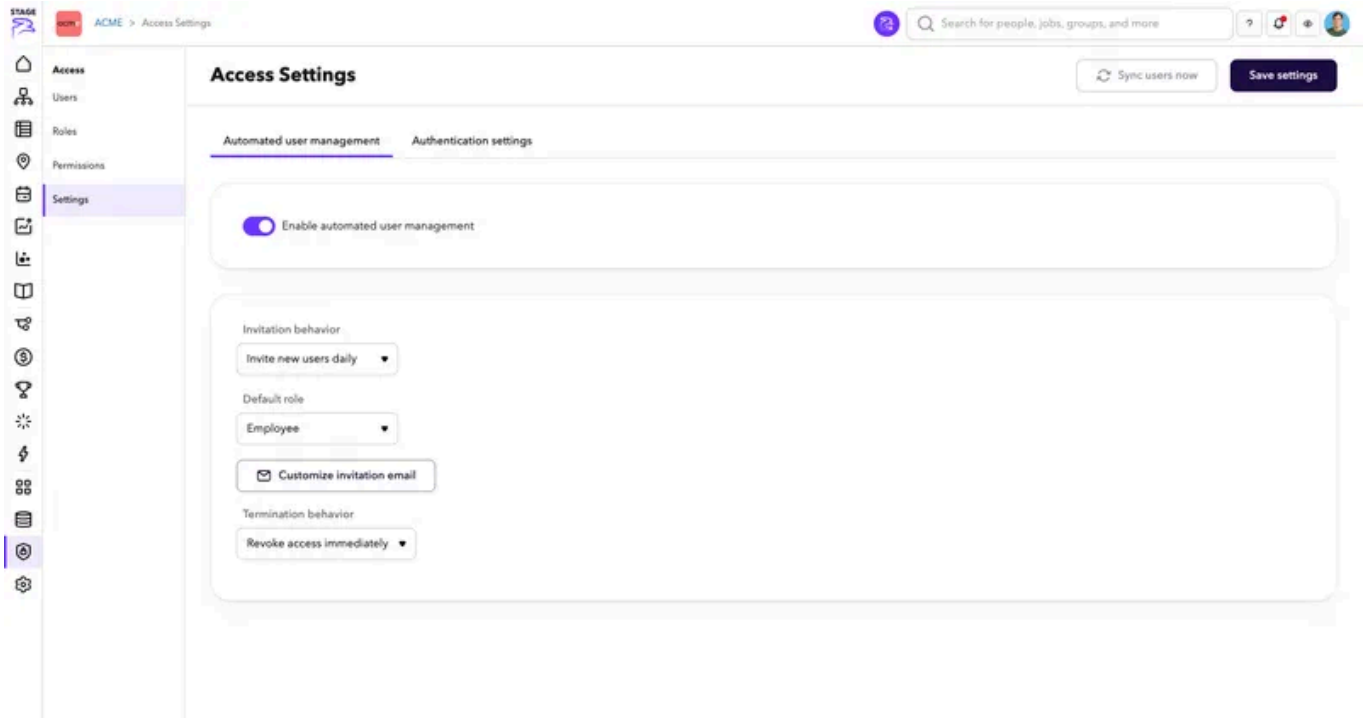
1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

What's new

The options in **User management settings** have been redesigned to make them simpler and clearer to understand.

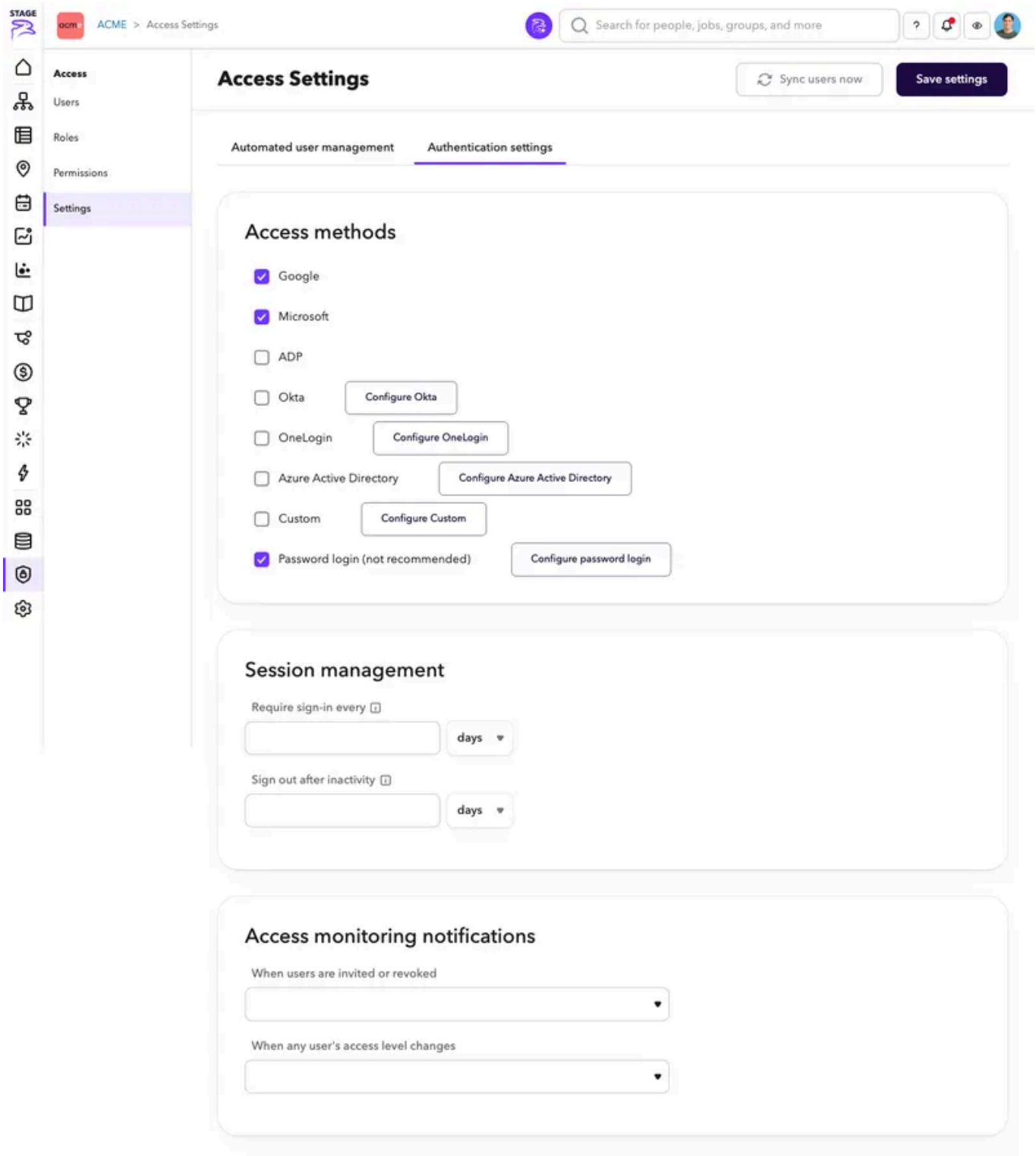
Automated user management

This tab contains controls for automatically inviting and revoking user access.



Authentication Settings

This tab contains setting for access methods, sessions and notifications.



11.20. Salesforce Integration

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Overview

Bring your CRM and other company data into ChartHop with our Salesforce Integration. This integration allows you to pull key data—such as account details, contact information, and pipeline status—directly from Salesforce into your ChartHop account.

Places to utilize data from Google Sheets:

- Tables
- Home Page
- Profile Tabs
- Dashboards
- Forms (Text blocks)
- Resource Pages
- Letter Templates

Setup instructions

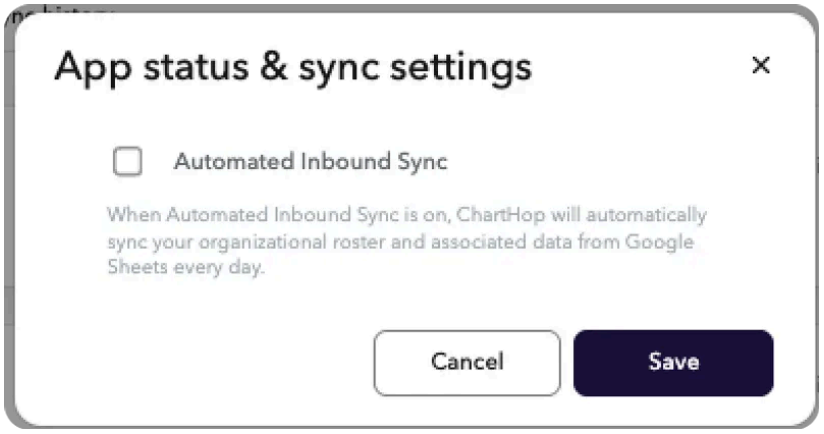
Installing the application

In Labs, enable "Alpha apps and integrations." You will then see "Salesforce" display on the apps page under the tab "Other available apps." Once you click install, it will guide you to

connect your Salesforce account so we can access the data in your Salesforce account. Once installed, you can rename the application to better match the data you are pulling in. ChartHop cannot access data that you have not explicitly mapped to ChartHop tables or fields.
ChartHop cannot access data that you have not explicitly mapped to ChartHop tables or fields.

Sync frequency

You can choose to automate this sync and have it run daily, or you can manually run it at your discretion.



Sync options

Mapping to a table in ChartHop

Note: The table needs to be created first in ChartHop before you can map to it.

All values must match EXACTLY, including any trailing white spaces. If there is a space, dash, or non alphabet character in the name, wrap the name in `[""]`. You **CAN** wrap any value in the brackets and quotes.

To map to a column in a table, you need to know the table code name (see below), and the field code name for the column.

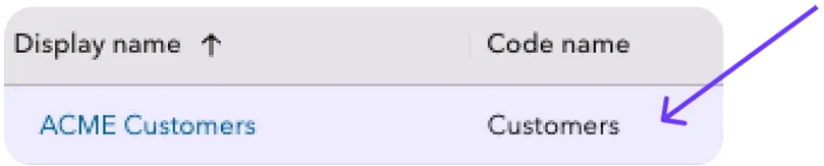
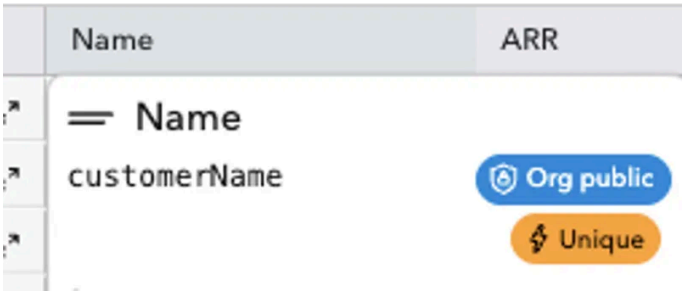


Table code name



Field code name for column

You can map columns from different objects in Salesforce. You need to know the name of the object and the name of the field. The first field mapped needs to be the unique field. This is a value that does not repeat in its column, and is typically the Salesforce ID for the object (e.g., `Id, Contact.Id`).

In this example, the Salesforce object is labeled `Account`, and the fields we want to map are `AccountID` and `Name`.

Inbound field mapping example

ChartHop Table	Salesforce object and field
`Customers.SFId` (this column is marked as `unique` in the table)	`["Account"].["Account.id"]`
`Customers.customerName`	`["Account"].["account.name"]`

- The first field mapped needs to be the unique field. This is a value that does not repeat in its column, and can be as simple as `row number`.
- Notice above how the values are wrapped in brackets and quotes. Any field with more than 1 word or special characters MUST be wrapped in those values to be read by ChartHop. However, you can wrap any other values for consistency.

Once all of your field mappers are set, you can click "save mappers" and run the sync.

Salesforce Integration access

Initially, only Owners have the ability to install and edit the Salesforce App.

Fields synced from Salesforce utilize ChartHop's **field settings**, so anyone in the organization can be given access to view the data in the corresponding fields.

11.21. Tables

> This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.
>
> ### How to setup a Alpha Feature
>
> 1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
> 2. Read below for setup instructions and context on how the feature will work.

Overview

Business Tables let you store and manage custom structured data in ChartHop — independent of employee or job records. Common use cases include tracking sales targets, headcount plans, cost centers, events, or any org-specific dataset.

Places to utilize data from Tables

- Home Page
- Profile Tabs
- Dashboards
- Forms (Text blocks)
- Resource Pages
- Letter Templates

Tables access

Initially only Owners have the ability to create Tables.

Tables utilize ChartHop's **share access** , so anyone in the organization can be given access to table to edit or view a specific table.

Creating a Table

1 Navigate to **Tables** in the left navigation.

2 Click the **Create** button in the top right corner.

3 In the **Create Table** dialog, fill in:

- **Code name** — A programmatic identifier used in formulas and the API (e.g., salesTargets). No spaces; use camelCase.
- **Display name** — The human-readable name shown in the UI (e.g., Sales Targets).

4 Click **Save**. The table is created and opens to an empty state.

The table list shows all tables with their display name, code name, row count, creator, last modifier, creation date, last modified date, and who it's shared with. Use the **Filter by name** search to find tables quickly.

Creating Columns

A new table starts empty. You must define at least one column before adding or importing data.

- From the empty table view, click **Create column**.
- Fill in the **Create column** form:

Field	Description
Label	The display name for the column header.
Field code	The programmatic identifier used in formulas and the API.
Description	Optional. Explains what this column stores.
Category	Groups the column for organizational purposes. Defaults to *Uncategorized*.
Sensitivity	Controls visibility. *Org Public* = visible to everyone in the org; not shared outside.
Data type	The type of value stored (e.g., Short text, Number, Date, Currency). See data types below.
Unique	Marks this column as the unique identifier for each row. **Required on the first column.**
Track changes over time	Enables historical tracking for this column's values.
Expire after	Optional. Number of days after which a row's value in this column expires.

- Click **Save**. Repeat to add additional columns.

Important: The first column of every table must have **Unique** checked. This column acts as the primary key — each row must have a distinct value in this field. This is required for data imports and row matching to work correctly.

Column Data Types

Business Table columns support the same data types as ChartHop fields, but are not tied to employee or job records. Available types include:

- Short text
- Long text
- Number
- Currency (money)
- Percent

- Date
- Boolean
- Enum (single or multi-select)

Importing Data from a Spreadsheet

Once your columns are defined, you can populate the table by importing a CSV or spreadsheet file.

1 Open the table you want to populate.

2 Click the **download/import icon** in the top right of the table view to open the export/import menu.

3 Select **Import table from spreadsheet**.

4 Upload your file. Column headers in the spreadsheet should match the field codes or labels of your table columns.

5 Review and confirm the import mapping, then complete the import.

Tips for a clean import:

- Ensure your spreadsheet has a column matching the **unique** column — this is how ChartHop identifies and deduplicates rows.
- Column headers should match your table's field codes exactly (case-sensitive).
- Remove any summary rows, merged cells, or extra header rows before importing.

Other Import/Export Options

Option	Description
Export to CSV	Downloads the current table data as a CSV file.
Sync to Excel/Sheets	Syncs the table to a connected Excel or Google Sheets document.
Import table from spreadsheet	Uploads a spreadsheet file to populate or update the table.
Sync from business data	Sync from Zendesk, Google Sheets, Salesforce and more!

Maintaining a Table

Editing Table Structure

- Click the **pencil (edit) icon** in the top right of the table to edit table settings or column definitions.
- Add new columns at any time using the **Create column** button.
- Column data types and unique settings can be modified after creation, but changing the unique column may affect existing row matching.

Editing Data

- Rows can be edited inline directly in the table view.
- Use **Import table from spreadsheet** to bulk-update rows — rows matching on the unique column will be updated; new rows will be added.
- Use **Export to CSV** to pull data, edit it externally, and re-import.

Filtering and Finding Tables

- From the Tables list, use the **Filter by name** search bar to find tables by display name.
- Tables are sorted by display name by default. Click any column header to re-sort.

Sharing Access

The **Shared with** column on the Tables list shows which users or groups currently have access to each table.

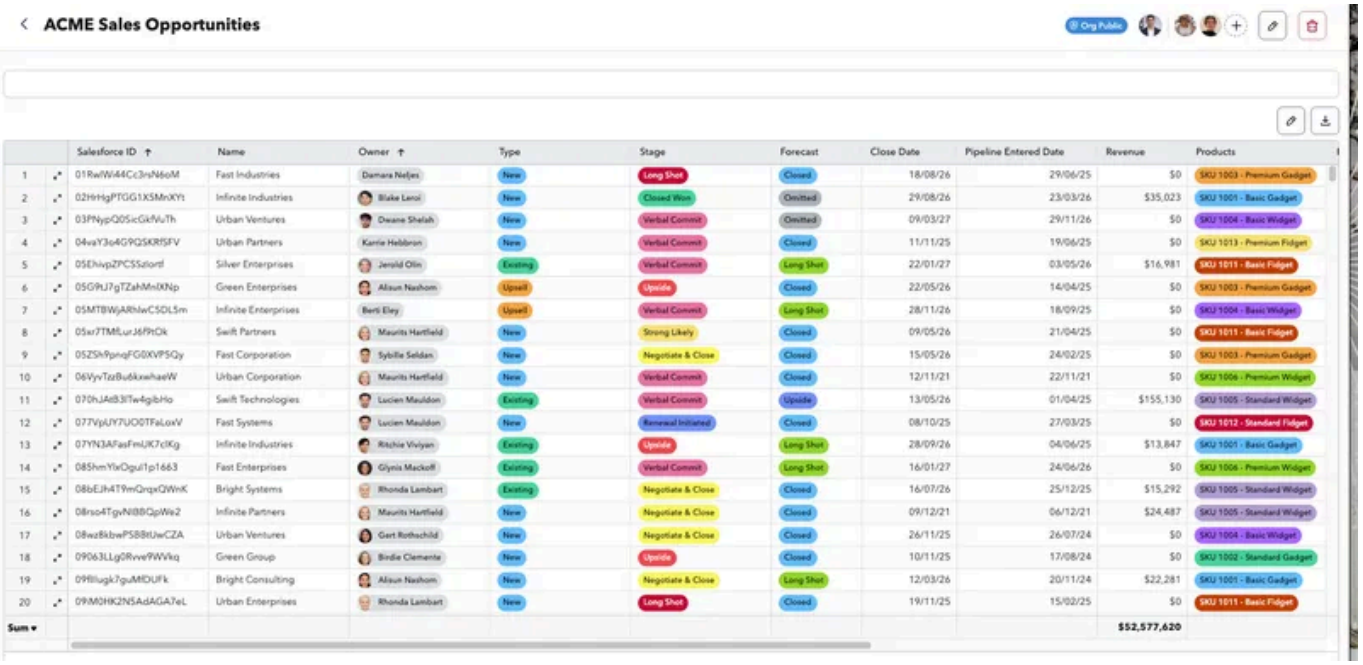
To share a table:

- Open the table.
- Click the **share/link icon** or access sharing settings via the table edit menu.
- Add users or groups who should have access.

Column-level sensitivity settings also control visibility. A column set to **Org Public** is visible to all org members with table access, but is not shared outside the organization. Adjust sensitivity per column if certain fields (e.g., salary bands) should be restricted to specific roles.

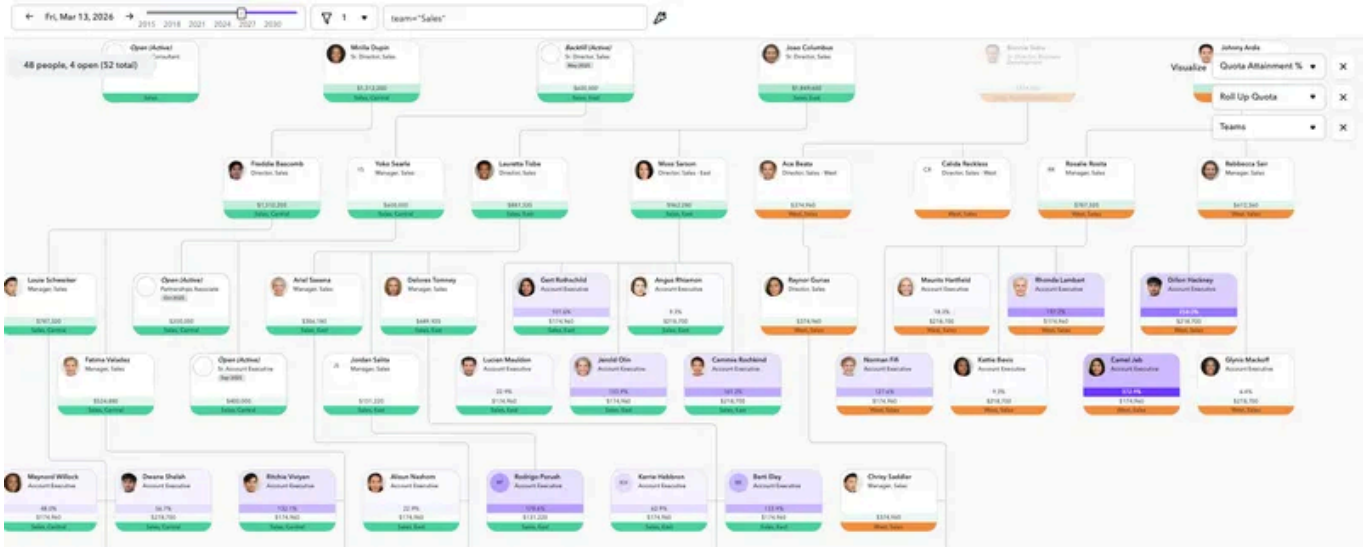
Examples of how data from tables are used

Example Salesforce data in a table



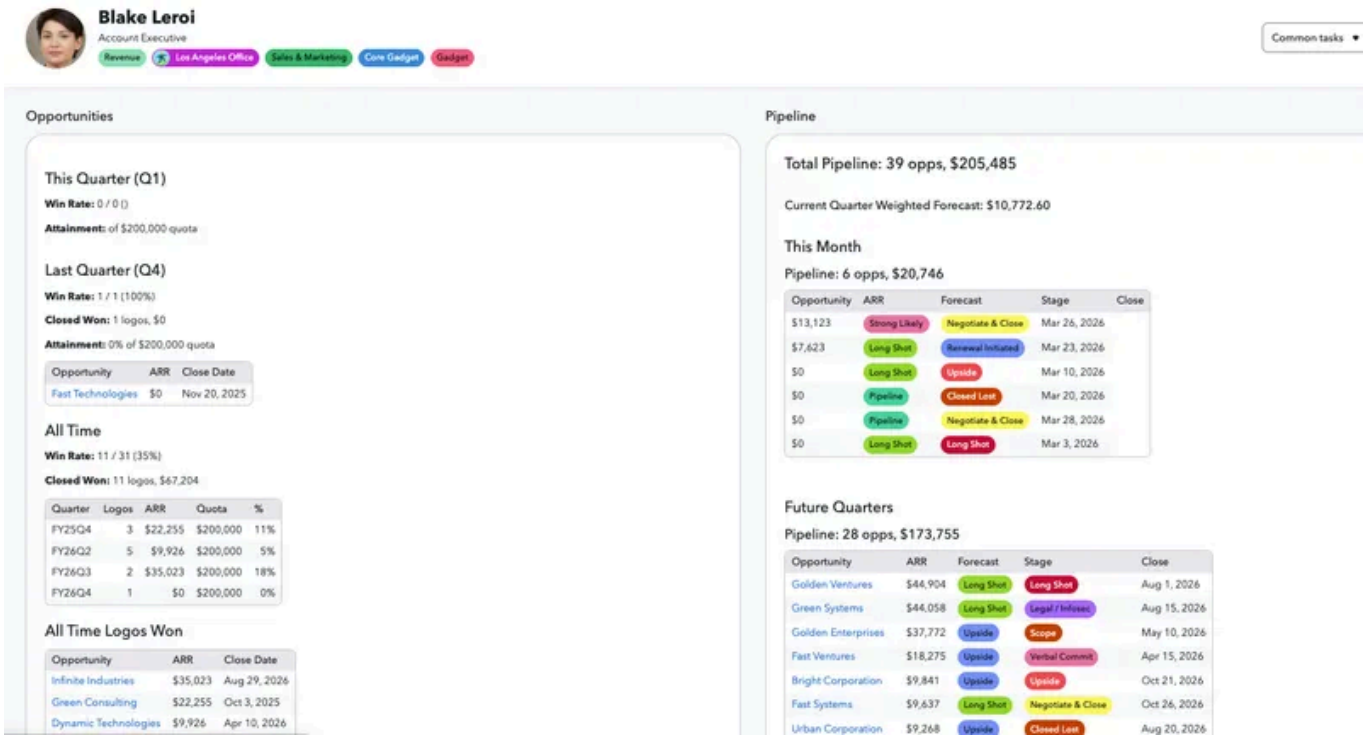
salesforce data in a table

Once data is in a table in ChartHop, it can be referenced throughout the platform, like in the org chart:



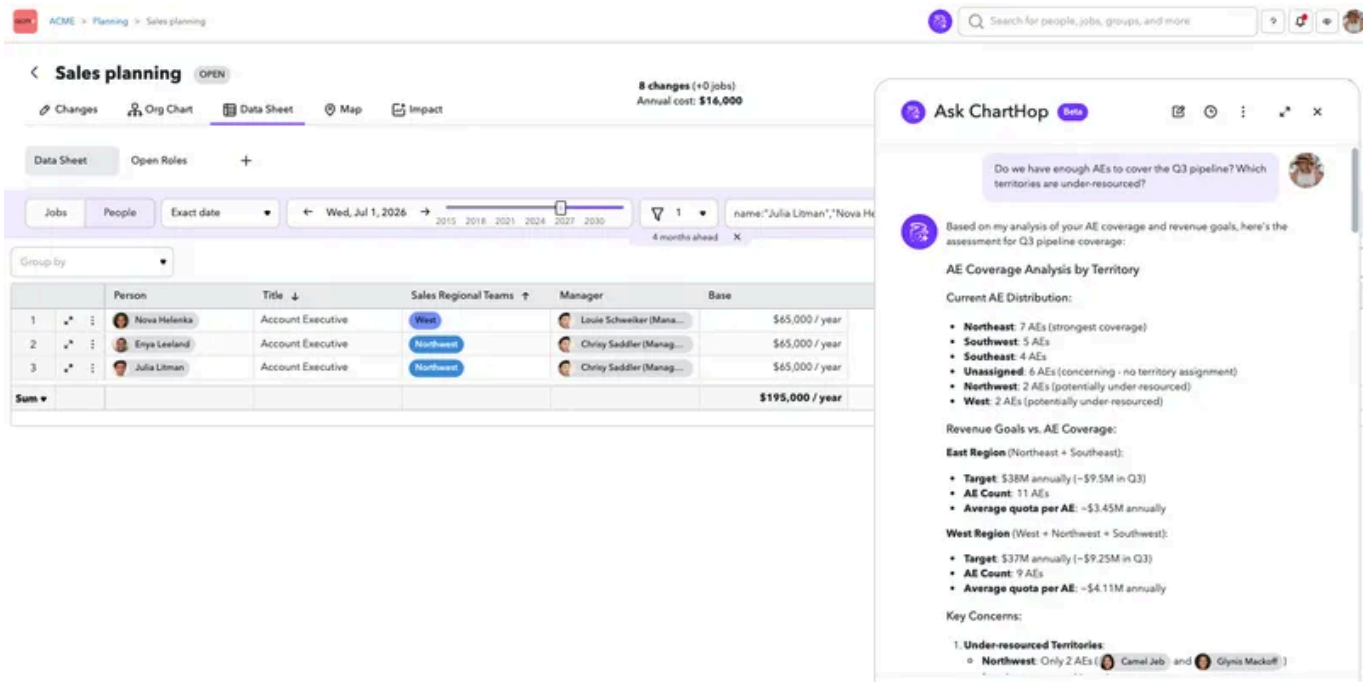
quote attainment in the org chart

Or in profile tabs:



Profile tab for sales team member

ChartHop is more powerful with more data is has access to- leveraging AI can help you make decisions faster. With Salesforce and Zendesk data paired with people data, Charthop AI can help you make a scenario to forecast new headcount based on pipeline growth proactively- and THAT is the power of data.



Scenario created based on salesforce data

Based on my analysis of the sales team data and pipeline information, here are the territories with the **highest pipeline but lowest headcount coverage**:

11.21.1. Leveraging table data

Sales Profile Tab: Setup Guide with Salesforce

This profile tab displays a rep's sales performance — win rates, closed ARR, and quota attainment — pulled live from an `opportunity` table.

Prerequisites

Opportunity Table

You need a table named `opportunity` in your ChartHop account with the following fields:

Field	Type	Description
`owner`	Person	The rep who owns the opportunity
`name`	Text	Opportunity/company name
`stage`	Text	Deal stage (e.g. "Closed Won", "Closed Lost")
`arr`	Currency/ Number	Annual Recurring Revenue
`closeDate`	Date	Expected or actual close date
`contractStartDate`	Date	Optional. When the contract starts; used as the primary close date for attainment calculations, falls back to `closeDate`

Closed Stage Convention

The template uses `stage:closed` to find all closed deals regardless of outcome (won or lost). Make sure your closed stages are tagged or named consistently so this filter works. Deals with `stage="Closed Won"` are counted separately for win rate.

Quota Field on the Person

Each rep must have a `quota` field on their person record. This is used for attainment calculations. The template uses `asOf()` to look up what their quota was in a past quarter.

What It Shows

- **This Quarter** — Win rate, closed won logo count and ARR, and quota attainment for the current fiscal quarter.
- **Last Quarter** — Same metrics for the previous fiscal quarter, using `asOf()` to retrieve the rep's quota at that time.
- **All Time by Quarter** — A summary table of logos won, ARR, quota, and attainment % for every quarter with at least one closed won deal.
- **All Time Logos Won** — A full list of every closed won deal, sorted by ARR descending.

How to Add the Tab

1. In ChartHop, go to **Profile** settings and create a new custom tab.
2. Set the tab to use a **Rich Text / Template** field type.
3. Paste the template code into the editor.
4. Customize as needed (see below).

Customization

Deal links

All opportunity names link to a shared Google Sheet. To update the destination, replace the URL directly in the template:

```
<a href="YOUR_GOOGLE_SHEET_URL">{{opp.name}}</a>
```

Extend the quarter date list

The all-time quarterly breakdown uses a hardcoded array of quarter start dates. Add futu

```
{% assign quarterDates = ['2019-07-01', ..., '2027-04-01'] %}
```

Each date should be the first day of a fiscal quarter.

Change the closed stage filter

If your closed stages use different naming, update the stage:closed filter. To use explic

```
table.opportunity.find{owner=person and (stage="Closed Won" or stage="Closed Lost") and
```

Use contractStartDate vs closeDate

The template prefers contractStartDate for quarterly bucketing and falls back to closeDa

```
(contractStartDate ?: closeDate) >= fiscalQuarterStart()
```

If your team only tracks closeDate, you can simplify to just closeDate throughout.

Key Template Functions

Function	What it does
`fiscalQuarter()`	Returns the current fiscal quarter number
`fiscalQuarterStart()` / `fiscalQuarterEnd()`	Start and end dates of a fiscal quarter
`date("-3m")`	A date 3 months in the past
`asOf(date, { field })`	Returns the value of a field as it was on a
`table.opportunity.find{...}`	Queries the opportunity table with filters
`.count()` / `.sum{field}`	Aggregates on a result set
`.sortDesc{field}`	Sorts results by a field descending
`formatPercent()` / `formatDate()`	Formatting helpers

11.22. Team-based Org Chart

This feature is currently in Beta.

We're really excited about it and it's already being used by multiple organizations.

Try it out and send feedback to the ChartHop team or directly to **product-feedback@charthop.com**.

How to setup a Beta Feature

1. From the left sidebar, select **Admin,** then select **Labs**.
2. Use the switch to toggle on the feature, then press the **Save settings** button.
3. Read below for additional setup instructions and context about what will be activated when you save settings.

Activating this feature will show the groups org charts in your org as soon as you save the setting in labs. We recommend that you **revise your groups data** before turning this option on.

Rollout process

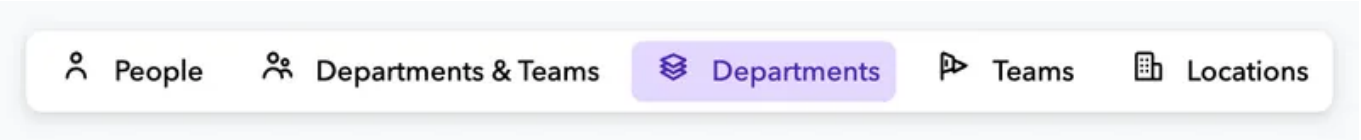
We suggest that you follow the following rollout process:

1. Add the people who will be setting up the view in the box labeled **Limit which users can see the team-based org chart.** The view will then only be visible to thse people
2. Preview the data, determine your uses cases and plan your setup.
3. Clean up or update any of group data.
4. Remove the user limitation and release the view to your the whole org!



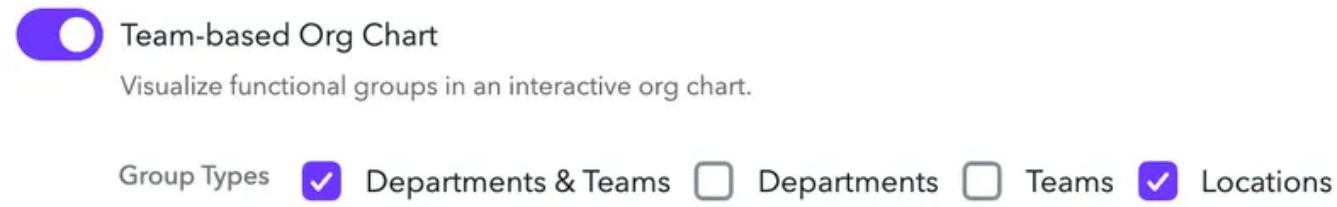
Select group types to visualize

ChartHop allows you to visualize your Department & Team Together, Departments, Teams, or Locations on the org chart.



Org chart type switcher

After turning on the option, select which group types you want to display.



Revise your groups data

They group org chart works best when you configure it with data that make sense to your organization. In particular we recommend 2 actions:

- Add **Parent Groups** to organize your Departments or Teams. A few tips:
  - Use the **Departments and Teams** view — Use Departments for your to level grouping then nest sub-groups under that. For example:
    - Customer Department
      - Customer Support Team
      - Implementation Team
      - Customer Success Team
      - Professional Services Team
  - Create **Teams** that only act as team Parents. Maybe you have a setup like this:
    - "Product Teams" Team — Organizational parent group
      - "iOS Team" — Actual team
      - "Android Team" — Actual team
      - "Mac OS Team" — Actual team
      - "Windows Team" — Actual team
    - "Sales" Team — Parent Group with Sales Leadership

        - "East Coast" — Actual team
        - "Midwest" — Actual team
        - "Southeast" — Actual team
        - "West Coast" — Actual team
- Revise the **names** of your groups to be more "Public-facing" rather than "Admin-facing."
    - If you are syncing your team names in from another system, make sure to add the name in the source system as an `alias` to ensure that group syncing continues to work properly.

To edit your group data:

1. From the left sidebar, select **Data Model,** then **Department, Team or Location.**
2. Select a group using the checkbox, then select **Edit** from the list of actions.
3. From the **Edit group** drawer, you can update the name, add a parent group, and more.

More information can be found in **Managing groups**.

Deleting Groups

We know that a big part of cleaning up your groups data may involve deleting groups. A few things to note:

- If you are syncing groups from your payroll system, you will want to first make updates to the groups in the payroll system.
- If you want to delete a group, you must first remove all of the members of the group.
- If you delete a group, historical data on the job history is preserved.

Synced Groups

If groups are synced from a payroll system and you want to make revise the display of your data, here are a few things to keep in mind:

- Make updates to the groups in the payroll system first
- If you want to update the name in ChartHop, be sure to add the name in the payroll system as an `alias` on the group to ensure that group syncing continues to work properly.

- Make sure the groups are empty in the payroll system before deleting them in ChartHop or they will be recreated with the next sync.

11.23. Zendesk Integration

This feature is currently in Alpha. Be one of the first customers to try it! Please share any feedback with the ChartHop team.

How to setup a Alpha Feature

1. Contact **ChartHop support** or your CSM if you have one. They can activate the feature for you.
2. Read below for setup instructions and context on how the feature will work.

Overview

Bring your customer support data and other company data into ChartHop with our Zendesk Integration. This integration allows you to pull key data—such as ticket status, requester details, and satisfaction ratings—directly from Zendesk into your ChartHop account.

Places to utilize data from Google Sheets:

- Tables
- Home Page
- Profile Tabs
- Dashboards
- Forms (Text blocks)
- Resource Pages
- Letter Templates

Setup instructions

Installing the application

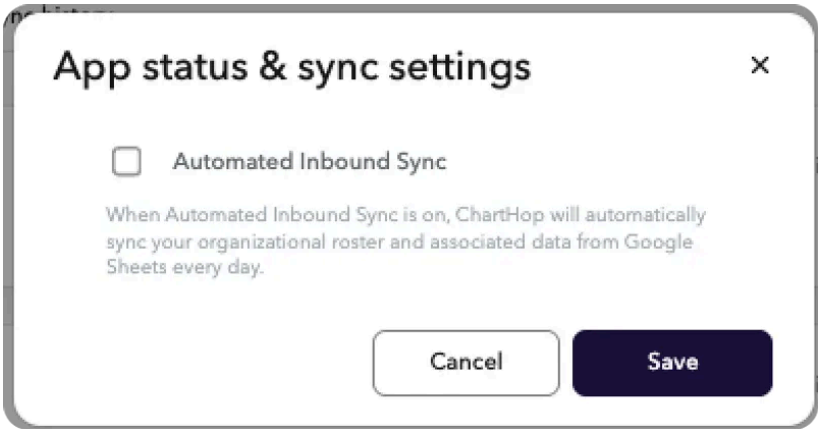
In Labs, enable "Alpha apps and integrations." You will then see "Salesforce" display on the apps page under the tab "Other available apps." Once you click install, it will guide you to

connect your Zendesk account so we can access the data in your objects. Once installed, you can rename the application to better match the data you are pulling in. ChartHop cannot access data that you have not explicitly mapped to ChartHop tables or fields.

ChartHop cannot access data that you have not explicitly mapped to ChartHop tables or fields.

Sync frequency

You can choose to automate this sync and have it run daily, or you can manually run it at your discretion.



Sync options

Mapping to a table in ChartHop

Note: The table needs to be created first in ChartHop before you can map to it.

All values must match EXACTLY, including any trailing white spaces. If there is a space, dash, or non alphabet character in the name, wrap the name in `[""]`. You **CAN** wrap any value in the brackets and quotes.

To map to a column in a table, you need to know the table code name (see below), and the field code name for the column.

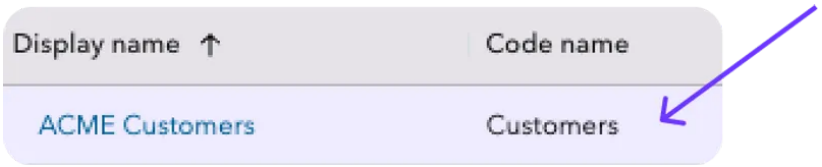
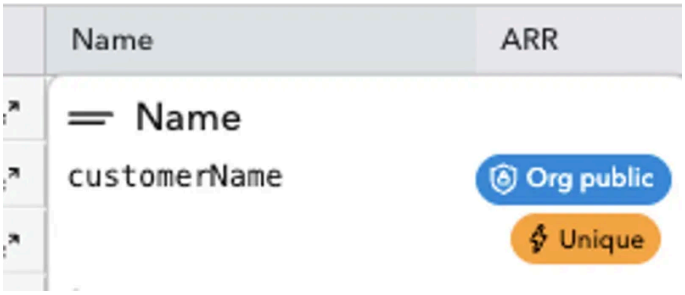


Table code name



Field code name for column

You can map fields from different objects within Zendesk. You need to know the name of the object and the name of the field.

In this example, the Zendesk object is `Tickets`, and the fields we want to map are `TicketID` and `Subject`.

Inbound field mapping example

ChartHop Table	Zendesk object and field
`SupportTickets.ticketId` (this column is marked as `unique` in the table)	`["Tickets.id"]`
`SupportTickets.ticketSubject`	`"Tickets.Subject"`

- The first field mapped needs to be the unique field. This is a value that does not repeat in its column, and can be as simple as `row number`.
- Notice above how the values are wrapped in brackets and quotes. Any field with more than 1 word or special characters MUST be wrapped in those values to be read by ChartHop. However, you can wrap any other values for consistency.

Once all of your field mappers are set, you can click "save mappers" and run the sync.

Salesforce Integration access

Initially, only Owners have the ability to install and edit the Zendesk App.

Fields synced from Salesforce utilize ChartHop's **field settings**, so anyone in the organization can be given access to view the data in the corresponding fields.

12. ChartHop by ChartHop

Welcome to ChartHop by ChartHop — the ultimate guide built from the front lines of customer experience. This isn't theoretical documentation written in a vacuum. These are the real scenarios, solutions, and step-by-step processes our Customer Success, Implementation and Support teams use every single day when working with customers just like you.

When you're facing a complex integration, we've been there. When you need to configure a custom compensation workflow, we've built it. When you're troubleshooting data sync issues or planning a tricky org restructure, we've walked hundreds of customers through it. This collection represents hundreds of implementations, thousands of customer conversations, and countless "here's exactly how to do this" moments that our CX team has documented to help you succeed faster.

Think of this as your ChartHop cheat code — the institutional knowledge from the people who live and breathe customer use cases, distilled into clear, actionable guidance. These are the proven playbooks, the configuration recipes that actually work, and the troubleshooting wisdom we wish we could clone and send to every customer. Because at the end of the day, nobody knows how to make ChartHop work better than the team that makes it work for everyone else.

In this section of the knowledge base, we're taking the Use Case approach and cover topics like Performance Reviews, Engagement Surveys, Headcount Planning, Dashboard Building and more.

Ask ChartHop

Ask ChartHop is your AI-powered assistant built right into the platform. It knows your org, understands ChartHop, and can use what you already have to create what you actually want — whether that's a dashboard, an automated action, an answer about your headcount, or a step-by-step walkthrough of a new feature.

Think of it as your always-on guide to the platform: great for getting quick answers, building things on the fly, and learning as you go. Most customers find themselves reaching for it constantly — for data questions, for help configuring a new workflow, for figuring out how something works without having to dig through docs. Your ChartHop CX team (your CSM, Implementation Specialist, or Support) is always here for the bigger conversations, but Ask ChartHop is there for everything in between.

How to access Ask ChartHop

Ask ChartHop lives in the chat dock inside the ChartHop web app. You can also access it on mobile — including via voice mode, if you prefer to ask your questions out loud.

> **Note:** Ask ChartHop is currently in beta and must be enabled by your org's ChartHop admin. If you don't see it yet, reach out to your admin or your ChartHop CX team.

What to know before you start

A few things worth understanding upfront:

It only sees what you can see. Ask ChartHop respects your existing permissions. If a field is sensitive and hidden from your role, Ask ChartHop won't surface it in its responses either. There's no backdoor.

Your data stays yours. ChartHop does not use your organization's data to train the underlying AI model. What happens in your org stays in your org.

It shows its work. Ask ChartHop will often show you the steps it's taking to answer your question, including which tools it used and how it interpreted your request. You can use this to verify its reasoning before acting on a response.

Write actions need your approval. When Ask ChartHop proposes a change — like adding a position to a scenario or building a new chart — it will ask you to approve before anything is saved or modified. Nothing happens in the background without you.

It's smart, but not perfect. Always review AI-generated outputs before publishing or sharing them, especially for compensation data, performance results, or anything going to leadership.

How to write a good prompt

You don't need to learn a special syntax — Ask ChartHop understands plain language. That said, a little context goes a long way.

Be specific about what you want. Instead of *"show me headcount,"* try *"How many employees are in the Engineering department right now, broken down by level?"*

Mention the module or feature if you know it. If you're trying to build something in Performance Reviews vs. Headcount Planning, say so — it helps Ask ChartHop give you the right instructions.

Describe your situation. If you're setting something up for the first time or have a specific constraint (like "we have employees in multiple countries"), include that detail.

Follow up. Ask ChartHop is conversational. If the first answer isn't quite right, follow up with a clarifying question instead of starting over.

✨ What Ask ChartHop can build for you

In addition to answering questions, Ask ChartHop can actually build things on your behalf — dashboards, charts, automated actions, and more. When you see the ✨ **Ask ChartHop can build this for you** callout below, it means you can paste the prompt directly into Ask ChartHop and it will walk you through the build, step by step. You'll review and approve before anything is saved.

Use cases by module

HRIS

Set up an offboarding action

When to use this: You want automated tasks (like a checklist or manager notification) to trigger whenever someone is marked as departing.

```
"I want to set up an automated offboarding action in ChartHop. It should trigger when someone is marked as departing and send a checklist of tasks to HR. Walk me through how to build this step by step."
```

Good follow-ups to try:

- "Can the action also notify the departing person's manager?"
- "How do I add a form submission step to the action?"
- "Can I trigger different actions based on voluntary vs. involuntary departure?"

✨ **Ask ChartHop can build this for you** — paste the prompt above and Ask ChartHop will guide you through building the action. Once it's built, you'll want to test the trigger manually to confirm it fires correctly.

Set up a preboarding experience

When to use this: You want new hires to complete tasks (like signing offer letters or filling out their profile) before their start date.

```
"We want new hires to complete a set of tasks before their start date — things like signing offer letters, filling out their profile, and acknowledging our handbook. How do I set up a preboarding experience in ChartHop?"
```

Good follow-ups to try:

- "Can I assign different preboarding tasks based on department?"
- "How do I make sure the new hire gets a notification?"
- "Can I include a document signature step?"

Note: The preboarding portal is currently in Alpha. Check with your ChartHop CX team to confirm it's available for your org before building.

Configure a PTO policy

When to use this: You need to set up PTO in ChartHop so employees can submit and track time off.

"I need to set up our PTO policy in ChartHop. We have unlimited PTO for full-time employees and a separate sick leave policy. How do I configure this so employees can submit and track time off?"

Good follow-ups to try:

- "How does a manager approve a PTO request?"
- "Can I set up different policies for different countries?"
- "How do employees see their upcoming and past time off?"

Build a Resources page

When to use this: You want a central place where employees can find your company handbook, PTO policy, benefits info, and other reference materials.

"I want to create a Resources page in ChartHop where employees can find our company handbook, PTO policy, and benefits information. How do I build and publish a resource page?"

Good follow-ups to try:

- "Can I restrict certain resource pages to specific departments or roles?"
- "Can I embed links or attachments in a resource page?"
- "How does an employee navigate to resource pages?"

✨ **Ask ChartHop can build this for you** — Ask ChartHop can walk you through creating and publishing the page. Note that resource pages are read-only for

employees — they can view content but can't interact with it directly.

Create a custom profile tab

When to use this: You want to display specific information on employee profiles — like onboarding status, custom data, or performance history — and control who can see it.

"We want to create a custom profile tab in ChartHop that shows each employee's onboarding checklist status and key personal details. How do I configure a custom profile tab and control who can see it?"

Good follow-ups to try:

- "Can a profile tab show data from a form submission?"
- "How do I control which fields appear on the tab?"
- "Can managers see a different tab than employees?"

✨ **Ask ChartHop can build this for you** — Ask ChartHop can guide you through the tab configuration. Profile tab visibility is controlled by field-level sensitivity settings, so review those before going live.

Map custom fields from an integration (e.g., HiBob)

When to use this: You're syncing an HRIS like HiBob into ChartHop and need to map fields between the two systems.

"We're syncing HiBob into ChartHop and have custom fields in HiBob that need to map to custom fields in ChartHop. Walk me through how custom field mapping works in an integration sync, and what I need to configure on the ChartHop side."

Good follow-ups to try:

- "What happens if a field exists in HiBob but not yet in ChartHop?"
- "How do I review sync errors after the first run?"

- "Can I map a HiBob field to a ChartHop enum field?"

```
Note: Field mapping must be completed directly in the integration settings by a ChartHop admin. Ask ChartHop will guide you through the steps, but it can't execute the configuration for you.
```

Performance Reviews

Plan your performance cycle

When to use this: You're setting up your first (or next) performance review cycle and want to think through the structure before you build.

```
"We're planning our first performance review cycle in ChartHop. We want self-reviews, manager reviews, and a calibration step. We have about 80 employees across 4 departments. Help me think through what we need to configure before we build."
```

Good follow-ups to try:

- "How long does a typical build take?"
- "Should we use one assessment or multiple?"
- "How do we handle employees who are on leave during the review window?"

Build your review forms

When to use this: You're ready to create the actual self-review and manager review forms for your cycle.

```
"I want to build a self-review form and a manager review form for our performance cycle. The self-review should ask employees to rate themselves on impact, collaboration, and values. The manager form should include the same ratings plus a compensation recommendation field. Walk me through building these forms in ChartHop."
```

Good follow-ups to try:

- "How do I add a rating scale question?"
- "Can I make certain questions visible only to managers?"
- "How do I link the self-review and manager review so the manager can see the employee's answers while completing theirs?"

```
Ask ChartHop will walk you through building your review forms question by question. If you're using complex conditional logic (show/hide based on answers), test thoroughly before launching to employees.
```

Set up calibration groups

When to use this: You want to run a calibration session after manager reviews close, organized by department or team.

```
"We want to run a calibration session after manager reviews are complete. Calibration should happen by department, with department heads as facilitators. How do I set up calibration groups in ChartHop?"
```

Good follow-ups to try:

- "Can one person be in multiple calibration groups?"
- "How do I lock manager review scores before calibration starts?"
- "Can I export calibration results?"

```
Note: Calibration group membership needs to be configured before the assessment launches. Making changes mid-cycle can cause data inconsistencies, so set this up early.
```

Display performance results on employee profiles

When to use this: Your review cycle is complete and you want managers (or employees) to be able to see final ratings on the employee profile page.

```
"After our performance review is complete, we want managers to be able to see each employee's final rating, manager comments, and calibrated score on their
```

profile page. How do I set up a profile tab to display performance review results?"

Good follow-ups to try:

- "Can I control which roles can see the performance tab?"
- "How do I show data from the most recent cycle only?"
- "Can employees see their own rating on their profile?"

Note: Profile tabs pull from fields, not raw form responses. Performance data needs to be written to fields (via assessment merge) before it will show up on a profile tab.

Build a performance analytics dashboard

When to use this: Your cycle has closed and you want to report on completion rates and ratings distribution.

"Our performance review cycle just closed. I want to build a dashboard that shows (1) form completion rates by department, and (2) the distribution of performance ratings across the company. Help me build this in ChartHop."

Good follow-ups to try:

- "How do I filter the dashboard to just one department?"
- "Can I compare ratings distribution between this cycle and last cycle?"
- "How do I export this data for our board presentation?"

✨ **Ask ChartHop can build this for you** — Ask ChartHop can generate the charts and help you assemble the dashboard. Completion rate data requires that due dates were set on the assessment — if they weren't, completion tracking may be incomplete.

Headcount Planning

Set up an approval chain

When to use this: You want headcount requests in your planning scenario to go through a defined approval process before they're finalized.

```
"We want every new headcount request in our planning scenario to go through an approval process: first the hiring manager, then the department head, then Finance. How do I set up a multi-step approval chain in ChartHop?"
```

Good follow-ups to try:

- "Can approval rules be different by department?"
- "What happens if an approver is out of office?"
- "Can I set conditional approvals — for example, only require Finance approval if the role is above a certain salary?"

```
Note: Approval chains are configured at the scenario level. Make sure your scenario is set up before configuring approvals.
```

Learn the headcount planning workflow

When to use this: You're new to headcount planning in ChartHop and want to understand the end-to-end process.

```
"I'm new to headcount planning in ChartHop. Can you walk me through the correct end-to-end workflow? Specifically: how do I create a planning scenario, add or remove positions, submit for approval, and then merge approved changes back to the live org chart?"
```

Good follow-ups to try:

- "What's the difference between a scenario and the live org?"
- "Can multiple people edit the same scenario at once?"
- "How do I see what changes were made in a scenario before approving?"

Note: Merging a scenario back to the live org requires specific permissions. Make sure the right admin and approver roles are configured before training your team on this step.

Understand your ATS integration

When to use this: You're connecting an ATS (like Greenhouse or Lever) with ChartHop and want to understand how the sync works.

"We're integrating our ATS with ChartHop for headcount planning. Walk me through how the ATS sync works — specifically how open jobs in ChartHop push to the ATS, and how hired candidates flow back into ChartHop."

Good follow-ups to try:

- "What data fields sync between ChartHop and the ATS?"
- "How do I handle a job that exists in the ATS but not in ChartHop?"
- "What triggers a candidate to become a person record in ChartHop?"

Note: ATS integration behavior varies by provider. Refer to the integration-specific guide in addition to what Ask ChartHop tells you, especially for edge cases like duplicate candidates or partial syncs.

Engagement Surveys

Build and launch an engagement survey

When to use this: You're setting up your first (or next) employee engagement survey and want to get it configured and out the door.

"I want to create an employee engagement survey in ChartHop with about 15 questions covering topics like manager effectiveness, team culture, and career development. The survey should be anonymous. Walk me through how to build and launch this."

Good follow-ups to try:

- "How do I set up anonymity so individual responses can't be traced?"
- "Can I use a Likert scale for the questions?"
- "How do I control who receives the survey?"

> ✨ **Ask ChartHop can build this for you** — Ask ChartHop can walk you through survey creation end to end. Before launching, confirm your anonymity threshold settings are appropriate for your org size (see below).

Configure survey anonymity

When to use this: You want your survey to be anonymous, but you also need to slice results by group (department, tenure, etc.) without exposing individual responses.

> *"We want our engagement survey to be anonymous, but we also want to be able to slice results by department and tenure. How does ChartHop handle anonymity in surveys? What settings do I need to configure to protect individual responses while still seeing group-level insights?"*

Good follow-ups to try:

- "What's the minimum group size threshold for anonymous results?"
- "Can I make some questions anonymous and others not?"
- "How do I prevent a manager from identifying a specific employee's response?"

> **Note:** ChartHop's anonymity model works by suppressing group-level results when a group falls below a minimum respondent threshold. If a department is small, results for that group won't be shown at all — even if responses came in. Set your thresholds carefully before launch.

Build an engagement results dashboard

When to use this: Your survey has closed and you want to analyze response rates, average scores, and breakdowns by team or tenure.

> *"Our engagement survey just closed. I want to build a dashboard that shows overall response rates, average scores by question, and a breakdown of results by department and tenure group. Help me build this dashboard in ChartHop."*

Good follow-ups to try:

- "How do I filter the dashboard for just one department?"
- "Can I compare this survey cycle to our previous one?"
- "How do I share this dashboard with our leadership team?"

> ✨ **Ask ChartHop can build this for you** — Ask ChartHop can generate the charts and walk you through assembling the dashboard. Historical comparison requires a previous survey to have been run in ChartHop — if this is your first cycle, trend data won't be available yet.

Goals

Configure your goal types

When to use this: You're setting up your goals framework in ChartHop (OKRs, company objectives, individual goals, etc.) for the first time.

> *"I want to set up our goals framework in ChartHop using OKRs. We'll have company-level objectives, department-level key results, and individual goals. How do I configure goal types in ChartHop to support this structure?"*

Good follow-ups to try:

- "Can a goal have multiple owners?"
- "How do I cascade a company goal down to individual goals?"
- "Can goal types have different visibility settings?"

> **Note:** Goal type configuration requires admin access. Ask ChartHop will walk you through the setup, but your ChartHop admin will need to execute the

```
configuration directly.
```

Set goal visibility and ownership

When to use this: You want to control who can see which goals — for example, company goals visible to all, individual goals visible only to the employee and their manager.

```
"We want company goals to be visible to everyone, department goals to be visible to that department only, and individual goals to be private between the employee and their manager. How do I configure goal visibility and ownership in ChartHop?"
```

Good follow-ups to try:

- "Can an employee see their manager's goals?"
- "How do I assign a goal to a department rather than a person?"
- "Can I change a goal's visibility after it's been created?"

```
Note: Goal sensitivity is set at the time of creation. Bulk-updating sensitivity on existing goals is not currently supported, so set this up correctly before employees start creating goals.
```

Create and track goals as an employee

When to use this: You're an employee submitting goals for the first time and want to know how to get started, add milestones, and update your progress.

```
"I'm an employee at a company that uses ChartHop. I need to submit my quarterly goals for the first time. Can you walk me through how to create a goal, add key results or milestones, and update my progress throughout the quarter?"
```

Good follow-ups to try:

- "How do I link my goal to my team's or company's goal?"

- "How do I mark a milestone as complete?"
- "How does my manager see my goal progress?"

> **Note:** If goals aren't showing up for you as an employee, it may be a permissions issue. Reach out to your ChartHop admin to confirm your role has the right access.

Recruiting

Understand the open job workflow

When to use this: Your company uses ChartHop as the source of truth for open jobs, and you want to understand the recruiter's end-to-end workflow — from approval to posting.

> *"Our company uses ChartHop as the source of truth for open jobs, which then push into our ATS. Walk me through the correct workflow a recruiter should follow — from when a new headcount request is approved in ChartHop, to when the job is live in the ATS and candidates are being reviewed."*

Good follow-ups to try:

- "What fields on the job in ChartHop map to job fields in our ATS?"
- "How does a recruiter get notified when a new job is approved and ready to post?"
- "What happens if someone edits the job in the ATS — does it sync back to ChartHop?"

> **Note:** The sync between ChartHop and your ATS is directional — ChartHop pushes to the ATS, not the other way around. Edits made directly in the ATS may not sync back. Make sure your recruiting team knows where the source of truth lives.

Configure required fields on open jobs

When to use this: You want to make sure open jobs in ChartHop have all the information a recruiter needs (job description, hiring manager, target start date, etc.) before they push to your ATS.

"We want to make sure open jobs in ChartHop have all the fields a recruiter needs before the job pushes to our ATS — things like job description, recruiter owner, target start date, and hiring manager. How do I configure required fields on open jobs and make sure they're filled in before a job can be published?"

Good follow-ups to try:

- "Can I make certain fields required before a job moves to 'Active' recruiting status?"
- "How does a recruiter update the recruiting status on a job?"
- "Can I report on which open jobs are missing required fields?"

Note: Required field validation on open jobs has some constraints. Test this flow in a scenario before rolling it out to your full recruiting team.

Understand how a hired candidate becomes an employee record

When to use this: You want to understand what happens in ChartHop when a candidate is marked as hired in your ATS — what syncs automatically and what needs to be completed manually.

"When a candidate is marked as hired in our ATS, how does that person get created as an employee record in ChartHop? Walk me through the full data flow — what triggers the sync, what data comes over, and what needs to be manually completed on the ChartHop side after the hire."

Good follow-ups to try:

- "What fields from the ATS automatically populate the person record in ChartHop?"
- "How do I set up a welcome email or preboarding action to trigger on hire?"
- "What happens if the same person applies twice — how does ChartHop handle duplicate detection?"

Note: Hired candidate sync behavior varies depending on your ATS. Refer to the integration-specific documentation for your provider to understand

```
exactly what comes over and what doesn't.
```

A few things Ask ChartHop can't do (yet)

Ask ChartHop is powerful, but it has some current limitations worth knowing about:

- It can't update goal progress (only goal descriptions) — marking a milestone complete requires a manual update in the UI.
- It can't read uploaded files, PDFs, or images — if you paste in a document, it won't be able to process it.
- It can't modify approval chains or permission settings directly — those require admin action.
- It can't make changes to your live org autonomously — all write actions require your explicit approval first.

If you run into something Ask ChartHop can't answer or gets wrong, your ChartHop CX team is always here to help.

12.2. Headcount Planning

12.2.1. Use Case: Manager Moves

Moving a Manager to a New Team in a Scenario

When you're planning a reorg in a scenario, you might need to move a manager from one part of the org to another - sometimes without bringing their current team along. ChartHop handles this cleanly using the Fill Job workflow, and the good news is that the previous team will stay put automatically.

When to use this workflow

Use this workflow when you want to:

- Move a manager to report to a new leader (including a suggested/open role)
- Keep the manager's current direct reports on their original team
- Have the vacated seat become an open backfill role

How to do it

Step 1: Create or identify the new parent role

If the role the manager will report to doesn't exist yet in the scenario, you'll need to add it first.

1. In your scenario, find the role that the new parent role will report to
2. Click the dropdown on that role's profile and select **Add direct report**
3. Fill in the job details for the new role and save to the scenario

The new role just needs to exist in the scenario as an open position before you can place someone under it.

Step 2: Create a new job under the new role for the manager

1. Click the dropdown next to **Edit job** on the new role to add a direct report job
2. Fill in the job details to match the manager's new role
3. Save to the scenario

This is the job you'll fill with the manager in the next step.

Step 3: Fill the new job with the manager

1. Select the new job you just created
2. Click the dropdown arrow next to **Edit job** and select **Fill job**
3. In the Fill job modal, select the manager from the **Person** dropdown
4. Set the **Start date** and **Announce date**
5. Set the **Move type** to **Transfer** (though you can also select one of the other options)
6. Add a note if needed
7. Click **Save to Scenario**

```
Move type options: Hire, Transfer, Promotion, Demotion. Use Transfer when an existing employee is moving to a new role or part of the org.
```

What happens to the manager's previous team

When you fill the new job as a Transfer, the manager's previous seat becomes an open backfill role. Their direct reports stay where they are, reporting up through that backfill role. You don't need to manually reassign anyone.

If you want the previous direct reports to roll up to a different manager instead of an open backfill, you have a few options:

- **Drag and drop** them on the org chart to a new manager
- **Edit job** on each person and update the Reports To field
- **Bulk edit** via the Data Sheet: select a group of people, right-click, and choose bulk edit to update their manager all at once

Moving a job and person together (when position IDs are in use)

If your org uses position IDs and you want the job and the person to move together, keeping the same position intact, the workflow is a bit different. Instead of creating a new job and filling it, you'll reassign the existing job's reporting line directly.

Do this in two stages:

Stage 1: Clear the team

Before moving the job, reassign the manager's current direct reports so the role has no team. You have a few options:

- **Drag and drop** the direct reports on the org chart to a new manager
- **Edit job** on each person and update the Reports To field
- **Bulk edit** via the Data Sheet: select the group of direct reports, right-click, and choose bulk edit to update their manager all at once

Stage 2: Move the job

Once the directs are cleared:

1. Open the manager's job and click **Edit job**
2. Update the **Reports To** field to the new parent role
3. Save to the scenario

Because you're updating the reporting line on the existing job rather than creating a new one, the position ID, job details, and person all move together as a unit. No backfill is created.

Tips

- You can complete this entire workflow without leaving the scenario. Nothing affects your live org until the scenario is merged or approved.
- If the manager you're moving has a large team, the bulk edit path via the Data Sheet is the fastest way to reassign multiple direct reports at once.
- The Transfer move type will be reflected in the person's job history once the scenario is applied.

12.2.2. Use Case: Budget Scenario

A Budget Scenario lets you model planned headcount changes and track their cost against a fixed budget in real time. It's a way to give your Finance team or department leads a sandbox to plan hiring — while making sure everyone is working against the same number and the same definition of what "cost" means for your organization.

This article walks through the full workflow end to end, starting with cost configuration, because getting that right before you build your scenario is what makes the budget tracker meaningful.

Before you start: who can create a Budget Scenario?

Budget Scenario creation is permission-controlled in ChartHop. By default, the following built-in roles can create Budget Scenarios: **Cash Comp Viewer, Comp Viewer, Equity Comp Viewer, Org Editor,** and **People Ops Admin**.

Other roles, including managers, can create other scenario types (like Create Job or Promotion Planning) but cannot create Budget Scenarios unless their access role is updated. If you have users with custom access roles who need to create Budget Scenarios, a ChartHop admin will need to add the **Allow Create Budget Scenarios** policy to their role.

Step 1: Understand how cost works — and decide what it should mean for your org

Before building your scenario, it's worth understanding how ChartHop calculates cost and where that calculation lives, because it directly affects what your budget tracker shows.

The default cost formula

By default, ChartHop calculates cost using:

(Base Salary × Org Cost Multiplier) + Variable Pay

The org cost multiplier is configured in **Admin → Financial**. If your org hasn't set one, it defaults to 1, making the effective default simply base salary + variable pay.

This formula powers two built-in cost fields:

- **cost** — calculates cost for any job, whether filled or open
- **budgetCost** — only returns a value for currently filled roles; returns null for open roles

This distinction matters for Budget Scenarios: if you're planning new open headcount, budgetCost won't contribute to your tracker — only cost will.

Why open roles often show $0

When you add a new open role to a scenario, ChartHop needs data on the role to calculate against. If the role has no base salary entered and no compensation data assigned, there's nothing to run the formula on — so cost comes back as $0.

To get cost to populate for open roles, make sure each role has the data your formula depends on. For example:

- If your formula uses base salary, enter a base salary when creating the role.
- If your formula uses comp band fields, assign a comp band to the role so those fields have a value to return.

The right approach depends on how your organization defines cost for planned headcount.

Deciding whether to use the default formula or a custom one

The default formula works well for many organizations. Consider configuring a custom formula if:

- Your org calculates cost differently — for example, using a loaded cost that accounts for benefits, taxes, or overhead
- You want cost to reflect something other than actual base salary — for example, a band-based value used for planning purposes
- You want to calculate monthly or quarterly cost instead of annualized cost
- You want to apply fiscal year date logic to your cost figures

The formula is configured at the org level in **Admin → Financial → Cost Calculations** and applies to all scenarios, not just Budget Scenarios.

Configure a custom cost formula

1. Go to **Admin → Financial**.
2. Under **Cost Calculations**, select **Custom formula**.
3. Enter a CQL expression in the **Formula** field. Some examples:

Formula	What it calculates
compBand.baseMid	The midpoint of the assigned compensation band
baseComp.annualized * 1.2 + variableTarget	Annualized base with a 1.2x loaded cost multiplier, plus variable pay target
baseComp.annualized + variableTarget	Annualized base salary plus variable pay target

1. Optionally update the **Cost label**. This short label is displayed in scenarios and defaults to *Annual Cost*. Only change it if your formula doesn't represent annual cost — for example, if you're calculating a loaded or monthly figure — so collaborators know what the number means.
2. Optionally add a **Cost description** — a plain-language explanation of what the formula includes, visible to anyone with access to the scenario. Supports rich text and markdown.
3. Select **Save**.

If your formula uses comp band fields: Comp bands need to be uploaded and applied to roles before comp band fields will return values. For open roles, you can apply a comp band when creating the job inside your scenario. For existing roles, comp bands need to be applied — either inside or outside of a scenario — before you build your plan. See Compensation bands.

Step 2: Create a Budget Scenario

Once you've confirmed your cost formula reflects how your org thinks about headcount spend, you're ready to build your scenario.

1. From the left navigation, select **Planning**.
2. Select **Create scenario**.
3. Select **Budget scenario** — *Associate your changes with a fixed budget.*

4. Enter a **Scenario name** — something clear and specific, like *Q3 2026 Delivery Headcount Plan*.
5. Enter a **Start date** — the date the proposed changes are intended to go into effect.
6. Enter your **Budget amount**. This is the total spend you're planning against, measured using your configured cost formula.
7. Select **Create**.

```
On setting your budget amount: Make sure your budget amount and your cost formula are using the same basis. If your formula calculates annualized cost, your budget should be an annualized figure. If you've configured a monthly formula, your budget should be monthly. Mismatching these will make the tracker misleading.
```

You can update the budget amount at any time after creation by selecting **Edit scenario details** from the dropdown in the scenario header.

Step 3: Add roles to your scenario

Once the scenario is created, you'll land on the **Changes** tab. This is where you add and manage the roles you're planning for. Every change you make automatically updates the budget tracker in the scenario header.

Make sure each role has the data your formula needs

Roles without the right data will show $0 in your tracker and won't count against your budget even though you're planning for them. Before adding roles, make sure you know what your formula depends on.

A few things to keep in mind:

- **Be careful when cloning existing roles.** Cloned jobs carry over all data from the original, including base salary. If your formula uses band-based data for planning purposes, an existing salary on the role may produce unexpected cost figures. Creating roles from scratch gives you a clean starting point.
- **Apply any required comp bands when creating the role.** If your formula references comp band fields, assign the band at role creation. A comp band field can't return a value if no band is assigned.

- **Set a Planned Start Date on each role.** This affects how ChartHop treats the role. Jobs without a future planned start date are treated as open; setting a future date is what converts a role to a "new hire" in terms of how it's counted in headcount and cost calculations. This date is also used in forecast reports — when you view the scenario using *Primary, with Forecast* as the data source, roles with a Planned Start Date are projected as filled on that date.

Step 4: Track spend against your budget

The **budget tracker** lives in the scenario header, next to the scenario name and status. It shows:

- The annualized cost of all changes in the scenario so far
- Your total approved budget amount (for example, *$0 / $15,000,000*)
- A progress bar showing how much of your budget has been used

The tracker updates in real time as you add and edit roles. If a new role pushes you over budget, you'll see it immediately.

For a deeper breakdown, select the **Impact** tab inside your scenario. This surfaces reports that slice headcount cost by dimensions like team, location, department, or role type — useful for presenting the plan to Finance or department leads.

Step 5: Share your scenario

When you're ready to bring in collaborators, use the sharing controls in the scenario header to add them. Each person gets a permission level that combines what they can **do** with what data they can **see**.

Permission	What it means
Viewer - limited data access	Read-only; can only see changes to people below them in the org chart; cannot view the total cost summary
Viewer - standard data access	Read-only; can only see what they'd normally have access to on Primary
Viewer - full data access	Read-only; can see all scenario data including compensation, regardless of their normal access role
Editor - limited data access	Can make changes; limited to people below them in the org chart; cannot view the total cost summary
Editor - standard data access	Can make changes; limited to data they'd normally have access to on Primary
Editor - full data access	Can make changes; full access to all scenario data including compensation
Owner - full data access	Full access, including the ability to merge the scenario to Primary

Choosing the right level:

For a Finance team or department lead who is actively building out the plan, **Editor - full data access** is usually the right choice — they need to add roles and see compensation data to plan meaningfully. If they're reviewing rather than building, **Viewer - full data access** gives them visibility without edit rights.

Use **standard data access** when someone should only see what they'd normally see on Primary. Use **limited data access** when you want a manager to plan their own part of the org without visibility into the full cost picture or other teams' data.

Note: Full data access overrides a person's normal ChartHop access role for the scope of this scenario. Use it for people who genuinely need to see sensitive compensation data to do their planning work.

Step 6: Submit for approval and merge to Primary

Setting up an approval chain

Budget Scenarios support their own dedicated approval chain, separate from other scenario types. If your org requires approval before a headcount plan goes live, you can configure an approval chain specifically for Budget Scenarios in **Admin → Approval Chains**. This lets you route Budget Scenario approvals to Finance, leadership, or a different set of approvers than, say, a promotion planning scenario.

Submitting and the approval flow

When your scenario is ready for review, select **Submit for approval** in the scenario header.

Once submitted, the active approver can make edits to the scenario — for example, adjusting a planned start date or updating compensation. Once they approve or reject, the scenario locks and they can no longer edit it.

> **Note:** There are currently no in-platform notifications sent when an approver makes edits. Anyone with access to the scenario maintains visibility as always.

If a scenario is **rejected**, it enters a locked state. The submitter should select **Edit Scenario** from the **Actions** dropdown to unlock it, return it to Draft status, make revisions, and resubmit.

Merging to Primary

Once approved, select **Merge to Primary** to bring your planned changes into the live org chart.

Merging works well for open roles you're adding. If your scenario includes changes to existing employees' fields — like title or salary — keep in mind that any fields synced from your HRIS will be overwritten at the next sync. For those changes, the recommended approach is to export a CSV from the scenario and import those changes directly into your HRIS source system first, then merge.

Customize ChartHop with AI

You don't need to know how to code to make ChartHop feel like yours.

The platform supports HTML and Markdown in several key areas — your homepage, employee profiles, document templates, and forms. That means you can customize layouts, add your brand colors and fonts, and surface the right information for every employee.

AI makes this fast. You describe what you want, share your brand details, and paste the output directly into ChartHop. The guides in this section walk you through exactly how to do it.

Pro tip: Before you start prompting, give your AI some context. Link it to docs.charthop.com or paste in the articles most relevant to what you're building. An AI that knows how ChartHop works will get you further, faster.

How it works

ChartHop's customizable areas support dynamic field expressions — {{fieldCode}} — that pull in live employee data automatically. You write the layout once, and ChartHop personalizes it for every person in your org.

Every guide includes:

- What to collect before you start (colors, fonts, field codes)
- A copy-paste prompt you can take straight to Claude, ChatGPT, or any other AI tool
- Tips for getting better output
- Step-by-step instructions for adding it to ChartHop

Guides in this section

Profile Tab Config

Add custom tabs to employee profile pages. Use them to surface role-specific resources, display custom data fields, or organize information that doesn't have a home anywhere else in ChartHop.

Supports: HTML with inline CSS, {{fieldCode}} expressions

Letter Templates

Generate branded, personalized documents directly from ChartHop — offer letters, comp review letters, total rewards statements, PIIAs, proof of employment letters, and more. Templates have a dedicated Stylesheet tab, so you can define your brand styles once and reuse them across every document.

Supports: HTML, CSS classes via Stylesheet tab, {{fieldCode}} expressions, PDF generation

Form Text Blocks

Add instructional and contextual content to your ChartHop forms. Intro blocks, section headers, callouts, closing notes — anything that helps employees understand what a form is asking and what happens next.

Supports: HTML with inline CSS, Markdown, {{fieldCode}} expressions

Before you open any guide

Gather these basics first. You'll need them for every prompt.

What to collect	Why
Primary brand color (hex)	Used for headers, accents, and CTAs
Secondary / accent color (hex)	Used for backgrounds, borders, callouts
Font name	Applied to all text in the layout
Logo URL	Used in document headers (letter templates)
Company name and address	Used in document headers (letter templates)

Not sure where to start? Head to the **Form Text Blocks** guide first. It's the quickest win and gives you a feel for how field expressions work before you tackle more complex layouts.

12.3.1. Build your ChartHop Homepage

Give your ChartHop homepage a real upgrade

Using AI to Build Your ChartHop Homepage

The ChartHop homepage is one of the most visible things you can customize. It's the first thing your team sees when they log in, so it's worth making it feel like yours.

Good news: you don't need to know how to code to make it look great. You just need to know your brand and how to give an AI the right instructions.

What the homepage supports

The Homepage Config in ChartHop accepts HTML with inline CSS. That means you can use:

- Custom layouts (columns, banners, cards)
- Your brand colors and fonts
- Images and logos
- Dynamic fields that pull in live employee data (more on that below)
- Links to internal resources
- Gradients, box shadows, and positioned elements
- CSS grid and flexbox layouts

No JavaScript. No external stylesheets. Everything needs to be self-contained in the HTML you paste in.

Before you start

Gather these things before you open an AI tool. The more specific you are, the better your output will be.

What to collect	Example
Primary brand color	#6E37FF
Secondary brand color	#3C137C
Accent or background color	#F5F0FF
Font name	Inter, Montserrat, Arial
Logo URL	A publicly hosted image link
What you want to greet users with	First name, job title, department
Links you want featured	Handbook, benefits portal, org chart
Tone/vibe	Clean and minimal, warm and welcoming, bold and branded

Dynamic fields you can use

ChartHop uses {{fieldCode}} syntax to pull in live data for the logged-in user. Drop these directly into your HTML.

Field	What it shows
{{name}}	Employee's full name
{{first.name}}	Employee's first name
{{last.name}}	Employee's last name
{{title}}	Current job title
{{department.name}}	Department name
{{manager.name}}	Manager's name
{{location.name}}	Office or work location
{{startDate}}	Start date

You can use these anywhere in your HTML — inside headings, paragraphs, cards, or anywhere text would go.

Note: {{name}} is the field code for full name on the homepage. {{title}} is the correct field code for job title — not {{job.title}}. If a field renders blank, check Settings > Fields to confirm the exact field code for your org.

The prompt to give your AI

Copy the template below, fill in your details, and paste it into Claude, ChatGPT, or any AI tool you use.

```
You are helping me build HTML for ChartHop, an HR platform.
Rules:
- Use only inline CSS (no <style> tags, no external stylesheets)
- No JavaScript
- All HTML must be self-contained
- Dynamic fields use {{fieldCode}} syntax — keep these exactly as written

My brand details:
- Primary color: [YOUR PRIMARY HEX]
- Secondary color: [YOUR SECONDARY HEX]
- Background color: [YOUR BACKGROUND HEX or "white"]
- Font: [YOUR FONT NAME] — use it as the font-family, with Arial as fallback
- Logo URL: [YOUR LOGO URL, or "no logo"]

I want to build a ChartHop homepage that:
- Greets the logged-in employee by name using {{name}}
- Shows their job title using {{title}}
- [DESCRIBE ANYTHING ELSE: quick links, announcements, a welcome message,
etc.]

Design notes:
- [ADD YOUR PREFERENCES: minimal, full-width banner, card layout, etc.]
- Keep it clean and scannable
- Use my primary color for headings and key accents

Output only the HTML. No explanation.
```

Tips for better results

Be specific about layout. "A banner at the top with my logo and a welcome message, then two columns below with quick links" gives the AI a lot more to work with than "make it look nice."

Ask for one section at a time. If you want a homepage with a banner, a resource grid, and an announcement area, prompt for each one separately, then combine them.

Use grid for two-column layouts. The homepage renderer supports display:grid — use grid-template-columns: 1fr 1fr for two-column sections. This gives you more control than flex alone.

Test your field codes. Paste the HTML into ChartHop and preview it as a real employee to confirm the dynamic fields are rendering correctly. If a field shows up blank, go to Settings > Fields and search for the right field code.

Iterate fast. If the first output isn't right, paste it back into the AI and describe what you want changed. You don't have to start from scratch.

Pasting it into ChartHop

1. Go to Settings > Homepage Config
2. Paste your HTML into the editor
3. Preview the page to check how it looks for different employees
4. Save when you're happy with it

That's it. Your whole team will see the updated homepage the next time they log in.

12.3.2. Create a Letter Template

Using AI to Build Letter Templates in ChartHop

Letter templates in ChartHop let you generate polished, branded documents for employees — offer letters, compensation statements, promotion letters, and more. You can build them once and generate them on demand for any employee.

You don't need to write the code yourself. You just need to know what you want the document to say and give an AI the right instructions.

What letter templates support

ChartHop's Letter Templates feature uses two tabs: a **Content tab** and a **Stylesheet tab**.

Tab	What goes here
Content	Your HTML, including {{fieldCode}} expressions and class="" attributes
Stylesheet	Your CSS class definitions — this is where all styling lives

This separation matters. Unlike profile tabs and the homepage, letter templates do not support inline styles for layout-critical properties. All CSS must be defined in the Stylesheet tab and applied via class names in the Content tab.

Common document types

Document type	What it typically includes
Offer letter	Name, title, start date, base salary, manager
Compensation statement	Current salary, bonus target, equity, effective date
Promotion letter	New title, new salary, effective date, manager
Termination letter	Name, last day, severance details
Leave confirmation	Name, leave type, start and return dates

Dynamic fields you can use

ChartHop uses {{fieldCode}} syntax to pull in live data for the employee the letter is being generated for.

Field	What it shows
{{first.name}}	First name
{{last.name}}	Last name
{{title}}	Job title
{{department.name}}	Department
{{manager.name}}	Manager's name
{{location.name}}	Work location
{{startDate}}	Start date
{{base}}	Base salary
{{org.name}}	Your organization's name
{{org.image}}	Your organization's logo

If you've created custom fields in ChartHop, you can use those field codes here too. Find them in Settings > Fields.

The prompt to give your AI

Copy the template below, fill in your details, and paste it into Claude, ChatGPT, or any AI tool you use.

```
You are helping me build a letter template for ChartHop's Letter Templates
feature.
Rules:
- Use only CSS classes defined in a separate Stylesheet tab — no inline
styles for layout-critical properties
- No JavaScript
- All HTML must be self-contained
- Wrap all content in <body> tags
- Use <table> for all multi-column layouts — flexbox and CSS Grid are not
supported
- No emoji or non-standard Unicode characters
- Dynamic fields use {{fieldCode}} syntax — keep these exactly as written

My brand details:
```

```
- Primary color: [YOUR PRIMARY HEX]
- Secondary color: [YOUR SECONDARY HEX]
- Font: [YOUR FONT NAME], with Arial as fallback
- Logo URL: [YOUR LOGO URL, or "no logo"]

I want to build a letter template for: [DESCRIBE THE DOCUMENT TYPE]

It should include:
- [FIELD 1 — e.g., "Employee name using {{first.name}} {{last.name}}"]
- [FIELD 2 — e.g., "Their job title using {{title}}"]
- [FIELD 3 — e.g., "Their base salary using {{base}}"]

Design notes:
- [YOUR PREFERENCES: formal, clean, branded header, etc.]
- Use my primary color for headings and key accents

Output two things separately:
1. The stylesheet (CSS classes only — no inline styles)
2. The HTML content (uses those class names via class="" attributes, wrapped
in <body> tags)
```

HTML rendering rules

ChartHop's PDF renderer supports a limited subset of HTML. Keep these constraints in mind when building your letter template.

- **Always wrap content in <body> tags.** Without <body>, the renderer treats your content as plain text and outputs raw HTML tags literally in the PDF.
- **Avoid inline style attributes for layout-critical properties.** Inline styles are sometimes ignored by the renderer. Define CSS classes in the Stylesheet tab instead and apply them via class="".
- **Use <table> for all multi-column layouts.** Flexbox and CSS Grid are not supported. Any side-by-side layout must be built with nested <table> elements using width percentages.
- **The stylesheet applies globally.** ChartHop's default stylesheet adds border: 1px solid gray to all table, tr, and td elements. If you don't want borders on your tables, explicitly override this in your stylesheet: table, tr, td, th { border: none; }
- **Avoid emoji and non-standard Unicode characters.** The PDF renderer's font set does not include emoji glyphs — they render as # or a blank box. Use text or standard ASCII characters instead.

- **Keep table nesting to 2 levels where possible.** Nested <table> closing tags can leak as visible text in some rendering contexts. Always verify with a downloaded PDF, not just the preview panel.

Adding page breaks

To force content onto a new page, add this class to your Stylesheet tab:

css

```
.pagebreak {  page-break-after: always;}
```

Then place in your content exactly where you want the break.

Do not use inline styles for page breaks — is ignored by the renderer. The class-based approach is the only method that works reliably.

Tips for better results

Prompt for the stylesheet first, then the content. Ask your AI to generate the stylesheet in one pass, then the HTML content in a second pass that references those class names. This keeps the output clean and easier to troubleshoot.

Name your custom fields clearly. If you're using a custom field code, tell the AI what it represents. For example: "{{cf_bonus_target}} is a custom field called Bonus Target — it contains a percentage."

Always verify with a downloaded PDF. The preview panel in ChartHop doesn't always match the final rendered PDF. Download the document before signing off on the template.

Keep table nesting shallow. If you need columns inside columns, restructure the layout rather than going three levels deep. Deeply nested tables are the most common source of rendering artifacts.

Iterate fast. If the first output isn't right, paste it back into the AI and describe what to change. You don't have to start over.

Pro tip: Before you start prompting, give your AI some context. Link it to docs.charthop.com or paste in the articles most relevant to what you're building. An AI that knows how ChartHop works will get you further, faster.

Adding it to ChartHop

1. Go to **Settings > Letter Templates**
2. Create a new template or open an existing one
3. Paste your CSS into the **Stylesheet tab**
4. Paste your HTML into the **Content tab**
5. Generate a test letter for a real employee
6. Download the PDF to verify rendering
7. Save when you're happy with it

Once saved, the template is available to generate documents from any employee's profile or through a workflow.

12.3.3. Customize your Forms

Using AI to Write Form Text Blocks

Form Text Blocks are the instructional and contextual content you add inside a ChartHop form. They're not fields — they're the copy that helps employees understand what a form is asking them to do.

Used well, they reduce confusion, set expectations, and make forms feel less like bureaucracy and more like a conversation. AI can write all of it. You just need to know what each section needs to say.

What Form Text Blocks support

Form Text Blocks accept **HTML** or **Markdown**. Both work. Which one you use depends on how much formatting you need.

Use **Markdown** when you want clean, simple text: a short intro, a bulleted list of instructions, a section divider. It's faster to write and easier to update.

Use **HTML** when you need branded styling: a callout box with a background color, a header that matches your visual identity, or a more structured layout.

Both support {{fieldCode}} syntax to pull in live employee data.

No JavaScript. No external stylesheets. HTML must use inline CSS only.

Common uses

- An intro block at the top of a form explaining its purpose and what happens after submission
- Section headers that divide a long form into logical parts
- Instructional callouts ("All responses are confidential" or "This section is for managers only")
- Contextual notes that appear mid-form ("Your answer here will be shared with your manager during calibration")
- A closing block with next steps or a timeline

Before you start

Collect these inputs before you open an AI tool.

What to collect	Example
Form name	"Q1 Performance Review," "New Hire Onboarding Checklist"
Where the block appears	Top of form, mid-form section header, closing block
What it needs to communicate	Purpose, instructions, deadlines, confidentiality note
Tone	Warm and encouraging, clear and direct, neutral and informational
Any dynamic fields to include	{{first.name}}, {{manager.name}}
Output format preference	Markdown (simple) or HTML (branded)

Dynamic fields you can use

Field	What it shows
{{first.name}}	Employee's first name
{{last.name}}	Last name
{{job.title}}	Job title
{{manager.name}}	Manager's name
{{department.name}}	Department

The prompt to give your AI

For Markdown output (simple, fast)

```
You are helping me write a text block for a ChartHop form.

Output format: Markdown only. No HTML.
```

```
This block will appear [at the top of / as a section header in / at the
bottom of] a form called "[YOUR FORM NAME]."

It should:
- [DESCRIBE WHAT YOU NEED: intro paragraph, bulleted instructions,
confidentiality note, next steps, etc.]
- Be short — this is a form, not a document. 3–5 sentences max unless I ask
for more.
- Use {{first.name}} if it makes sense to address the employee directly

Tone: [warm and encouraging / clear and direct / neutral]

Output only the Markdown. No explanation.
```

For HTML output (branded styling)

```
You are helping me write a styled text block for a ChartHop form.

Rules:
- Use only inline CSS — no <style> tags, no external stylesheets
- No JavaScript
- Dynamic fields use {{fieldCode}} syntax — keep these exactly as written

My brand details:
- Primary color: [YOUR PRIMARY HEX]
- Accent / background color for callout boxes: [YOUR ACCENT HEX or a light
tint]
- Font: [YOUR FONT NAME], with Arial as fallback

This block will appear [at the top of / as a section header in / at the
bottom of] a form called "[YOUR FORM NAME]."

It should:
- [DESCRIBE WHAT YOU NEED: a styled intro box, a callout with an icon or
colored border, a section divider with a label, etc.]
- Be short — forms need to feel approachable, not overwhelming
- Use {{first.name}} if it makes sense

Output only the HTML. No explanation.
```

Tips for better results

Shorter is almost always better. A text block that takes 30 seconds to read is a text block employees will skip. Ask the AI to keep it tight and cut anything that isn't load-bearing.

Tell the AI the context. "This appears at the top of a performance review form that employees complete about themselves" gives it everything it needs to get the tone and content right.

Use Markdown for most things. Unless you specifically need brand colors or a callout box, Markdown is faster and easier to maintain. It also tends to look cleaner inside ChartHop's form UI.

Ask for a Markdown and HTML version. If you're not sure which you want, ask the AI to give you both. Pick the one that looks better when you preview the form.

Conditional logic

If a form serves multiple employee types or roles, you can show or hide text blocks based on employee data. ChartHop uses {% if %} / {% endIf %} blocks for this.

```
{% if {{employment.type}} == 'Full-time' %}
  This section applies to full-time employees only.
{% endIf %}
```

```
{% if {{department.name}} == 'Sales' %}
  Your commission structure is outlined in your comp agreement on file.
{% endIf %}
```

Give the AI the condition and the content you want shown:

```
Add a conditional block that only shows if {{department.name}} equals
'Sales'.
When it does, show: [YOUR CONTENT]
Use ChartHop's conditional syntax: {% if [condition] %} ... {% endIf %}
```

Adding it to ChartHop

1. Open the form you're editing
2. Add a **Text Block** element where you want the content to appear
3. Paste your HTML or Markdown into the editor
4. Preview the form to check layout and confirm field codes render correctly
5. Save the form

12.3.4. Build Custom Profile Tabs

Using AI to Build Custom Profile Tabs

Profile tabs let you add structured, branded content directly to an employee's profile page. You can use them to surface role-specific resources, display custom data, or organize information that doesn't have a home anywhere else in ChartHop.

You don't need to write the code yourself. You just need to know what you want to show and give an AI the right instructions.

What Profile Tabs support

Profile tabs accept HTML with inline CSS. That means:

- Custom layouts (columns, cards, tables)
- Your brand colors and fonts
- Images and links
- Dynamic fields that pull in live employee data

No JavaScript. No external stylesheets. Everything needs to be self-contained in the HTML you paste in.

Common uses

- A "My Role" tab with responsibilities, level, or team context
- A resource tab with links scoped to a department or location
- A quick-reference tab for policies, contacts, or tools
- A custom display for fields you've added to your ChartHop instance

Before you start

Collect these inputs before you open an AI tool.

What to collect	Example
Primary brand color	#6E37FF
Secondary / accent color	#3C137C
Background color	#FFFFFF or a light tint
Font name	Inter, Lato, Arial
Tab name	"My Resources," "Role Info," "Team Hub"
What data to show	Title, manager, department, custom fields
Links to include	Benefits portal, team wiki, org chart

Dynamic fields you can use

ChartHop uses {{fieldCode}} syntax to pull in live data for the employee whose profile is being viewed.

Field	What it shows
{{first.name}}	First name
{{last.name}}	Last name
{{title}}	Job title
{{department.name}}	Department
{{manager.name}}	Manager's name
{{location.name}}	Work location
{{startDate}}	Start date
{{employment.type}}	Employment type

If you've created custom fields in ChartHop, you can use those field codes here too. Find them in Settings > Fields.

The prompt to give your AI

Copy the template below, fill in your details, and paste it into Claude, ChatGPT, or any AI tool you use.

```
You are helping me build HTML for a custom profile tab in ChartHop, an HR
platform.
Rules:
- Use only inline CSS — no <style> tags, no external stylesheets
- No JavaScript
- All HTML must be self-contained
- Dynamic fields use {{fieldCode}} syntax — keep these exactly as written

My brand details:
- Primary color: [YOUR PRIMARY HEX]
- Accent color: [YOUR ACCENT HEX]
- Background: [YOUR BACKGROUND HEX or "white"]
- Font: [YOUR FONT NAME], with Arial as fallback

I want to build a profile tab called "[TAB NAME]" that shows:
- [FIELD 1 — e.g., "The employee's job title using {{title}}"]
- [FIELD 2 — e.g., "Their manager using {{manager.name}}"]
- [FIELD 3 — e.g., "Quick links: list them here"]

Design notes:
- [YOUR PREFERENCES: card layout, two columns, minimal, etc.]
- Use my primary color for section headers
- Keep it scannable — this is reference content, not a marketing page

Output only the HTML. No explanation.
```

Tips for better results

Think about who's viewing the tab. Profile tabs can be seen by the employee, their manager, or teammates depending on your permissions setup. Write your prompt with the right audience in mind.

Name your custom fields clearly. If you're using a custom field code, tell the AI what it represents. For example: "{{cf_role_focus}} is a custom field called Role Focus — it contains a short description of the employee's main area of work."

Keep each tab focused. A tab with 12 sections is harder to navigate than two focused tabs. One purpose per tab.

Check field visibility. Make sure the fields you're pulling in are visible to the people viewing the tab, based on your ChartHop permissions settings.

Iterate fast. If the first output isn't right, paste it back into the AI and describe what to change. You don't have to start over.

Paste carefully. ChartHop's content area renders a mix of markdown and inline HTML. A few rules that matter:

- Use #### markdown headings for section titles instead of <h4> tags
- Use display: flex; flex-wrap: wrap for multi-column layouts — CSS grid isn't supported
- Don't leave blank lines inside HTML blocks — blank lines cause the renderer to break out of HTML mode and display raw code instead

Conditional logic

You can show or hide sections of a profile tab based on employee data. This is useful when a tab serves multiple roles or locations and certain content only applies to some employees.

ChartHop uses {% if %} / {% endIf %} blocks for this.

```
{% if {{employment.type}} == 'Full-time' %}  <p>You're eligible for the full benefits package. Find details in the links below.</p>
{% endIf %}

{% if {{location.name}} == 'Remote' %}
  <p>Your home office stipend information is managed through [LINK].</p>
{% endIf %}
```

Tell your AI exactly what condition you need and what content should appear when it's true:

```
Add a section that only appears if {{location.name}} equals 'Remote'.When it does, show: [YOUR CONTENT]
Use ChartHop's conditional syntax: {% if [condition] %} ... {% endIf %}
```

Adding it to ChartHop

1. Go to Settings > Profile Tab Config
2. Create a new tab or open an existing one
3. Paste your HTML into the content area
4. Preview on a real employee profile
5. Set visibility permissions
6. Save

The tab will appear on every employee profile where your settings apply.

12.4. Carrot (CQL)

Understanding CQL (Carrot): ChartHop's Formula Language

ChartHop has a built-in expression language called CQL, short for Carrot Query Language (we call it Carrot). It's the engine behind some of ChartHop's most powerful capabilities: searching, filtering, calculating, and displaying people data exactly the way your organization needs it. Once you get the hang of it, you'll start noticing it everywhere in the platform.

Where Carrot Lives

The great thing about Carrot is that the logic works the same no matter where you're writing it. Dashboards, forms, the org chart, data sheets, markdown profile tabs — same expressions, just a slightly different wrapper depending on context. Learn it once and it clicks everywhere.

Where You're Working	How You Write It
Dashboard charts (Advanced mode)	{{base / fieldCode1}}
Form content blocks	{{formatMoney(base)}}
Smart Calcs and Smart Buckets	Plain expression: base * fieldCode1
Data Sheet calculated columns	Plain expression: diffYears(startDate, today())
Markdown profile tabs / home page	{{ }} for values · {% %} for logic

What Carrot Can Do

Calculate anything. Compa-ratio, tenure, weighted performance scores, prorated salary — if the data lives in ChartHop, Carrot can work with it. A couple of quick examples:

```
base / fieldCode1                (compa-ratio)diffYears(startDate, today())
(tenure in years)
```

Filter with real precision. Carrot is what powers search and filtering across the platform. Want every active manager in Engineering with more than three years of tenure? One expression handles it.

```
is:manager && department.func='Engineering' && diffYears(startDate, today())
>= 3
```

Label and categorize automatically. Smart Buckets use Carrot conditions to color-code employees across the org chart and data sheet. No manual work, no spreadsheets on the side.

Surface context right inside forms. One of our favorite use cases: embedding live Carrot expressions into review and comp forms so reviewers see everything they need without leaving the page.

```
Current Base: {{formatMoney(base)}}
Tenure: {{formatRound(diffYears(startDate, today()), 1)}} years
```

Show or hide content based on data. In markdown tabs and the home page, Carrot's logic blocks let you control what people see based on their actual profile data.

```
{% if diffYears(startDate, today()) >= 1 %}Eligible for annual review.
{% else %}
Not yet eligible — less than 1 year of tenure.
{% endIf %}
```

A Few Things Worth Knowing

Carrot references fields by their field code, not their display name, so if a field gets renamed in ChartHop, you'll want to update any references manually. If a field might be empty, get in the habit of adding ?: 0 to your formula so it doesn't break on blank values. And when you're pulling historical data for reporting or baselines, use asOfPrimary rather than asOf — it keeps draft scenario data out of the picture.

If you want to go deeper, the CQL Cheat Sheet has the full formula reference. And as always, your ChartHop admin or CSM is happy to help you get started.

12.4.1. What's new in CQL?

Coming soon...

12.4.2. CQL in Approval Chains

CQL in Approval Chains: Reference Guide

Approval chains in ChartHop control who needs to sign off on a scenario before it's merged. Carrot expressions are used in two places: the **"Only include stage if"** condition on a stage (to control whether the stage fires at all) and the **approver definition** itself (to route to the right person dynamically). This guide covers both.

How Approval Chain CQL Is Evaluated

Before building conditional logic, it helps to understand how ChartHop evaluates these expressions:

- Conditional stage expressions are evaluated against each **change** in the scenario, not the scenario as a whole — unless you use scenarioChanges, which operates at the scenario level.
- The best way to test a change.before / change.after expression is to use it as a **filter on the scenario Changes tab**. If it returns results there, it will fire in the approval chain.
- If a stage's approver resolves to nobody and no fallback approver is set, the chain will stall. Always configure a fallback approver for any stage that uses dynamic routing.

Stage Approver Options

When setting up a stage, the **Stage Approvers** field supports several modes:

Option	What it does
Manager	Routes to the direct manager of the job being changed
Grand Manager	Routes to the manager's manager
Specific Person	Routes to a named individual — always fires for that person
Person Field	Routes to whoever is in a custom Person-type field (e.g., Hiring Manager, Talent Partner)
Multiple stages, one per manager in the chain	Creates a dynamic stage for every manager in the hierarchy, all the way up — each approves in sequence
Custom CQL expression	Define your own routing logic

```
If you use a Person field as the approver and the field is blank on a given job, the fallback approver will be used instead.
```

Conditional Stage Expressions

These go in the **"Only include stage if"** field. The stage only fires when the expression evaluates to true.

Trigger only if a specific field changed

```
change.before.base != change.after.base
```

```
Works for any field. Combine multiple fields with ||: (change.before.base != change.after.base) || (change.before.fieldCode1 != change.after.fieldCode1)
```

Trigger only if manager changed

```
change.before.manager != change.after.manager
```

Trigger only if a specific person submits the scenario

```
name:'First Last'
```

```
Set the condition type to Custom and use name: with the person's full name.
This is the confirmed working pattern for submitter-based routing.
```

scenarioChanges Expressions

scenarioChanges operates at the **scenario level** rather than per-change. Use it when the approval decision should be based on the combined contents of the scenario rather than any individual change. These are called **Approval Group Inclusion Expressions** in the platform.

Trigger based on total cost impact across all changes

```
scenarioChanges.sum{change.cost} > 500000
```

Use when you want approval based on the total cost of all changes combined.

Example: Require VP approval when the combined salary impact of all changes exceeds $500,000. Replace the number with your org's threshold.

Trigger if any change in the scenario affects a specific condition

```
scenarioChanges.any{department='Engineering'}
```

Use when you want approval if at least one change matches a condition.

Example: Include the Engineering Director as an approver whenever any change in the batch affects an Engineering employee — even if the rest of the scenario touches other departments.

Trigger only if every change in the scenario matches a condition

```
scenarioChanges.all{department='Engineering'}
```

Use when you want approval only if every change matches a condition.

Example: Route to a specialized Engineering approval chain only when the entire batch contains Engineering changes. Skip it if the scenario is mixed across departments.

Combine scenario content with submitter identity

```
scenarioChanges.all{department='Engineering'} && title='CEO'
```

Use when you want to combine a condition about the changes with a condition about who is submitting the request.

Example: Only include this approval stage when all changes are in Engineering AND the person submitting the request is the CEO. This lets you create different approval flows based on both what's changing and who's requesting it.

Common Approval Chain Patterns

Route to a Talent Partner or custom role via a Person field

1. Create a custom Person-type field (e.g., talentPartner) on the job
2. In the approval stage, set Stage Approvers to that Person field
3. ChartHop will route to whoever is in that field for each job — different jobs can route to different people automatically
4. Set a fallback approver for jobs where the field is blank

```
This is one of the most common ways teams handle talent partner or HRBP approval routing without hardcoding names.
```

Send approvals up the entire manager chain

In the Stage Approvers dropdown, select **"Multiple stages, one per manager in the manager chain"**. ChartHop will dynamically create one approval stage per manager level, from the direct manager up to the top of the org. Each approves in sequence.

```
This feature was built specifically for customers who need every manager in the hierarchy to sign off before a scenario is merged.
```

Route differently based on department

Create separate conditional stages, each with its own "Only include stage if" condition:

```
Stage 1 (Engineering Director): change.after.department='Engineering'Stage 2 (Finance Lead): change.after.department='Finance'
```

```
Stage 3 (Final approver): always fires
```

```
Each stage only fires for changes in the relevant department. The final stage can be set without a condition so it always fires as the last step regardless of department.
```

Require approval only above a cost threshold

```
scenarioChanges.sum{change.cost} > 100000
```

```
Add this as a conditional stage for senior leadership. Changes below the threshold skip the stage entirely and route only through the standard chain.
```

Key Things to Know

Test before you configure. Use the expression as a filter on the scenario Changes tab first. If it returns the changes you expect, it will behave the same way in the approval chain.

Fallback approver matters. Any stage that uses dynamic routing — Person fields, custom CQL, manager chain — should have a fallback approver configured. If the expression resolves to nobody, the chain falls to the fallback. If there's no fallback, the chain stalls.

One scenario, one approval chain. A single scenario routes through one approval chain. You can build a lot of conditional logic within that chain, but you can't branch a scenario into two separate chains simultaneously.

Approvers can edit during their stage. Once it's their turn in the chain, approvers can edit the scenario before approving or rejecting. Once they act, the scenario is locked for that stage.

The Changes tab is your best debugging tool. If a conditional stage isn't firing as expected, check whether your expression returns results there. If it doesn't, the expression syntax or field reference needs adjustment.

12.4.3. Cheat Sheet

ChartHop CQL (Carrot) Formula Cheat Sheet

```
CQL (Carrot Query Language) is ChartHop's built-in expression language for searching, filtering, calculating, and displaying people data. The same logic works everywhere — only the syntax wrapper changes.
```

Where Are You Writing This?

Context	Syntax	Example
Smart Calc / Smart Bucket	Plain expression	base * fieldCode1
Data Sheet calculated column	Plain expression	diffYears(startDate, today())
Form content block	{{ }}	{{formatMoney(base)}}
Form (live answer from same form)	formAnswers['fieldCode']	formAnswers['fieldCode1'] * 100
Document / letter template	{{ }}	{{name}}
Markdown (profile tabs, home page)	{{ }} values · {% %} logic	See Markdown section
Dashboard chart (Advanced mode)	{{ }}	{{base / fieldCode1}}

⚡ Operators

Symbol	Meaning	Example
=	Exact match	department.func='Engineering'
!=	Not equal	status!='Inactive'
:	Contains / fuzzy match	title:'Director'
> < >= <=	Comparison	base>100000
&& or and	AND (interchangeable in most cases)	department.func='Sales' && base>80000
||	OR	department.func='Sales' || department.func='Marketing'
!	NOT	!department:'Sales'
fieldCode:*	Has any value	fieldCode1:*
?	Ternary — if/then/else	base > 100000 ? 'High' : 'Low'
?:	Elvis — value if exists, else fallback	fieldCode1 ?: 0
dateOf.fieldCode	Date the field was last written	dateOf.base

&& vs and: These work interchangeably in most filter and Smart Field contexts. If a formula behaves unexpectedly, try switching to &&.

Performance & Goals

Weight an individual goal's rating by its assigned weight

```
fieldCode1 * (fieldCode2 ?: 0)
```

fieldCode1 = goal rating · fieldCode2 = goal weightage · ?: 0 prevents a blank weight from breaking the formula. Create one Smart Calc per goal, then sum them for the total.

Total weighted goal score

```
round(fieldCode1 + fieldCode2 + fieldCode3, 2)
```

Each fieldCode = a per-goal weighted rating Smart Calc field. Add a term for each goal your org uses. Keeping this as its own field makes it easy to reference in forms and the final rating calc.

Total performance rating (goals + values)

```
round((fieldCode1 * 0.80) + (fieldCode2 * 0.20), 2)
```

fieldCode1 = total weighted goal score · fieldCode2 = values/brand score. Adjust the 0.80/0.20 split to match your org's weighting — multipliers must sum to 1.0.

Average only the goals that were actually used (skip zeros and blanks)

```
mean(  fieldCode1 > 0 ? fieldCode1 : null,
  fieldCode2 > 0 ? fieldCode2 : null,
  fieldCode3 > 0 ? fieldCode3 : null
)
```

Extend with fieldCodeN > 0 ? fieldCodeN : null for each additional goal. mean() skips nulls but not zeros — this pattern ensures unused goals don't drag the average down.

Combine multiple rating categories into one weighted score

```
((fieldCode1 ?: 0) * 0.50) +((fieldCode2 ?: 0) * 0.30) +
((fieldCode3 ?: 0) * 0.20)
```

Weights must sum to 1.0. ?: 0 ensures a missing rating doesn't nullify the entire formula.

Count how many times an employee hit a specific rating in recent cycles

```
findHistoryValues({fieldCode1}).reversed.limit(6).count{it='Meets Expectations'}
```

Full history (no limit):

```
findHistoryValues({fieldCode1}).count{it='Exceeds Expectations'}
```

```
.reversed = most recent first · .limit(N) = last N cycles · Always use it inside .count{} — not the original field code. Gives reviewers a consistency signal, not just the most recent result.
```

Show a rating only if it was submitted before a review cutoff date

```
{{dateOf.fieldCode1<='2024-11-10' ? fieldCode1 : null}}
```

```
Use in a form content block. Repeat for each rating field. Prevents backdated or late entries from surfacing during calibration.
```

Compensation

Compa-ratio — where someone sits relative to their band midpoint

```
base / fieldCode1
```

```
fieldCode1 = band midpoint. Result of 1.0 = at midpoint. Format as percent for display. Foundation for pay equity analysis, merit planning, and outlier flagging.
```

Salary range penetration — how far through the band (0 = min, 1 = max)

```
(base - fieldCode1) / (fieldCode2 - fieldCode1)
```

```
fieldCode1 = band min · fieldCode2 = band max. Useful alongside compa-ratio when bands are wide.
```

Total cash compensation (base + target bonus)

```
base + ((fieldCode1 ?: 0) * base)
```

```
fieldCode1 = target bonus percentage field.
```

New base after a merit increase

```
base + (base * fieldCode1)
```

```
fieldCode1 = merit percentage field. Best used as a Data Sheet calculated column during comp planning — no permanent field needed.
```

Prorated salary for a mid-year hire

```
base * (diffDays(startDate, '2026-01-01') / 365)
```

```
Replace '2026-01-01' with your fiscal year-end date.
```

Prorated annual cost with start and end date logic (full fiscal year)

```
startDateJob > date('2026-01-01') ?  (endDateJob ?
    monthlyCost * 12 * (endDateJob - startDateJob + 1) / 365 :
    monthlyCost * 12 * (date('2026-12-31') - startDateJob + 1) / 365
  ) :
  (endDateJob && endDateJob < date('2026-12-31') ?
    monthlyCost * 12 * (endDateJob - date('2026-01-01') + 1) / 365 :
    monthlyCost * 12
  )
```

```
Use this for scenario planning and headcount cost forecasting. Handles mid-year starts, mid-year terms, and full-year employees in one expression. To show proration as a % of annual cost: proratedFyCost / (monthlyCost * 12) * 100. Update the year dates each cycle.
```

Prior salary — what someone earned before their last increase

```
asOfPrimary(dateOf.base - 1, {base})
```

dateOf.base = date of last base change. Subtracting 1 day retrieves the value just before it. No custom fields needed.

Year-over-year base salary change

As a percentage:

```
(base - asOfPrimary('2025-01-01', {base})) / asOfPrimary('2025-01-01', {base})
```

As a dollar amount:

```
base - asOfPrimary('2025-01-01', {base})
```

Replace '2025-01-01' with your baseline date. Use asOfPrimary — not asOf — to exclude draft scenario data.

Total comp including equity vesting

```
cashComp + vestValue(today(), nextAnniversary(startDate))
```

Built-in fields only. Adds total cash to the value of equity vesting in the next 12 months.

Tenure, Dates & Eligibility

Question	Formula
How long has someone been here?	diffYears(startDate, today())
How long in their current role?	diffDays(titleDate, today())
When is their next work anniversary?	nextAnniversary(startDate)
How old is this employee?	diffYears(birthdate, today())
Did their manager change recently?	diffDays(dateOf.manager, today()) <= 90
When were they last eligible for a raise?	dateOf.base
When will they next be eligible?	dateOf.base + 365
How long has this req been open?	diffDays(openDate, today())
When did this person become a manager?	dateOf.directReports
Did they become a manager in the last 30 days?	diffDays(dateOf.directReports, today()) <= 30

Smart Bucket Templates

```
Smart Buckets assign a color-coded label based on CQL conditions. Use them on the org chart, Data Sheet, and dashboards for instant visual grouping.
```

Performance tiers · fieldCode1 = weighted score field

Label	Expression
High Performer	fieldCode1 >= 4.5
Strong Performer	fieldCode1 >= 3.5 && fieldCode1 < 4.5
Meets Expectations	fieldCode1 >= 2.5 && fieldCode1 < 3.5
Needs Improvement	fieldCode1 < 2.5

Compa-ratio bands · fieldCode1 = compa-ratio Smart Calc field

Label	Expression
Below Band	fieldCode1 < 0.80
In Range	fieldCode1 >= 0.80 && fieldCode1 <= 1.20
Above Band	fieldCode1 > 1.20

Tenure bands · Uses built-in startDate

Label	Expression
New Hire (<1 yr)	diffYears(startDate, today()) < 1
Early Career (1–3 yrs)	diffYears(startDate, today()) >= 1 && diffYears(startDate, today()) < 3
Established (3–5 yrs)	diffYears(startDate, today()) >= 3 && diffYears(startDate, today()) < 5
Veteran (5+ yrs)	diffYears(startDate, today()) >= 5

Merit eligibility · fieldCode1 = performance rating field

Label	Expression
Eligible	diffMonths(startDate, today()) >= 6 && fieldCode1 >= 3
Ineligible – Too New	diffMonths(startDate, today()) < 6
Ineligible – Rating	fieldCode1 < 3

Flight risk · fieldCode1 = band minimum field

Label	Expression
High Risk	diffMonths(titleDate, today()) >= 24 && base < fieldCode1
Medium Risk	diffMonths(titleDate, today()) >= 18 || base < fieldCode1
Low Risk	diffMonths(titleDate, today()) < 18 && base >= fieldCode1

Span of control · Uses built-in directReports · Apply to Jobs

Label	Expression
Under-leveraged (1–3)	length(directReports) >= 1 && length(directReports) <= 3
Healthy (4–8)	length(directReports) >= 4 && length(directReports) <= 8
Over-leveraged (9+)	length(directReports) >= 9

Open req age · Uses built-in openDate

Label	Expression
Fresh (<30 days)	diffDays(openDate, today()) < 30
Active (30–60 days)	diffDays(openDate, today()) >= 30 && diffDays(openDate, today()) < 60
Aging (60–90 days)	diffDays(openDate, today()) >= 60 && diffDays(openDate, today()) < 90
Stale (90+ days)	diffDays(openDate, today()) >= 90

Forms: Embedding Live CQL Data

How to add a CQL content block to a form

1. Go to **People Ops Tools → Forms** → open or create a form
2. Click **+ Add Question / Block** → select **Content** block type
3. Type your text and embed CQL using {{expression}} syntax
4. Save and preview — expressions render live against the employee the form is about

```
Content blocks are read-only. They display data but cannot be edited by the reviewer. Use formAnswers['fieldCode'] (instead of just fieldCode) when reading a value entered earlier in the same form session.
```

Employee context card — put this at the top of any review or comp form

```
Name: {{name}}  |  Title: {{title}}  |  Dept: {{department.name}}Tenure: {{formatRound(diffYears(startDate, today()), 1)}} years
Current Base: {{formatMoney(base)}}
Band: {{formatMoney(fieldCode1)}} – {{formatMoney(fieldCode2)}}
```

```
Compa-Ratio: {{formatRound(base / fieldCode3, 2)}}
Last Rating: {{asOfPrimary('2024-07-01', {fieldCode4})}}
```

```
Replace fieldCode1–4 with your band min, band max, midpoint, and rating fields.
```

Compensation flag — auto-surface outliers to the reviewer

```
{{(base / fieldCode1) < 0.80 ? '⚠ Below band minimum — flag for discussion.'
: '✅ Within compensation band.'}}
```

Prior vs. current salary

```
Prior Base: {{formatMoney(asOfPrimary(dateOf.base - 1, {base}))}}Current
Base: {{formatMoney(base)}}
```

YoY salary change

```
YoY Base Change: {{formatPercent((base - asOfPrimary('2025-01-01', {base})) /
asOfPrimary('2025-01-01', {base}))}}
```

Total weightage validation — confirm goal weights sum to 100%

```
Total Weightage: {{(fieldCode1*100)+(fieldCode2*100)+(fieldCode3*100)}}%
```

```
Extend with +(fieldCodeN*100) for each additional goal weightage field.
```

List a manager's direct reports inline — useful for manager attestation forms

```
{% assign directs = db.job.find{it.manager=person && is:person} %}{% for
direct in directs %}
{{direct.name}} — {{direct.title}}
{% endfor %}
```

```
Great for single manager attestation forms where you want the reviewer to see all their reports in one place without submitting separately per person.
```

Markdown: Conditional Display

Use in profile tabs, the home page, and document templates. {{ }} renders a value. {% %} controls show/hide logic.

Show a block only if a condition is true

```
{% if fieldCode1 >= 4 %}⭐ High performer — eligible for promotion discussion.
{% endIf %}
```

Show different content based on a condition

```
{% if diffYears(startDate, today()) >= 1 %}Eligible for annual review.
{% else %}
Not yet eligible — less than 1 year of tenure.
{% endIf %}
```

Show content only if a field was set on or before a specific date

```
{% if ((fieldCode1:* && dateOf.fieldCode1='2024-11-15') ? asOfPrimary('2024-11-15', {fieldCode1}) : null) %}Rating (as of Nov 15): {{asOfPrimary('2024-11-15', {fieldCode1})}}
{% endIf %}
```

fieldCode1:* confirms a value exists · dateOf.fieldCode1 confirms when it was written · asOfPrimary retrieves the locked value.

Nested conditions

```
{% if department.func='Engineering' %}  {% if fieldCode1 >= 4 %}
  High-performing engineer — flag for promotion discussion.
  {% endIf %}
{% endIf %}
```

Common Filter Queries

Expression	What it returns
is:active	All active employees
is:manager	People managers only
!is:manager	Individual contributors only
department.func='Engineering'	Specific department
!department:'Sales'	Exclude a department
startDate<'2022-01-01'	Started before a date
!fieldCode1:*	Missing a specific field value
fieldCode1>=4	Field at or above a threshold
(base / fieldCode1) < 0.90	Below 90% compa-ratio
diffYears(startDate, today()) >= 3	3+ years tenure
diffMonths(titleDate, today()) >= 18	No title change in 18+ months
diffDays(dateOf.manager, today()) <= 90	Manager changed in last 90 days
diffDays(dateOf.directReports, today()) <= 30	Became a manager in last 30 days
is:open && daysOpen>90	Stale open reqs
!location:*	Missing location
fieldCode1 >= 4 && (base / fieldCode2) < 0.90	High performer, underpaid
anniversary=today	Work anniversary is today
endDateOrg=today+11	Departing in exactly 11 days

⚙ Actions & Approval Chains

```
Carrot powers both the filters that determine who receives an action and the
conditional logic that controls whether an approval stage fires. These are
some of the most common patterns.
```

Trigger an action on a specific date relative to end date

```
endDateOrg=today+11
```

Use = not <= for scheduled actions. Using <= causes the action to fire every day until the date arrives. Replace 11 with however many days of lead time you need.

Trigger an action on work anniversary

```
anniversary=today
```

For orgs that use a custom hire date field instead of the built-in startDate, create a Smart Calc using nextAnniversary(customHireDateField) and filter on that field equaling today instead.

Filter action audience to people who have not yet completed a form

```
findFormTasksByAssessment('Review Name', 'Form Name').filter{with(person,jobFilter) && status:pending}.count() > 0
```

Use this as a scheduled action filter to send reminders only to people who still have outstanding tasks. Swap status:pending for status:done to target completers instead.

Conditional Approval Stage Expressions

The expressions below go in the **"Only include stage if"** field on an approval stage. They control whether a given stage fires at all. Always test your expression as a filter on the scenario Changes tab first — if it returns results there, it will fire in the approval chain.

Trigger only if a specific field changed

```
change.before.base != change.after.base
```

```
Combine multiple fields with ||: (change.before.base != change.after.base) ||
(change.before.fieldCode1 != change.after.fieldCode1)
```

Trigger only if manager changed

```
change.before.manager != change.after.manager
```

Trigger based on total cost impact across all changes in a scenario

```
scenarioChanges.sum{change.cost} > 500000
```

```
Use when you want approval based on the combined salary impact of all
changes, not just a single job. For example: require VP approval when the
total cost of a scenario exceeds $500,000.
```

Trigger if any change in the scenario affects a specific department

```
scenarioChanges.any{department='Engineering'}
```

```
Use when at least one change in the batch needs to match — even if others
don't. Good for routing Engineering Director approval whenever any
Engineering job is touched.
```

Trigger only if every change in the scenario is in a specific department

```
scenarioChanges.all{department='Engineering'}
```

```
Stricter than .any{} — the stage only fires if the entire scenario batch is
within that department. Skip it if the batch is mixed.
```

Trigger based on both scenario content and who is submitting

```
scenarioChanges.all{department='Engineering'} && title='CEO'
```

Combines a condition about the changes with a condition about the submitter. In this example: only include this stage when all changes are in Engineering AND the person submitting is the CEO. Mix and match to build precise routing logic.

Trigger only when a specific person submits a scenario

```
name:'First Last'
```

Set the condition type to **Custom** and use name: with the person's name. Confirmed working pattern for conditional routing based on the submitter's identity.

Reporting & Survey Queries

These functions are used in dashboard charts (Advanced mode) to report on form completion, survey responses, and headcount metrics.

Form completion rate for a review cycle

```
findFormTasksByAssessment('Review Name', 'Form Name').countPercent{status:done}
```

One of the most common dashboard queries for performance and engagement reporting. If the form name contains a colon (:) or has a trailing space, use the form and assessment IDs instead of names — special characters in names can break the query.

Count responses above a threshold for a specific question

```
findAnswers('fieldCode').count{value>=4}
```

Use for single-metric charts on engagement or pulse surveys. fieldCode is the

```
field code of the question, not the form name.
```

Count responses to a form question filtered by org

```
findResponsesByAssessment('Assessment Name', 'Survey
Name').filter{with(submitPerson,jobFilter)}.count()
```

```
Adding .filter{with(submitPerson,jobFilter)} applies your current org chart
filter so the chart respects department, location, or other slices.
```

Survey completion rate with org filter

```
findFormTasksByAssessment('Assessment Name', 'Form
Name').filter{with(person,jobFilter)}.countPercent{status:done}
```

Rollup a field value across a manager's entire team — apply to manager jobs

```
cost + underJobs.sum{it.cost}
```

Average a field across the team:

```
underJobs.mean{it.fieldCode1}
```

```
underJobs traverses the full org tree below a person, not just direct
reports. Great for manager scorecards, team cost rollups, and org chart
visualizations. Use directJobs instead if you only want one level down.
```

Multi-level manager chain — display reporting levels as separate fields

Level 3 (manager's manager's manager):

```
manager.manager.manager
```

Level 4:

```
manager.manager.manager.manager
```

```
Create one Smart Calc field per level. Built-in fields cover levels 1 and 2. Many employees at higher levels will return blank — that's expected. Use ?: '' to suppress null display if needed.
```

Count number of manager changes during tenure

```
findHistoryValues({manager}).count() - 1
```

```
Subtracts 1 to exclude the original hire assignment. Counts across all jobs the person has held at the org.
```

Person Field Resolution

Assign a linked person (e.g., talent partner, buddy) based on conditions

Step 1 — **Smart Bucket:** Each condition outputs a personId value Step 2 — **Smart Calc:** Expression is just the bucket field code:

```
smartBucketFieldCode
```

Step 3 — Set **expected return type to Person** in the Smart Calc settings

```
Use personId — not email. Email does not reliably resolve to the Person type in ChartHop. To find a personId: use the ChartHop API, or reference manager.id as a pattern example.
```

asOf vs asOfPrimary

	asOf	asOfPrimary
Includes scenario/draft data	✅	❌
Use for	What-if / scenario planning	Baselines, historical lookups, audit-safe reporting

```
asOfPrimary('2025-01-01', {base})         base salary on Jan 1 (primary data
only)asOfPrimary('2024-07-01', {fieldCode1})   rating confirmed as of July 1
```

Utility Functions

Function	What it does	Example
round(x, 2)	Round to decimal places	round(fieldCode1, 2)
formatRound(x, 1)	Round + format as string	formatRound(fieldCode1, 1)
formatMoney(x)	Format as currency	formatMoney(base)
formatPercent(x)	Format as percent	formatPercent(fieldCode1)
formatDate(d, 'pattern')	Format date as string	formatDate(startDate, 'MMMM d, yyyy')
abs(x)	Absolute value	abs(base - fieldCode1)
max(a, b)	Larger of two values	max(base, fieldCode1)
min(a, b)	Smaller of two values	min(base, fieldCode1)
mean(a, b, c)	Average, excluding nulls	mean(fieldCode1, fieldCode2, fieldCode3)
length(list)	Count items in list	length(directReports)
diffYears(d1, d2)	Years between dates	diffYears(startDate, today())
diffMonths(d1, d2)	Months between dates	diffMonths(startDate, today())
diffDays(d1, d2)	Days between dates	diffDays(openDate, today())
nextAnniversary(d)	Next anniversary date	nextAnniversary(startDate)
asOf(date, {expr})	Value on date (incl. scenario)	asOf('2024-07-01', {fieldCode1})
asOfPrimary(date, {expr})	Value on date (primary only)	asOfPrimary('2025-01-01', {base})
findHistoryValues({field})	All historical values as list	findHistoryValues({fieldCode1})
vestValue(d1, d2)	Equity vesting value in window	vestValue(today(), nextAnniversary(startDate))
distance(addr1, addr2, unit)	Distance between two addresses	distance(address, location.address, 'miles')

Function	What it does	Example
db.job.find{condition}	Query jobs across the org	db.job.find{it.startDate >= today}

Quick Reference: Common Mistakes

✖ Mistake	✔ Fix
Field is blank and breaks formula	Add ?: 0 — e.g., fieldCode1 ?: 0
mean() averaging zeros as if they're real scores	Use fieldCode1 > 0 ? fieldCode1 : null
Using field code inside .count{}	Use it — e.g., .count{it='Value'}
asOf pulling in draft scenario data	Switch to asOfPrimary for baselines
Person field returning blank	Check Smart Bucket outputs personId, not email
Formula breaks after renaming a field	Field codes don't auto-update — fix references manually
and not working in a specific context	Switch to &&
findHistoryValues returning oldest values first	Add .reversed before .limit()
Dashboard query breaks when form name has a colon or trailing space	Use the form/assessment ID instead of the name
Scheduled action fires every day instead of once	Use = not <= for date-based action filters
Approval chain stage fires even when condition isn't met	Test the expression as a filter on the scenario Changes tab first
findFormTasksByAssessment chart breaks when adding a filter	Use .filter{with(person,jobFilter)} — not with(submitPerson,jobFilter) for task-based queries

12.5. ChartHop for All-(Org-Rollouts)

ChartHop All-Org Rollout Guide

Launching ChartHop to your full organization is an exciting milestone. This guide walks you through everything you need to configure, test, and communicate before your employees log in for the first time.

Phase 1: Review Your Privacy & Visibility Settings

Before rollout, take time to review what your employees will see and adjust any settings that don't match your organization's preferences. All visibility settings live under **Admin > Configuration**.

ChartHop is highly customizable — if there's something you want to hide, restrict, or limit, there's almost always a way to do it. Want to hide the Equity tab from member view? You can. Want to make compensation data only visible to managers? You can do that too. Want to suppress gender or location from public profiles? Easy. Want to mark specific fields as sensitive so only certain roles can see them? Done.

Review your data and think through what each employee type should and shouldn't see. Most of these settings live under **Admin > Configuration**. If you can't find a setting for something specific, reach out to your CSM — custom access controls can typically be configured for edge cases.

Phase 1b: Configure Core Views

Also under **Admin > Configuration**, you can control how key views look and behave for your employees. Work through each view and confirm the defaults are right before rollout.

Org Chart

- **Default fields to visualize** — Choose which field appears on org chart cards by default. Department is the default, but you can change this.
- **Fields to highlight in the visualize menu** — Control which fields employees can toggle on in the visualization menu (e.g., Department, Location, Teams, Tenure, Gender,

Directs, Base – Annualized). Only surface fields that are relevant and appropriate for your members to explore.
- **Card appearance** — Choose whether to show downward and sibling indicators, downward indicators only, or no indicators on org chart cards.
- **Export** — Decide who can export the org chart: Everyone, or only users with Sensitive Data Access.

Profile

- **Header group tags** — Choose which tags display in the profile header (e.g., Department, Location, Business Unit, Product Vertical).
- **Built-in tabs** — Control which tabs are visible on employee profiles. Available tabs include: About, Tasks, Personal History, Job History, Compensation, Equity, Time Off, and Files. Hide any tabs that aren't relevant or shouldn't be visible to members.
    - Within **Compensation**, you can toggle vesting history and currency conversion visibility.
    - Within **Equity**, you can enable the equity value calculator, show company valuation in the calculator, and add a custom About Equity Compensation message.

Data Sheet

- **Export** — Decide who can export data from the Data Sheet, Scenarios, Home page widgets, and Dashboards: Everyone, or only users with Sensitive Data Access.

Job Details Panel

The job details panel appears when an employee clicks on someone in the org chart. Choose which fields are displayed in the panel. Available fields include: Manager, Indirect Manager, Managed Jobs, Directs, Employment Status, Comp Band, Department, Teams, Location, Work Phone, Tenure, Base, Target Variable, Annual Total Comp, and more. Only include fields that are appropriate for your members to see.

Phase 2: Build Out the Employee Experience

With your settings confirmed, focus on making ChartHop useful and welcoming from day one.

Profiles

- **Enable name pronunciations** so employees can record how their name is said. It's a small feature with a big impact on inclusion.
- **Install the About Me Bundle** — a pre-built profile section that gives employees a structured way to introduce themselves. Download it, customize it to fit your culture, and activate it before rollout.
- **Build any custom profile tabs and fields** you want displayed on individual employee pages.
- **Enable Shoutouts** so employees can recognize each other directly on their profiles.

Teams

- **Configure Teams, team forms, and team tabs** so managers and team members have the right tools ready at launch.

Forms

- **Set up 1:1 and performance review note forms** so employees and managers can capture notes during conversations. Make sure they're assigned to the right roles.
- **Decide how employees access forms on day one.** You have two options:
  - Make forms available in ChartHop for employees to find when they log in.
  - Use Actions to push forms to employees automatically on their start date.

Automated touchpoints

- **Set up Actions for anniversaries and shoutouts** to automatically send emails or messages when employees hit work milestones. These run in the background without any manual effort.

Phase 3: Configure Access & Invitations

Go to **Access > Settings** to configure how employees are invited and how they log in.

Set up SSO

SSO (Single Sign-On) allows employees to log into ChartHop using your organization's existing identity provider — no separate ChartHop password required. This is strongly recommended as it's easier for employees and more secure.

Two things need to happen for SSO to work:

1. **Enable SSO in ChartHop** — Under **Access > Settings > SSO**, check the box for your organization's identity provider (Google, Microsoft, Okta, OneLogin, Azure Active Directory, SAML v2, or ADP).
2. **Configure SSO on your IT side** — Your IT team will need to set up ChartHop as an application within your identity provider. Loop in your IT team early so this is ready before invitations go out.

Until SSO is configured end-to-end, employees won't be able to log in. Don't send invitations until both sides are confirmed.

Configure automatic invitations

Under **Access > Settings > Automatically Invite Users**, configure how ChartHop handles invitations and access:

1. Check **"Automatically invite new employees and revoke access on departure"** to keep access in sync with your HRIS automatically.
2. Set the **role** new employees are assigned — the default is *Employee*, which is the standard access level for most members of the organization.
3. Under **Advanced Options**:
    - When you're ready to launch, enable **"Send invitations and revoke access once daily"** (recommended). Leave this unchecked until you're ready for invitations to go out.
    - Configure **"Revoke access when employee departs"** based on your offboarding preferences.
    - Use the **"Only invite employees that match this filter"** field to limit the rollout to a specific group (e.g., dept:sales) — useful for running a pilot before going org-wide.
    - Add anyone who should be **notified when a user is invited or access is revoked**.

Customize your invitation email

Under **Access > Settings > Invitation Email**, customize what employees receive when they're invited:

- Update the **subject line** and **button text** to match your company's voice.
- Edit the **invitation body** to add context about why you're rolling out ChartHop and what employees should do first.

- Use **"Send test email"** to preview what employees will receive before going live.

Make it fun

A great launch drives curiosity and gets people to actually log in on day one. Consider pairing your invitation email with a launch moment — whether that's a separate email from HR, a Slack announcement, or a kick-off at your next all-hands. Here are some ideas customers have used successfully:

- **Scavenger hunt** — Challenge employees to find something specific in ChartHop (a teammate's fun fact, a hidden org chart detail, a shoutout) and reply to HR to win a gift card. First 5 to respond wins.
- **Profile completion contest** — Ask employees to fill out their About Me profile within the first week. Raffle a prize among everyone who completes it.
- **Shoutout challenge** — Encourage employees to send their first Shoutout to a teammate. Highlight a few of the best ones in your next all-hands or company newsletter.
- **Trivia** — Hide a fun fact somewhere in ChartHop and ask employees to find it. First one to email HR with the answer gets a prize.

The goal is to give employees a reason to log in and poke around on day one — the more they explore, the more value they get out of the platform.

Configure user management settings

Also under **Access > Settings > User Management**, set:

- **Require sign-in every X days** — how often employees must re-authenticate.
- **Sign out after inactivity** — automatic sign-out after a period of inactivity.
- **New user invitations expire after X days** — how long an invitation link stays valid.
- **Notify these people of user access level changes** — who on your team should be alerted when access changes.

Phase 4: Customize the Home Dashboard

The home dashboard is the first thing employees see when they log in — make it feel like yours. There are two things to configure: your welcome message and your home page widgets.

Welcome message

Go to **Org Settings** (gear icon, bottom left) to update the welcome message. Consider including:

- A welcome note from HR or leadership
- Quick links to key resources (e.g., SharePoint, employee handbook, benefits portal)
- An image of your company values or a team photo

Home page widgets

Choose which widgets appear on the home page and configure each one to match what's relevant for your organization. The available widgets are:

- **People Moves** — Surfaces recent org changes. Choose which change types to display (Hires, Departures, Moves, Manager Changes, Title Changes) and set the time window for how many days in the past and future to show.
- **Open Jobs** — Displays open roles from your ATS. You can opt to only show jobs that match each employee's location.
- **Milestones** — Highlights upcoming Birthdays and Anniversaries. Set the time window for how far in the future and past to surface events.
- **Weekly Calendar** — Shows the week at a glance. Toggle on weekends if your organization works a non-standard week.

Turn off any widgets that aren't relevant for your employees — a clean, focused dashboard makes a better first impression than one that's cluttered with information they don't need.

Phase 5: Test Before You Launch

1. **Validate your data.** Review the primary fields employees will see: org hierarchy, department, job title, and personal information. Email support@charthop.com if anything looks inaccurate.
2. **Test visibility using "View As."** This is one of the most important things you can do before rollout. Click your profile picture in the top right of your screen and select an employee to impersonate — you'll see ChartHop exactly as they see it. Use this to confirm employees can access what they should and, just as importantly, that they *can't* access what they shouldn't. Test a few different people across roles, levels, and

departments to get a complete picture. If something looks off, head back to **Admin > Configuration** and adjust before invitations go out.

3. **Run a pilot with 3–5 people.** Invite a small group of trusted employees before the full rollout. Give them a few days to explore and share feedback — this is your safety net for catching any issues before go-live.
4. **Email support@charthop.com** if anything is visible that shouldn't be.

Phase 6: Communicate & Launch

Prepare your communications

- Draft your rollout email to employees. Your CSM has sample templates you can use or adapt.
- Create introductory collateral — a slide deck, a recorded demo, or both. Before recording, use the eye icon in the sidebar to hide any sensitive information from your screen.

Schedule Launch Office Hours

Plan 30-minute sessions for the first 3–4 weeks after go-live. These give employees a place to ask questions and give HR a venue to share tips. Bring any questions you can't answer to support@charthop.com or your CSM.

Go live

When everything above is confirmed, go to **Access > Settings > Automatically Invite Users**, check **"Send invitations and revoke access once daily"**, and your invitations will go out.

Pre-Launch Checklist

Task	Done ?
Visibility settings reviewed in Admin > Configuration	☐
Dashboard people moves configured	☐
Name pronunciations enabled	☐
About Me Bundle installed and customized	☐
Custom profile tabs and fields built	☐
Shoutouts enabled	☐
Teams, team forms, and tabs configured	☐
1:1 and performance review note forms built	☐
Day-one forms configured (self-serve or Actions-triggered)	☐
Anniversary and shoutout Actions set up	☐
SSO enabled in ChartHop (Access > Settings > SSO)	☐
SSO configured on IT/identity provider side	☐
Auto-invite configured in Access > Settings (role, filters, daily send unchecked until ready)	☐
Invitation email customized or ChartHop email turned off	☐
User management settings configured (sign-in frequency, invitation expiration)	☐
Dashboard welcome message updated	☐
Data validated and "View As" tested	☐
Pilot group completed	☐
Rollout email drafted and approved	☐
Launch Office Hours scheduled	☐

12.5.1. Ask ChartHop for Org Rollouts

You can use **Ask ChartHop** to help with your Org Rollout!

12.5.2. Org Rollout Toolkit

All-Org Rollout Toolkit

Everything you need to launch ChartHop to your entire organization — from executive sponsorship and talking points to day-one employee communications. Download, customize, and go.

Start Here: Core Planning

Align your messaging and prepare your project sponsor before anything goes out to the org.

Talking Points

The foundation for all rollout communications. Core messaging on what ChartHop is, why you're rolling it out, and audience-specific talking points for every group.

↓ Download PDF

Project Sponsor Video Script

Fill-in-the-blank scripts for your executive announcement. Includes a 60–90 sec pre-launch version and a 30–45 sec go-live version, plus recording tips.

↓ Download PDF

Announcement Communications

Build awareness early — post across multiple channels 3–4 weeks before go-live.

✉ Announcement Email Templates

Project Sponsor email templates for five audiences — internal team, leaders, HR admins, managers, and all employees. Each answers the key questions your audience will have.

↓ Download PDF

Announcement Communication Templates

Ready-to-use copy for your intranet/employee portal, Slack or Teams, and company newsletter. Spark interest and reduce uncertainty before go-live.

↓ Download PDF

Pre-Launch Enablement

Send these 1–2 weeks before go-live to drive training and build launch-day confidence.

⚡ Enablement Communication Templates

The full countdown kit: manager readiness email (T-14), employee readiness email (T-7), go-live day email, intranet portal copy, Slack/Teams countdown messages, and an internal newsletter block.

↓ Download PDF

How to Use This Toolkit

1. **Start with the Talking Points.** This is your messaging foundation — fill in your company name, goals, timeline, and audience-specific benefits first.
2. **Prepare your Project Sponsor.** Send them the email templates and ask them to send the leader and all-employee emails on your announcement date.
3. **Post announcement communications 3–4 weeks before go-live** across your intranet, Slack/Teams, and company newsletter.
4. **Send enablement comms 1–2 weeks out.** Manager email at T-14, employee email at T-7, and countdown Slack messages at T-3 and T-1.
5. **Launch!** Send the go-live day email and Slack message first thing in the morning. Have your People team standing by.

Before distributing: All templates include highlighted placeholders for your organization's specifics. Delete all instruction boxes before sending anything externally. Questions? Contact your ChartHop CSM or email support@charthop.com.

12.5.3. Launch Email Templates

ChartHop Launch Email Templates

Use these templates as a starting point — but please customize them before sending. Fill in the bracketed sections, remove any features your organization hasn't purchased, and make it sound like you. The more personal it feels, the more likely employees are to actually log in.

Email 1: For the Whole Team (Option One)

Subject: We're launching ChartHop — here's your invitation

Hi team,

Starting today, [Company] is rolling out ChartHop — and we're really excited about this one.

We brought ChartHop in because [insert your why — e.g., "we wanted one place for everything people-related instead of five different systems" / "we wanted to give every employee more visibility into the org" / "we wanted a better way to run performance reviews and actually act on engagement feedback"]. After using it on the HR side for a while now, we can't wait for you to get your hands on it.

You'll receive your invitation to log in shortly. When you do, start by updating your profile — it takes five minutes and it makes a real difference in how connected we feel as a team.

More to come as we get rolling. Questions? Just reply to this email.

[Your name] [Title]

Email 2: For the Whole Team (Option Two)

Subject: Something we've been working on for you

Hi [Company] team,

We've been building toward this for a while, and we're really happy it's finally here.

Today we're launching ChartHop — a platform we chose specifically because [insert your why]. Whether you're looking up a colleague, completing a performance review, sharing feedback, or requesting time off [remove if not applicable], it's all going to live in one place now.

We know a new tool can feel like one more thing. But we genuinely think this one will make your day-to-day easier — and we wouldn't be rolling it out if we didn't believe that.

Your invitation is on its way. When it arrives, log in, look around, and send a Shoutout to someone who deserves one. That's it for now.

[Your name] [Title]

Email 3: For Launching with a Contest / Scavenger Hunt

Subject: □ ChartHop is live — log in and you could win

Hi team,

ChartHop is officially live — and to celebrate, we're making it a little competitive.

Here's the challenge:

1. Log in using your invitation
2. Complete your About Me profile (photo, fun fact, name pronunciation)
3. Reply to this email with your favorite thing you found

First [X] people to do all three win [gift card / prize].

ChartHop is where [Company]'s people operations will live — from [performance reviews and goal setting] to [engagement surveys] to simply finding out who does what across the org [customize to your features]. We'll share more about everything it can do over the coming weeks.

For now — go explore.

[Your name] [Title]

Email 4: For Managers

Subject: ChartHop is live — a quick note for managers

Hi [managers / team],

We're launching ChartHop to the full company this week, and we wanted to give you a heads up on what this means for you specifically.

As a manager, ChartHop gives you a real home base for your team. You'll have your org chart, your team's profiles, and your HR processes — [performance reviews, goal tracking, engagement results, compensation planning, headcount planning — remove what doesn't apply] — all in one place instead of scattered across emails and spreadsheets.

We think it's going to make your job easier. And your team is going to love having access to it too.

Your invitation is on its way. Start by exploring your team in the org chart — and if you have questions, we're hosting office hours every [day] at [time] for the first few weeks.

[Your name] [Title]

12.6. Dashboards

Dashboards are ChartHop's reporting tool — a flexible way to visualize, monitor, and share people data across your organization. Whether you're tracking headcount trends, measuring turnover, or surfacing performance review results, dashboards bring your data together in one place.

What You Can Do with Dashboards

- **Monitor workforce metrics** like headcount, attrition, and compensation in real time
- **Track changes over time** with time series charts showing trends month over month or quarter over quarter
- **Slice data by any dimension** — department, location, level, employment type, and more
- **Analyze form and survey responses** from performance reviews and engagement surveys
- **Personalize the experience** so each employee sees data relevant to them
- **Add AI-generated summaries** that translate chart data into plain-language narratives

How Dashboards Are Structured

A dashboard is made up of three types of content blocks that you arrange on a canvas:

Charts display your people data visually. You choose the chart type (bar, line, pie, etc.) and write a formula that defines what data is shown. Charts can display a single value, a breakdown across groups, or a trend over time.

Text Blocks display written content alongside your charts. They can include static text, AI-generated summaries of chart data, or dynamic fields that populate with information specific to the person viewing the dashboard.

Headers organize your dashboard into sections, making it easier to navigate.

How Data Is Calculated

ChartHop calculates dashboard charts by evaluating your formula across the time period you've selected. For time series charts, it breaks the period into individual intervals (e.g., each month) and calculates each one independently — the same way the Data Sheet would if you looked up that date directly. This ensures your dashboard results are always consistent with what you see elsewhere in ChartHop.

Charts that track changes — like new hires or departures — are calculated within each interval's window, so every bar or data point reflects only what happened during that specific period.

Who Can See What

Dashboards can be shared across your organization or scoped to specific audiences. Because text blocks and chart filters can be tied to the viewer's own profile data, a single dashboard can surface personalized, relevant information for every employee without needing to build separate versions for each team or role.

Where to Go Next

- **Building your first chart** → See the "How to Build & Customize"
- **Tracking hires, departures, and promotions** → See Change Tracking
- **Reporting on performance reviews or surveys** → See Form & Survey Responses
- **Adding AI summaries and personalized text** → See Text Blocks

12.6.1. Building HTML Tables in Text Blocks

Text blocks in ChartHop dashboards support raw HTML, which means you can build a fully formatted, styled table using a `<table class="ch-table-1">` element combined with CQLT (template expressions). This is especially useful when you need a custom multi-row table that responds to dashboard filters — but where the native chart types don't give you exactly the layout you want.

When to Use This

- You want a table that displays computed metrics side by side (e.g., review scores across multiple categories)
- You need 20+ versions of the same dashboard with different filters — and want one flexible text block that adapts to `jobFilter`, rather than rebuilding native chart tables for each version
- The data you're displaying comes from long or complex CQL expressions (like custom scoring calculations) that don't map cleanly to a native chart formula

How It Works

Inside a Text Block, you can write HTML directly. ChartHop will render it as formatted content. Wrap any CQL expression in `{{ }}` to have it evaluated dynamically — just like you would in any other template expression.

The class `ch-table-1` applies ChartHop's standard table styling, so your table visually matches the rest of the dashboard.

Basic Structure

```
<table class="ch-table-1">
  <thead>
    <tr>
      <th>Category</th>
      <th>Score</th>
    </tr>
  </thead>
  <tbody>
    <tr>
      <td>Overall Performance</td>
      <td>{{ findAnswersByAssessment('managerReviewRating', 'H1 Performance Review').filt
    </tr>
    <tr>
      <td>Values Alignment</td>
      <td>{{ findAnswersByAssessment('valuesRatingManager', 'H1 Performance Review').filt
    </tr>
  </tbody>
</table>
```

Available Variables

Text blocks have access to three key dashboard variables that make your table dynamic and filter-aware:

Variable	What It Represents
`jobFilter`	The audience/filter the dashboard viewer has currently applied (e.g., filtered to Engineering, or a specific manager's team)
`intervalFrom`	The start of the reporting period selected on the dashboard (inclusive)
`intervalUntil`	The end of the reporting period selected on the dashboard (exclusive — i.e. the day *after* the last day in the period)

Using all three means your table responds fully to whatever the viewer has configured — both in terms of *who* is in scope and *when*.

These are the same variables used in time-series chart formulas, so if you're already familiar with `intervalFrom` / `intervalUntil` from building charts, they work exactly the

same way here.

Example: using all three variables

```
<td>{{ findHires(intervalFrom, intervalUntil).filter{jobFilter}.count() }}</td>
```

This counts new hires within the selected date range, scoped to the active filter.

Using `jobFilter` Inside the Table

Because this is a Text Block, the `jobFilter` variable is available — it reflects whatever filter the dashboard viewer has currently applied (e.g., filtered to Engineering, or a specific manager's team).

You can pass `jobFilter` directly into your CQL expression:

```
<td>{{ db.job.find(jobFilter).mean{baseComp.annualized} }}</td>
```

This means a single text block table can power 20+ filtered dashboard versions without any changes — just apply a different audience or department filter on the dashboard itself.

Real-World Example: Multi-Score Review Summary Table

This example displays average scores across several review dimensions, filtered to whoever is in scope:

```
<table class="ch-table-1">
  <thead>
    <tr>
      <th>Review Dimension</th>
      <th>Avg Score</th>
    </tr>
  </thead>
  <tbody>
    <tr>
      <td>Overall Performance</td>
      <td>{{ findAnswersByAssessment('managerReviewRating', 'H1 2025 Review').filter{jobI
    </tr>
    <tr>
      <td>Impact</td>
      <td>{{ findAnswersByAssessment('impactCompetency', 'H1 2025 Review').filter{jobFil
    </tr>
    <tr>
      <td>Collaboration</td>
      <td>{{ findAnswersByAssessment('collaborationCompetency', 'H1 2025 Review').filter
    </tr>
    <tr>
      <td>Knowledge</td>
      <td>{{ findAnswersByAssessment('knowledgeCompetency', 'H1 2025 Review').filter{jobI
    </tr>
  </tbody>
</table>
```

Tips

- **Always use** `ch-table-1` as the class — this applies ChartHop's built-in table styling and keeps it visually consistent with native chart tables.
- **Column headers are static HTML** — only the cell values need template expressions. Keep headers as plain text in `<th>` tags.
- **Expressions are evaluated server-side** — if a formula returns no data (e.g., no responses exist for a filter), the cell will render as empty rather than erroring.
- **This does not replace native Table charts** for most use cases — if the built-in Table chart type works for you, use it. This approach shines when you need custom layouts,

multi-source data in one table, or highly specific expression logic that the native chart type can't express.

ChartHop Dashboards: How to Build & Customize

What You Can Add to a Dashboard

Block Type	What It Does
Chart	Visualizes data (bar, line, pie, etc.)
Text Block	Displays dynamic text, AI summaries, or personalized messages
Header	Organizes sections with a title

Key Concepts & Definitions

jobFilter — The combination of filters a user has selected on the dashboard (e.g., filtered to Engineering, or New York). Always include this in your formula so your chart responds to those selections.

intervalStart / intervalUntil — When a chart displays data over time (e.g., month by month), each bar or data point represents one interval. intervalStart is the first day of that period, and intervalUntil is the first day of the *next* period. These are dynamic variables automatically set by the reporting engine for each period — you don't type dates manually here.

```
Example: For the January bar on a chart, intervalStart = '2026-01-01' and
intervalUntil = '2026-02-01'. For February, they shift automatically to
'2026-02-01' and '2026-03-01'.
```

target — The person a form response is *about* (e.g., the employee being reviewed).

submit — The person who *submitted* the form response (e.g., the manager filling out a review).

groupBy{} — Groups results by a field (like department or location), automatically updating as your org changes. No manual edits needed when teams are added or renamed.

value — The actual response value from a form (a score, rating, or text answer).

Chart Types

When adding a chart to your dashboard, you can choose how the data is displayed. The formula you write determines what data shows up — the chart type determines how it looks.

Chart Type	Best Used For
Bar / Column Chart	Comparing values across groups (e.g., headcount by department)
Line Chart	Showing trends over time (e.g., headcount growth month over month)
Pie / Donut Chart	Showing proportional breakdown (e.g., workforce by employment type)
Single Value	Displaying one number or metric prominently (e.g., total headcount, current turnover rate)
Gauge	Visualizing a metric against a target or range (e.g., turnover rate vs. goal)
Table	Showing detailed, multi-column data side by side
Crosstab Table	Comparing two dimensions at once (e.g., headcount by department and gender)
NPS Chart	Displaying Net Promoter Score breakdowns from survey data
Bubble Chart	Exploring individual-level people data across up to four dimensions (X axis, Y axis, size, and color) — available in Data Explorer

Time Series Charts

Any chart can be displayed as a **time series** — meaning ChartHop will calculate your formula for each time period (monthly, quarterly, etc.) and plot them together. This is what powers over-time reports like headcount growth, monthly new hires, or rolling turnover rate.

To make a chart work correctly as a time series, use intervalStart and intervalUntil in your change or form response functions. The engine automatically substitutes the correct dates for each period.

```
Example: A bar chart using findHires(intervalStart, intervalUntil).count()
will show a separate bar for each month, each reflecting only the hires from
that month.
```

Data Explorer

Data Explorer is an interactive, full-screen environment for exploring your people data. Unlike standard dashboard charts that display aggregate data, Data Explorer surfaces individual-level data points — making it ideal for spotting patterns across your workforce. Clicking on a person opens their side panel so you can drill directly into their profile. Charts built in Data Explorer can be added directly to any dashboard. One of its most powerful uses is building a **Nine Box** visualization by plotting two performance or potential rating fields against each other.

How Chart Formulas Work

Every chart formula follows the same pattern:

```
db.job.find(jobFilter).[optional: groupBy{field}].[calculation]
```

Part	What It Does
db.job	Look in the jobs table
.find(jobFilter)	Respect the dashboard's active filters
.groupBy{field}	(Optional) Break results into groups
.sum{} / .count() / .mean{}	Calculate the number

Brackets & syntax

Use { } curly braces around filters and expressions (e.g., {department="Engineering"}), and ( ) parentheses only for function call parameters (e.g., find(jobFilter)). Mixing these up is one of the most common formula errors.

Common Chart Formulas

Goal	Formula
Total headcount	db.job.find(jobFilter).sum{headcount}
Number of employees	db.job.find(jobFilter).count()
Average base salary	db.job.find(jobFilter).mean{baseComp.annualized}
Headcount by department	db.job.find(jobFilter).groupBy{department}.sum{headcount}
Headcount by location	db.job.find(jobFilter).groupBy{location}.sum{headcount}
Avg salary by level	db.job.find(jobFilter).groupBy{level}.mean{baseComp.annualized}
Headcount by dept & gender	db.job.find(jobFilter).groupBy{department, gender}.sum{headcount}

Tracking Hires, Departures & Promotions

Use these functions to report on workforce changes. Use intervalStart and intervalUntil as the date parameters in dashboard charts — the engine automatically substitutes the correct dates (e.g., '2026-01-01', '2026-02-01') for each period.

Goal	Formula
New hires	findHires(intervalStart, intervalUntil).count()
Departures	findDepartures(intervalStart, intervalUntil).count()
Promotions	findPromotions(intervalStart, intervalUntil).count()
Hires in Engineering	findHires(intervalStart, intervalUntil).filter{dept:engineering}.count()
Hires by department	findHires(intervalStart, intervalUntil).groupBy{department}.count()
Voluntary departures	findDepartures(intervalStart, intervalUntil).filter{depart:voluntary}.count()

Turnover Rate

```
turnoverRate(fromDate, untilDate[, jobFilter][, departFilter])
```

Calculated as: departures ÷ average(headcount at start, headcount at end)

Goal	Formula
Overall turnover (rolling 12 months)	turnoverRate('-1y+1d', intervalUntil)
Voluntary turnover only	turnoverRate('-1y+1d', intervalUntil, jobFilter, {depart:voluntary})
Voluntary turnover in Engineering	turnoverRate('-1y+1d', intervalUntil, {dept:engineering}, {depart:voluntary})

Analyzing Form & Survey Responses

Terminology reminder

- **target** = the person the form is *about* (e.g., the employee being reviewed)
- **submit** = the person who *submitted* the form (e.g., the reviewing manager)

Finding your question field ID

Every form question in ChartHop is linked to a field ID (e.g., managerReviewRating). You'll need this to write chart formulas for survey or review data. To find it, open the form editor and look for the **Copy question ID to clipboard** button on the question you want to report on.

Pull responses from any form

```
findAnswers('fieldName', fromDate, untilDate)
```

Goal	Formula
Average rating score	findAnswers('managerReviewRating', intervalStart, intervalUntil).mean{value}
Avg rating grouped by reviewee's department	findAnswers('managerReviewRating', intervalStart, intervalUntil).groupBy{target.department}.mean{value}
Ratings submitted by Engineering, about people in Sales	findAnswers('rating', intervalStart, intervalUntil).filter{submit.department:engineering and target.department:sales}.mean{value}

Pull responses from a specific review or survey

```
findAnswersByAssessment('fieldName', 'Assessment Name')
```

The assessment name must match exactly as it appears in ChartHop, including capitalization.

Goal	Formula
Avg rating from a specific review, grouped by reviewee's dept	findAnswersByAssessment('downwardRating', '1H Performance Review').groupBy{target.department}.mean{value}
Favorable response % for an engagement question	(findAnswersByAssessment('questionId', 'Engagement Survey').count{value="Agree"} + findAnswersByAssessment('questionId', 'Engagement Survey').count{value="Strongly Agree"}) / findAnswersByAssessment('questionId', 'Engagement Survey').count()
eNPS score grouped by team	findAnswersByAssessment('questionId', 'Q4 Engagement Survey').groupBy{submit.team}.nps{value}

Calculating NPS

Instead of manually writing out promoter and detractor counts, use the built-in .nps{} method:

```
findAnswersByAssessment('questionId', 'Assessment
Name').groupBy{target.department}.nps{value}
```

This calculates NPS automatically based on response values (9–10 = promoters, 7–8 = passives, 0–6 = detractors).

Fields available for filtering or grouping

Field	Definition
value	The response value (score, rating, text)
target	The person the form is about
target.department	Department of the person being reviewed
submit	The person who submitted the form
submit.department	Department of the person who submitted
date	Date the response was submitted

Customizing Chart Labels & Display Options

Editing labels — Chart labels appear greyed out but are editable. Click directly on a label to rename it. A reset icon appears once you've made a change, which reverts it back to the default.

Controlling what groups appear — In the chart's Sort/Show settings, two checkboxes let you control grouping behavior:

- **Group remaining as "Other"** — rolls up any groups outside your top N into a single "Other" bucket
- **Include "None" in results** — shows records where the grouped field has no value

Chart-level filters vs. formula filters — If you add a filter at the top of the chart AND inside your groupBy{} formula, they work independently and won't override each other. Use the chart-level filter for broad audience scoping and the formula-level filter for specific calculation logic.

Sharing Dashboards

Access Level	What They Can Do
Owner	Full edit access, can share with others
Editor	Can edit charts and content
Viewer	Can view the dashboard; can apply filters if the dashboard does not use full data sharing

Note on filtering: Viewers can only use dashboard filters if the dashboard is set to **normal data access**. If a dashboard uses full data sharing (exposing all org data regardless of the viewer's permissions), filters are intentionally disabled as a privacy safeguard.

Text Blocks: Dynamic & Personalized Content

Wrap any field in {{ }} and it populates with the viewer's own data:

```
You are part of the {{department}} department.Your manager is {{reportsTo}}.
```

Every employee sees their own information — no need to duplicate dashboards by team.

Add an AI Summary of any chart

```
{{summarizeChart(reportId, 'Chart Name Exactly As It Appears')}}
```

The chart name must match exactly, including capitalization.

Quick-Reference Cheat Sheet

```
# Headcount snapshotdb.job.find(jobFilter).sum{headcount}

# Headcount by department (auto-updates)
db.job.find(jobFilter).groupBy{department}.sum{headcount}

# New hires this period by department
findHires(intervalStart, intervalUntil).groupBy{department}.count()

# Voluntary turnover rate (rolling 12 months)
```

```
turnoverRate('-1y+1d', intervalUntil, jobFilter, {depart:voluntary})

# Average performance rating by reviewee's department
findAnswers('performanceRating', intervalStart,
intervalUntil).groupBy{target.department}.mean{value}

# eNPS by team
findAnswersByAssessment('questionId', 'Assessment
Name').groupBy{submit.team}.nps{value}

# Favorable response % for an engagement question
(findAnswersByAssessment('questionId', 'Engagement
Survey').count{value="Agree"} + findAnswersByAssessment('questionId',
'Engagement Survey').count{value="Strongly Agree"}) /
findAnswersByAssessment('questionId', 'Engagement Survey').count()

# AI summary of a chart
{{summarizeChart(reportId, 'Headcount')}}

# Personalized text for the viewer
You are in the {{department}} department, reporting to {{reportsTo}}.
```

Tips & Known Behaviors

- **Building a column-style table?** Temporarily disable the reporting engine, create your chart, then re-enable it.
- **Comparing to a prior period?** Use asOf('-1m', {...}) to pull data from a past point in time and subtract from the current value.
- **Chart not responding to filters?** Make sure jobFilter is included in your .find() call.
- **Chart showing 0 values?** Bar and column charts suppress zero results by default. If you need zeros to appear, use a Crosstab Table instead.
- **AI summaries not respecting dashboard filters?** The AI summary reflects the underlying chart data. Make sure your charts include jobFilter so the summary reflects the filtered view.
- **Currency in charts:** All monetary values are converted to your organization's primary currency. If your org spans multiple countries, be aware that dashboard charts normalize everything to the org-level currency.
- **"Other" grouping and filters:** The "Other" bucket is calculated at submission time, not dynamically. Applying a manager-level or audience filter after the fact will not re-calculate what falls into "Other."

- **Filtering out specific groups:** You can filter out a specific group value using {field!="Value"} in your formula. However, for multi-select fields like Teams, filtering out one value may remove a person from all groups they belong to — not just the filtered one. In those cases, build each group as a separate formula line rather than using exclusion filters.
- **De-identified survey dashboards:** Use findAnswersByAssessment() to pull results. Groupings like department or location are calculated at submission time, not dynamically per manager filter — this can occasionally surface small group results unexpectedly.

12.7. Performance Reviews

Performance reviews in ChartHop can be as simple or as sophisticated as you need them to be. We've seen everything from lightweight manager check-ins with three questions to elaborate 360-degree cycles with calibration workflows and competency matrices. The platform flexes to match your process — the key is designing intentionally for what actually works for your organization.

Understanding What Performance Reviews Are For

Performance reviews in ChartHop are designed for feedback that's *about specific people* — whether that's self-reviews, manager reviews of direct reports, peer feedback, or upward reviews. The key principle: if you're asking someone to provide feedback about a specific reviewer or another identified person, that belongs in Performance Reviews.

What belongs in Performance Reviews:

- Manager reviews of direct reports
- Self-assessments
- Peer feedback (360-degree reviews)
- Upward feedback (reports reviewing their managers)

What doesn't belong here: If you're sending a form that's about no one in particular or is a deidentified survey (like pulse surveys, engagement feedback, or anonymous team health checks), use the Engagement module instead. Performance Reviews is built for identified, person-specific feedback that ties to your org chart.

Setup Principles That Work Across Any Cycle

Start with clean org chart data. Whether you're running a simple or complex cycle, ChartHop pulls review relationships from your reporting structure. Recent transfers, dotted-line reports, managers covering multiple teams — handle these scenarios before launch, not during.

Be realistic about timelines. Build in buffer time. If you want reviews completed by a specific date, set your deadline a few days earlier. If you're running multi-stage reviews

(self + manager + peer), stagger those deadlines so each phase completes before the next begins.

Design your visibility intentionally. When can employees see their reviews? What can they see? This varies wildly by company — some share everything immediately, others wait until after calibration. Either approach works in ChartHop, just decide upfront and configure accordingly.

Think through your data flow. If performance ratings connect to compensation, promotions, or succession planning, map those connections early. The more integrated your processes, the more valuable your review data becomes.

What Makes Cycles Run Smoothly

Pilot before full launch. Whether you're running something simple or complex, test with a small group first. They'll catch configuration issues and process questions you didn't anticipate.

Automate communications. Set up reminders at key intervals. Create clear documentation for managers. The more you can automate and systematize, the less ad-hoc support you'll need to provide.

Plan for edge cases. New hires, employees on leave, recent transfers, open roles — decide how to handle these situations before they become questions.

Keep forms focused. Even in complex cycles, less is often more. Every question should serve a clear purpose. More questions don't automatically mean better data.

Common Challenges (Regardless of Complexity)

The surprise launch: Always coordinate your ChartHop launch with your internal communications.

Visibility mishaps: Test your settings thoroughly. Make sure people see what they're supposed to see, when they're supposed to see it.

Mid-cycle changes: Reporting relationships shift, people transfer, managers go on leave. Decide upfront how you'll handle these situations — freezing relationships at cycle launch versus allowing real-time updates.

Performance reviews in ChartHop work for everyone from 50-person startups running their first structured review to 15,000-person enterprises with sophisticated multi-rater cycles. The platform adapts to your process. Your job is designing something that fits your culture, your capacity, and your goals — then letting ChartHop handle the execution.

12.7.1. Planning Your Performance Review Cycle

Planning Your Performance Review Cycle

Running a performance review cycle in ChartHop involves more moving parts than it might first appear — and the order you build them in matters. This guide walks you through the full picture before you dive into setup, so nothing surprises you mid-cycle.

How the pieces fit together

Every performance cycle in ChartHop is built from four components, and they have a dependency order:

Forms → Automated Actions → Profile Tabs → Review Cycle

Build your forms first — one per review direction (self, manager, peer, upward). Then configure automated actions so downstream forms trigger at the right moment. Then set up profile tabs so managers can approve and release feedback from employee profiles. Only then create the review cycle and attach everything together.

Skipping steps or building out of order is the most common cause of cycle issues. Map your full flow before you build anything.

Before you build: key decisions

A few decisions should be made before you touch a single form. Get these wrong and you'll be reconfiguring mid-cycle.

Start with a clean org chart

ChartHop pulls review assignments directly from your reporting structure. Before any cycle begins, make sure recent transfers, dotted-line reports, and manager assignments are accurate. This is one of the most common causes of reviews going to the wrong people — and it's much harder to fix mid-cycle than before launch.

Questions vs. fields

Every form item is either a question or a field — and this distinction matters more than it first appears.

	Field	Question
What it is	A ChartHop data point tied to a person's record	A standalone form input — not tied to any record
Lives on profile?	Yes — written to the employee's profile	No — only exists within the form response
Queryable in datasheets/reports?	Yes — accessible via field code across ChartHop	No — only accessible via answerValue in dashboards
Best for	Rating scales, performance scores, any data you want to surface, track over time, or use in comp reviews	Open-ended comments, supplementary narrative

The rule: if you ever want to display a rating on a profile tab, filter by it in a datasheet, use it in a compensation review, or track it over time — it must be a field, not a question. A "Manager Performance Rating" that feeds into a comp cycle should be a field. A "Please share any additional context" text box can be a question.

Fields are created and managed in **Settings → Fields**. Before building any form, confirm whether the fields you need already exist or whether new custom fields need to be created. Custom fields support single-select, multi-select, yes/no, date, text, numeric, and calculated (expression-based) types.

Visibility and release

When can employees see their own reviews? Some organizations release feedback immediately on submission. Others hold it until after calibration, or until managers have had a 1:1 conversation. ChartHop supports both — but you need to decide upfront and configure your form sensitivity settings accordingly. One of the most common regrets after a cycle launches is "we didn't think through who sees what, and when."

Data flow downstream

If performance ratings will feed into a compensation review, promotion workflow, or succession planning process — map those connections before you build your forms. Fields

that need to flow downstream must be set up as custom fields from the start. Questions don't flow anywhere.

Step 1: Build your forms

Navigate to **People Ops Tools → Forms**. Only users with Owner or Technical Owner access can create or edit forms.

You'll need a separate form for each review direction you're running:

- Self review
- Manager review (downward)
- Peer review — requires two forms: a peer selection form and a peer feedback form
- Upward review (if applicable)

Build and fully configure each form before moving on. The decisions that differ by type — sensitivity settings, anonymity, release configuration — are covered in the individual setup guides for each review type.

Form settings: what they mean

Once your form is built, go to the **Settings** tab. Here's what each setting controls:

Status

- **Active** — the form can collect responses, appear on profiles, and be used in review cycles
- **Inactive** — the form cannot collect responses and won't appear anywhere
- **Archived** — hidden from the forms list; use for retired cycles

Set forms to Inactive until you're ready to launch. Don't leave test forms Active.

Approvals Toggle on if a form response needs to be reviewed and approved before it's finalized. You can set the approver as the manager or manager's manager. Use this for workflows like manager reviews that need HR sign-off before ratings are released.

Anonymity Controls whether respondent identity is visible. For performance reviews this is typically off. Note: ChartHop Performance Reviews is not designed for fully anonymous deidentified feedback — that belongs in the Engagement module.

Save/Edit After Submission Controls whether forms can be edited after submission. For multi-stage cycles where a self-review should be locked before the manager review opens, turn this off.

Release Toggle on if you want managers or leaders to manually release form responses to employees at a time of their choosing, rather than employees seeing results immediately. This is critical for cycles where managers need to deliver feedback in a 1:1 before results go live. Release is managed from the employee's profile tab.

Email Notifications Configure who gets notified and when. Use thoughtfully — over-notifying causes employees to ignore communications.

Sensitivity levels

Field sensitivity settings override form response visibility. If a field on a form is set to Manager-Only, an employee will not see that field even if they have access to view the form response.

Level	Who can see it
Org Public	The entire organization
Manager-Shared	The employee, anyone they report to, and users with sensitive access
Manager-Only	Only people the employee reports to and users with sensitive access
Personal	Only the employee themselves and users with sensitive access
Highly Sensitive	Completely hidden (including field name) from anyone without sensitive access

Before finalizing any form

Preview the form before launching: click **Preview** in the header, select a real employee to preview as, and verify that all fields, conditional logic, and visibility settings work as expected.

Step 2: Set up automated actions

Automated actions are what make a multi-stage cycle actually work. Without them, you're manually coordinating every handoff — and things get missed.

Navigate to **Admin → Automated Actions** to configure your triggers.

Each action has three parts: a **trigger** (what causes it to fire), a **trigger source** (the specific form or event), and an **action** (what happens as a result).

Common actions to configure:

Self review → Manager review Trigger on Form Submitted from the self-review form, then send the manager review form to the employee's manager. This ensures manager reviews only open after self reviews are complete.

Peer selection → Peer reviews Trigger on Form Submitted from the peer selection form, then send the peer review form to the selected reviewers. Without this action, peer review forms don't go anywhere automatically.

Approval-triggered forms You can configure whether a downstream form fires on submission or on approval of the prior form. For example: the manager review launches only after HR approves the self-review.

Conditional downstream forms If a manager selects "Yes, recommend for promotion" in their review form, a Promotion Justification form is automatically sent to that manager. This uses conditional logic within the form combined with an action trigger.

Reminder automations Set up timed reminders for incomplete submissions at key intervals (e.g., 3 days before deadline). Reduces manual chasing.

Map your entire cycle end-to-end before configuring actions — what triggers what, at what point, and under what conditions. Adding automations retroactively mid-cycle can cause missed sends or double-sends.

Step 3: Configure profile tabs

Profile tabs are required for a performance cycle — they're where managers go to approve and release reviews. Without a configured profile tab, there's nowhere for that to happen.

Navigate to **Admin → Profile Tab Configuration**.

Create a new tab, name it clearly (e.g., "Performance"), set whose profile it appears on, then set who it's displayed to using sensitivity levels. Add your forms as **Form Response History** content — this is the recommended content type for performance reviews, as it displays historical responses over time.

For tabs that mix field data and form response data, use the custom sensitivity filter:

```
target.proxyReviewer=me or target.managers=me or target=me
```

This ensures the employee sees their own data, their managers see it, and anyone filling out a form on their behalf can see it.

Sensitivity guidance by audience:

- Employees should see their own self-review responses and any released manager feedback
- Managers should see self-review responses and be able to complete and release their own review
- HR/Admins should have visibility into all responses
- Use Manager-Only sensitivity for rating fields that should not be visible to the employee prior to release

Admins can also manage approvals and releases in bulk from the form's Responses tab → Sheet View. But the profile tab is the primary interface for managers.

Test your profile tab from the perspective of an employee, a manager, and an admin before launching.

Step 4: Create the review cycle

With forms built, actions configured, and profile tabs ready, create the actual review cycle.

From the left sidebar, select **Performance**, then create a new review. From there:

- Link each form to the appropriate stage of the cycle
- Define which employees the cycle applies to (full org or a specific group)
- Set staggered deadlines for multi-stage cycles — each phase should close before the next opens, with buffer time built in

Reporting relationships during the cycle

Because ChartHop's org chart is live and continuously updated, you need to decide what happens if someone changes managers, transfers, or a manager goes on leave mid-cycle. Two approaches exist: freezing relationships to the org chart at cycle launch, or keeping them live so they reflect real-time changes. A company going through a reorg mid-cycle

almost certainly wants them frozen; a stable org may be fine either way. Check with your ChartHop admin or the in-product documentation for the exact location of this setting.

Pilot before full launch

Scope the cycle to 3–5 trusted employees first. Give them a few days to go through the experience and flag anything off. Use **View As** (click your profile picture in the top right, select an employee) to test visibility from different perspectives — ChartHop renders exactly what that person sees. Test across different roles, levels, and departments. Fix anything in Admin before sending invitations to the full org. Catching a misconfiguration in a pilot of 5 is very different from catching it after it's live for 500.

Step 5: Launch, track, and monitor

Send forms from within the Reviews page. Track completion rates and send reminders from the same place.

In the form's Responses tab, use **Sheet View** to monitor Approval Status and Release Status across all employees. Use **Individual View** for direct admin actions — approve, reject, or release individual form responses.

Step 6: Calibration (Alpha)

Calibration is available as an alpha feature and needs to be enabled before use. Calibration happens after ratings are submitted — it is not a pre-launch step.

Before your calibration sessions:

Map out your sessions in advance — who is being calibrated in each meeting and who the facilitator is. Navigate to the **Calibrations** tab within the review cycle and configure the calibration table, adding or removing columns to show the mix of ChartHop fields and form data most relevant to each session. Only employees who have had a form completed about them will appear.

Apply the appropriate filter for each session (e.g., filter by department), then copy and save the URL. ChartHop encodes filters directly into the URL, so the filtered view is fully preserved in the link. Paste each saved URL into a shared doc or calendar invite — when the session arrives, whoever is running calibration just clicks the link and lands directly in the pre-filtered view, with no fumbling with filters in the room.

Repeat for every scheduled session before any of them begin.

During sessions:

Pull up the pre-saved filtered URL and share your screen. Click the expand icon on any employee's row to drill into their specific form responses. Lock manager review scores before the session begins to prevent changes during calibration. You can approve or release responses directly from this view if you have the appropriate access.

After calibration:

Final ratings surface on employee profiles via the profile tabs configured in Step 3. Export calibration results as needed before closing the cycle.

How performance data connects across ChartHop

Performance data in ChartHop doesn't live in isolation — it connects across the platform:

- **Compensation reviews** — ratings stored as fields can directly inform compensation recommendations in a comp cycle
- **Scenarios** — planning decisions can be informed by performance data alongside headcount and comp
- **Employee profiles** — ratings and review history surface on profile tabs, visible based on sensitivity settings
- **Org chart** — review relationships are driven by the live reporting structure
- **Datasheets** — any rating stored as a field is queryable and filterable across the org

This integration only works if ratings are stored as custom fields. Questions don't flow anywhere.

Common setup mistakes

Mistake	Why it matters
Using questions instead of fields for ratings	Ratings won't be queryable, reportable, or usable in comp reviews
Not configuring profile tabs before launch	Managers can't approve or release reviews
Skipping actions setup	Peer reviews never get sent; downstream forms don't trigger
Not cleaning the org chart first	Reviews go to the wrong managers
Designing visibility after launch	Employees see things they shouldn't — or can't see things they should
Tight timelines with no buffer	Every phase runs late; the cycle collapses
Leaving test forms Active	Employees receive accidental form assignments

12.7.2. Self Reviews

How to Configure a Self Review in ChartHop

What is a Self Review? A Self Review allows employees to evaluate their own performance. The responses are typically shared with their manager.

Before You Start: Key Decisions

Decision 1: Questions vs. Custom Fields

You have two options when building your form:

Option A: Questions Only

- Responses are stored only within the form
- Simpler to set up
- Query or report on responses across the platform using ID's rather than fields

Option B: Questions Connected to Custom Fields

- Responses are stored as custom fields in ChartHop
- Can be queried, filtered, and reported on across the platform
- Best for tracking performance data over time

Need help deciding? Contact your Customer Success Manager to discuss which approach fits your organization's needs.

Decision 2: Who Can See Responses?

For Self Reviews, we recommend **Manager-Shared** access:

- The employee can see their own responses
- The employee's manager can see the responses
- Promotes transparency and enables better performance conversations

Step 1: Build Your Form

Navigate to: People Ops Tools → Forms → Create Form → Self Review

Add a Header (Optional but Recommended)

Add helpful context at the top of your form to guide employees. Examples:

- An image of your rating scale (e.g., 1-5 scale definitions)
- Links to your company values or competency framework
- Brief instructions on how to complete the review

Add Your Questions

Choose the question type that fits what you're asking:

Question Type	Best Used For
Long Text	Open-ended responses, detailed examples
Short Text	Brief answers, single sentences
Single Select	One choice from multiple options
Multi-Select	Multiple choices from a list
Numeric Scale	Rating questions (1-5, 1-10, etc.)
Yes/No	Binary questions
Number Value	Numerical data (goals completed, etc.)
Person Value	Selecting a person from your org
File Attachment	Supporting documents

If Using Custom Fields

For each question connected to a custom field, configure:

- **Applies to:** Select "People"
- **Track changes over time:** Check this box (preserves historical data)
- **Sensitivity:** Select "Manager-Shared"

Step 2: Configure Form Settings

Status

- **Start with:** "Inactive" (draft mode while building)
- **When ready to launch:** "Active"
- **When finished:** "Archived"

Distribution Settings

1. Who is this form about?

- Select: "The person completing the form"

2. Should this form automatically appear on profiles?

Choose based on how you'll manage your review process:

- **Task-Based (Recommended):** Select "Only if there is a pending task"
  - *Use this if you'll create review tasks for employees*
  - *Gives you control over who completes reviews and when*
- **Self-Guided:** Select "Yes, on everyone's profile"
  - *Use this if employees should access reviews anytime*
  - *Reviews are always available without tasks*
- **Custom Group:** Select "Only specific people's profiles (Custom)"
  - *Use this for specific teams or roles*
  - *Requires setting up a custom filter*

Access & Anonymity

1. How should the identity of the respondent be recorded?

- Select: "Identified" (people know who completed the review)

2. Who can see the identity of the respondent?

- Select: "Anyone who can view the form response"

3. Who can view the form responses?

- Select: "Default"

Form Completion

1. Allow saving drafts?

- Select: "Yes" (Recommended)
- *Employees can save progress and return later*

2. Populate form with previous responses?

- Select: "No, start with a blank form every time"
- *Ensures fresh reflection for each review cycle*

3. How would you like your form to display?

- **Pop-up:** Opens in a modal window
- **Standalone page:** Opens in a full page view
- *Choose based on your preference - both work well*

After Submission Settings

Approval

- Decide if managers need to approve self reviews before they're finalized
- This is optional - choose based on your review process

Editing

- **Recommended:** Allow respondent to edit "Until it's approved" OR "For a period of time"
- *Gives employees flexibility to refine their responses*

Export

- Decide if employees can export their review as a PDF
- *Useful if employees want to keep personal copies*

Notifications

Email responses to: (Recommended)

- ☑ The person who completed the form
- ☑ The manager of the person who completed the form

This ensures both parties know when the self review is submitted

Step 3: Create the Profile Tab

Profile tabs display review responses on employee profiles. This makes it easy to view current and historical review data.

Navigate to Profile Tabs

Navigate to **Admin → Profile Content**.

To create a new tab:

1. Click the + icon
2. Name the tab "Performance Reviews"
3. Name the column "Self Review"

To add to an existing tab:

1. Click into the existing tab
2. Add a new column
3. Name the column header "Self Review"

Configure the Self Review Tab

1. Display on the profile of:

- If all employees complete this review: Select "Everyone in the org"
- If only specific employees: Use "Custom" and create a filter

2. Visible to:

- Select: "The person, and the person's managers" (Recommended)
- *Maintains transparency between employee and manager*

3. Columns:

- Under "Form Responses History," select your Self Review form

- *This pulls in the responses from your form*

Step 4: Activate Everything

Activate the Form

1. Set Status to "Active"
2. Test the form yourself before rolling out

Activate the Profile Tab

1. Scroll to the top of the Profile Tab settings
2. Toggle the profile tab to "Active"

Testing Your Self Review

Before launching to your organization:

1. **Complete the form yourself** - Check that all questions appear correctly
2. **Check the profile tab** - Verify responses display as expected
3. **Test notifications** - Confirm emails are sent properly
4. **Review with a colleague** - Get a second set of eyes on the setup

Common Questions

Can I edit the form after it's active? Yes, but be careful. Changes will affect any in-progress reviews. If reviews are underway, consider creating a new version for the next cycle.

What if I want different questions for different teams? You have two options depending on your needs:

Option 1: Completely different question sets - Create separate Self Review forms for each team and use the "Custom" distribution option to target specific groups.

Option 2: Mostly similar questions with a few differences - Use conditional questions within a single form. Select "Conditional" on any question that should only appear for certain people, then add a filter to specify who should see it.

Can employees see past self reviews? Yes, if you've set up the Profile Tab. All historical responses will appear on their profile (visible to them and their managers).

What happens if someone's manager changes mid-review? The new manager will automatically have access to the review responses based on the current reporting structure.

12.7.3. Manager Reviews

How to Configure a Manager Review (Downward Review) in ChartHop

What is a Manager Review? A Manager Review (also called a Downward Review) is a performance evaluation that managers complete about their direct reports. This is typically the primary review document used in performance conversations.

Before You Start: Key Decisions

Decision 1: Questions vs. Custom Fields

You have two options when building your form:

Option A: Questions Only

- Responses are stored only within the form
- Simpler to set up
- Query or report on responses across the platform using ID's rather than fields

Option B: Questions Connected to Custom Fields

- Responses are stored as custom fields in ChartHop
- Can be queried, filtered, and reported on across the platform
- Best for tracking performance data over time
- Can be referenced in smart calculations

Need help deciding? Contact your Customer Success Manager to discuss which approach fits your organization's needs.

Decision 2: When Should Employees See Their Reviews?

This is a critical decision for Manager Reviews:

Option A: Release Step (Controlled Timing)

- Managers write reviews, then manually release them to employees when ready

- Best for coordinating review conversations across the organization
- Ensures reviews are discussed in 1:1s before employees see written feedback
- **Field Sensitivity Setting:** Manager-Shared

Option B: Bulk Releasing Unreleased Reviews (Controlled Timing)

- Admins can release all pending reviews at the end of the review cycle or release all reviews at once
- **Field Sensitivity Setting:** Manager-Shared

Option C: Bulk Release (not using Release functionality)

- All reviews are released to employees at the same time (typically after all are completed)
- Best for structured review cycles with specific release dates
- Requires admin action to release all reviews at once
- Admins must update each field/question in the form from Manager Only sensitivity to Manager Shared
- **Field Sensitivity Setting:** Manager Only

Option D: Immediate Visibility

- Employees see reviews as soon as managers submit them
- Best for continuous feedback cultures
- No release step needed
- **Field Sensitivity Setting:** Manager-Shared

Recommendation: Most organizations use the Release Step approach for better coordination and to ensure managers discuss feedback before employees read it.

Step 1: Build Your Manager Review Form

Navigate To

People Ops Tools → Forms → Create Form → Manager Review

Add a Header (Optional but Recommended)

Provide guidance to managers, such as:

- Your rating scale definitions and examples
- Links to your company values or competency framework
- Tips for writing effective, actionable feedback
- Calibration guidelines
- Reminder to focus on specific examples and behaviors

Add Your Questions

Choose question types that capture the evaluation dimensions you need:

Question Type	Best Used For
Long Text	Detailed feedback, accomplishments, development areas
Short Text	Brief summaries or comments
Single Select	Overall performance ratings, promotion readiness
Multi-Select	Skills demonstrated, competencies met
Numeric Scale	Performance ratings by category (1-5, 1-10, etc.)
Yes/No	Binary assessments (meets expectations, promotion ready)
Number Value	Quantitative goals (% attainment, numeric ratings)

Common Manager Review Questions:

- Overall performance rating
- Key accomplishments this period
- Areas for development
- Goals for next period
- Promotion readiness
- Flight risk assessment

If Using Custom Fields

For questions connected to custom fields:

- **Applies to:** Select "People"
- **Track changes over time:** Check this box (maintains historical performance data)
- **Sensitivity:** Choose based on your release approach:
  - **Manager-Shared:** If using Release Step (managers release individually)
  - **Manager Only:** If using Bulk Release (admin releases all at once)

Step 2: Configure Form Settings

Status

- **Start with:** "Inactive" (draft mode while building)
- **When ready to launch:** "Active"

Distribution Settings

1. Who is this form about?

- Select: "Another Person"
- *Managers are reviewing their direct reports, not themselves*

2. Who can complete this form?

- Select: "Their Manager"
- *Only the direct manager can complete reviews for their reports*

3. Should this form automatically appear on profiles?

Choose based on your review process:

- **Task-Based (Recommended):** "Only if there is a pending task"
  - *Gives you control over when reviews happen and who participates*
  - *You create review tasks for managers*
- **Self-Guided:** "Yes, on everyone's profile"
  - *Managers can write reviews anytime without tasks*
  - *Best for continuous feedback approaches*

- **Custom Group:** "Only specific people's profiles (Custom)"
    - *For specific teams or levels only*

Access & Anonymity

1. How should the identity of the respondent be recorded?

- Select: "Identified"
- *Employees should know their manager wrote the review*

2. Who can see the identity of the respondent?

- Select: "Anyone who can view the form response"

3. Who can view the form responses?

- Select: "The person the form is about"
- *This ensures the employee being reviewed can see their review (once released, if using Release)*

Form Completion

1. Allow saving drafts?

- Select: "Yes" (Recommended)
- *Managers can save progress and return to complete reviews later*

2. Populate form with previous responses?

- Select: "No, start with a blank form every time"
- *Ensures fresh evaluation each review cycle*

3. How would you like your form to display?

- Choose: Pop-up or Standalone page (based on preference)

After Submission Settings

Approval

- Optional: Require approval based on your process
- *Some organizations require skip-level approval or HR review before release*

- *Common for promotions or performance improvement situations*

Release (Optional but Recommended)

If you want managers to control when employees see their reviews:

- Enable: "Require release before the person can view"
- **Who can release:** Select "Submitter or Admins" (Recommended)
  - *Submitter = the manager who wrote the review*
  - *Admins = HR or system administrators*
- *This ensures reviews are discussed in 1:1 meetings before employees read them*

If you're using Bulk Release instead: Skip enabling individual release and plan to release all reviews at once using admin controls.

Editing

- Select: Allow respondent to edit "Until it's approved" OR "For a period of time" (Recommended)
- *Gives managers flexibility to refine reviews before finalizing*
- *Consider timing: "Until approved" or set a specific deadline*

Export

- Optional: Allow export as PDF based on preference
- *Useful if managers want to keep copies or share offline*

Notifications

Email responses to:

Choose who should be notified when reviews are submitted:

- "The person who completed the form" (the manager)
- "The manager of the person the form is about" (skip-level manager)

Recommendation: Enable notification to the manager who completed the form so they have confirmation of submission.

Note: Employees are typically notified separately when reviews are *released*, not when they're submitted.

Step 3: Create the Profile Tab

Profile tabs display manager review responses on employee profiles.

Navigate to Profile Tabs

Navigate to **Admin → Profile Content**.

To create a new tab:

1. Click the + icon
2. Name the tab "Performance Reviews"
3. Name the column "Manager Review"

To add to an existing tab:

1. Click into the existing tab
2. Add a new column
3. Name the column header "Manager Review"

Configure the Downward Review Tab

1. Display on the profile of:

- If all employees receive manager reviews: Select "Everyone in the org" (Recommended)
- If only specific employees: Use "Custom" and create a filter

2. Visible to:

This is where you control visibility timing:

During the Review Period (Before Release):

- Select: "The person's manager" (Recommended)
- *Only managers see in-progress and completed reviews*
- *Employees cannot see reviews until they're released*

After the Review Period (Post-Release):

- Select: "The person, and the person's managers" (Recommended)

- *Employees can now see their reviews*
- *Managers retain access*

Pro Tip: You can adjust this setting at different points in your review cycle. Start with "Manager only" during writing, then change to "Person and managers" after all reviews are released.

3. Columns:

- Under "Form Responses History," select your Manager Review form
- *This displays review responses on the profile*

Step 4: Activate Everything

Activate the Form

1. Set Status to "Active"
2. Test by completing a sample review yourself

Activate the Profile Tab

1. Scroll to top of Profile Tab settings
2. Toggle to "Active"

How the Manager Review Process Works

Here's the typical flow once the form is active:

With Release Step:

1. **Create review tasks** for managers (or managers access reviews on profiles if self-guided)
2. **Managers complete** reviews and submit them
3. **Managers conduct** 1:1 performance conversations with employees
4. **Managers release** reviews during or after the conversation
5. **Employees can view** their written reviews on their profile
6. **Profile tab visibility** can be updated to show employees their reviews

With Bulk Release (by Updating Field Sensitivity):

1. **Create review tasks** for managers
2. **Managers complete** reviews and submit them (employees cannot see yet)
3. **All reviews are completed** and calibrated
4. **Admin releases all reviews** at a designated time
5. **Employees can view** their reviews simultaneously
6. **Managers conduct** 1:1 conversations (typically scheduled around release)

Without Release (Immediate Visibility):

1. **Create review tasks** for managers
2. **Managers complete** reviews
3. **Employees see reviews** immediately upon submission
4. **Managers follow up** with 1:1 conversations

Testing Your Manager Review Setup

Before launching organization-wide:

1. **Complete a test review** - Have a manager write a sample review
2. **Check visibility** - Verify the employee cannot see it yet (if using Release)
3. **Test the release function** - Release the review and confirm visibility changes
4. **Check the profile tab** - Verify the review appears correctly
5. **Test notifications** - Ensure emails go to the right people
6. **Review with HR** - Get sign-off on settings before rolling out
7. **Test approval workflow** - If using approval, verify it works as intended

Common Questions

What's the difference between Release and Bulk Release?

- **Release Step:** Managers individually release each review when they're ready (usually after the 1:1 conversation)

- **Bulk Release:** An admin releases ALL reviews at the same time organization-wide by updating field sensitivity
- Choose based on whether you want individual flexibility or coordinated timing

Should I require approval for manager reviews? Most organizations don't require approval for standard reviews, but consider approval for:

- Promotion recommendations
- Performance improvement plans
- Reviews by new managers
- Organizations wanting HR oversight

Can managers edit reviews after submission? Yes, if you enable the editing setting. Common options:

- Allow editing "Until it's approved" (if using approval)
- Allow editing "For a period of time" (set a deadline)
- No editing after submission (for strict review processes)

What if a manager doesn't complete a review on time? You can:

- Send reminder emails through the task system
- Monitor completion rates in reporting
- Have HR or admins follow up directly

Can skip-level managers see reviews? Yes, managers up the reporting chain can see reviews based on your access settings. The "Default" access setting typically allows the full management chain to view.

When should I change the profile tab visibility from "Manager only" to "Person and managers"?

- **If using individual Release:** Keep it "Manager only" during review writing, then change after most reviews are released
- **If using Bulk Release:** Change it right after you execute the bulk release
- **If not using Release:** Set it to "Person and managers" from the start

How do employees know when their review is released? ChartHop sends an automatic notification email when a review is released to them. You can also communicate the

release timing in advance should you be using fields to toggle.

Can I disable email notifications when releasing reviews? You can only disable notifications when bulk releasing.

What if I want an employee's previous manager to complete the manager review form? As long as the task is still pending, you can reassign a task. Go to the Task tab within the Performance Review and select the pending task you would like to reassign and click Reassign.

12.7.4. Peer Reviews

How to Configure a Peer Review in ChartHop

What is a Peer Review? A Peer Review allows employees to receive feedback from their colleagues. This provides managers with additional perspectives on an employee's performance and collaboration skills.

Before You Start: Key Decisions

Decision 1: Questions vs. Custom Fields

You have two options when building your form:

Option A: Questions Only

- Responses are stored only within the form
- Simpler to set up
- Query or report on responses across the platform using ID's rather than fields

Option B: Questions Connected to Custom Fields

- Responses are stored as custom fields in ChartHop
- Can be queried, filtered, and reported on across the platform
- Best for tracking performance data over time

Need help deciding? Contact your Customer Success Manager to discuss which approach fits your organization's needs.

Decision 2: Who Can See Responses?

For Peer Reviews, we recommend **Manager Only** access:

- Only the manager of the person being reviewed can see responses
- Protects peer anonymity and encourages honest feedback
- The employee being reviewed does NOT see individual peer responses

Note: If you plan to release peer feedback to employees later, you can use **Manager-Shared** access, but this requires careful communication about when feedback becomes visible.

Decision 3: Anonymous or Identified Peer Feedback?

Identified: Managers can see who provided each piece of feedback

- Best for building accountability
- Useful for follow-up conversations

De-identified: Managers see feedback but not who provided it

- Encourages more honest, direct feedback
- Protects peers from potential concerns about candid responses

Important: Peer Reviews Require TWO Forms

Unlike other review types, Peer Reviews need two separate forms:

1. **Peer Selection Form** - Employees select which colleagues will review them
2. **Peer Review Form** - Selected peers complete feedback about the employee

You'll set up both forms in the steps below.

Step 1: Build Your Peer Selection Form

This form allows employees to nominate peers who will provide feedback about them.

Navigate To

People Ops Tools → Forms → Create Form → Peer Selection

Add a Header (Optional but Recommended)

Provide guidance to employees, such as:

- How many peers to select
- Criteria for selecting peers (cross-functional colleagues, frequent collaborators, etc.)
- Deadline for submitting selections

Add Your Question

Question Type: Use "Person Value" field

- This allows employees to select individuals from your organization
- You can set a minimum and maximum number of peers to select

Example Question: "Select 3-5 colleagues who can provide meaningful feedback on your work this year."

You must convert the "Peer Reviewer" question into a field

- **Applies to:** Select "People"
- **Track changes over time:** Check this box
- **Sensitivity:** Select "Manager-Shared" (so managers can see who was selected)

Step 2: Configure Peer Selection Form Settings

Status

- **Start with:** "Inactive" (draft mode while building)
- **When ready to launch:** "Active"

Distribution Settings

1. Who is this form about?

- Select: "The person completing the form"
- *Employees are selecting peers to review themselves*

2. Should this form automatically appear on profiles?

Choose based on your review process:

- **Task-Based (Recommended):** "Only if there is a pending task"
- **Self-Guided:** "Yes, on everyone's profile"
- **Custom Group:** "Only specific people's profiles (Custom)"

Access & Anonymity

1. How should the identity of the respondent be recorded?

- Select: "Identified"

2. Who can see the identity of the respondent?

- Select: "Anyone who can view the form response"

3. Who can view the form responses?

- Select: "Default"

Form Completion

1. Allow saving drafts?

- Select: "Yes" (Recommended)

2. Populate form with previous responses?

- Select: "No, start with a blank form every time"

3. How would you like your form to display?

- Choose: Pop-up or Standalone page (based on preference)

After Submission Settings

Approval

- Select: "Yes" (Recommended)
- *Allows managers to review and approve peer selections before feedback requests go out*

Editing

- Select: "Yes" (Recommended)
- *Employees can adjust their peer selections if needed*

Export

- Optional: Allow export as PDF based on preference

Notifications

Email responses to:

- Recommended: "The manager of the person the form is about" or "None"
- *Typically, you'll notify managers through the approval workflow rather than automatic emails*

Step 3: Build Your Peer Review Form

This is the actual feedback form that selected peers will complete.

Navigate To

People Ops Tools → Forms → Create Form → Peer Review

Add a Header (Optional but Recommended)

Guide peer reviewers with context like:

- Your rating scale definitions
- Company values or competencies being evaluated
- Tips for providing constructive feedback
- Reminder about confidentiality

Add Your Questions

Choose question types that fit the feedback you want:

Question Type	Best Used For
Long Text	Open-ended feedback, examples, suggestions
Short Text	Brief comments
Single Select	One choice (e.g., rating levels)
Multi-Select	Multiple skills or behaviors
Numeric Scale	Performance ratings (1-5, 1-10, etc.)
Yes/No	Binary questions

If Using Custom Fields

For questions connected to custom fields:

- **Applies to:** Select "People"
- **Track changes over time:** Check this box
- **Sensitivity:** Choose based on your release plan:
  - **Manager Only:** If feedback stays with managers only (Recommended)
  - **Manager-Shared:** If you'll release feedback to employees later

Step 4: Configure Peer Review Form Settings

Status

- **Start with:** "Inactive" (draft mode)
- **When ready:** "Active"

Distribution Settings

1. Who is this form about?

- Select: "Another person"
- *Peers are reviewing someone else, not themselves*

2. Who can complete this form?

- Select: "Selected peers"
- **Input the field name** from your Peer Selection Form where employees chose their reviewers
- *Example: If your field is called "Peer Reviewers," enter that exact name here*

3. Should this form automatically appear on profiles?

- Choose based on your review process:
  - **Task-Based (Recommended):** "Only if there is a pending task"
  - **Self-Guided:** "Yes, on everyone's profile"

Access & Anonymity

1. How should the identity of the respondent be recorded?

Choose your anonymity approach:

- **"Identified"** - Managers can see who provided each response
- **"De-identified"** - Managers see responses but not who wrote them

2. Who can see the identity of the respondent?

- Select: "Manager's in the person's reporting line"
- *This ensures only relevant managers see peer identities (if identified)*

3. Who can view the form responses?

- Select: "Managers of the person the form is about"
- *Keeps peer feedback visible only to the reviewee's manager*

Form Completion

1. Allow saving drafts?

- Select: "Yes" (Recommended)

2. Populate form with previous responses?

- Select: "No, start with a blank form every time"

3. How would you like your form to display?

- Choose: Pop-up or Standalone page

After Submission Settings

Approval

- Select: "No" (Recommended)
- *Peer reviews typically don't need approval - they go directly to managers*

Release

- We do NOT recommend using a release step for Peer Reviews
- *Release is typically used for manager reviews, not peer feedback*

Editing

- Select: "No" (Recommended)
- *Once submitted, peer feedback should remain unchanged*

Export

- Optional: Allow export as PDF based on preference

Notifications

Email responses to:

- Recommended: "The manager of the person the form is about" or "None"
- *Decide if managers should be notified each time a peer submits feedback*

Step 5: Create the Profile Tab

Profile tabs display peer review responses on employee profiles.

Navigate to Profile Tabs

Navigate to **Admin → Profile Content**.

To create a new tab:

1. Click the + icon
2. Name the tab "Performance Reviews"
3. Name the column "Peer Review"

To add to an existing tab:

1. Click into the existing tab
2. Add a new column
3. Name the column header "Peer Review"

Configure the Peer Review Tab

1. Display on the profile of:

- If all employees receive peer reviews: Select "Everyone in the org"

- If only specific employees: Use "Custom" and create a filter

2. Visible to:

- Select: "The person's manager" (Recommended)
- *Keeps peer feedback confidential to managers only*

3. Columns:

- Under "Form Responses History," select your Peer Review form
- *This displays peer feedback responses on the profile*

Step 6: Activate Everything

Activate the Peer Selection Form

1. Set Status to "Active"
2. Test by selecting peers yourself

Activate the Peer Review Form

1. Set Status to "Active"
2. Test by completing a peer review

Activate the Profile Tab

1. Scroll to top of Profile Tab settings
2. Toggle to "Active"

How the Peer Review Process Works

Here's the typical flow once both forms are active:

1. **Employees select their peers** using the Peer Selection Form
2. **Managers approve** the peer selections (if approval is enabled)
3. **ChartHop creates tasks** for the selected peers
4. **Peers complete** the Peer Review Form about their colleague
5. **Managers view** peer feedback on the employee's profile

6. **Managers incorporate** peer feedback into performance discussions

Testing Your Peer Review Setup

Before launching organization-wide:

1. **Complete the peer selection process** - Have a test employee select peers
2. **Approve the selections** - Test the manager approval workflow
3. **Complete a peer review** - Verify the selected peer receives and can complete the form
4. **Check the profile tab** - Confirm feedback appears correctly on the profile
5. **Test anonymity settings** - Verify identified vs. de-identified works as intended
6. **Review notifications** - Ensure emails go to the right people

Common Questions

How many peers should employees select? This is up to you! Common ranges are 3-5 peers. You can set minimum and maximum limits in the Person Value field.

Can I select peers on behalf of employees? Yes, managers can complete the Peer Selection Form on behalf of their direct reports if needed.

What if someone selects a peer who doesn't complete the review? You can send reminders through the task system or manually follow up. Incomplete peer reviews won't block the overall review process.

Should peer reviews be anonymous? Most organizations use "Identified" for accountability, but "De-identified" can encourage more candid feedback. Discuss with your CSM about what works best for your culture.

Can employees see their own peer review feedback? Not by default with our recommended settings. Managers typically summarize peer feedback during performance conversations. If you want employees to see raw peer feedback, you'll need to adjust visibility settings or use a release step.

What's the difference between Manager Only and Manager-Shared sensitivity?

- **Manager Only:** Only managers see the feedback (recommended for most peer reviews)

- **Manager-Shared:** Both manager and employee can see feedback (use if you plan to share peer feedback with employees)

Do I need to use the Release feature? No, we don't recommend using Release for peer reviews. It's typically used for manager-written reviews that need to be shared with employees at a specific time.

12.7.5. Upward Reviews

How to Configure an Upward Review in ChartHop

What is an Upward Review? An Upward Review (also called Manager Feedback or 360 Feedback from Direct Reports) allows employees to provide feedback about their manager. This helps managers understand how they're perceived by their team and identify areas for leadership development.

Before You Start: Key Decisions

Decision 1: Questions vs. Custom Fields

You have two options when building your form:

Option A: Questions Only

- Responses are stored only within the form
- Simpler to set up
- Cannot query or report on responses across the platform

Option B: Questions Connected to Custom Fields

- Responses are stored as custom fields in ChartHop
- Can be queried, filtered, and reported on across the platform
- Best for tracking leadership effectiveness over time

Need help deciding? Contact your Customer Success Manager to discuss which approach fits your organization's needs.

Decision 2: Who Can See the Feedback?

For Upward Reviews, we recommend **Manager Only** access:

- Only the manager being reviewed sees the feedback from their direct reports
- The manager's skip-level (their manager) may also see responses

- Direct reports do NOT see each other's feedback or aggregated results
- This protects employee anonymity and encourages honest feedback

Important: Upward reviews are sensitive. Most organizations keep this feedback visible only to the manager receiving it and potentially their skip-level manager for coaching purposes.

Decision 3: Anonymous or Identified Feedback?

Identified (Recommended): Skip-level managers can see who provided feedback, but the manager being reviewed typically cannot

- Allows for accountability in feedback quality
- Useful for skip-level managers coaching the manager
- The manager receiving feedback sees responses but not necessarily who wrote them

Note: ChartHop allows you to control who sees the identity separately from who sees the responses, giving you flexibility in how you handle anonymity.

Step 1: Build Your Upward Review Form

Navigate To

People Ops Tools → Forms → Create Form → Upward Review

Add a Header (Optional but Recommended)

Provide guidance to employees giving feedback to their manager:

- Your rating scale definitions
- Links to leadership competencies or values
- Tips for providing constructive, actionable feedback
- Reminder about the confidentiality of their responses
- Encouragement to be honest and specific

Add Your Questions

Choose question types that capture leadership effectiveness:

Question Type	Best Used For
Long Text	Open-ended feedback, specific examples, suggestions
Short Text	Brief comments
Single Select	Leadership effectiveness ratings
Multi-Select	Leadership behaviors demonstrated
Numeric Scale	Rating on leadership dimensions (1-5, 1-10)
Yes/No	Binary leadership questions

Common Upward Review Questions:

- How effectively does your manager communicate expectations?
- Does your manager provide regular feedback and coaching?
- How well does your manager support your professional development?
- Does your manager foster an inclusive team environment?
- What should your manager start doing, stop doing, or continue doing?
- Overall effectiveness rating
- Leadership strengths and development areas

If Using Custom Fields

For questions connected to custom fields:

- **Applies to:** Select "People"
- **Track changes over time:** Check this box (tracks leadership effectiveness over time)
- **Sensitivity:** Select "Manager Only" (Recommended)
    - *Keeps feedback confidential to the manager and their leadership chain*

Step 2: Configure Form Settings

Status

- **Start with:** "Inactive" (draft mode while building)
- **When ready to launch:** "Active"
- **When finished:** "Archived"

Distribution Settings

1. Who is this form about?

- Select: "Another Person"
- *Direct reports are reviewing their manager, not themselves*

2. Who can complete this form?

- Select: "Their Direct Reports"
- *Only people who report directly to the manager can complete the review*

3. Should this form automatically appear on profiles?

Choose based on your review process:

- **Task-Based (Recommended):** "Only if there is a pending task"
  - *Gives you control over when upward reviews happen*
  - *You create tasks for direct reports to review their managers*
- **Self-Guided:** "Yes, on everyone's profile"
  - *Direct reports can provide feedback to their manager anytime*
  - *Best for continuous feedback cultures*
- **Custom Group:** "Only specific people's profiles (Custom)"
  - *For specific managers or levels only*
  - *Example: Only managers with 3+ direct reports*

Access & Anonymity

1. How should the identity of the respondent be recorded?

- Select: "Identified"
- *The system records who provided feedback, but you control who can see that identity*

2. Who can see the identity of the respondent?

- Select: "Manager's in the person's reporting line"
- *Skip-level managers can see who provided feedback (for coaching purposes)*
- *The manager being reviewed typically cannot see individual identities*
- *This protects direct reports while maintaining some accountability*

3. Who can view the form responses?

- Select: "Managers of the person the form is about"
- *The manager being reviewed sees the feedback content*
- *Their skip-level manager can also see feedback to support coaching*

Form Completion

1. Allow saving drafts?

- Select: "Yes" (Recommended)
- *Direct reports can save progress and return later*

2. Populate form with previous responses?

- Select: "No, start with a blank form every time"
- *Ensures fresh feedback each review cycle*

3. How would you like your form to display?

- Choose: Pop-up or Standalone page (based on preference)

After Submission Settings

Approval

- Select: "No" (Recommended)
- *We don't recommend requiring approval for upward reviews*
- *Approval could compromise the confidentiality of feedback*

Release

- Select: "No" (Recommended)
- *We don't recommend using a release step for upward reviews*

- *Release is typically used for downward reviews, not upward feedback*
- *Feedback should be available to the manager once submitted*

Editing

- Select: "No" (Recommended)
- *Once submitted, upward feedback should remain unchanged*
- *This maintains integrity of the feedback process*
- *Prevents second-guessing or pressure to change responses*

Export

- Optional: Allow export as PDF based on preference
- *Managers may want to save their feedback for personal development*

Notifications

Email responses to:

Choose based on your preference:

- **Option 1:** "The manager of the person the form is about" (the skip-level manager)
  - *Useful if skip-level managers are coaching managers through feedback*
- **Option 2:** "None" (Recommended for many organizations)
  - *Reduces notification fatigue*
  - *Managers can check their profile tab to see feedback*

Note: We typically don't notify the manager being reviewed for each individual submission (to maintain some anonymity during the collection period). Managers can view aggregated feedback on their profile once all responses are in.

Step 3: Create the Profile Tab

Profile tabs display upward review feedback on manager profiles.

Navigate to Profile Tabs

Navigate to **Admin → Profile Content**.

To create a new tab:

1. Click the + icon
2. Name the tab "Performance Reviews"
3. Name the column "Upward Review"

To add to an existing tab:

1. Click into the existing tab
2. Add a new column
3. Name the column header "Upward Review"

Configure the Upward Review Tab

1. Display on the profile of:

Upward reviews only apply to people who have direct reports, so use a filter:

- Select: "Custom"
- **Filter:** "Directs >= 1" (Recommended)
- *This displays the tab only on profiles of people who manage at least one person*

Why this matters: Individual contributors don't need an Upward Review tab since they don't have direct reports providing feedback.

2. Visible to:

- Select: "The person's manager" (Recommended)
- *The manager being reviewed sees their own feedback*
- *Their skip-level manager can also see it (for coaching)*
- *Direct reports cannot see aggregated results or others' feedback*

Alternative: Some organizations choose "The person, and the person's managers" if they want managers to access their own feedback, but this is implicit in most access settings.

3. Columns:

- Under "Form Responses History," select your Upward Review form
- *This displays upward feedback on the manager's profile*

Step 4: Activate Everything

Activate the Form

1. Set Status to "Active"
2. Test by having a direct report complete a review

Activate the Profile Tab

1. Scroll to top of Profile Tab settings
2. Toggle to "Active"

How the Upward Review Process Works

Here's the typical flow once the form is active:

1. **Create review tasks** for direct reports (or enable self-guided access)
2. **Direct reports complete** upward reviews about their manager
3. **Feedback is submitted** and appears on the manager's profile
4. **Manager reviews** their aggregated feedback
5. **Skip-level manager** (optional) reviews feedback to coach the manager
6. **Manager creates** a development plan based on feedback
7. **Manager follows up** with team (optional) on actions they'll take

Best Practice: Consider holding a team discussion where managers share key themes from their upward feedback and commitments to improvement (without revealing individual responses).

Testing Your Upward Review Setup

Before launching organization-wide:

1. **Complete a test review** - Have a direct report write sample feedback
2. **Check visibility** - Verify the manager sees feedback but not necessarily individual identities
3. **Check the profile tab** - Confirm feedback appears on the manager's profile

4. **Verify filtering** - Ensure the profile tab only appears for people with direct reports
5. **Test notifications** - Verify emails go to the right people (if enabled)
6. **Review anonymity settings** - Confirm identity protections work as intended
7. **Check skip-level access** - Verify skip-level managers can see feedback if intended

Common Questions

How many direct reports should participate for meaningful feedback? Most organizations require at least 3-4 direct reports for upward reviews to protect anonymity. With fewer respondents, individual feedback can be too easily identified. Consider setting a minimum threshold for participation.

Can managers see who wrote each piece of feedback? By default with our recommended settings, no. The manager sees the feedback content but not who wrote it. Skip-level managers (the manager's manager) can see identities for coaching purposes, but this can be adjusted based on your needs.

Should upward reviews be anonymous? Most organizations use "Identified" in the system for accountability, but control visibility so the manager being reviewed doesn't see individual identities. This balances honest feedback with quality control.

When should upward reviews happen? Common timing:

- As part of annual or bi-annual performance review cycles
- After a manager has been in role for 90-180 days
- Regularly (quarterly/semi-annually) for leadership development
- After major team changes or reorganizations

What if a manager only has 1-2 direct reports? Consider whether upward reviews are appropriate for this situation, as feedback can be too easily identified. Alternatives:

- Skip the formal upward review for small teams
- Combine feedback from multiple review periods to aggregate more responses
- Focus on 1:1 conversations instead of formal reviews

Should managers share upward review results with their team? This is a cultural decision. Some organizations encourage managers to:

- Share high-level themes (not individual comments)
- Discuss actions they'll take based on feedback
- Thank the team for honest input

This transparency can build trust, but it's not required.

Can a manager's skip-level boss see the upward feedback? Yes, with our recommended settings. Skip-level managers can see upward feedback to help coach the manager through development areas. If you prefer to keep feedback private to the manager only, you can adjust the visibility settings.

What if someone writes inappropriate feedback? This is rare, but if it happens:

- HR should review the feedback
- Address the issue directly with the respondent
- Consider whether the feedback should be removed
- Reiterate guidelines for constructive feedback in future cycles

Best Practices for Upward Reviews

Communication is Key:

- Explain the purpose and confidentiality measures to employees before launch
- Set expectations about how feedback will be used (development, not punishment)
- Provide guidelines for constructive feedback
- Reassure employees about anonymity protections

Minimum Participation:

- Consider requiring at least 3-4 respondents before sharing results
- Aggregate feedback to protect individual identities
- Skip upward reviews for managers with very small teams

Follow-Through:

- Managers should create action plans based on feedback
- Skip-level managers should coach managers through development
- Follow up in future cycles to show progress

Frequency:

- Start with annual or bi-annual cycles
- Consider more frequent feedback as your culture matures
- Balance thoroughness with survey fatigue

Setting Up Automated Actions

Automating Manager Reviews After Self-Review Completion

To automatically trigger the Manager Review when an employee submits their Self Review, configure an automated action with the following settings:

Event Type: Form Submitted

Configuration Steps:

1. Navigate to Automated Actions
2. Create a new action
3. Select "Form Submitted" as the triggering event
4. Specify the Self Review form as the trigger source
5. Set the Manager Review form as the automated action to send

Result: When an employee completes and submits their Self Review, the system will automatically send the corresponding Manager Review without manual intervention.

Use Case: This automation streamlines the performance review workflow by eliminating delays between review stages and ensuring managers receive review requests promptly after employee submissions.

Automating Peer Reviews After Selection

To automatically trigger the Peer Review when an employee submits their Peer Selection, configure an automated action with the following settings:

Event Type: Form Submitted

Configuration Steps:

1. Navigate to Automated Actions
2. Create a new action
3. Select "Form Submitted" as the triggering event

4. Specify the Peer Selection form as the trigger source
5. Set the Peer Review form as the automated action to send
6. Set the Send Form To field to the Peer Reviewer field

Result: When the Peer Selection form is submitted, the system will automatically send the Peer Review form to selected peers without manual intervention.

12.7.7. Profile Tabs

How to Configure Profile Tabs in ChartHop

Profile tabs allow you to create custom views on employee profiles to display important information like performance reviews, compensation history, or any other data you want to track. This guide walks through the complete setup process.

Getting Started

Navigate to **Admin > Profile Tab Configuration** to begin creating your custom profile tab.

Step 1: Create Your Tab

Click to create a new tab and give it a meaningful name like "Performance" or whatever best describes the information you'll be displaying. This name will appear as a tab on employee profiles.

Step 2: Add Columns

Add the columns you want to display in your tab. These will organize the information shown to users viewing the profile.

Step 3: Configure Sensitivity Settings

Sensitivity settings control who can view this profile tab. Our recommended starting point is to allow the person and their managers to view the tab, but you can customize this based on your organization's needs.

Standard Sensitivity Settings

For most use cases, you can use the built-in sensitivity options to control access by role or relationship to the employee.

Custom Sensitivity for Forms with Share Settings

If you're displaying forms that have their own share settings, you'll need to use the custom sensitivity dropdown with the following filter:

```
target.proxyReviewer=me or target.managers=me or target=me
```

This filter ensures that:

- The employee can view their own information (target=me)
- The employee's managers can view it (target.managers=me)
- Anyone filling out a form on behalf of the employee can view it (target.proxyReviewer=me)

You can adjust these permissions at any time as your needs change.

Step 4: Choose Your Content Type

Profile tabs can display three types of content:

Form Response History (Recommended)

This option displays historical responses from specific forms, making it ideal for tracking performance reviews, feedback, or any recurring form submissions. This is the recommended approach for most use cases.

Field History

Use this option when you want to show changes to specific fields over time rather than complete form submissions. Select the applicable fields you want to track in the field history section.

Static Content with Markdown

You can use markdown formatting to display static information or create custom layouts within your profile tab.

Tips for Success

- Start with high sensitivity settings and refine / broaden them based on feedback and testing from your team

- Use clear, descriptive names for your tabs that make it obvious what information they contain
- Test your configuration by viewing it from different user perspectives (as an employee, as a manager, etc.)
- Remember that you can always come back to **Admin > Profile Tab Configuration** to modify your settings

Performance Review Question Bank

Use these proven questions as a starting point for building your performance review forms in ChartHop. Customize them to align with your company values, competencies, and performance framework.

Self Review Questions

Reflection & Self-Assessment

Open-Ended Questions (Long Text):

- What are your most significant accomplishments this review period? Please provide specific examples.
- What challenges did you face, and how did you address them?
- What are 2-3 areas you'd like to develop or improve?
- What support or resources would help you be more successful in your role?
- What aspects of your role energize you most?
- What aspects of your role do you find challenging or frustrating?
- How have you demonstrated our company values this period? Please provide specific examples.
- Looking ahead 3-5 years, what does career success look like for you?

Rating Questions (Numeric Scale or Single Select):

- Overall, how would you rate your performance this period? (1-5 scale: Does Not Meet Expectations to Exceeds Expectations)
- How effectively did you demonstrate [Company Value]? (1-5 scale for each value)
- Rate your performance in the following areas:
  - Technical Knowledge & Expertise
  - Problem Solving & Critical Thinking
  - Autonomy & Ownership

    - Collaboration & Communication
    - Impact & Results Delivery
    - Leadership & Influence (for senior roles)

Multiple Choice Questions:

- Which company values do you feel you most strongly embodied this period? (Multi-select)
- What type of development would be most valuable to you? (Options: Technical skills, Leadership development, Cross-functional exposure, Mentorship, etc.)

Manager Review (Downward Review) Questions

Performance Evaluation

Open-Ended Questions (Long Text):

- What are this employee's most significant accomplishments this review period? Please provide specific examples.
- What are 2-3 areas where this employee can develop or improve? Be specific and actionable.
- How has this employee grown or developed since the last review period?
- What support, resources, or development opportunities would help this employee be more successful?
- What are this employee's greatest strengths?
- How does this employee demonstrate our company values? Please provide specific examples.
- Is this employee ready for promotion or increased responsibilities? Why or why not?
- What are this employee's career goals, and how can we support their growth?

Rating Questions (Numeric Scale or Single Select):

- Overall, how would you rate this employee's performance? (1-5 scale: Does Not Meet Expectations to Exceeds Expectations)
- Rate this employee's performance in the following areas:
    - Technical Knowledge & Expertise

- Quality of Work & Attention to Detail
- Problem Solving & Critical Thinking
- Autonomy & Ownership
- Collaboration & Communication
- Impact & Results Delivery
- Adaptability & Learning Agility
- Leadership & Influence (for senior roles)
- People Management & Team Development (for managers)

Multiple Choice Questions:

- Which company values does this employee most strongly embody? (Multi-select)
- What is this employee's promotion readiness? (Options: Ready now, Ready within 6 months, Ready within 1 year, Not ready - needs development, Not interested in promotion)
- What is this employee's flight risk? (Options: Low, Medium, High)
- Performance trend: (Options: Improving, Consistent, Declining)

Peer Review Questions

Collaboration & Impact Assessment

Open-Ended Questions (Long Text):

- What are this colleague's greatest strengths? Please provide specific examples.
- What is one area where this colleague could improve or develop further?
- Describe a specific situation where this colleague contributed positively to a project or team goal.
- What should this colleague START doing to be more effective in their role?
- What should this colleague CONTINUE doing to be effective in their role?
- What should this colleague STOP doing to be more effective in their role?
- How does this colleague demonstrate our company values in their daily work?
- What makes this colleague an effective collaborator?

Context Questions (Short Text or Single Select):

- Which projects or initiatives have you collaborated with this colleague on? (Short Text)
- How frequently do you work with this colleague? (Options: Daily, Weekly, Monthly, Occasionally, Rarely)
- In what capacity do you work with this colleague? (Options: On the same team, Cross-functional projects, Company-wide initiatives, Indirectly, etc.)

Rating Questions (Numeric Scale or Single Select):

- How would you rate your collaboration with this colleague? (1-5 scale: Unsuccessful to Highly Successful)
- Rate this colleague's effectiveness in the following areas:
  - Communication & Transparency
  - Collaboration & Teamwork
  - Reliability & Follow-Through
  - Quality of Work
  - Problem Solving & Innovation
  - Responsiveness & Availability
  - Knowledge Sharing & Support

Multiple Choice Questions:

- Which company values does this colleague most strongly demonstrate? (Multi-select)

Peer Selection Questions

For the Peer Selection Form:

- Select 3-5 colleagues who can provide meaningful feedback on your work this review period. (Person Value field with min/max limits)
- Please select peers who: (Add this as guidance text)
  - You've worked closely with this review period
  - Can speak to your contributions and collaboration
  - Represent different perspectives (cross-functional partners, project teammates, etc.)

Upward Review Questions

Manager Effectiveness Assessment

Open-Ended Questions (Long Text):

- What does your manager do particularly well? Please provide specific examples.
- What is one area where your manager could improve or develop further?
- What should your manager START doing to be more effective?
- What should your manager CONTINUE doing as a manager?
- What should your manager STOP doing to be more effective?
- How does your manager support your professional development and career growth?
- How could your manager better support you or the team?
- Please share any additional feedback for your manager.

Rating Questions (Numeric Scale or Single Select):

- Overall, how effective is your manager? (1-5 scale: Not Effective to Very Effective)
- Rate your manager's effectiveness in the following areas:
    - Day-to-Day Operations & Execution
    - Strategic Thinking & Alignment to Company Goals
    - Communication & Transparency
    - Providing Feedback & Coaching
    - Supporting Professional Development
    - Team Building & Morale
    - Decision Making
    - Advocacy & Support for Team Members
    - Creating Psychological Safety
    - Fostering Inclusion & Belonging

Agreement Scale Questions (Yes/No/Sometimes or Strongly Disagree to Strongly Agree):

- My manager communicates clear expectations and goals.

- My manager provides regular, actionable feedback on my performance.
- My manager provides the right level of autonomy and support.
- My manager cares about my wellbeing and career development.
- My manager advocates for me and the team.
- My manager makes fair and thoughtful decisions.
- My manager creates a positive and inclusive team environment.
- My manager creates psychological safety where I feel comfortable sharing ideas and concerns.
- My manager leads by example and demonstrates our company values.
- I would recommend my manager to others.

Goal Setting & Future Planning Questions

For Any Review Type:

- What are your top 3 priorities or goals for the next review period? (Long Text)
- What skills or competencies do you want to develop? (Long Text or Multi-Select)
- What type of projects or responsibilities interest you for future growth? (Long Text)
- What resources or support would help you achieve your goals? (Long Text)

Question Design Best Practices

Writing Effective Questions

Do:

- Ask for specific examples and behaviors
- Use clear, simple language
- Focus on observable actions and outcomes
- Ask open-ended questions that encourage thoughtful responses
- Align questions to your company values and competencies
- Include both strengths and development areas
- Make questions actionable (feedback should lead to growth)

Don't:

- Ask leading questions that suggest a "right" answer
- Use vague or ambiguous language
- Ask questions that can be answered with yes/no when you want details
- Create questions that are too similar to each other
- Ask for opinions on things outside the respondent's knowledge
- Make questions overly complex or multi-part

Balancing Question Types

Long Text Questions:

- Best for: Detailed feedback, examples, suggestions
- Limit to: 3-5 per form to avoid survey fatigue
- Use when: You need qualitative insights and specific examples

Rating Scale Questions:

- Best for: Quantifiable performance metrics, trending over time
- Use consistent scales: (e.g., always use 1-5, not mixing 1-3 and 1-5)
- Provide clear definitions: Label what each number means

Multiple Choice Questions:

- Best for: Categorization, values alignment, standardized options
- Ensure options are: Mutually exclusive and comprehensive
- Use when: You want structured, comparable data

Recommended Form Length

- **Self Review:** 5-8 questions (mix of ratings and open-ended)
- **Manager Review:** 6-10 questions (more detailed assessment)
- **Peer Review:** 4-6 questions (focused on collaboration)
- **Upward Review:** 5-8 questions (focused on leadership effectiveness)

Remember: Quality over quantity. Fewer, well-crafted questions yield better feedback than lengthy forms that create survey fatigue.

Customization Tips

Align to Your Framework

If your organization uses a specific performance framework, map questions to it:

- **Competency-Based:** Create rating questions for each competency
- **OKR-Based:** Ask about goal achievement and outcomes
- **Values-Based:** Include questions about demonstrating each value
- **Level-Based:** Adjust question difficulty based on seniority

Include Your Company Values

Replace generic questions with value-specific ones:

- Generic: "What did this person do well?"
- Value-Specific: "How did this person demonstrate [Innovation/Collaboration/Ownership]?"

Scale Appropriately

Adjust question complexity based on:

- **Entry-Level Roles:** Focus on learning, execution, collaboration
- **Mid-Level Roles:** Add autonomy, problem-solving, influence
- **Senior Roles:** Emphasize strategic thinking, leadership, impact
- **Manager Roles:** Include people development, team effectiveness

Need Help?

Contact your Customer Success Manager for:

- Reviewing your custom questions before launch
- Mapping questions to custom fields
- Creating conditional logic for role-specific questions

- Analyzing response patterns and data quality
- Best practices for your industry or company size

12.7.9. FAQ

Can I change a deadline date after it is set? No. Once a deadline date is set, it cannot be changed. However, if a *soft deadline* was set, users can still submit their form after the deadline date.

Can I customize the approval chain? No, not at this time. Only the person's manager or manager's manager can approve.

When can I generate a link to the form? The option to populate a link in a form only appears when the form is about the person themselves (i.e., self-reporting). If it's something like a downward or manager review, you would need to generate the task for the specific person completing it or go to the employee's profile.

How do conditional questions work? Conditional questions allow you to show or hide questions dynamically. You can create conditions based on:

- **Previous answers** – Show questions based on how someone responded to a different question in the form
- **Profile data** – Show questions based on information about the person the form is about (e.g., their department, role, or hire date), not the person filling out the form

12.8. Engagement Surveys

ChartHop's Engagement module gives you a privacy-first way to collect honest feedback from your team. Whether you're running a company-wide pulse, measuring eNPS, or targeting specific groups with conditional questions, this guide walks you through everything from setup to analysis.

How engagement surveys work

Before you build anything, it helps to understand the two-piece model.

Every engagement survey in ChartHop is made up of a **Form** and a **Survey** (also called an assessment). The Form is where you build your questions and configure privacy settings. The Survey is the cycle — it's what you attach the form to, define your audience and timeline, send tasks from, and use to track participation.

You always build the form first, then create the Survey and attach it.

Questions vs. fields

When building an engagement survey form, you'll add **questions** — not fields. This is an important distinction. Fields are ChartHop data points tied to a person's record (like department or title). Questions are standalone form inputs that capture responses without writing to anyone's profile.

For engagement surveys, always use question types: short text, long text, single select, multiple choice, numeric scale, yes/no. The distinction matters for reporting too — responses to questions are accessed via answerValue['questionId'] in dashboards, not via field codes.

Choosing your privacy level

The privacy level you set on a form controls how responses are stored and who can see what. This decision shapes everything downstream — what demographic reporting is available, whether individual respondents can be identified, and what happens to the data permanently. Choose before you launch, because some changes are irreversible.

Privacy level	Individual responses visible?	Demographic reporting available?
Identified	Yes	Yes, full
De-identified	No	Yes, by configured demographic fields only
Fully Anonymous	No	Only if the respondent provides it in the form

De-identified is the right choice for most engagement surveys. Identity is stored internally but never displayed — what admins and managers see is responses grouped by demographic attributes like department, location, or tenure. This gives you meaningful reporting while protecting employee trust.

Fully anonymous stores no identity at all. Once a response is submitted anonymously, it cannot be attributed to anyone — including by a ChartHop administrator — and this cannot be reversed. Anonymous is the right choice when you want the absolute lowest barrier to honest feedback and don't need demographic breakdowns. If you want to report by group, you'd need to add demographic questions directly to the form.

12.8.1. Running a Survey

Step 1: Before you build — configure de-identified reporting

```
(Step 1 Only Applies to De-Identified Surveys)
```

If you're running a de-identified survey, do this before you create your form. The demographic fields available as reporting dimensions need to be configured in org settings first.

1. Go to **Admin > Configuration > Modules**.
2. Under the **Engagement** section, find **De-identified forms** and add the fields you want to slice results by under **Recorded fields** — for example, Department, Location, Employment Status, Tenure Range, or Gender. Supported field types are single-select, multi-select, and group fields.
3. Set your **Minimum group size**. The default is **5**. Groups below this threshold are rolled up into an "Other" bucket so no individual can be identified from a small group. The hard floor is **3** and this is configurable per org.

One thing worth knowing: demographic data is captured at the moment of submission, not at the start of the survey cycle. If someone's department changes mid-cycle, their response is tied to their department at the time they submitted.

Step 2: Build your form

1. Navigate to **People Ops Tools** and open the **Forms** section.
2. Click **New Form**. Give your form an **internal name** (how it appears to admins and in CQL expressions) and a **display name** (what participants see). Keep the internal name consistent — it's what your dashboard charts will reference, so changing it later will break any charts already built against it.
3. Add your questions in the **Form Builder** tab. Use question types — short text, long text, single select, multiple choice, numeric scale, yes/no.
4. Open the **Settings** tab to configure the following:

Distribution

Who is this form about? Select **No one specifically**. This is the correct setting for engagement surveys — the UI describes it as "For surveys or polls where the response isn't stored on a person's profile." This setting also determines how conditional logic works: because the form isn't about a particular person, you'll use me.fieldcode syntax in question filters rather than unprefixed field references (more on that below).

Who can complete this form? Choose **Anyone in the org** for a standard company-wide engagement survey, or **Custom** if you want to restrict to a specific group.

Access and Anonymity

How should the identity of the respondent be recorded and displayed? Choose one of three options:

- **Identified** — Linked to a person and their demographic information. Use this only when individual attribution is needed and expected by respondents.
- **De-Identified** — Hides identity but allows demographic information and limits reporting. This is the right choice for most engagement surveys.
- **Anonymous** — Not linked to any personally identifiable information. Use when you want zero attribution and no demographic reporting.

Who can view the form responses?

This controls who can access the Form Responses page for this form. Leave this set to **Default** for engagement surveys.

Default means form responses are visible to the user who submitted the form, admins with formResponse:read permission, and anyone the survey has been explicitly shared with. For engagement surveys that use questions rather than fields, this setting is what determines access — so Default keeps results appropriately restricted to admins and whoever the survey is shared with, rather than the broader org.

The other options (The person the form is about, Managers of the person the form is about, etc.) are intended for performance review forms where responses need to be released to the subject or their manager. They aren't applicable to engagement surveys set to "No one specifically."

1. Add any conditional logic (see below if needed).

Adding conditional logic

You can show or hide individual questions and text blocks based on conditions. Every question block supports a CQL filter — if the filter evaluates to true, the block is shown; otherwise it's hidden.

Engagement surveys work differently from other form types like performance reviews, because they aren't "about" a particular person. This changes the syntax for conditions based on the respondent's own attributes.

To write a condition based on who is filling out the form, use:

```
me.<fieldcode>:value
```

For example:

- me.department:Engineering — only show to respondents in Engineering
- me.employment:FULL — only show to full-time employees
- me.is:manager — only show to managers

If you've used conditional logic in performance reviews before, note that unprefixed references like department:Engineering won't work in engagement surveys. The me. prefix is required here. This syntax has been validated by the ChartHop product team.

You can also show or hide a question based on how someone answered an earlier question in the same form. For field-backed questions, use dot notation:

```
answerValue.fieldName:["value"]
```

For non-field yes/no questions (not backed by a ChartHop custom field), use bracket notation with single quotes around the question ID:

```
answerValue['<questionId>']="true"
```

The single quotes inside the brackets are required — without them, the expression won't evaluate correctly.

Step 3: Launch your survey

Once your form is ready, create a **Survey** (assessment) to manage the cycle.

1. Create a new Survey and attach your form to it.
2. Configure your audience — who should receive a task to complete the survey.
3. Set a due date. If you add a hard deadline, be aware that tasks are automatically removed when it passes. The form may still accept responses via direct link after that point, but those responses won't be counted in the Survey's participation tracking. If you need to extend a survey, re-send on a new Survey without a hard deadline.
4. Send tasks to participants. Every participant receives an initial notification when tasks are sent.

Step 4: Track participation and send reminders

To monitor who has completed the survey and send reminders to those who haven't, go to the **Tasks** tab within the Survey. From there you can filter tasks by status to see who still has an open or pending task, and send a reminder to just that group. People who've already submitted won't be included.

One important nuance for anonymous surveys: the Tasks tab shows who was **asked** to complete the form — not who submitted a response. Tasks are assigned to people before they respond, so names are visible in the task list regardless of the anonymity setting. This doesn't compromise response anonymity, but it does mean an admin can see that a specific person has or hasn't completed their task. If your org needs stricter participation privacy, keep this in mind when deciding who has access to the Survey.

For full detail on tracking participation, see Monitoring participation in a review.

Step 5: Analyze your results

The Form Responses page

Open the form and navigate to **Responses**. You'll see three views.

Summary shows auto-generated charts for each question, a participation count, and a Group by dropdown that lets you segment results by any of your configured demographic fields. The built-in **Manager or IC** smart bucket is also available as a grouping option. For open-text questions, if AI Summaries are enabled for your org, you'll also see a synthesized written overview of what respondents said.

Sheet shows a list of all responses. For de-identified surveys, only the configured demographic data appears alongside answers — no names or identifying information.

Individual lets you drill into a single response.

When a manager views engagement results filtered to their team (using under:me), the same minimum group size threshold applies. A group that meets the threshold org-wide may still show as "Other" within a manager's slice if their team is small.

Results can be exported from the Form Responses page. For de-identified surveys, the export respects the de-identification rules — the "Other" rollup applies and no individual identities are included.

AI Summaries

When AI Summaries are enabled for your org, ChartHop generates written summaries of responses on the Form Responses Summary page — for every question type, including long-text and short-text. For open-ended questions, this turns a wall of individual responses into a concise overview of themes and sentiment across the group, without reading every response individually.

AI Summaries can also be added to dashboards as text blocks. When placed on a manager dashboard, these blocks re-render based on who's viewing, so each manager sees a summary scoped to their own team's responses. This is the foundation of the Action Plan Insights Dashboard pattern: managers land on a dashboard with AI-generated summaries per question, already filtered to their org, that they can use as a starting point for taking action.

If you don't see summaries appearing on your Summary page, reach out to your ChartHop team to confirm the feature is enabled for your org.

12.8.2. Engagement Dashboards

Building a reporting dashboard

For persistent charts and deeper analysis, build a dashboard using ChartHop's dashboard builder. The core function for pulling engagement survey data is findResponsesByAssessment, which scopes results to a specific survey cycle:

```
findResponsesByAssessment('Survey Name', 'Form
Name').mean{answerValue['<questionId>']}
```

You can group by demographic:

```
findResponsesByAssessment('Survey Name', 'Form
Name').groupBy{submitPerson.department}.mean{answerValue['<questionId>']}
```

Charts using answerValue need to be created and saved through the ChartHop UI using **Advanced Query Mode** — they can't be saved via the API due to a current CQL validation limitation. See the Ask ChartHop section below for how to use AI to scaffold the dashboard for you.

eNPS (Employee Net Promoter Score)

eNPS is not a separate question type. It's a standard numeric scale question with 11 options (0–10). ChartHop automatically applies eNPS scoring logic and displays an NPS indicator on any numeric-scale chart with 11 options.

Scoring: Promoters = 9–10, Passives = 7–8, Detractors = 0–6. Formula: (Promoters – Detractors) / Total respondents.

Add a numeric scale question to your form with 11 options (0–10). A common prompt: *"On a scale of 0–10, how likely are you to recommend [Company] as a place to work?"*

ChartHop's CQL includes a built-in .nps() method for calculating eNPS in dashboard charts:

```
findAnswers('Your eNPS Question Name').nps{it.value}
```

Scoped to a specific cycle and grouped by demographic:

```
findAnswersByFormAssessment('<formId>', '<surveyName>',
'<formName>').groupBy{submitPerson.team}.nps{value}
```

You can also run NPS scoring on any individual question scored 0–10, not just your eNPS question. Use findAnswers with the specific question name, and you get a separate NPS score per question:

```
findAnswers('My Question Name').nps{it.value}
```

Using Ask ChartHop to build your dashboard

Once your survey has launched — or even before responses come in — you can use Ask ChartHop to scaffold your reporting dashboard. Describe what you want, and it will build the chart structure with the CQL expressions you need.

A good starting prompt:

```
"Build me an engagement survey dashboard for our [Survey Name] survey.
Include overall participation rate, average score per question, scores broken
down by department, and an eNPS chart."
```

For more detail:

```
"Create an engagement dashboard for [Survey Name]. I want a participation
chart using findFormTasksByAssessment, average scores for each question
grouped by department, an eNPS chart using the .nps() method, and a heatmap
showing scores across all questions by manager."
```

Ask ChartHop will create placeholder text blocks containing complete, correct CQL expressions. To activate each chart, open the placeholder, change the chart type to the one specified, enable **Advanced Query Mode**, and paste in the expression. The hard work is done — you're just switching the chart type and saving.

Using Ask ChartHop to explore and compare results

Ask ChartHop can also answer natural language questions about your survey results without building anything. Once responses are in, try:

- "Summarize the engagement survey results for the Engineering department."
- "Which department had the lowest average score on the Q1 engagement survey?"
- "What were the most common themes in open-text responses from the April engagement survey?"
- "How did eNPS change between the December 2025 and April 2026 engagement surveys?"
- "Which questions had the biggest score differences between managers and individual contributors?"

Be specific about the survey name, time period, and what you want to know. Ask ChartHop respects the same access rules as the rest of ChartHop — for de-identified surveys, it won't surface individual identity even if asked.

Ask ChartHop is best for on-the-fly exploration and quick reads on results. For persistent charts and saved dashboards, use the dashboard builder.

Comparing results across survey cycles

How you compare cycles depends on how you set up your surveys.

The recommended approach: reuse the same form, create a new Survey each cycle. Since findResponsesByAssessment is scoped by assessment name, each cycle's data is already separated. To compare, duplicate the chart and update the assessment name to the prior cycle. Side-by-side charts give you a clean before/after view:

```
// This cyclefindResponsesByAssessment('Q1 2026 Engagement Survey',
'Engagement Survey').mean{answerValue['<questionId>']}

// Last cycle — on a second chart
findResponsesByAssessment('Q4 2025 Engagement Survey', 'Engagement
Survey').mean{answerValue['<questionId>']}
```

If you duplicate the form each cycle (for example, to update questions), be aware that every dashboard chart references the form by name. If the form name changes, every chart that referenced the old name will break and return no data. Before you launch a new

cycle with a duplicated form, update the form name reference in every chart on your engagement dashboard.

If charts break and you can't identify why, switching to IDs instead of names is the most reliable fix:

```
findResponsesByAssessment('<assessmentId>',
'<formId>').mean{answerValue['<questionId>']}
```

IDs are in the URL when editing a form or survey in ChartHop. They don't change when names do, so they're the safest reference for long-lived dashboards.

The key rule: form names in charts must exactly match the form name in ChartHop. Any rename — even adding a year — breaks every chart that references it until updated.

12.8.3. FAQ

Common questions

Can I add a new demographic field after responses have already come in? Yes, but it requires a form-response migration run by ChartHop. Contact your ChartHop Support team to request this. Any migration requires written approval from your organization's MPOC and should be handled carefully, since it modifies existing response data.

Why did survey tasks disappear before the deadline? A hard deadline on a Survey removes tasks automatically when it passes. The form may still accept responses via direct link, but those responses won't count toward the Survey's participation tracking. To extend a survey, re-send on a new Survey.

How is demographic data captured for de-identified surveys? At the moment of submission. If a respondent's department, location, or other attribute changes mid-cycle, their response is tied to the value in ChartHop at the time they submitted.

Can respondents save a draft and come back to it? Drafts are not supported on anonymous forms. Participants complete the form in one session.

Can I change a survey from de-identified to anonymous after responses are collected? Yes, but it's irreversible. Once responses are migrated to anonymous, the demographic data cannot be recovered. Contact your ChartHop team before making this change.

Can I change a survey from anonymous to de-identified or identified? No. Anonymous responses contain no identity data to restore.

FAQ

What's the difference between anonymous and de-identified? De-identified responses are stored with identity internally but that information is never displayed. Admins see aggregated results by demographic group. Anonymous responses store no identity at all. Neither can be attributed to an individual in the product, but de-identified supports richer demographic reporting.

What's the difference between a question and a field in a form? Fields are ChartHop data points tied to a person's record. Questions are standalone form inputs that don't write to

anyone's profile. For engagement surveys, always use questions. Responses are accessed via answerValue['questionId'] in dashboards.

Who can create and manage engagement surveys? Survey creation and management is available to users with admin-level roles in ChartHop — typically Owner, People Ops Admin, or Org Editor. The exact permissions depend on your org's access policy configuration.

What plan includes Engagement surveys? The Engagement module is a paid package. It's also included in legacy ChartHop Scale and ChartHop Premium plans. Check with your ChartHop contact if you're unsure what's included in your plan.

Can I run a recurring or pulse survey? Yes. Attach your form to a new Survey each cycle and use ChartHop Actions to automate sending on a schedule. Many teams run eNPS on a quarterly cadence.

Does ChartHop automatically notify participants? Yes. When you send tasks through a Survey, every participant receives an initial notification. To send follow-up reminders to only those who haven't completed the survey, go to the **Tasks** tab within the Survey, filter by open or pending status, and send a reminder to that group. Completed respondents won't be included.

For more detail, see Monitoring participation in a review.

Can managers see their team's engagement results? Yes, through a dashboard that's been shared with them. The typical setup is for an admin to build a manager-facing engagement dashboard, then share it out. Charts on that dashboard are built with under:me as a saved filter, so when a manager opens it they automatically see results scoped to their own team. Managers don't have a separate built-in results view — the dashboard is how they access their data.

The minimum group size threshold still applies, so a manager with a very small team may see limited breakdowns.

What's the minimum number of responses before results appear? The default minimum group size is **5** per demographic group. Groups below this threshold roll into "Other." Your org's minimum can be configured as low as **3** in **Admin > Configuration > Modules** under the Engagement section.

What does the "Other" bucket mean in reporting? "Other" represents demographic groups that fell below the minimum group size threshold. To prevent the Other bucket itself

from being too small, ChartHop automatically pulls in the smallest qualifying group and relabels it — for example, "Brazil + Other."

Engagement Survey Question Bank

Overall Sentiment & Experience

Open-Ended Questions (Short/Long Text)

- What motivated you to join this organization?
- What matters most to you in your work?
- How would you describe working here to someone considering joining?
- What has exceeded your expectations since you joined?
- Describe our culture in three words.
- What is this company doing exceptionally well?
- What is one area where we could improve?

Rating Scale Questions (Select a Value)

- I feel connected to this organization.
- I have the resources and tools I need to succeed in my role.
- I am proud to work here.
- My work gives me a sense of personal accomplishment.
- This organization inspires me to go above and beyond.
- I am confident this survey will lead to meaningful action.
- I can achieve my career goals at this organization.
- I would recommend this organization as a great place to work. *(eNPS)*
- I have received adequate training to perform my job effectively.
- I rarely consider looking for opportunities elsewhere.
- Our work processes enable me to be as productive as possible.

Management & Leadership

Rating Scale Questions (Select a Value)

- I trust my manager.
- My manager fosters collaboration within our team.
- My manager keeps me informed about what I need to know.
- I am encouraged to suggest improvements and new approaches.
- I am empowered to make decisions that best serve our customers.
- I have confidence in the CEO's leadership.
- People are held accountable for their performance at this organization.
- Leadership clearly communicates our organization's direction and strategy.
- Leadership demonstrates that employees are valued and essential to our success.
- I receive constructive feedback that helps me improve.
- I trust the leadership team to make sound decisions for our organization.
- I receive meaningful recognition for good work.

Strategic Alignment & Future Outlook

Rating Scale Questions (Select a Value)

- I am confident in this organization's future.
- I understand how my work contributes to our strategic objectives.
- Our daily decisions reflect that customer satisfaction is a priority.

Team Dynamics & Collaboration

Rating Scale Questions (Select a Value)

- I can collaborate effectively with my team members.
- Communication is open and honest, and I feel comfortable sharing my thoughts.
- I feel safe voicing my ideas and opinions, even when they differ from others.
- I am treated with respect at work.
- Communication across the organization is transparent and honest.
- We treat mistakes as learning opportunities.
- Teams collaborate effectively across the organization.

- We share knowledge effectively across different parts of the business.

Survey Design Tips

- Mix question types to balance quantitative data with qualitative insights
- Keep rating scale questions focused on a single concept
- Use consistent language throughout the survey
- Consider survey length and respondent fatigue when selecting questions

13. ChartHop Academy

Your home for learning ChartHop, on a regular cadence, with our team in your corner.

ChartHop Academy is a Customer Success-led training program built for admins like you. Live sessions, weekly office hours, and on-demand recordings, all designed to help you get confident in the platform and stay that way.

What's included

 Bi-weekly Training Sessions Expert-led sessions covering the features and workflows you use most. 45–60 minutes, every other Tuesday at 1:00pm ET.

 Weekly Office Hours Open Q&A with a ChartHop Customer Success Manager and a member of our Support team, every Thursday at 10:00am ET. Bring questions, get answers.

 On-Demand Recordings Can't make it live? Every session is recorded and available in the Academy Hub whenever you're ready.

Get started

 View the full schedule and session recordings in the ChartHop Academy Hub

 Questions? Reach us at successteam@charthop.com

13.1. ChartHop Academy Hub

Welcome to ChartHop Academy, your go-to resource for becoming the ChartHop expert on your team.

Academy is a Customer Success-led training program built for ChartHop admins. You'll find live training sessions, weekly office hours, and on-demand recordings all in one place. Whether you're just getting started or looking to go deeper, there's always something here for you.

Spring 2026 Schedule □□□

Live Training Sessions drop every other Tuesday at 1:00pm ET (10:00am PT). Sessions run 45–60 minutes.

Date	Session
Tuesday, March 31	Admin Training 1: Basic Navigation & Helpful Tools
Tuesday, April 14	Admin Training 2: Data Model & Custom Fields
Tuesday, April 28	Performance Reviews: Setup to Launch
Tuesday, May 12	Engagement Surveys: Setup and Measuring What Matters
Tuesday, May 26	Headcount Planning: Build Smarter Hiring Plans
Tuesday, June 9	What's New, ChartHop? (feat. our Product team)

Office Hours run every Thursday at 11:30am ET (8:30am PT). Open Q&A with a Customer Success Manager, and a member of our Support team. Breakout rooms available for more focused help.

Join Live □

All sessions are hosted on Zoom.

□ **Link to register** - Academy Sessions

□ **Link to register** - Office Hours

Can't make it live? No problem. Recordings are posted here after each session.

Session Recordings

Session	Recording	Resources
Admin Training 1	Recording Link	ChartHop for Admins
Admin Training 2	Recording Link	Managing Data
Performance Reviews	Recording Link	Performance Reviews
Engagement Surveys	Recording Link	Engagement Surveys
Headcount Planning		Headcount Planning
What's New, ChartHop?	Recording Link	Release Notes

Questions?

Reach out to your Success Team anytime.

 successteam@charthop.com

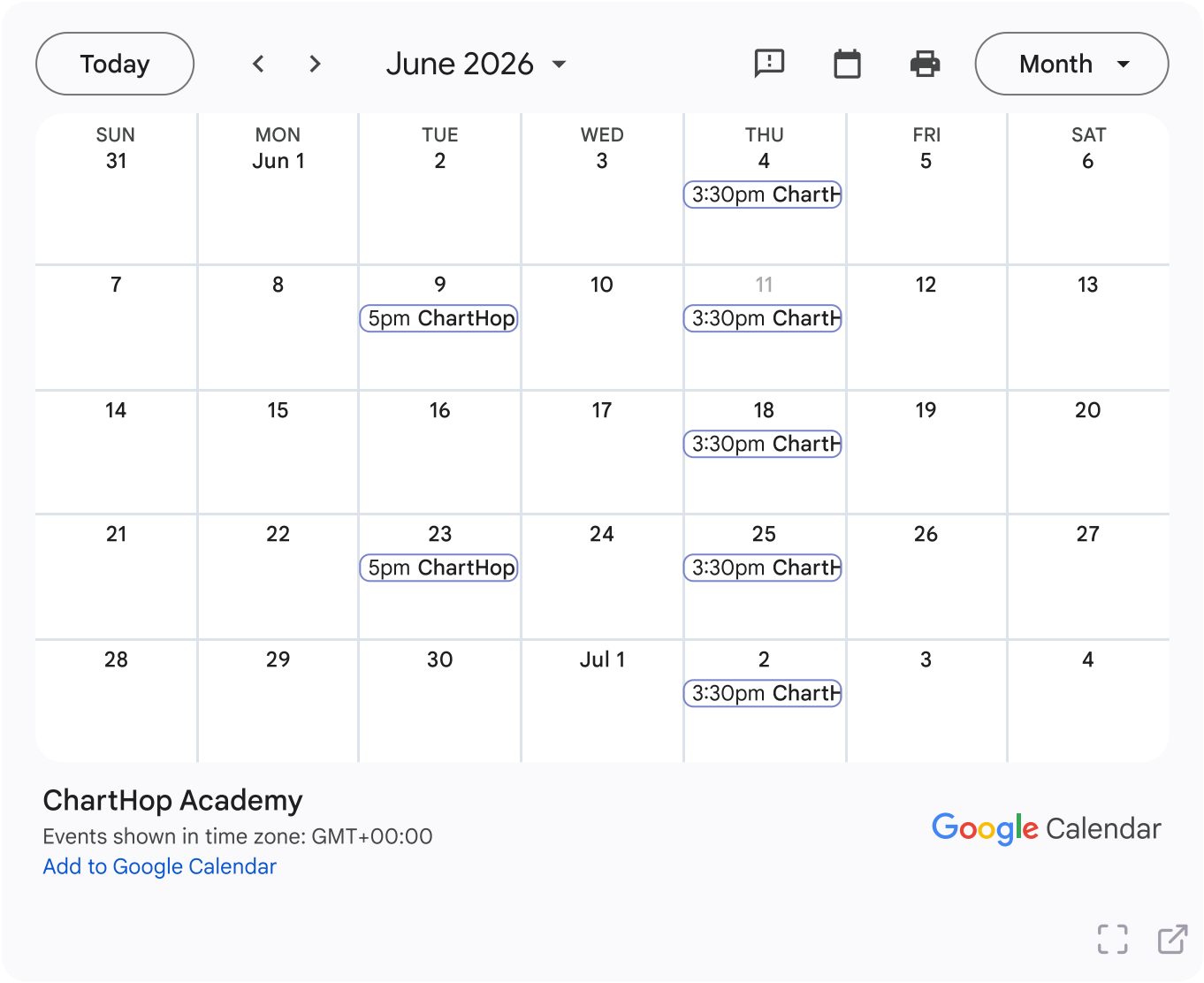
13.2. ChartHop Academy Schedule

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Today
June 2026
Month
SUN 31
MON Jun 1
TUE 2
WED 3
THU 4
FRI 5
SAT 6
3:30pm ChartH
7
8
9
5pm ChartHop
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
Jul 1
2
3
4
ChartHop Academy
Events shown in time zone: GMT+00:00
Add to Google Calendar
Google Calendar

14. Contact support

Employees

If your company uses ChartHop and you have a question about how to use the product or access information please contact your HR, People Operations, Finance or Recruting teams.

If you are experiencing technical difficulties, please contact **support@charthop.com** with as much context as possible.

Administrators

If you're a current ChartHop customer, please reach out to ChartHop support at **support@charthop.com**.

Subscribe to our Status Page for platform alerts at **status.charthop.com**.