OrgPublisher Executive Administrator Guide

OrgPublisher



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Introduction

This document is intended for the OrgPublisher chart administrator and provides guidelines on creating and publishing employee data to OrgPublisher Executive[™] on Apple® iPad®, as well as details on end user capabilities.

This document is meant for use after the implementation of OrgPublisher Executive is completed. Web server configuration for either hosted or on premise implementation is handled by Professional Services.

An actual chart is not created when publishing to OrgPublisher Executive. Employee data is available to filter and view in several layouts.

For help troubleshooting problems viewing a chart, please contact <u>customer support</u>.

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Working with OrgPublisher Chart Data

Verify that OrgPublisher Executive is provided with the fields that you actually want.

For instance, the categories (\blacksquare), filters (\blacksquare), and analytical graphs are driven by the fields you select in the Publishing Wizard. There are several items to consider when importing and formatting your data.

Position Type

We recommend that you create a position type specifically for publishing to the iPad, especially if you have used the Advanced Box Layout Editor for format OrgPublisher chart boxes. This position type helps define what displays in the OrgPublisher Executive People View and Team View. It does not affect data as it appears in OrgPublisher. Use the Define dialog, Positions tab.

	Position type		Priority			Box type	
_	Manager	Yes	0	M	(None)	Normal	
	Employee	Yes	1	E	(None)	Normal	
	Assistant	Yes	0	A	(None)	Assistant	
	Contractor	No	2	С	(None)	Normal	
	Indirect Report						
	Open position	Yes					
_	Partner	Yes	0		(None)	Partner	
_	Staff Function	Yes	0	<sf></sf>	(None)	Staff function	
	Successor	No	65535	<sc></sc>	(None)	Normal	
►	iPad	Yes	0	D	(None)	Normal	
	New	Delete		Move Up	Move Down]	

Figure 1.

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Show/Hide Chart Components

Use the Show/Hide Chart Components dialog to display the selected fields within the specified OrgPublisher Executive position type. It is best to limit your choices to five fields for optimization. These fields display in the boxes in People View and Team View.

Show / Hide Chart Components
Style:
Org Chart V
Components Levels
Image: Second
Group displayed:
Everyone
OK Cancel Apply

Figure 2.

Profile View

Configure the Profile View in the OrgPublisher chart Person (or Name) tab to configure what fields display in the Talent Card. If you want to include position or department information, you can use the standard Box title or Job title fields. You can also create custom fields, such as Position Title or Department.



Figure 3.

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List View

Configure the OrgPublisher List View to display the fields you want to use in OrgPublisher Executive List View. Decisions for optimization should also be made here. The more columns you display, the more data must be synced and processed on the iPad.

List View						
Name:	Job Title:	Box Title:	Phone Number	Head Count	Total Planned Head Count	
Russell O Heis	President	Pacific Eastern	123-456-7999	139	152	
Susan N Hester	Marketing Vice President	Sales	123-456-6999	24	27	
Bobbie T Johnson	Assistant to President	Executive Staff	123-456-5554	0	0	
Paul M Melbram	Creative Vice President	Creative	123-456-6888	37	39	
Sam Patel	HR Vice President	Human Resources	123-456-8000	12	14	
Gregory K Pink	Director of Technology	Information Technology	123-456-7000	19	20	
Edward P Rodriguez	CFO	Finance	123-456-7014	29	33	
Amy Stepp	Director of Media	Media Planning & Buying	123-456-6161	11	12	
		Search View				

Figure 4.

Groups and Group Categories

Consider setting up groups and group categories in OrgPublisher that you can include as options for filtering, analyzing, and categorizing. The Group Editor dialog enables to you to create and edit groups and group categories. These group categories are available as selections when in the Publishing Wizard.

	Se	arch	
Name Job Title Box	Title All Fields Groups		
🐴 New 🛛 Assista	nt 🛛 🗶 🔄 💩 🐴	D _B (t. 88) (Search Now
Impact of Loss			Close
Manager of Loss -	High		
A Impact of Loss -			
A Impact of Loss -	Medium		arch options Search under 🛛 🛶
Performance			selected box
Positions			New Search
Potential			Add to list below
Retention Risk			
			Search within list below
Name:	Job Title:	Box Title:	Email Address
🛧 Russell O Heis	President	Pacific Eastern	Russell.Heis@pa
🛧 Jaime T Hernandez	Creative Vice President	Creative	Jaime.Hernandez
🛧 Jaime T Hernandez	Broadcast Media Director	Broadcast Media	Jaime.Hernandez
🖈 Susan N Hester	President	Pacific Eastern	Susan.Hester@p
🖈 Susan N Hester	Marketing Vice President	Sales	Susan.Hester@p
🖈 Paul M Melbram	Creative Vice President	Creative	Paul.Melbram@p
🛧 Brandi B Nelson	Creative Vice President	Creative	Brandi.Nelson@p
🕈 Brandi B Nelson	Creative Director	Creative Print	Brandi.Nelson@p
<			>
15 people found	=1 E	imail 🜓 Copy 🏽 J Micros	oftExcel 🛏 Save as

Figure 5.

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Filters

Open the Publishing Wizard and select the fields you have already identified to be included as filters () within OrgPublisher Executive.



Figure 6.

Viewable Fields

Choose the OrgPublisher Executive specific position type, as well as the style you want to use. Verify that the Fields displayed in boxes section matches with the fields you identified earlier in the OrgPublisher chart Profile View and Show/Hide Components dialog.

Select a style and position type to be used for fo people and org chart views. Chart Style Contact Information Position Type iPad	ormatting boxes in the
Contact Information Position Type iPad	~
Position Type iPad	~
iPad	
Fields Displayed in the boxes	~
Photo Name: Gender Email Address Impact of Loss	

Figure 7.

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Adding a Custom Logo to OrgPublisher Executive for iPad

With OrgPublisher 11.7, you can configure a custom logo to add to the iPad OrgPublisher display. You may initially confer with your Professional Services associate or work this task on your own.

Configuring the Logo

- 1. Size your chosen logo to fit the same dimensions as the default logo in OrgPublisher Executive for iPad, 154W X 30H.
- 2. Place your logo on the server in an accessible web site location.
- In the associated web.config file (install_location\OPE\service\web.config), change the logo setting. Example:

<add key="OPELogoURL" value="Your URL name here">

If the logo is larger than the size noted in step 1, it will be resized to fit. If it is smaller than the required size, it will not be modified.

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Publishing to OrgPublisher Executive on iPad

In the OrgPublisher chart:

- Verify that the current top box is where you want OrgPublisher Executive to start on iPad. The top of chart cannot be changed after publishing. You can create a new publishing definition with an alternate top of chart and publish.
- If you used the Advanced Box Layout Editor to format chart boxes, create a • position type with basic formatting exclusively for OrgPublisher Executive.
- Review the columns displayed in the List View and the widths of those • columns. Selections made in this view define what the OrgPublisher Executive users see in the List View on iPad. For optimal performance, select less than five columns of data.
- Review the fields in the Profile View under Name. These are the fields shown • in the OrgPublisher Executive Talent Card.
- If you plan to use Active Directory security, verify that the network login and password fields have been imported into OrgPublisher.
- Publish 1. In the main toolbar, click
- 2. Select Advanced Mode and click Next.
- 3. The next dialog is informational only. Click Next.
- 4. Enter a name for your chart and click Next.
- 5. Select Interactive Org Chart and click Next.
- 6. Select Interactive Publishing Type **iPad** and click Next.
- 7. Choose Email options.
- 8. Select a style and position type to be used for formatting boxes in the org chart views.
- 9. Enable the Geographic Mapping Feature to display the geographic location of employees in your organization.
- 10. Select a file name and path for the published chart.
- 11. Specify the URL of the **Virtual Directory** on the Web server.
- 12. Select a chart security option.
- 13. Select iPad Performance options.
- 14. Enable the Data Error Publish Notification Email.
- 15. Create an archive of the published chart.
- 16. Click **Finish** to publish.

OrgPublisher displays the URL for the OrgPublisher Executive data on iPad.



Figure 8.

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Verifying IIS Service

Once the chart data is published and before you open OrgPublisher Executive on iPad:

• Verify **IIS** service is enabled by typing the URL you just created into a browser. A dialog similar to the graphic below should be the result.

S	ervice Service
	iu have created a service. I test this service, you will need to create a client and use it to call the service. You can do this using the svcutil.exe tool from the command line with the following syntax:
	<pre>svcutil.exe http://janettese6510.aqdom.com/OPE/Service/OPEService.svc?wsdl</pre>
	You can also access the service description as a single file:
	http://janettese6510.aqdom.com/OPE/Service/OPEService.svc?singleWsdl
Th	is will generate a configuration file and a code file that contains the client class. Add the two files to your client application and use the generated client class to call the Service

Figure 9.

• Additional samples of a URL for iPad:

Hosted:

https://companyid.peoplefluent.com/companyid/service/opeservice.svc http:// companyid.peoplefluent.com/companyid/service/opeservice.svc

On Premise:

http://janettese6621/OPE/service/opeservice.svc

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Publish Charts to iPad - E-mail Options

When publishing chart data to OrgPublisher Executive, you allow users to send email to members of selected groups.

1. Click the down-arrow in the **Select the email field**, and choose the field in your chart that contains the email address.

Email field	
Select the email field	
Email Address	×
Select the fields and group categories	
Select the fields and group categories	^
	^

Figure 10.

2. In the **Select the fields and group categories** list, click the check box for each item you want available for filtering (**1**), categorizing (**11**), and analyzing.



Figure 11.

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OrgPublisher Executive Chart Style and Position Type Dialog

When you publish to OrqPublisher Executive, you select a chart style and a position type to use as a basis for formatting boxes in the People View and Team View in iPad. When you select a position type to use, the Publishing Wizard lists the fields that display in boxes on the iPad.

Publishing Wizard			
Select a style and position type to be used for formatting boxes in the people and org chart views. Chart Style Croups Position Type Position Type Pields Displayed in the boxes Photo Box Title: Job Title: Name: Email	The field configuration of the OrgPublisher search view will be used to display field data in the list view of OrgPublisher Executive. In addition, the profile view in OrgPublisher will be used to populate the talent card of OrgPublisher Executive. Select the style to use as the source for these configurations. The fields to display in chart boxes is configured per style and position type, and these same settings will be used to specify which fields to display in the boxes in OrgPublisher Executive.		
		0	Select Chart Style.
		2	Select Position Types.
		3	Click Next.
< Back Next >	Cancel Help		

Figure 12.

Creating a Position Type for OrgPublisher Executive

- 1. Select **Edit** from the menu bar, then **Define** from the pull-down menu. The Define dialog opens at the **Positions** tab.
- 2. To create a new position type, click **New**. The last row in the table displays a new position with default information.
- 3. Highlight the text in the field **Position type** and type the new name. This name is not displayed in the chart, but should be something meaningful to you.
- 4. Press the **TAB** key to move to the **Count** column and choose whether or not this position will be counted in the head count roll-up.
- 5. Press the **TAB** key to move to the **Priority** column and select the position priority number. The default of zero is acceptable for this purpose.
- 6. Press the **TAB** key to move to the **Record type** column and select the record type for the position. The default is acceptable for this purpose.
- 7. Press the **TAB** key to move to the **Group** column. Click in the field and select a group from the drop-down list. The default of (**None**) is acceptable for this purpose.
- 8. Press the **TAB** key to move to the **Box type** column and select the chart box type. The default of **Normal** is acceptable for this purpose.
- 9. Click **OK** to accept your entries and close the dialog.

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OrgPublisher Executive Geographic Mapping Dialog

OrgPublisher Executive offers a mapping feature so that you can indicate, using latitude and longitude, where and how many employees are located in which cities or states. OrgPublisher Executive also accepts international data for mapping.





This information is taken from your data file imported into OrgPublisher.



Figure 14.

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This feature requires:

- Internet connectivity
- Three fields, Latitude, Longitude, Map Location Name/Label
 - Best results occur when all person records in the data file contain valid data for each component
 - Use a script to update/populate the component fields
 - Suggested that you use office address, zip code, city/state or city/country as the basis for the script, resulting in fewer data points
 - The custom field **Type** for these fields must be **Text**

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OrgPublisher Executive Chart Security

You can select the type of security to assign to OrgPublisher data on iPad. In addition to the options listed below, you can use the OrgPublisher hierarchical, custom field, and style/group security options.

Chart security options

- **Unsecured** All users can view the entire chart. Enables anyone who has • access to the OrgPublisher Executive application to view the chart data.
 - Require PIN Restricts access to only OrgPublisher Executive users with _ your authorized PIN (Personal Identification Number).
- Secured -.
 - Chart User enters user ID and password only allows users with assigned IDs and passwords access to the OrgPublisher Executive data.

Note: This is the Security option you select when using Active Directory. See the Configuring Active Directory section for more details.

- Allow user to cache password Provides end users with the option to _ make OrgPublisher Executive remember their password.
- **Password field** Selected from your custom field data.
- User ID field Selected from your custom field data.
- Sync data starting at Allows you to choose the level; recommended to _ choose the lowest level possible for iPad efficiency
- Sync interval Require or Recommend sync every X days defaults to 15 days, but you can select a specific timeframe.

Note: Organization levels of All Reports and Direct Reports are available in OrgPublisher Executive only when you add security using this dialog.

 Unsecured - All users can view the entire chart 	Securing your org chart prote sensitive information from bei read by unauthorized
Require PIN	individuals.
O Chart - User enters user ID and password	You may control who can
Allow user to cache password	access the org chart, and wh portion of the hierarchy each
Password field:	v user can view.
User ID field:	To restrict access at the cust field level, visit the Custom Fie
Sync data starting at:	Edit Dialog via the menu item,
Top of chart Supervisor's box	Data/Custom Field Properties.
🔘 User's box	You may also require a sync after a specified interval, as a
Sync interval	additional security measure.
Require v sync every 15 days.	

Figure 15.

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Configuring for Active Directory

The OrgPublisher web.config file must be modified if you plan to use Active Directory as a security option when publishing for iPad. You can <u>prompt for a user ID and</u> <u>domain or use the default domain</u> for multi or single network.

- 1. Create your chart, importing the network ID into the UserID field in the OrgPublisher input file, and save it.
- Navigate to your publish to location folder (default location is C:\Program Files (x86)\OrgPub11\Silverlight\Service) and open the Web.config file.
- 3. Add the following keys to **<appSettings><! Security Settings ->** section:

Setup for Multi-network domain configuration to prompt user for Domain\UserID:

In the service\web.config file in the applications settings section, include the CheckActiveDirectory and ActiveDirectoryDomain keys as shown below:

<add key="CheckActiveDirectory" value="true" /> <add key="ActiveDirectoryDomain" value="" />

Setup for Single/Multi-network domain configuration to use default Domain without prompting the user for the Domain:

In the service\web.config file in the application settings section, include the CheckActiveDirectory and ActiveDirectoryDomain keys as shown below:

<add key="CheckActiveDirectory" value="true" />

<add key="ActiveDirectoryDomain" value="[domain_name]" />

4. Return to OrgPublisher and publish a chart for iPad using the **Chart – User** enters user **ID** and password security option in the Publisher Wizard.

Security Options
Select a chart security option O Unsecured - All users can view the entire chart
Chart - User enters user ID and password Allow user to cache password
Password field: User ID V
User ID field: User ID 🗸
Sync data starting at: Top of chart Supervisor's box User's box
Sync interval
Require v sync every 15 days.

- 5. Publish the chart for iPad and then, before you access the chart on the iPad, navigate to the publishing location.
- 6. Run the **IIS7_Setup.bat** file to complete configuration.
- 7. Open OrgPublisher Executive on the iPad and type the publish to URL (as provided in the Publishing Wizard) into the Settings dialog.

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8. Before the chart data opens, you are prompted to type your user ID and password.

Securing an EChart Custom Field

In addition to the security options selected in the Publishing Wizard, you can also use other security options within OrgPublisher.

You can designate custom fields as not searchable in published charts. The fields are still visible in the chart but end users will not be able to search for them.

1. Select **Data** from the menu bar, then **Custom Field Properties** from the pulldown menu. You can also use the Custom fields button 🥮 in the toolbar. The Custom Field Properties dialog opens.

Custom Field Security
\Box Allow this field to be searchable in the search view and the search dialog. Making a field non-searchable does not hide the field in the chart and other views.
Options for secure ECharts
Fields can be secured based on the user's place in the hierarchy. This field should be viewable in:
Entire chart
◯ User's box and subordinates
O User's subordinates only
Fields can be secured based on a group that the user belongs to. This field should be viewable only by users who are in this group:
Everyone 🗸
Fields can be secured so that they're only visible in the records of members of a certain group:
Everyone 🗸
Note: Fields will be visible only when all of the above criteria are satisfied. For example if a field is set to display for the user's subordinates and group 'X', the field will only be visible in subordinate boxes of users who are in group 'X'.
OK Cancel

Figure 16.

- 2. Position the cursor at the custom field you want to secure and click **Security**. The Custom Field Security dialog opens.
- 3. The **Allow this field to be searchable** check box is a default option. If you do not want end users to search using this custom field, clear the check box.
- 4. Depending on where you want the security to start, based on the end user's place in the chart, select Entire chart, User's box and subordinates, or User's subordinates only.
- 5. If you want to secure fields based on a group, allowing only members of the selected group to view the field, click the down-arrow and choose a group. Accept the default of **Everyone** if you if all users are allowed to view the field.
- 6. If you want to secure fields so that they are only visible in the records of members of a selected group, click the down-arrow and choose a group. Accept the default of **Everyone** if you do not need this feature.
- 7. Click **OK** to return to the Custom Field Properties dialog. Click **Cancel** if you do not want to apply your changes to security. All security criteria must be met in order for the selected custom field to display in the chart.

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Securing Styles to a Group

In securing styles to groups, you must remember that each chart viewer must have access to at least one style.

- 1. Select **File** from the Main menu then **Styles** from the options list. The Styles dialog opens.
- 2. Select the style you want to secure by clicking on it in the top pane of the dialog.



Figure 17.

- 3. In the lower pane, use the down-arrow to select the group to which you want to secure the style. You may also create a new style to secure to a group.
- 4. Click **Close**. The Chart View displays your group and style.
 - Maximum Number of records to sync to iPad defaults to 20,000 records. The more records allowed in the sync process the longer that process takes. Choosing the lowest number possible for your organization helps increase the performance of OrgPublisher Executive in iPad.
 - Maximum Number of levels to sync to iPad defaults to All levels, but you can select a specific number of levels to sync. Choosing the lowest number possible for your organization helps increase the performance of OrgPublisher Executive in iPad.

Setting Data Sync Options in OrgPublisher

You can sync the OrgPublisher Executive data on iPad with your HR in OrgPublisher. If your OrgPublisher installation is on premise, you must have OrgPublisher 11 installed to sync to your data.

The **chart administrator** establishes the sync settings during the publishing process.

1. If OrgPublisher Executive is secured, select the starting point for the data sync.

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2. Select the **Sync data starting** point.

Se	curity Opt	ons		×
Select a chart security option Unsecured - All users can view the entire char Require PIN Chart-User enters user ID and password Allow user to cache password Password field: User ID field: Sync data starting at Top of chart User's box Sync interval Require sync every 15 Recommend	days.	× ×	Securing your org chart protects sensitive information from being re by unauthorized individuals. You may control who can access the org chart, and what portion of hierarchy each user can view. To restrict access at the custom field level, visit the Custom Field E Dialog via the menu item, Data/Custom Field Properties. You may also require a sync after specified interval, as an additional security measure.	the Edit
Require				
	< Back	Next>	Cancel Help	

Figure 18.

- 3. Choose whether to **Recommend** or **Require** a sync.
- 4. Select the photo download option. Choosing to download photos during each sync can affect the iPad performance.

	iPad Performance	×
Photo download options Only download photos when needed (recommended for large charts) Download all photos during sync 		Photos may be sent to the iPad during the sync process to allow all photos to be available once the sync is complete, regardless of iPad connectivity. However, downloading the photos to the iPad as needed provides much better performance and is recommended for large charts.
iPad data sync limits Maximum number of records to sync: Maximum number of levels to sync:	20.000	To optimize performance you may choose to limit the number of records and levels that may be sent to the client during a sync.
	<back next=""></back>	Cancel Help

Figure 19.

5. Select the maximum number of records and levels to sync.

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Installing OrgPublisher Executive on the iPad

iPad End User Responsibilities

You can download OrgPublisher Executive from the App Store at any time.

- 1. Open your browser and go to the Apple store web page and type **OrgPublisher Executive** in the search field.
- 2. When the search results return the OrgPublisher Executive application, click **INSTALL APP**. You must have Apple iTunes installed on the tablet in order to download the free OraPublisher Executive application.
- 3. Once installation is complete, click **OPEN**. OrgPublisher Executive opens to the Settings dialog.

Settings for OrgPublisher Executive must be configured before you can sign in, sync data, or open your HR data. You can, however, view the **Demo** before configuring your iPad settings.

Configuring OrgPublisher Executive Settings on the iPad

iPad End User Responsibilities

The Settings dialog is accessed from the OrgPublisher Executive Home page after you have successfully installed the application.



Figure 20.

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in the upper-right corner of the page.

The OrgPublisher Executive Settings dialog opens.

1. Click the Settings button

Hosted option
Company ID Verify Server
Show demo mode on login screen
DEMO ONLY OK Cancel

Figure 21.

2. If you are a hosted customer, verify that the hosted button in the upper-right corner is set to **ON**, and type your **Company ID** as provided by your administrator. (The Company ID is determined during the implementation process.)

Hosted option	
---------------	--

Figure 22.

If you are not a hosted customer, verify that the hosted button in the upper-right corner is set to **OFF**.

Liested ention	\frown
Hosted option	()
	-

Figure 23.

On premise is the option you want to use when you are accessing data through a "customized domain," whether that domain is on premise or is a non-standard hosted URL.

Other settings options can include: **Entering a PIN**

Edi	t		
	Edi	Edit	Edit

Figure 24.

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Note: The end user is responsible for creating and maintaining the PIN number. If lost, the OrgPublisher Executive settings must be reset and a new PIN number used.

Once the PIN is entered in the Settings dialog, it must be entered on the Home page every time OrgPublisher Executive is accessed. The keypad automatically displays at the bottom of the page.

PIN	
I	
Sign In	Sync



Entering a User Name and Password

The User Name and Password are taken from selected fields in the OrgPublisher data file. The Settings dialog provides a **Remember password** button to allow end users to cache their password, so it is automatically called after entering the **User Name** on the Home page.

User Name	
Password	
Sign In	Sync

Figure 26.

Remember password



If the "caching" is enabled, the keypad automatically displays at the bottom of the Home page to enable typing of the password.

Logging in to a Proxy Server

If OrgPublisher Executive is set up to use a proxy server, the following dialog opens. Type your Login name and Password, then click Login. The keypad automatically opens at the bottom of the Home page.

oxy server
Login

Figure 28.

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Opening Employee Data in OrgPublisher Executive

Once OrgPublisher Executive has been configured, you can access your HR data.

Type the URL to your chart data and click the green Verify Server button Verify Server to the right of the ID field to verify the link.

https://companyid.peoplefluent.com/companyid/service/opeservice.svc

OR

http://YourServerName/OPE/service/opeservice.svc

If the connection is successful, a check mark appears to the right of the URL in the dialog.



Figure 29.

The **Previous server URLs** section can now display the publishing definition for easier identification.

Previous server	URLs Clear
General Secure	http://192.168.1.115/ope/standardsecurity/servi 🗸
General	http://192.168.1.115/ope/unsecure/service/opes

Figure 30.

iPad Sync Process

The **iPad end user** performs the data sync, either at fixed intervals or when notified to do so on the home page. If the **Sign In** option is not enabled on the Home page,

then a **Sync** is required. The sync notice appears below the **sync** button when opening OrgPublisher Executive.

In addition, the iPad user can now open the Settings 🖄 dialog and decide whether or not to **Refresh photos during sync** by turning that option on or off.

Hosted option		\bigcirc
Server setting	s	
Server URL		Verify Server
http://192.168.1.	15/ope/standardsecurity	/service/opeservice.svc
Previous server	URLs Clear	
General Secure	http://192.168.1.115/ope	/standardsecurity/servi 🗸
General http://192.168.1.115/ope/unsecure/service/opes		
Performance	http://192.168.1.115/ope	/unsecure2/service/ope
Show demo m	ode on login screen	
Refresh photos	during sync	-

Figure 31.

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