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 customer support.

Working with OrgPublisher Chart Data

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

For instance, the categories (▦), filters (▼), 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.
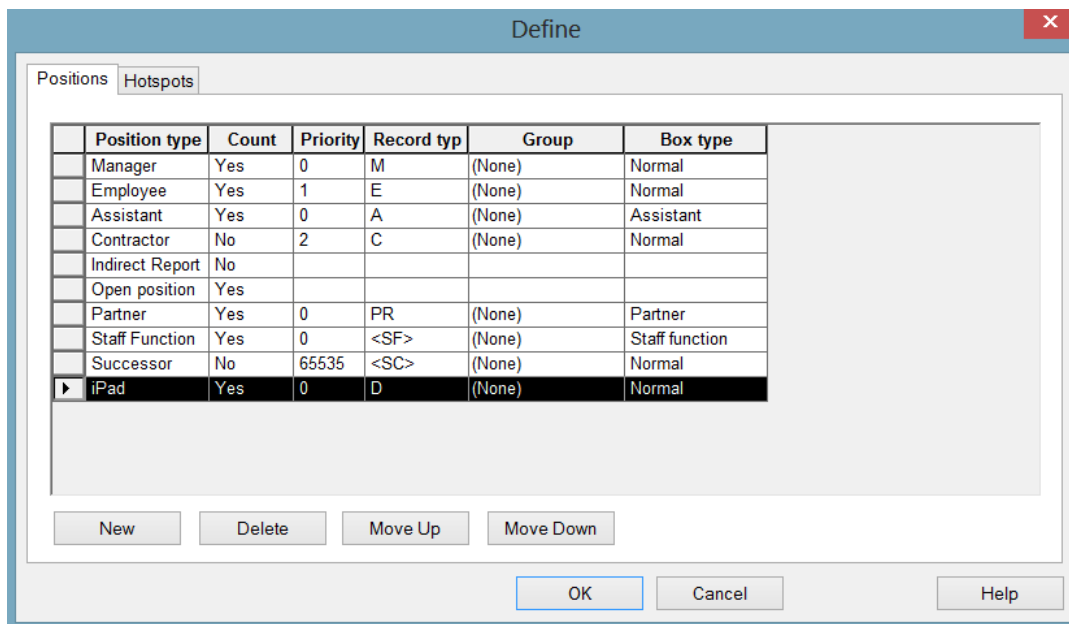

	Position type	Count	Priority	Record typ	Group	Box type
	Manager	Yes	0	M	(None)	Normal
	Employee	Yes	1	E	(None)	Normal
	Assistant	Yes	0	A	(None)	Assistant
	Contractor	No	2	C	(None)	Normal
	Indirect Report	No				
	Open position	Yes				
	Partner	Yes	0	PR	(None)	Partner
	Staff Function	Yes	0	<SF>	(None)	Staff function
	Successor	No	65535	<SC>	(None)	Normal
▶	iPad	Yes	0	D	(None)	Normal

Figure 1.

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.
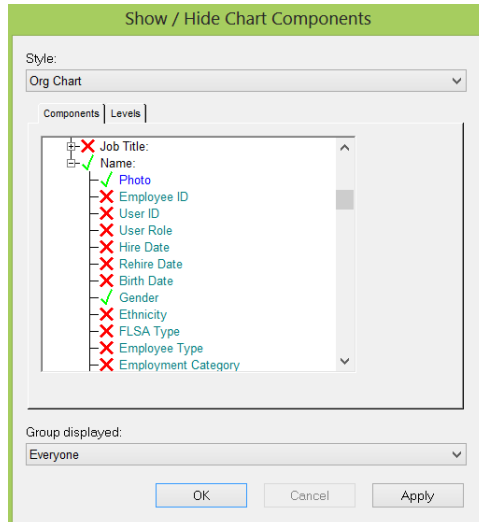

Figure 2.

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.
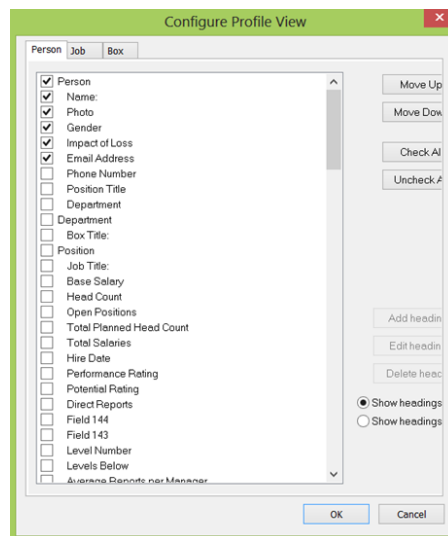

Figure 3.

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.

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

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.
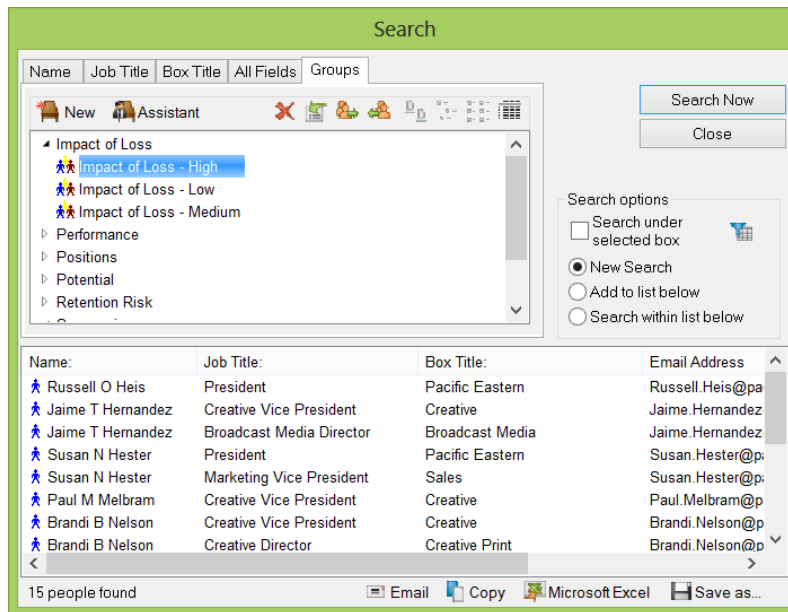

Figure 5.

Filters

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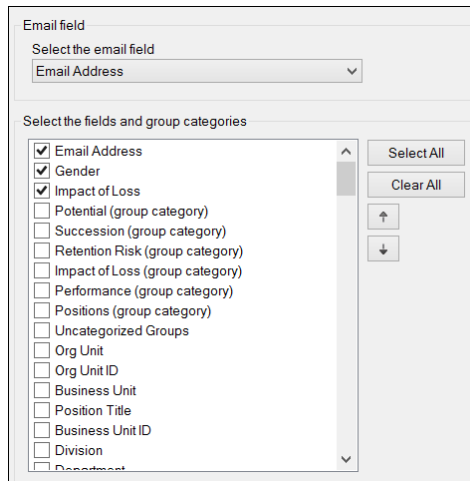

Figure 6.

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.
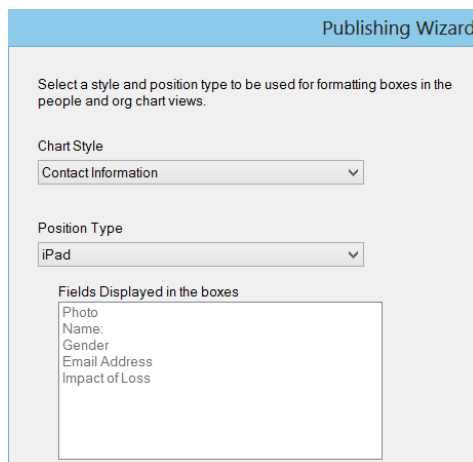

Figure 7.

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.
3. 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.

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.

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.

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.
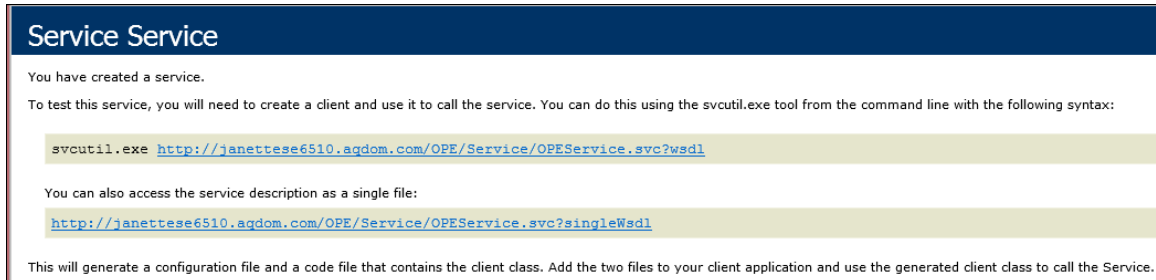

Figure 9.

- 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

Publish Charts to iPad - E-mail Options

When publishing chart data to OrgPublisher Executive, you allow users to send e-mail 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.
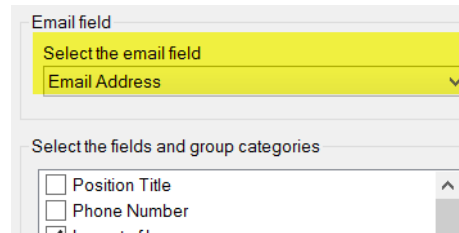

Figure 10.

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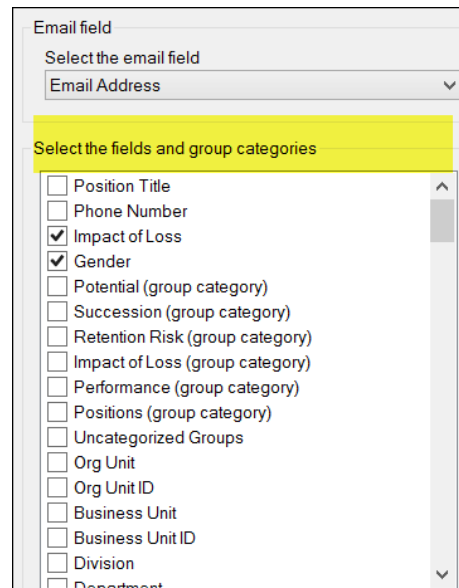

Figure 11.

OrgPublisher Executive Chart Style and Position Type Dialog

When you publish to OrgPublisher 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.
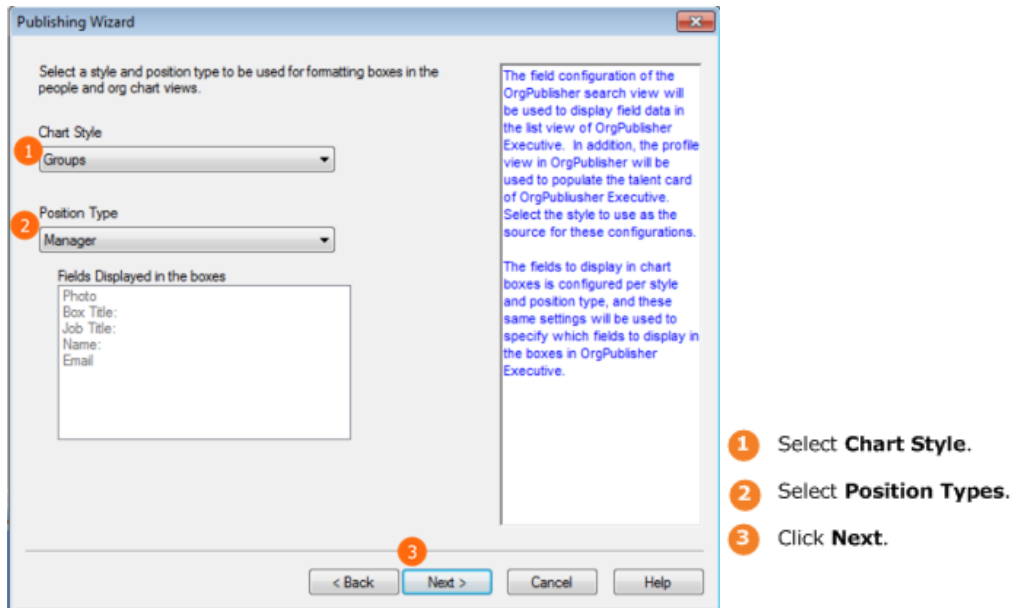

Figure 12.

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.

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.

Figure 13.

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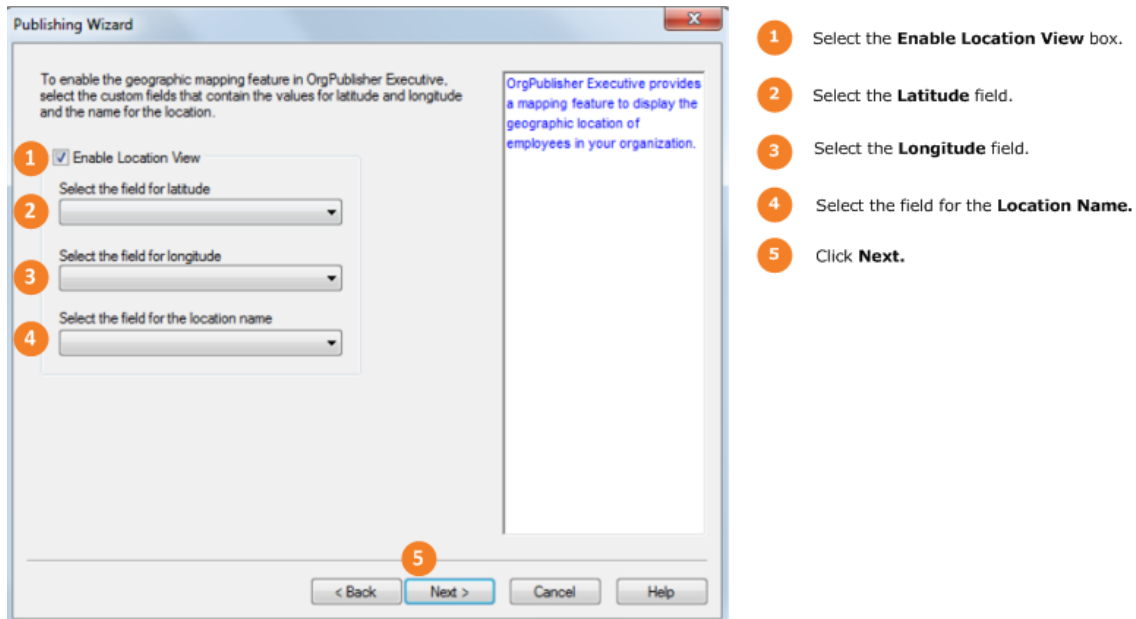

1. Select the **Enable Location View** box.
2. Select the **Latitude** field.
3. Select the **Longitude** field.
4. Select the field for the **Location Name**.
5. Click **Next**.

Figure 14.

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**

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.
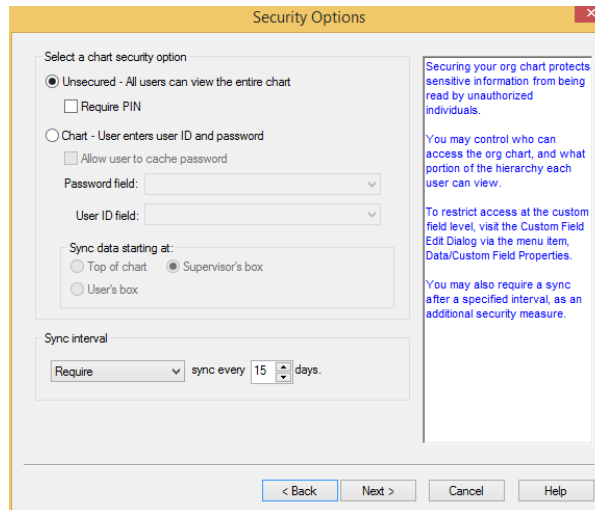

Figure 15.

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 prompt for a user ID and domain or use the default domain 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.
2. 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:
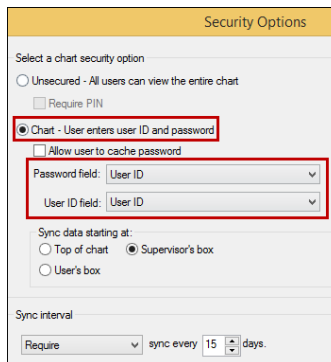
<add key="CheckActiveDirectory" value="true" />

<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.

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.

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 pull-down menu. You can also use the Custom fields button 🗔 in the toolbar.
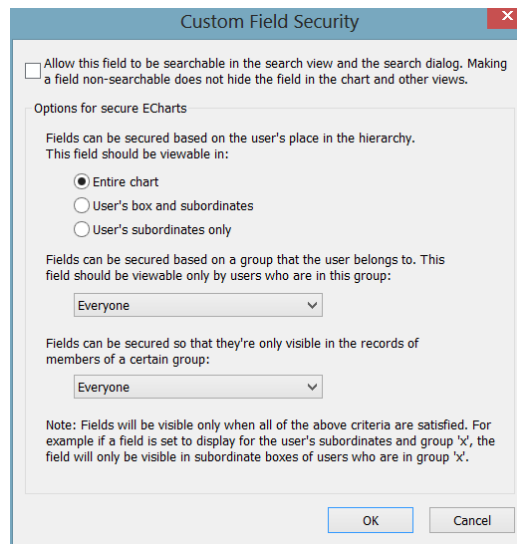   The Custom Field Properties dialog opens.

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.

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.
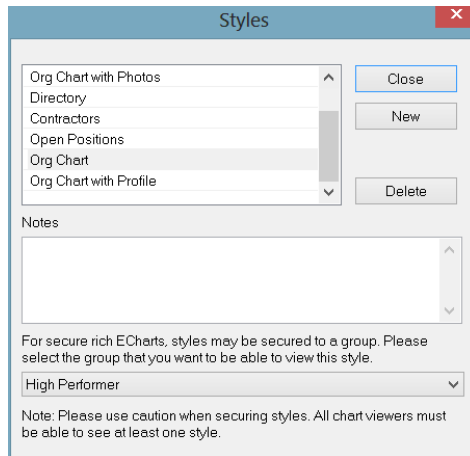2. Select the style you want to secure by clicking on it in the top pane of the dialog.

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.

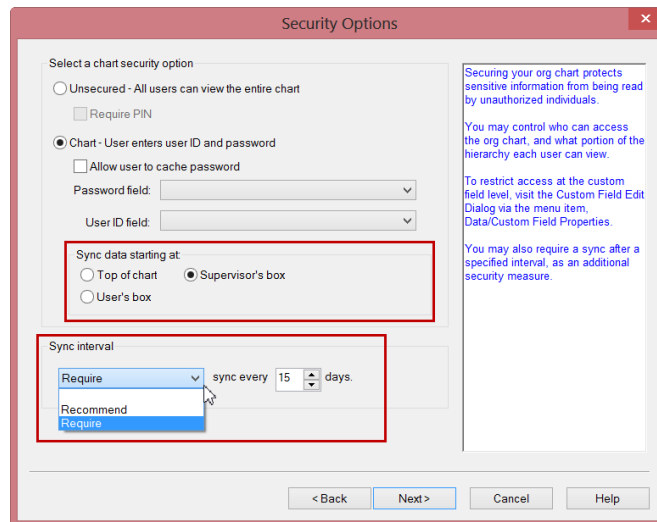2. Select the **Sync data starting** point.

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.
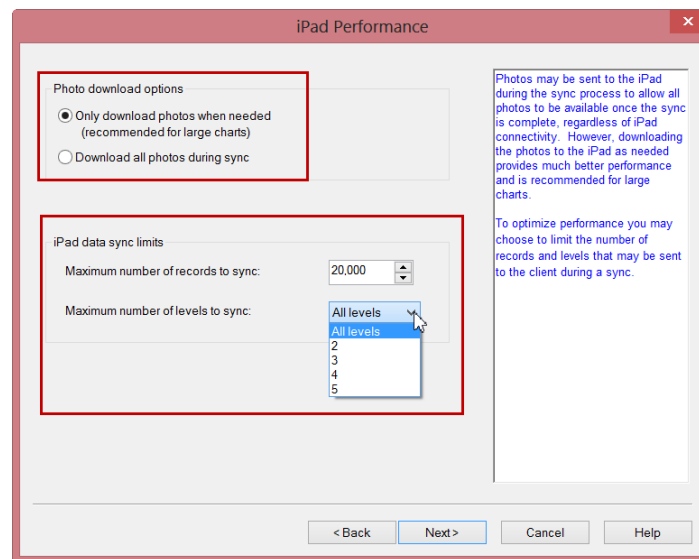

Figure 19.

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

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 OrgPublisher 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.

1. Click the Settings button ⚙ in the upper-right corner of the page.
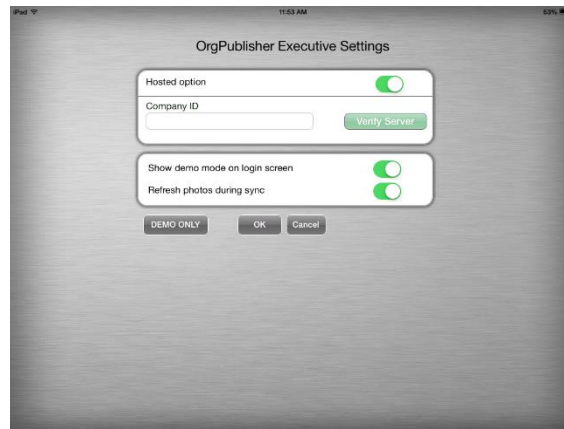   The OrgPublisher Executive Settings dialog opens.

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.)

Figure 22.

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

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:
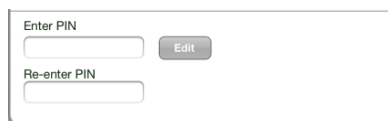**Entering a PIN**

Figure 24.

> **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.

Figure 25.

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.

Figure 26.

Figure 27.

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.

Figure 28.

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.
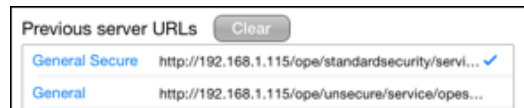
Figure 30.

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.
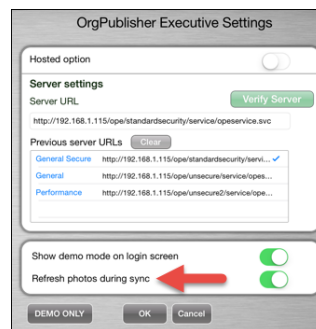

Figure 31.