



OrgPublisher EChart Server Setup Guide

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Introduction

The purpose of this document is to provide the information needed to set up the publishing of OrgPublisher ECharts. This guide provides sets of directions that address configuring the following types of server for ECharts.

- [Windows® Server 2003](#)
- [Windows® Server 2008](#)
- [Windows® Server 2008R2](#)
- [Windows Server® 2012](#)

Role Requirements for Installation

- This installation must be completed by an administrator on the Web Server.
- Creating the Global Group (**OPWeb_GG**) on the Domain Controller must be completed by an administrator on the Domain Controller.

Prerequisites for Installation

- OrgPublisher must be installed on the server.
- You must open OrgPublisher on the server. Launching the application will create an entry in DCOM, which is required later in the server setup.
- Complete the setup of the Global group (**OPWeb_GG**) described in [Configuring Groups](#).

Note: The administrator on the server must have an administrator on the Domain Controller create the Global (**OPWeb_GG**) Group.

About OrgPublisher ECharts

OrgPublisher ECharts are interactive charts with two publishing options, rich client and thin client, explained in more detail below.

About EChart Rich Client Publishing

- Enhanced performance with the ability to process data faster and more efficiently than a standard PluginX chart
- Recommended for publishing large interactive charts with more than 5,000 records
- Advanced security and authentication settings to enable chart, hierarchical, field, and style security
- Full range of toolbar functionality available
- Intended for power users or regular users

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EChart Rich Client Architecture

EChart rich client is recommended for large chart with more than 5,000 records or when using OrgPublisher advanced security options. It provides fast performance for medium to very large charts and provides field level security and Microsoft® Active Directory authentication.

OrgPublisher Echart Rich Client Architecture

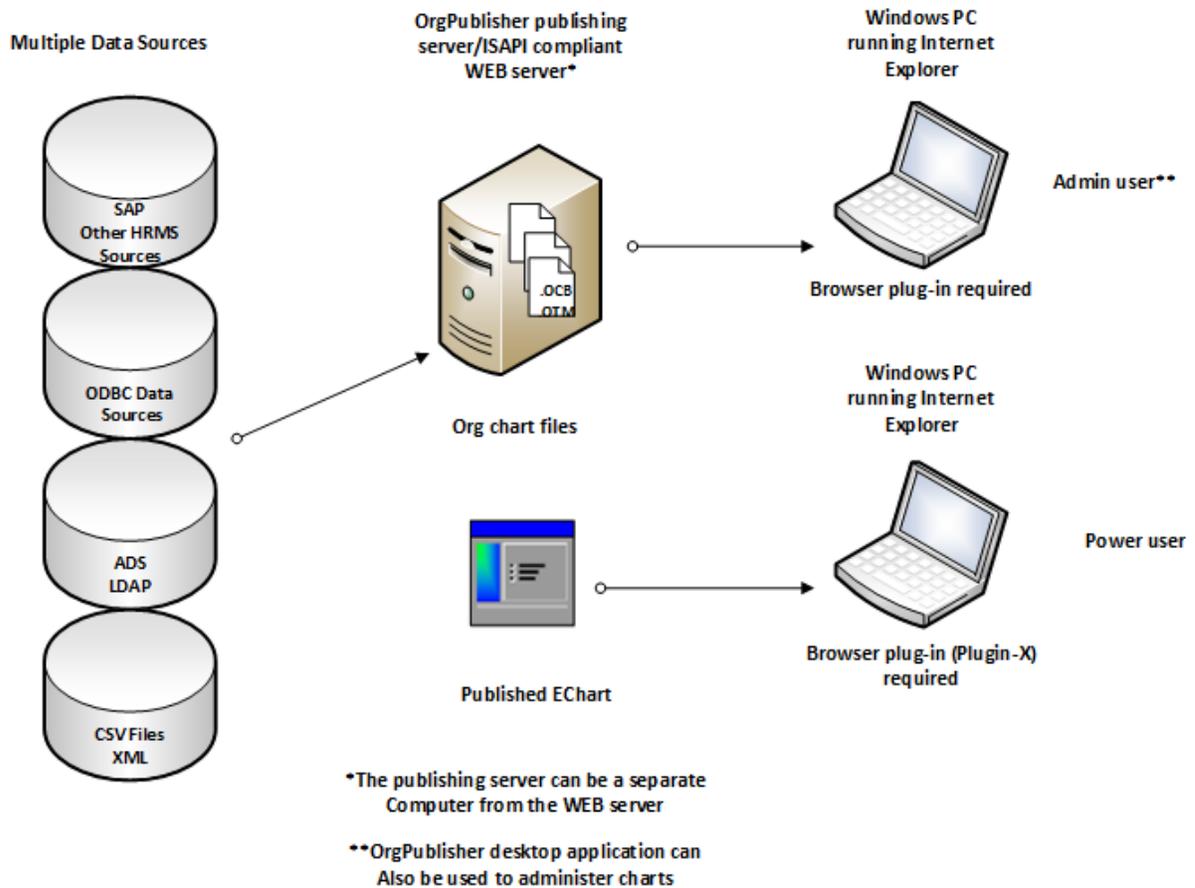


Figure 1.

About EChart Thin Client Publishing

- Cross browser functionality
- No PluginX viewer requirement (Option for locked down client environment)
- Advanced security and authentication settings to enable chart, hierarchical, field, and style security
- Reduced toolbar features in comparison with EChart rich client

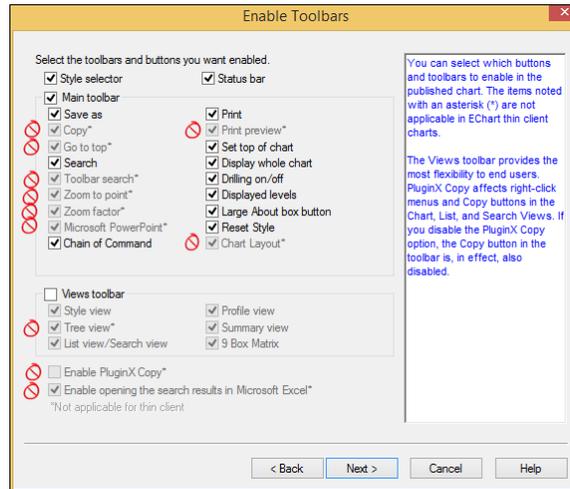
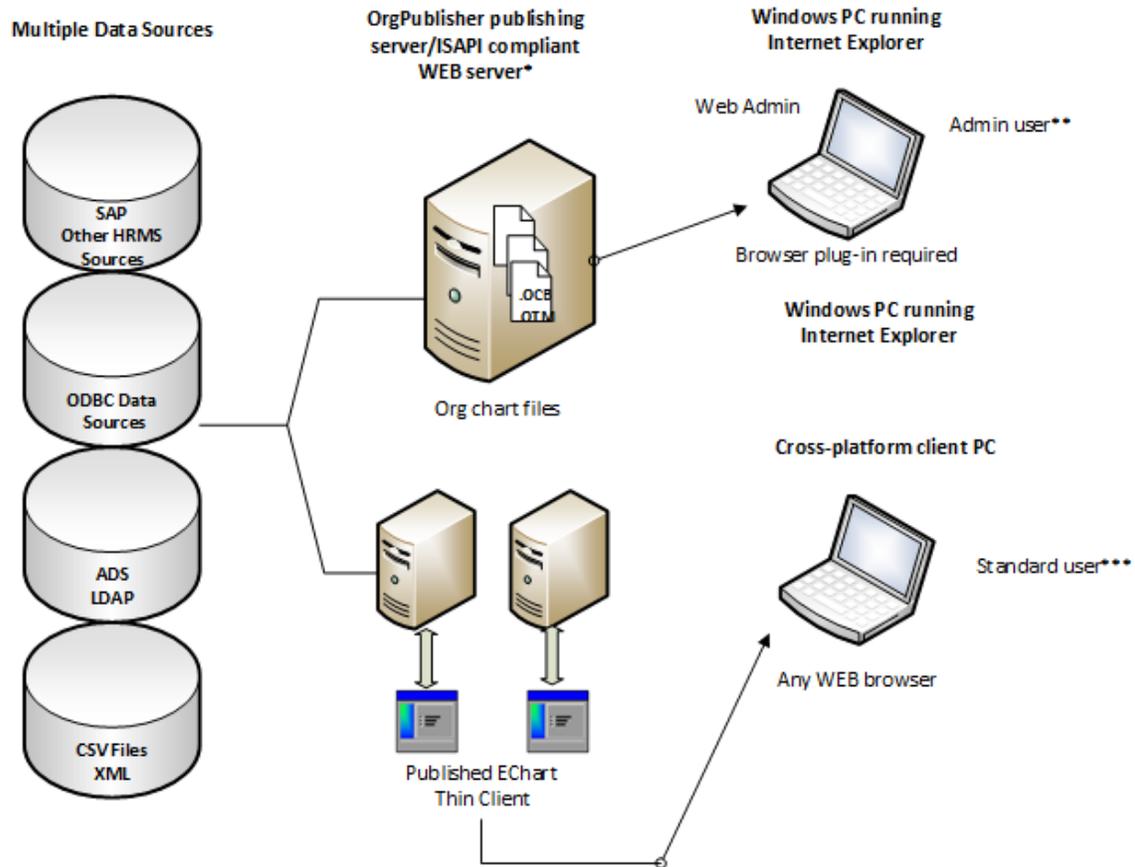


Figure 2.

EChart Thin Client Architecture

Thin Client is an option for locked down client environments and charts can be viewed in any browser (no PluginX viewer requirement). Thin Client also provides advanced security to control chart, hierarchical, or field level access. It does not have as many features as Rich Client. This option is intended for standard end users.

OrgPublisher EChart Thin Client Architecture



- *The publishing server can be a separate Computer from the WEB server
- **OrgPublisher desktop application can Also be used to administer charts
- ***EChart Thin Client Servers using DNS Load Balancing

Figure 3.

Additional EChart Thin Server Requirements

EChart thin client utilizes the server rather than individual user workstations to process the org chart. The EChart thin server hardware requirements can vary, depending on a number of factors, whether the servers are dedicated to only this function or not, and so on. Ultimately, load testing in the working environment will determine the final configuration.

The following table lists recommendations that can serve as a starting point for estimating hardware requirements for thin Client.

Estimating Hardware Requirements for Thin Client				
Number of Records	Dual load Balanced Server Processor	GHz	Memory	Dedicated vs. Shared Server memory
Up to 1000	P4	2	512 MB	1 GB
1001 – 5000	P4	2.5 – 3	1 GB	1.5 GB
5001 – 15000	P4	3	1GB	1.5 GB
15001 – 25000	Dual P4	3	2 GB	2 GB
25000 and up	Dual P4 Hyper Threaded	3	2 GB	2 GB

Configuring Groups

The following groups are required to set up access to publish OrgPublisher ECharts on the server.

Creating a Group on the Domain Controller

Note: The **OPWeb_GG** group must be created by an administrator on the Domain Controller.

1. Create a Global Group title **OPWeb_GG**.
2. Add the OrgPublisher Chart Administrator Users to the global group.

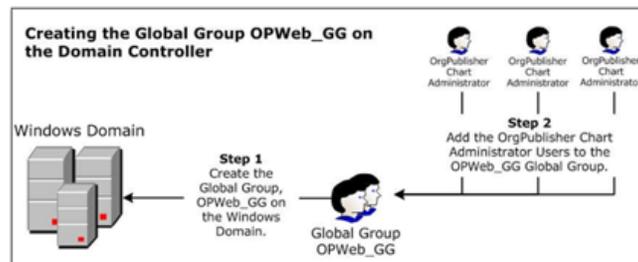


Figure 4.

Creating a Group on the Web Server

Note: The **OPWeb_LG** group must be set up by an administrator on the Server. Setup of the **OPWeb_LG** group must be completed prior to moving on with the installation.

1. Go to **All Programs, Administrative Tools, and Computer Management**.
2. In the Computer Management dialog, expand **Local Users and Groups**.
3. Select the **Groups** folder.
4. In the **Action** menu, select **New Group**.



Figure 5.

5. In the New Group dialog, type **OPWeb_LG** in the **Group Name** field.
6. Click **Add** and select the **Domain Global Group, (OPWeb_GG)** group. Click OK.

- In the New Group dialog, select **Create**. The **OPWeb_LG** appears in the list of Local Groups.

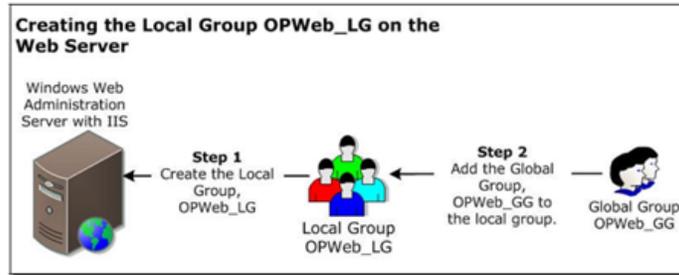


Figure 6.

Windows Server 2003 EChart Setup

Creating the ECharts Folder and Setting NTFS Permissions

1. Navigate to **c:\inetpub\wwwroot**.
2. In the file menu, select **New folder** and name it **ECharts**.

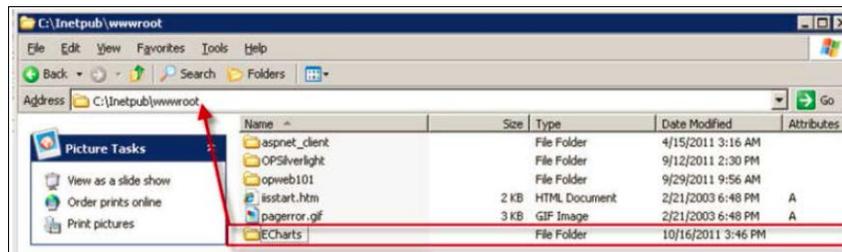


Figure 7.

3. Right-click on the **ECharts** folder and select **Properties**.

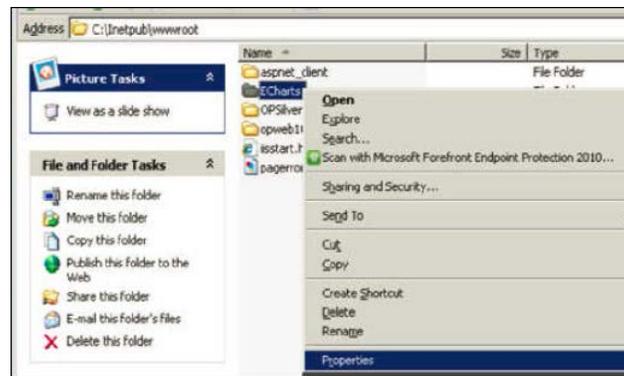


Figure 8.

The ECharts Properties dialog opens.



Figure 9.

4. Select the **Security** tab and click **Add**.
The Select Users, Computers, or Groups dialog opens.
5. Click **Locations**.

The Locations dialog opens.

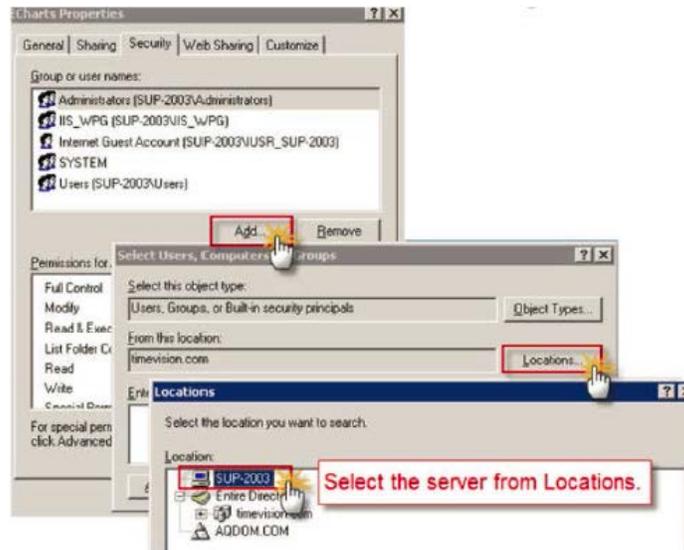


Figure 10.

6. Select the server from the list and click OK to close the locations dialog.
7. In the Select Users, Computers, or groups dialog, click **Advanced**, then **Find Now** in the resulting dialog.
8. In the Search results preview, select the following groups:
 - **Users**
 - **Administrators**
 - **OPWeb_LG**
 - **Network Service**
 - **IIS_WPG** (Worker Process Group)

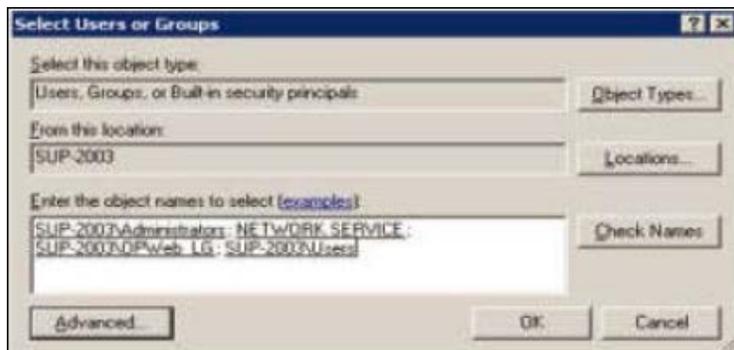


Figure 11.

Click OK to add the groups.

9. Enable the following NTFS permissions:
 - Users group **Read and Execute**
 - Administrators group **Full Control**
 - OPWeb_LG group **Modify**
 - Network Service group **Read and Execute**
 - IIS_WPG **Read and Execute**
10. Click **Apply**. Click OK to close the ECharts Properties dialog.

Creating the OrgPublisher Application Pool

1. In **Administrative Tools**, select **Internet Information Services (IIS)**.
2. In IIS, expand the server folder and then expand **Application Pools**.



Figure 12.

The Add New Application Pool dialog opens.

3. Type **OrgPublisher** in the **Application pool ID** field.



Figure 13.

4. Select **Use default settings for new application pool** and click OK.

Creating the Virtual Directory in IIS

1. In **Administrative Tools**, select **Internet Information Services (IIS)**.
2. In the resulting window, click to expand the server folder, **Web Sites**, then **Default Web Site**.

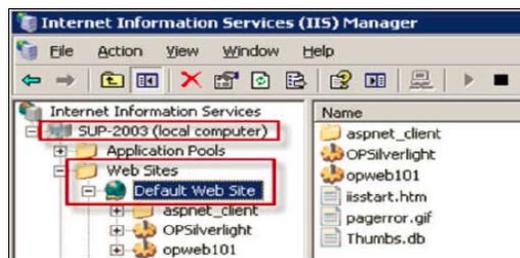


Figure 14.

- Right-click on **Default Web Site** and select **New** then **Virtual Directory**.



Figure 15.

The Virtual Directory Creation Wizard opens. Click Next.



Figure 16.

The Virtual Directory Alias dialog opens.

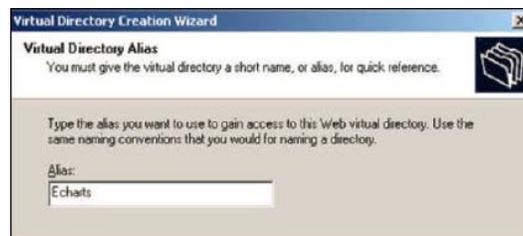


Figure 17.

- Type **Echarts** in the **Alias** field and click Next.

The Web Site Content Directory dialog opens.



Figure 18.

5. Type or **Browse** to the path, **C:\inetpub\wwwroot\Echarts** and click Next.

The Access Permissions dialog opens.



Figure 19.

6. Select the **Read** and **Execute** check boxes. Verify that the other check boxes are cleared. Click Next.

The final Virtual Directory Creation Wizard dialog opens. Click Finish.

Configuring ECharts Virtual Directory in IIS

1. In IIS, right-click on the ECharts virtual directory and select Properties.

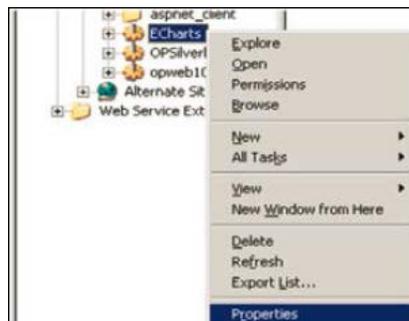


Figure 20.

The ECharts Properties dialog opens at the **Virtual Directory** tab.

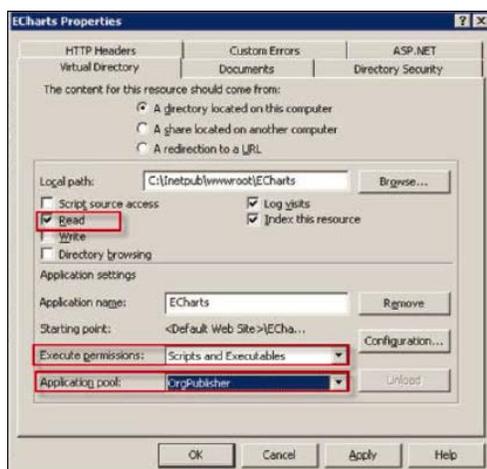


Figure 21.

2. Select the **Read** check box.
3. Select the **Scripts and Executables** option in the **Execute Permissions** drop-down list.
4. Select the **OrgPublisher** option in the **Application pool** drop-down list.
5. Select the **Directory Security** tab and click **Edit** in the **Authentication and access control** section.

The Authentication Methods dialog opens.



Figure 22.

6. Select the **Enable anonymous access** check box.
7. Verify that the **User name** field displays the correct IUSR account name.
8. Select the **Integrated Windows authentication** check box and click OK.
9. Select HTTP headers tab and click MIME Types at the bottom of the dialog.

The MIME Types dialog opens.

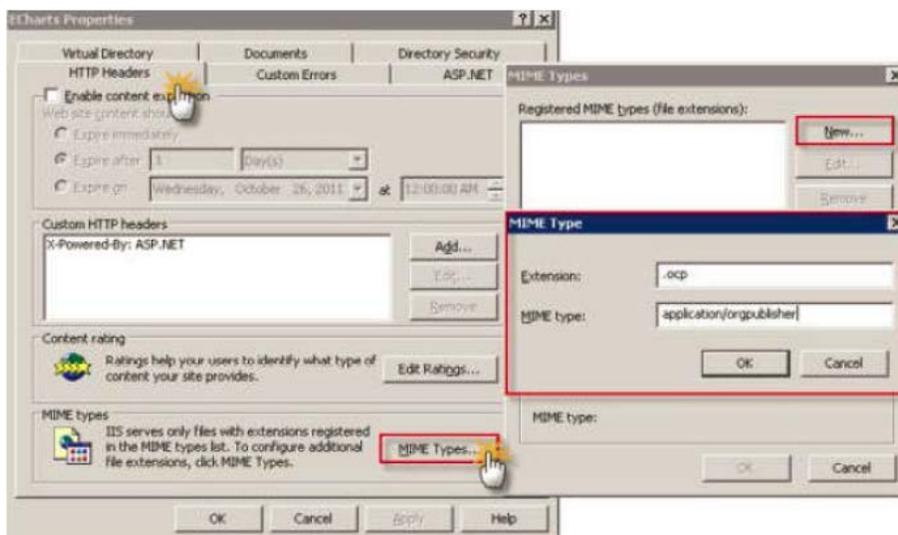


Figure 23.

10. In the **MIME type** field, type **application/orgpublisher**. Click OK three times to exit the dialogs.

Enabling All Unknown ISAPI Extensions

Note: These steps enable ALL Unknown ISAPI extensions to run on the web server. If your IT security policy restricts allowing all ISAPI extensions, refer to the [When Allow All Unknown ISAPI Extensions is Restricted](#) section for an alternate configuration.

The directions in this section require a one-time setup by the Web Server administrator. Using the alternate setup, the Web Server administrator must [enable each chart_DLL](#) web extensions each time a new chart is published by the chart administrator.

If you are unsure which setup to use, contact your Domain administrator to clarify which directions meet the requirements of your IT security policy.

1. In **IIS**, select the **Web Service Extensions** folder.
2. In the **Web Service Extensions** list, right-click on **All Unknown ISAPI Extensions** and select **Allow**.



Figure 24.

3. Click **Yes** at the security prompt to enable all unknown ISAPI extensions.

When Allow All Unknown USAPI Extensions is Restricted

Note: If you followed the directions in the above section, [Enable All Unknown ISAPI Extensions](#), skip this section and continue with [Setting Up DCOM Permissions](#).

Using the configuration in this section, the Web Server administrator must [enable each chart .DLL](#) web extension when new charts are published by the chart administrator. You will not be able to complete this section until an EChart has been published.

If you are unsure which setup to use, contact your Domain administrator to clarify which directions meet the requirements of your IT security policy.

The directions below are intended for organizations that cannot set **All Unknown ISAPI Extensions** to **Allow**. When a new chart is published, a .DLL file is produced. This is visible in the ECharts folder (**C:\inetpub\wwwroot\ECharts**).



Figure 25.

1. Open **IIS** and select **Web Service Extensions**.
2. Under **Tasks**, click **Add a new Web service extension**.

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The New Web Service Extension dialog opens.

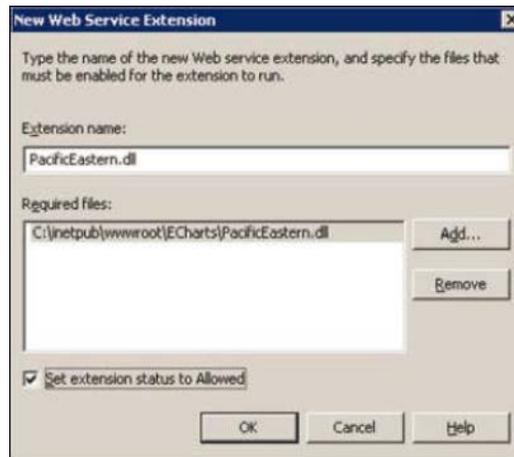


Figure 26.

3. Type the new .DLL name in the **Extensions name** field (example: **PacificEastern.dll**) and click **Add**.

The New Web Service Extension dialog refreshes.

4. Type the path to the new chart .DLL in the **Extension name** field (example: **C:\inetpub\wwwroot\ECharts\PacificEastern.dll**) and click **OK**.

The New Web Service Extension dialog refreshes again.

5. Select the **Set extension status to Allowed** check box and click **OK** to close the dialog.

Note: Each time a new chart is published (and a new .DLL is produced), the chart administrator must follow the Steps 1 – 5 as noted in this procedure. If not, the end users cannot view the EChart.

Setting Up DCOM Permissions

1. Launch OrgPublisher on the server and close the application after it opens successfully.
2. Click **Start** on the task bar and select **Run**.

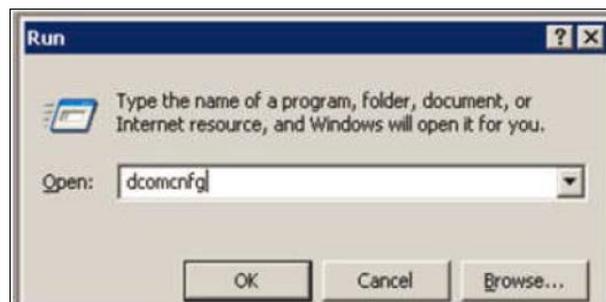


Figure 27.

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3. Type **dcomcnfg** and click OK.
4. Expand **Component Services, Computers, and My Computer**.
5. Select **DCOM Config** and, in the right pane, right-click on **OrgPublisher X Document** and select **Properties**.

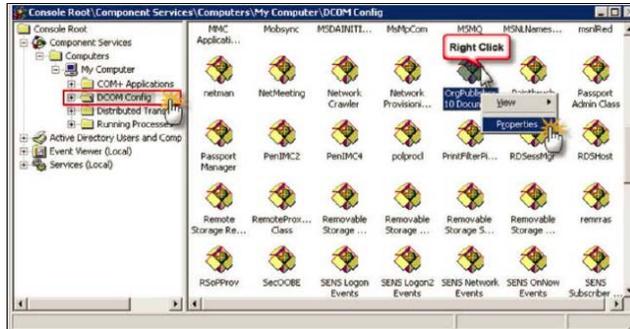


Figure 28.

Note: If you installed a previous version of OrgPublisher on your computer, you see **OrgPublisher X Document**, where **X** is the previous version number. Use that document.

The OrgPublisher X Document Properties dialog opens.

6. Select the **Security** tab.



Figure 29.

7. Click **Edit** in the **Launch and Activation Permissions** section.
8. Click **Add** and, in the resulting dialog, click **Locations**.

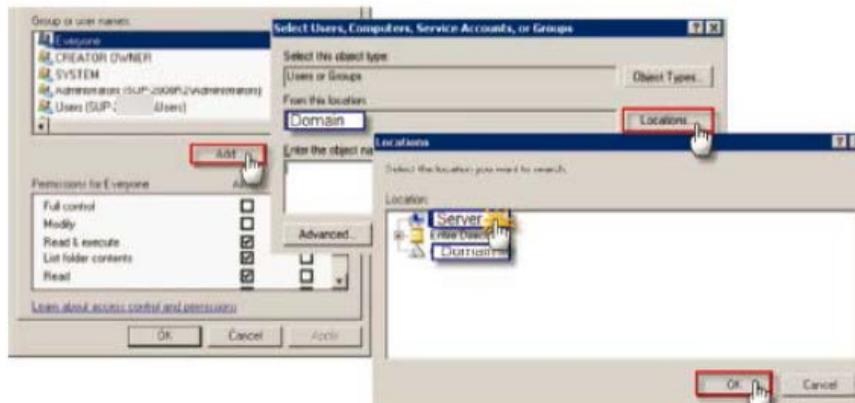


Figure 30.

9. Change the **Location** to the **Server** and click OK.
10. In the Select Users or Groups dialog, click **Advanced** and, in the resulting dialog, click **Find Now**.

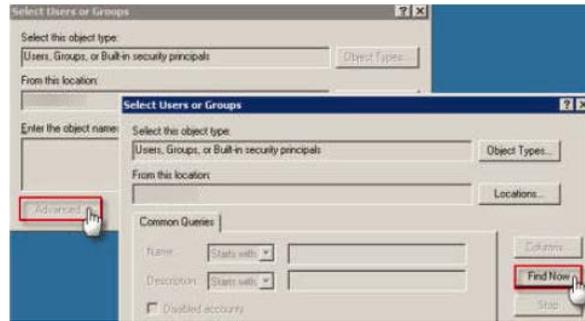


Figure 31.

11. Add the following groups and accounts:

- Local **Administrators**
- Local **Interactive**
- Local **IUSR**
- Local **IWAM**
- Local **Network**
- Local **Network Services**
- Local **OPWeb_LG**
- Local **System**

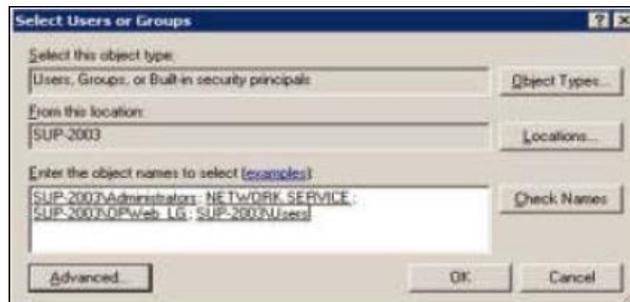


Figure 32.

Click OK to add the groups and accounts.

12. Enable the following **Launch and Activation Permissions**:

- Local Administrators – **Local Launch**
- Local Interactive – **Local Launch**
- Local IUSR – **Local Launch**
- Local IWAM – **Local Launch**
- Local Network – **Local Launch**
- Local Network Services – **Local Launch**
- Local OPWeb_LG – **All options**
- Local System – **Local Launch**

Click OK to close the dialog.

13. Click **Edit** under **Access Permissions**.

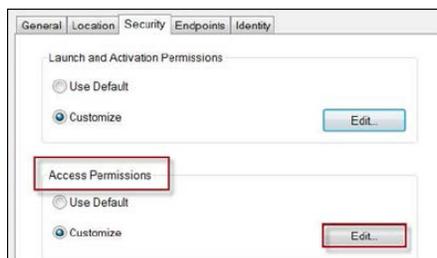


Figure 33.

14. Click **Add**. Click **Locations** and change the location to the **Server**. Click OK.
 15. Click **Advanced** in the Select Users or Groups dialog. Click **Find Now**.
 16. Select the following groups from the search results:

- **Local Administrators**
- **Local Interactive**
- **Local IUSR**
- **Local IWAM**
- **Local Network**
- **Local Network Services**
- **Local OPWeb_LG**
- **Local System**

Click OK to add the groups.

17. Enable the following Access Permissions:
- Local Administrators – **Local Access**
 - Local Interactive – **Local Access**
 - Local IUSR – **Local Access**
 - Local IWAM – **Local Access**
 - Local Network – **Local Access**
 - Local Network Services – **Local Access**
 - Local OPWeb_LG – **Both options**
 - Local System – **Local Access**

Click OK to close the Launch and Activation Permissions dialog. Click OK again to close the OrgPublisher X Documents window.

Note: Your Windows 2003 EChart Server Setup is complete. Proceed to [Testing EChart Publishing](#).

Windows Servers 2008, 2008R2, and 2012 EChart Setup

Installing IIS

Installing IIS on Servers 2008, 2008R2, and 2012 is a prerequisite for installing ECharts.

When using the Add roles Wizard to install IIS, you get the default installation, which has a minimum set of role services.

1. Click **Start, All Programs, Administrative Tools, and Server Manager**.
2. Scroll down to **Roles Summary** in the Server Manager window and click **Add Roles**.



Figure 34.

3. In the Add Roles Wizard, verify that, per the bullets in the dialog:
 - The administrator account has a strong password
 - The network settings, such as IP addresses, are configured
 - The latest security updates from Windows Update are installed

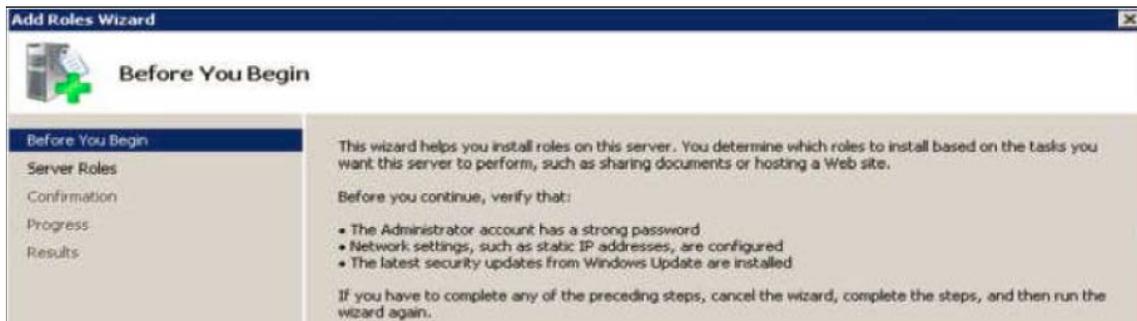


Figure 35.

If all points are met, click Next.

4. Select **Web Server (IIS)** in the **Roles** list.

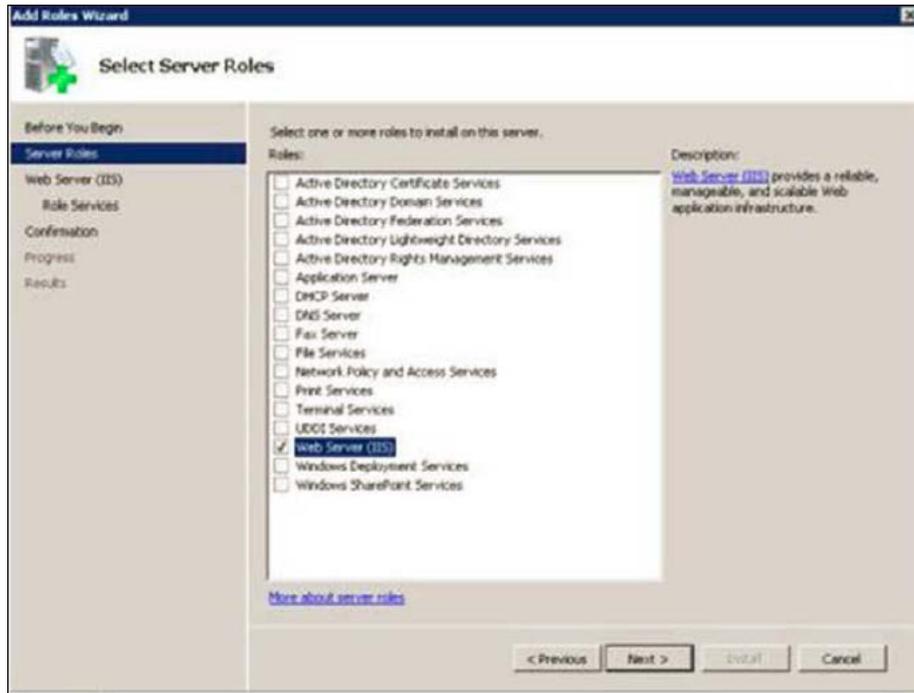


Figure 36.

Click Next.

5. Review the additional information and links in the Introduction to Web Server (IIS) dialog.

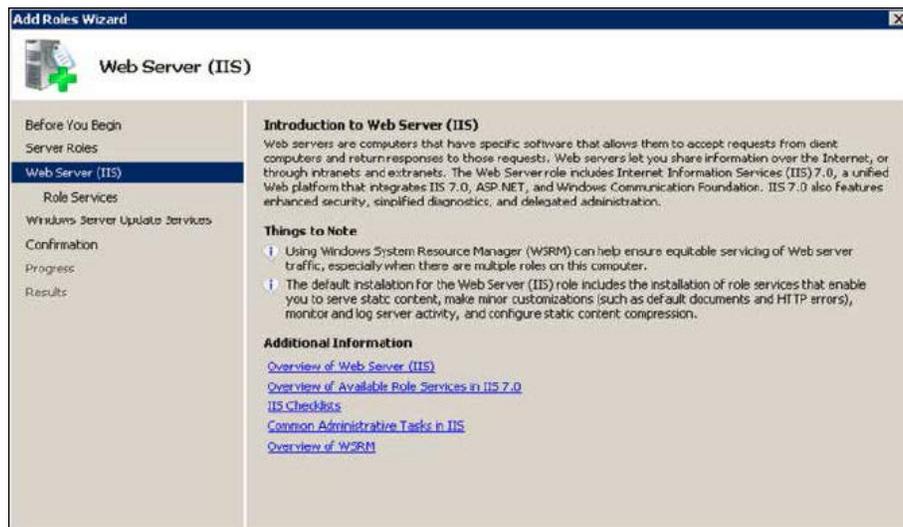


Figure 37.

Click Next.

6. Click **Install** in the Confirm Installation Selections dialog.

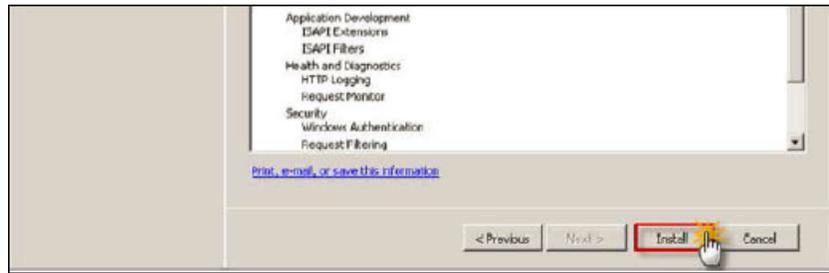


Figure 38.

7. Verify that the installation was successful in the Installation Results dialog.

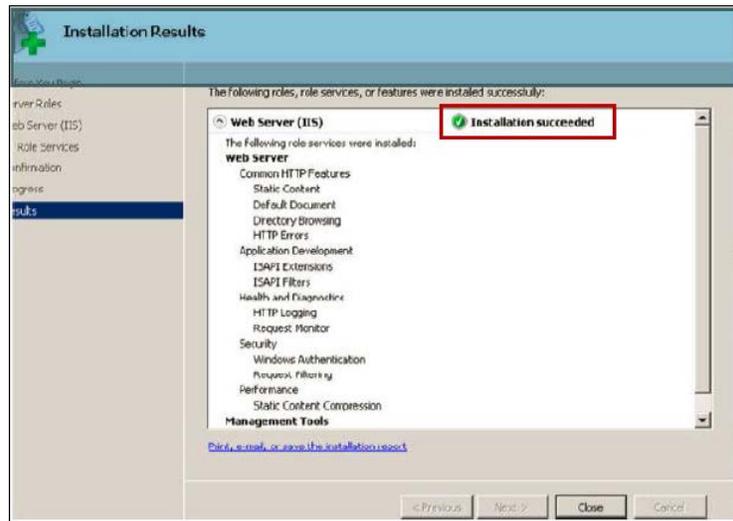


Figure 39.

Click **Close**.

8. Confirm that the Web server works by opening Internet Explorer and typing <http://localhost>. The following image appears.



Figure 40.

Creating the ECharts Folder and Setting NTFS Permissions

1. Navigate to **C:\inetpub\wwwroot**.
2. In the **File** menu, select **New Folder** and name that folder **ECharts**.

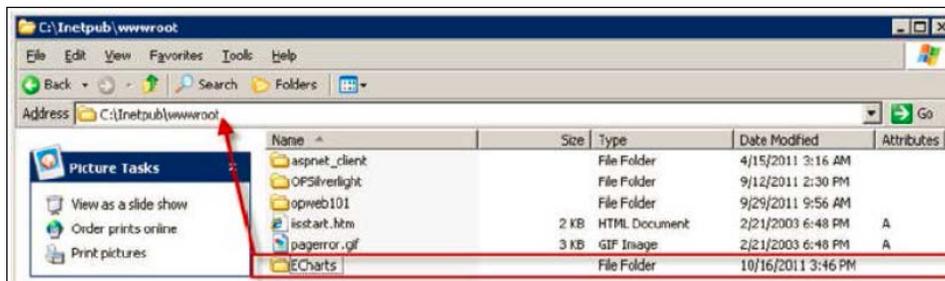


Figure 41.

3. Right-click on the **ECharts** folder and select **Properties**.

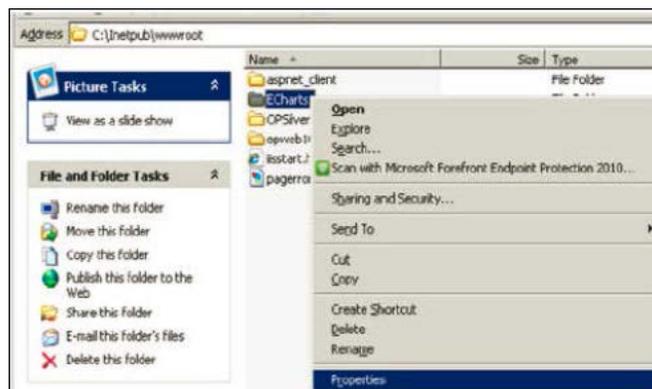


Figure 42.

The EChart Properties dialog opens.

4. Select the **Security** tab and click **Add**.
The Select Users, Computers, or Groups dialog opens.
 5. Click **Locations** and select the server in the Locations dialog. Click **OK**.
 6. In the Select Users, Computers, or Groups dialog, click **Advanced**.
 7. In the resulting dialog, click **Find Now** and select the following groups from the search results list:
 - **Users**
 - **Local Administrators**
 - **OPWeb_LLG**
 - **Network Service**
- Click **OK** to add the groups.

8. Enable the following NTFS permissions:

- Users – **Read and Execute**
- Administrators – **Full Control**
- OPWeb_LLG – **Modify**
- Network Service – **Read and Execute**

Click Apply. Click OK to close the ECharts Properties dialog.

Creating the OrgPublisher Application Pool

1. Click **Start, All Programs, and Administrative Tools**.
2. Expand the Server name and right-click on **Application Pools**. Select **Add Application Pool**.



Figure 43.

The Add Application Pool dialog opens.



Figure 44.

3. Type OrgPublisher in the **Name** field and click OK.

Additional Server 2008R2 Application Pool Setup Instructions

Note: the settings in this section are unique to 2008R2 servers. If you are configuring ECharts on a 2008 or 2012 server, continue on to [Creating the Virtual Directory](#) section.

1. Right-click on the OrgPublisher **Application Pool** and select **Set Application Pool Defaults**.

- In the general section, set **Enable 32-bit Applications** to **True** and then click OK.

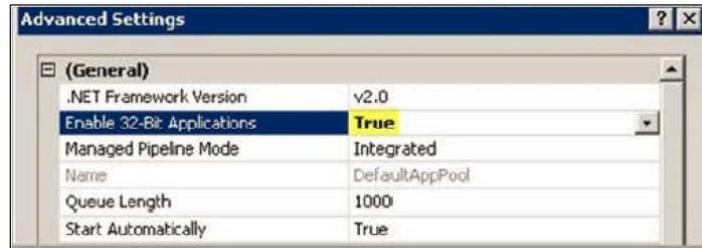


Figure 45.

Creating the Virtual Directory in IIS

- Expand the server, **Sites**, and **Default Web Site**.
- Right-click on **Default Web Site**, select **New**, then **Add Virtual Directory**.

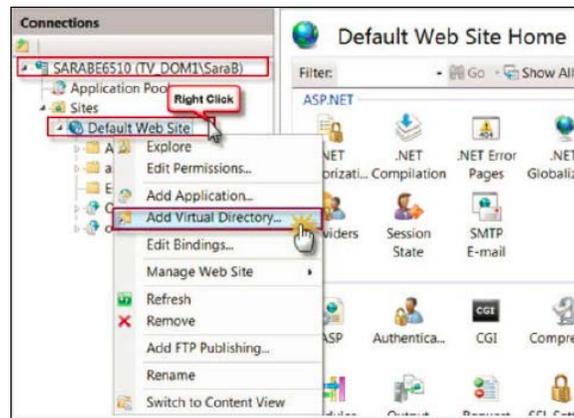


Figure 46.

The Add Virtual Directory dialog opens.

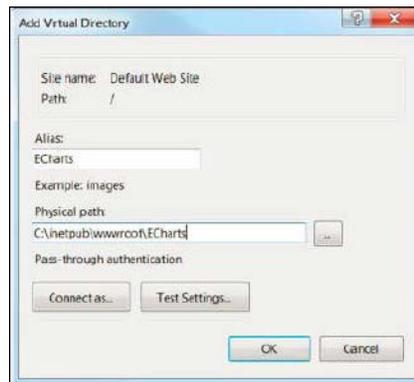


Figure 47.

- Type **ECharts** in the **Alias** field.

4. Type **C:\inetpub\wwwroot\ECharts** in the **Physical path** field and click OK.
5. Right-click on the **ECharts** folder and select **Convert to Application**.

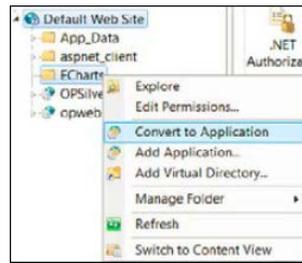


Figure 48.

The Add Application dialog opens.

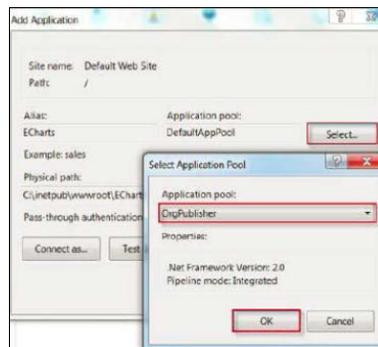


Figure 49.

Click OK. Click OK again to close the dialogs and return to the **Connections** pane of the Internet Information Services (IIS) Manager window.

Setting Up IIS Authentication

1. In the **Connections** pane, select the **ECharts** virtual directory folder. The **/ECharts Home** window opens.

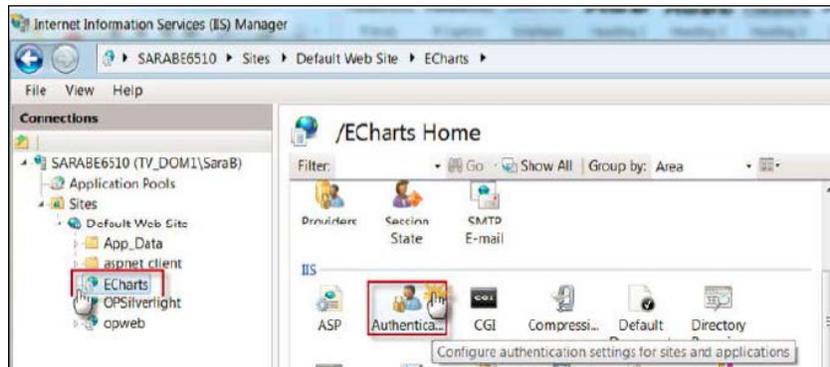


Figure 50.

2. Double-click **Authentication** in the **IIS** section.

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3. Right-click to enable or disable the following Authentication settings:
 - **Anonymous Authentication** – Enable
 - **Windows Authentication** - Enable

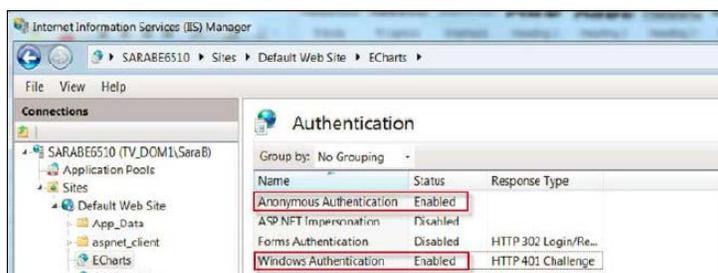


Figure 51.

Setting the MIME Type

1. In the **Connections** pane, select **opweb**.

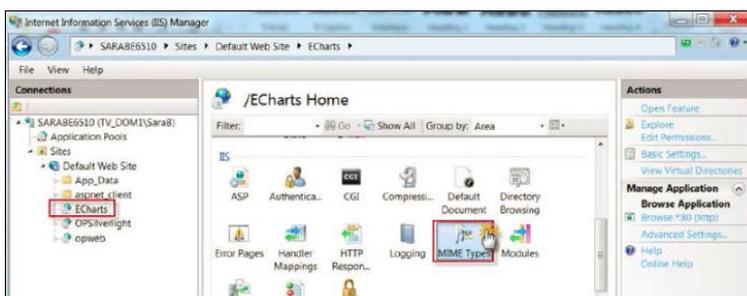


Figure 52.

2. Double-click **MIME Types** in the **IIS** section.
3. Click **Add** in the **Actions** panel on the right.

The Add MIME Type dialog opens.

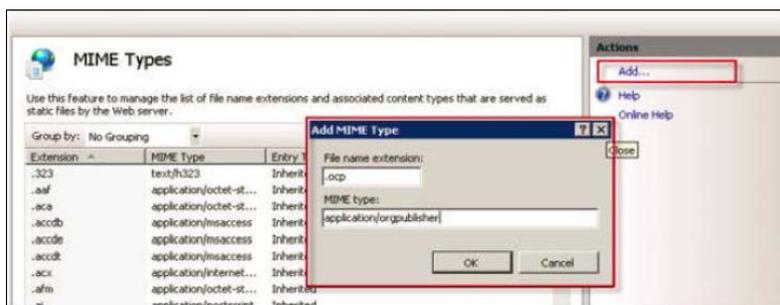


Figure 53.

4. Type **.ocp** in the **File name extension** field.
5. Type **application/orgpublisher** in the **MIME type** field and click OK.

Setting Up ISAPI Extensions and Handler Mappings in IIS

Note: These steps enable ALL Unknown ISAPI extensions to run on the web server. If your IT security policy restricts allowing all ISAPI extensions, please refer to [When Allow ALL Unknown ISAPI Extensions is Restricted](#) section for an alternate configuration.

The directions in this section require a one-time setup by the Web Server Administrator. Using the alternate setup, the Web Server administrator must [enable each chart .DLL](#) web extension each time a new chart is published by the chart administrator.

If you are unsure which setup to use, contact your Domain administrator to clarify which directions meet the requirements of your IT security policy.

1. In the **Connections** pane, select Server.
2. Double-click **ISAPI and CGI Restrictions** in the server Home window.



Figure 54.

The ISAPI and CGI Restrictions window opens.



Figure 55.

3. Click **Edit Feature Settings** in the **Actions** pane on the right.

The Edit ISAPI and CGI Restrictions Settings dialog opens.

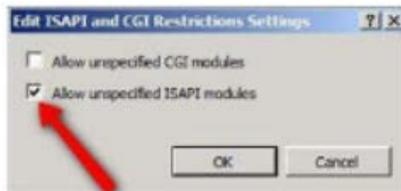


Figure 56.

4. Select **Allow unspecified ISAPI modules** and click OK.
5. Select the Server in the **Connections** pane.
6. Double-click **Handler Mappings** in the server Home window.

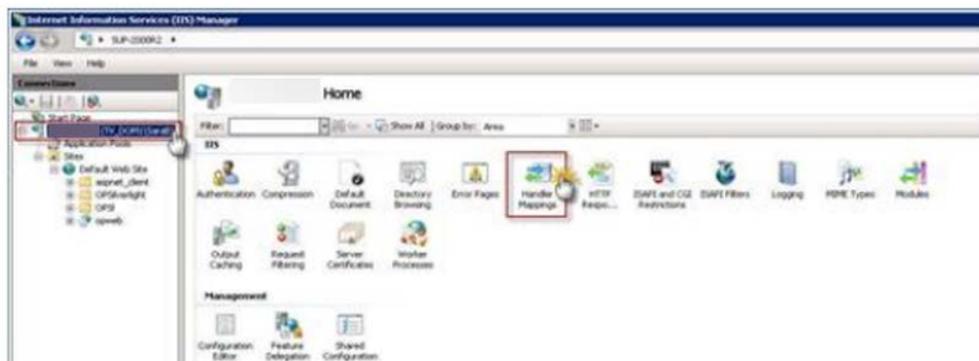


Figure 57.

The Handler Mappings window opens.

7. If not already enabled, right-click on **ISAPI-dll** in the **Disabled** section and select **Edit Feature Permissions**.

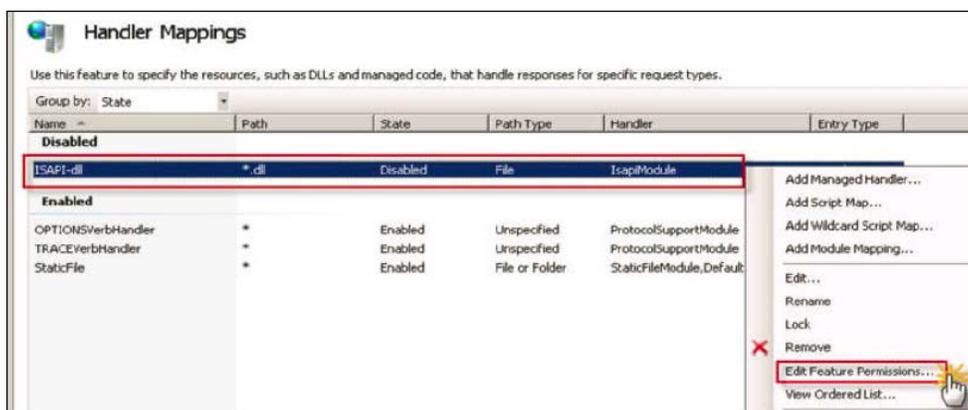


Figure 58.

The Edit Feature Permissions dialog opens.



Figure 59.

8. Select **Execute** and click OK.

The Handler Mappings window refreshes, displaying the **ISAPI-dll** in the **Enabled** section.

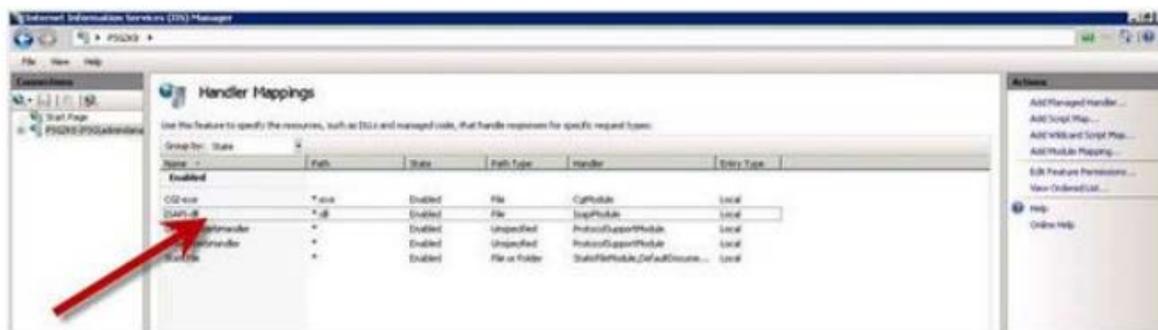


Figure 60.

When Allow All Unknown ISAPI Extensions is Restricted

Note: If you followed the directions in the section above, [Setting Up ISAPI Extensions and Handler Mappings in IIS](#), skip this section and continue with [Setting Up DCOM Permissions](#).

Using the configuration in this section, the Web Server administrator must [enable each chart chart.dll](#) web extension when new charts are published by the chart administrator. You will not be able to complete this section until an EChart has been published.

If you are unsure which setup to use, contact your Domain administrator to clarify which directions meet the requirements of your IT security policy.

The following procedure is intended for organizations that cannot set “All Unknown ISAPI Extensions to Allow.”

Configuring Each Chart.dll

1. In the **Connections** pane, select your server name and double-click **Handler Mappings**.

The Handler Mappings window opens.

2. If not already enabled, right-click **ISAPI-dll** in the **Disabled** section and select **Edit Feature Permissions**.

The Edit Feature Permissions dialog opens.

3. Select **Execute**.

The Handler Mappings window refreshes, displaying the **ISAPI-dll** in the **Enabled** column.

4. Select **ECharts** in the **Connections** pane to display the /ECharts Home window.
5. Double-click **Handler Mappings** in the **IIS** section.

The Handler Mappings window opens.

6. Click **Add Script Map** in the **Actions** panel on the right.



Figure 61.

The Add Script Map dialog opens.

7. Type the chart.dll in the **Request path** field.

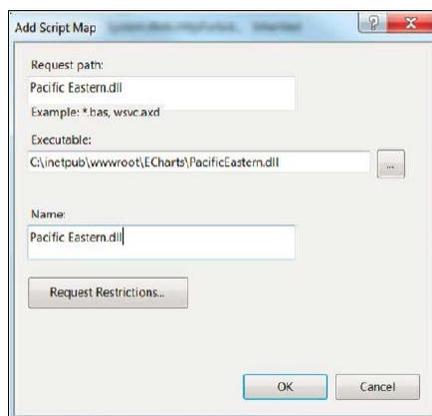


Figure 62.

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8. Type the physical path to the chart.dll in the **Executable** field.
9. Type the dll name in the **Name** field and click OK.

A security message prompts you to select **Yes** if you want to add the extension as **Allowed**.

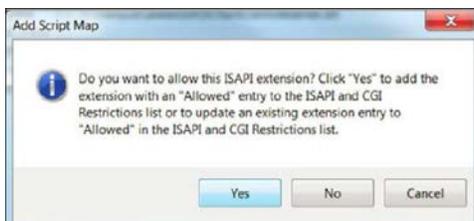


Figure 63.

Setting Up DCOM Permissions

1. Launch OrgPublisher on the server then close the application after it opens.
2. Click **Start** and:
 - If you are using a 2008 server, type **mmc** in the open field and click OK.
 - If you are using a 2008R2 server, type **mmc-32** in the open field and click OK.
3. In the resulting window, select **File** then **Add/Remove Snap-in**.

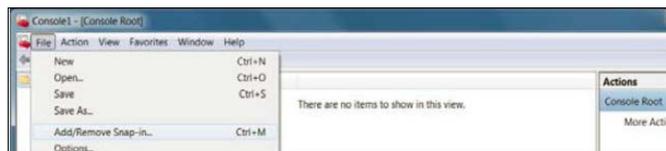


Figure 64.

4. Select **Component Services** from the **Available snap-ins** and click **Add**. Click **OK**.

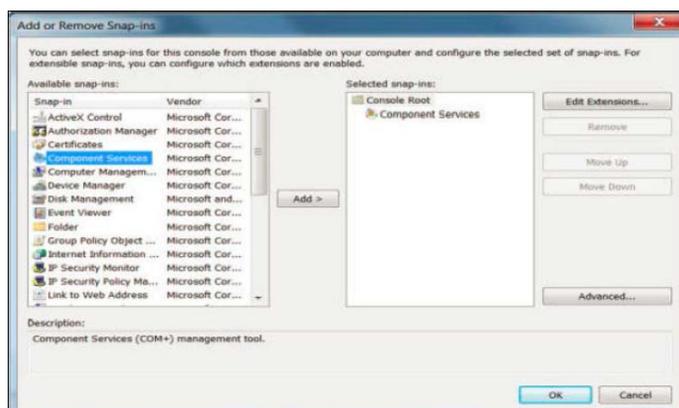


Figure 65.

Note: If you receive a CLSID warning message, click **Yes**.

The Component Services window opens.

5. Expand **Component Services**, **Computers**, and **My Computer** then select **DCOM Config**.
6. Right-click on OrgPublisher X Document and select **Properties**.

Note: If you are upgrading from a previous OrgPublisher version, it displays the number of that version. Set permissions on that DCOM entry.

The OrgPublisher X Document Properties dialog opens.

7. Select the **Security** tab.
8. Click **Edit** in the **Launch and Activation Permissions** section.
9. In the resulting dialog, click **Locations** and change the location to the server. Click OK.
10. Click **Advanced** in the Select Users or Groups dialog then **Find Now**.
11. Add the following groups and accounts:
 - Local **Administrators**
 - Local **Interactive**
 - Local **IUSR**
 - Local **IWAM**
 - Local **Network**
 - Local **Network Services**
 - Local **OPWeb_LG**
 - Local **System**

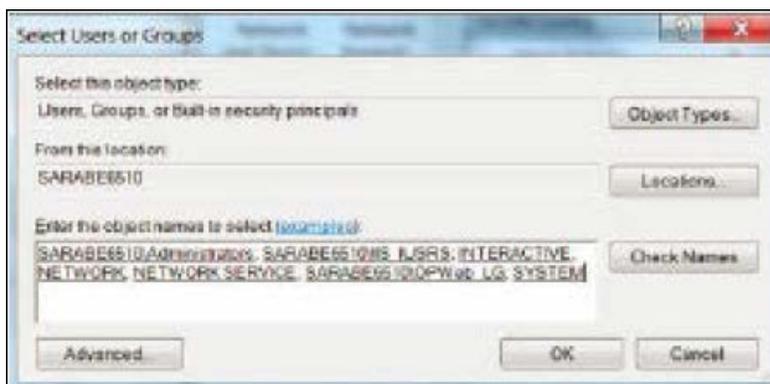


Figure 66.

Click OK to add the groups and accounts.

12. Enable the following **Launch and Activation Permissions**:

- Local Administrators – **Local Launch**
- Local Interactive – **Local Launch**
- Local IUSR – **Local Launch**
- Local IWAM – **Local Launch**
- Local Network – **Local Launch**
- Local Network Services – **Local Launch**
- Local OPWeb_LG – **All options**
- Local System – **Local Launch**

Click OK to save the changes and close the dialog.

13. Click **Add**, then click **Locations** and change the location to **Server**.

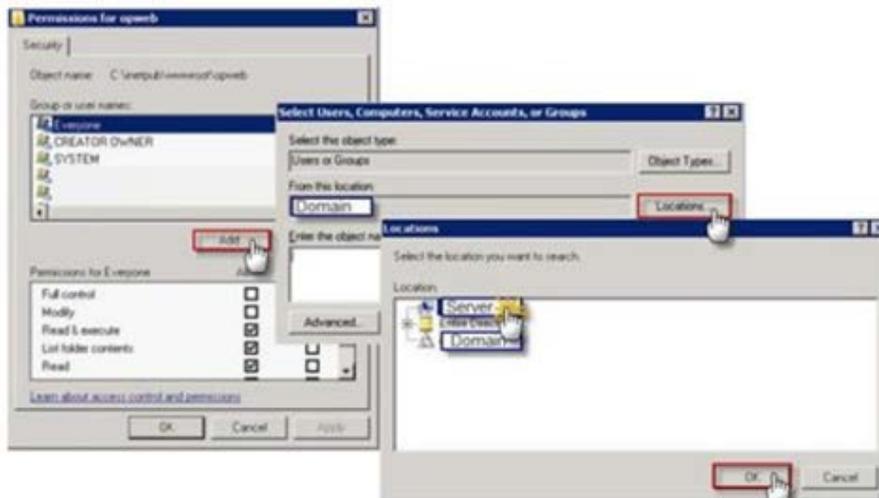


Figure 67.

Click OK.

14. Click **Advanced** in the Select Users or groups dialog, then click **Find Now**.

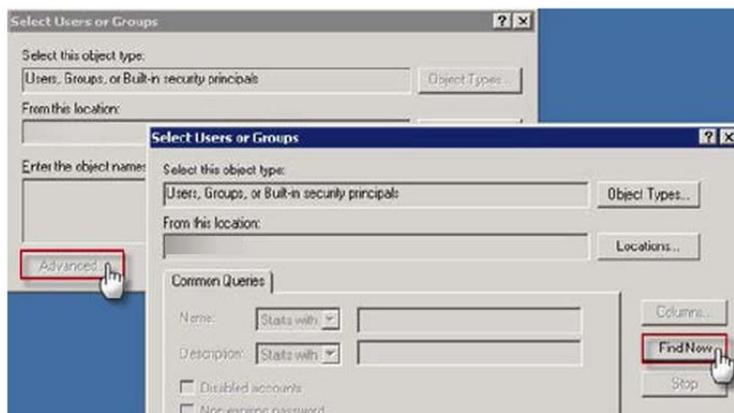


Figure 68.

15. Select the following groups and accounts from the search results:

- Local **Administrators**
- Local **Interactive**
- Local **IIS_IUSRS**
- Local **Network**
- Local **Network Services**
- Local **OPWeb_LG**
- Local **System**

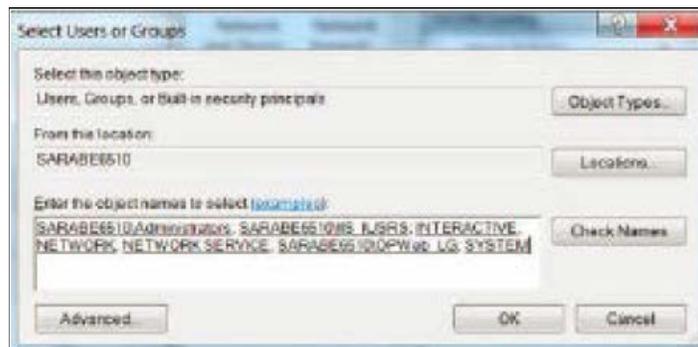


Figure 69.

Click OK to add the groups and accounts.

16. Enable the following **Launch and Activation Permissions**:

- Local Administrators – **Local Launch**
- Local Interactive – **Local Launch**
- Local IIS_IUSRS – **Local Launch**
- Local Network – **Local Launch**
- Local Network Services – **Local Launch**
- Local OPWeb_LG – **All options**
- Local System – **Local Launch**

Click OK to save the changes and close the dialog.

17. Click **Edit** in the **Access Permissions** section of the OrgPublisher X Document Properties dialog.

18. Click **Add** then click **Locations** and change the location to **Server**. Click OK.

19. In the Select Users or Groups dialog, click Advanced. In the resulting dialog, click Find Now.

20. Select the following groups from the search results:

- **Local Administrators**
- **Local Interactive**
- **Local IIS_IUSRS**
- **Local Network**
- **Local Network Services**
- **Local OPWeb_LG**
- **Local System**

Click OK to add the groups.

21. Enable the following **Access Permissions**:

- Local Administrators group – **Local Access**
- Local Interactive group – **Local Access**
- Local IIS_IUSRS group – **Local Access**
- Local Network group – **Local Access**
- Local Network Services group – **Local Access**
- Local OPWeb_LG group – **Both options**
- Local System group – **Local Access**

Click OK twice to close the dialogs.

Note: Your Windows 2012 EChart Server setup is complete. Proceed to [Testing Publishing of OrgPublisher Charts](#).

Testing Publishing of OrgPublisher ECharts

The following tests will help you determine if ECharts are configured correctly. If you can perform the tasks successfully, the OrgPublisher EChart Server installation has been successful.

If error messages display while testing, review:

- [NTFS permissions](#)
- [IIS configurations](#)
- [DCOM settings](#)
- [Troubleshooting tips](#)

If you still cannot successfully publish an EChart, contact [Product Support](#).

Prerequisites for Testing EChart Publishing

- We recommend that you test EChart publishing on a workstation. In addition, the server administrator may want to add themselves to the **OPWeb_LG** group for the purpose of publishing ECharts with the same rights as the chart administrators.
- Users must have the PluginX viewer, **orgpub.ocx**, in order to open an EChart rich client chart. Users are prompted to download the file when opening the chart for the first time.
- Users must be administrators on their machines in order to install the PluginX viewer.
- You can also refer to the [OrgPublisher Implementation Guide](#) on the Customer Care Center Web page for additional information on pluginx controls.

Test Publishing an EChart Rich Client Chart

1. Launch OrgPublisher and select **File**, then **New**.
2. In the New Chart Wizard, select **Organizational chart**.



Figure 70.

Click Next.

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3. Select **Empty chart** as the data source.



Figure 71.

Click Next.

4. Clear the **Launch the style wizard** check box.



Figure 72.

Click **Finish** to close the wizard and open the chart.

5. In the OrgPublisher toolbar, click and hold the Insert Box containing a Person button.

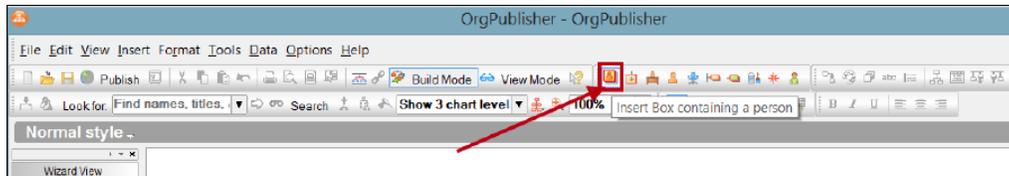


Figure 73.

6. Drag and drop the box in the chart white space.

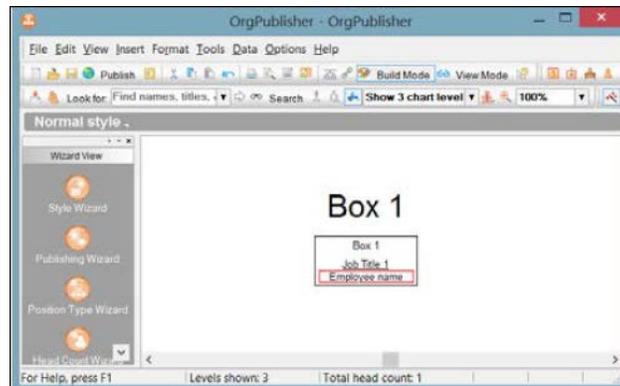


Figure 74.

7. Click Publish in the toolbar.

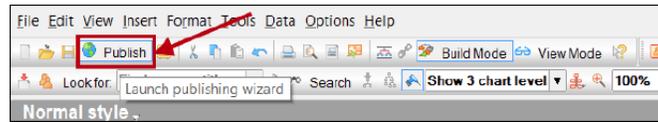


Figure 75.

The Publishing Wizard opens. Click Next.

8. Select **Advanced Mode**.

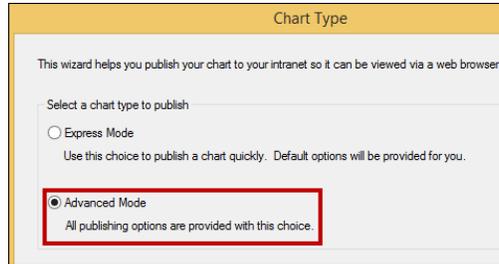


Figure 76.

Click Next and then click Next again.

9. Type the **Name** of the test chart.

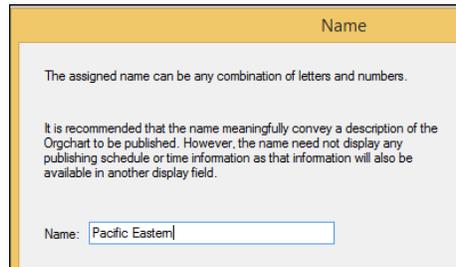


Figure 77.

Click Next.

10. Select **Interactive Org Chart**.

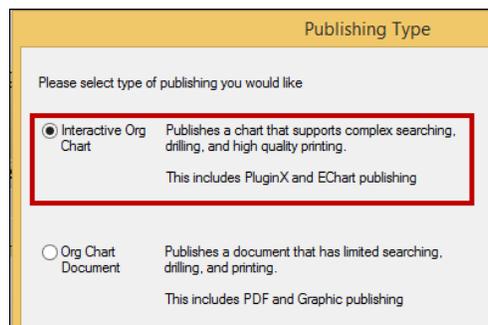


Figure 78.

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Click Next.

11. Select **EChart**.

The screenshot shows a dialog box titled "Interactive Type". It contains the instruction "Please select an interactive publishing type". There are four radio button options:

- PluginX: Publishes a chart that can be viewed using Microsoft Internet Explorer.
- EChart: Publishes an extremely large, secure, or HTML-only chart. Supports Microsoft Internet Explorer. Requires an ISAPI-compliant web server. (This option is highlighted with a red box)
- Cross Browser: Publishes the chart to be viewed across platforms.
- iPad: Publishes employee data to OrgPublisher Executive.

Figure 79.

Click Next.

12. Type the physical path to the ECharts folder on your server.

The screenshot shows a dialog box titled "Publish Location". It contains the instruction "Please select the file name and path for the published chart." Below this is a text input field labeled "Publish to location:" containing the path "\\Servername\inetpub\wwwroot\ECharts\Deleteme.htm". A "Browse" button is located to the right of the text box. The text box and its content are highlighted with a red box.

Figure 80.

Click Next.

13. Select **Rich client using PluginX**.

The screenshot shows a dialog box titled "Client Type". It contains the instruction "Please select which type of client you want the published chart to support". There is a sub-section titled "Client Type" with three radio button options:

- Rich client using PluginX: Requires a browser component but provides the richest OrgPublisher experience. (This option is highlighted with a red box)
- Thin client: Requires only a web browser and provides less features than PluginX charts.
- Both client options above

Figure 81.

Click Next.

14. Type the **URL** to the virtual path of the ECharts folder.

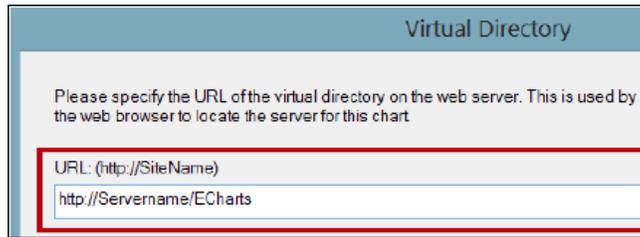


Figure 82.

15. Click Next through the rest of the wizard dialogs until you reach the Finish dialog.
16. Select **Publish Now**.

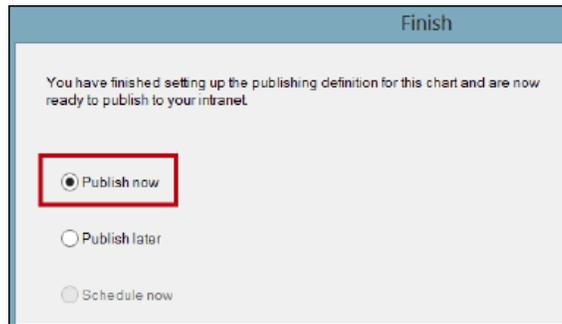


Figure 83.

Click **Finish**.

17. Type a chart name when prompted.



Figure 84.

Click OK.

18. Click the URL in the EChart Link Summary dialog.

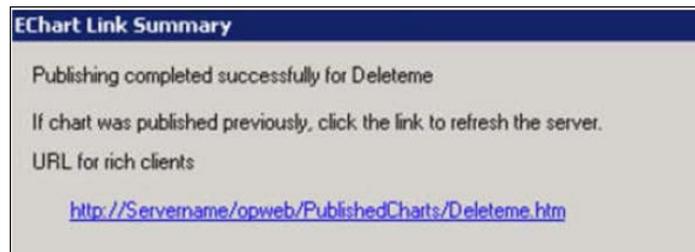


Figure 85.

Note: If you did not [enable all unknown ISAPI extensions](#) in the server setup, you must configure the chart.DLL before you can view the published chart.

2003 servers: [When Allow ISAPI Extensions is Restricted](#)

2008 and 2008R2 servers: [Configuring Each Chart.dll](#)

19. Install the PluginX viewer from the Web site, if prompted. The chart opens in the browser.

Additional EChart Setup Steps

Review the following list of items in order to provide your chart administrators what they need to begin publishing ECharts.

- Provide these links and rights to the chart administrators:
 - The server UNC path entered “publish to location” in the Publishing Wizard

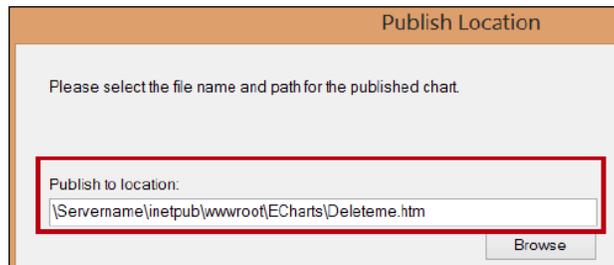


Figure 86.

- The ECharts virtual path for publishing

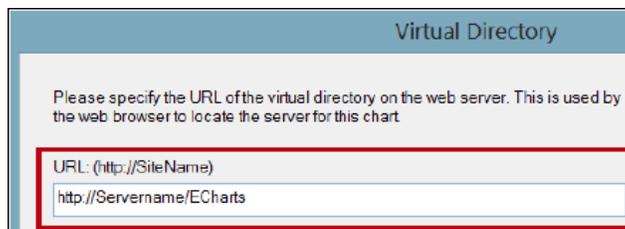


Figure 87.

- Chart administrators must be administrators on their own machines or they will need assistance downloading the PluginX component.

Troubleshooting Tips

- If you see an Internet Explorer window with a gray bar at the top but no chart, set a [MIME type](#) of .OCP on the ECharts folder.
- If an Internet Explorer window displays a red X in the upper-left corner to both administrators and end users, a problem occurred during installing and registering the Active X control.

Installing Active X controls requires administrative rights to the OC. Your IT group can request MSI scripts to assist in pushing out the plugins. Contact the [Product Support](#) team if you require a script.

- Understanding HTTP error messages and their associated status codes is important when you troubleshoot IIS. A few common errors on the client-side (4xx error) and Server-side (5xx error) are listed below.

Error Code	Definition
400	Bad Request: The server cannot service the request, usually because of an incorrect URL.
401	Unauthorized: The user's credentials were not accepted by the authorization process.
M403	Forbidden: The request could not be serviced for a number of reasons, even though the user was authenticated.
404	Not Found: The server cannot locate the requested file.
405	Method Not Allowed: The client incorrectly issued an HTTP GET request when an HTTP POST request should have been issued.
406	Not Acceptable: The requested file is not supported by the client.
407	Proxy Authentication Required: The client has to authenticate with the proxy server before its request can be serviced.
410	Gone: The server no longer has the requested file.
500	Internal Server Error: Indicates a typical server side error.
501	502 Not Implemented: The server does not support the HTTP method requested by the client.
502	Bad Gateway: An invalid response was received by the upstream server for which this server is a gateway.
503	Service Unavailable: The server does not support the service requested by the client.