

OrgPublisher EChart Server Setup Guide



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Introduction

Publisher

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.

- <u>Windows® Server 2003</u>
- <u>Windows® Server 2008</u>
- <u>Windows® Server 2008R2</u>
- 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.







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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

Select the toolbars and buttons ✓ Style selector ✓ Main toolbar ✓ Save as ✓ Cop*	Enable Toolbars you want enabled. ✓ Status bar ✓ Print ✓ Print preview*	You can select which buttons and toobars to enable in the published chart. The ferms noted with an asterisk (*) are not applicable in EChart thin client charts.
 ✓ Go to top* ✓ Search ✓ Toobar search* ✓ Zoom to point* ✓ Zoom factor* ✓ Microsoft PowerPoint* ✓ Chain of Command 	Set top of chart Deplay whole chart Diplay whole chart Duplay whole chart Duplayed levels Large About box button Reset Syle Chart Layout*	The Views toolbar provides the most flexibility to end users. Pluginx Copy affects right-cick menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled
✓ Wews toolbar ✓ Style view ✓ Tree view* ✓ List view/Search view	 ✓ Profile view ✓ Summary view ✓ 9 Box Matrix 	
Enable PluginX Copy* Enable opening the searc Not applicable for thin client	h results in Microsoft Excel*	Cancel Help

Figure 2.

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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

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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 Hard	ware Requirements	for Thin Clie	nt	
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

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Configuring Groups

Publisher

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.

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



Figure 6.

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Windows Server 2003 EChart Setup

Creating the ECharts Folder and Setting NTFS Permissions

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





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

3	Name -		Size	Туре
Picture Tasks 🔶	aspnet_client			File Folder
View as a slide show	OPSilver Egpl	n ore ch with Microsoft Forefront	Endpoint F	rotection 2010
Rename this folder	Spa	ing and Security		
Move this folder	Seg	1 TO		
Copy this folder	Cut			
Publish this folder to the Web	Sob	<i>i</i>		
Share this folder	Crei	te Shortcut		
E-mail this folder's files	Dele	te		
X Delete this folder	Ren	ame		
	Ptop	erties		



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.

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The Locations dialog opens.

the second se	the state of the s	
IIS_WPG (SI	UP-2003VIS_WPG)	
SYSTEM	st Account (SUIP-2003/USH_SUP-2003)	
Users (SUP-	2003/Users)	
	Add Bemove	
aissions for	elect Users, Computers 🖤 roups 🔹 🔋	×
ull Control	Select this object type:	
lodity	Users. Groups, or Built-in security principals Object Types	1
Read & Exec	From this location	-
List Folder Co	timevision.com	
fead		m
manial Dawn	Entre Locations	-
special pern k.Advanced	Select the location you want to search.	
	Location	_

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)

Select this object type:		
Users, Groups, or Built in security principals		Object Types
from this location:		
SUP-2003		Locations
(nter the object names to select (examples)		
SUP-2003Administrators - NETWORK SERVICE - SUP-2003/OPWeb_LG - SUP-2003/UsersI		Qheck Names
Advanced	OK:	Cancel



Click OK to add the groups.

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- 9. Enable the following NTFS permissions:
 - Users group
 - Administrators group
 - OPWeb_LG group
 - Network Service group
 - IIS_WPG

Read and Execute Full Control Modify Read and Execute 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**.

Internet Information Service	es	Description		State	Status
SUP-2003 (local compute Application Pools	er)	DefaultAppPool		Running	
DefaultAppPo	New		Application P	ool	
OP9	All Task	ys 🕨	Application P	ool (from file)	

Figure 12.

The Add New Application Pool dialog opens.

3. Type OrgPublisher in the Application pool ID field.

pplication pool ID:	OrgPublisher	
Application pool set	tings	
G Use default set	ttings for new application pool	
C Use existing as	oplication pool as template	
Application page	DefastAnnPool	*

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.

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



Figure 15.

The Virtual Directory Creation Wizard opens. Click Next.





The Virtual Directory Alias dialog opens.

rtual Directory Creation Wizar	d
Virtual Directory Alias You must give the virtual director	ory a short name, or alias, for quick reference.
Type the alias you want to use same naming conventions that	to gain access to this Web vitual directory. Use the you would for naming a directory.
Alias:	
Echarts	

Figure 17.

4. Type Echarts in the Alias field and click Next.

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The Web Site Content Directory dialog opens.



Figure 18.

 Type or Browse to the path, C:\inetpub\wwwroot\Echarts and click Next. The Access Permissions dialog opens.

Access Permissions What access permissions do you want to set for this virtual directory? Allow the following.	Virtual Directory Creation Wizard	X
Allow the following P Binad Plun goopt (such as ASP) P Execute (such as ISAPI applications or CGI) P Lytes P Equive Click Next to complete the wizard.	Access Permissions What access permissions do you want to set for this virtual directory?	5
	Allow the following.	
Film polpts (such as ASP) Evecute (such as ISAPI applications or CGI) Write Bigwree Click. Next to complete the wizard.	₽ Beat	
Evecute (such as ISAPI applications or CGI) Write Bigwise Click. Next to complete the wizard.	Finn peripts (such as ASP)	
₩/#e Bigwee Click Next to complete the wizard.	Execute (such as ISAPI applications or CGI)	
Click Next to complete the wizard.	T Wite	
Click Next to complete the wizard.	I ^{III} Bigwise	
	Click Next to complete the wizard.	
	< <u>Back</u> <u>Next</u> >	Cancel

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.

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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** dropdown 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.

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The MIME Types dialog opens.

Contraction of the second s		_		YIXI			
Virtual Directory HTTP Headers	Documents Custom Errors	Direc	tory Security ASP.NET	MINE Types			
Web site content explored				Registered MIME	types (He e	xtensions):	-
C Luppe mmediately	forest .	a l					New
C Expre on Wedness	av. October 26,2011 *	- - - - -	00:00 AM -4				- tot-
C. A. LAWRENCE AND	-	1 - 1					SECONA
X-Powered-By: ASP.NET			Add	Extension:	-00	2	
X-Powered-By: ASP.NET	users to identify what type provides.	e of _Edt	Add Edt Bernover	MINE Type Extension: MINE type:	Poor Ode) Ication/orgput	Jisher]

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 <u>When Allow All Unknown ISAPI Extensions is Restricted</u> 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 <u>enable each chart .DLL</u> 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.

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OrgPublisher

● Internet Information Services (IIS) ● Ele Action Yew Window Help ← → 10 同 ② 図 図 11	Manager			
Internet Information Services ■ ISUP-2003 (local computer) ■ Application Pools ■ Application Pools ■ Application Pools ■ Application Pools ■ Application Pools ■ Application Pools	Web Service Extensio	Right Click b Service Extension Dirknown CGI Extensions	Status Prohibited Prohibited	
B CPSilverlight B CPSil	Prohibit Properties	Active Server Pages ASP.NET v2.0.50727 ASP.NET v4.0.30319 CommTextFix	Allowed Allowed Allowed Allowed	Allow Prohibit Refresh Helo
Gradit Web Ste Gradit Web Ste Gradit Web Ste Gradit Ste Grad	A LIS Manager If you allow A Do you want	Il Unknown ISAPI Extensions, any ISAPI extension to allow All Unknown ISAPI Extensions?	can run on your	Web server. This

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, <u>Enable All Unknown</u> <u>ISAPI Extensions</u>, skip this section and continue with <u>Setting Up DCOM</u> <u>Permissions</u>.

Using the configuration in this section, the Web Server administrator must <u>enable each chart .DLL</u> 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 Extentions** to **Allow**. When a new chart is published, a .DLL file is produced. This is visible in the ECharts folder (**C:\inetpub\wwwroot\ECharts**).

C:\Inetpub\wwwroot\ECharts					- 0 >
Ele Edit View Favorites Tools	: Help				1
🔾 Back 🔹 🕥 🔹 🍠 🖉 Search	🔁 Folders 🛛 🛄 🔹				
Address 🛅 C:\Inetpub\www.root\EChi	arts				🕶 🛃 Go
	Name A	Size	Туре	Date Modified	Attributes
File and Folder Tasks 🛛 🛸	PacificEastern.bat	1 KB	Windows Batch File	10/16/2011 9:20 PM	A
Chi Danama Mia Sha	PacificEastern.dll	8,408 KB	Application Extension	8/25/2011 4:44 PM	A
Rename this file	PacificEastern.htm	2 KB	HTML Document	10/16/2011 9:20 PM	A
Move this file	PacificEastern. is	1 KB	JScript Script File	10/16/2011 9:20 PM	A
Copy this file	PacificEastern.ocp	309 KB	OrgPublisher 10 Do	10/16/2011 9:19 PM	A
Publish this file to the Web	PACIFICEASTERN.OCS	517 KB	OCS File	10/16/2011 9:20 PM	A
E-mail this file					



- 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.

stension name:			
PacificEastern.dll			
equired files:			
C:\inetpub\www.root\ECharts\PacificEastern.dll		Add	
			Berno

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.

tun		2
	Type the name of a program, folde Internet resource, and Windows w	r, document, or Il open it for you.
Open:	dcomcnfg	<u>.</u>

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.

ieneral	Location	Security	Endpoints	Identity		
Laur	nch and Ac	tivation P	ermissions			
0	Use Defau	lt				
0	Customize				Edit	1



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



Figure 30.

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- 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**.

Users, Groups, or Built-	in security principals Object Types	
From this location:		
	Select Users or Groups	
Enter the object name:	Select this object type.	
	Users, Groups, or Built-In security principals	Object Types
	From this location	
		Locations
Advarced Pr	Common Queries	
	flarer State with 💌	Edition
	Description State with *	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

Users, Groups, or Built in security principals		Object Types
rom this location:		
SUP-2003		Locations
inter the object names to select (examples)		
Inter the object names to select (scanddas) SUP-2007Administrators: NETWORK SERVICE : SUP-2007ADPWeb_LG: SUP-2002AUsers)		Qheck Names



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.

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13. Click Edit under Access Permissions.

General	Location	Security	Endpoints	Identity	
Lau	inch and A	ctivation P	ermissions		
Ø	Use Defa	ult			
0	Customize	•			Edit
Acc	cess Perm Use Defa	ssions ult			
0	Customize				Edit

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 I WAM
 - 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 <u>Testing EChart Publishing</u>.

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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**.

East I state a sparse of			
IE Enhanced Security Configuration (ESC):	Off for Administrators Off for Users		
Roles Summary		Roles Summary Help	
A Roles: 2 of 17 instaled		i Go to 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

Add Roles Wizard	X
Before You Begin	
Before You Begin	This wizard helps you install roles on this server. You determine which roles to install based on the tasks you wont this server to perform, such as shorton dociments or bodting a Web site.
Server Roles Confirmation	Before you continue, verify that:
Progress	The Administrator account has a strong password Metwork extense, such as statis 10 addresses are configured
Results	The latest security updates from Windows Update are installed. If you have to complete any of the preceding steps, cancel the wizard, complete the steps, and then run the wizard again.

Figure 35.

If all points are met, click Next.

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

Server Roles	Roles:	Description:
Web Services Role Services Confirmation Progress Recults	Active Directory Certificate Services Active Directory Domain Services Active Directory Upmain Services Active Directory Rights Management Services Active Directory Rights Management Services Application Server DRS Server Plat Services Plat Services Plat Services Plat Services Plat Services Terminal Services UDD Services Windows DipateFoart Services Windows ShareFoart Services	With Secure (III) provides a reliable, managentile, and scalable Web application infrastructure.

Figure 36.

Click Next.

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



Figure 37.

Click Next.

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6. Click Install in the Confirm Installation Selections dialog.



Figure 38.

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

na Neu Boger.	The following roles, role services, or features we	re installed successfully:	
er kales Senver (IIS) Senver es Innaton Prese As	Web Server (IIS) The following role services were installeds web server Common HTP Produres Static Content Defail: Document Directory Browsing HTP Errors Application Development ISAPI Extensions ISAPI Extensions	Installation succeeded	
	Security Windows Authentication Nexpost, filture ing Performance Static Content: Compression Management: Tools		

Figure 39.

Click Close.

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



Figure 40.

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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.

C:\Inetpub\www.root					- 0 >
Eile Edit View Favorites I	[oolis Help				
3 Back 🔹 🕤 🕘 💋 Searc	ch 🌔 Folders 🛛 🖽 🕶				
Address C:\Inetpub\www.root					• 🔁 Go
-	Name -	Size	Туре	Date Modified	Attributes
Dicture Tacks	aspnet_client		File Folder	4/15/2011 3:16 AM	
PILLULE LOSKS	👇 🗀 OPSilverlight		File Folder	9/12/2011 2:30 PM	
View as a slide show	Copweb101		File Folder	9/29/2011 9:56 AM	
Order prints online	😰 isstart.htm	2 KB	HTML Document	2/21/2003 6:48 PM	A
Print pictures	pagerror.glf	3 KB	GIF Image	2/21/2003 6:48 PM	A
	ECharts		File Folder	10/16/2011 3:46 PM	



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





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.

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- 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**.





The Add Application Pool dialog opens.

Name:	
OrgPublisher	
NET Framework version:	
NET Framework v2.0.50727	-
Managed pipeline mode:	
Integrated 💌	
Start application pool immediate	lu.
Start application poor inniediate	**



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 <u>Creating the Virtual Directory</u> section.

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

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

Ξ	(General)		
	.NET Framework Version	v2.0	
	Enable 32-Bit Applications	True	
	Managed Pipeline Mode	Integrated	
	Name	DefaultAppPool	
	Queue Length	1000	
	Start Automatically	True	



Creating the Virtual Directory in IIS

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



Figure 46.

The Add Virtual Directory dialog opens.

d Vrtual Directory	181 X
Site name: Default Web Site	
reak 7	
Alles: ECtans	
Example: images	
Physical path	
C:\inetpub\www.cot\ECharts	
Pas-through authentication	(Derived
Connect as Test Settings	
CK	Cancel



3. Type ECharts in the Alias field.

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- 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.





The Add Application dialog opens.

Add Application	A	9 22
Site name: Default Web 5 Path: /	lite	
Allas: ECharts	Application pool: DefaultAppPool	Select.
Example: sales Physical path:	Select Application Pool	2 ×
Cl\inetpub\wwwroot\EChart Pass-through authentication	Application pool: OrgPublisher	•
Connect as Test	Properties: Net Framework Version: 2.0	
	Pipeline mode: Integrated	Cancel

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.

ler	-	-	-	autor i	(Marilley 7	manhage 1	
Default Web	Site + ECha	arts 🕨					
Filter:	harts Ho	me Al Go 🗸 📿	Show All	Group by:	Area	•	
Providers	Session State	SMTP E-mail					•
ASP	Authentica	CGI	Compressi.	. Defaul	t Director	y lications	10
	Default Web Default Web /ECC Filter: Drouidere IIS ASP	Default Web Site ECha /ECharts Ho Filter: Orouideax State IIS ASP Authentica. Coc	per ► Default Web Site ► ECharts ► Filter: • @ Go @ Filter: • @ Go @ Drouider: Secion SMTD State E-mail IIS ASP Authentica CGI Configure au	per ► Default Web Site ► ECharts ► Filter: • @ Go • Show All C Filter: • @ Go • Show All C Provider: Saction SMT0 State E-mail IIS ASP Authentical CGI Compressi. Configure authentication s	Provider: Saccion SMTP State E-mail SASP Configure authentication settings for	Per Default Web Site ECharts	b Default Web Site ECharts Contrast Home Filter: Contrast Book All Group by: Area Filter: State E-mail IS State E-mail IS CGI Compressi Default Directory Configure authentication settings for sites and applications

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.

MIME ise this feature to a tatic files by the W Group by: No Gro	Types manage the list of file name e eb server.	xtensions	Actions Add Add Add Add Add.MIME Type T
Extension *	MIME Type	Entry 1	File name extension:
.323	text/h323	Inherite	locp.
.sef	application/octet-st	Inherit	MINE hope
.aca	application/octet-st	Inherit	nane type:
.accdb	application/msaccess	Inherite	appacacion/orgpublishen
-accde	application/msaccess	Inherite	
.accdt	application/msaccess	Inherite	City Court
.acx	application/internet	Inherite	Carken
.afm	application/octet-st	Inherita	
	application/postscript	Inherite	ed .

Figure 53.

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

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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 <u>When Allow ALL Unknown ISAPI Extensions is Restricted</u> 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 <u>enable each chart .DLL</u> 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.





The ISAPI and CGI Restrictions window opens.

TEADT	and CGT Re	strictions	Actions
ISAPI	and CGI Re	strictions	Add
ise this feature to s	pecify the ISAPI ar	d CGI extensions that can run on the Web server.	Edit Englure Settings
Group by: No Gro	uping -		0
Description +	Restriction	Path	Online Help
WebAdmin Server WebDAV	Allowed	C: l/netpub/www.root/ppweb/RemoteServer.dll C: Windows/pystem32/jnetorv/webdav.dl	

Figure 55.

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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.

File View Help											
- 1110.19.	9		Home								
Vi Satilas	FRe:	-		- 9 mm Al] (ing br. Area	8 22 -					
JANKEN FUE	115		1								
Contract Web Star	Atterticitor		Culat.	Deatory Booking	Enter Fages	Nucleo Contra	EAFLand Cill Associations	3 Davi Films	Legging	PER TON	The second
R (F greet)	o david Caching	8 Repet Flore	Server Certificant	Noter Process							
	Managora	-									
	Corligation Editor		Saved Configuration								

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**.

Group by: State	*					
Name 🗢	Path	State	Path Type	Handler		Entry Type
Disabled						
ISAPI-di	•.dl	Disabled	File	IsapiModule		Add Managed Handler
Enabled					1	Add Script Map
OPTIONSVerbHandler		Enabled	Unspecified	ProtocolSupportModule		Add Wildcard Script Map
TRACEVerbHandler	•	Enabled	Unspecified	ProtocolSupportModule		Add Module Mapping
StaticFile	•	Enabled	File or Folder	StaticFileModule,Default		Edit
						Rename
						Lock
					×	Remove
						Edit Feature Permissions
						View Ordered List



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The Edit Feature Permissions dialog opens.

Reinternet Information Services (1)	(5) Markager										
00 9							1				
File Vew Heb											
Connections Q, • [] 1 [Q, - V] Star Page B Q (PV_DOM:)Ser all Q Application Pools	Hendler Mappings Use bis feature to specify the resources, such as DUS and narraged code, that handle responses for specific request types. Searchin: Take										
E & Stes	Nate -	Path	2.44	Path Type	Hander	Entry Type	i,				
E Cefault Web Ste	Enabled						1				
8 CPSkvelght 8 CPSkvelght 8 CPS 8 Proveb	OFTICAEVestatunder TEACEVestatunder Statuefile	:	Enabled Enabled Enabled	Unspeched Unspeched File or Folder	Protocol/upportPludule Protocol/upportPludule StatisfileModule.DefaultDocume	Local Local - Local					
	ISM'T-0	1.4	Enabled	-	toutholds Talad	Local					
				Pernessizes: IP Read IP Script IP Execute	04						

Figure 59.

8. Select Execute and click OK.

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

Enternet beformalism ferret	kers (DN) Hamaget						
GG 13+19001	•						(a) = \$210 ·
10 . Ten . Tel:							
Connections No.+ (ii) (* 19). No. 2017 Aug. No. 2017 Property Accessions	Handler Ma	Active Additionaged Intellige Add Social Time					
- 100	Group by: Date	- April -		a land	1000 Contraction of the second		Astmula Repre
	Finalityd	Ine	Tate	Path Tupe	nucler	(pwy Tige	Edit Produce Participan View Orders Edit
	Constanting of the second		Endled Endled Endled Endled	File Dis Unspectived Unspectived File on Folder	Canada JugPoda PotosiDagarthola PotosiDagarthola SoloffeRida (seladicusa	Local Local Local Local	O ma Galaring
/							



When Allow All Unknown ISAPI Extensions is Restricted

Note: If you followed the directions in the section above, <u>Setting Up ISAPI</u> <u>Extensions and Handler Mappings in IIS</u>, skip this section and continue with <u>Setting Up DCOM Permissions</u>.

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.

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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.

Request path:		
Pacific Eastern.dll		
Example: *.bas, wsvc.axd		
Executable:		
C:\inetpub\wwwroot\ECharts\Pacific	Eastern.dll	
Name		
Pacific Eastern.dll		
Request Restrictions		

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.

🔓 C (onsole1 + (Console Root)			
-	le Action View Favorites W	indow Help		
de.	New	Ctrl+N		
	Open	Ctri+O		Actions
	Save	Ctri+S		Controle Poot
	Save As_		There are no items to show in this view.	CONDUCT NOOL
	Add/Remove Snap-in	Ctri+M		More Acti
	Options_			



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

valiable snap-ins:				Selected snap-ins:	10
Snap-in	Vendor			Console Root	Edit Extensions
ActiveX Control	Microsoft Cor			Component Services	E martine
Authorization Manager	Microsoft Cor				Bernove
Certificates	Microsoft Cor	-			
Recomponent Services	Microsoft Cor				Move Up
Computer Managem	Microsoft Cor				
Device Manager	Microsoft Cor		1		Morve: Down
Disk Management	Microsoft and		Add >		
Event Viewer	Microsoft Cor				
Folder	Microsoft Cor				
Group Policy Object	Microsoft Cor				
Internet Information	Microsoft Cor				
B IP Security Monitor	Microsoft Cor				
IP Security Policy Ma	Microsoft Cor				-
Link to Web Address	Microsoft Cor	+			Advanced
scription:					

Figure 65.

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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

elect Users of Groups	In fait and
Select this object type:	
Users, Groups, or Built-In security principals	Object Types
From the location	
SARABEREID	Lacations.
Enter the object names to select (examples)	
SARABESSID.Administration, SARABESSIDIAS, MSRS, INTERACTIVE,	Chack Names
DELITIVITY CREATERS SECTION SECTION AND CONTRACTOR	
Advanced OK	Cancel

Figure 66.

Click OK to add the groups and accounts.

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- 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.

E veryone	Select Osers, Computers, Service Accounts	n, er Genapa 🖬 🖬
CREATOR OWNER	Select the object type: Users or Groups	Object Types
	From this location	
	Constant Locations	
	Seleci the location you war	et la seach.
ul control	Location	
fodily lead L mercule	Advanced.	
	Domained Domained	
ant folder contents		

Figure 67.

Click OK.

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

Select Users or Group		? ×
Select this object type: Users, Groups, or Built-	n security principals Object	tījose
From this location:		
	Select Users or Groups	? ×
Enter the object name:	Select this object type: Users, Groups, or Built-in security principals From this location: Common Queries Neme: Stats with y Description: Stats with y Disabled accounts In Non-expering password	Object Types

Figure 68.

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- 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

Lisers, Groups, or Built in security princip	ania .	Object Types.
From this location		
SARABER510		Lacations.
Enter the object names to select (examp	tick	
SARABEESID.Administrators. SARABE NETWORK, NETWORK SERVICE, SA	6510/IS ILIGRS: INTERACTIVE. RASESS IDIOPWICE LG: SYSTEM	Chack Names

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.

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- 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 <u>Testing Publishing of OrgPublisher Charts</u>.

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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
- <u>Troubleshooting tips</u>

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 <u>OrgPublisher Implementation Guide</u> 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.

Organizational charts represent reporting relationships in your organization. Select this option to create a chart using your own data mapping and formatting.	CFO Raymond Jessup	
	Finance Controler A Open Position	Finance Controller B Greta Johannson

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.

8	OrgPublisher - OrgPublisher
<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>I</u> nser	t Fo <u>r</u> mat <u>T</u> ools <u>D</u> ata <u>O</u> ptions <u>H</u> elp
🛛 📥 Η 🎱 Publish	🗉 X 🗈 🗈 🗠 🗟 💭 💷 🛣 🖋 😕 Build Mode 😂 View Mode 🧐 🚺 🍓 📥 🛔 🍁 🗠 🗣 👫 🛔 😳 🧐 🗇 🚥 🖽 品 🕮 琴 琴
📩 🖄 Look for. Find i	names, titles, 🔻 🗘 🕫 Search 🏌 🛝 🔦 Show 3 chart level 🔻 🌲 🕈 100% Insert Box containing a person 🖡 🗄 B I 🛛 🗉 🚍
Normal style 🗸	
Wizard View	



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



Figure 74.

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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.





Click Next.

10. Select Interactive Org Chart.



Figure 78.

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Click Next.

11. Select EChart.



Figure 79.

Click Next.

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



Figure 80.

Click Next.

13. Select Rich client using PluginX.



Figure 81.

Click Next.

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





- 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.

incer oremore ridinic	
lease enter a name for	this chart
Deleteme	
·	
Ok	Cancel

Figure 84.

Click OK.

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



Figure 85.

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Note: If you did not <u>enable all unknown ISAPI extensions</u> 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

Publish Lo	ocation
Please select the file name and path for the published chart.	
Publish to location:	
	Browse

Figure 86.

The ECharts virtual path for publishing





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

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Troubleshooting Tips

Publisher

- If you see an Internet Explorer window with a gray bar at the top but no chart, set a <u>MIME type</u> 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 <u>Product Support</u> 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.

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