OrgPublisher File Layout

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Introduction

OrgPublisher provides Prebuilt Report file layouts, as well as a standard file layout if you want to build your chart using your own custom fields and data sequencing. Prebuilt Report documentation can be found on the [Support](#) page, as well as the Customer Community site.

This document only addresses the file layout that allows you to use your own custom fields and layout, as long as you keep within the data guidelines.

Input File Layout

The Input File Layout defines the order of columns in the comma-separated text file that OrgPublisher opens to generate your org chart. It also specifies the order of fields to send to OrgPublisher when you choose to generate org charts automatically using the Component Object Model (COM) interface.

Each record in an OrgPublisher input file typically represents a manager, an employee, an open position, an assistant, a partner, or a contractor in the organizational chart.

In addition, an input record can represent a normal box, an assistant box, or a partner box within the hierarchy of boxes in the chart.

OrgPublisher supports formula fields by using the Microsoft Windows Script Host to process VBScript. Formula fields contain a VBScript function that references values in custom fields.

Input File Layout Description and Order

The first two fields noted in the layout table are required to build a reporting structure. These fields can include information from your HR database such as a supervisor ID and an employee ID, supervisor position code and an employee position code, or a supervisory department and reporting department.

Each person or position in an org chart is represented by only one record in the Input File. However, a person may occupy more than one position in the chart and may appear in multiple input records.

After populating fields in the Input File with your custom data, open the Custom Field Properties dialog and select where these fields should be displayed in your chart.

Field Number	Excel Column	Required	Field Name	Description
1	A	Yes	Parent Box ID	The parent box ID can be any string of numbers and/or characters that represent the report to box of this record. This usually contains the **Reports_to_ID** for the employee. The data type for fields 1 and 2 should match, for instance, if field 1 is numeric, then field 2 should be numeric. If field 1 is alpha, then field 2 should be alpha, etc. The parent box ID is not displayed in the chart. Only the top person in a chart will have an empty parent box ID.

Field Number	Excel Column	Required	Field Name	Description
2	B	Yes	Box ID	The box ID can be any string of numbers and/or characters that uniquely represent a box within the chart. This ID can be duplicated for several records when multiple people are located in the same box. The box ID is not displayed in the chart. The data type for fields 1 and 2 should match, for instance, if field 1 is numeric, then field 2 should be numeric. If field 1 is alpha, then field 2 should be alpha, etc. You can add a unique box ID, typically an employee ID from your database. You can also use a position code if you use position management. Where the employee is placed in the chart depends on the Auto Build option, the position type priority, and the Sort option.
3	C	No	Box Title	The box title can be any string of numbers and/or characters and is shown as the top text entry in the org chart box that it describes. This can be a cost center or full department name. The box title should be unique to the box ID that is also contained in this record. The same box title is displayed in every record that contains this box ID.
4	D	No	Record Type	If left blank this field defaults to E for Employee. Record type defines the position type of each person in your organization. OrgPublisher provides several predefined record types. You can also create custom record types to define other positions in your organization. Record types for custom position types using more than one character should use brackets, for example <MT>. **M** = Manager **E** = Employee **A** = Assistant **C** = Contractor **I** = Indirect report **PR** = Partner **<SF>** = Staff Function **<SC>** = Succession Candidate **B** = Box You cannot insert a person in a B record type. It is typically used to display org units or departments only.
5	E	No	Person ID	The person ID field can contain any string of numbers and/or characters to represent the ID or unique identifier for a person, such as employee ID. This field is used to add a person to a group and to identify a person in order to add a multi-relationship icon. The field is displayed and searchable by end users. Do not store sensitive information in this field.

Field Number	Excel Column	Required	Field Name	Description
				Example: *"1","2","ABC Department","M","9-999999","Smith","Rose",,"JOB001","Supervisor"*
6	F	Yes	Last Name	An optional field, the last name field represents the last, or family, name of the person a record represents. If left blank, OrgPublisher inserts an open position. **Example:** *"1","2","ABC Department","M","9-99999999",**"Smith"**,"Rose",,"JOB00"1,"Supervisor"*
7	G	No	First Name	The first name field represents the first name of the person that a record represents. **Example:** *"1","2","ABC Department","M","9-99999999","Smith",**"Rose"**,,"JOB001","Supervisor"*
8	H	No	Middle Name	The middle name field represents the middle name of the person that a record represents. **Example:** *"1","2","ABC Department","M","9-99999999","Smith","Rose",**"L"**,JOB001,"Supervisor"*
9	I	No	Job ID	The job ID can be any string of numbers and/or characters that uniquely represent a job title or position title within the chart. If records are combined into one box, job titles are defaulted to list in ascending sequence by job ID and are sorted within each position type. The job ID is not displayed in the chart. This field is used in Auto Build.
10	J	No	Job Title	The job title can be any string of numbers, there should be no special characters in field names. The job title is shown above the individual name within a box. The priority of the position type determines the order of job titles of different position types appearing within a box. You can override the priority by assigning the sequence number in field 13 of the comma-delimited text file. In the following example, each record that contains job ID "JOB001" also contains the job title "Supervisor." **Example:** *"1","2","ABC Department","M",,"Smith",'A",,"JOB001",**"Supervisor"*** *"1","3","ABC Department","M",,"Turner","B",,"JOB001",**"Supervisor"***

Field Number	Excel Column	Required	Field Name	Description
				*"1","4","ABC Department","M",,"Brown","K",,"JOB001","**Super visor**"*
11	K	No	Reserved	Field 11 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data, and to ensure compatibility with future versions of OrgPublisher, leave this field blank.
12	L	No	Box Sequence Number	Field 12 is the box sequence number and accepts only numeric (integer only) characters. It can be used, but is not required, to override the default positioning of the boxes. By default, boxes are positioned from left to right (level by level) in your chart alphabetically by box ID. This field is used when you select the Sort by box ID option of the OrgPublisher Sort feature.
13	M	No	Job Sequence Number	The job sequence number accepts only numeric (integer only) characters. It can be used, but is not required, to override the default positioning of the job title. By default, job IDs are used for sorting multiple jobs within a single box, such as people in the same box as their manager.
14	N	No	Position Sequence Number	The position sequence number can be used, but is not required, to override the default positioning of the employee name, and must be numeric (integer only) characters. By default, multiple employee names are sorted alphabetically within a single box.
15	O	No	Photo	The file names of the photos in your chart are stored in the photo field. Add photos with the Photo Wizard so that you can specify a common path for all of your photo files. If photos are stored in different areas you must put the full path name in this field.
16	P	No	Reserved	Fields 16 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data and to ensure compatibility with future versions of OrgPublisher, leave this field blank.
17	Q	No	Position ID	OrgPublisher looks for Position ID in field 17. Position IDs are used for tracking position movement in OrgHistory when comparing charts and tracking what positions have been pinned in the side-by-side Profile View. It's preferable to have position IDs in the source data if you want to tie changes back to the source system. **Note: If you choose not to use this field for Position ID, it must be left blank.** You can also use a unique identifier in field 5 that OrgPublisher will use if field 17 is blank. If both fields are null, you can, instead, set up a

Field Number	Excel Column	Required	Field Name	Description
				custom field with the Type selected as **Position ID**.
18	R	No	Level Number	Level number is used to pass in your levels for use in the multi-level peer display. This is a numeric absolute value level, for instance, if the manager grade level is 10 and the report-to is 1, OrgPublisher charts the report-to box as 9 levels below the manager box. The level number is a differential from the parent level number, either in ascending or descending order. The sequence cannot change in the middle of the "chain." There are 10 levels to work with at each parent box level; any differential greater than 10 displays at the same level as 10. If there is no value in the parent box, it is assumed to be 0 (zero).
19	S	No	Reserved	Field 19 is reserved for use by OrgPublisher. To avoid problems when you are creating an org chart automatically from data and to ensure compatibility with future versions of OrgPublisher, leave these fields blank.
20 +	T +	No	Custom Fields and Summary Fields	Use these fields for your custom data, such as summary fields, phone numbers, room numbers and hotspot URLs, etc. If you plan to use the EChart security option, custom fields must be created to hold the unique identifiers for both the Password and User ID. **Note:** In OrgPublisher Premier, the Summary Wizard inserts placeholders, if necessary, which display in the Custom Field Properties dialog. These fields within OrgPublisher, occupy sequences **20 -25**, and are designated as field types other than summaries, such as **Text**, **Hotspot**, or **Email**. As you create summary fields, OrgPublisher starts placing them in sequence **26**. When importing numeric fields, make sure that you do not use any leading symbols, such as dollar signs. Also, verify that decimal places are set the way you want them prior to importing those fields. OrgPublisher does not change the value of numeric fields you bring in. Formatting cannot change the value of the data you import. **Example:** "1","2","ABC Department","M",,"Smith","A",,"JOB001","Super visor",,,,,,,,,"1995/12/02","2495"

Field Number	Excel Column	Required	Field Name	Description
50-64	AX-BL	No	Succession Candidate Fields	Input fields 50 through 64 are designed to be used with one of the OrgPublisher succession templates. After populating these fields in the Input File with your custom data, open the Custom Field Properties dialog and select where these fields should be displayed in your chart. Can be used to help define a successor group. Special formatting for a successor position comes automatically with OrgPublisher. **50** - Key Person **51** - Location **52** - Age **53** - Salary **54** - Performance Rating **55** - Education Level **56** - Skills **57** - Certifications **58** - Competency Rating **59** - Successor Rank **60** - Designated Successor **61** - High Potential Rating **62** - Readiness **63** - Retention Risk **64** - Impact of Loss
65 and up	BM+	No	Custom fields and Summary fields	Positions 26 - 49 and 65+ can be used for custom fields, as well as summaries. In OrgPublisher Premier, you can perform basic calculations on numeric custom fields in your chart and display this data in a summary field in your org chart.

Input File Layout Rules

When mapping your data to OrgPublisher, keep in mind the following points. If you are working with the Prebuilt Reports features, you must map your data using either the Basic or Advanced file layout, found on the [Support](#) page.

> **Note:** A conditional formatting position type is used for formatting purposes only and does not override a position type pulled from your data source.

Fields

1. Each input record must be laid out according to the Input File Layout one of the Prebuilt Report layouts.

2. The first two fields in each record must contain the correct reporting relationship information before a chart structure can build successfully.

3. The first 10 fields in each input file must be mapped correctly, matching the OrgPublisher layout, although only the first two fields are required to contain data.

4. Field **5** must contain a **unique person or employee ID** if you intend to display multi-relationship icons in your chart. **This ID should not contain sensitive information because it is displayed in the Update Person dialog and is searchable by end users.**

5. Fields **11**, **16**, **17**, and **19** are reserved fields for use by OrgPublisher. Populating field **17** with a unique position ID is strongly recommended when using OrgHistory.

6. Fields **12**, **13**, and **14** can contain sequence numbers (integers only) used by OrgPublisher. Field **12** is used to Sort by box ID in the Sort Options feature.

7. Field **4** contains the record type. The record type defaults to **E** (employee) when blank.

8. Use Field **18** for level numbers if you want to use the Multi-level Peer Display feature. *The Multi-level Peer Display feature is not applicable to Assistant boxes and boxes reporting to Assistants.*

9. Custom fields begin with Field **20** and can continue sequentially through the rest of the fields.

10. If you plan to use the Compare Two Charts feature, it is strongly recommended that you create a custom field called **Position ID** and assign a unique ID to each instance of a person in the chart. In addition, each open position should be assigned a unique ID.

11. Summary fields begin with Field **26** and can continue sequentially through the rest of the fields.

12. It is necessary to enclose fields in quotes only when there is a comma within the field, for example, "Smith,jr". The following record is valid, **0001,0002,Box title,B,,,,,,,**.

13. Make sure that the Input File does not contain the quote character within any field. The following record is invalid, **0001,0002,"Sales" Dept.", B,,,,,,,,**.

14. There should be no blank spaces or special characters (such as **#**, **-**, **|**, **+**, **=**, **<**, **>**, **@**, **$**, **&**, etc.) in field names.

15. You can create open positions in your chart by passing null records into the **Last Name**, **First Name**, and **Middle Name** input fields (Fields **6**, **7**, and **8**).

16. When building a succession planning chart, you must select the Specify custom field order option to map your data. This allows you to map your data to standard Succession Candidate fields (Fields **50** - **64**).

Record types

1. The Record Type defaults to **E** (employee) when blank.

2. Record types **B** and **BA** do not display names or job titles in the chart boxes.

3. Chart boxes are built in ascending sequence by **Box ID**.

4. Job titles display in ascending sequence by **Job ID** within each box.

5. Each record in an OrgPublisher file represents a position in the chart.

6. Custom position record types should be defined in your text input file. Custom position record types may be defined in the chart by selecting **Edit** from the menu bar, then **Define** from the pull-down menu. The custom record type should include before and after brackets, for example **<T>**.

7. The input records may be in any order.

8. If Box IDs are the same for two records and they report to the same manager, they are placed in the same box.

9. Assistant boxes (record type **BA**) cannot have a reporting Assistant box.

10. Assistant boxes (record type **BA**) cannot have a reporting Partner box (record type **P**).

11. Boxes reporting to Assistant boxes (record type BA) cannot have reporting boxes.

12. Charts containing Succession Candidate (record type **SC**) contain no hierarchical information.

Data files

1. Always use the same text file name each time you export data from your database. The text file name should match the template file (**OTM**) name and should also be located in the same directory as the template file. OrgPublisher automatically creates the **OTM** file when you save your chart.

2. An input text file that does not have a corresponding template file (**OTM**) is assigned a default template automatically by OrgPublisher.

3. Avoid naming your text data with the extension **OCP**. This is reserved for use by OrgPublisher when publishing a file.

4. There should be no blank records at the end of the file.

5. When the AutoTitle feature is enabled, the top box title displayed in the chart is used as the chart title.