



OrgPublisher Bringing in the Data

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Create a Chart – CSV File in OrgPublisher Specified Order

In order to create your first chart, OrgPublisher must be installed and have access to your HR system or data feed from your HR system. OrgPublisher checks your data, as detailed in the [Before You Begin](#) document. Hierarchy is the first check.

For the first chart, the simplest method for opening and viewing a chart is detailed here, CSV file in the OrgPublisher specified order. You can begin with just hierarchical data – the Parent Box ID and the Box ID. If the file is viewed in Notepad, it looks something like this:

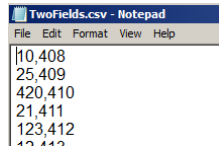


Figure 1.

Create this file with your own HR data and place it in a folder you can access. If using Web Administration, the file must be placed on the server where OrgPublisher Web Administration is installed. Typically, this is the **SourceCharts** folder on the server, **C:\inetpub\wwwroot\opweb\SourceCharts**.

Launch OrgPublisher – Open an Existing Chart

Launch Client

1. Double-click the OrgPublisher icon on your desktop or on the server desktop, as instructed by your IT group.
2. Click **More Files** in the OrgPublisher window and browse to the .csv file containing the **Parent Box ID** and the **Box ID**.
3. Click **Open**.

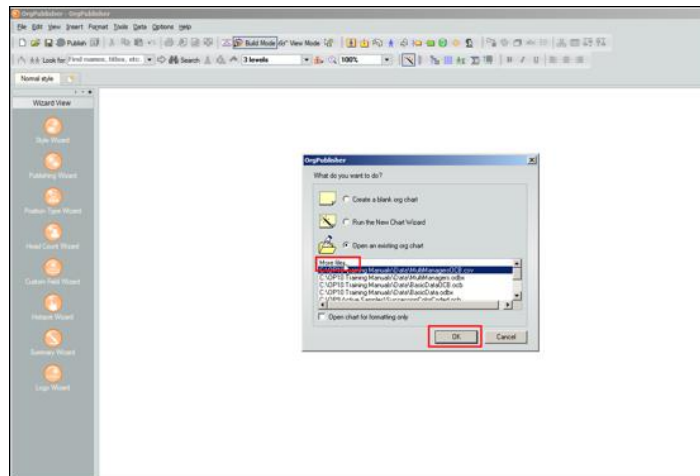


Figure 2.

Launch Web Administration

1. Click the link provided by your IT group.
2. Locate the file containing the **Parent Box ID** and the **Box ID** in the *Select a Chart to Open* dialog.
3. Click **Open**.

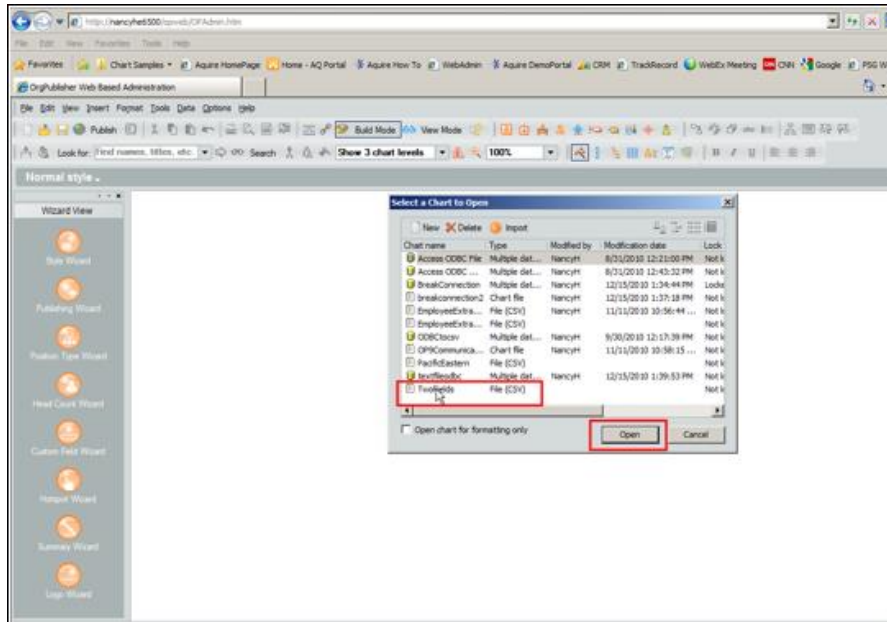


Figure 3.

- a. OrgPublisher Web Administration allows multiple chart administrators to access and modify charts stores in a common area of the server. To view the status of a chart, scroll to the right in the *Select a Chart to Open* dialog.

The **Locked** or **Not Locked** status is noted, as well as when it was locked and who locked it.

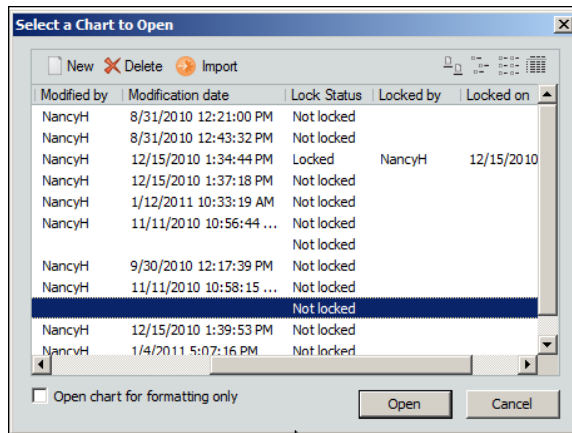


Figure 4.

- b. If a chart is locked, you can open it as read-only. Select the chart and click **Open**. Click **Open Read-Only**.



Figure 5.

Opened Chart – Two Fields

Whether you opened your chart in Web Administration or the Client, you see something similar to the sample below.

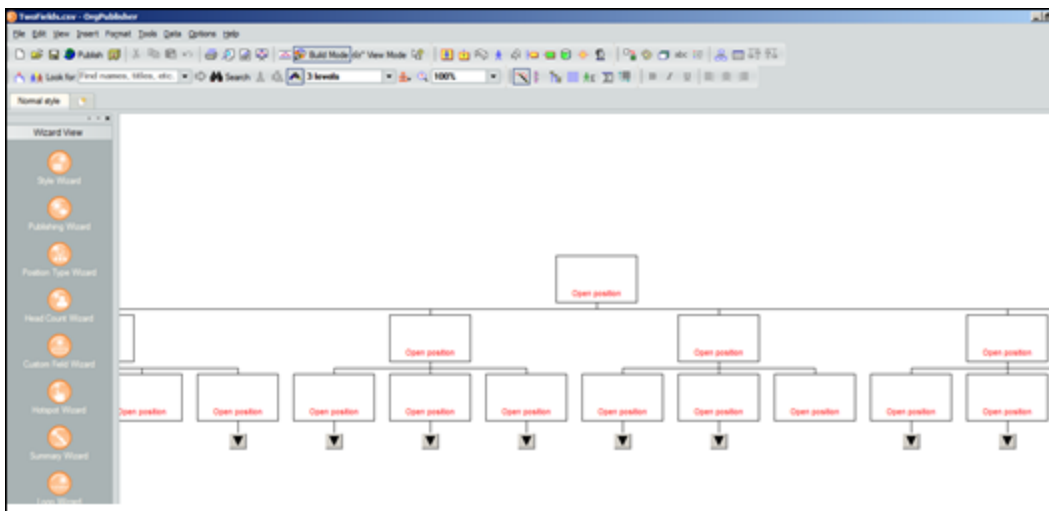


Figure 6.

If you see an error message, refer to the Data Errors section of the Before You Begin document. For purposes of this exercise, you can click **OK** in the error message dialog to continue. In the next step, more data is brought into the chart to help you assess the type of data errors you may receive. First, review the information immediately following.

Build Mode vs. View Mode

OrgPublisher indicates that you are in Build Mode.

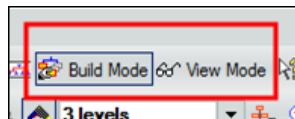


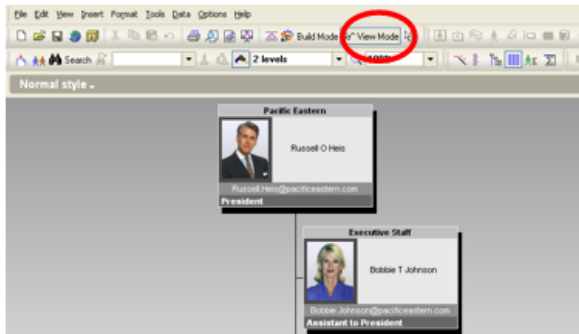
Figure 7.

Build Mode is an editing mode and you are not connected to your data. This mode allows changes to the text in the chart boxes, including hierarchical changes.

Note: If you make hierarchical or text changes and then pull a new data extract, you overwrite your data file and lose your changes. This editing method should be used only for quick fixes when data cannot be readily retrieved from the HR source.

- View Mode displays the chart as it will look on the intranet. It is exactly what the chart viewer sees.
- Build Mode displays all fields within the chart and allows editing.
- Build Mode displays all custom fields assigned to a designated box.
- If an ODBC (.odbx file) connection was created, OrgPublisher saves the data in to an .ocb file. Any data changes made are stored in the .ocb file. You cannot refresh an .ocb file.

View Mode



Build Mode

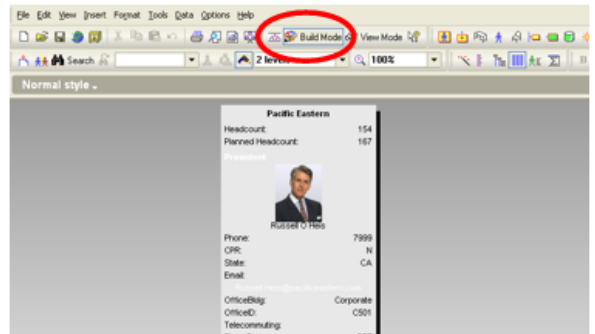


Figure 8.

Open Chart with Additional Fields

Continue to add fields to your chart/data extraction. We are still using the CSV file in the OrgPublisher specified order method for creating chart data.

In the examples below, the following fields are passed into OrgPublisher:

- Parent Box ID (Field 1, Column A)
- Box ID (Field 2, Column B)
- Department Name (Field 3, Column C)
- Last Name (Field 6, Column F)
- First Name (Field 7, Column G)
- Job Title (Field 10, Column J)

OrgPublisher Bringing in the Data
Create a Chart – CSV File in OrgPublisher Specified Order

Notepad

Microsoft Excel

```

10Field.csv - Notepad
File Edit Format View Help
10,408,Local Sales,,Hayes,Rita,,Sales Secretary
25,409,Print,,Kelly,Michael,,Print Planner
420,410,National,,Kerr,Pam,,Product Specialist
21,411,Print Media,,King,Judy,,Writer
123,412,Human Resources,,Little,Ethan,,Human Resource Coordinator
12,413,Market Research,,Long,Rachelle,,Research Assistant
7,109,414 Collateral,,McCoy,Kristin,,Paste-up Artist
8,420,415 National,,Metz,Laura,,Product Specialist
9,100,416 Collateral,,Reed,Daniel,,Collateral Manager
10,38,417 Hi Tech,,Roberts,Christopher,,Sr Writer
11,99,418 Internal Broadcast,,Rogers,Anthony,,Associate Producer
12,131,419 Business Aps Team,,Rollins,Sheila,,QA
13,65,420 National,,Santiago,Richard,,Account Executive
14,301,304 Finance,,Richards,Paul,,Accounts Payable Manager
15,302,306 Finance,,Anderson,Caroline,,Accts Rec/Cash Mgr
16,55,220 Payroll,,Pearson,Laney,,Payroll Administrator
17,63,132 National,,Amster,Gail,,Product Specialist
18,22,117 Collateral,,Banner,Henry,,Writer
19,7,17 Television & Cable Creative,,Bannister,Mia,,Producer
20,25,115 Broadcast,,Bates,James,,Broadcast Media Planner
    
```

	A	B	C	D	E	F	G	H	I	J
1	10	408	Local Sales			Hayes	Rita			Sales Secretary
2	25	409	Print			Kelly	Michael			Print Planner
3	420	410	National			Kerr	Pam			Product Specialist
4	21	411	Print Media			King	Judy			Writer
5	123	412	Human Resources			Little	Ethan			Human Resource Coordinator
6	12	413	Market Research			Long	Rachelle			Research Assistant
7	109	414	Collateral			McCoy	Kristin			Paste-up Artist
8	420	415	National			Metz	Laura			Product Specialist
9	100	416	Collateral			Reed	Daniel			Collateral Manager
10	38	417	Hi Tech			Roberts	Christopher			Sr Writer
11	99	418	Internal Broadcast			Rogers	Anthony			Associate Producer
12	131	419	Business Aps Team			Rollins	Sheila			QA
13	65	420	National			Santiago	Richard			Account Executive
14	301	304	Finance			Richards	Paul			Accounts Payable Manager
15	302	306	Finance			Anderson	Caroline			Accts Rec/Cash Mgr
16	55	220	Payroll			Pearson	Laney			Payroll Administrator
17	63	132	National			Amster	Gail			Product Specialist
18	22	117	Collateral			Banner	Henry			Writer
19	7	17	Television & Cable Creative			Bannister	Mia			Producer
20	25	115	Broadcast			Bates	James			Broadcast Media Planner

Figure 9.

It is much easier to see the data when viewing it in Excel. If you open your extraction in Excel, save it as a .csv file. Place this file in the appropriate location for your Administration install and open it in OrgPublisher. If you do not have data errors, you see a file that looks similar to this:

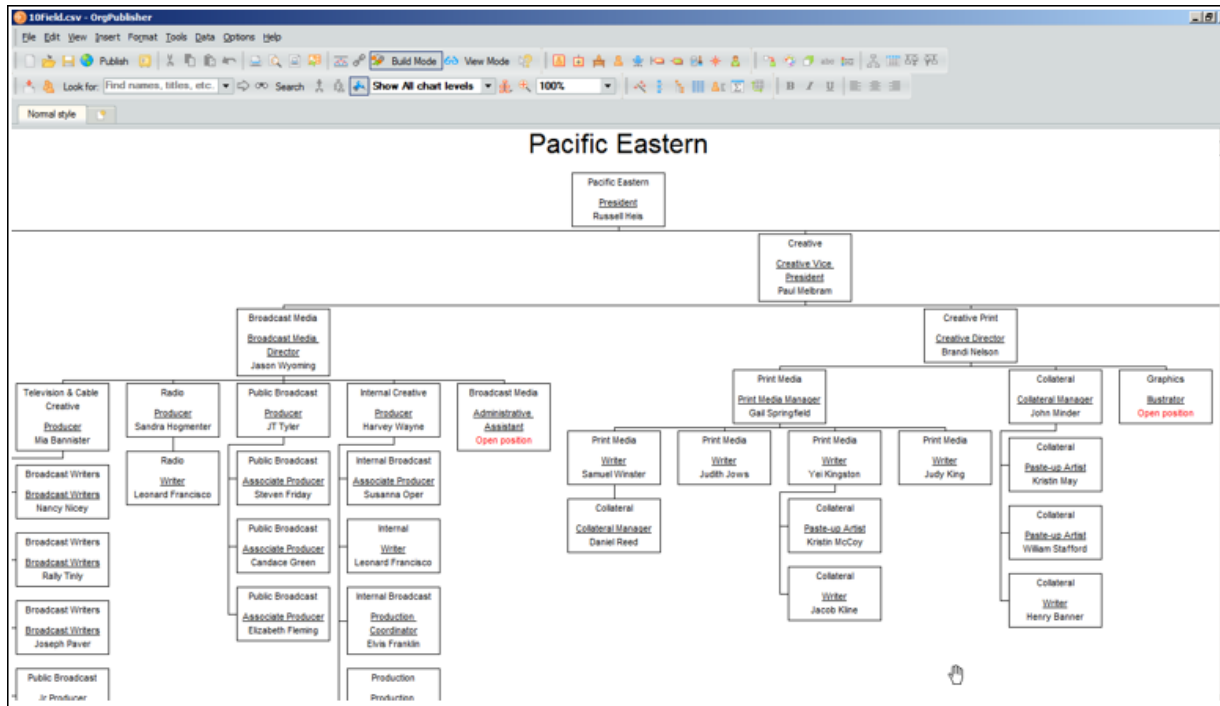


Figure 10.

As a refresher, Open Positions are displayed in this sample because the data represents a position-to-position hierarchy.

If your data does have errors, the additional data should help you identify the people with errors. Follow the information provided in the *Data Errors* section of the *Before You Begin* document, on the [Support](#) Web page, to copy, paste into Excel, and then work on errors.

Launch OrgPublisher – Create a New Chart

As noted earlier, there are several ways to bring data into OrgPublisher. This section discusses creating a new chart using the *New Chart Wizard*.

Create Charts with an ODBC Compliant Database

The *New Chart Wizard* walks you through each step to create an ODBC connection.

Launch Client

1. Double-click the OrgPublisher icon on your desktop or on the server desktop, as instructed by your IT group.
2. Select **Run the New Chart Wizard** in the OrgPublisher dialog.

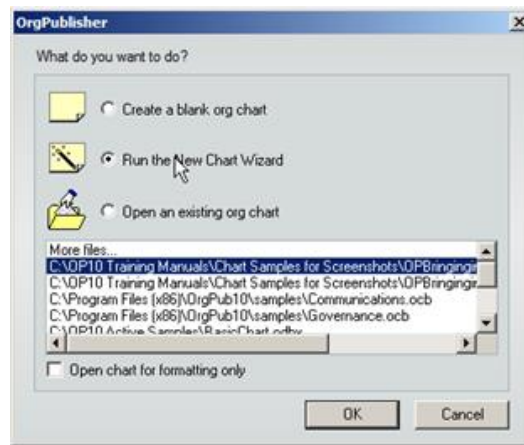


Figure 11.

Launch Web Administration

1. Click the link provided by your IT group.
2. Select **New** in the *Select a Chart to Open* dialog.

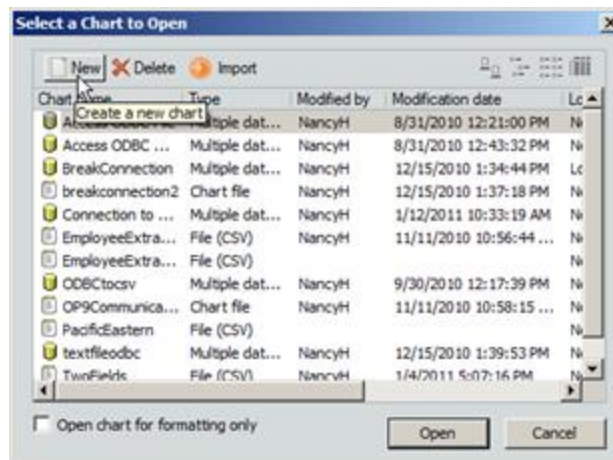


Figure 12.

Both Client and Web Administration

1. Select **Organizational chart** and click **Next**.

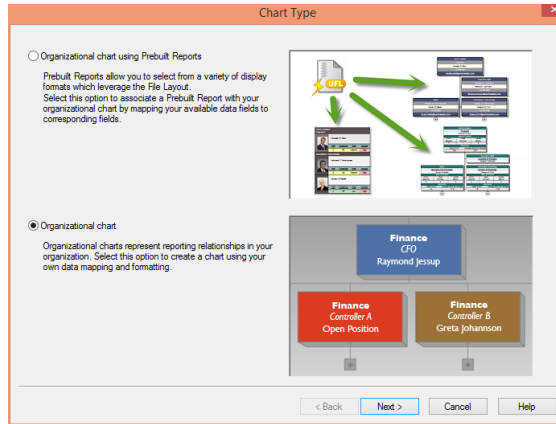


Figure 13.

2. Select **ODBC Database** and click **Next**.

Client

Web Administration

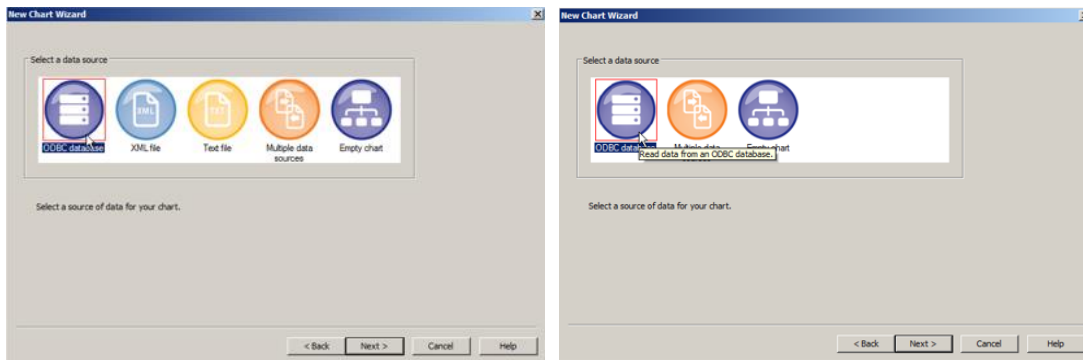


Figure 14.

3. Select an existing DSN to access the database or create a new DSN, if needed. Click **Next**.

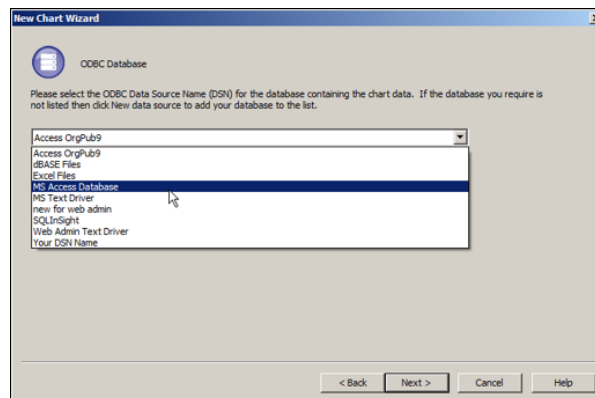


Figure 15.

4. Select the table, query, or view you want to use, or select **Custom SQL** to write your own SQL statement.

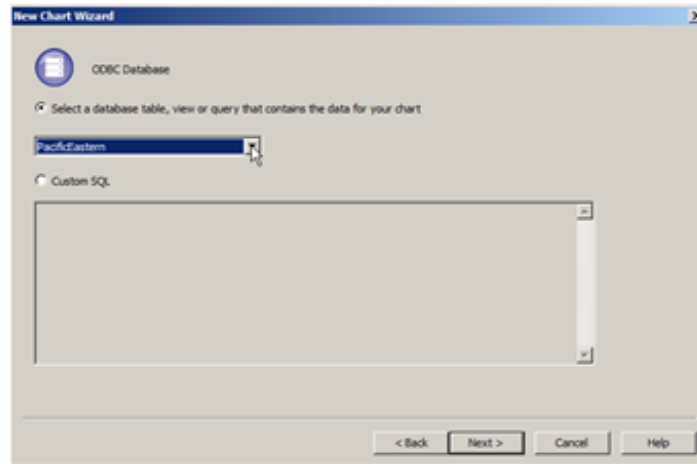


Figure 16.

If you selected a database table, view, or query, the first 100 records are displayed in a data preview window. Click **Next**.

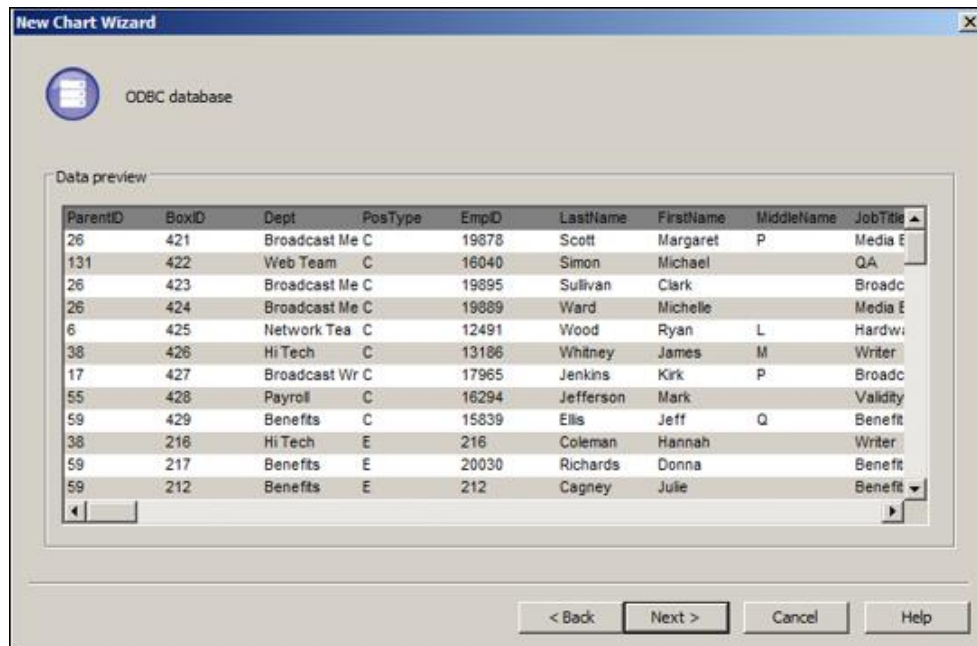


Figure 17.

5. If the table, query, or view selected is not laid out in the standard OrgPublisher field order, select **Specify custom field order**.

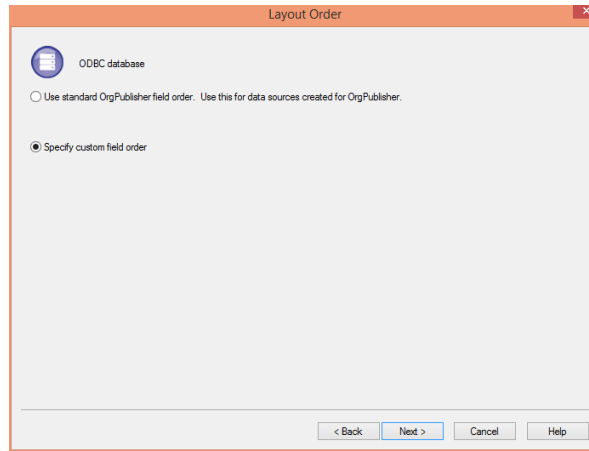


Figure 18.

This enables the mapping option.

If the data is laid out in the correct field order, then select **Use standard OrgPublisher field order**. Click **Next**.

6. A drop-down arrow displays above each data column with the default selection of **Do not import**. Click the drop-down arrow to display other field options and select the appropriate option for the field/column of data.

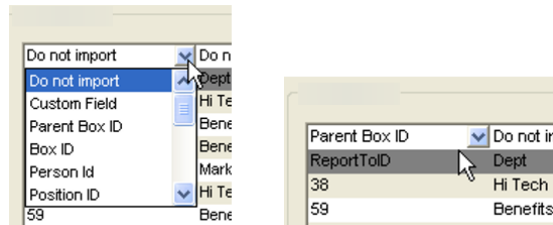


Figure 19.

As you select the field option in the drop-down list and move to subsequent columns, the previously selected mappings are faded or grayed-out. This indicates that you have already identified a field/column for this type of field.

If a field type (other than Custom Field) is used more than once, the field type switches to red text. Duplicate usage of a field type must be limited to Custom Fields. Click **Next**.

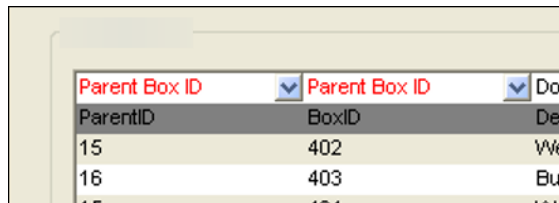


Figure 20.

Note: Each field/column can have only one field type selected.

- You may need to map a single column of data as more than one field type. For instance, you have a column of data that contains the Employee Number. You want to use it as Field5 (Person ID), and you want to display the field in the chart as a custom field.

Scroll down to the last option in the drop-down list and click **Multiple**.

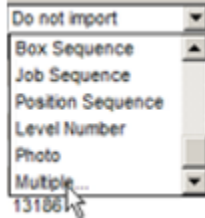


Figure 21.

The *Multiple Field Mapper* dialog opens.

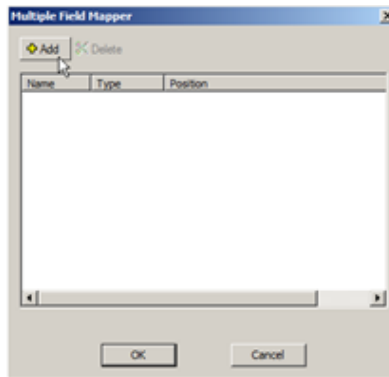


Figure 22.

- Click **Add**. The Mapper inserts **Custom Field** as the first mapping.

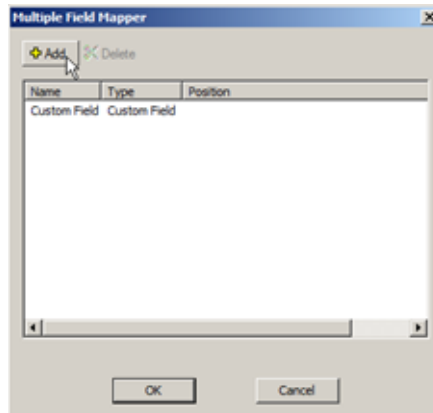


Figure 23.

- Click **Custom Field** in the **Name** column to display all available options and click the field you want.

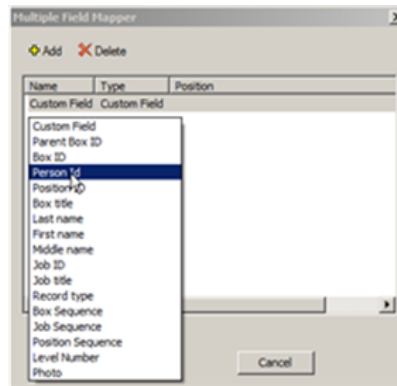


Figure 24.

The selected field information replaces the generic text.

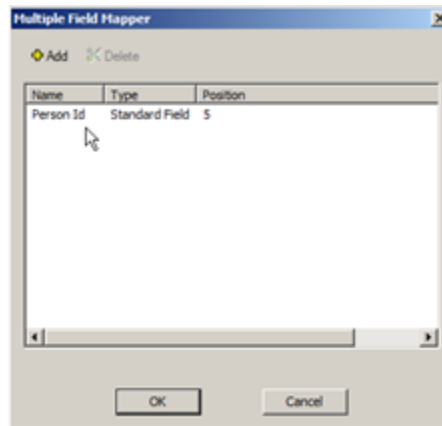


Figure 25.

- Click **Add** to select the second mapping type of **Custom Field**, and repeat Step 9.

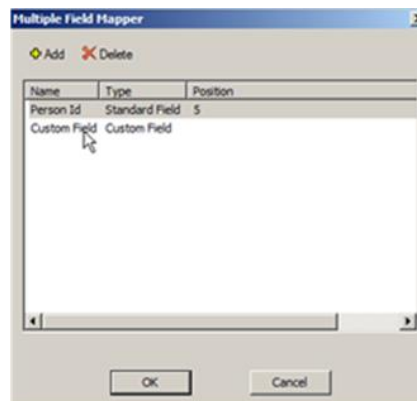


Figure 26.

- When you have completed your mapping selections, click **OK** to close the dialog. The mapped column in the wizard dialog is now labeled **Multiple**. Click **Next**.

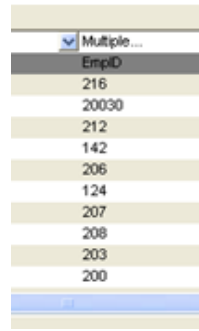


Figure 27.

- Clear the **Launch the style wizard** check box. Click **Finish**.

Note: The **Launch the style wizard** check box is selected by default. We recommend that, as you begin to use OrgPublisher and field mapping, you focus on the data fields. You can run the *Style Wizard* once you have the data you need in the chart.

The chart opens.

- Save the chart as an ODB file, using the .odbx file extension. Using this extension indicates that the fields have not been mapped by the user.

Create Charts with a Comma-Separated File in No Specific Order

This method only works in the OrgPublisher Client. It does not work with Web Administration.

If you are connecting to a text file that is not laid out in the order specified by OrgPublisher, the *New Chart Wizard* walks you through each step to create a connection and map the fields.

- Launch the *New Chart Wizard* and select **Organizational chart**. Click **Next**.
- Select **Text file** and click **Next**.

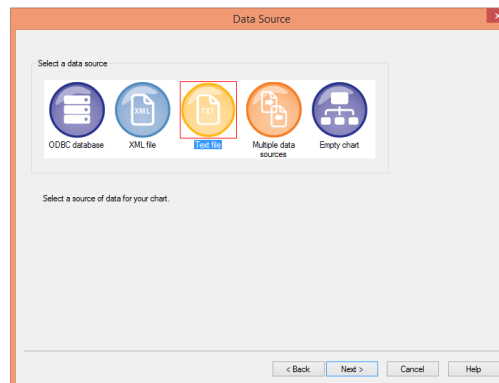


Figure 28.

- Browse** to locate and select the .txt, .csv, or .ocb file. Click **Next**.

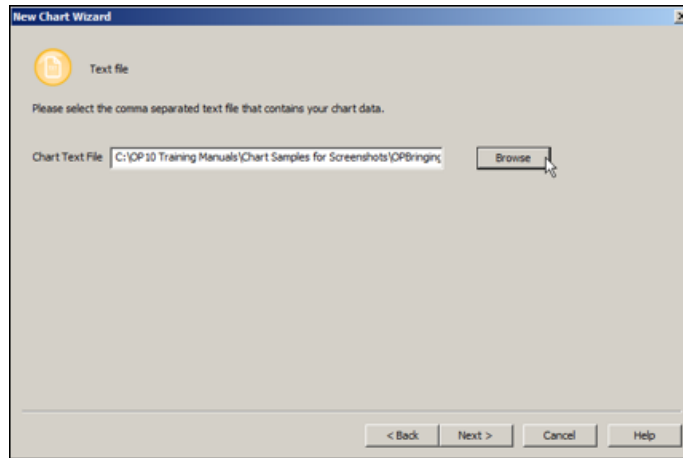


Figure 29.

- If the text file contains a header row, select **First row contains column names**. Click **Next**.

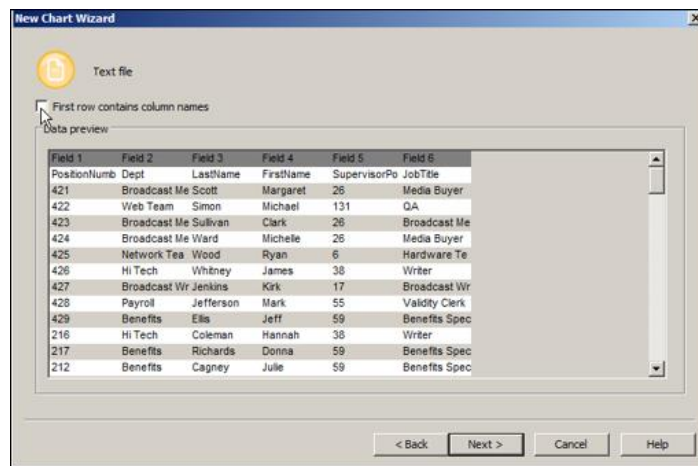


Figure 30.

- If the data source is laid out in the specified order required by OrgPublisher, select **Use standard OrgPublisher field order**. If the fields are not in the standard order, select **Specify custom field order**. Click **Next**.
- A drop-down arrow displays above each data column with the default selection of **Do not import**.

Click the drop-down arrow to display other field options and select the appropriate option for the field/column of data.

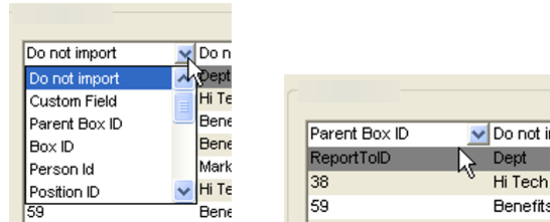


Figure 31.

As you select the field option in the drop-down list and move to subsequent columns, the previously selected mappings are faded or grayed-out. This indicates that you have already identified a field/column for this type of field. If a field type (other than Custom Field) is used more than once, the field type switches to red text. Duplicate usage of a field type must be limited to Custom Fields. Click **Next**.

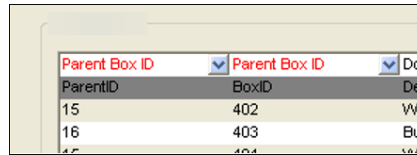


Figure 32.

Note: Each field/column can have only one field type selected.

- You may need to map a single column of data as more than one field type. For instance, you have a column of data that contains the Employee Number. You want to use it as Field5 (Person ID), and you want to display the field in the chart as a custom field.

Scroll down to the last option in the drop-down list and click **Multiple**.

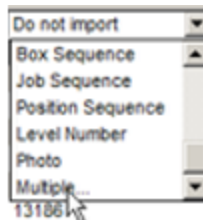


Figure 33.

The *Multiple Field Mapper* dialog opens.

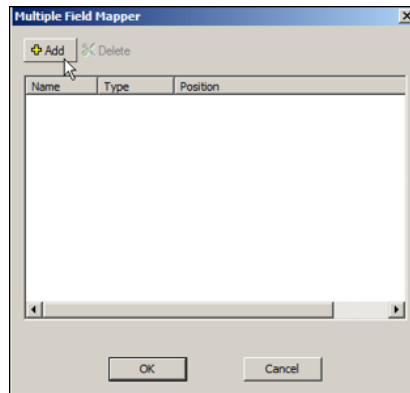


Figure 34.

8. Click **Add**.

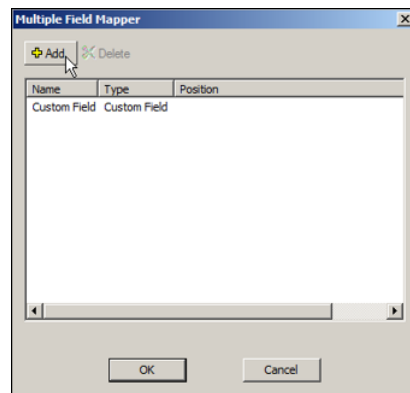


Figure 35.

The Mapper inserts **Custom Field** as the first mapping.

9. Click **Custom Field** in the **Name** column to display all available options and select the field you want.

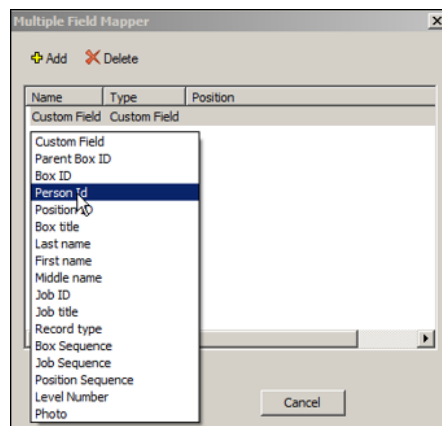


Figure 36.

The selected field information replaces the generic text.

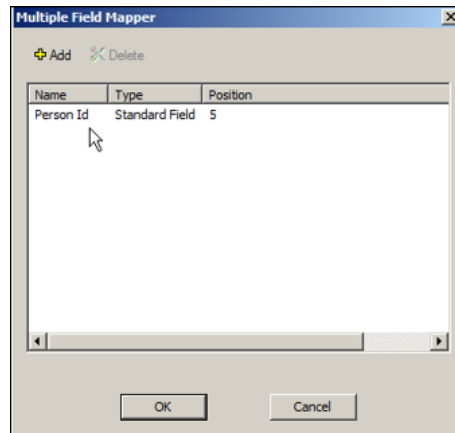


Figure 37.

10. Click **Add** to select the second mapping type of **Custom Field**, and repeat Step 9.
11. When you have completed your mapping selections, click **OK** to close the dialog. The mapped column is labeled **Multiple**. Click **Next** in the wizard dialog.

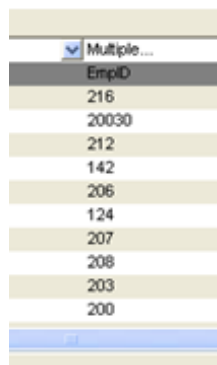


Figure 38.

12. Clear the **Launch the style wizard** check box. Click **Finish**.

Note: The **Launch the style wizard** check box is selected by default. We recommend that, as you begin to use OrgPublisher and field mapping, you focus on the data fields. You can run the *Style Wizard* once you have the data you need in the chart.

The chart opens.

13. Save the chart file. The file includes an .odbx extension. Using this extension indicates that the fields have not been mapped by the user.

Create Charts with a Comma-Separated File

This section details how to open a .csv file from your HR data source that has been generated using the required OrgPublisher field order. Whether using the Client or Web Administration, each time the .csv file is created or updated, it must be:

- Named the same
- Stored in the same location

Launch Client

1. Double-click the OrgPublisher icon on your desktop or on the server desktop, as instructed by your IT group.
2. Scroll through the list of recently opened file and select the desired file. Or, click **More Files** in the OrgPublisher window and browse to the location and file you want.
3. Click **Open**.

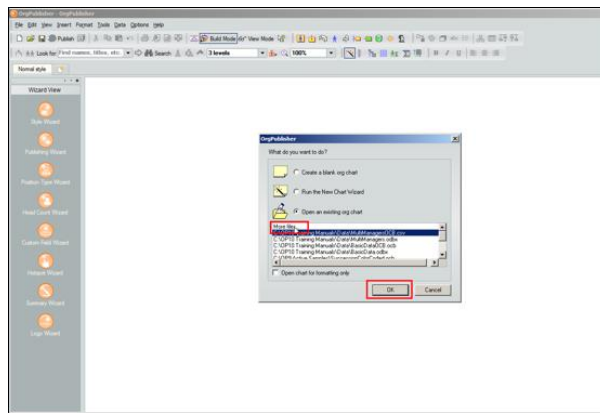


Figure 39.

Launch Web Administration

1. Click the link provided by your IT group.
2. Locate the file **D** in the *Select a Chart to Open* dialog and click **Open**.

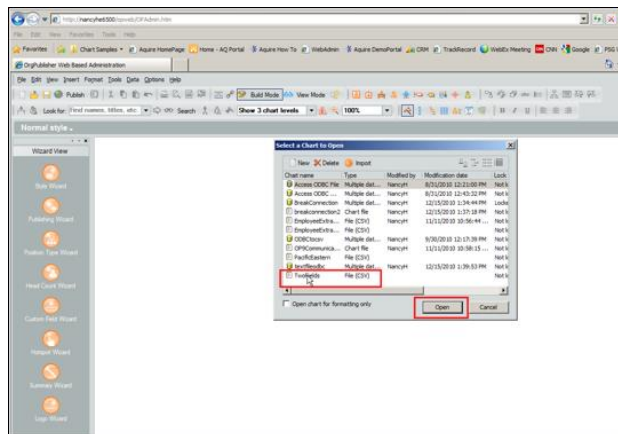


Figure 40.

Create Charts with XML

Using an XML data feed is not a commonly used method.

Note: Mapping is not available using an XML file. Records must be in the required OrgPublisher field order. XML is not available in Web Administration.

1. Double-click the OrgPublisher icon on your desktop or on the server desktop, as instructed by your IT group, and select **Run the New Chart Wizard**. Click **OK**.
2. Select **XML file** and click **Next**.

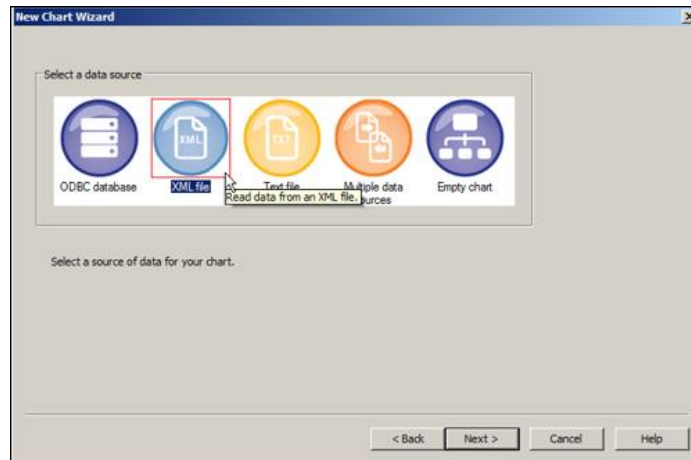


Figure 41.

3. **Browse** to the XML file location. Select the file and click **Next**.

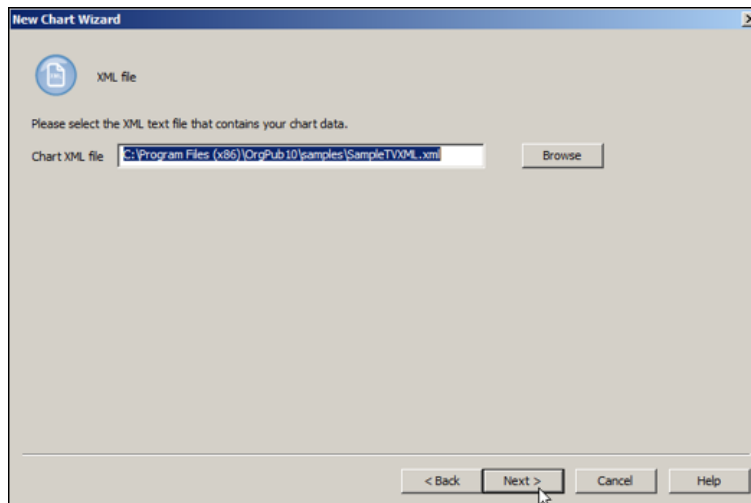


Figure 42.

The first 100 fields appear in the *Data Preview* dialog. Click **Next**.

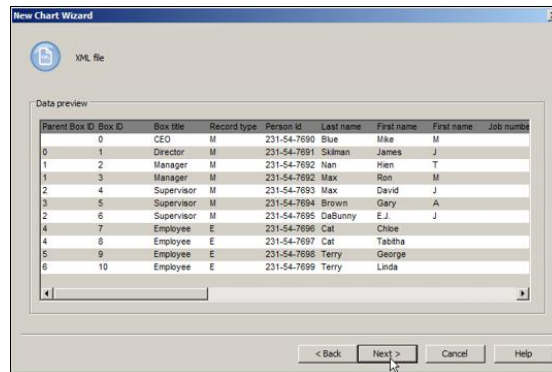


Figure 43.

4. Clear the check mark for **Launch the style wizard** and click **Finish**.

Note: The **Launch the style wizard** check box is selected by default. We recommend that, as you begin to use OrgPublisher and field mapping, you focus on the data fields. You can run the *Style Wizard* once you have the data you need in the chart.

The chart opens.

5. Save the chart file. The file includes an .odbx extension. Using this extension indicates that the fields have not been mapped by the user.

Import

This option is available only in Web Administration and is not enabled in the OrgPublisher Client. **This is a one-time only import.**

The import option allows the chart administrator to bring in a comma-separated file that is laid out in the required OrgPublisher field order. If the data requires updating on a regular basis, then the .csv file must be given the same name and placed in the **SourceCharts** folder on the Web Administration server.

1. Open the link provided by your IT group and click **Import** in the *Select a Chart to Open* dialog.

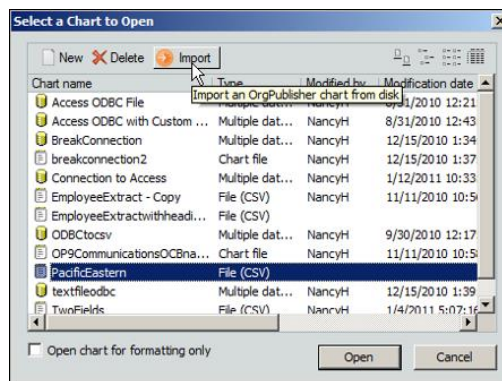


Figure 44.

Multiple Data Sources

OrgPublisher accepts data from more than one data source. This is best accomplished by building the connection to the additional data sources using the OrgPublisher Client. The *New Chart Wizard* prompts the user to pull data via ODB, a Text file, or XML.

There are three reasons why you might want to bring in additional data:

- Adding additional boxes, persons, or positions
- Adding additional custom fields for records already existing in the primary data source
- Adding succession candidate records that link to records already existing in the primary data source – these records automatically hold a Successor Position Type

Other important information:

- When using Web Administration, if the secondary data source is a .csv file or XML, the server owner can log on and create the connection using the Client. This connection is accessed by the chart administrator via Web Administration.
- You don't have to decide that you need additional data sources when you create a new chart. Additional data sources can be added later.
- If established data feeds are modified to add additional custom fields in the future, these fields must be added at the END of the data feed. Do not insert additional fields "between" existing fields.

Add Additional Records

This option allows you to bring in more records from another data source. These records can be a list of your contractors, temps, or interns, as well as employees that are on a different HR system. The key to this data is to have Parent Box IDs that exist in the Primary Source or the Secondary Source. This is the only way OrgPublisher can attach the additional record to the primary chart.

1. Open OrgPublisher and start the *New Chart Wizard*.
2. When prompted to select a data source, select **Multiple data sources**.



Figure 45.

3. Follow the dialog prompts to select a primary data source and define your fields.
4. Once the primary source is ready to use, the wizard prompts you to **Enter a nickname for this data source**. Click **Next**.

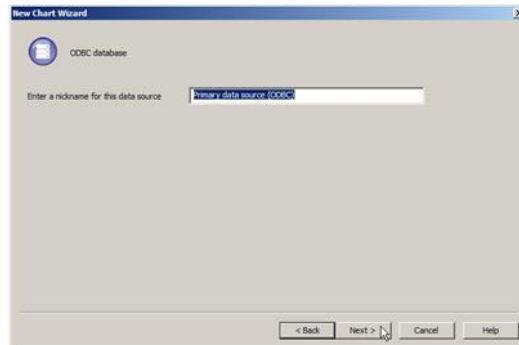


Figure 46.

5. Select **Yes** when the wizard dialog asks if you have any additional data sources and click **Next**.

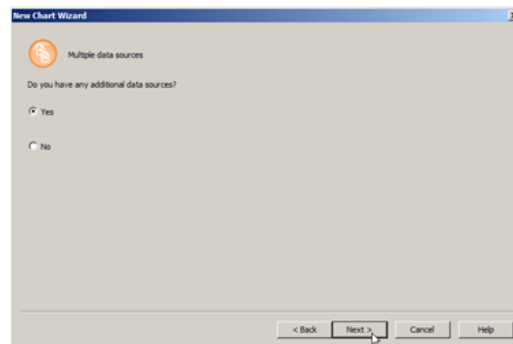


Figure 47.

6. Select the type of data contained in the additional source file. The following sample shows that **Additional boxes, positions, and persons** has been selected.
7. New records, as selected in step 6, can be assigned a position type, if applicable. Select **All new positions have the following position type**.
The position type field is enabled. Click the drop-down arrow and select the position type you want to use.

In this sample, we chose **Contractor**. Click **Next**.

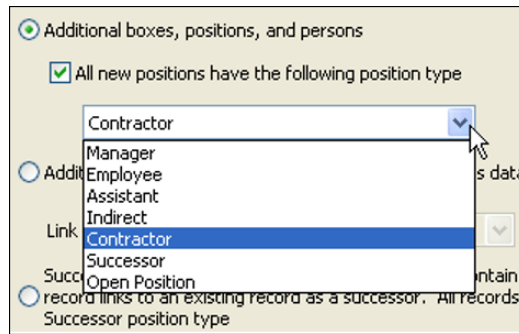


Figure 48.

8. Follow the prompt to map your fields.
9. Once the secondary source is ready to use, the wizard prompts you to **Enter a nickname for this data source**. Click **Next**.
10. If additional data sources are required, select **Yes** and repeat steps 6 – 9. If no additional sources are required, select **No** and then click **Next**.

The chart opens with the combined data from your selected sources. The following example shows that the Contractor boxes are formatted. It also displays head counts for contractors.

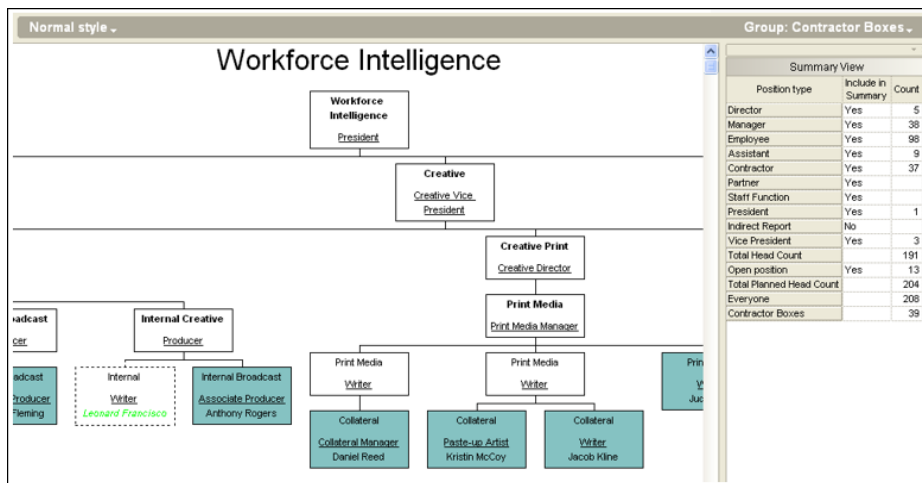


Figure 49.

Add Fields of Data from an Additional Data Source

The next option within multiple data sources is adding fields of data for the existing records in your primary data source. These fields can be from an asset source that shows equipment assigned to employees in the primary HR source file.

The primary data source, as well as the additional source must both contain the Employee/Person ID in order to attach the additional files to the correct employees.

1. Open the *New Chart Wizard* and select **Multiple data sources**. Click **Next**.

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2. Create your primary data source connection and follow the prompts to ready that data.
3. When prompted for additional data sources, select **Yes** and click **Next**.
4. This time, select **Additional fields for existing records**. The **Link to** field is enabled. Click the drop-down arrow and select the field that unites the two data sources, for example, **Person ID**. Click **Next**.

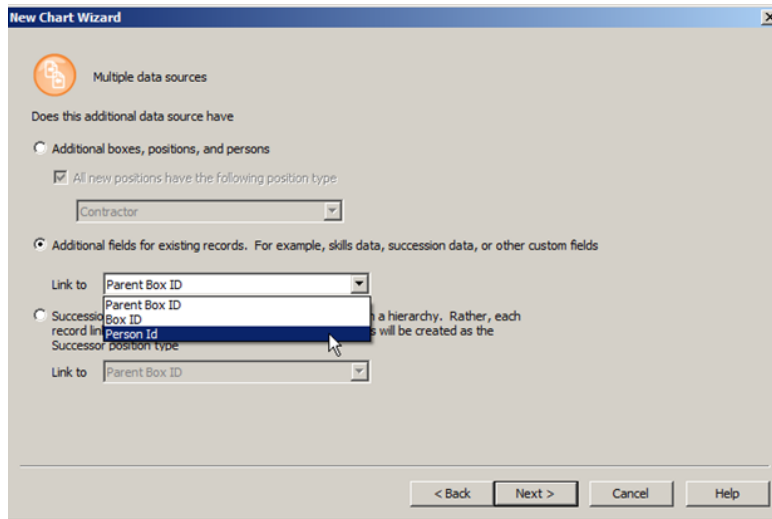


Figure 50.

5. Select the additional data source type and click **Next**.
6. Click **Next** again in the *Data preview* dialog.
7. Select **Specify custom field order** and click **Next**.
8. Map the additional fields – these are, typically, mapped to **Custom Field**. Click **Next**.
9. Type the nickname for the additional data source and click **Next**.

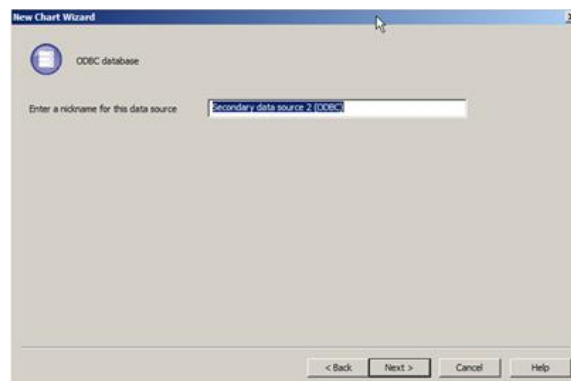


Figure 51.

10. If additional data sources are required, select **Yes** and repeat the appropriate steps from 3 onward. If no additional sources are required, select **No** and then click **Next**.

11. You can either **Launch the style wizard** in the last *New Chart Wizard* dialog, or click **Finish** and define and assign custom fields later. This information is in the OrgPublisher User Guide, as well as the *Custom Fields* document on the [Support](#) web page.

The chart opens and the additional data displays in the chart boxes.

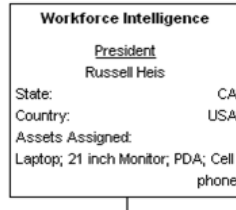


Figure 52.

Add Successor Records

Successor data can be stored in a separate database, but these records can be added using the third option for Multiple Data Sources, **Succession planning information**. Follow the appropriate steps, as outlined in the procedures in this section, to complete the data source add.

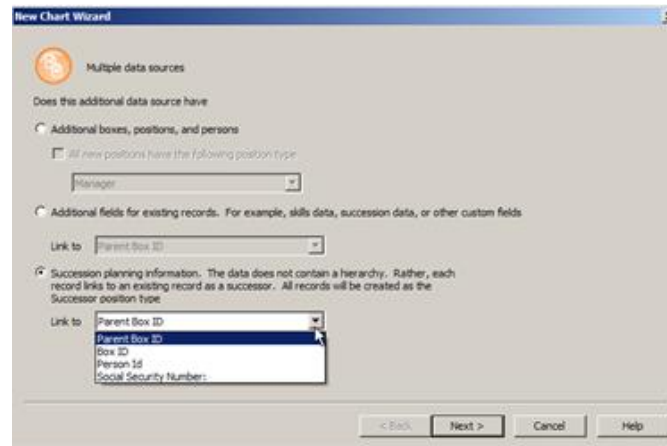


Figure 53.

In the Successor data feed, a field of data must associate to a field of data in the existing chart data in order for OrgPublisher to display the added record as a successor to the field selected in the **Link to** drop-down list.

Add Additional Data Sources to an Existing Chart

You may want to add additional records to a chart that has already been created. This is accomplished using the **Data** menu.

1. Select **Data** from the menu then **Manage data sources** from the option list.

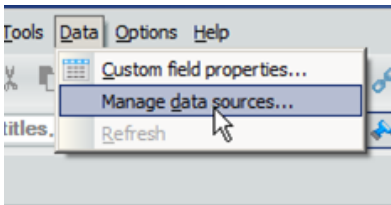


Figure 54.

2. In the *Data sources* dialog, click **New**.



Figure 55.

3. The *New Chart Wizard Multiple data sources* dialog opens. Select the check box and drop-down option for the type of data you want to add.
4. Follow the appropriate steps, as outlined in the procedures in this section, to complete the data source add.
5. Click **Close** in the *Data sources* dialog. The new data is added to your chart. When additional fields are added to existing records, you must define and assign custom fields. This process is in the OrgPublisher User Guide, as well as the *Custom Fields* document on the [Support](#) web page.

Modify Data Sources

You can modify existing data sources to include new fields.

1. Select **Data** from the menu then **Manage data sources** from the options list. The *Data sources* dialog opens.
2. Select the data source to modify and the click **Properties**.

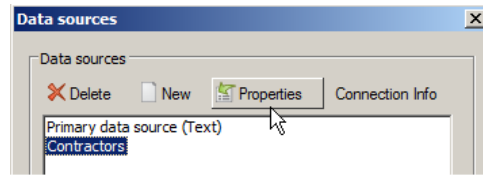


Figure 56.

3. The *New Chart Wizard* opens at the *Data preview* dialog. Click **Next** to continue with the wizard and modify your data and complete the wizard. Click **Close** at the *Data sources* dialog.

Delete Additional Data Sources

You can delete data sources that are no longer needed for a chart, as long the source is not your **Primary data source**, designated when you created the chart.

1. Select **Data** from the menu then **Manage data sources** from the options list.
2. Select the data source you want to delete and click **Delete**.

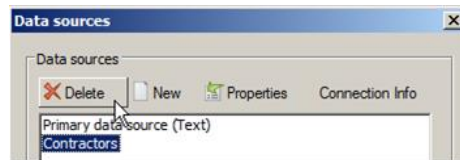


Figure 57.

3. Click **OK** to confirm the deletion then **Close** the dialog.

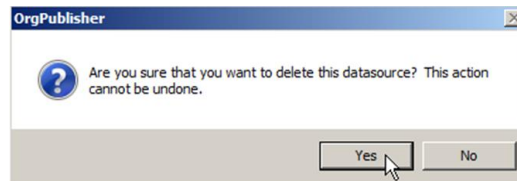


Figure 58.

The data source is removed from the dialog. **Close** in the *Data sources* dialog.