



# **PeopleFluent OrgPublisher 11.14 HTML5 Installation and Configuration Guide**

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# Preface

## Audience

**This guide is intended for the PeopleFluent OrgPublisher HTML5 chart administrator, in conjunction with a server administrator with permissions to turn Microsoft Windows features on or off.**

## Intent

**Administrators can use this document to:**

- **Install the PeopleFluent OrgPublisher HTML5**
- **Create and configure the OrgPublisher HTML5 Administration Instance**
- **Create and configure HTML5 Chart Viewer instances**

**Administrative rights are required for installation. Consult your organization's IT department to ensure all company policies are followed when installing this application.**

## Before You Begin

**The PeopleFluent OrgPublisher HTML5 works in conjunction with the PeopleFluent OrgPublisher application. Before running the installer, verify that the published chart files have been created using PeopleFluent OrgPublisher's HTML5 publishing option and are available on the server.**

## Document Revision

**This section lists the initial publication and any changes or updates that follow.**

*Table 1: Revision Information*

Revision Information	
Revision Date:	July 30, 2017
Revised Document Version Number:	1.0
Details of Revision:	Initial publication.

# Document Conventions

This guide uses the conventions described in this section.

## Notes and Cautions

The following keywords are used in this guide to highlight special information.



Best Practice: Provides industry best practice information.



Note: Provides useful information and reminders to the user.



Caution: Contains information about an action that should be avoided because it might cause an undesirable system response but not data loss or system crash.



**Warning: Tells users to avoid actions that might cause data loss or application crash.**

## Font and Symbol Conventions

Fonts and symbols are used in this guide as follows:

Table 2: Font and Symbol Conventions

Font or Symbol	Description
<u>Blue, underlined text</u>	Used for internal cross-references and URLs for web sites.
<b>Bold</b>	Used for items users will click, such as a menu or button.
SMALL CAPITALS	Used for keyboard keys.
Courier	Used for code samples.
<i>italic</i>	Used to introduce new terms and for book titles, and information that can vary, such as <i>version number</i> .

# Chapter 1: HTML5 Configuration Application Installation

## Prerequisites

Confirm you have the following prerequisites before installing the PeopleFluent PeopleFluent OrgPublisher HTML5:

- **Server Requirements:** See the *PeopleFluent OrgPublisher 11.14 HTML5 Hardware & Software Requirements*.
- **Published HTML5 Charts:** The PeopleFluent OrgPublisher HTML5 works in conjunction with the PeopleFluent OrgPublisher application. Before running the installer, verify that the published chart files have been created using the PeopleFluent OrgPublisher's HTML5 publishing option and are available on the server.

## Installing the OrgPublisher HTML5 Configuration Application

To install the OrgPublisher HTML5 Configuration Application

- 1 Open Microsoft Windows Explorer.
- 2 Navigate to the OrgPublisher installation directory to access the installer. The default directory is C:\Program Files (x86)\OrgPub11\HTML5.

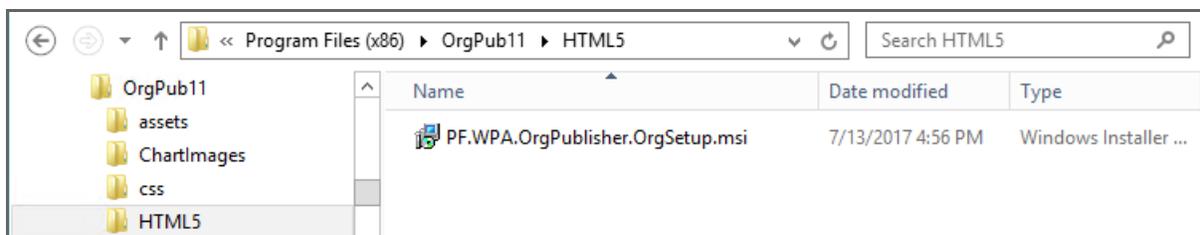


Figure 1: Installer for the OrgPublisher HTML5 Configuration Application

- 3 Double-click the **PF.WPA.OrgPublisher.OrgSetup.msi** file. The OrgPublisher HTML5 Setup Wizard appears.

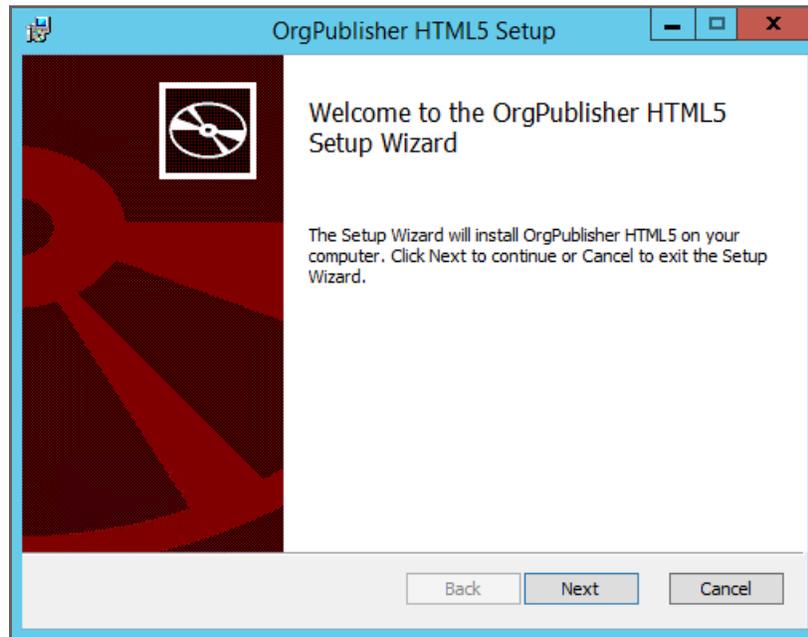


Figure 2: OrgPublisher HTML5 Setup Wizard

- 4 Click **Next**. The Destination Folder dialog box appears.

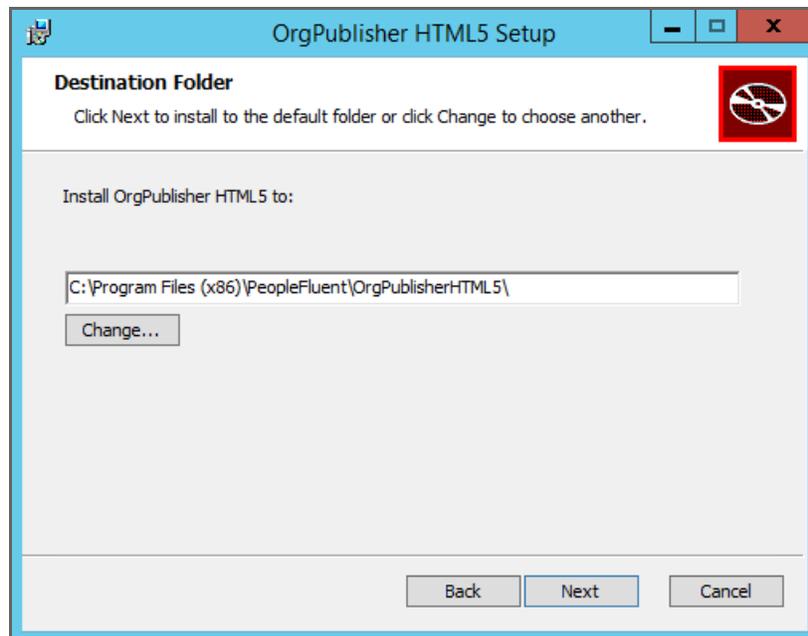


Figure 3: OrgPublisher HTML5 Setup Wizard - Destination Folder

- 5 Click **Next** to accept the default destination, or click **Change**, select another folder, and then click **Next**. The Ready to install OrgPublisher HTML5 dialog box appears.

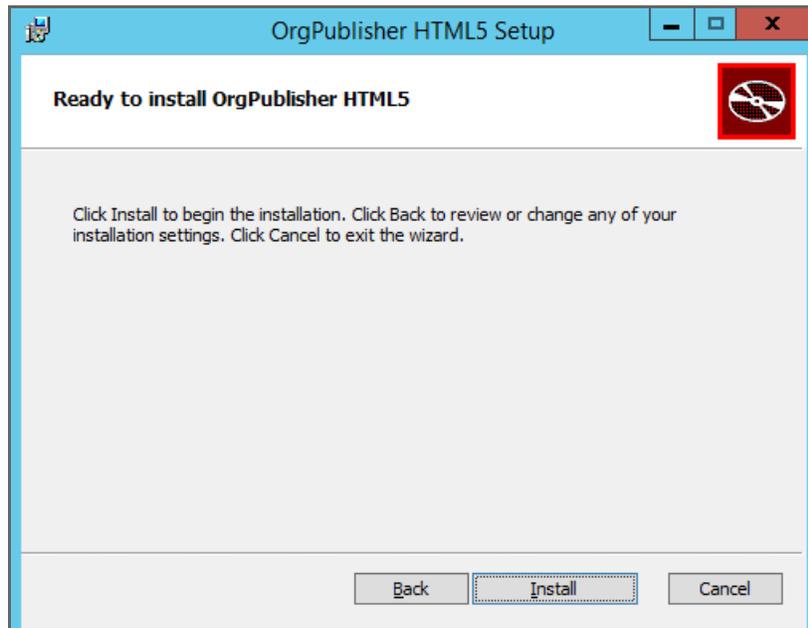


Figure 4: OrgPublisher HTML5 Setup Wizard - Ready to Install

- 6 Click **Install**. A progress dialog box opens. Once the installation is finished, the Completed dialog box appears.

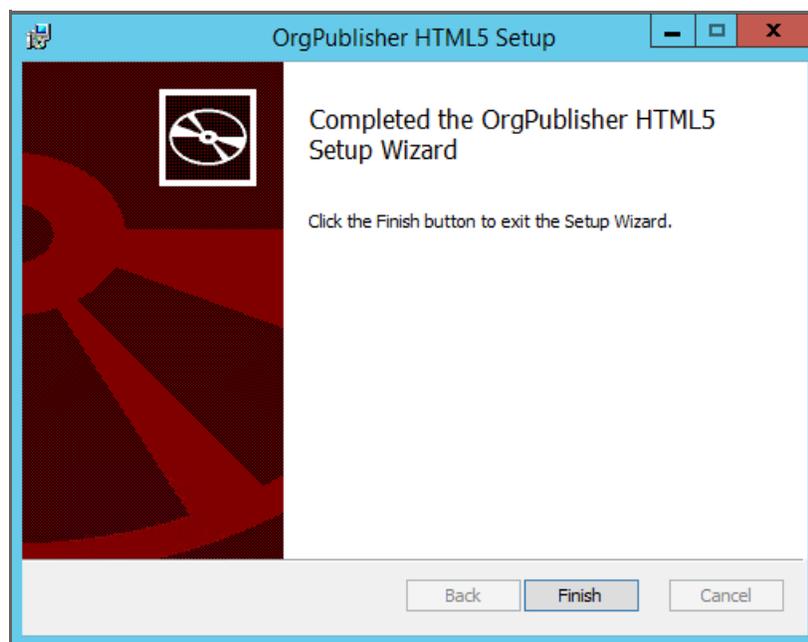


Figure 5: Completed OrgPublisher HTML5 Setup Wizard

- 7 Click **Finish**. A new directory is created that contains the PeopleFluent OrgPublisher HTML5 files. For example, in the default directory:  
**C:\Program Files (x86)\PeopleFluent\OrgPublisherHTML5**

The PeopleFluent OrgPublisher HTML5 Configuration application appears.

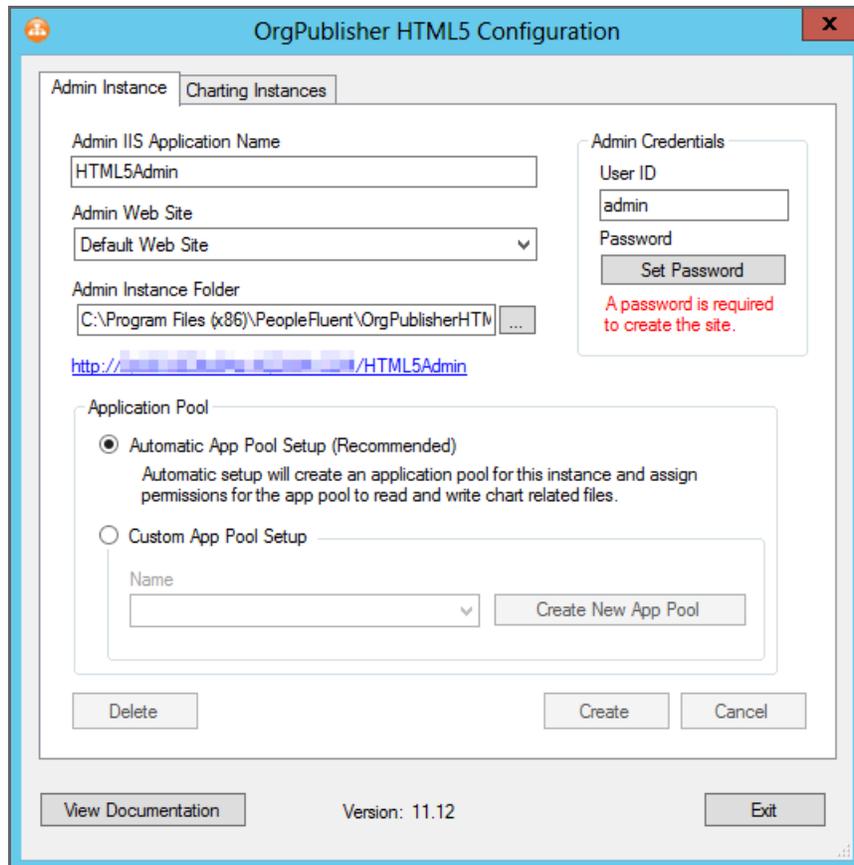


Figure 6: OrgPublisher HTML5 Configuration Application

## OrgPublisher Service

The installer creates and automatically runs a new Windows Service, called OrgPublisher Service. This service manages data sources and chart exports.

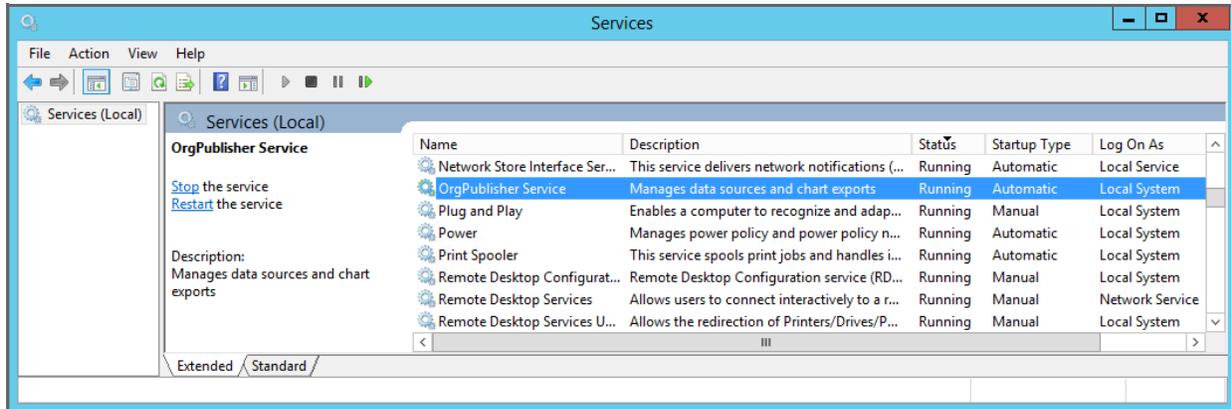


Figure 7: OrgPublisher Service

## Next Steps

The PeopleFluent PeopleFluent OrgPublisher HTML5 will be used to create HTML5 Administration Instance for the instances of the OrgPublisher HTML5 Chart Viewer. For more information, see [Chapter 3, Creating HTML5 Chart Viewer Instances on page 11](#).

## Chapter 2: Creating an HTML5 Administration Instance

The PeopleFluent OrgPublisher HTML5 allows the chart administrators to create an HTML5 Administration Instance and then manage the associated charting instances for their published HTML5 Charts.

### Creating an Administration Instance

An Administration Instance is a web application. Each Administration Instance has several parameters:

- **Admin IIS Application Name:** The name that will be used in the URL of the published charts.
- **Admin Web Site:** The web site for the Administration Instance created in Microsoft Internet Information Server (IIS). Use Microsoft IIS to define a new Web Site if that is required by your IT department.
- **Admin Instance Folder:** The file path on the hard drive that will host the application files for the Administration Instance.
- **Admin Credentials:** The user ID and password used to access the Administration Instance.
- **Application Pool:** The application pool for the Administration Instance, which is used to establish a level of isolation between the Administration Instance and instances that contain sets of HTML5 charts.
  - **Automatic App Pool Setup:** Use the default settings to configure IIS (recommended). This option creates an application pool for the Administration Instance and assigns appropriate permissions to read and write related files.
  - **Custom App Pool Setup:** Allows for the creation of a new app pool or selection of an existing app pool from the drop-down list.

 **Caution:** A custom app pool should only be used if required by an organization's IT department.

## To create the Administration Instance

- 1 **Open the PeopleFluent OrgPublisher HTML5. The OrgPublisher HTML5 Configuration window opens.**

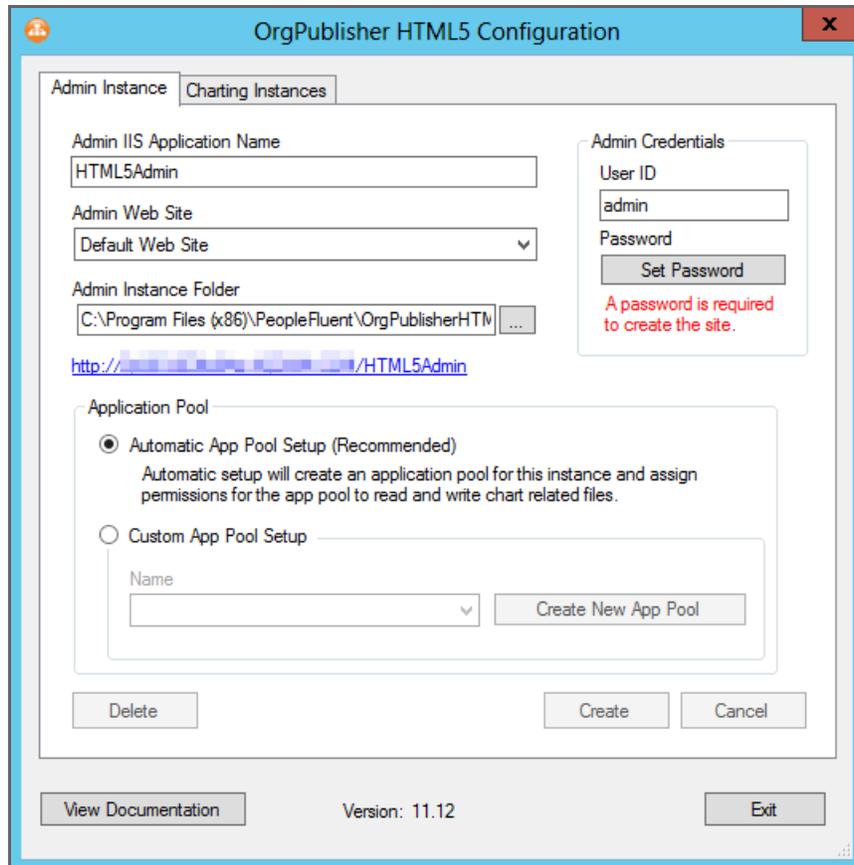


Figure 8: OrgPublisher HTML5 Configuration Application

- 2 **Optionally, modify the following:**
  - **Admin IIS Application Name**
  - **Admin Web Site**
  - **Admin Instance Folder**

- 3 In **Admin Credentials**, click **Set Password**. The **Enter password** window appears.

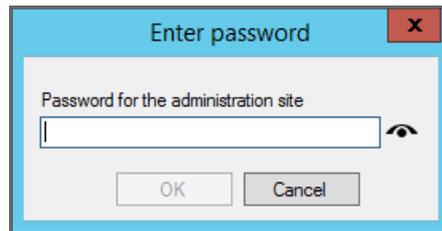


Figure 9: Enter Password

- 4 Enter a password.
  - 5 Optionally, click the **Eye** icon to the right of the field to view the password.
  - 6 Click **OK**.
  - 7 Optionally, modify the **Application Pool** settings.
- ⊘ Caution: A custom app pool should only be used if required by an organization's IT department. For more information, see [To create a custom app pool](#).
- 8 Click **Create**. A message appears confirming that the **Administration Instance site** has been created.

### To create a custom app pool

- 1 In **Application Pool**, select **Custom App Pool Setup**.
  - 2 Click **Create New App Pool**. The **Add Application Pool** dialog box appears.
  - 3 Enter a name for the new app pool.
  - 4 Click **OK**. The new app pool appears in the **Custom App Pool Setup** drop-down list.
- ⊘ Caution: The PeopleFluent OrgPublisher HTML5 Configuration Utility configures application pools it creates to set the **Enabled 32-bit applications** parameter to **False**. Custom application pools created outside of the HTML5 Configuration Utility must also have this parameter set to **False**. Otherwise, performance issues and error messages may occur.

## Next Steps

Once an **Administration Instance** has been created, administrators click **Update** if changes were made, then they are ready to configure **HTML5** charting instances.

## Chapter 3: Creating HTML5 Chart Viewer Instances

The PeopleFluent OrgPublisher HTML5 allows the chart administrators to create and configure HTML5 Chart Viewer instances. The settings to configure an instance are organized across three tabs: General, App Pool, and Security.

### Creating a Charting Instance

An instance represents a published set of charts that will share an address (URL) and security mode. Each instance has three parameters:

- **Instance Name:** The name that will be used in the URL of the published charts.
- **Web Site For Instance:** The web site for the OrgPublisher instance created in Microsoft Internet Information Server (IIS).
- **Instance Folder:** The file path on the hard drive that will host the application files for the instance.

### To create a new instance

- 1 From the Windows Desktop, open the PeopleFluent OrgPublisher HTML5 by double-clicking the **OrgPublisherConfiguration** shortcut that was created during installation.
- 2 Click **Add**. The Add Instance dialog box appears.

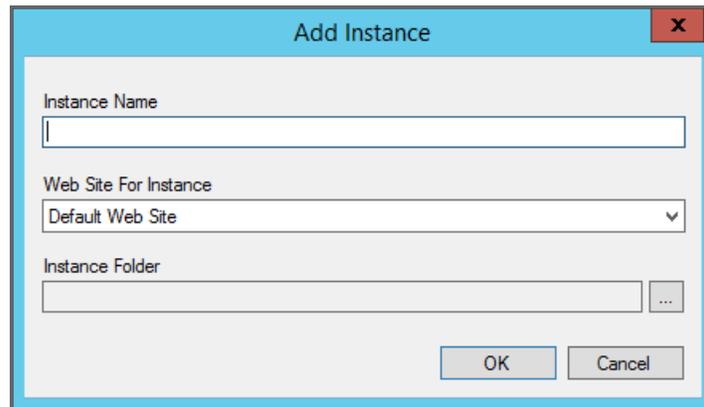


Figure 10: Add Instance

- 3 Enter an **Instance Name**. Avoid using special characters and spaces.
- 4 Select the **Web Site For Instance**. The Default Web Site is recommended for most users. Use Microsoft IIS to define a new Web Site if that is required by your IT department.
- 5 PeopleFluent recommends using the Instance Folder path automatically created by the PeopleFluent OrgPublisher HTML5 based on the Instance Name.
- 6 Click **OK**.

# Configure a Charting Instance

After creating an OrgPublisher HTML5 instance, an administrator then configures the instance via settings on the General, App Pool, and Security tabs.

## General

The General tab allows administrators to set the publish location, instance-specific display options, and log level.

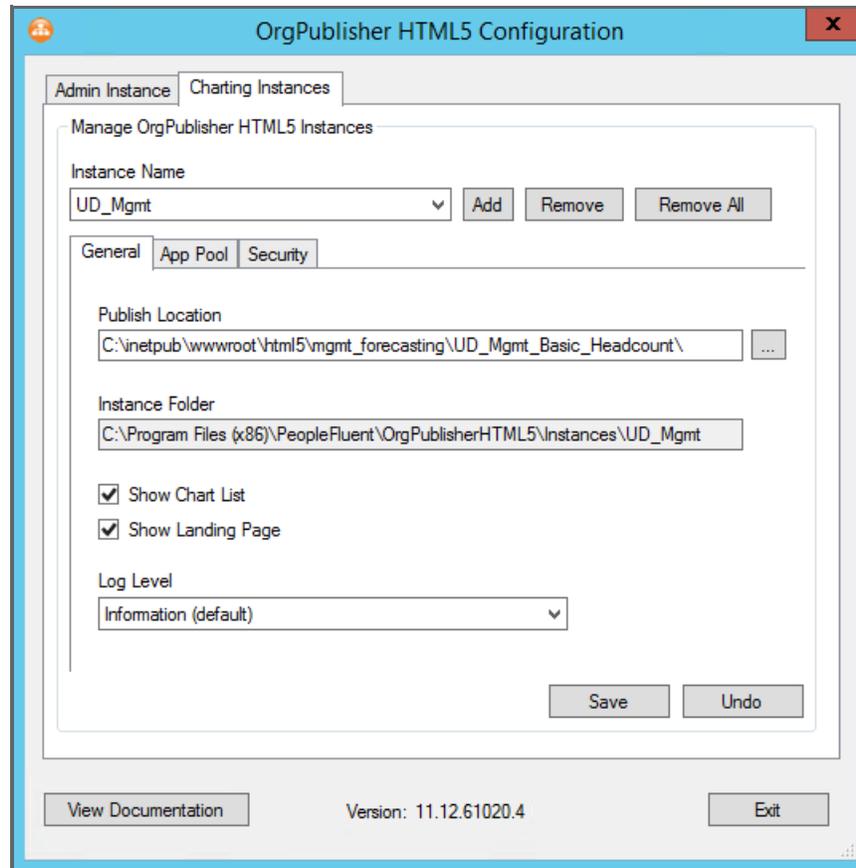


Figure 11: General Tab

- **Publish Location:** The file path to the directory on the web server where the administrator published the HTML5 chart with the PeopleFluent OrgPublisher HTML5 desktop application. The OrgPublisher HTML5 Summary dialog box provided the administrator the option to use the clipboard, so it may be pasted if available.



**Warning: Do not point multiple chart instances to the same Publish Location because chart configuration data may be overwritten.**

- **Instance Folder:** This read-only field displays the file path for the directory that will host the application file for the instance. The default location is: C:\Program Files (x86)\PeopleFluent\OrgPublisherHTML5\Instances\*instance\_name*.
- **Show Chart List:** When selected, the OrgPublisher HTML5 Chart Viewer displays a list of charts found in the Data folder in the Publish location. This list appears in the toolbar on the far left side of the application. This option is enabled by default.

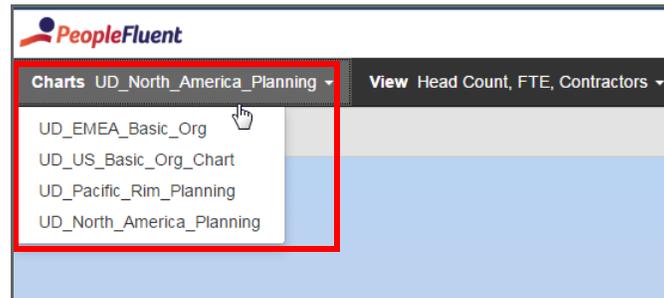


Figure 12: Chart List

- **Show Landing Page:** When selected, a landing page displays a list of available charts, similar to the list from the Show Chart List option, but allows the user to select a chart. This option is not enabled by default and the page is not configurable. To access a landing page, go to: [http://server\\_name/instance\\_name/](http://server_name/instance_name/)

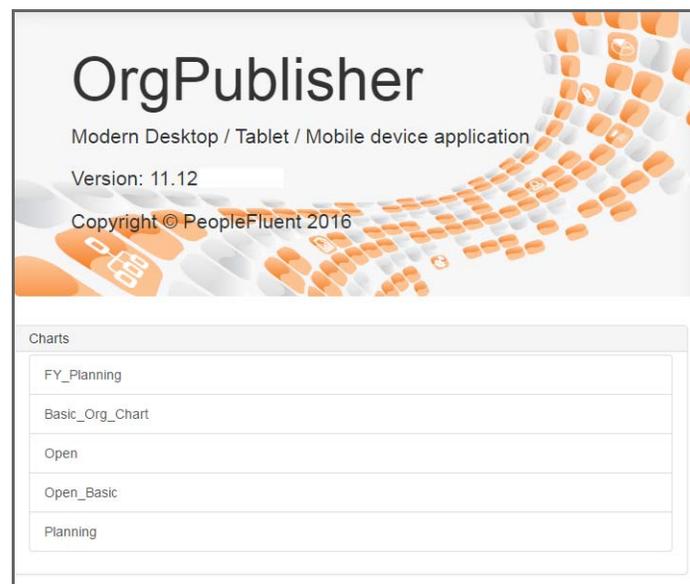


Figure 13: Landing Page

- **Log Level:** Sets the amount and type of information that is captured in the application log file without affecting its functionality. The Information (default) level should be adequate unless a PeopleFluent support representative recommends changing it.

## App Pool

OrgPublisher uses application pools to establish a level of isolation between instances that contain sets of HTML5 charts. For example, one app pool could be used for an instance with unsecured charts which allow all employees access where another app pool could be used for an instance with secured charts intended for a specific group of users such as the Executive team.

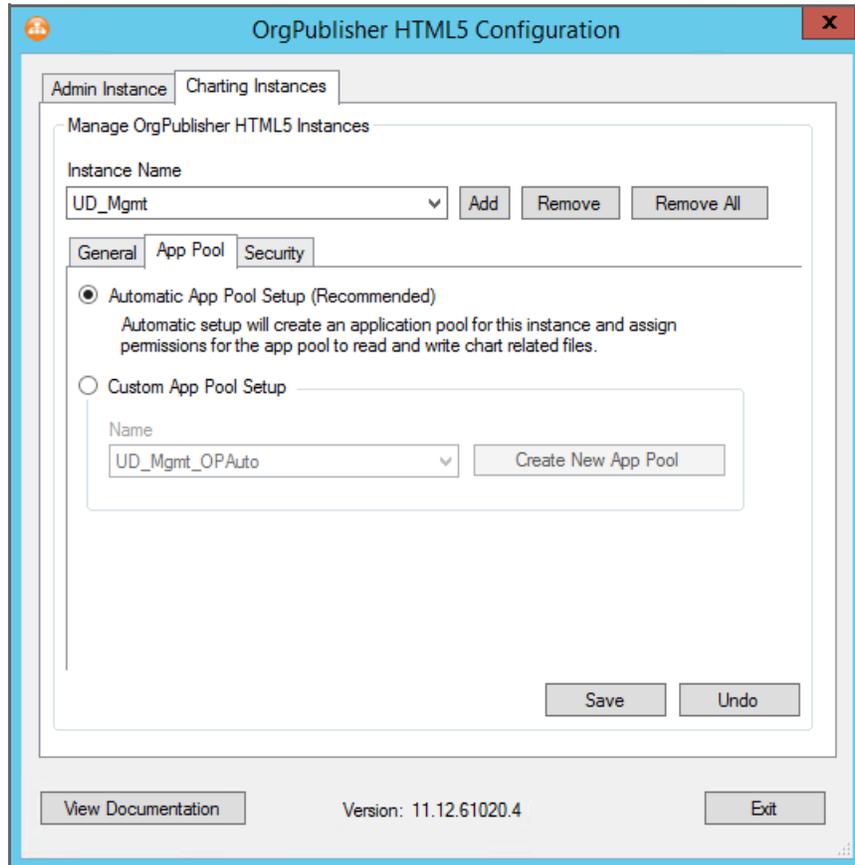


Figure 14: App Pool Tab

- **Automatic App Pool Setup:** Use the default settings to configure IIS (recommended). This option creates an application pool for this instance and assigns permissions to read and write chart- and viewer-related files.
- **Custom App Pool Setup:** Allows for the creation of a new app pool or selection of an existing app pool from the drop-down list.

⊘ Caution: A custom app pool should only be used if required by an organization's IT department.

### To create a custom app pool

- 1 On the App Pool tab, select **Custom App Pool Setup**.
- 2 Click **Create New App Pool**. The Add Application Pool dialog box appears.
- 3 Enter a name for the new app pool.
- 4 Click **OK**. The new app pool appears in the Custom App Pool Setup drop-down list.

 Caution: The PeopleFluent OrgPublisher HTML5 Configuration Utility automatically configures application pools to set the **Enabled 32-bit applications** parameter to **False**. Custom application pools created outside of the Configuration Utility must also have this parameter set to **False**. Otherwise, performance issues and error messages may occur.

## Security

The **Security** tab allows administrators to configure security for all charts published within an instance:

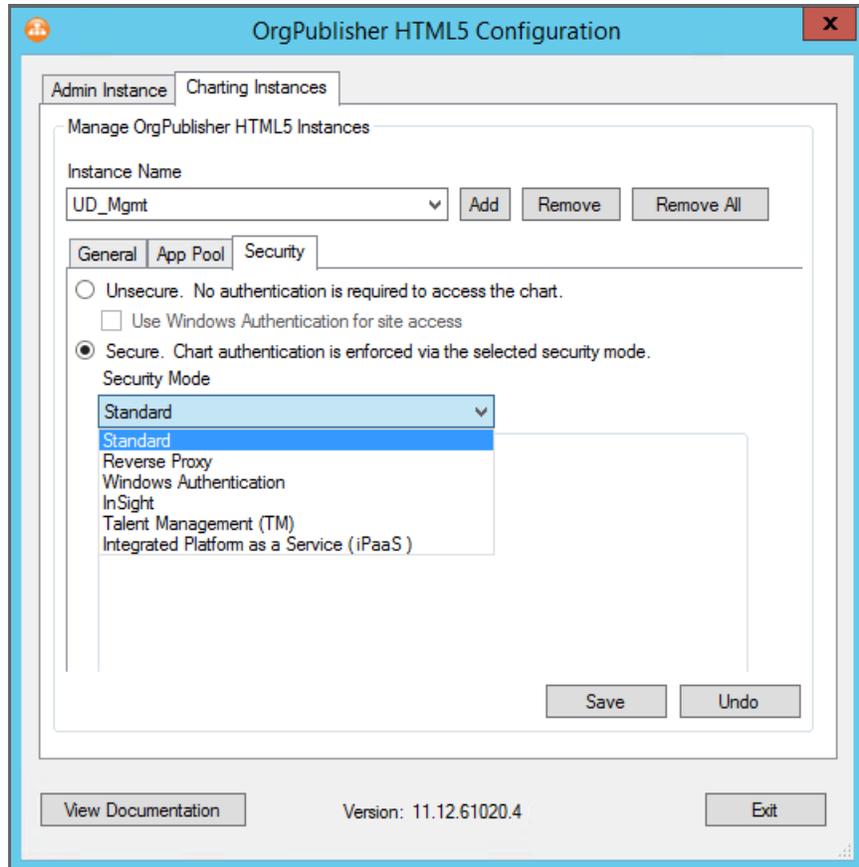


Figure 15: Security Tab

- **Unsecure:** Allows access to charts without user authentication. This is the default setting.

**i** Note: Select **Unsecure** to use Windows Authentication for site access if using unsecured charts but securing access to the charts via Windows Authentication. For more information, see these two links:

- **Windows Authentication**  
<https://docs.microsoft.com/en-us/iis/configuration/system.webServer/security/authentication/windowsAuthentication/>
- **ASP.NET Authorization**  
<https://msdn.microsoft.com/en-us/library/wce3kxhd.aspx>

- **Secure:** Allows access to charts only with authentication using the selected Security Mode. For more information, see [Security Modes on page 18](#).

⊘ Caution: The security type selected here must be compatible with the security type of the HTML5 chart published using the OrgPublisher desktop application.

## Security Modes

If Secure is selected, then an administrator must choose one of the following security modes for the HTML5 Chart Viewer instance:

- **Standard:** Requires no additional settings.
- **Reverse Proxy**

⊘ Caution: The following settings must be the same values as those the administrator set when publishing the HTML5 chart in OrgPublisher's Reverse Proxy Settings.

- **Header Value: (Required)** Contains the name of the HTTP header item that will contain the User ID expected by the OrgPublisher HTML5 Chart Viewer.
- **Store as a cookie:** Allows for the header value to be stored as a cookie in the user's browser.



The screenshot shows a configuration window titled "Security Mode". At the top, there is a dropdown menu with "Reverse Proxy" selected. Below this, there is a section labeled "Header Value" with an empty text input field. At the bottom of the window, there is a checkbox labeled "Store as a cookie" which is currently unchecked.

Figure 16: Security Mode: Reverse Proxy

- **Windows Authentication**

⊘ Caution: The following settings must be the same values as those the administrator set when publishing the HTML5 chart in OrgPublisher's Windows (Active Directory) Authentication.

- **User ID Format: (Required) Supports the following formats:**

- User ID only (Default)
- Domain\User ID
- domain.company.com\User ID



Figure 17: Security Mode: Windows Authentication

The following security modes are for use by PeopleFluent personnel:

- **InSight**
- **Talent Management**
- **Integrated Platform as a Service (iPaaS)**

For more information about these options, contact your PeopleFluent representative.

## Next Steps

Once administrators have created an HTML5 Chart Viewer instance, they can click **Save** and then they are ready to configure HTML5 charts published in that instance using the HTML5 Administration site. To access the site, click the link on the Admin Instances tab.

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