

# **OrgPublisher Executive End User Installation Guide**

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# Installing OrgPublisher Executive on the iPad

You can download OrgPublisher Executive from the App Store at any time.

1. Open your browser and go to the Apple store web page and type **OrgPublisher Executive** in the search field.
2. When the search results return the OrgPublisher Executive application, click **INSTALL APP**. You must have Apple iTunes installed on the tablet in order to download the free OrgPublisher Executive application.
3. Once installation is complete, click **OPEN**. OrgPublisher Executive opens to the Settings dialog.

Settings for OrgPublisher Executive must be configured before you can sign in, sync data, or open your HR data. You can, however, view the Demo before configuring your iPad settings.

## Configuring OrgPublisher Executive Settings on the iPad

The Settings dialog can be accessed from the OrgPublisher Executive Home page after you have successfully installed the application.



**Figure 1.**

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1. Click the Settings button  in the upper-right corner of the page.  
The OrgPublisher Executive Settings dialog opens.



**Figure 2.**

2. If you are a hosted customer, verify that the hosted button in the upper-right corner is set to **ON**, and type your **Company ID** as provided by your administrator. (The Company ID is determined during the implementation process.)



**Figure 3.**

If you are not a hosted customer, verify that the hosted button in the upper-right corner is set to **OFF**.

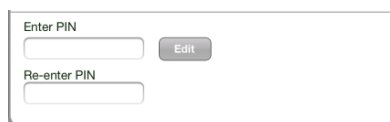


**Figure 4.**

On premise is the option you want to use when you are accessing data through a “customized domain,” whether that domain is on premise or is a non-standard hosted URL.

Other settings options can include:

**Entering a PIN**



**Figure 5.**

**Note:** The end user is responsible for creating and maintaining the PIN number. If lost, the OrgPublisher Executive settings must be reset and a new PIN number used.

Once the PIN is entered in the Settings dialog, it must be entered on the Home page every time OrgPublisher Executive is accessed. The keypad automatically displays at the bottom of the page.



**Figure 6.**

### Entering a User Name and Password

The User Name and Password are taken from selected fields in the OrgPublisher data file. The Settings dialog provides a **Remember password** button to allow end users to cache their password, so it is automatically called after entering the **User Name** on the Home page.



**Figure 7.**



**Figure 8.**

If the “caching” is enabled, the keypad automatically displays at the bottom of the Home page to enable typing of the password.

### Logging in to a Proxy Server

If OrgPublisher Executive is set up to use a proxy server, the following dialog opens. Type your Login name and Password, then click Login. The keypad automatically opens at the bottom of the Home page.




**Figure 9.**

## Opening Employee Data in OrgPublisher Executive

Once OrgPublisher Executive has been configured, you can access your HR data.

Type the URL to your chart data and click the green Verify Server button

 to the right of the ID field to verify the link.

https://companyid.peoplefluent.com/companyid/service/opeservice.svc

OR

http://YourServerName/OPE/service/opeservice.svc

If the connection is successful, a check mark appears to the right of the URL in the dialog.





**Figure 1.**

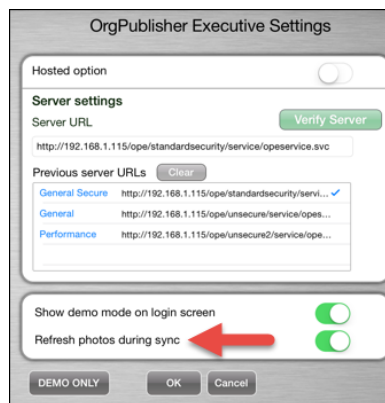
The **Previous server URLs** section can now display the publishing description for easier identification.



## iPad Sync Process

The **iPad end user** performs the data sync, either at fixed intervals or when notified to do so on the home page. If the **Sign In** option is not enabled on the Home page, then a **Sync** is required. The sync notice appears below the  button when opening OrgPublisher Executive.

In addition, the iPad user can now open the Settings  dialog and decide whether or not to **Refresh photos during sync** by turning that option on or off.



**Figure 2.**

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# Accessing OrgPublisher Executive Quick Start Guide

Click the Help button in the toolbar.

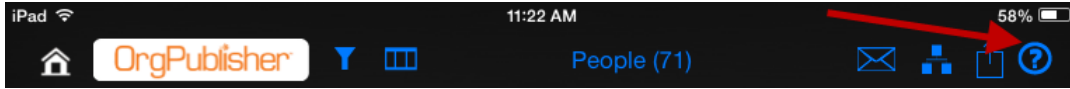


Figure 3.

The first page provides an overview of OrgPublisher Executive features.

## OrgPublisher Executive Quick Start Guide

Explore the Interface

- 1 Home Screen**  
Tap here to return to the home screen.
- 2 Search Bar**  
Search by name for a specific person.
- 3 Categorize By**  
Tap here to organize your view with a variety of categories.
- 4 Action Menu**  
Tap to send an email to all employees in your current view. Tap to access team view. Tap to export a list of employees to email or send feedback. Tap for help.
- 5 Filter Options**  
You can use multiple filters at once, and filters persist through all the views. Tap [Clear Filters](#) to clear the filters.
- 6 Boxes/Photos**  
Swipe up and down to view the people in your organization. The view changes dynamically based on your filtering and Categorize By criteria.
- 7 Talent Card**  
Tap a box to see work information and other professional details. Tap to send an email to the selected person.
- 8 View Options**  
Tap for People, List, Analytics, and Map views.

OrgPublisher Executive App v11.7.0
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Figure 4.

The second page provides tips on how to navigate in OrgPublisher Executive.

## Learn the Basic Actions



Tap an Analytics graph to open a view of people in each category.



When viewing your hierarchy, tap here to move up in the hierarchy. Tap the icon below a person with reports to drill down into the hierarchy.



You can rotate your iPad and use the app in portrait mode. To access filters in portrait mode, tap at the top of the screen.



Drag or swipe up and down to scroll through the information.



Locations view shows the company population on a map. Tap a number to see the specific results.



List view allows you to tap the arrows to scroll and see additional information.

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**Figure 5.**

For help troubleshooting problems viewing a chart, please contact [customer support](#).