



# OrgPublisher<sup>™</sup> 11 PREMIER



Automatic Organizational Charting and Workforce Reporting



# ORGPUBLISHER GETTING STARTED GUIDE

## How to Use This Guide

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This guide will help you quickly become familiar with the basic capabilities of OrgPublisher. By reviewing the five main sections of this guide, you will learn the key concepts that will help you to get the most out of your initial OrgPublisher experience.

You can follow this guide chronologically, or you can link to a specific topic listed below. Topics include:

[Product Overview](#)

[Installation](#)

[Exploring the Samples](#)

[Creating Your First Chart](#)

[Getting Additional Help](#)

## Product Overview

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OrgPublisher is offered as an on-premise application or a hosted option. OrgPublisher delivers web-based robust org charting tools, visual workforce reports, self-service analytics, and powerful organizational modeling and succession planning tools.

To best understand OrgPublisher, let's first analyze what the product can do:

### ***Core Org Charting Capabilities***

- **Prebuilt Reports** provide chart designs based on your selection for the type of data you want to emphasize in your chart. This option requires that your data conform to the Universal File Layout.
- **Automated Org Charting** draws charts automatically, based on your data. Charts can be set to refresh automatically.
- **Intelligent charting** options provide robust support for multiple reporting relationships including person-to-person, position-to-position, and matrix (indirect) reporting relationships.
- **Configurable styles** allow different views using the same source of information; for example, open positions can be viewed as job postings. You can also show or hide different types of information in a

view that focuses on head counts, or you can create a view that displays military information. In addition, you can use tabs in the style bar to display names of available styles.

- **Innovative OrgHistory** archiving and chart comparison capabilities deliver unique organizational auditing abilities.
- **Flexible printing** capabilities offer extremely adaptable and powerful printing options, including wall chart and book style printing.
- **Seamless integration** transfers information to Microsoft® PowerPoint, Microsoft® Excel, and Adobe® Acrobat® PDF.
- **Numerous browser-based viewing and administration options** include thin-client (zero client-install), rich-client (active-x plug-in), Microsoft Silverlight (cross-browser), and HTML5 (cross-browser).

### ***Innovative Analysis and Modeling Features***

- **Self-service search and reporting** capabilities provide users with access to predefined queries along with powerful ad hoc search tools.
- **Workforce analytics** are delivered with an integrated summary engine to help tabulate organizational statistics and display in bar graph or pie chart format.
- **Extensive formatting** capabilities provides the ultimate flexibility to display workforce information including succession planning, EEOC analysis, skills inventory, compliance reporting, etc.
- **Integrated corporate directories** can be automatically created and distributed for simple access across the enterprise.

**Note:** *In addition, you can review the **New OrgPublisher Features** topic in the application help file for more product features. Select **Help** from the main menu the **User manual**.*

### **Primary Roles in OrgPublisher**

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Now that you understand what OrgPublisher can do, let's focus on the three different types of OrgPublisher users and how they typically work with the software.

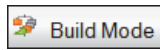
- **Administrators** create, format, secure, and publish various types of charts, reports, and directories. The OrgPublisher application is typically installed on the chart administrator's PC for this purpose. A Web Administration console, a secured server install that can be accessed, the same as any web page, from any PC, is also available for distributed administration.

- **End Users** access the published charts, reports, and directories using web-based viewing solutions (such as your company intranet) or off-line options (such as Adobe PDF, Microsoft PowerPoint, or Microsoft Excel).

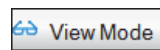
## Key Elements

Before we install the software, let's review the various modes and views in OrgPublisher.

- *Build Mode vs View Mode* - If you are an administrator, you'll need to be aware of this. OrgPublisher operates in either *Build Mode*








Build Mode


or *View Mode*

View Mode

. You use *Build Mode* to create, edit, and reorganize data. You use *View Mode* to format and view charts as they will be seen by your users when published.

**Note:** *When building charts from data, remember that any editing of data or hierarchical structure made using Build Mode **will be lost** when your chart is refreshed.*

- Views - the user interface within OrgPublisher displays smaller windows called views. You can also maximize views, displaying less of the chart and more of, for instance, the individual profile or summary graph.
- The *9 Box Matrix View*  allows you to compile the top performers and high potential employees in preparation for succession planning.
- The *Chart View* is the main window and contains the chart components arranged in boxes.
- The *Hover Profile* allows users to quickly view key custom fields just by letting the cursor hover over a box component.
- The *Tree View*  arranges data hierarchy in an outline format.
- The *List View*  can be used as a telephone listing, and includes a *Search View* that enables end users to search for and save their own groups.
- The *Profile View*  can provide employee job or box profiles containing information you may not want to display in the chart box.
- Side-by-Side Profiles can be used to build groups in conjunction with the 9 Box Matrix or search results.
- The *Filter View (formerly the Groups View)* lists all groups in the current style.
- The *Summary View*  provides totals and calculated summary totals by position type and group.

- Workforce Analysis Graphs, part of the Summary View, allow you to present your data as pie charts, horizontal bar charts, or vertical bar charts.
- The *Styles View*  displays a list of available styles within the current chart. You can also use tabs to display style names.

Now that you've covered this material, you are ready to install OrgPublisher.

## Installation

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### Server System Requirements

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Before installing OrgPublisher, verify that you meet the minimum requirements for publishing and viewing a chart. See the [System and Hardware Requirements](#) document if you plan to create and publish charts other than the basic sample in this document.

**Note:** *If you plan to publish extremely large charts or schedule charts to automatically publish, verify that Microsoft Task Scheduler (included in Internet Explorer 4.0 and later) is installed on your PC.*

### Installing OrgPublisher

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The activation key, required to install OrgPublisher, is included in the email you receive when you download the product from the web site. Copy the activation key to your clipboard before starting the installation.

If problems occur while installing OrgPublisher, please contact [Product Support](#).

1. If a previous version of OrgPublisher exists on the same machine, it is recommended that you uninstall it.
2. Access the OrgPublisher download page, noted above, and follow the instructions in the installation wizard.
3. Follow the dialog prompts to enter your license key, registered company name, user name, and user company.
4. Select the **OrgPublisher application** radio button. The **OrgPublisher Custom Install** is not used for this demonstration, and requires prior setup on the server.
5. Click **Next** and accept the defaults for the rest of the dialogs.

**Note:** An OrgPublisher folder is created in the **Program Files** folder in your local C drive, **C:\Program Files\OrgPubX**. In addition, the OrgPublisher folder contains several sub-folders.

6. Once installation is complete, accept the default of **Launch OrgPublisher now** and click **Finish**.

The OrgPublisher application opens and displays a list of sample charts if you wish to review them.

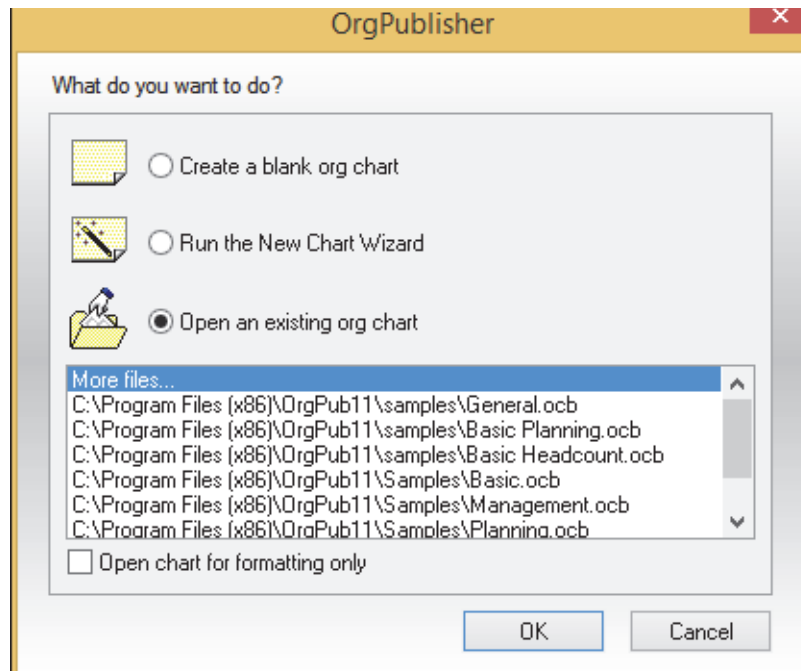


Figure 1

Your installation was successful.

## *Congratulations!*

Now you are ready to review some of the samples installed with OrgPublisher.

### ***Explanation of the OrgPublisher directory structure:***

**Note:** "X" in the following folder names indicates the OrgPublisher version number.

OrgPublisher is installed to **Program Files** folder on your local drive.

- C:\Program Files\**OrgPubX** - the OrgPublisher folder containing all application files and sub-folders
- C:\Program Files\OrgPubX\**assets**- the sub-folder containing files and graphics used with succession planning
- C:\Program Files\OrgPubX\**ChartImages** - the sub-folder containing images used when publishing to EChart thin client
- C:\Program Files\OrgPubX\**css** - the sub-folder containing cascading style sheets for thin client publishing
- C:\Program Files\OrgPubX\**images** - the sub-folder containing photos used in the sample charts
- C:\Program Files\OrgPubX\**Microsoft.VC80.CRT** - the sub-folder containing supporting Microsoft files
- C:\Program Files\OrgPubX\**OPE** - the sub-folder containing files used when you are working with OrgPublisher Executive for iPad; this folder may not be included with your installation if you did not purchase OrgPublisher Executive
- C:\Program Files\OrgPubX\**PDF** - the sub-folder containing files to support the creation of PDF documents
- C:\Program Files\OrgPubX\**samples** - the sub-folder containing the sample charts
- C:\Program Files\OrgPubX\**SAP** - the sub-folder containing documentation and files associated with OrgPublisher for *SAP® solutions*; this folder may not be included with your installation if you did not specify SAP as your data source
- C:\Program Files\OrgPubX\**SearchDictionary** - the sub-folder containing the semantic dictionary files



- C:\Program Files\OrgPubX\**Silverlight** - the sub-folder containing files resulting from publishing charts to the XAML cross browser
- C:\Program Files\OrgPubX\**Web** - the sub-folder containing files required to publish charts
- C:\Program Files\OrgPubX\**XML** - the sub-folder containing associated files to create a chart using XML

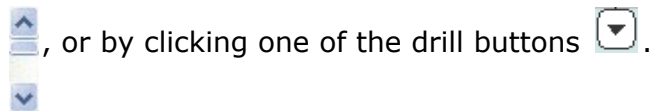
## Exploring the Samples




We suggest you take a few minutes to review the samples included with the product. It is a great way to familiarize yourself with the major areas of the product. It may also give you a few ideas on how to use the product within your organization.

Depending on the width of the screen view, you can see the OrgPublisher toolbars in either two or three rows across the top of the org chart window. This procedure assumes that you see two rows of toolbars.

## Using Sample Charts

1. Navigate through the charts by using the side or bottom scroll bar



2. Use buttons in the lower-right side of the toolbar to open additional views, such as the *Profile View*  or *Styles View* . Click the buttons again to close the views. Click the push-pin  in the upper right-hand corner of the *Styles View* to keep the view open while you work in the chart.

You can also access the *Styles View* by clicking on the current style name in the left-hand corner of the *Chart View* or by clicking a tab.

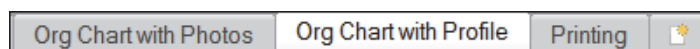
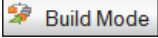
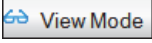












Figure 2

3. To edit the data, you must click the *Build Mode*  button in the center of the toolbar. (Normally, formatting the chart is done using *View Mode* .)  
Once in *Build Mode* you can see additional information in each box. This demonstrates how you can gather data from many areas yet display only what you want your end users to see. **However, any manual editing to hierarchical data is lost the next time the chart is refreshed.**
4. You can view a simple reporting structure hierarchy from within the chart, by selecting a chart box and clicking the Chain of Command button .
5. You can show or hide information in the chart by clicking the *Show/hide chart components*  button in the far right-hand corner of the toolbar. This opens the *Show/Hide Chart Components* dialog where you can expand the table and select fields to hide, or choose how many levels to display in the chart. You can even show or hide components only for selected groups that you may create later.
6. Click the Chart Legend Properties  button to review or create a legend to describe icons used in your chart.
7. Click the *Zoom to point* button  in the lower center of the toolbar and then click on a box in the chart. This brings the selected box to the center of the chart for better viewing. Click the *Go to top of displayed chart* button  in the lower left-hand corner of the toolbar to return to the top box of the displayed hierarchy.
8. Quickly format the chart by changing the background color, for instance, by clicking the *Change color* button  in the far right side of the toolbar. When the color grid displays click on a color box. The color grid closes and the chart background color changes.
9. Open a new chart by clicking on the *Open* button  or you can create a new chart by clicking on the *New* button  in the far-left side of the toolbar. OrgPublisher prompts you to save the current chart. You can click **Yes** to save or **No** to discard the changes made.

10. Search a chart to locate a person or to create a group, based on matching criteria. Click the *Search* button  in the main toolbar.

**Note:** You can access sample charts at any time while using OrgPublisher by clicking the *Open* button  in the left-hand side of the toolbar, and browsing to the **C:\Program Files\OrgPubX\samples** folder.

You view the samples within the desktop-based OrgPublisher application, which is the main administration console for the product. The samples open as an administrator would view them. End users typically view them from a web-browser where they are able to perform certain tasks, such as searching.

**Note:** To view the samples via web-browser, please visit the [OrgPublisher](#) page of the Web site.

### Sample charts with OrgPublisher include:


- **Basic.ocb** - The Basic samples org chart contains styles for a basic chart layout, a chart with photos, a directory view, a plain chart for easy printing, a style for contractors, and a style for open positions.
- **Basic Headcount. ocd** - The Basic Headcount sample org chart contains styles with basic headcount summaries and headcounts with the relevant manager's span of control.
- **Basic Planning.ocb** - The Basic Planning sample org chart contains styles for possible successors and a succession plan, as well as the Profile View with additional employee information.
- **General.ocb** - The General sample org chart contains styles, each one highlighting specific information, such as contact information, contractors, directory listing, open positions, and more.
- **Management.ocb** - The Management sample org chart contains styles that concentrate on head count and span of control.
- **Planning.ocb** - The Planning sample org chart provides styles with modeling scenarios for salary and head count, span of control with performance analysis, and talent review.
- **Succession.ocb** - The Succession sample org chart includes styles that demonstrate succession candidates, ratings that include potential, risk, and impact analysis, and 9 Box Matrix.

You can review descriptions of OrgPublisher file types in the OrgPublisher Help File; click **Help>User Manual**.

## Creating Your First Chart

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Creating your first chart includes several tasks. Getting your data is the first topic discussed in the following sections. The second is installing OrgPublisher to your desktop, which was discussed earlier in this document. Another task is *Formatting the Chart* before you publish it. This document will show you a quick way to accomplish these last two items.

**Note:** *When building a chart from data, you **will lose the changes** when the chart is refreshed unless you save  the edited chart.*



To successfully build org charts automatically from your human resource data, it is helpful if you have an understanding of how your company stores reporting relationships (database tables and fields). These relationships can be tracked by employee ID or position management using position codes. Knowledge of Microsoft® Windows® applications various data file types is also very helpful.

You can create a chart from virtually any data source. Follow these links for tutorials on how to:

Create a chart using [Prebuilt Reports](#) - found in the OrgPublisher Help File: click **Help>User Manual**.

Charts can be created from several formats. Details for all can be found in the OrgPublisher Help File.

- Text file
- ODBC file
- Multiple data sources
- XML file
- Oracle HMS via ODBC
- PeopleSoft HCM via ODBC
- [OrgPublisher for SAP® solutions](#) - PeopleFluent provides an SAP data extractor. Transports and documentation are located in the **C:\Program Files\OrgPubX\SAP** folder.

If you do not have access to your database or do not feel experienced enough to properly manipulate your data, you can follow the *Using Sample Data* procedure below.

## Using Sample Data

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A Microsoft Access database is included with OrgPublisher. You can utilize this sample database if Access is installed on your PC, or you can move on to the next section to create a chart [Using Your Data](#).

Once you have imported data, you should map the fields to match the OrgPublisher input file layout. In addition to standard fields, such as name, department, and position, you can map custom fields to capture pertinent data you track in your data source.

This example will map data for just a few fields.

1. Open OrgPublisher.
2. When the *OrgPublisher* list of files dialog opens, select the **Run the New Chart Wizard** radio button. Click **OK**.  
The *New Chart Wizard* opens.
3. Select the **Organizational chart** check box. Click **Next**.  
The *Select a data source* dialog opens.
4. Select the **ODBC database** button. Click **Next**.  
The *ODBC Database* dialog opens.
5. Click the down-arrow and select the **MS Access Database** option. Click **Next**.  
The *Select Database* dialog opens.
6. **Browse** to the **C:\Program Files\OrgPubX\samples** folder. Select the **PacificEastern.mdb** file. Click **OK**.
7. Under the **Select a database table, view or query** radio button, click the down-arrow and select the **PacificEastern** option. Click **Next**.  
The *Data preview* dialog opens.
8. Verify that the data is what you expect then click **Next**.
9. Accept the default radio button, **Use standard OrgPublisher field order**. Click **Next**.


10. Click the **Launch the Style Wizard** check box to clear it. Click **Finish**.

OrgPublisher displays a black and white chart with the fields you selected.

## Using Your Data

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You can create a new chart using the *New Chart Wizard*.

1. Click on the *New* button  in the upper left corner of the toolbar or select the **Run the New Chart Wizard** radio button in the *OrgPublisher* dialog. Click **OK**.  
The *New Chart Wizard* opens to the *Welcome* dialog. Click **Next**.
2. Select the button that matches your data source, such as **ODBC Database** or **XML file**.  
You can also select **Create a blank org chart** to create a chart manually.
3. Click **Next** and follow the wizard prompts, which vary depending on the type of data source you select.
4. Accept the default radio button, **Use standard OrgPublisher field order**. Click **Next**.
5. Clear the **Launch the Style Wizard** check box and click **Finish**.  
OrgPublisher displays the chart.

## Formatting the Chart

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The chart opens in the **View Mode** and you can format it before [Publishing the Chart](#). OrgPublisher provides many formatting options including powerful advanced box layout options. For this example, we will cover just basic formatting.

**Note:** *The Style Wizard automatically performs many formatting functions, such as box shapes and color.*



When working with a chart built from data, you should not manually edit data unless you save it as an **OCP** or text file because the next time you update the chart all your changes will be overwritten. When you work with the **OCP** file, however, you cannot refresh your data from your data source.


## Selecting a Chart Design Template

1. Click the *Chart Design Templates* button  in the format toolbar. The *Chart Design Templates* dialog opens.
2. Click on the design sample that best resembles what you want your chart to look like.


**Note:** You will **lose** all previous formatting when you accept a chart design template.

3. Click **OK** or **Cancel**.
4. Work with the chart design or click the *Chart Design Templates* button again to choose another preformatted design.

## Selecting Individual Format Options

1. Click inside the chart background area then click on the *Change color* button  in the far right-side of the toolbar.
2. Select a color from the color grid. The background of the chart reflects that color change.
3. If you want to change the color of the chart boxes, click inside the top box and select a color from the grid. This changes the color in all boxes in the chart.

**Note:** Boxes are formatted by position type. You can format boxes for all position types or select a specific type, such as manager. For this example, we will format all position types.

4. If you want to change the shape of the chart boxes, click inside the top box in the chart. Click on the *Format box* button  in the far right side of the toolbar.
5. When the *Format* dialog opens to the **Boxes** tab, click on the box shape in the **Value** column.
6. From the drop-down list of box shapes, select the shape you want. Click **OK**. The chart displays the boxes in the selected shape.
7. You can proceed to *Publishing the Chart* now.

## Publishing the Chart

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There are several formats you can choose when publishing your chart, as well as many different end user options. For this example, we'll choose the format most frequently used by our customers, PluginX, with fully functioning end user options.


Now that you have created your org chart, you complete the process by publishing the chart, or a portion of a chart, on your company intranet or shared drive. This enables end users to view your org chart interactively.

In order to publish a chart, you must know which publishing option you will use, for instance a graphic, PDF, OrgPublisher PluginX, HTML, EChart rich or thin client, or, if you have OrgPublisher Executive, publish to Apple iPad® mobile digital device. The format depends on the browser available to your users, and whether or not you want to, or can, install plug-ins.

See the [Apple store](#) if you are interested in publishing employee data to iPad® using OrgPublisher Premier.

Publishing as a Silverlight/HTML5, PluginX, or EChart rich client provides the richest end user interface, and requires the installation of a browser-based active-x control.

The following exercise requires the OrgPublisher PluginX be installed on your PC.

1. Click the *Publish* button  in the upper left-hand side of the toolbar to open the *Publishing Wizard*.
2. Select the **Express Mode** ratio button. Click **Next**.
3. Select the type of express publishing you want. Options include:
  - **Chart** - Publishes a chart that can be viewed with Internet Explorer.
  - **Chart with directory** - Publishes a chart that includes a directory view (telephone list) of the organization.
  - **PDF** - Publishes a chart to a PDF document.
4. Accept the default **Name of chart** for your published chart. The name can be the same as the chart name and does not need to include publishing information. The name must, however, be unique and cannot contain any special characters such as slashes (\ or /), colons (:), asterisks (\*), question marks (?), quotation marks ("), and greater than or less than symbols (< or >). The publishing definition name can be up to 255 characters. Click **Next**.



5. Accept the default **Location** or Browse to the location to save your chart file. For test purposes, this location can be your local **C:/** drive. Click **Next**.

**Note:** *OrgPublisher checks for invalid characters in this step and when you click Finish. Invalid characters are replaced with a dash (-). A message displays at the end of the wizard, and you can change the chart name to avoid the dashes.*

6. Click **Finish**. The *Publishing Summary* message displays the link, or links if you also chose to publish a **Chart with directory**, to your published chart. Click the link to preview the chart.

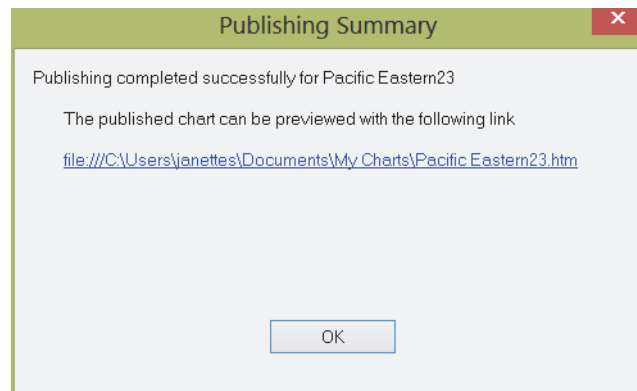


Figure 3

The Advanced Mode publishing option provides additional published chart viewing options. the application **Help File** and [OrgPublisher](#) web pages provide more detailed information on these formats.

## Getting Additional Help

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You can obtain additional details about OrgPublisher functions, technical information, or answers to your questions by utilizing the following resources.

### Online Knowledge Base

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The PeopleFluent [OrgPublisher](#) web pages contain a vast collection of tutorials, implementation documents, and general information, concerning OrgPublisher and other products.

Click [Support/Customer Care Center](#) in the main menu to open the Product Support page. From this page, you can access the Customer Care Center, as well as [Automation](#), which gives you access to APIs and sample code if you need to customize OrgPublisher. [Connector](#) tools which help you connect directly to your data source, such as PeopleSoft, Oracle HR, etc.

### User Manual and Application Help

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The OrgPublisher application contains a detailed, web-enabled *User Manual* accessed by clicking **Help** in the menu and selecting **User Manual**. In addition, the *User Manual* is available in Acrobat Adobe PDF format, and is located on the media device by which you received OrgPublisher, or you can contact Product Support.

PeopleFluent prides itself with the high quality Customer Support supplied for both evaluators and owners of the product. Complimentary support services are available during the first 30 days after purchase.

#### ***Complimentary support***

Defined as:

- Helping you locate documentation you need to answer your questions.
- Assistance in documenting feature requests and alternative solutions.
- Help in resolving product setup and OrgPublisher messages.
- Assistance in scheduling training and consulting services.

### ***Online Demonstration***

If you are just starting your evaluation, you can contact Sales at [wpa-sales@peoplefluent.com](mailto:wpa-sales@peoplefluent.com) for a product overview to provide you a quick demonstration of OrgPublisher functionality.

OrgPublisher Support is available 8:00 AM - 6:00 PM CST. Call toll-free (US and Canada): 888.ORG.CHART (888.674.2427) or 214.574.5020. You can also email Product Support at [orgpub.support@peoplefluent.com](mailto:orgpub.support@peoplefluent.com).

## **Thank You**

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We appreciate your interest in OrgPublisher and hope that this guide has been helpful.

