

# **OrgPublisher 10.1 PluginX Implementation Guide**

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## Introduction

The purpose of this document is to provide the information and instructions required to install the pluginX components necessary for:

- Viewing a PluginX or EChart Rich Client Chart
- Viewing an OrgPlan chart
- Viewing OrgPublisher Web Administration

Aquire's Customer Care Center provides more information regarding the pluginX downloads: <http://www.aquire.com/customers/support/pluginX>

### ***Role Requirements for PluginX Installation***

**Users must be an administrator on the workstation to successfully install the OrgPublisher pluginX viewers.** When implementing the pluginX for non-administrators, refer to the **Alternate Methods for PluginX Installation** section of this implementation guide.

### ***User Workstation Requirements***

#### **Viewing OrgPublisher PluginX / EChart Rich Client Charts**

- Pentium® PC compatible or greater
- Windows® XP, Windows® Vista™, or Windows 7 operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Microsoft® Internet Explorer 7 browser and later

#### **Viewing Web Administration and OrgPlan Charts**

- Pentium® PC compatible or greater
- Windows® XP, Windows® Vista™, or Windows 7 operating system
- 512 MB of RAM
- 60 MB available hard disk space
- Microsoft® Internet Explorer 7 browser and later
- Adequate storage space for charts

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# About OrgPublisher PluginX Implementation

## *Types of PluginX Viewers*

OrgPublisher's PluginX charts, EChart Rich Client charts, and OrgPublisher Web Administration use Microsoft's ActiveX technology to display the org chart in an Internet Explorer browser. The three different pluginX components are described below:

### **1. OrgPubx.ocx:**

- Standard end user pluginX viewer
- Allows end users to view org charts interactively.

### **2. OrgPlan32.ocx:**

- Required for users viewing planning charts.
- Allows planners to make changes to data in published charts that may be copied to the Planner's workstation.

### **3. OrgPub32.ocx:**

- Required for chart administrators accessing OrgPublisher Web Administration
- Allows chart administrators to create and publish charts with Web Administration.

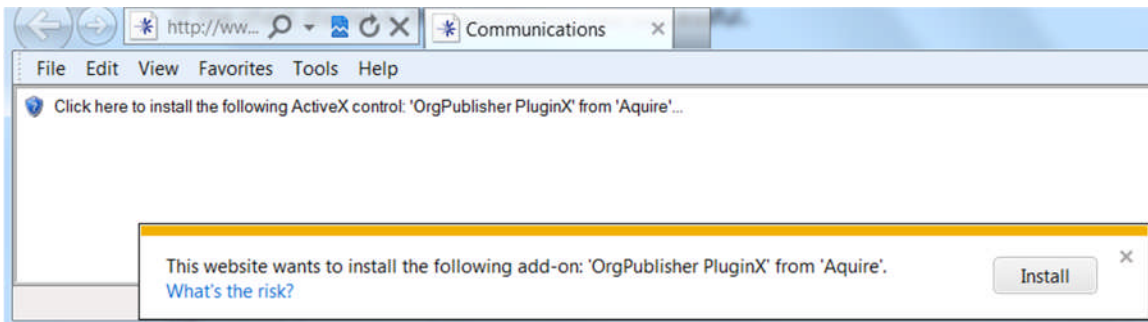
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## Installation of the PluginX

When a user clicks on a published chart link, opens a planning chart, or launches OrgPublisher Web Administration for the first time, by default, the user will automatically be prompted to install the applicable OrgPublisher pluginX viewer from the Aquire web site.

Each pluginX component (**orgpubx.ocx**, **orgplan32.ocx**, or **orgpub32.ocx**) is packaged into a signed **CABINET** file, also referred to as a **CAB** file. To successfully install the pluginX viewers, you must be an administrator on the workstation.

When clicking on the htm link, the prompt below displays. Click **Install**.



**Figure 1. PluginX Installation Prompt**

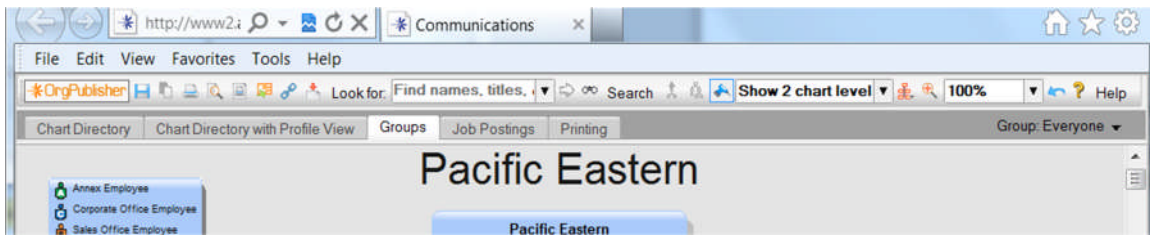
Click **Install** when the prompt, *Do you want to install this software*, displays.



**Figure 2. Install the PluginX Component**

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If the installation is successful, the page displays.



**Figure 3. Page Displays in Internet Explorer**

**Note:** If you are unable to display the page, this indicates you are not an administrator on the workstation or IT group policy restricts the download of ActiveX content, and you will need the assistance of the IT department to implement the pluginX component.

**A successful pluginX installation includes:**

- 1. Installation of the OCX (pluginX) file in the following directory:**
  - **32 bit machines:** C:\Windows\System32
  - **64 bit machines:** C:\Windows\SysWOW64
- 2. Registration of the OCX (pluginX) file in the computer’s registry.**
  - The PluginX needs to be registered in order for a chart to load.
  - When an ActiveX control is registered for the first time, certain keys are written in the registry within **HKEY\_CLASSES\_ROOT**.

**Note:** This level of permissions is too broad for many organizations. Organizations wishing to “lock down” the desktop, and thus control what is installed on a workstation, will prevent the ActiveX control from registering. To use other methods to distribute the pluginX, please refer to the Alternate Methods for PluginX Installation section.

Aquire’s Customer Care Center has an OrgPublisher Client Suite download that contains all 3 pluginX files: <http://www.aquire.com/customers/support/pluginX>

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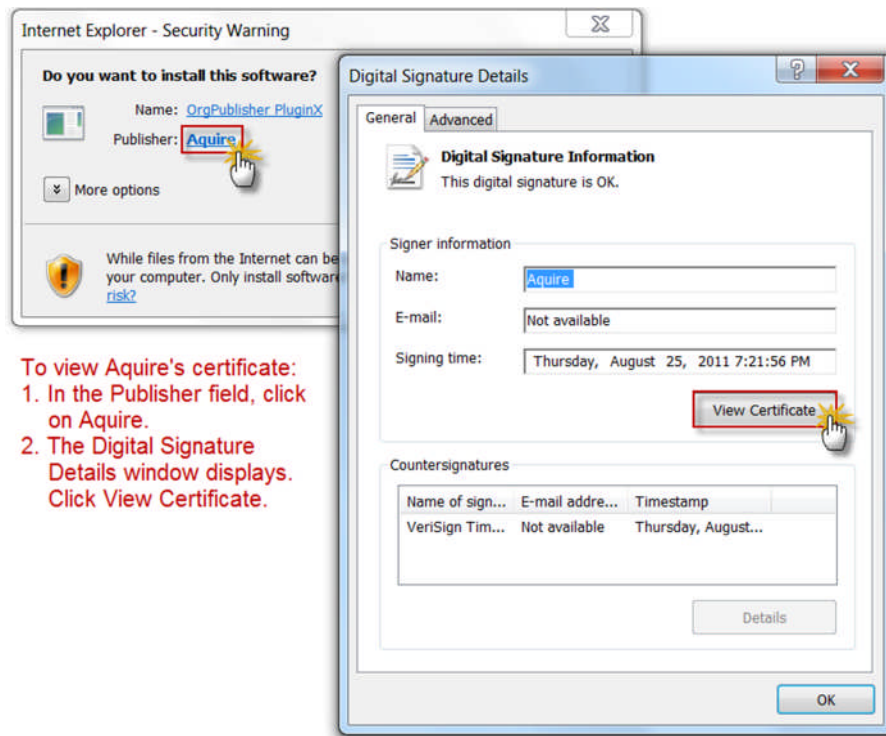
## Aquire's PluginX Certificate

Aquire's pluginX downloads have a digital signature in order to verify:

- Aquire is the software publisher of the pluginX file
- The pluginX cabinet file has not been altered following its publication

To check the certificate associated with the pluginX component when downloading the cabinet file:

1. Click on **Aquire** in the Publisher field.
2. The Digital Signature Details window opens. Then, click **View Certificate**.



**Figure 4. View Aquire's PluginX Certificate**

To address questions regarding Aquire's pluginX certificates, please contact [support@acquire.com](mailto:support@acquire.com).

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## PluginX Versions

The pluginX component should mirror the version of the OrgPublisher application being used to publish charts.

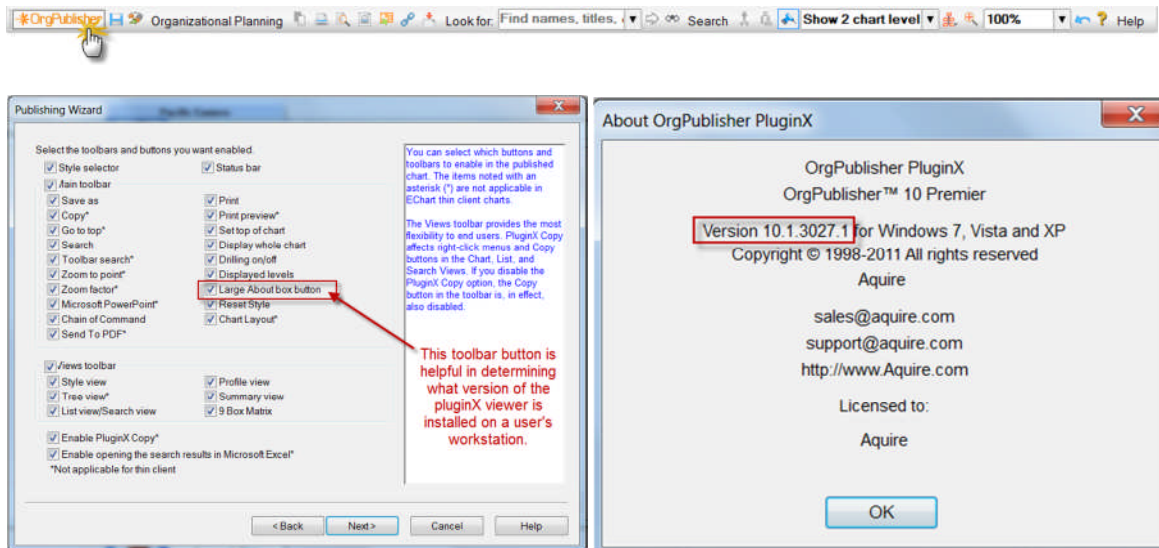
Each time you upgrade the OrgPublisher application, the matching version of the pluginX component will need to be installed on end users' workstations.

To check the full version of the OrgPublisher application, go to Help -> About OrgPublisher.



**Figure 5. About OrgPublisher**

It is recommended that chart administrators enable the Large About box button in the publishing definition (shown below). This button allows users to check the version of the pluginX viewer installed on the workstation. This information can be valuable if troubleshooting is required within a published chart file.



**Figure 6. Large About Box Button**

Viewing a chart with a pluginX viewer that does not match the version used for publishing is not recommended. This can cause unexpected performance issues due to differences in version functionality and should be avoided.

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# Publishing PluginX Charts

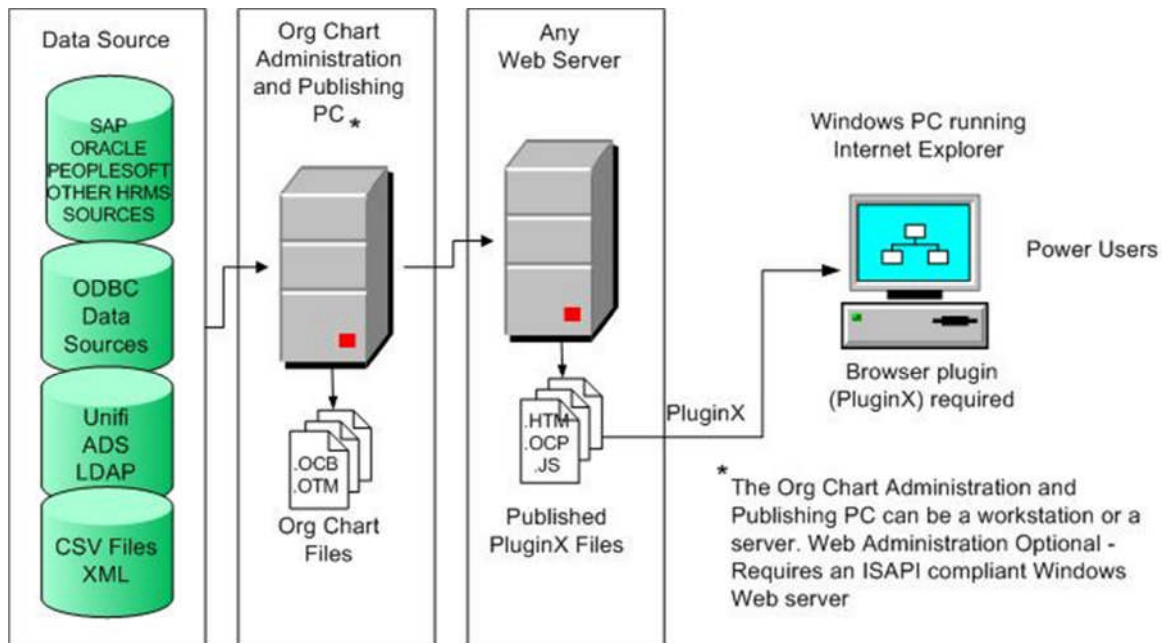
When a chart is published using the PluginX option, the following files are produced:

PluginX Published Chart Files	
File Type	Description
.JS File	<ul style="list-style-type: none"> <li>Contains a code base statement with the version of the pluginX file needed to view the chart file.</li> <li>Example of the code base statement:  <b>Version 10</b>  ('codebase="http://www.aquire.com/<b>codebase10</b>/OrgPubX.cab#Version=<b>10,0,2800,1</b>");  <b>Version 10.1</b>  ('codebase="http://www.aquire.com/<b>codebase101</b>/OrgPubX.cab#Version=<b>10,1,3027,1</b>");</li> </ul>
.OCP File	<ul style="list-style-type: none"> <li>This is a static file that takes a "snapshot" of the chart at the time of publishing.</li> </ul>
.HTM File	<ul style="list-style-type: none"> <li>The HTM file checks for several factors, including: <ul style="list-style-type: none"> <li>Internet Explorer browser requirement</li> <li>It calls the <b>JS</b> file, checks the codebase statement, and process the following logic: <ul style="list-style-type: none"> <li>✓ If the PluginX is not registered, a new CAB file is downloaded using the codebase URL.</li> <li>✓ If the PluginX is registered, then the codebase function compares the version number that is registered with the version number in the codebase statement.</li> <li>✓ If the codebase statement version number is greater than the registered PluginX, then a new CAB file is downloaded using the codebase URL.</li> <li>✓ If the codebase statement is the same or less than the registered PluginX, then the chart is loaded using the existing, registered PluginX.</li> </ul> </li> </ul> </li> </ul>

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## PluginX Publishing & Architecture

PluginX provides end users with a rich interactive experience, allowing them to navigate and search the chart, create their own groups, access hotspot links, and provide accessibility to the visually impaired. PluginX provides chart level Password Security and is a publishing option when organizations charting less than 5,000 records.



**Figure 7. PluginX Architecture**

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# Publishing EChart Rich Client Charts

When a chart is published using the EChart Rich publishing option, the following files are produced:

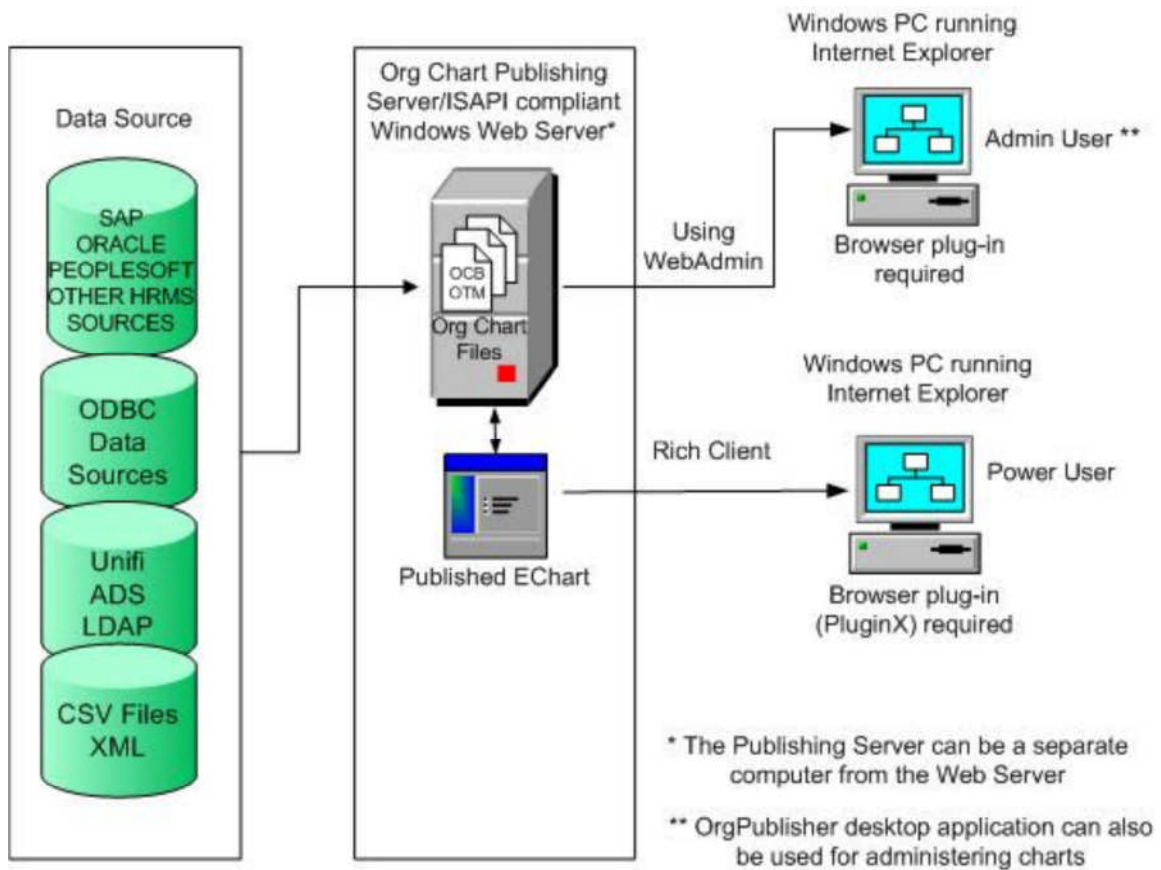
EChart Rich Client Published Chart Files	
File Type	Description
.JS File	<ul style="list-style-type: none"> <li>Contains a code base statement with the version of the pluginX file needed to view the chart file.</li> <li>Example of the code base statement:  <b>Version 10</b>  ('codebase="http://www.aquire.com/<b>codebase10</b>/OrgPubX.cab#Version=<b>10,0,2800,1</b>"');  <b>Version 10.1</b>  ('codebase="http://www.aquire.com/<b>codebase101</b>/OrgPubX.cab#Version=<b>10,1,3027,1</b>"'); </li> </ul>
.OCP File	<ul style="list-style-type: none"> <li>This is a static file that takes a "snapshot" of the chart at the time of publishing.</li> </ul>
.HTM File	<ul style="list-style-type: none"> <li>The HTM file checks for several factors, including: <ul style="list-style-type: none"> <li>Internet Explorer browser requirement</li> <li>It calls the <b>JS</b> file, checks the codebase statement, and process the following logic: <ul style="list-style-type: none"> <li>✓ If the PluginX is not registered, a new CAB file is downloaded using the codebase URL.</li> <li>✓ If the PluginX is registered, then the codebase function compares the version number that is registered with the version number in the codebase statement.</li> <li>✓ If the codebase statement version number is greater than the registered PluginX, then a new CAB file is downloaded using the codebase URL.</li> <li>✓ If the codebase statement is the same or less than the registered PluginX, then the chart is loaded using the existing, registered PluginX.</li> </ul> </li> </ul> </li> </ul>
.DLL File	<ul style="list-style-type: none"> <li>The DLL file is the executable file that enables enhanced performance and security for the chart</li> </ul>
.OCS File	<ul style="list-style-type: none"> <li>The OCS file contains chart data.</li> </ul>
.BAT File	<ul style="list-style-type: none"> <li>The BAT file is the file that is scheduled to run automated publishing jobs.</li> </ul>

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## EChart Rich Client Publishing & Architecture

EChart Rich Client is recommended for large charts with more than 5,000 records or when using OrgPublisher advanced security options. It provides fast performance for medium to very large charts and provides field level security and Microsoft® Active Directory authentication.

It is intended for end power users and end standard users.



**Figure 8. EChart Rich Client Architecture**

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# Alternate Methods for PluginX Installation

The pluginX is set up to automatically download from Aquire's web site when a user clicks on the .htm chart link. However, when users are not administrators on the workstation or when IT security policy restricts downloads of the pluginX files, alternate methods to distribute the pluginX are available including:

1. Distributing the pluginX automatically using the same tools used for distributing Windows updates.
2. Placing the pluginX cabinet file on the local intranet site and modifying the JavaScript or JS file to download from an internal URL rather than the default Aquire site.
3. Aquire also has MSI scripts to help with pushing out the pluginX to end users that are available upon request.

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## Distributing the PluginX Automatically with Internal Tools

The IT department can distribute the pluginX automatically using the same tools used for distributing Windows updates with the directions below:

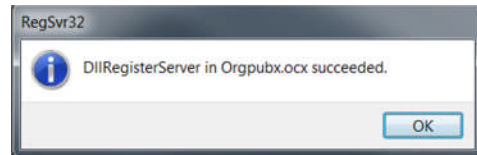
This information is intended for the experienced Script developer. Please contact your Web Administrator if you need assistance.

1. The administrator must login and open an org chart within an Internet Explorer 7 browser or later.
2. If prompted, allow the CAB file to download and install the PluginX. Once loaded, it stays loaded for all users of that computer.
3. Run an automated process that "pushes" (copies) the PluginX file (**OrgPubX.ocx, OrgPlan32.ocx, or OrgPub32.ocx**) to the user's computer (C:\Windows\System32 for **32 bit machines** or C:\Windows\SysWOW64 on **64 bit machines**)

4. Manually register the pluginX file:

**Run cmd.exe** to open the command prompt:

- **For 32 bit machines:**  
 Enter: cd C:\Windows\System32  
 Then enter: **Regsvr32 OrgPubX.ocx**
- **For 64 bit machines:**  
 Enter: cd C:\Windows\SysWOW64  
 Then enter: **Regsvr32 OrgPubX.ocx**



**Figure 9. Registration Successful**

**Note:** Regsvr32 OrgPubX.ocx will need to be modified to Regsvr32 OrgPlan32.ocx when registering the planning pluginX or Regsvr32 OrgPub32.ocx when registering the web administration pluginX.

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## Redirect Users to Download from an Intranet Location

When installing the pluginX component, by default, users are directed to the Aquire Web Site to download the CAB file. However, if preferred, you can redirect users accessing a published chart to download the pluginX cabinet file from an intranet location.

This information is intended for the experienced Script developer. Please contact your Web Administrator if you need assistance.

1. An Administrator must download the OrgPublisher PluginX Cabinet (CAB) file from the Aquire web site. *Pick the version that applies.*

**Version 10 CAB File:**

<http://www.aquire.com/codebase10/OrgPubX.cab#Version=10,0,2800,1>

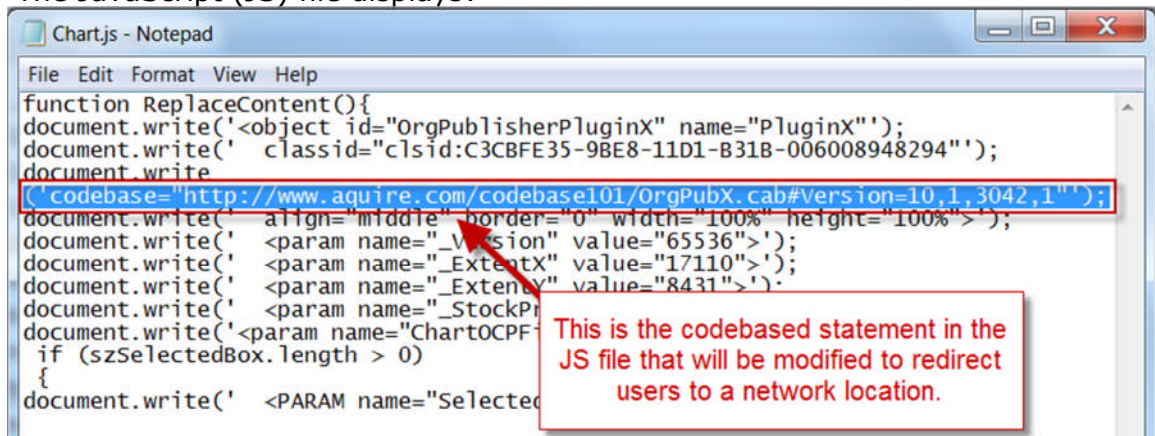
**Version 10.1 CAB File:**

<http://www.aquire.com/codebase101/OrgPubX.cab#Version=10,1,3042,1>

2. Copy the cabinet file to your Intranet web server.
3. Publish the OrgPublisher organizational chart if this has not already been done.
4. Navigate to the folder containing the published chart files.
5. Right click on the JavaScript or JS file
6. Select Edit.
7. The JavaScript (JS) file displays:



**Figure 10. Edit JS File**



**Figure 11. Example JavaScript File Codebased Statement**

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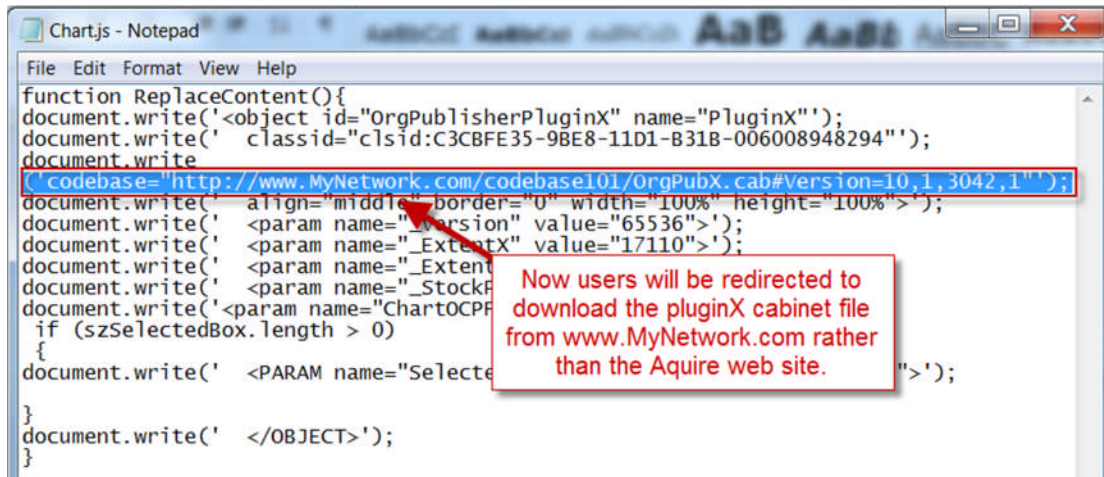
- The codebase statement in the published **JS** file must be modified to point to the internal location you deploy it to:

**CODEBASED STATEMENT - BEFORE**

```
document.write
('=http://www.aquire.com/codebase101/OrgPubX.cab#Version=10,1,3042,1");
```

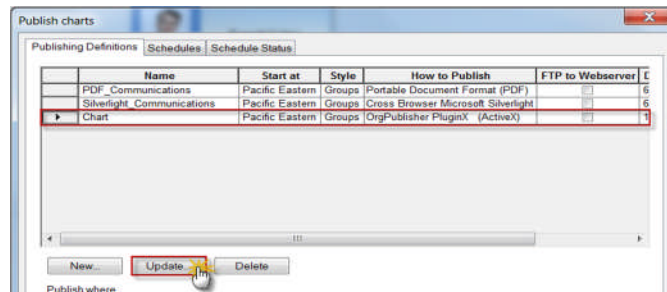
**CODEBASED STATEMENT - AFTER**

```
document.write
('=http://www.mynetwork.com/codebase101/OrgPubX.cab#Version=10,1,3042,1");
```



**Figure 12. Modified JavaScript File**

- Each time you publish PluginX or EChart Rich Client chart, the JavaScript (JS) file is overwritten. To preserve the changes made to the JavaScript (JS) file, open the chart file in OrgPublisher.
- Go to the File Menu and select Publish.
- The Publish Charts window opens. Select the publishing definition in the list.
- Click Update.

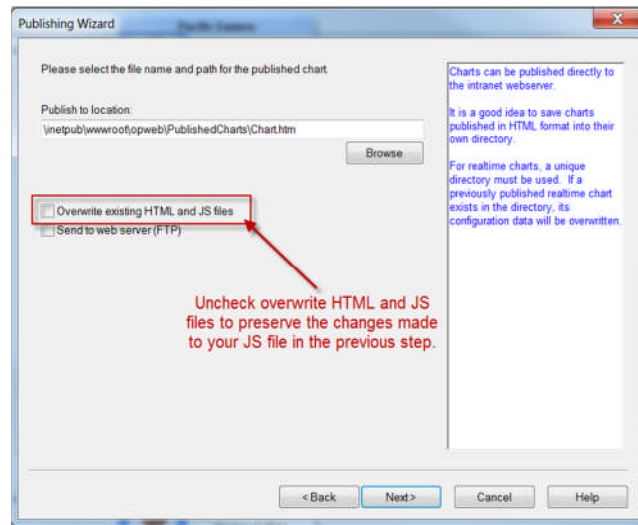


**Figure 13. Update Publishing Definition**

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13. Click Next 2 times and the Publish to Location screen displays. By default, the Overwrite existing HTML and JS files box is checked. Clear the **Overwrite existing HTML and JS file** option.

**Note:** You can clear the check box during creation of a new publishing definition or when updating an existing publishing definition.



**Figure 14. Uncheck Overwrite JS File**

14. Click through and publish the chart to update the publishing definition.
15. Save the chart file to save the updates made to the publishing definition. The JavaScript file modification will now be preserved each time the chart is republished.

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## Request Aquire MSI Scripts

Aquire has MSI scripts (Microsoft Installer packages) available to assist with pushing out the PluginX files to locked down workstations. The MSI scripts will install and register the pluginX component on the workstation.

If you require the MSI scripts to automate the installation of the PluginX, please send an email to [support@acquire.com](mailto:support@acquire.com) to request these files. Include the full version number of the OrgPublisher application installed to ensure you receive the set of correct instructions.

To verify which version of OrgPublisher is installed, open the application and go to Help -> About OrgPublisher. The full version number will display.



**Figure 15. About OrgPublisher**

**Note:** Aquire does not provide technical assistance or support for the MSI scripts.

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## Testing the PluginX Installation

To test if the pluginX file successfully installed on a workstation, click on a chart link to open it in the browser. If needed, click on the Aquire sample chart link:

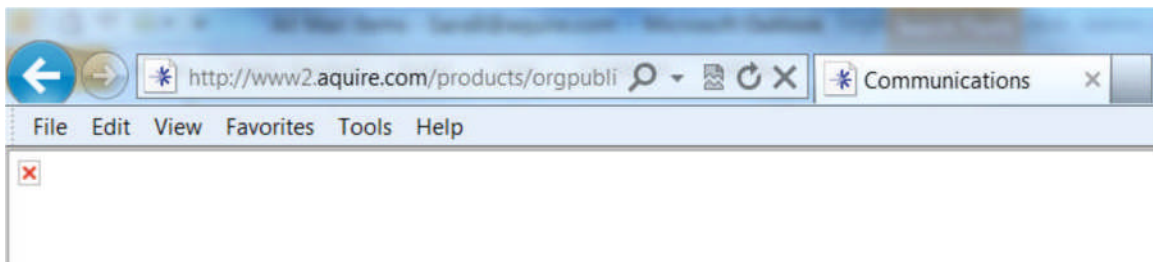
[OrgPublisher 10.1 Chart Sample: Communications.](#)

If the chart displays, the installation was successful.

Note: It is recommended to add the published chart URL to the list of Trusted Sites in Internet Explorer.

### Troubleshooting

If a red X displays in top left-hand corner of the Internet Explorer browser, this means an administrator will need to assist with installation of the pluginX on the workstation.



**Figure 16. Red X in Internet Explorer**

If you are prompted to install a pluginX file each time you view a chart, then an administrator will need to assist with installing the pluginX viewer as you may not have permissions to write to the registry.



**Figure 17. Install PluginX**

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If you are prompted with the following message, you will need to allow the add-on to run in the website. If the chart does not display after you indicate to allow the add-on, this indicates a group policy may prevent users from running ActiveX content. The IT department will need to be contacted to determine if the pluginX can be run.



**Figure 18. Run PluginX**

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# PluginX End User Help

The pluginX toolbars used in published PluginX/EChart Rich Client charts, OrgPlan charts, and OrgPublisher Web Administration provide end user help so that users can become more familiar with OrgPublisher toolbar functionality.

## PluginX/EChart Rich Client End User Help

The end user help in a PluginX/Echart Rich Client chart is available by clicking on the **Help** button in the toolbar.



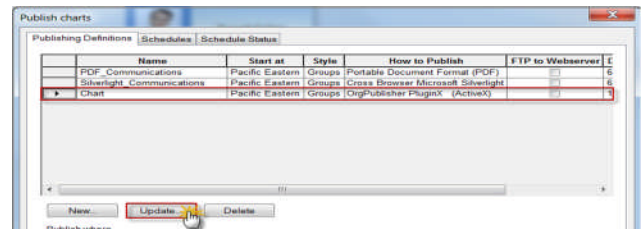
**Figure 19. OrgPublisher End User Help**

When selected the user will be directed, by default to the Aquire web site to access End User Help at the following link:

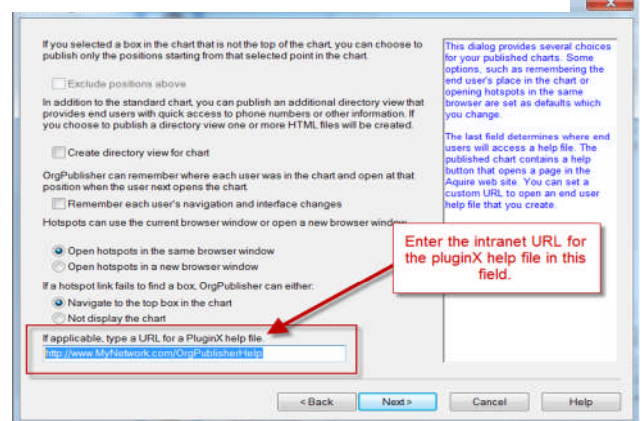
[http://pluginx.aquire.com/support/op101pluginxhelp/make\\_chart\\_work.html](http://pluginx.aquire.com/support/op101pluginxhelp/make_chart_work.html)

If preferred, you can choose to redirect users to an intranet URL to access a tailored end user help file. To do this, follow the directions below:

1. Copy your tailored PluginX help file to your Intranet Web Server.
2. Open the chart file in OrgPublisher.
3. Go to the File Menu and select Publish.
4. Select the publishing definition in the list and select update.
5. In the following page of the publishing definition, type the intranet URL of the pluginX help file in the field below: If applicable, enter a URL for a PluginX help file.
6. Publish the chart to update the publishing definition.
7. Save the chart to also save the updates to the publishing definition



**Figure 20. Update Publishing Definition**




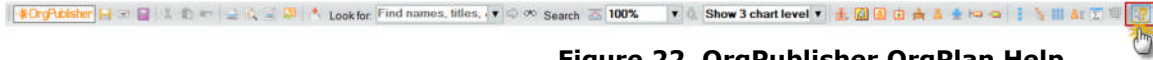
**Figure 21. OrgPublisher PluginX toolbar**

**Note:** You can enter the URL for the PluginX help during creation of a new publishing definition or when updating an existing publishing definition.

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## OrgPlan End User Help

The end user help in an OrgPlan (planning chart) is available by clicking on the  button in the toolbar.



**Figure 22. OrgPublisher OrgPlan Help**

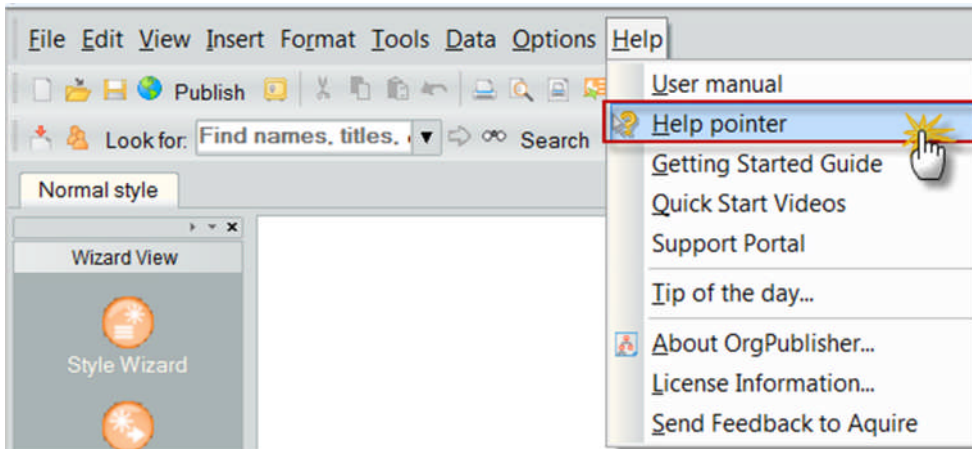
When this button is selected, a small question mark will display under the cursor. Then, the user can click on any button to display OrgPublisher help related to the toolbar button selected.

More information on the OrgPlan toolbar:

[What functions do the OrgPlan buttons and menu items offer?](#)

## Web Admin Chart Administrator Help

Chart administrators using Web Administration can go to the Help Menu and select the Help pointer option to display Help for any toolbar button selected. In addition, the Getting Started Guide, User Manual, [Quick Start Videos](#), and [How to Guides](#) in the Aquire Customer Care Center are available for additional guidance.



**Figure 23. OrgPublisher Web Admin Help**

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