

# OrgPublisher Real-time Implementation Guide

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# OrgPublisher Real-time Introduction

The purpose of this document is to provide an overview of OrgPublisher's Real-time publishing option, and to provide the information needed to assist you in determining if this functionality is right for your facility.

- Real-time charts provide users with immediate access to up-to-date information.
- Real-time publishing is an option when publishing an EChart, either Rich or Thin Client, that has been created using any ODBC/OLE DB compliant data source.

## *Choosing Real-time Over Non-Real-time Charts*

OrgPublisher provides users with access to information using real-time and non-real-time charting options. Both methods should be carefully evaluated before making a final decision on the proper charting method for your company.

Real-time charting provides users with live access to data. Live access increases traffic and resource utilization on the management system storing the data which may impact its overall performance.

Non-real-time charting extracts information at a scheduled time interval (typically nightly). This eliminates performance concerns on management systems while providing time dated information from the previous day.

Additionally, real-time charting does not offer the following features available in the non-real-time charts:

- summary/analytic reporting
- compound searching
- group-based searching
- some security options

**Note:** *A hybrid approach can be taken which involves the creation of a real-time and a non-real-time chart. Standard users are given typical access to non-real-time charts and designated users requiring live access are given access to real-time charts.*

The following points will help guide you through the evaluation process:

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### Real-time may be an option if:

- Your IT department has approved the use of real-time charts.
- Your system can minimize performance decreases when your end users access real-time charts.
- The performance for your end user does not decrease as the chart size increases.
- Your data source is an ODBC connection from an Oracle® or SQL database.
- You publish your chart infrequently or over long scheduled intervals.

### Real-time should *not* be considered if:

- Your chart is built from multiple data sources
- Your HR system does not have the capacity to process the number (possibly hundreds) of real-time inquiries.
- Your chart contains sensitive data fields intended only for select managers.
- You need to conduct complex searches in order to create groups.
- You need access to summary reporting.
- You publish at frequent intervals, such as nightly.
- End users need the ability to save their own groups.

For more information, please contact Aquire at <http://www.aquire.com/>.

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# Architecture Overview

Real-time charts provide users with immediate access to up-to-date information. Dynamic organizational charts are generated using real-time access for Microsoft® SQL, Oracle®, or Microsoft® Access data source, and then published in EChart format.

## Real-time Chart Publishing Requirements

Requirements for publishing real-time charts include:

- Microsoft® Data Access Components (MDAC) 2.6 or higher.
- ASP.NET support on the Web server.
- EChart that has been created using an ODBC connection.
  - ECharts use a Microsoft® Internet Explorer browser.
  - ECharts require Microsoft® IIS or ISAPI-compliant server.
- Chart must be published to a virtual directory.

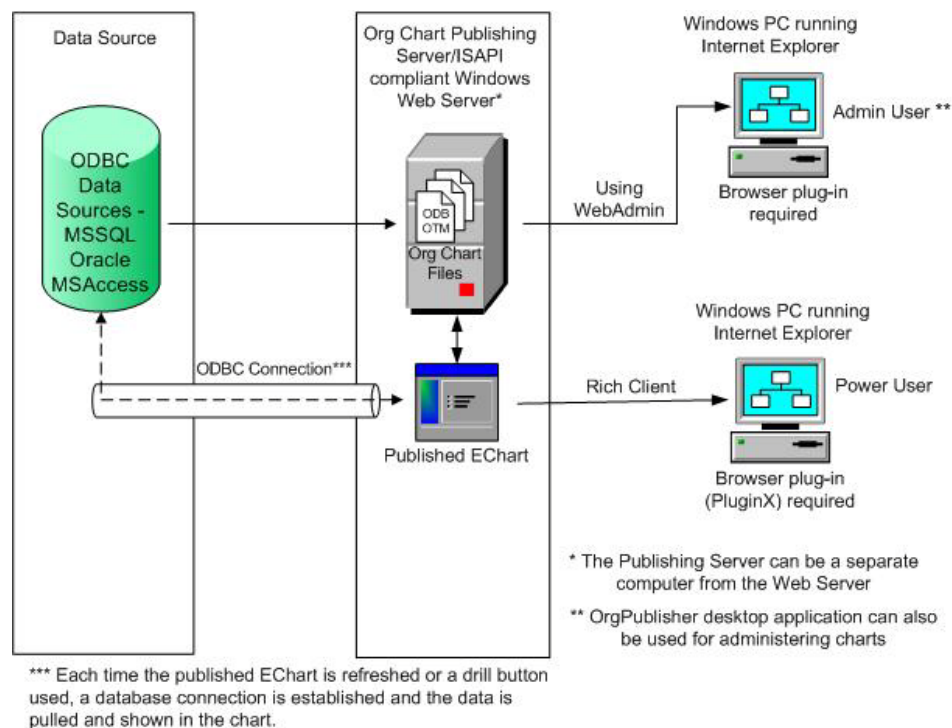


Figure 1

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## Configuring the Server

In order to publish real-time charts, you must follow your server configuration steps for EChart or Web Administration setup. The OrgPublisher Web Administration Server configuration will work for real-time charts, but you must follow the *Configuring IIS to Run .NET Framework* procedure below.

### Configuring IIS to Run .NET Framework

If you are publishing using the OrgPublisher Web Administration Server, you must configure IIS to run .NET Framework. On the server where real-time charts will be published, access a command line and type:

```
CD\WINDOWS\Microsoft.NET\Framework\v1.1.4322
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322> aspnet_regiis.exe -i
```

The system responds with:

**Start installing ASP.NET (1.1.4322.0)**

**Finished installing ASP.NET (1.1.4322.0)**

### IIS Configuration on Windows<sup>®</sup> 2003 and Windows<sup>®</sup> 2008 Servers

When using the Microsoft Windows 2003 Server with OrgPublisher Web Administration, ASP.NET V1.1.4322 must be enabled as an extension. This is in addition to the EChart or Web Administration setup configuration.

**Note:** *If you are publishing real-time charts using the OrgPublisher Web Administration Server, you must first (one time only) open OrgPublisher on the server outside of Web Administration. Using the Publishing Wizard, create the Connection String in the publishing definition, create your ODB chart, and save the chart to the **Sourcecharts** folder.*

*When using Web Administration from your desktop, OrgPublisher looks only at your desktop for the data source name. In order to successfully publish real-time charts in Web Administration, OrgPublisher must, however, get the data source name from the server.*

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## Publishing Real-time Charts

Real-time publishing is an option when publishing a Rich Client EChart that has been created using an ODBC connection.

**Only one real-time chart can be supported in the PublishedCharts folder at a time. If you plan to concurrently publish more than one real-time chart, place them in separate folders.**


**Note:** *Preconfigured connectors may contain some limitations. There is more than one way to extract data from your database. Reporting tools that often come with major ERP systems can extract a comma-delimited file that can be configured to build a chart. If you need assistance in configuring your data extract, please contact the Product Support team at <http://www.aquire.com/support/>*

This option requires Microsoft® Data Access Components (MDAC) 2.6 or higher, ASP.NET support on the Web server, and must be published to a virtual directory.

You can also configure real-time connections for a Unifi chart. See the OrgPublisher online Help file topic **Real-time Connection Configuration** for more information.

**Note:** *The EChart option supports Microsoft® Internet Explorer or, and requires a Microsoft® IIS or ISAPI-compliant server.*

*Real-time charts must be secured via your IIS, not through the Publishing Wizard. The security dialog is not available when you publish a real-time chart.*

1. Create your chart in the *New Chart Wizard*, first selecting Organizational chart, and then using the **ODBC database** option. Follow the *New Chart Wizard* dialog prompts to select the data source.
2. After the new chart has been created and opened in OrgPublisher, click the **Publish** button  in the toolbar.

If this is the first time you are publishing a chart, the wizard opens to the first dialog which gives you a brief overview of the Publishing Wizard.

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- Select the **Advance Mode** option. Click **Next**, and then click **Next** again.
3. Follow the *Publishing Wizard* dialog prompts, verifying that you published as an EChart and used a virtual directory, until you reach the *Publishing Wizard Real-time Data* dialog (Figure 2).

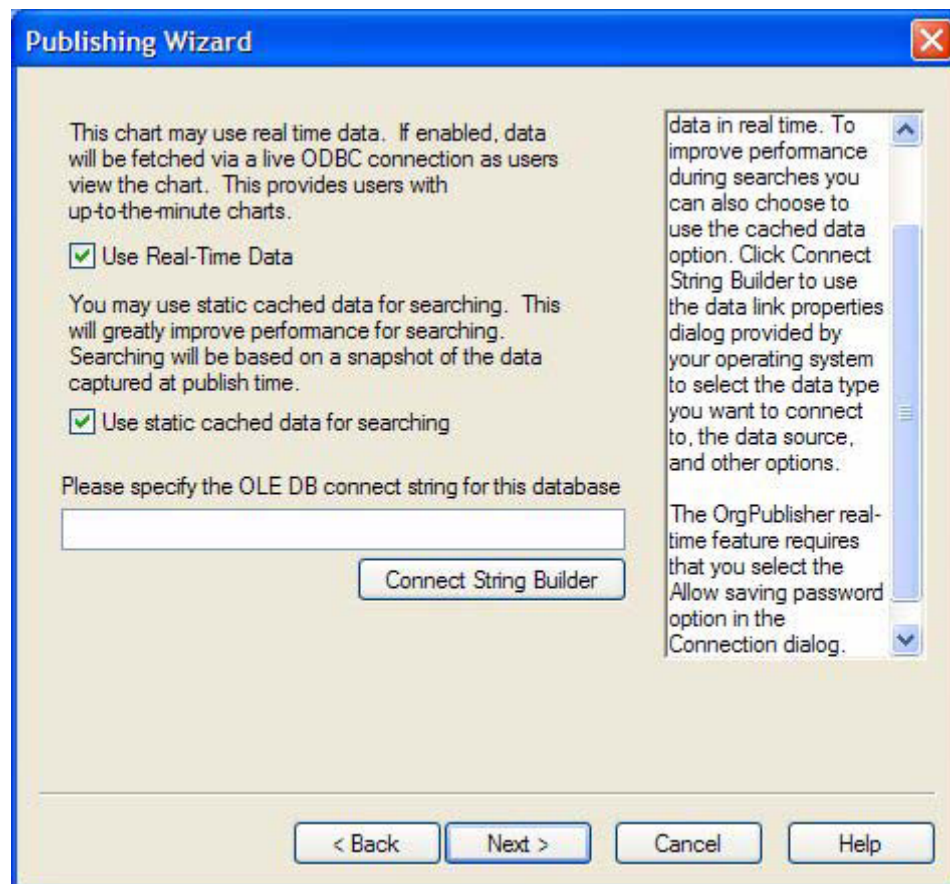


Figure 2

4. Select the **Use Real-Time Data** check box.
5. If you want to improve searching performance, you can select the **Use static cached data for searching** check box. This performs all searches using a "snapshot" of the data as of publishing time only. If you do not select this option, end users will be able to search using real-time data.

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6. Type the **OLE DB connect string** for the database.
7. Click **Next** and proceed to Step 9.

-or-

If you need help building the connect string, click **Connect String Builder**.

The Data Link Properties dialog opens at the **Provider** tab. Follow the Microsoft operating system prompts to select a data provider, build a connection string, choose a data source, and test the connection.

**Note:** *If you publish using Oracle<sup>®</sup>, you must use an OLE driver for Oracle. Select the **Microsoft<sup>®</sup> OLE DB Provider for Oracle<sup>®</sup>** drive or, if available, the **Oracle<sup>®</sup> OLE** device.*

8. Before you complete the *Data Link Properties* dialog, select the **Connection** tab.

You **MUST** select the **Allow saving password** check box. This allows the password to be saved in the connection string in order to open the chart.

Click **OK** to close the dialog and return to the *Publishing Wizard*.

9. Complete the *Publishing Wizard*.

**Note:** *The **PublishedCharts** folder will contain the usual EChart files. In addition, it will store **OrgPubRealTime.dbconfig** (contains the encrypted connection string data and column names) as well as **OrgPubRealTime.asmx** (directs real-time charts to use the EChart DLL).*

Real-time publishing is not available when creating charts from multiple data sources.

OrgPublisher 9 provides Real-time publishing features. For information on the additional features and instructions for using them, see the Online Help topics:

- *Publishing real-time Charts*
- *Creating an Org Chart from a Unifi Style*
- *Configure Real-time Connections*

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