

OrgPublisher 9 Upgrade Considerations

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Upgrading from OrgPublisher Versions 3 through 8

The following information is provided to assist in planning the upgrade activity for OrgPublisher 9 if you are currently using older versions of OrgPublisher.

| If you... | In Version 9 you need to... | Because... |
|---|---|--|
| are using OrgPublisher version 5, 6, 7 or 8 without Web Based Administration: | use Add/Remove Programs to uninstall the OrgPublisher application. | it removes the earlier versions. |
| using Web Based Administration: | <ol style="list-style-type: none"> 1. Stop the Web service. 2. Uninstall older version using Add/Remove Programs 3. Delete the remoteserver.dll file. 4. Install OP9. 5. Start the Web service. | the new version of the remoteserver.dll file needs to be installed. |
| are currently publishing ECharts with an older version of OrgPublisher | <ol style="list-style-type: none"> 1. Stop the Web service. 2. Delete the dll file(s) for your EChart(s) both Rich and Thin client. (These are files located in your Published Charts folder and they are named for each EChart you published.) 3. Start the Web service. | the dll file will not be overwritten if it is in use. |

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| If you... | In Version 9 you need to... | Because... |
|--|---|--|
| <p>published as OrgPublisher PluginX and customized the HTML page for any reason.</p> <p>OR</p> <p>deployed the PluginX component (cabinet file) from your company server.</p> <p>OR</p> <p>if you have users who are not administrators on their own PCs and cannot install plugins, you can request scripts to "push out" the plugins to locked down PCs from the Aquire support team at support@acquire.com.</p> | <p>copy and paste the following URL to your browser to download the v9 cabinet file from our Website: http://www.acquire.com/downloads/plugins/ and select the option to download the OrgPublisher 9 Cabinet file.</p> <p>edit the .js file with Notepad (.htm files contained codebase statement in versions previous to V7R).</p> <p>modify the codebase statement to reflect your path: codebase=http://www.acquire.com/codebase91/orgpubX.cab#Version=9,1,2602,1</p> | <p>the cabinet file must be updated to utilize OrgPublisher 9 features.</p> <p>Tip: A feature in the Publishing Wizard allows you to create an OrgPublisher PluginX definition that will not overwrite the .js file each time you publish. This will preserve any changes made to your file.</p> |
| <p>have scheduled publishing.</p> | <p>delete and recreate the scheduled jobs either using Microsoft task scheduler (for EChart batch files) or in the publishing definition in OrgPublisher.</p> <p>Alternatively, you can modify the .BAT file or the scheduled task job to point to the correct OrgPublisher install folder's orgpub32.exe.</p> | <p>it updates the scheduled job to open the new version path.</p> |
| <p>would like to use the new features in publishing definitions.</p> | <p>update any existing publishing definitions with new tool bar options. (This may be a function of Chart Administrator)</p> | <p>the toolbar selections can now be turned on at the button level in based on groups V9.</p> |

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| If you... | In Version 9 you need to... | Because... |
|---|--|---|
| <p>used a default template.</p> | <ol style="list-style-type: none"> 1. start OrgPublisher 9. Select File > Set template as default. 2. locate the OP4, OP5, OP6, OP7 or OP8 file default.otm. (By default, OrgPublisher is installed in Program Files/OrgPubX, (X is your old version number.) 3. copy the default.otm file from that folder into the V9 folder. | <p>OrgPublisher 9 is (by default) installed in a separate directory; copying default.otm will preserve your chart formatting information.</p> |
| <p>would like to use the Multiple Reports feature.</p> <p>Would like to use the Compare two charts feature</p> <p>You may have done this during previous upgrades or you may not be using these features.</p> | <p>Make sure field 5 of the input file, the ID field, is a unique identifier for the employee.</p> <p>Make sure you designate a data field with a unique ID as "Position ID" (if using ODBC mapping) or Field 17 if using a .csv file.</p> | <p>this field is used to tie all records for an employee together.</p> <p>If you have person-to- person reporting you can use field 5 to compare charts, but if you want to track movement of positions, use PositionID</p> |
| <p>created My groups in a published PluginX/EChart.</p> <p>You may have done this during previous upgrades or you may not be using these features.</p> | <ol style="list-style-type: none"> 1. Before publishing the new charts, instruct your users to export their "My groups" groups using the Export Groups function. 2. Republish your charts. 3. Instruct your users to import the groups using the Import Groups function. | <p>the My groups definitions are stored in a different registry key.</p> |
| <p>are upgrading from V3</p> <p>are upgrading from V4 through V8</p> | <p>Continue to next section.</p> <p>You are done.</p> | |

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Upgrading from Version 3.3a

The following information is provided to assist in planning the upgrade activity with the installation of OrgPublisher 8.1 if you are currently using OrgPublisher 3.3a.

| If you... | In Version 8.1, you need to... | Because... |
|---|---|--|
| <p>customized the <i>Search Dialog</i> box using registry settings.</p> | <ol style="list-style-type: none"> 1. Select Options, then Search Options. 2. Select Customize Search dialog and make the changes needed. | <p>v3.x used Registry settings to control the <i>Search dialog</i> box. V8 stores this information in the template (.otm).</p> |
| <p>used OrgPublisher AutoPub to automatically publish charts.</p> | <ol style="list-style-type: none"> 1. remove OrgPublisher AutoPub: <ol style="list-style-type: none"> a. select Start > Settings > Control Panel > Add/Remove Programs. b. select TimeVision OrgPublisher AutoPub. c. click Add/Remove. 2. delete previously scheduled jobs in Task Scheduler: <ol style="list-style-type: none"> a. select Start > Settings > Control Panel > Scheduled Tasks. b. delete the scheduled tasks. 3. create new publishing definitions: <ol style="list-style-type: none"> a. click Publish. b. click New. c. follow the prompts in the <i>Publishing Wizard</i>. d. select the Schedules tab in the <i>Publish Charts</i> window. e. select New. f. follow the prompts to create the new schedule. g. delete the v3.x publishing definitions. | <p>automatic publishing is now built into OrgPublisher.</p> |

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