

OrgPublisher Before You Begin



OrgPublisher 10 Training

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Table of Contents

1	Chart Administrator – What Does that Mean?.....	1
2	Installed?.....	2
2.1	OrgPublisher Client vs. OrgPublisher Web Administration.....	2
3	Chart Box Components	4
4	Basic Data for Charts	5
4.1	Basic Position-to-Position Chart	5
4.2	Basic Person-to-Person Chart	7
5	Data Errors	8
5.1	Activate Error Message Display.....	8
5.2	Orphans.....	8
5.3	Recursive Relationships	9
5.4	Dual Reporting Relationship for a Record	9
6	OrgPublisher File Types.....	10
7	Data Sources	11
7.1	CSV File in the OrgPublisher Specified Order	11
7.1.1	Field List Order.....	12
7.2	Comma Separated File – No Specific Order	17
7.3	ODBC Wizard.....	17
8	What Do Most Customers Do?	19
8.1	General Viewing Chart.....	19
8.1.1	General Viewing – Directory	19
8.2	Human Resources/Management Chart	20
8.3	Organizational Planning/Succession Planning Chart.....	20

1 Chart Administrator – What Does that Mean?

OrgPublisher has been purchased by your organization. There are many reasons this product is used in over 2700 companies around the world. One of the most common purposes is to centralize the production of organizational charts using existing HR data.

OrgPublisher customers identify the charts that are needed and for various audiences within the organization. As you already know, there is a need for certain charts to be restricted. This can help to keep people from seeing data about others outside their organizations while allowing other viewers of the chart access to see data applicable to their role and responsibilities within the company. OrgPublisher helps you control who accesses what information.

Another reason customers purchase OrgPublisher is so they can schedule the publishing of the charts. The frequency of publishing assists HR in communicating what data is stored about employees and the company hierarchy. Viewers of the chart grow to depend on the accuracy of current charts and assist in maintaining that accuracy by communicating changes.

Whatever the reasons your company purchased OrgPublisher, you have now been designated as a Chart Administrator. What does that mean?

Chart Administrators perform the following functions in OrgPublisher:

- Bring the data into OrgPublisher (more on this later in this manual)
- Format the data, charts, print output, security, etc. to meet the needs of the various audiences and as designed by the Project team
- Setup (via a Wizard) the publishing definition (method of chart distribution) determined by your Project Team

The beauty of OrgPublisher is that once this setup and publishing is placed on a schedule, you only have to maintain formatting changes and new chart requirements in the future.

2 Installed?

The next step is to confirm that OrgPublisher is installed, how it was installed, and if you have access. There are two options for installing OrgPublisher. It helps to understand why your organization chose access via Web Administration vs. the OrgPublisher Client and what each options provides.

2.1 OrgPublisher Client vs. OrgPublisher Web Administration

	OrgPublisher Client	OrgPublisher Web Administration
Installation	<ul style="list-style-type: none"> • User Desktop (Uncommon) • Server - Chart Administrator accesses via: <ul style="list-style-type: none"> ○ VPN ○ Remote Desktop ○ Server Login 	<ul style="list-style-type: none"> • Server • Chart Administrator is provided a link to access • License allows for 5 simultaneous connections
Primary Purpose	Centralize all charting activities to one or two users: <ul style="list-style-type: none"> • Data connection to one or more data sources • Formatting • Publishing • Scheduling • One-Off chart creation 	The data connection to one or more data sources generated by IT on the Web Administration Server Access to the data source provided by a link to multiple administrators: <ul style="list-style-type: none"> • To format and manually publishing the chart to multiple people • Save off a copy of the data for single one-off chart creation
Chart Management	Chart Administrator has total control	Chart Administrator has restricted control
Scheduling	<ul style="list-style-type: none"> • Chart Administrator can schedule the publishing of the chart 	<ul style="list-style-type: none"> • Chart Administrator requests the setup of the publishing schedule by IT Group responsible for the Web Administration Server
Data	<ul style="list-style-type: none"> • Chart Administrator can access data from any source 	<ul style="list-style-type: none"> • Chart administrators can use .csv files prepared in the order specified by OrgPublisher • ODB Compliant data sources
Field Mapping & Multiple Data Sources	<ul style="list-style-type: none"> • Chart Administrator can create multiple charts from a single .csv data 	<ul style="list-style-type: none"> • Chart Administrator can only map needed fields and bring in secondary

	<p>extraction by mapping fields with the built-in connector.</p> <ul style="list-style-type: none"> • The Chart Administrator can map additional .csv source files into an existing chart. 	<p>data sources that are ODB compliant.</p> <ul style="list-style-type: none"> • If a secondary data source is needed for the chart that is provided as a .csv file, the IT Group responsible for the Web Administration Server must set this up for the chart administrator. This is done by logging on to the server and using the client to create the connection and mappings.
<p>Published Chart Location</p>	<ul style="list-style-type: none"> • Chart Administrator controls where the charts are published. 	<ul style="list-style-type: none"> • All source data files and published charts are stored automatically in specific folders established at installation.

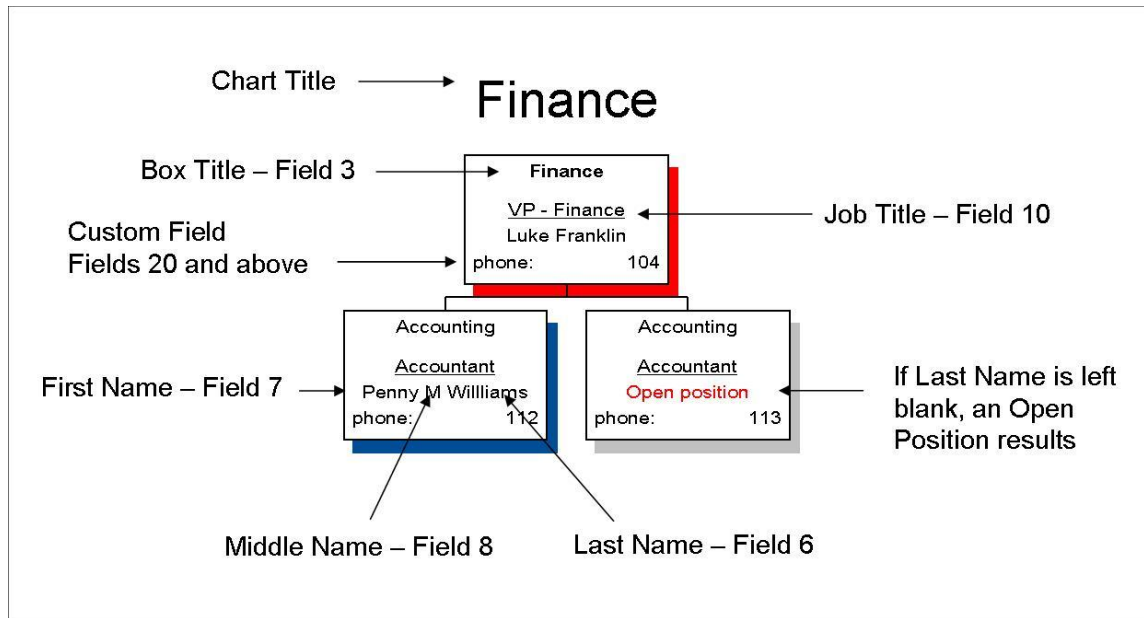
Throughout the training manuals, if there is a difference in how something is achieved between the two administrative installations, it will be noted in the appropriate section of the text.

3 Chart Box Components

There are 3 primary areas to a chart box:

- Box Title
- Job Title
- Person/Name

The components of the chart and chart box are provided below.

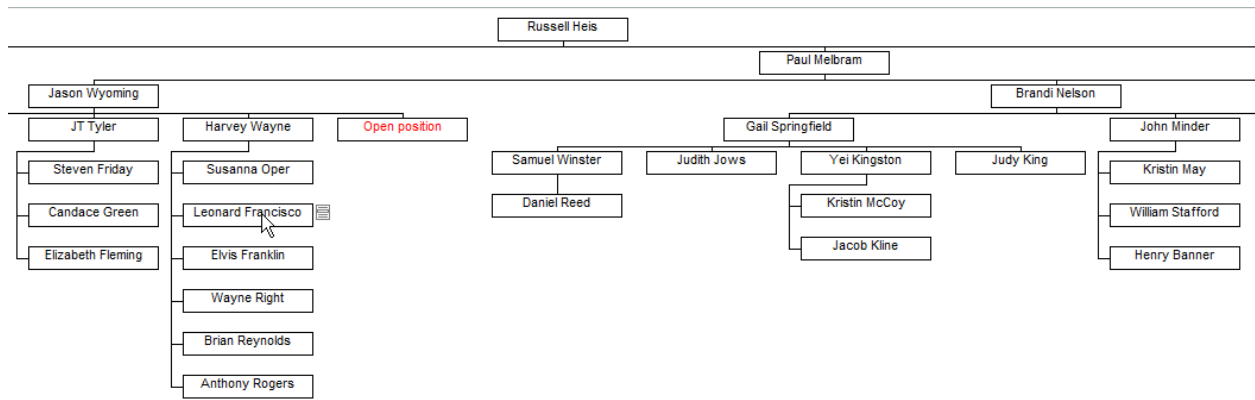


4 Basic Data for Charts

OrgPublisher creates charts with your existing HR data. A chart/hierarchy can be created with as little as **2** fields of data:

- The Manager’s Employee ID or Supervisory Position ID
- The Employee’s ID or the Position ID held by the employee

Although, the chart lacks some data you may be accustomed to seeing, it is a hierarchical representation of an organization. In this example, the Supervisory Position ID and Employee’s Position ID were used to create the hierarchy. The employee’s name was also passed in with the data so the chart box would not be empty.



4.1 Basic Position-to-Position Chart

The file used to create this chart in OrgPublisher is a .csv file. It looks like the file displayed below, when opened in Notepad. This file is a Position-to-Position hierarchy.

- The Number 10 in the first record is the Supervisor’s Position ID.
- The Number 408, is the Position ID.
- The person holding the Position is Rita Hayes.

```

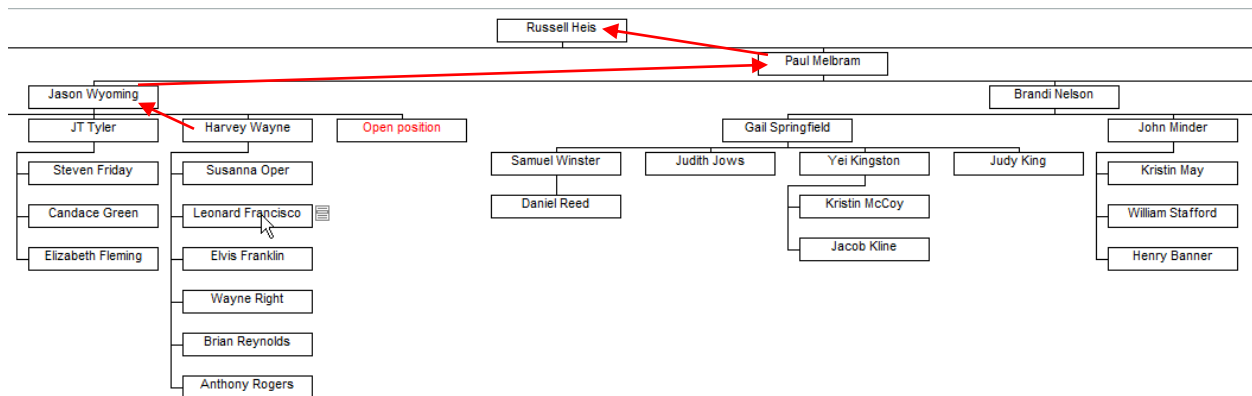
4Fields.csv - Notepad
File Edit Format View Help
10,408,Hayes,Rita
25,409,Kelly,Michael
420,410,Kerr,Pam
21,411,King,Judy
123,412,Little,Ethan
12,413,Long,Rachelle
103,414,McCoy,Kristin
420,415,Metz,Laura
100,416,Reed,Daniel
38,417,Roberts,Christopher
93,418,Rogers,Anthony
  
```

Below is the same file, but it has been re-ordered and opened in Microsoft Excel. Headings have been added to define the columns of data.

- Parent Box ID = Supervisor’s Position ID
- Box ID = Employee’s Position ID
- Last Name = Employee’s Last Name
- First Name = Employee’s First Name

	A	B	C	D	E
1	Parent Box ID	Box ID	Last Name	First Name	
2			1 Heis	Russell	
3		1	4 Melbram	Paul	
4		4	7 Wyoming	Jason	
5		7	93 Wayne	Harvey	
6		7	98		
7		10	408 Hayes	Rita	
8		25	409 Kelly	Michael	

- ***No one**** holds Position #98 (Box ID). It is an *open, vacant, or unassigned* Position. Position ID #98 reports to Parent Box ID #7.
- Harvey Wayne holds Position ID #93 (Box ID). Position ID #98 reports to Parent Box ID #7.
- Jason Wyoming holds Position ID #7 (Box ID). Position ID #7 reports to Parent Box ID #4.
- Paul Melbram holds Position ID #4 (Box ID). Position ID #4 reports to Parent Box ID #1.
- Russell Heis holds Position ID #1 (Box ID). Position ID# 1 does not report to a position. It is the top of the chart.



***Please note:** Open Positions and Indirect Reporting Positions may be displayed if your hierarchy is a Position to Position hierarchy. An Open Position is presented in the example above.

4.2 Basic Person-to-Person Chart

This is the same file presented earlier, but with a person-to-person reporting relationship.

- Parent Box ID is the Employee Number of the Manager or Supervisor
- Box ID is the employee's ID.

	A	B	C	D
1	Parent Box ID	Box ID	Last Name	First Name
2		4485	Heis	Russell
3	4485	5678	Melbram	Paul
4	5678	7684	Wyoming	Jason
5	7684	1035	Wayne	Harvey

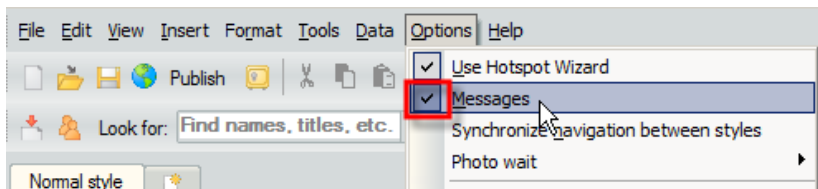
Please Note: If Paul Melbram (Box ID 5678) leaves this organization, Jason Wyoming would need to be re-assigned to a new manager. If he is not, then this record becomes a broken relationship or orphan record.

5 Data Errors

OrgPublisher helps you clean your data and keep it clean. OrgPublisher identifies orphan records and other broken relationships. This is most common with Reports-to hierarchies. As you bring data into OrgPublisher, the relationships/hierarchy in the Parent Box ID and Box ID are evaluated. If problems exist, warning messages appear.

5.1 Activate Error Message Display

To activate the display of warning and error messages, open OrgPublisher. Then, click on Options. If a check mark appears beside Messages, the warnings will display. If not, click on the word **Messages**. This will activate the check mark and close the Options display.

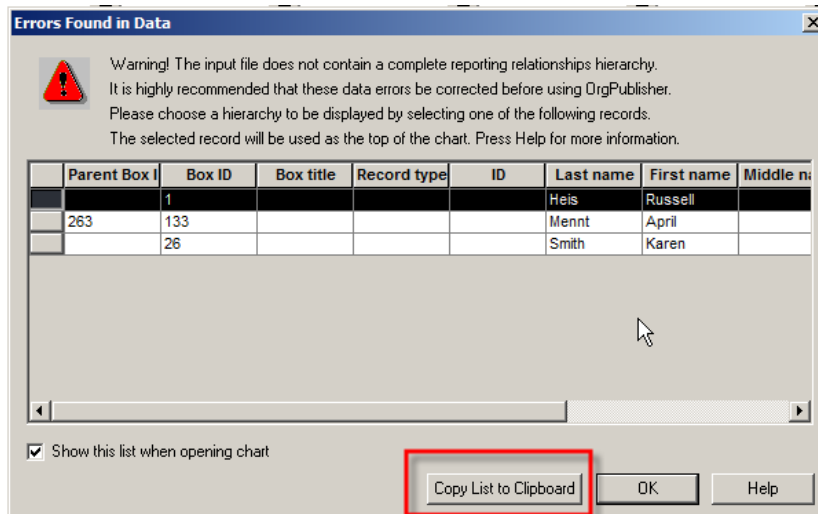


5.2 Orphans

In the error box below, April Mennt shows that she reports to Parent Box ID (Supervisor or Manager Employee ID) 263. OrgPublisher is indicating that there is not a record with the Box ID 263.

Karen Smith, Box ID 26 does not have a Parent Box ID. Neither does Russell Heis. One record is incorrect. OrgPublisher has selected Russell Heis as the top of the organization. Karen Smith should have her HR record updated with a new manager id.

The **Copy List to Clipboard** allows you to copy the error list and paste it into Excel. Print and then make the data corrections in your HR system.



5.3 Recursive Relationships

The following example shows 3 sets of recursive relationships.

- John Minder and Gail Springfield report to each other.
- Greg Pink, Paul Melbram and Amy Stepp report to each other.
- Lou Ramos reports to himself.

All of these data errors must be corrected for the chart to draw and function properly.

Parent Box ID	Box ID	Box title	Record type	ID	Last name	First name	Middle name
21	22				Minder	John	
22	21				Springfield	Gail	
24	3				Pink	Greg	
3	4				Melbram	Paul	
4	24				Stepp	Amy	
135	135				Ramos	Lou	

5.4 Dual Reporting Relationship for a Record

This error indicates that a Box ID is used for more than one record. You are told in the error message the Parent Box ID's effected, as well as the Box ID that is duplicated.

	A	B	C	D
151	316	322	Sutherland	Mary
152	317	323	Abbott	Lisa
153	123	323	Abbott	Lisa
154	317	324	Baxter	Justin
155	317	325	Boynton	Bryan

Please note: If this is intentional, you do not need to correct the error. But this warning will continue to display and will stop you from automatically publishing your charts. Also, if there are other records that are duplicated, their errors will appear as you correct the proceeding error.

6 OrgPublisher File Types

OrgPublisher produces several file types when charts are created and published. They are:

File Type	Description
ODB	Database connection file that does not use field mappings
ODBX	Database connection file created with field mappings
OCB	Chart data; comma delimited data file
OTM	<p>OrgPublisher stores the formatting in a template file which preserves the location of fields of data, their labels, any styles that were created, box shapes, color, text formatting, chart layout, custom field assignments, styles, Group criteria, publishing definitions, etc.</p> <p>An OTM file has a corresponding OCB, ODB or ODBX with the same file name. These should be stored in the same location. OrgPublisher pulls in the data (OCB, ODB or ODBX) and looks for the OTM for the formatting.</p> <p>To set a default template use File, then Set Template As Default. A default.otm file is created in the OrgPublisher installation folder. All subsequent new charts use the default template.</p> <p>Delete the default.otm file to cancel the use of a default template.</p>
OCP	<p>OrgPublisher published chart. It is the binary chart/template file combined.</p> <p>Users viewing the published charts use an ActiveX component (PluginX).</p> <p>This is the default file type for charts created using Aquire's OrgPublisher Advantage product.</p>
OCS	EChart – contains information to contact the EChart server, security
OPW	Web Administration file
HTM	<p>HTML code page: main chart page that determines the browser type and invokes the JS file for downloading the ActiveX Plugin.</p> <p>Also applicable to EChart, both thin and rich client.</p>
DLL	<p>EChart chart file: contains DLL for both thin client and rich client. DLL file is named the same as the published chart file and must be in the same directory as the EChart OCP file.</p> <p>Needs to be configured in ISAPI Filter setup (IIS6) or Handler Mapping (IIS7).</p>
BAT	EChart file for both thin and rich client; batch file that can be used for automated EChart publishing. See the Publish ECharts section of this document for detailed information.

7 Data Sources

There are several options for getting your most current data to OrgPublisher. The most common methods and why they are used are listed below.

7.1 CSV File in the OrgPublisher Specified Order

Primary Use	<ul style="list-style-type: none"> • OrgPublisher Web Administration and OrgPublisher Client • Data extraction created with OrgPublisher for SAP wizards • File Extension is .ocb or .csv
Advantage	<ul style="list-style-type: none"> • Does not require field mapping • Web Administration: Select the file from the list when Web Administration is launched. • Client: Launch OrgPublisher, click on File, and then click on Open. Point to the .csv or .ocb file to be used.
Disadvantage	<ul style="list-style-type: none"> • Chart Administrator does not control what fields will be in the chart – whether they are displayed or not • Fields that are not displayed or used for the chart must be set as unsearchable
Reminder	File must be extracted with the same field order and placed in the save folder using the same name and file extension. This is overwriting the (.ocb, .csv) each time the data is extracted. This replaces the data and reuses the corresponding .otm file that contains formatting and publishing information.

The following is a list of the fields and required sequence when using this method for chart generation.

Please note: Although a field is not required, it must be accounted for in the data extraction. In the example below, fields that do not have data are highlighted in pink. The first highlight indicates that there is not a Parent Box ID for the first record. A comma accounts for the Parent Box ID field, then data is provided for the 2nd field or Box ID field. The first record is the top box in the chart and does not report to anyone or another position.

```

"1","Management","<CEO>","1","Austin","Mathew","Chief Executive Officer","101"
"1","3","Information Systems","D","2","Gephart","Mike","IT Manager","102"
"3","4","Operations","E","3","Dallas","Mark","Operations","103"
"1","2","Finance","<VP>","4","Franklin","Luke","VP - Finance","104"
"1","5","Sales","M","5","Smith","Mary","Sales Manager","105"
"5","6","Sales","E","6","Jones","Sam","Sales Person","106"
"3","7","Information Systems","E","7","Houston","Jim","Network Technician","107"
  
```

7.1.1 Field List Order

Field Number	Excel Column	Required	Field Name	Description
1	A	YES	Parent Box ID	This identifies the report-to box. Any combination of letters or numbers can be used as the unique identifier. This usually contains the Reports_to_ID for the employee. It may contain the manager's unique position code if position management is used. This field does not display in the chart.
2	B	YES	Box ID	This identifies a box within the chart. This can be duplicated for several records when multiple people are located in the same box. This field usually contains the Employee_ID from your employee database. It may contain a unique employee position code if position management is used. This field does not appear in the chart.
3	C	NO	Box Title	This is the box title that displays at the top of the box. This could be the Cost Center or a full department name, for example Accounts Payable.

Field Number	Excel Column	Required	Field Name	Description
4	D	NO	Record Type	<p>This is the type of record, which if left blank, defaults to an Employee record type. You can also define custom record types by typing any alphanumeric characters other than those already used by OrgPublisher. You need to surround these characters with < > (for example <Vice President>). OrgPublisher's built-in record types are:</p> <p>M: Manager E: Employee A: Assistant I: Indirect Report (IM is an Indirect Report Manager) PR: Partner C: Contractor <SF>: Staff Function <SC>: Successor B: Box (Note: You may not insert a person in a "B" record type. It is typically used to display org units or departments only.)</p>
5	E	NO	ID	This field is optional information. It helps make the record unique. It can contain data such as employee ID.
6	F	YES	Last Name	The employee's last (or family) name. If fields 6, 7 and 8 are left blank, OrgPublisher will treat the record as an Open Position automatically.
7	G	NO	First Name	The employee's first name.
8	H	NO	Middle Name	The employee's middle name.

Field Number	Excel Column	Required	Field Name	Description
9	I	NO	Job ID	<p>This should contain a unique set of alpha or numeric characters for each job title or category and does not display in the chart. For example, all AP clerks would have the same job ID in their record.</p> <p>Used to control Job Title display when direct reports are combined in the box with the manager or a separate box below the manager.</p>
10	J	NO	Job Title	<p>This is the actual job title. It will appear above the name of the person in the box. For example, AP Clerk. Job titles appear in ascending sequence on the Job_ID for each job title within each box. Job titles are sorted on Job_ID within Position Type. A job title is associated with the first Position Type that appears beneath the job title. The priority of the Position Type determines the order that job titles of different Position Types appear within a box. This can be overridden by assigning the sequence number in field 13 of the comma-delimited text file.</p>
11	K	NO	Reserved	Please do not populate this field.
12	L	NO	Box Sequence Number	<p>The Box Sequence Number is optional and overrides the default positioning of the boxes. In V5, you may use a new feature to choose which field you want to sequence boxes by. By default, boxes are positioned from left to right in your chart alphabetically, by box ID. Input should be numeric only.</p>
13	M	NO	Job Sequence Number	<p>The Job Sequence Number is optional and overrides the default positioning of the job title. By default, job IDs are used for sorting multiple jobs within a single box. Input should be numeric only.</p>

Field Number	Excel Column	Required	Field Name	Description
14	N	NO	Position Sequence Number	The Position Sequence Number is optional and overrides the default positioning of the employee name. By default, multiple employee names are sorted alphabetically within a single box. Input should be numeric only.
15	O	NO	Photo	The file names of the photos for your chart can be placed in this field. If all photos are placed in the same location, use the Photo Wizard to specify a common path for all of your photo files. If photos are stored in different areas, you will need to provide the full path name in this field.
16	P	NO	Reserved	Please do not populate this field.
17	Q	NO	Position ID	This is a unique field for EACH record passed into OrgPublisher. This field remains constant each time the data is extracted. OrgPublisher uses this field for tracking and reporting movement with reports generated in OrgHistory and in OrgPublisher Premier's Org Planning and Succession Planning tools.
18	R	NO	Level Number	Position18 is used to pass in your levels for use in the multi-level peer display feature. This is a numeric absolute value level, for instance, if the parent level is 10 and the report-to is 1, OrgPublisher charts the report-to box as 9 levels below the parent box.
19	S	NO	Reserved	Please do not populate this field.
20 and up	T +	NO	Custom Fields	Fields 20 and up allow you to load extra data needed to be displayed in your organization chart. For example, the custom field of Phone Ext. might be field 20.
<p>Succession Planning Charts</p> <p>There are 15 fields that are available for mapping when you select to create a Succession Planning chart.</p>				
Field Number	Excel Column	Required	Field Name	Description

Field Number	Excel Column	Required	Field Name	Description
50	AX	NO	Key Person	
51	AY	NO	Location	
52	AZ	NO	Age	
53	BA	NO	Salary	
54	BB	NO	Performance Rating	
55	BC	NO	Education Level	
56	BD	NO	Skills	
57	BE	NO	Certifications	
58	BF	NO	Competency Rating	
59	BG	NO	Successor Rank	
60	BH	NO	Designated Successor	
61	BI	NO	High Potential Rating	
62	BJ	NO	Readiness	
63	BK	NO	Retention Risk	
64	BL	NO	Impact of Loss	

7.2 Comma Separated File – No Specific Order

Primary Use	<ul style="list-style-type: none"> • OrgPublisher Client • OrgPublisher Web Administration (by IT owner of the Server) • Data extraction created with OrgPublisher for SAP wizards • File Extension is .ocb or .csv
Advantage	<ul style="list-style-type: none"> • Fields do not have to be provided in a specific order • The ODB Wizard guides the user to accessing and mapping the desired fields <ul style="list-style-type: none"> ○ Client: Administrator can map the desired fields for the chart. ○ Web Administration: The IT owner of the server can map the desired fields for use by logging on to the Server and launching the Client.
Disadvantage	<ul style="list-style-type: none"> • OrgPublisher Web Administration users must get IT or owner of the server involved to created the mapped connection to the .csv or .ocb
Reminder	<ul style="list-style-type: none"> • If new fields are added to the source (.csv or .ocb file), they must be added at the end of the record. • File must be extracted with the same field order and placed in the save folder using the same name and file extension. This is overwriting the (.ocb, .csv) each time the data is extracted. This replaces the data and reuses the corresponding .otm file that contains formatting and publishing information.

7.3 ODBC Wizard

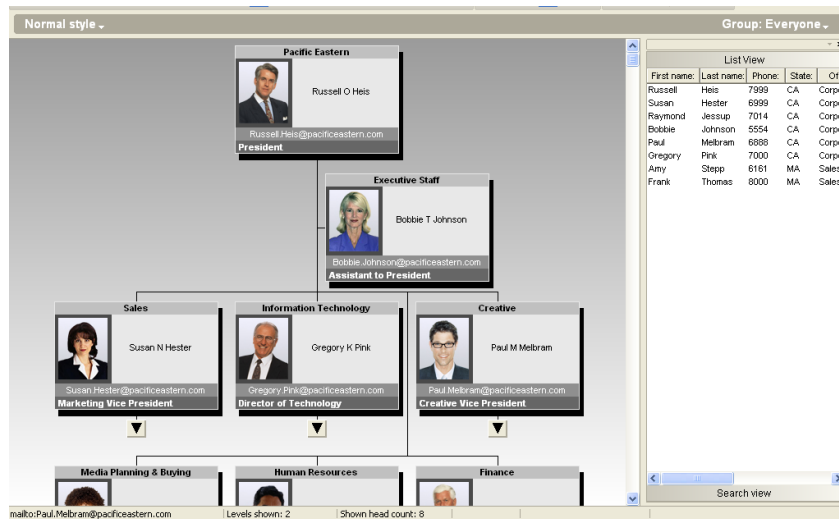
Primary Use	<ul style="list-style-type: none"> • OrgPublisher Web Administration or OrgPublisher Client • Connect to any ODB Compliant database <ul style="list-style-type: none"> ○ Use a View, Query or Table within the database ○ Can write custom SQL in the wizard • Client: Can use the wizard to “connect” and map fields from a .csv, .txt or .ocb file • Used to add additional data sources containing: <ul style="list-style-type: none"> ○ Additional records, such as Contractors, Interns, Temps, etc. ○ Additional data about the records in the chart from another data source, such as Asset, Performance, or Payroll information that is not stored in the base HR system ○ Pass in Succession information and use pre-built Succession templates.
Advantage	<ul style="list-style-type: none"> • Allows field mapping of required fields to create multiple charts needed from one data extraction, View, Query or Table

	<ul style="list-style-type: none"> • Chart Administrators can provide a comprehensive list of potential fields to the DBA. Once the extraction, View, Query or Table is generated, the chart administrator can map only the needed fields.
Disadvantage	<ul style="list-style-type: none"> • If additional fields are needed that are not in the View, Query or Table, the database owner will need to modify and include the fields at the end of the current View, Query or Table.
Reminder	<ul style="list-style-type: none"> • ODB compliant Data can be refreshed while the chart is open in OrgPublisher

8 What Do Most Customers Do?

Most customers use a 3 chart approach to meet the needs of the most common audiences. These are typically created with 3 separate data connections that contain the needed fields for each audience.

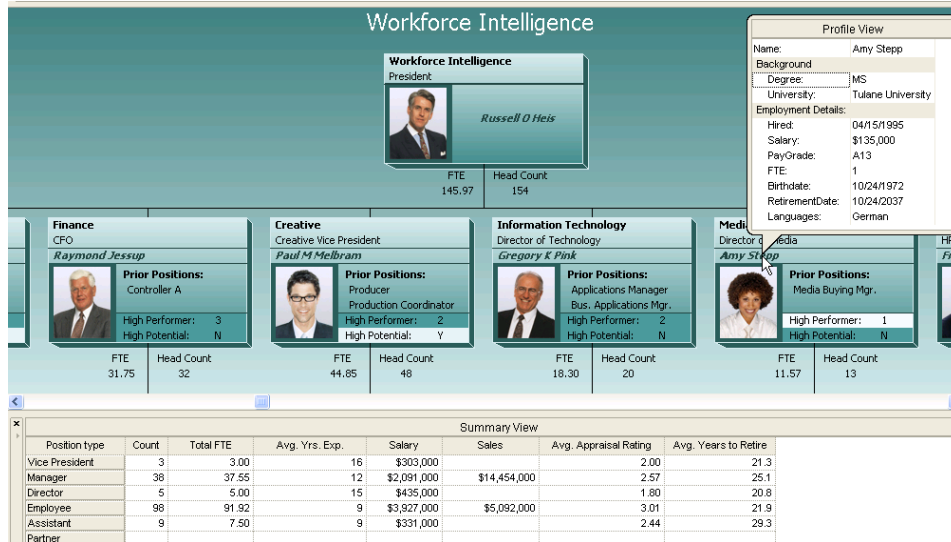
8.1 General Viewing Chart



8.1.1 General Viewing – Directory

First name:	Last name:	Preferred Na...	Job Title:	Box Title:	Phone:	Email:	Telecommuter:	Time Zone:
Amy	Stapp	Amy	Director of ...	Media Plan...	T/L1 6161	amy.stapp...		EST
April	Mennit	April	Product Sp...	National	T/L3 7799	april.mennit...	Y	CST
Bailey	Granger	Bailey	Receivable...	Accounting	T/L1 8900	bailey.gran...		PST
Bobbie	Johnson	Bobbie	Assistant t...	Executive S...	T/L1 5554	bobbie.joh...		PST
Bradley	Vick	Brad	Assistant A...	Local Sales ...	T/L2 5536	brad.vick@...		GMT
Brandi	Nelson	Brandi	Creative Di...	Creative Print	T/L1 1199	brandi.nels...		PST
Brian	Reynolds	Brian	Production ...	Production	T/L1 4544	brian.reyno...		PST
Brighton	Hentry	Brighton	Desktop Pu...	Support Staff	T/L1 6666	brighton.he...		PST
Cal	Kramer	Cal	Media Plan...	Media Plan...	T/L1 7171	cal.kramer...		PST
Candace	Green	Candy	Associate P...	Public Broa...	T/L1 5989	candy.gree...		PST
Candy	Sams	Candy	Human Res...	Human Res...	T/L1 8888	candy.sam...		PST
Carl	Best	Carl	Research M...	Market Res...	T/L3 2999	carl.best@...		CST
Carla	Yellmist	Carla	Research A...	Market Res...	T/L3 2200	carla.yellmi...		CST

8.2 Human Resources/Management Chart



8.3 Organizational Planning/Succession Planning Chart

