

# **OrgPublisher Bringing in the Data**



## **OrgPublisher 10 Training**

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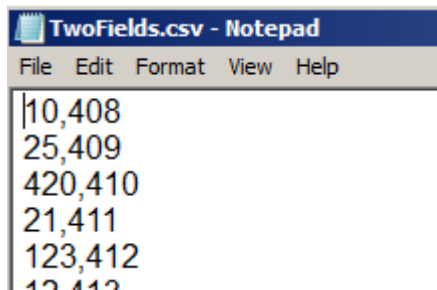
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## 1 Create a Chart – CSV File in OrgPublisher Specified Order

In order to create your first chart, you must have OrgPublisher installed and have access to your HR system or a data feed from your HR system. The *Before You Begin* document provided preliminary information on the methods for bringing data into OrgPublisher.

It is always recommended to start slow and build as you begin to bring data into OrgPublisher. OrgPublisher will check your data as was noted in the *Before You Begin* document. Hierarchy is the first check.

For the first chart, the simplest method for opening and viewing a chart will be utilized – CSV File in the OrgPublisher Specified Order. You can begin with just the hierarchical data – the **Parent Box ID** and the **Box ID**. If the file is viewed in Notepad, it looks something like this:



```

10,408
25,409
420,410
21,411
123,412
42,412
    
```

Create this file with your own HR data and place it in the folder you can access.

**Web Administration:** The file should be placed on the server where OrgPublisher Web Administration is installed. Typically, this is the SourceCharts folder on the server:

**C:\inetpub\wwwroot\opweb\SourceCharts .**

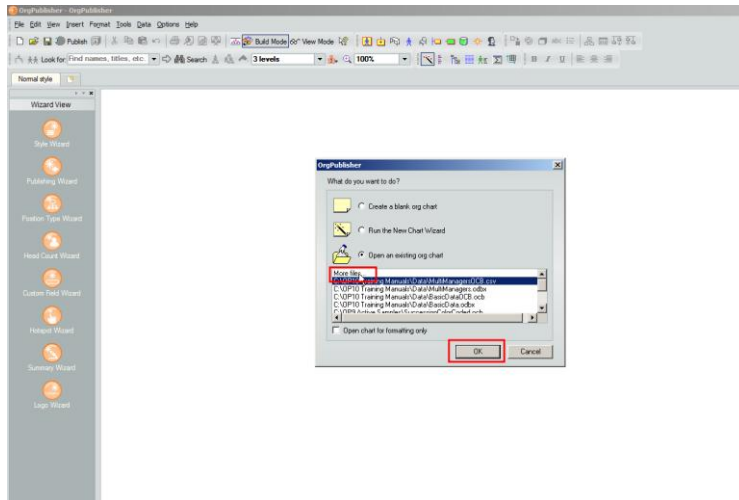
### 1.1 Launch OrgPublisher – Open an Existing Chart

To launch OrgPublisher, follow the steps below for your installation.

#### Client Launch:

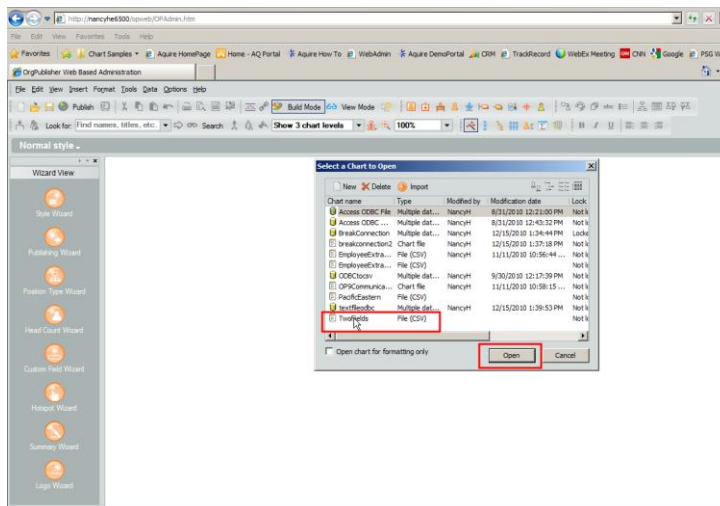
1. Double click on the OrgPublisher icon on your desktop or on the server desktop as instructed by your IT organization.
2. Click on **More files . . .**, and then browse to the .csv file containing the Parent Box ID and the Box ID.

### 3. Click **Open**.

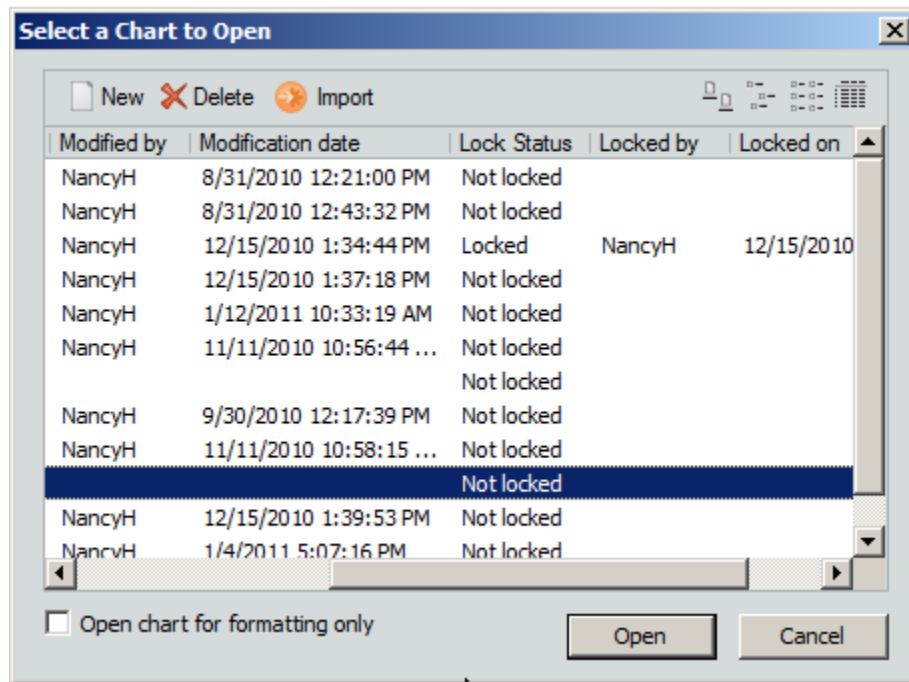


### Web Administration Launch:

1. Web Administration – Click the link provided by your IT group.
2. Locate the file containing the Parent Box ID and the Box ID.
3. Click **Open**.



- a. OrgPublisher Web Administration allows multiple chart administrators to access and modify charts stored in a common area of the server. To view the status of a chart, scroll to the right in the chart list window. From here you can see if a chart is locked, who has it locked, and when they locked it.

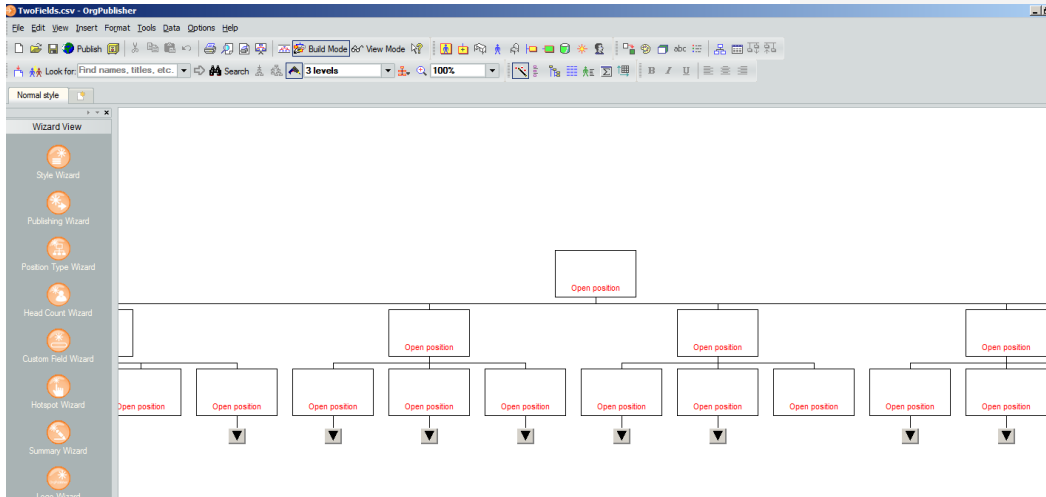


- b. **Read-Only Charts** - If a chart is locked, you can open it as Read-Only. Select the chart and then click on Open. You will see the following message. Click on Open Read-Only to continue.



### 1.1.1 Opened Chart – 2 Fields

Whether you opened your chart data in Web Administration or the Client, you will see something similar to the example below.



Hopefully, you did not have any data errors as noted in the *Data Errors* section of the *Before You Begin* manual. If you did, click OK so you can get into the chart. In the next step more data will be brought in to help you assess the type of data errors in your chart. Before more data is added, please review the information below.

## 1.1.2 Build Mode vs. View Mode

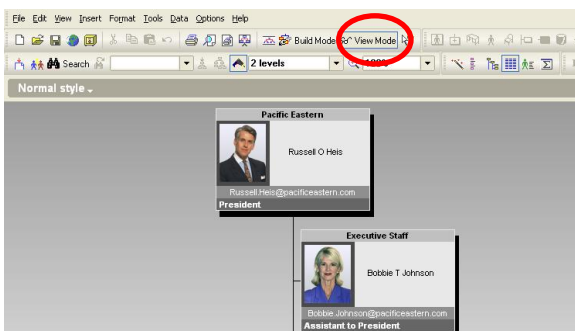
OrgPublisher is indicating that you are in **Build Mode**. Build Mode is an editing mode. When you are in this mode, you are not connected to your data. This mode allows changes to the text in the chart boxes – including hierarchical changes.



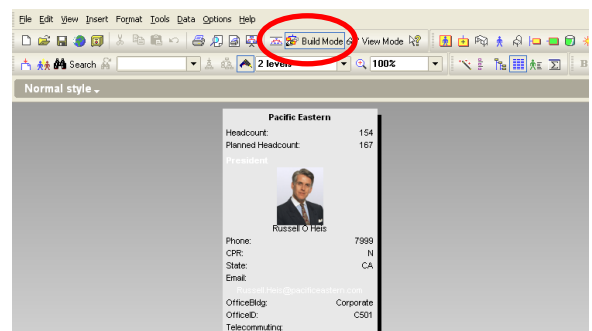
**Please Note:** If you make hierarchical or text changes and pull a new data extract afterwards, you will overwrite your data file and lose your changes. This method should only be used for quick fixes when data cannot be readily retrieved from the HR source.

- View Mode displays the chart as it will look on the intranet. It is exactly what the chart viewer will see.
- Build Mode displays all fields within the chart and allows editing.
- Build Mode displays *all* custom fields assigned to the box.
- If an ODBC (.odbx file) connection was created, OrgPublisher will save the data into an .ocb file. Any data changes made will be stored in the .ocb. You cannot refresh an .ocb file.

### View Mode



### Build Mode

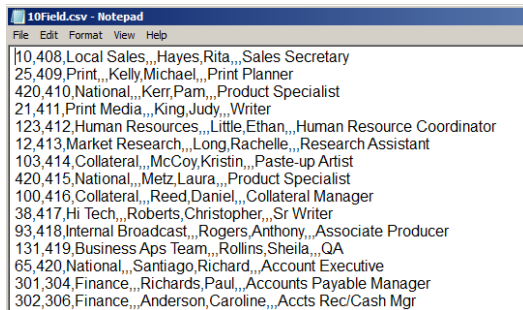


### 1.1.3 Open Chart with Additional Fields

Continue to add fields to your chart/data extraction. At this point, we will continue using the *CSV File in the OrgPublisher Specified Order* method for creating chart data. In the examples below, the following fields are passed into OrgPublisher:

- Parent Box ID (Field 1, Column A)
- Box ID (Field 2, Column B)
- Department Name (Field 3, Column C)
- Last Name (Field 6, Column F)
- First Name (Field 7, Column G)
- Job Title (Field 10, Column J)

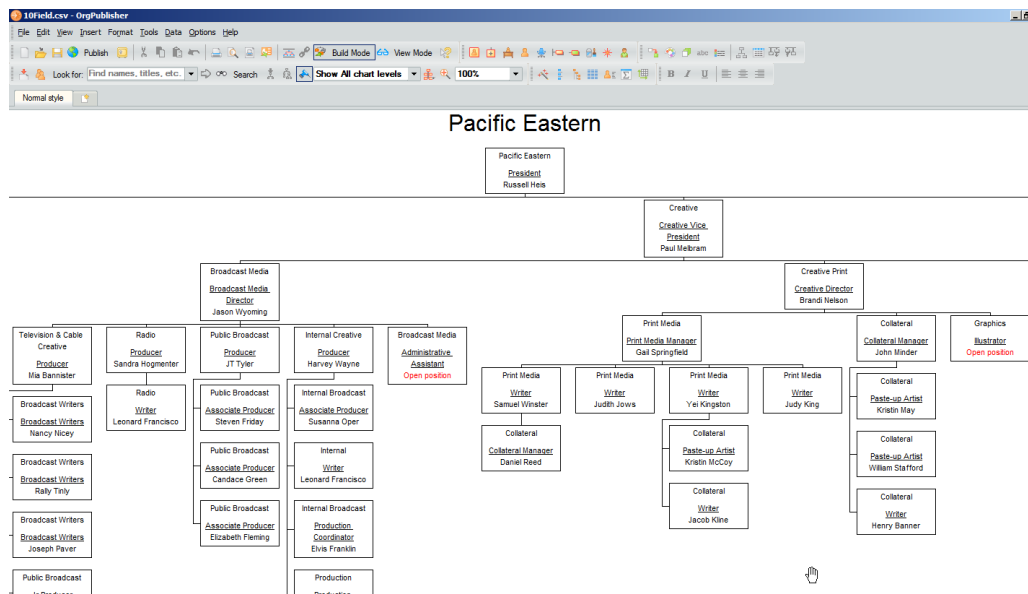
#### Notepad



#### Microsoft Excel

	A	B	C	D	E	F	G	H	I	J
1	10	408	Local Sales			Hayes	Rita			Sales Secretary
2	25	409	Print			Kelly	Michael			Print Planner
3	420	410	National			Kerr	Pam			Product Specialist
4	21	411	Print Media			King	Judy			Writer
5	123	412	Human Resources			Little	Ethan			Human Resource Coordinator
6	12	413	Market Research			Long	Rachelle			Research Assistant
7	103	414	Collateral			McCoy	Kristin			Paste-up Artist
8	420	415	National			Metz	Laura			Product Specialist
9	100	416	collateral			Reed	Daniel			Collateral Manager
10	38	417	Hi Tech			Roberts	Christopher			Sr Writer
11	93	418	Internal Broadcast			Rogers	Anthony			Associate Producer
12	131	419	Business Aps Team			Rollins	Sheila			QA
13	65	420	National			Santiago	Richard			Account Executive
14	301	304	Finance			Richards	Paul			Accounts Payable Manager
15	302	306	Finance			Anderson	Caroline			Accts Rec/Cash Mgr
16	55	220	Payroll			Pearson	Laney			Payroll Administrator
17	63	132	National			Amster	Gail			Product Specialist
18	22	117	Collateral			Banner	Henry			Writer
19	7	17	Television & Cable Creative			Bannister	Mia			Producer
20	25	115	Broadcast			Bates	James			Broadcast Media Planner

It is much easier to see the data when viewing it within Excel. If you open your extraction in Excel, be sure to save it as a .csv file. Place this file in the appropriate location for your Administration install and open it in OrgPublisher. If you do not have data errors you should see a file that looks similar to this:



As a refresher, the reason that Open Positions are displayed in this sample is because the data represents a Position to Position hierarchy.

If your data has errors, it should be much easier to tell who the people are with the errors now that you have more data. Follow the information provided in the *Data Errors* section of the *Before You Begin* manual to copy, paste into Excel and then work on the errors.

## 1.2 Launch OrgPublisher – Create a New Chart

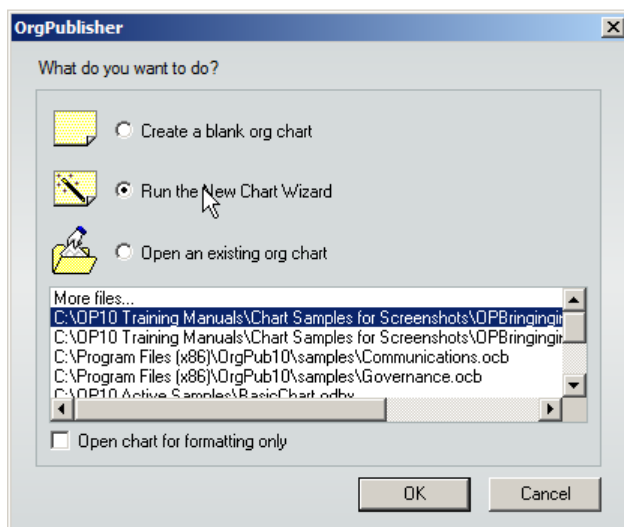
As noted in the Before You Begin manual, there are several ways to bring data into OrgPublisher. This section discusses creating a new chart using the New Chart Wizard.

### 1.2.1 Creating Charts with an ODB Compliant Database

If you will be connecting to an ODB compliant database, the New Chart Wizard will walk you through each step to create the connection.

#### Client Launch:

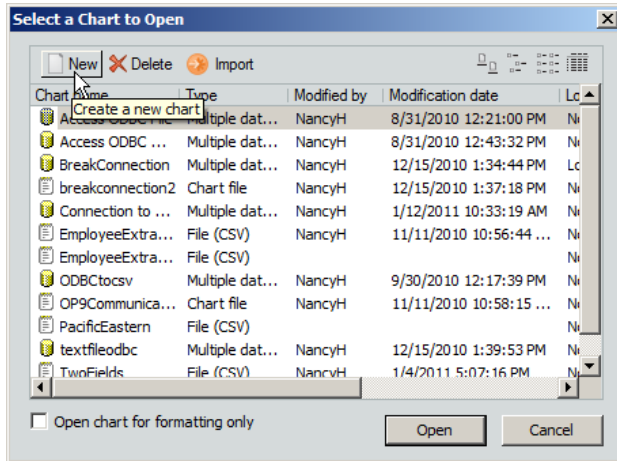
1. Double click on the OrgPublisher icon on your desktop or on the server desktop as instructed by your IT organization.
2. Select Run the New Chart Wizard.



#### Web Administration Launch:

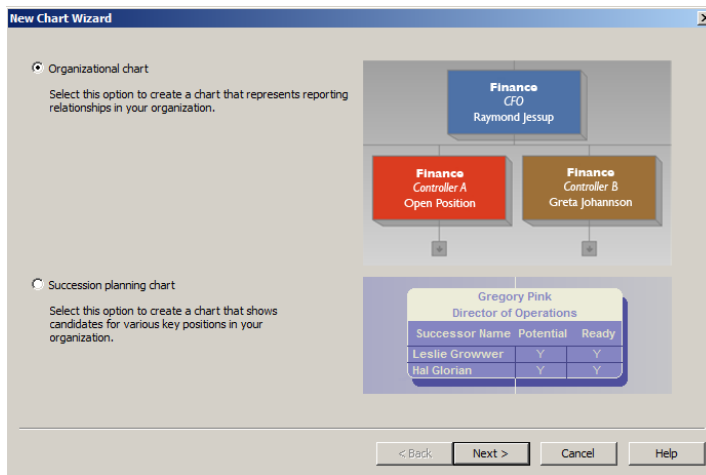
1. Web Administration – Click the Link provided by your IT group.

2. Select New.



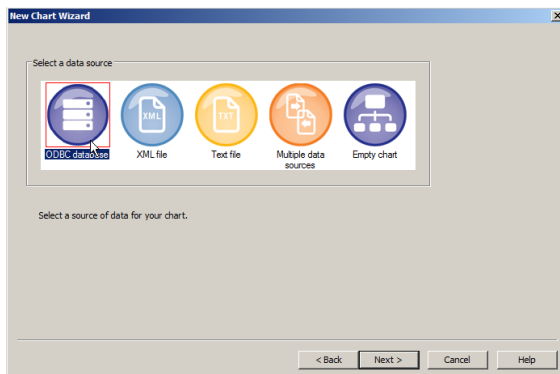
**Client and Web Administration:**

3. Select Organizational chart.

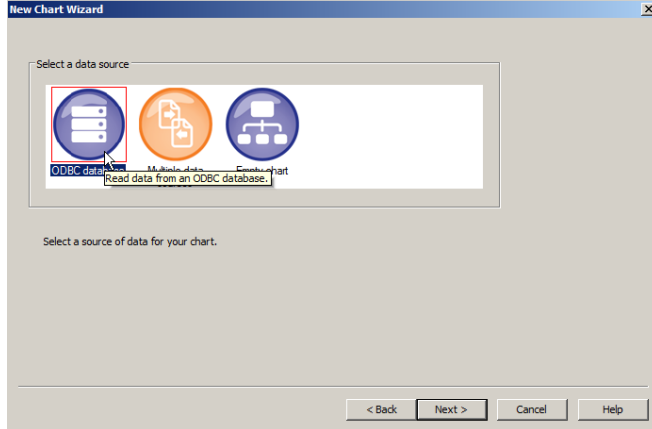


4. Select ODBC Database, and then click Next.

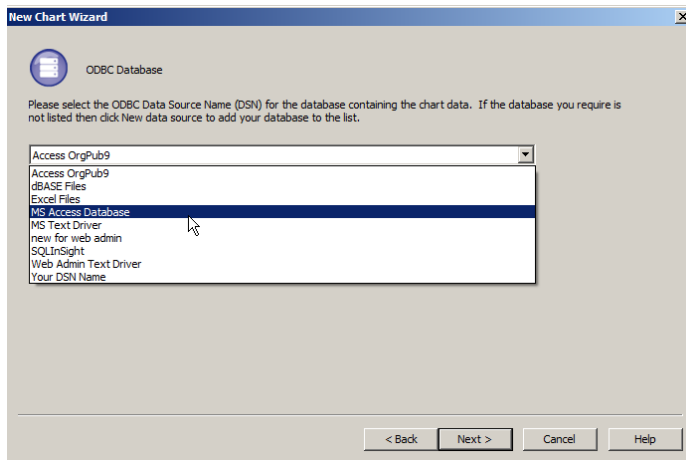
**Client:**



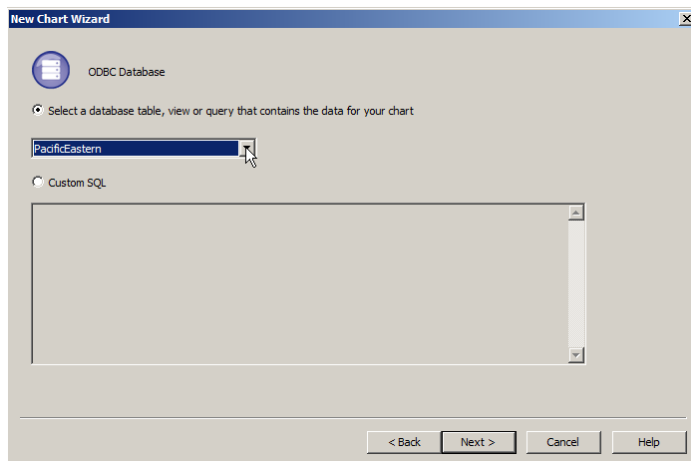
## Web Administration:



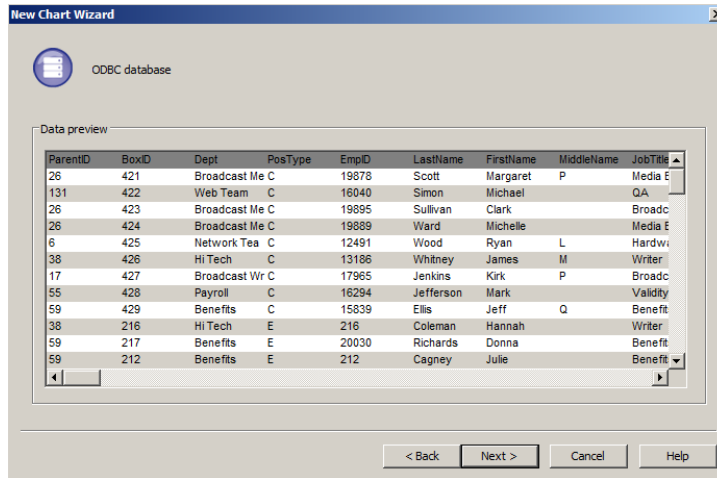
5. Select an existing DSN to access the database or create a new DSN, if needed. Click Next.



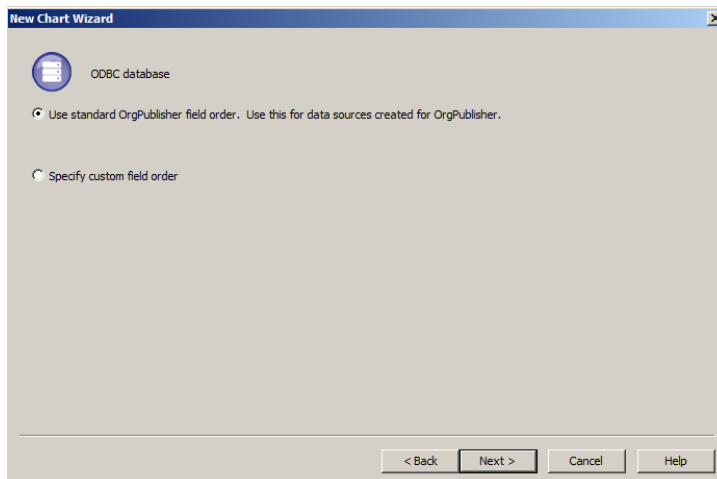
6. Select the table, query or view to be used or select Custom SQL to write your own SQL statement.



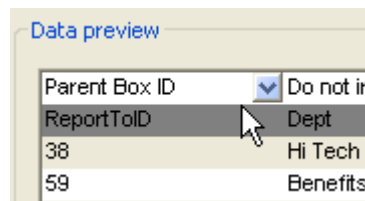
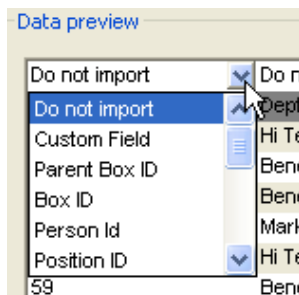
- If you selected a database table, view or query, the first 100 records will be displayed in a data preview window.



- If the table, view, or query selected is not laid out in the standard OrgPublisher field order, select Specify custom field order. This provides the mapping option. If the data is laid out in the correct field order, than select Use standard OrgPublisher field order.

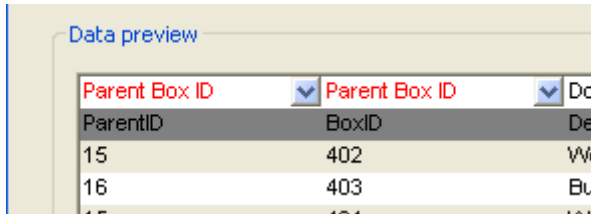


- Above each column of data, a drop down arrow appears with the default selection of **Do not import**. Click the drop down arrow to display other field options. Select the appropriate option for the field/column of data.

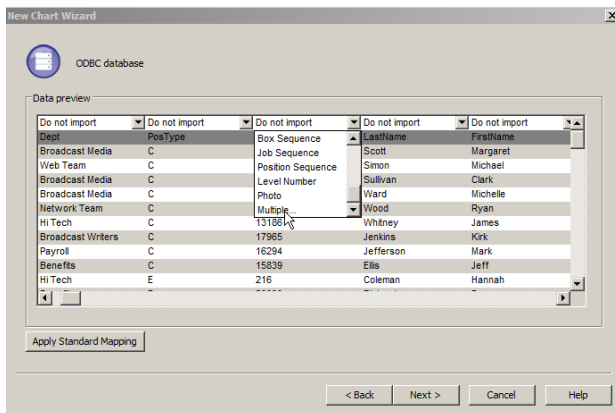


10. As you select the field options in the drop down list and move to subsequent columns, the previously selected mappings are faded or greyed out. This indicates that you have already identified a field/column for this type of field.
11. If a field type (other than Custom Field) is used more than once, the field type will switch to red text. Duplicate usage of a field type should be limited to Custom Fields. Click Next.

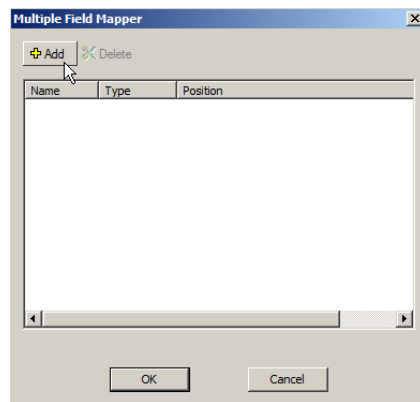
**Please note:** Each Field/Column can only have one field type selected.



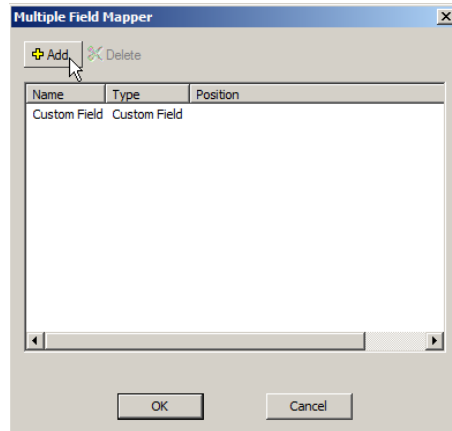
12. You may need to map a single column of data as more than one field type. For instance, you have a column of data that contains the Employee Number. You want to use it as Field 5 (Person ID) and you want to display the field in the chart as a custom field. Scroll down to the last option - **Multiple . . .** and click to select.



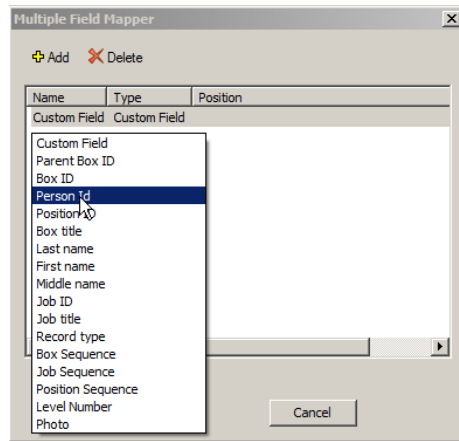
a. The Multiple Field Mapper displays.



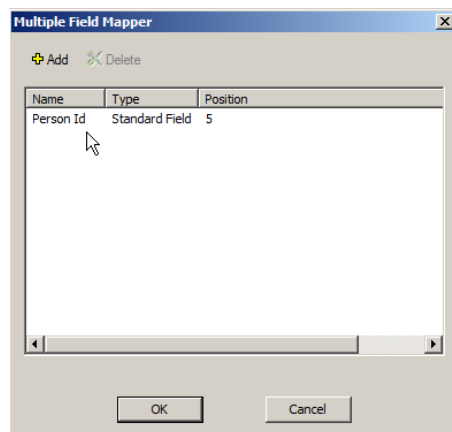
- b. Click Add. The Mapper will insert Custom Field as the first mapping.



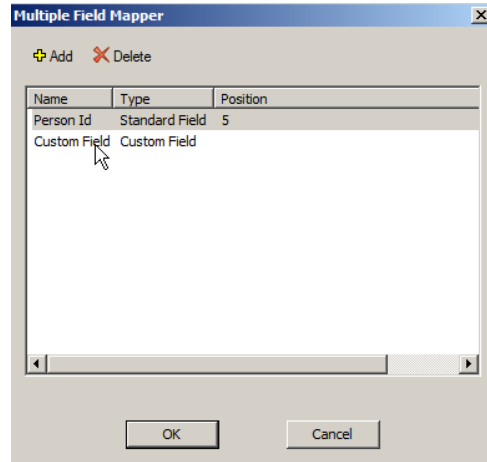
- c. Click on Custom Field (under the Name column) to display all of the options available.



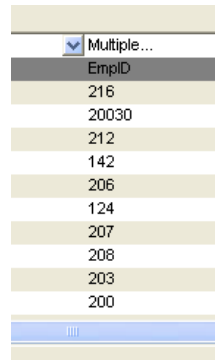
- d. After changing the Field type information, click on Add to add the second mapping.



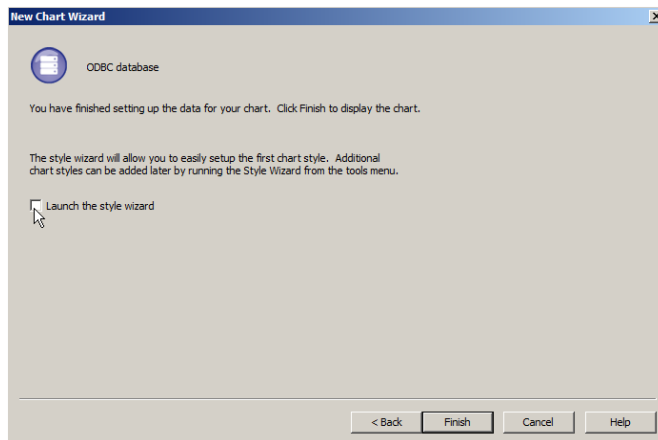
- e. Click OK when you are finished with your mapping selections.



- f. The mapped column is now labeled as Multiple.



13. Click Next. Click to remove the check mark by *Launch the style wizard* and then Finish  
**Please note:** By default, there is a check mark beside Launch the style wizard. It is recommended that as you first begin to use OrgPublisher and field mapping, you focus on the data fields. You can run the Style Wizard once you have the data you need in the chart.



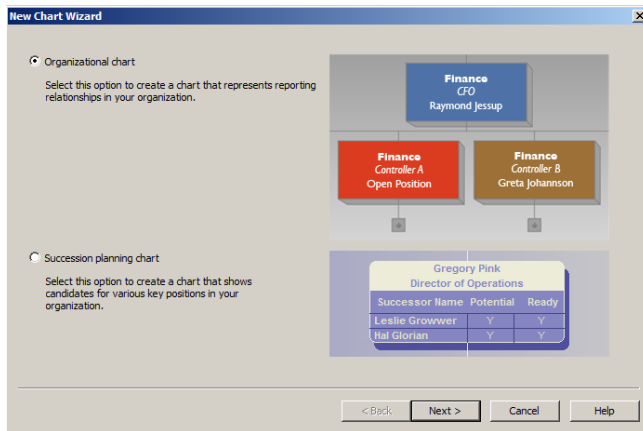
14. The chart is displayed.
15. Save the file. It will have an **.odbx** extension.  
**Please note:** **.odbx** means that the fields have been mapped by the user. **.odb** means that the fields have not been mapped by the user.

### 1.2.2 Creating Charts with a Comma Separated File in No Specific Order

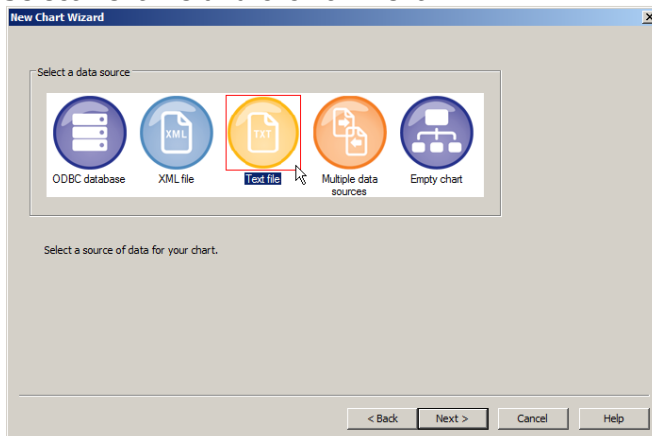
**Please Note:** This option is not available in Web Administration.

If you will be connecting to a text file that is not laid out in the order specified by OrgPublisher, the New Chart Wizard will walk you through each step to create a connection and map the fields. As a reminder, this method only works from the OrgPublisher Client.

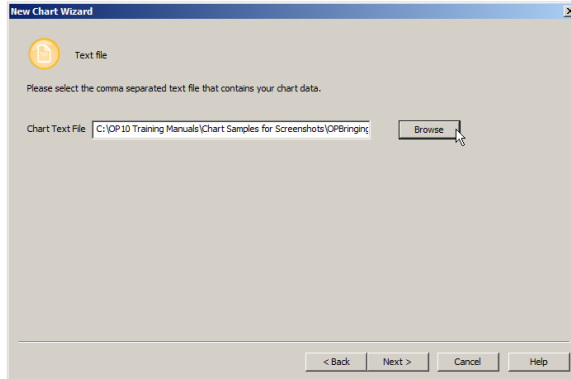
1. Launch the New Chart Wizard.
2. Select organizational chart.



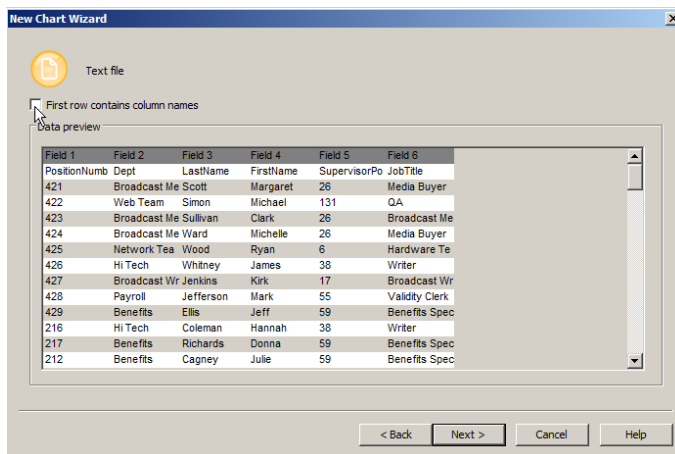
3. Select Text file and click on Next.



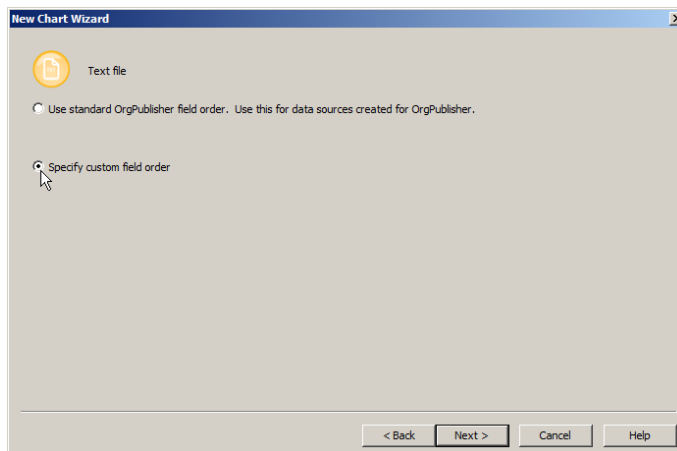
- Use the Browse button to locate the .txt, .csv or .ocb file. Click Next.



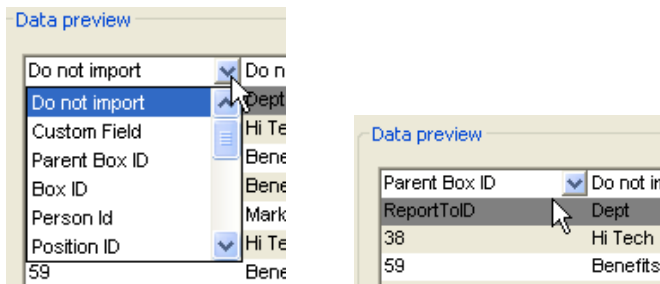
- If the text file contains a header row, select First row contains column names.



- If the data source is laid out in the specified order OrgPublisher requires, select Use standard OrgPublisher field order. If the fields are not in the standard order, select Specify custom field order. Click Next.

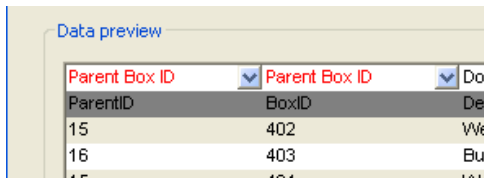


- Above each column of data, a drop down arrow appears with the default selection of **Do not import**. Click the drop down arrow to display other field options. Select the appropriate option for that field/column of data.

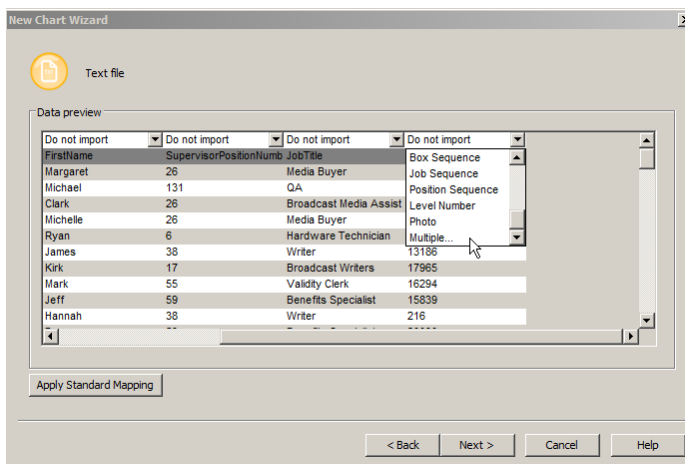


- As you select the field options in the drop down list and move to subsequent columns, the previously selected mappings are faded or greyed out. This indicates that you have already identified a field/column for this type of field.
- If a field type (other than Custom Field) is used more than once, the custom field type will switch to red text. Duplicate usage of a field type should be limited to Custom Fields. Click Next.

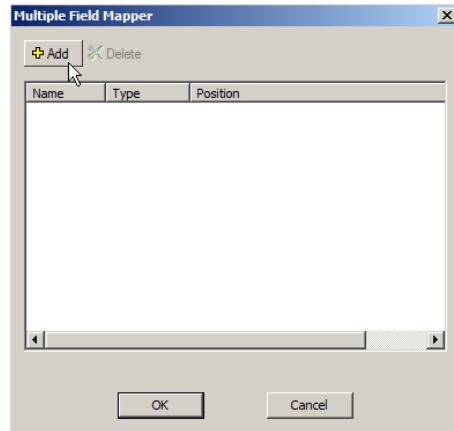
**Please note:** Each field/Column can only have one field type selected.



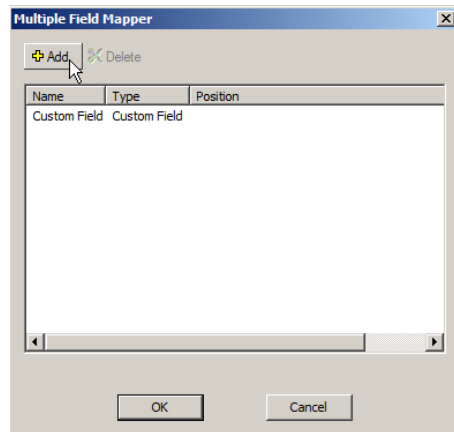
- You may need to map a single column of data as more than one field type. For instance, you have a column of data that contains the Employee Number. You want to use it as Field 5 (Person ID) and you want to display the field in the chart as a custom field. Scroll down to the last option - Multiple . . . and click to select.



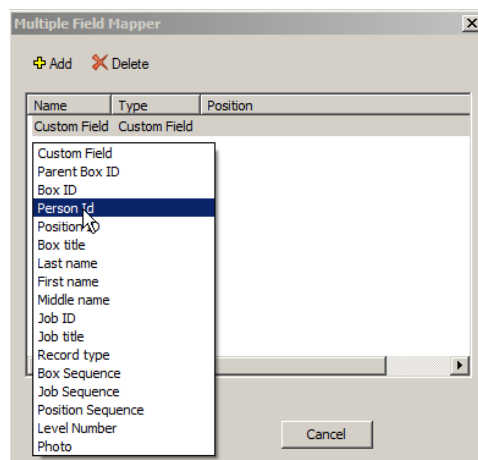
a. The Multiple Field Mapper displays.



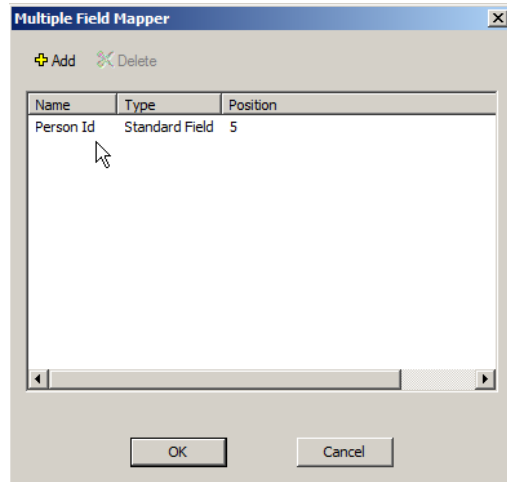
b. Click Add. The Mapper will insert Custom Field as the first mapping.



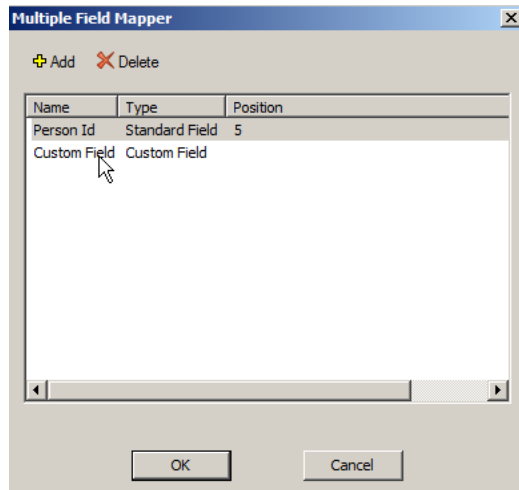
c. Click on Custom Field (under the Name column) to display all of the options available.



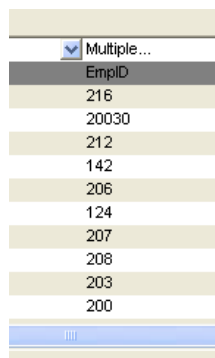
- d. After changing the Field type information, click on Add to add the second mapping.



- e. Click OK when you are finished with your mapping selections.

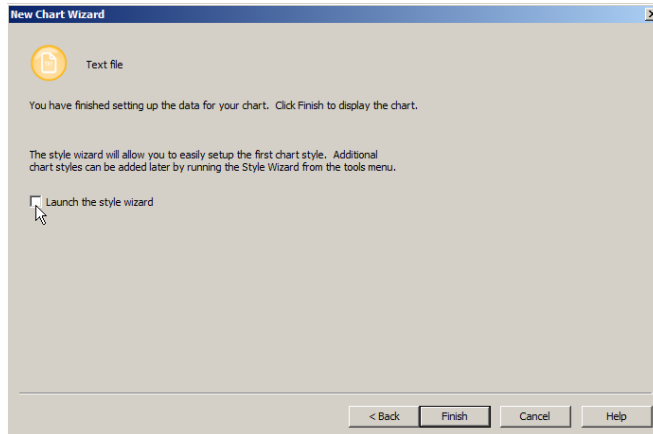


- f. The mapped column is now labeled as Multiple.



- Click Next. Click to remove the check mark next to *Launch the style wizard* and click the Finish button.

**Please note:** By default, there is a check mark beside Launch the style wizard. It is recommended that as you first begin to use OrgPublisher and field mapping, you focus on the data fields. You can run the Style Wizard once you have the data you need in the chart.



- The chart is displayed.
- Save the file. It will have an **.odbx** extension.

**Please note:** **.odbx** means that the fields have been mapped by the user. **.odb** means that the fields have not been mapped by the user.

### 1.2.3 Creating Charts with a Comma Separated in the Required Order

This details how to open a .csv file from your HR data source that has been generated using the order required by OrgPublisher (as detailed in the *Before You Begin* manual).

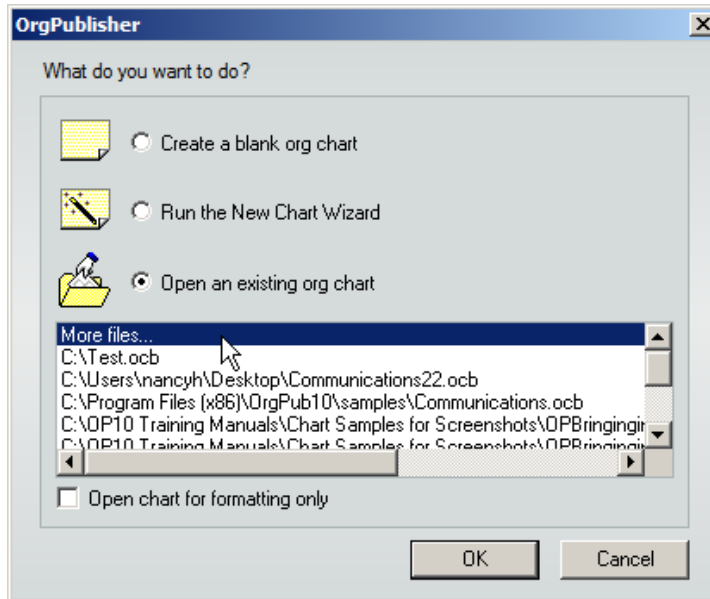
As a reminder: Whether using the Client or Web Administration, the .csv file, each time it is updated, should be:

- Named the same
- Stored in the same location

#### Client Launch:

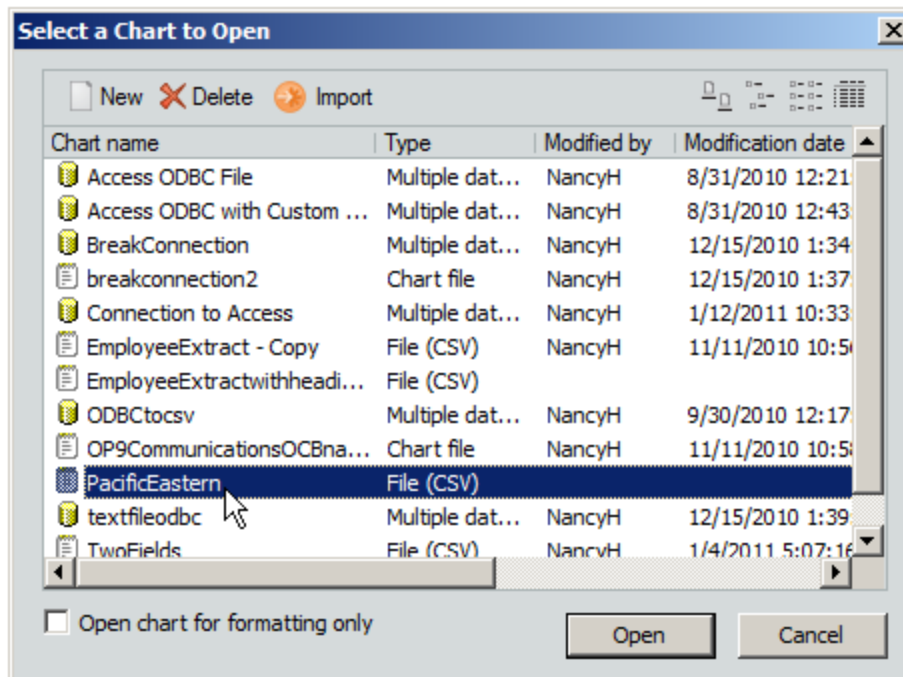
- Double click the OrgPublisher icon on your desktop or on the server desktop as instructed by your IT organization.
- Scroll through the list of recently opened files and then click to select the desired file. Click OK to open the file.

- If you do not see the desired file, select **More files** and then click OK. You will then navigate to the file location to open.



### Web Administration Launch:

- Click the Link provided by your IT group.
- Select the file.
- Click **Open**.

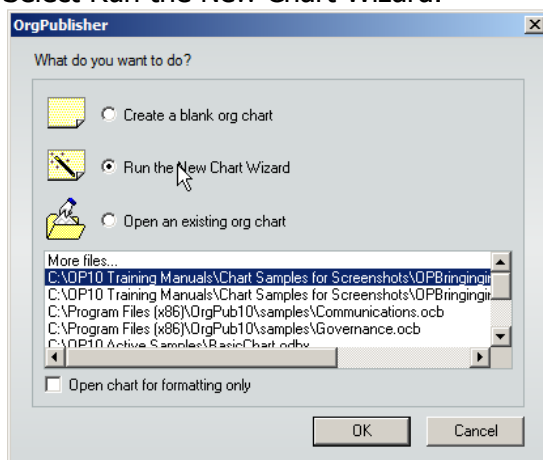


## 1.2.4 XML

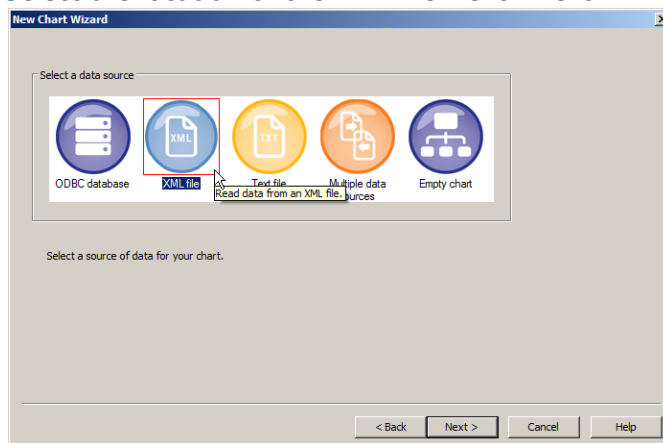
Using an XML data feed is not a common method used by Aquire customers. However, it is available from the OrgPublisher Client.

**Please note:** The XML file must have the fields provided in the order required by OrgPublisher because mapping is not available with this option. Also, this option is not available in Web Administration.

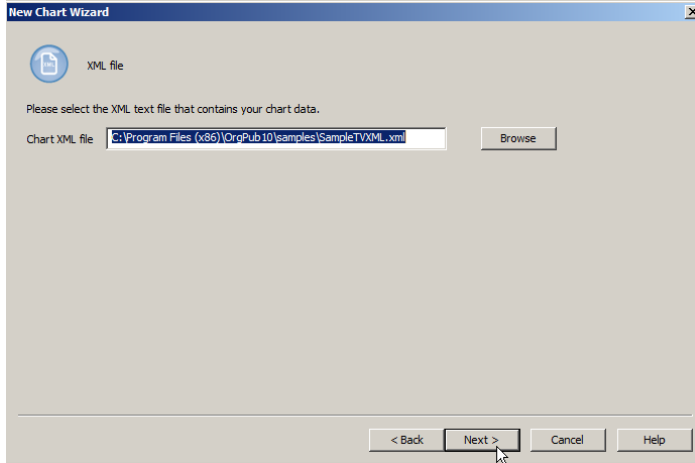
1. Double click on the OrgPublisher icon on your desktop or on the server desktop as instructed by your IT organization.
2. Select Run the New Chart Wizard.



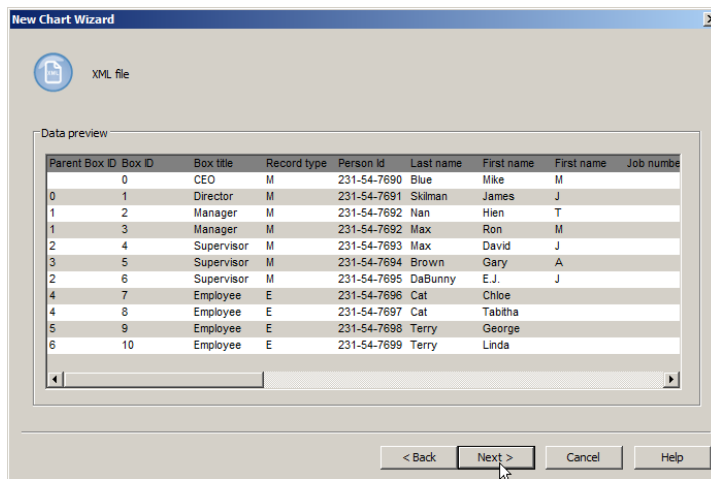
3. Select the location of the XML file. Click Next.



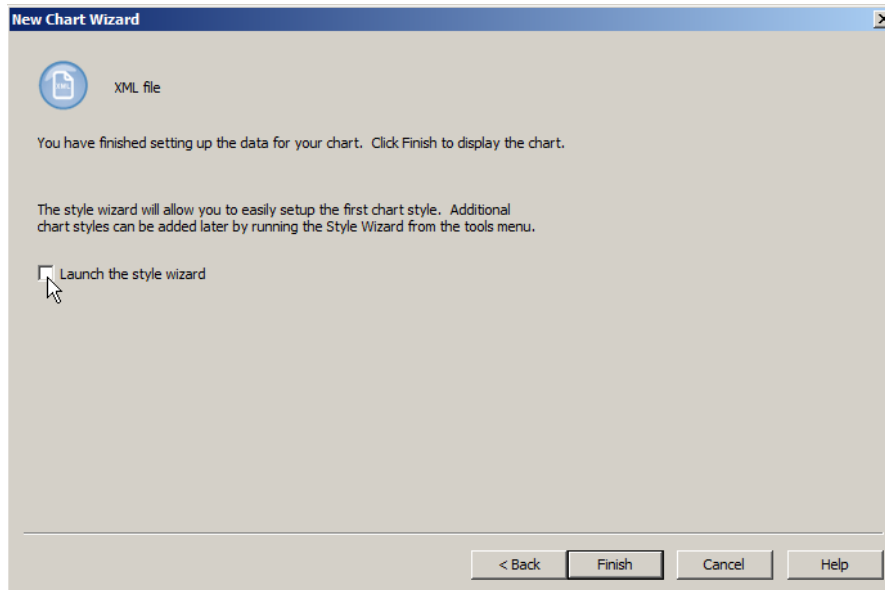
4. Locate the XML Text File by using the Browse button. Click Next.



5. The first 100 fields of data will display. Click Next.



6. Click to remove the check mark by *Launch the style wizard* and then Finish.  
**Please note:** By default, there is a check mark beside Launch the style wizard. It is recommended that as you first begin to use OrgPublisher and field mapping, you focus on the data fields. You can run the Style Wizard once you have the data you need in the chart.



7. The chart is displayed.
8. Save the file. It will have an **.odb** extension.  
**Please note:** **.odbx** means that the fields have been mapped by the user. **.odb** means that the fields have not been mapped by the user.

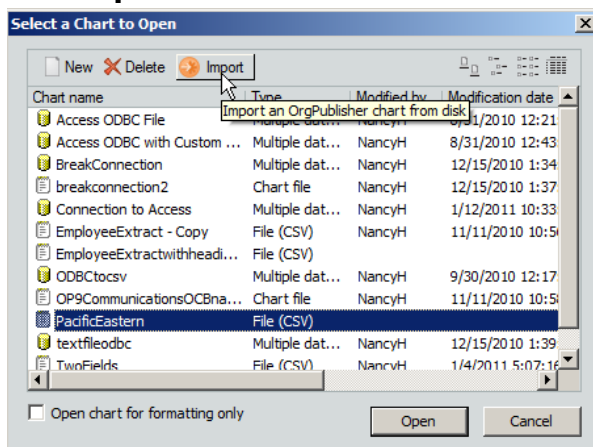
## 1.2.5 Import

**Please Note:** This option is not available in the Client.

The Import option lets the chart administrator bring in a comma separated file that is laid out in the order specified by OrgPublisher. **This is a one-time only import.**

If the data is to be updated on a regular basis, then the most current .csv file should be given the same file name and placed in the SourceCharts folder on the Web Administration server.

1. Click the Link provided by your IT group.
2. Click **Import**.



## 2 Multiple Data Sources

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OrgPublisher accepts data from more than one data source. This is best accomplished by building the connection to the additional data sources using the OrgPublisher Client. The built-in New Chart Wizard prompts the user to pull the data via ODB, a Text file or XML.

There are 3 reasons you might want to bring in additional data:

- Adding additional boxes, persons or positions
- Adding additional custom fields for records that exist within the primary data source
- Adding succession candidate records that will link to records that exist in the primary data source. These records will automatically have their position type set to Successor.

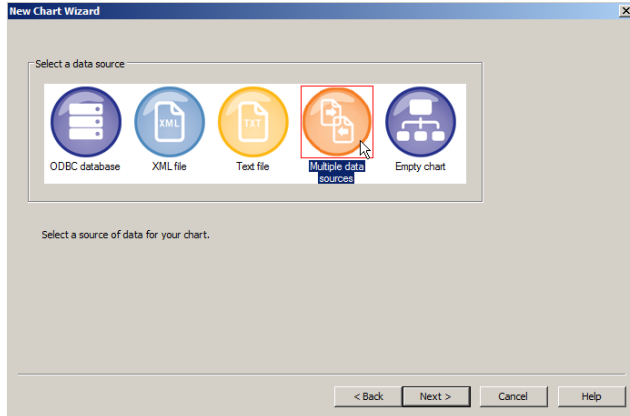
### **Please Note:**

1. With Web Administration, if the secondary data source is a .csv file or XML, the owner of the server can log on and create the connection using the Client. This connection can be accessed by the Chart Administrator via Web Administration.
2. It is not necessary to make the decision that you will need Additional Data sources at the time you create a New Chart. Additional Data sources can be added later.
3. If established data feeds are modified to add additional custom fields in the future, these fields should be added at the **end** of the data feed. Do not insert additional fields "between" existing fields.

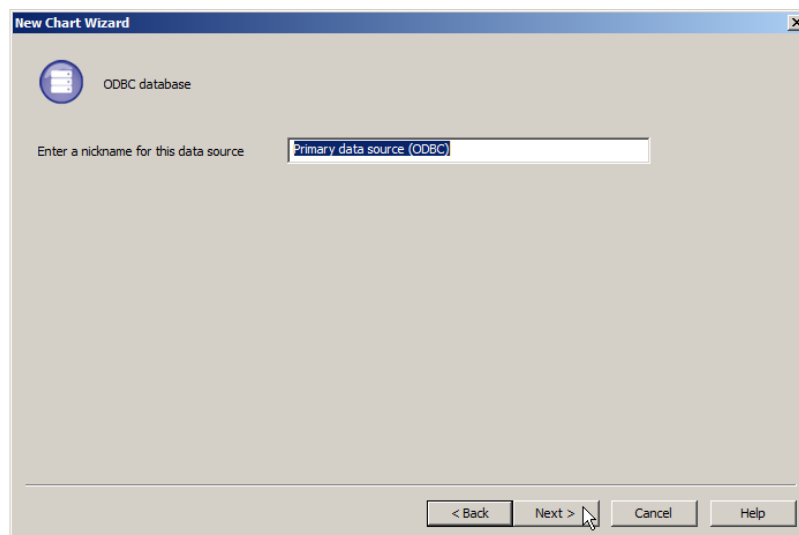
### **2.1 Adding Additional Records**

This option allows you to bring in more records from another data source. This could be a list of your contractors, temps or interns. It might be employees from areas outside of the country who do not use the same HR system. The key to this data is to have Parent Box ID's that EXIST in the Primary Source or the Secondary Source. This is the only way that OrgPublisher can attach the additional record to the primary chart.

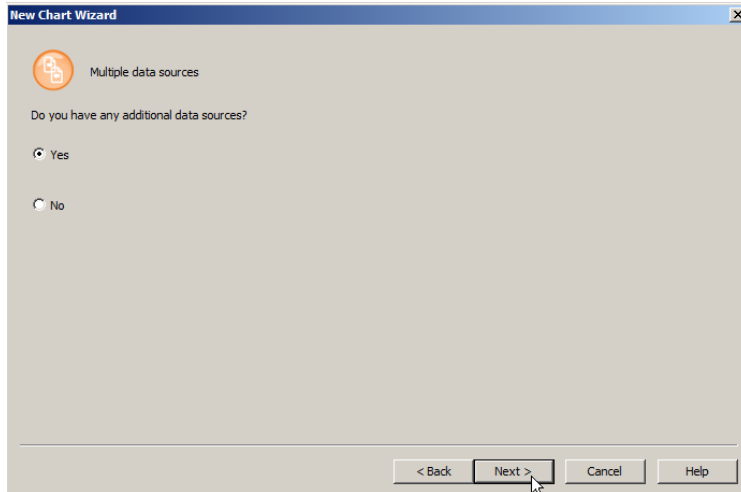
1. Open OrgPublisher and start the New Chart Wizard
2. When prompted to select a data source, select Multiple data sources.



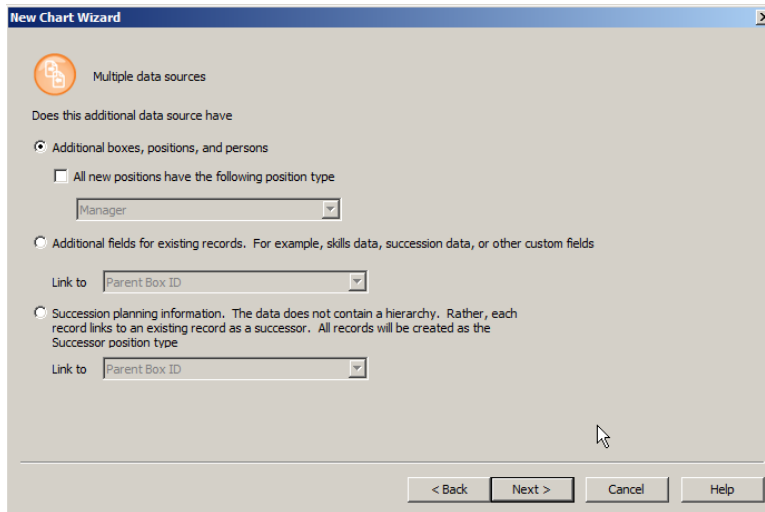
3. You will be prompted to select the primary data source as noted in the *Launch OrgPublisher – Create a New Chart* section of this document. Follow the steps for the type of data source you are using for the Primary Data.
4. After the source is identified and fields to use are defined, you will be prompted to provide a nickname for this data connection setup. Click Next.



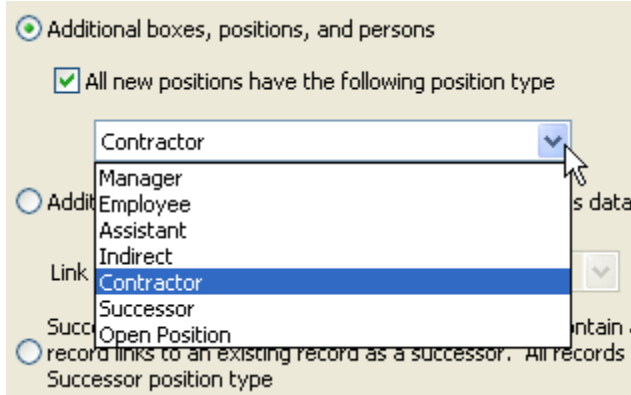
5. OrgPublisher will ask if you have an additional data source. Select Yes, then Next.



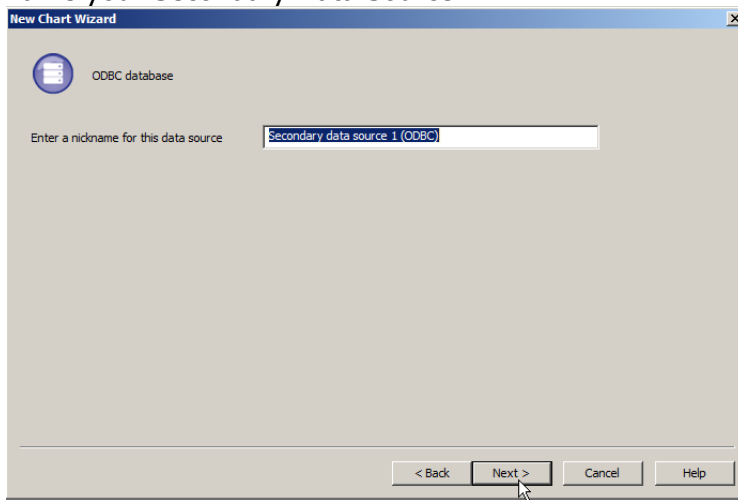
6. Select what type of data the additional data source contains. In this example, the 'Additional boxes, positions, and persons' option has been selected.



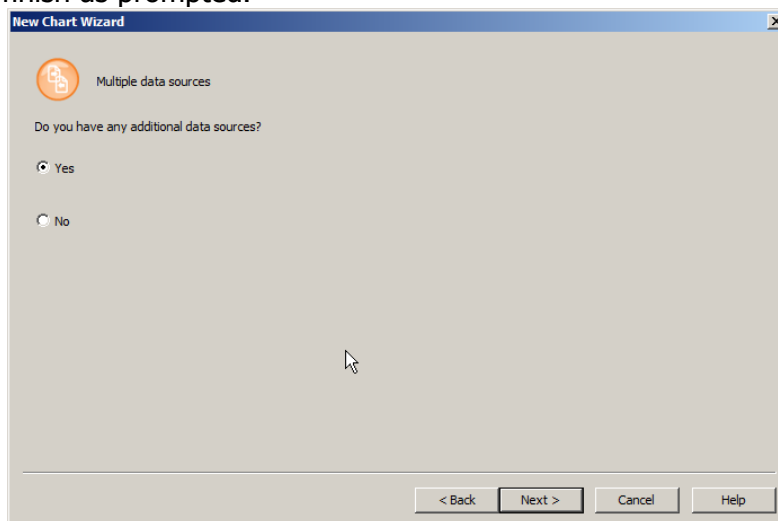
7. The new records can be assigned a Position Type, if desired. Click to select 'All new positions have the following position type'. This activates the Position Type drop down list. Click on the down arrow and select the desired Position Type. Click Next to continue.



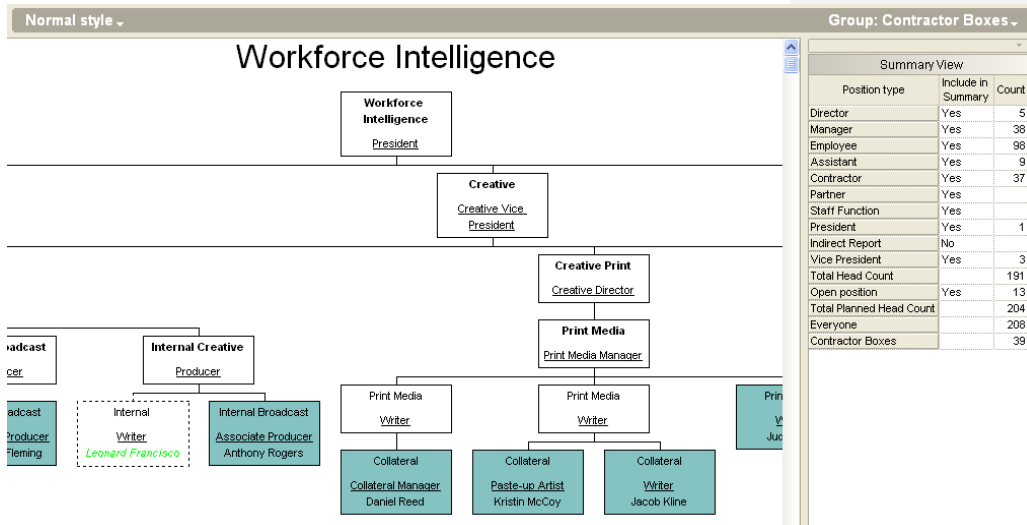
8. You will be prompted to map your fields.
9. Name your Secondary Data Source.



10. You will be prompted to select your next data source. If you are finished, select No and finish as prompted.



11. The chart opens with the combined data sources. This example shows the Contractor boxes formatted. It also shows the head count for contractors.

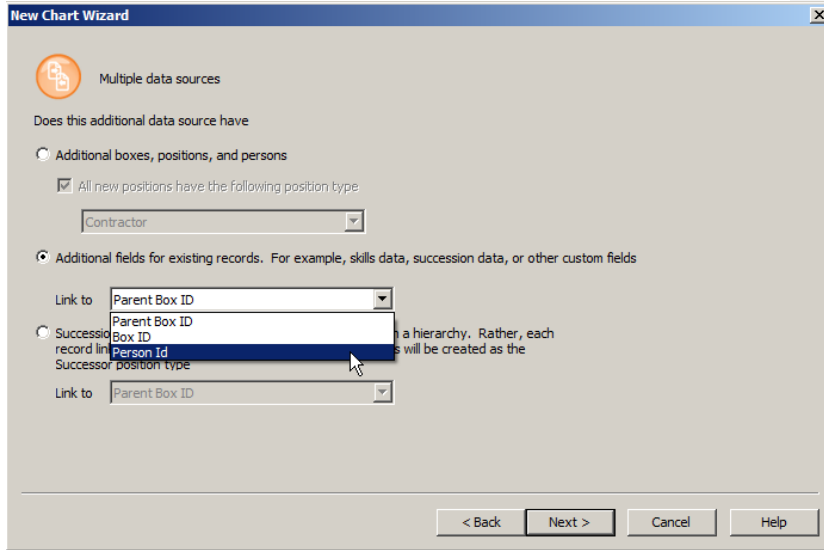


## 2.2 Add Fields of Data from an Additional Data Source

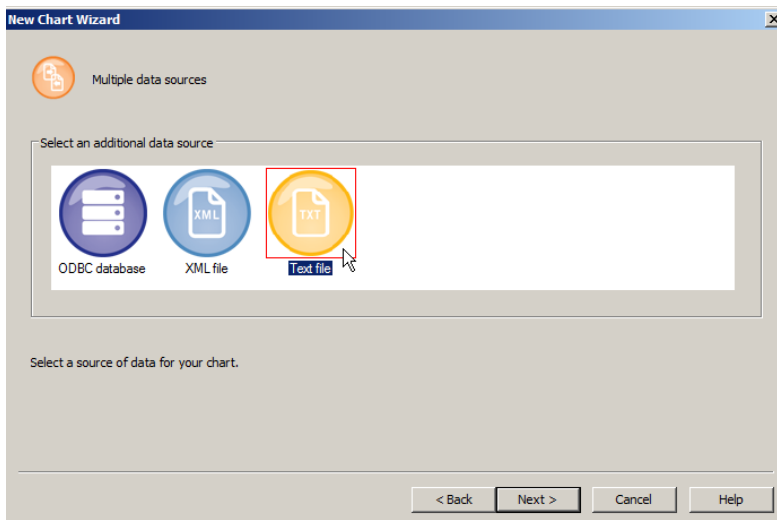
The next option within Multiple Data Sources is to add fields of data for the existing records in your primary data source. An example might be that your primary data source has HR related data (position id, hire date, etc). You also have an asset system that shows what equipment is assigned to an employee.

The primary data source contains the Employee ID – so does the asset database. Create an ODBC connection through the New Chart Wizard or point to a text or XML extraction from the asset database. The text, XML, or ODBC mapping should contain the fields from the asset database to be added to the primary source records AND the Employee ID.

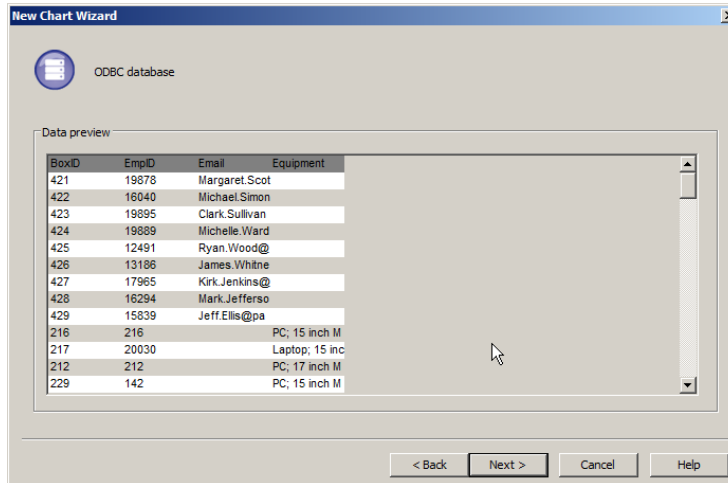
1. Open the New Chart Wizard and select Multiple Data Sources.
2. Create your Primary data source connection.
3. When prompted for more sources, click Yes.
4. Select Additional Fields for existing records. Click on the drop down to indicate the field in the Primary data source that also exists in the data source you are adding. This creates the relationship between the 2 data sources. Additional fields can now be related to the existing data record. Click Next.



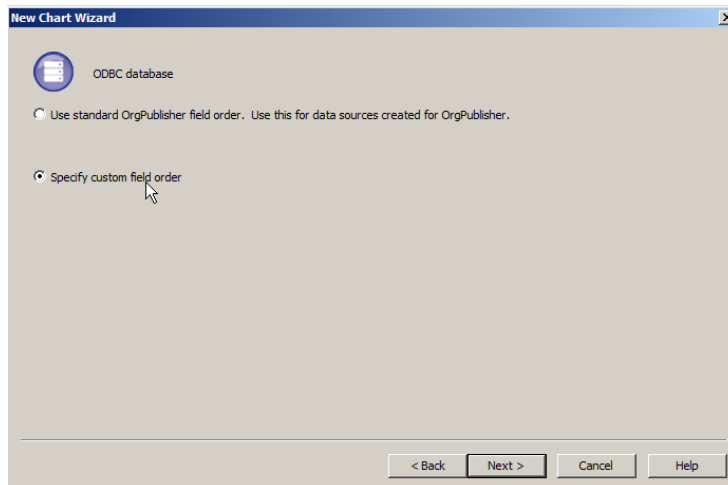
5. Select the type of data source. This can be an ODBC, XML or Text file. Click Next.



6. Select the type of data source and click Next. You will see a preview of the data. Click Next.

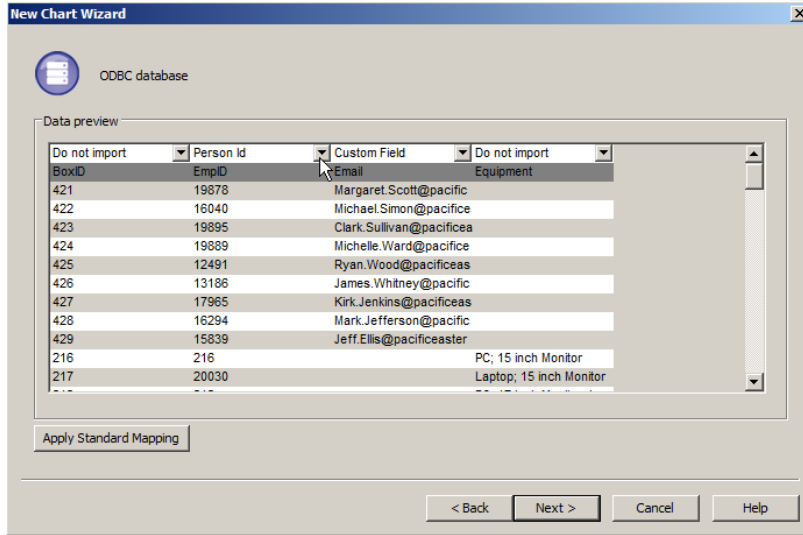


7. Select that you want to **Specify custom field order**. Click Next.

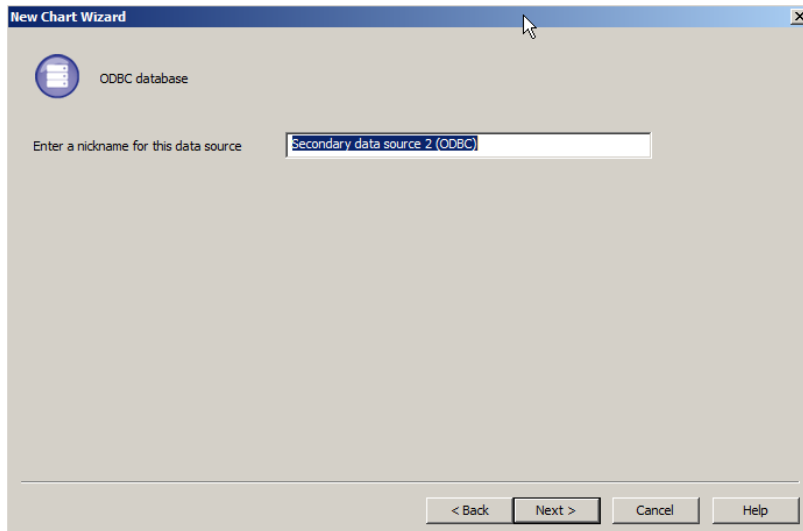


8. Map the fields as noted in the Text File section of the manual. Typically, the additional fields are **Custom Fields**. Please see the **Custom Fields** manual for more information. Click Next.

**Please note:** You will need to map the field that relates back to the existing data in the Primary Source.



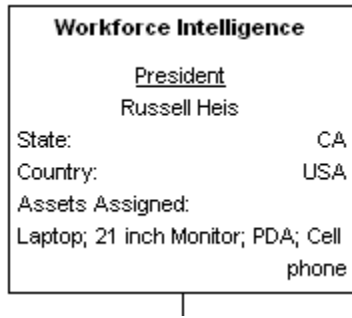
9. Type in a nickname for the secondary source, and click Next.



10. If you have more sources to add, select Yes and click Next. The process of adding the third source will begin. If not, click Next until you finish adding this data source.

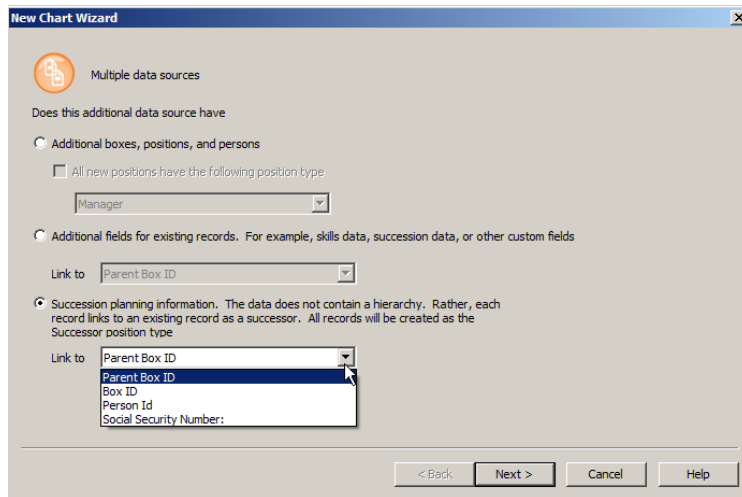
11. If the Style wizard was not selected, you will need to define and assign the custom fields. This topic is covered in the Custom Fields manual and is also available in the User Guide. Select Data, then Custom fields to display the fields in the chart box.

The Asset data is displayed in the chart box.



### 2.3 Adding Successor Records

Many times Successor data is stored in another database. These records can be added by selecting the third option for Multiple Data Sources.

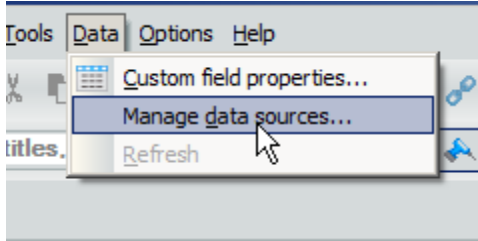


In the Successor Data feed, a field of data must associate to a field of data in the existing chart. This tells OrgPublisher where the added record should display as a successor.

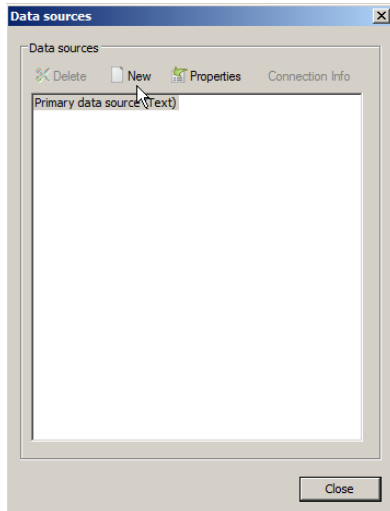
### 2.4 Adding Additional Data Sources to an Existing (.odbx) Chart

After creating a chart with the New Chart Wizard you may decide to add additional fields of data for existing records at a later time. You could also add records from another source (contractors, temps) or include succession records. This can be done from the Data menu.

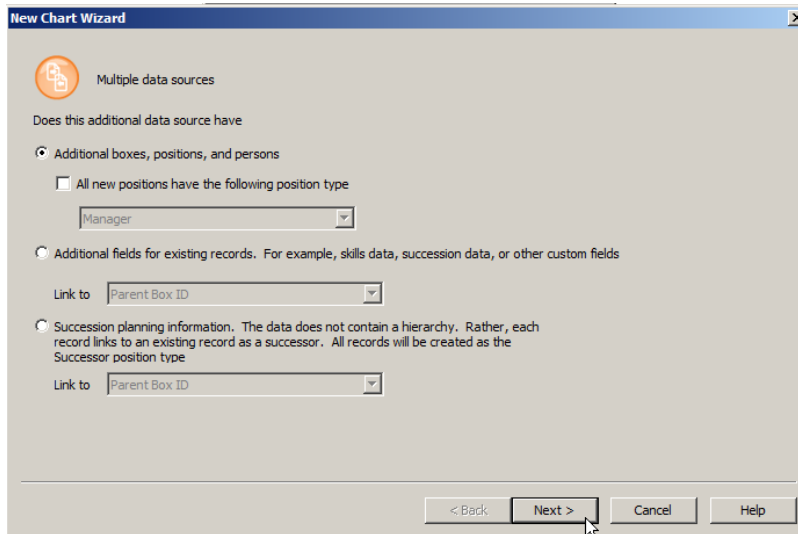
1. Select Data, then Manage data sources.



2. Select New.



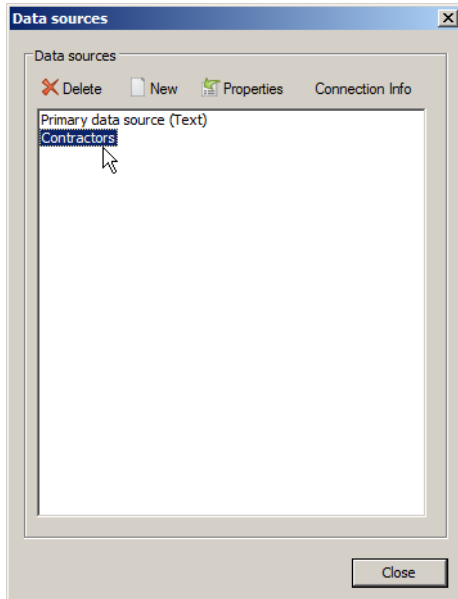
3. Select the type of data to add.



4. Please refer to the previous sections for adding Additional records, Additional fields, or Succession records to complete this step.

- The new data source is added. Click Close to return to the chart with the new data added.

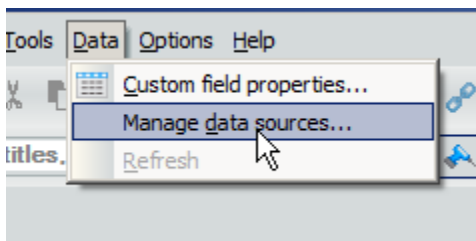
**Please note:** If additional fields were added to existing records, you will need to define and assign the fields to display in the chart. This topic is covered in the Custom Fields manual and is also available in the User Guide. If Succession records or records such as Contractor or Temp were added, you may want to format the boxes for these Position Types to highlight the addition.



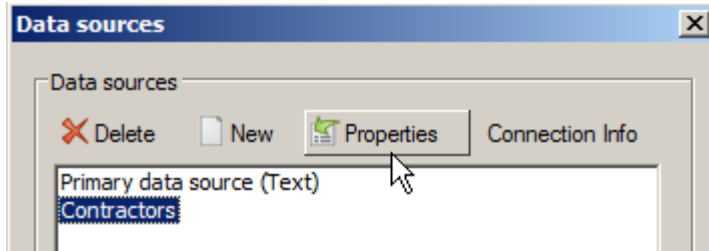
## 2.5 Modifying Data Sources

Data sources can be modified to include new fields of data.

- Select Data, then Manage data sources.



- Select the data source to be modified, and then select Properties.

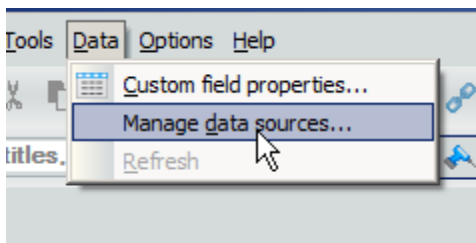


3. The New Chart wizard will begin at the sample field data display. Click Next to modify mappings. Click Finish when prompted.

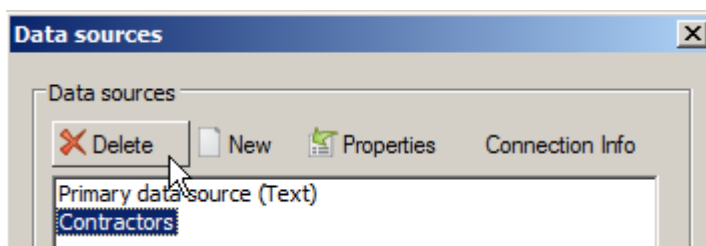
## 2.6 Deleting Additional Data Sources

Data sources that are no longer needed can be deleted from the Data menu. The Primary data source cannot be deleted.

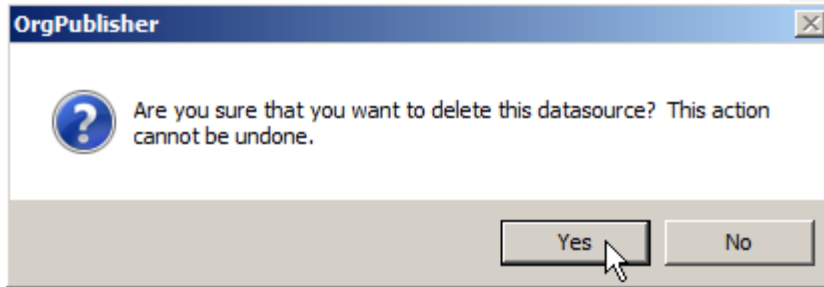
1. Select Data, then Manage data sources.



2. Select the data source to be deleted, and then select Delete.



3. Select OK to confirm the deletion.



4. The data source no longer displays in the list. Click Close to return to the chart. Data from the deleted data source is no longer available in the chart.

