

# OrgPublisher Custom Fields



## **OrgPublisher 10 Training**

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## 1 Custom Fields

Prior to creating a data extraction, it is recommended that you identify the audiences (charts that you require) and the data needed for each chart and audience. OrgPublisher can read an unlimited number of fields from your data source. Custom Fields are all customer specific fields.

Field Number	Field Name	Description
20+	Custom Fields	Fields 20 and up allow you to bring in data of your choosing to be displayed in your organization chart. For example, the custom field of Phone Ext. might be field 20.
50 – 64	Succession Custom Fields	If a chart is created as a Succession chart or succession data is added to a chart, these fields are used to store the common succession data.

Why use Custom Fields?

- Additional fields provide more information for analysis
- Provide additional sensitive data to people who need to view it
- Assists with data validation

Data Suggestions

- Skill sets
- Team Membership
- Anticipated retirement date
- Birth date
- Next appraisal due date
- Last appraisal rating
- Succession ranking
- Next anticipated position
- Completed training
- Accrued vacation
- Virtually anything you need

## 2 Defining and Assigning Custom Fields

Custom Fields that are brought into a chart need to be **defined** and **assigned**.

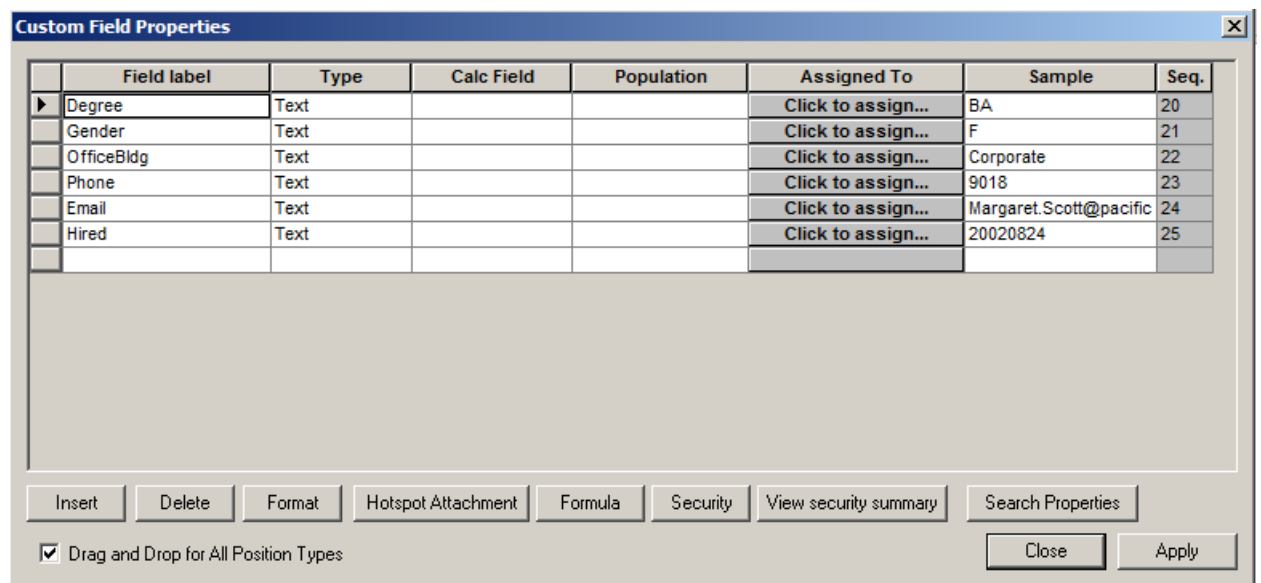
**Defining** a Custom field includes:

- Creating a label name
- Identifying the type of data within the field
- For summary fields (Read the *Summary Fields* manual for more information), determine the following:
  - What field is used in the calculation?
  - What part of the organization should be included in the summary?
  - What formatting is applied to the result?
- Setting Custom Field Security
- Setup of Hotspot attachments (Read the *Hotspots and Smart Links* manual for more information)
- Defining Search Properties
- Inputting Formulas (OrgPublisher Premier only – Read the *Formulas* manual for more information)

**Assigning** a Custom field determines what Position Types can display this field in the chart box.

This only has to be done once. Then, it becomes part of the template file (.otm) associated with the data feed.

1. Click on **Data** and then **Custom Field Properties** in the menu bar.



2. Define the data.
3. **Field Label** is a descriptor of the data in the field.

## 4. Types

- 4.1 **Text** – alpha numeric data
- 4.2 **Hotspot** – label for Email, URL, API, document, etc.
- 4.3 **Numeric** – can be summarized
- 4.4 **Currency** – monetary values that can be summarized
- 4.5 Mathematical functions **Count, Sum, Average, Min, Max, Percentage** for summary fields
- 4.6 **Date** – data should be sent to OrgPublisher as yyyyymmdd
- 4.7 **Email** – makes the field a hotlink, launches the email client and loads the email address
- 4.8 **Position ID** – used with OrgPlan, OrgHistory, Comparing 2 Charts feature
- 4.9 **Direct Count** (OrgPublisher Premier Only) – This is a summary field. Totals the direct reports for a parent box.
- 4.10 **Level Number** (OrgPublisher Premier Only) - This is a summary field. Identifies the relative level of the box from the top box fed into OrgPublisher.
- 4.11 **Levels Below** (OrgPublisher Premier Only) - This is a summary field. Counts the number of levels below the current box.

Field label	Type
Degree	Text
Gender	Text
OfficeBldg	Hotspot
Phone	Numeric
Email	Currency
Hired	Count
	Sum
	Average
	Minimum
	Maximum
	Percentage
	Date
	Email
	Position ID
	Direct Count
	Level Number
	Levels Below

- 5. **Calc Field** - Select a field with the type of numeric or currency for summarization  
**Population** – What Position types or Groups are to be included in the calculation  
 (Read the *Search and Group* manual for more information)

**Please Note:** Calc Field and Population are used when creating Summary Fields. This is detailed in the Summary Field creation document.

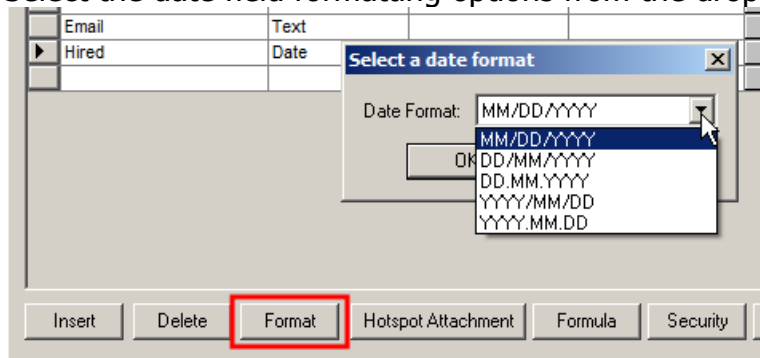
- 6. **Assigned To** – Identify the chart box section (Box Title, Job Title or Person) and the Position Type(s) where this field of data will be available
- 7. **Sample** – Custom Fields displayed for the first data record fed into OrgPublisher

## 2.1 Formatting Numeric, Currency, Summary and Date Fields

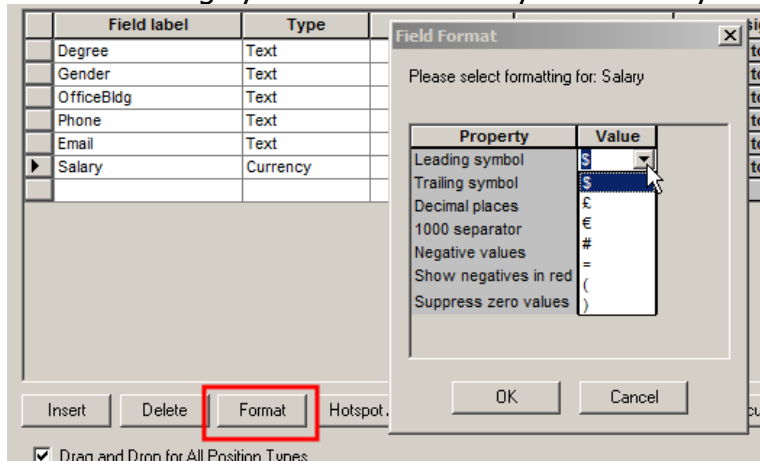
OrgPublisher provides formatting options for Summary and Date fields. If the field is a currency field, you can also set the leading symbol for the field.

1. Select **Data**, then **Custom Field Properties**
2. Select a **Currency, Summary or Date** field
3. Select the **Format** button

3.1 Select the date field formatting options from the drop down menu.



3.2 Set the leading symbol for a currency or summary field.



4. Click **OK**

### 3 Modifying Data Feed and Field Sequence

Whether you have used a .csv file that followed the standard OrgPublisher file layout OR you mapped the fields using the New Chart Wizard, the Custom fields are defined to be in a specific sequence. In the example below, the Phone number is in position 20. If the data in the chart was opened in Microsoft Excel, the phone data would be in Column T – the 20<sup>th</sup> column.

Field label	Type	Calc Field	Population	Assigned To	Sample	Seq.
Phone	Text			All Position Types	8017	20
Email	Email			All Position Types	Samantha.Hamilton@pa	21
State	Text			All Position Types	CA	22
Bldg	Text			All Position Types	Corporate	23
Office No.	Text			All Position Types	C83	24
CPR	Text			All Position Types	N	25
Telecommuting	Text			All Position Types	Y	26
Email Contact	Hotspot			Open Position	Finance@pacificaster	27
Job Description	Hotspot			Open Position	Collections Agent.htm	28
Userid	Text			All Position Types	HamiltonS	29
Time Zone	Text			All Position Types	PST	30
Application	Hotspot			Open Position	Job Application.htm	31
PositionID	Text			All Position Types	132	32
Password	Text			All Position Types	123	33

Buttons: Insert, Delete, Format, Hotspot Attachment, Formula, Security, View security summary, Search Properties, Close, Apply

Drag and Drop for All Position Types

#### 3.1 Why Does this Matter?

If the data extraction producing the .csv changes OR the data source used for mapping changes, it would have a significant impact on the chart. For instance, let's say you no longer need the phone number in the data feed AND you removed it from your data extraction query.

The email data would now be in position 20/Column T.

The State data would be in position 21/Column U.

However, your custom field labels would say that the Email address is the Phone number. Your State data would say it is an Email address AND it would be "hot" meaning someone could click on it, launch the email client and send an email to someone's state data.

#### 3.2 How do I handle modifying the data feed?

Here are some tips to follow:

1. If you **remove a field (i.e. Phone) from your data feed**, then before you open the updated .csv file OR the .odbx with the modified query, delete the Phone field from your chart. This is detailed in the next section.

- If you **add a field to your data feed**, ALWAYS add it to the end of the query pulling the data.

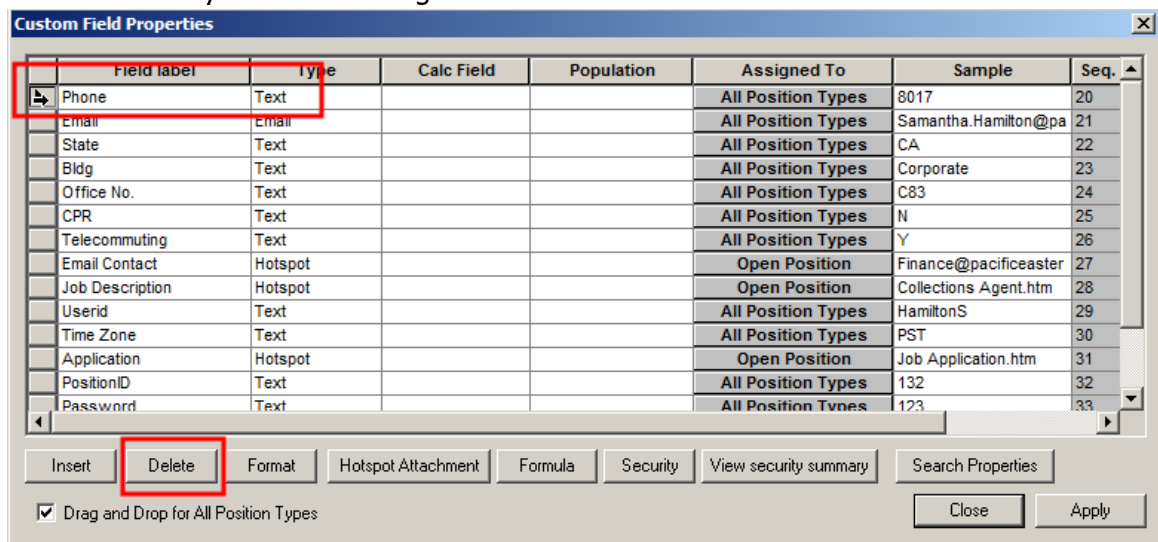
**PLEASE NOTE: Summary, Layer/Level or Formula Fields are generated in OrgPublisher and not part of the data feed. They do take up a position/sequence number/column in the chart data. If you have Summary fields, Layer/Level or Formula fields you will need to Add a placeholder in your template for the new field.** This is detailed in the next section.

- It is **never** a good idea to re-order the data feed for an existing chart.

### 3.3 Deleting a Custom Field

Before opening the data feed where you have removed a Custom Field, you should open the current data feed to update the Defined Custom Fields.

- Open the current chart.
- Click on Data, then Custom Field Properties.
- Select the field you are removing and then click Delete.



- You will be prompted to confirm the deletion. Click Yes.

- The Email field data is now in Sequence 20.

Field label	Type	Calc Field	Population	Assigned To	Sample	Seq.
Email	Email			All Position Types	Samantha.Hamilton@pa	20
State	Text			All Position Types	CA	21
Bldg	Text			All Position Types	Corporate	22
Office No.	Text			All Position Types	C83	23
CPR	Text			All Position Types	N	24
Telecommuting	Text			All Position Types	Y	25
Email Contact	Hotspot			Open Position	Finance@pacificeaster	26
Job Description	Hotspot			Open Position	Collections Agent.htm	27
Userid	Text			All Position Types	HamiltonS	28
Time Zone	Text			All Position Types	PST	29
Application	Hotspot			Open Position	Job Application.htm	30
PositionID	Text			All Position Types	132	31
Password	Text			All Position Types	123	32
Open Since	Date			Open Position	20081215	33

- Close the Custom Field Properties and Save and Close the chart.
- Pull your updated data extraction.
- The field will be removed and all data and label definitions are now moved up 1 row.

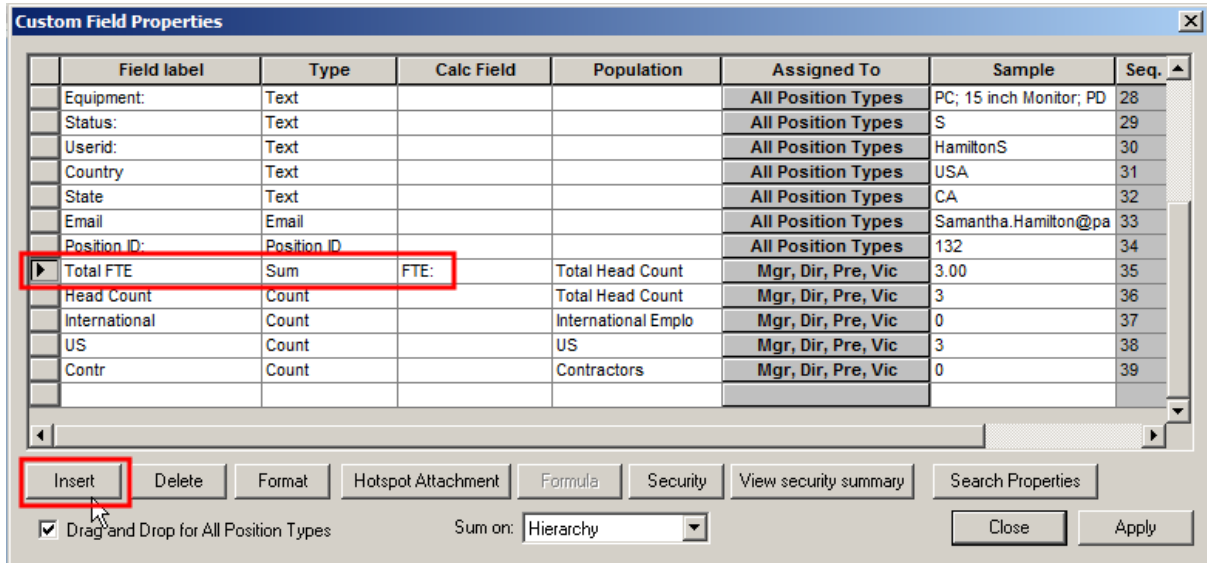
### 3.4 Inserting a Placeholder for a New Custom Fields

Before opening the data feed where you have added a Custom Field, you should open the current data feed to update the Defined Custom Fields.

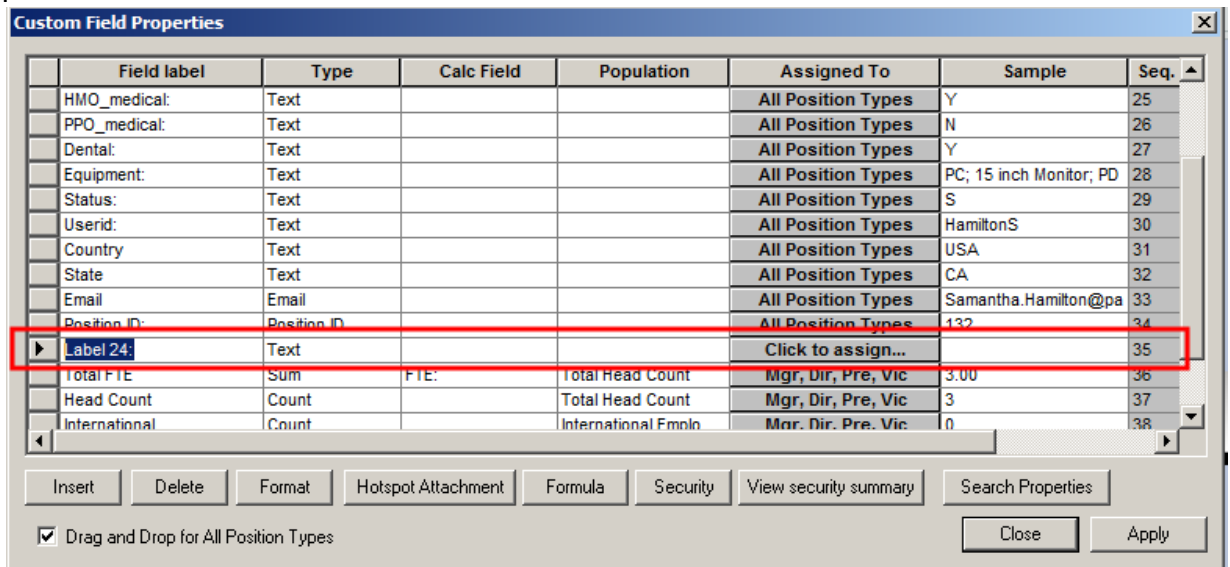
- Open the current chart.
- Click on Data, then Custom Field Properties.
- Locate the first Summary, Layers and Levels or Formula field defined. In the example below, Sequence 35 is a Sum field. It is the first Summary Field.

Field label	Type	Calc Field	Population	Assigned To	Sample	Seq.
Equipment:	Text			All Position Types	PC; 15 inch Monitor; PD	28
Status:	Text			All Position Types	S	29
Userid:	Text			All Position Types	HamiltonS	30
Country	Text			All Position Types	USA	31
State	Text			All Position Types	CA	32
Email	Email			All Position Types	Samantha.Hamilton@pa	33
Position ID:	Position ID			All Position Types	132	34
Total FTE	Sum	FTE:	Total Head Count	Mgr, Dir, Pre, Vic	3.00	35
Head Count	Count		Total Head Count	Mgr, Dir, Pre, Vic	3	36
International	Count		International Empl	Mgr, Dir, Pre, Vic	0	37
US	Count		US	Mgr, Dir, Pre, Vic	3	38
Contr	Count		Contractors	Mgr, Dir, Pre, Vic	0	39

- Select the first Summary, Layers and Levels, or Formula field defined and click Insert.



- You will be prompted to confirm the insert. Click Yes.
- The inserted field is now Sequence 35. Highlight the label and type over with your preferred name.

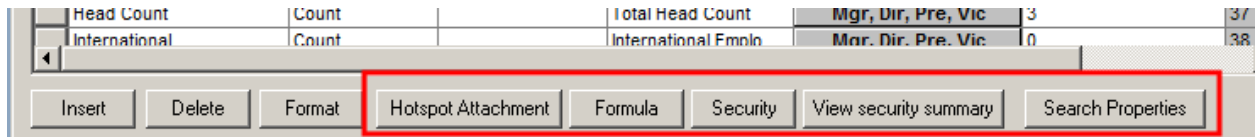


- Close the Custom Field Properties, Save, and Close the chart.
- Pull your updated data extraction.
- Your new field will be in Position 35. Define and Assign.

## 4 Hotspot Attachment, Formula, Security, View security summary and Search Properties

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The remaining buttons (outlined in red below) will be discussed in detail within the specific topic manuals. A short description is provided below.



- Hotspot Attachment – Link setup to go to other web pages, open another program or document
- Formula – OrgPublisher Premier Only – Use VB script to alter data or perform more advanced calculations on numeric or custom fields
- Security – Set access to viewers of the published chart
- Search Properties – Synonym file for result display in searches – i.e Vice President, VP, V.P., Vice Pres