

OrgPublisher EChart Security

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OrgPublisher 10 Training

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1 EChart Security Overview

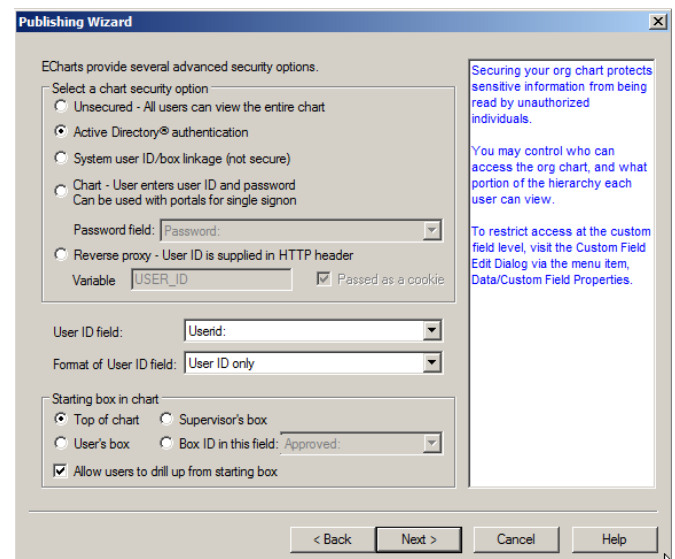
Publishing charts as EChart Rich or Thin client allows securing charts on several levels.

- Validate if a user has access to the chart.
- Determine where the user should open the chart.
- Determine if the user should be allowed to navigate up and over in the chart from their original opening position.
- Determine if a user can view a Style.
- Determine if a user can see a field of data.
- Determine if a user can create an Organizational Planning chart.
- Determine what functionality a viewer has in a published chart.

1.1 EChart (Rich & Thin Client) Authentication

OrgPublisher provides several methods for authenticating a user. This is an option offered in the publishing wizard when EChart publishing is selected.

- Unsecured
 - No authentication
- Active Directory® authentication
 - The server automatically recognizes you by your network login and password.
- System User ID/box Linkage
 - The server recognizes you by your local user account information
- Chart authentication
 - The server prompts each user to enter a user ID and password.
 - Identify the field in the chart that contains the password.
- Reverse proxy
 - Allows OrgPublisher to retrieve the user ID from the HTTP header variable and use it for authentication.
- User ID Field
 - Identify the field in the chart that contains the userid.
- Format of User ID field
 - Identify the format of the userid.
- Starting box in Chart
 - Provides control for where the user will open the chart.
- Allow users to drill up from starting box
 - Leave unchecked to prevent users from drilling to other areas of the chart.



The screenshot shows the 'Publishing Wizard' dialog box with the following settings:

- Select a chart security option:**
 - Unsecured - All users can view the entire chart
 - Active Directory® authentication
 - System user ID/box linkage (not secure)
 - Chart - User enters user ID and password
Can be used with portals for single signon
- Password field:** Password: (dropdown menu)
- Reverse proxy - User ID is supplied in HTTP header:**
 - Variable: USER_ID
 - Passed as a cookie
- User ID field:** Userid: (dropdown menu)
- Format of User ID field:** User ID only (dropdown menu)
- Starting box in chart:**
 - Top of chart
 - Supervisor's box
 - User's box
 - Box ID in this field: Approved: (dropdown menu)
- Allow users to drill up from starting box

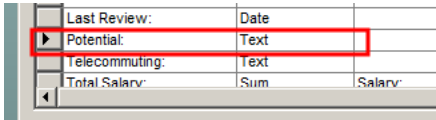
Buttons at the bottom: < Back, Next >, Cancel, Help.

Right-hand text box: Securing your org chart protects sensitive information from being read by unauthorized individuals. You may control who can access the org chart, and what portion of the hierarchy each user can view. To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.

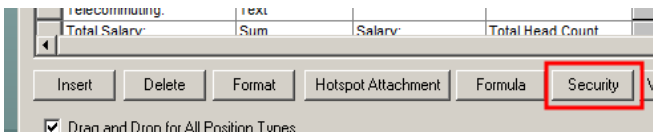
1.2 Field Security

OrgPublisher has security that controls who can see a field of data and for what group of people a field of data will display.

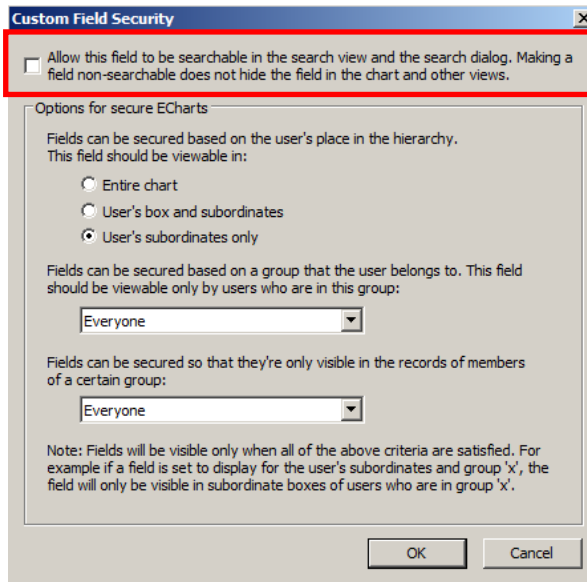
1. Select Data, then Custom Field properties.
2. Select the field to secure.



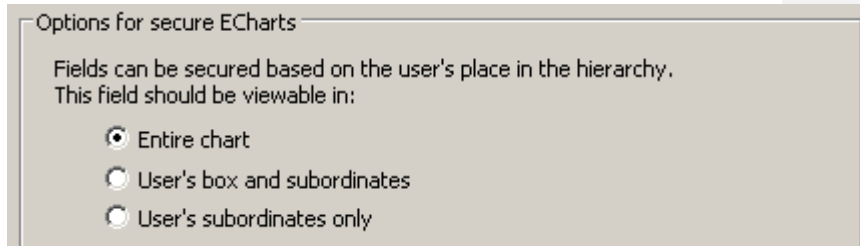
3. Click on the Security button.



4. In the Custom Field Security window, indicate with a check mark if this field can be searched.

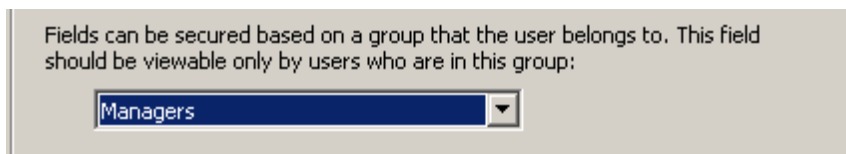


5. Secure the custom field of data based on the individual's location in the chart hierarchy.



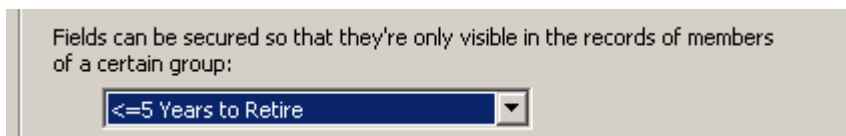
- **Entire chart** – This allows a viewer to see this information for the Entire chart. At publishing time, the chart administrator can set the chart to open at the top of the chart, the user's box, their supervisor's box or to a specific box. If the chart administrator also indicates that the user cannot drill above the starting box, then "Entire Chart" for this user starts at the opening box.
 - **User's box and subordinates** – The user can see the data for themselves and any box in their span of control.
 - **User's subordinates only** – The user cannot see their own data, but they can see the data in any box within their span of control.
6. By default, everyone who has a box in the chart can view this field (even though it is hierarchically limited by the settings in the previous step). This can be restricted further by creating a Group (refer to Search and Group manual) and identifying the individuals who have authorization to see the custom field data.

Example: If I am a member of the Managers Group, I can see this field for the employee boxes in the Entire chart, my own box and my subordinates or (based on the selection in Step 5) just for my subordinates.



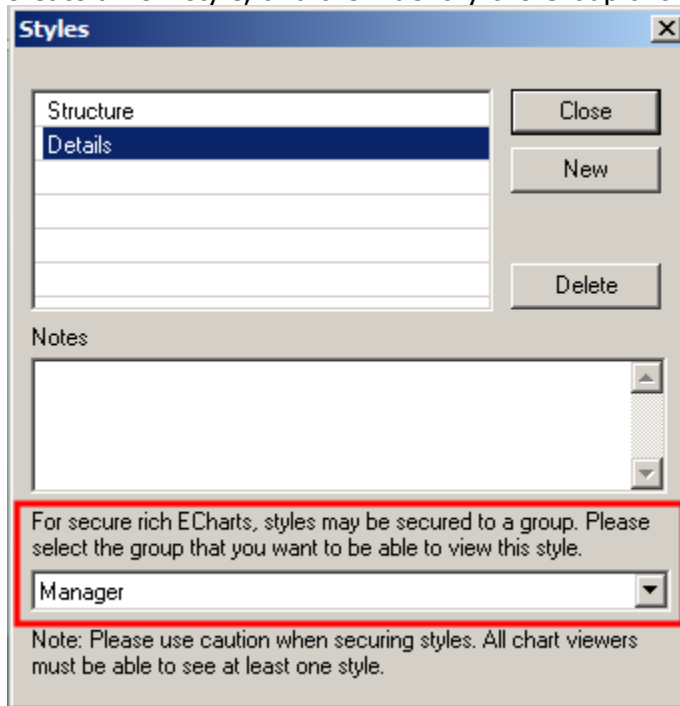
7. Data can also be restricted to only display for employees who are members of a Group.

Example: The selected field will only be displayed in the boxes of members of the <=5 Years to Retire Group.



1.3 Style Security (EChart Rich Client only)

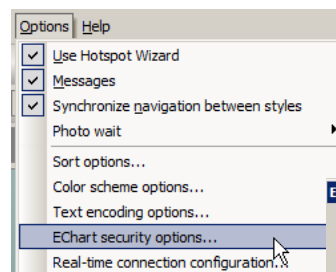
1. Create a Group, identifying who can see a particular style.
2. Create a style containing all the information needed by the Group.
3. Select File, then Styles.
4. Create a new style, and then identify the Group allowed to view the style.



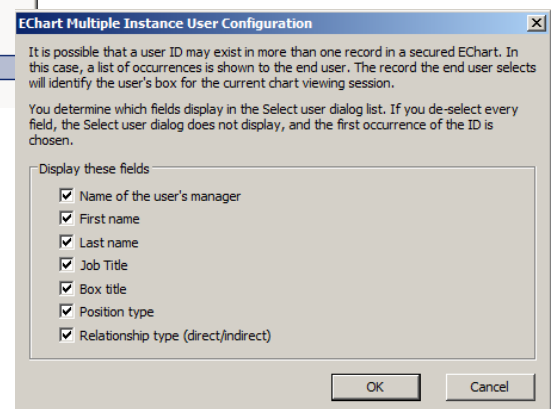
1.4 EChart Access for Multiple Reports

If a person appears in the chart more than once (multiple reports, for instance), they will be prompted to select which of their "own" boxes they want to open when entering the chart. The chart administrator sets what identifying fields display for the published chart viewer who appears more than once in the chart.

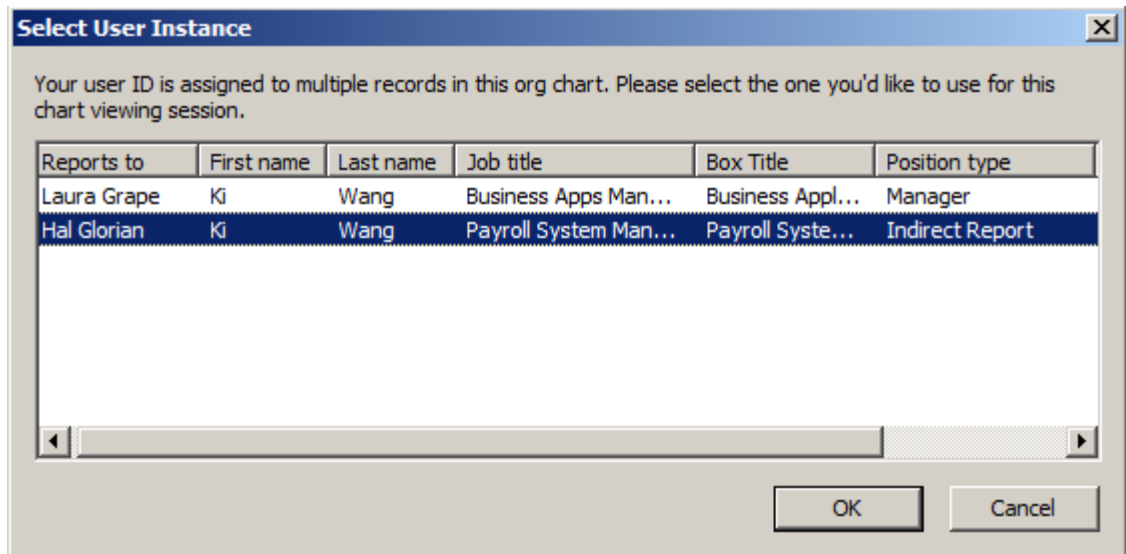
- Select **Options**, then **EChart Security Options**.



- Select the fields to display for the user who has a multiple reporting relationship.



- I am logging in as Ki Wang (she has a direct and indirect relationship).
- I select where I want to open the chart and then select OK.



1.5 Organizational and Succession Planning Access – OrgPublisher Premier

At publishing time, the chart administrator determines if Organizational Planning and/or Succession Planning will be offered in the published chart. The default settings allow everyone to create these charts from all records in which they have access within the chart.

The option to create either of these charts can be restricted based on Group membership. The chart administrator can create two Groups to control access:

- A Group where members can create an Organizational or Succession Planning chart from their box or below in the published chart.
- A Group where members can create an Organizational or Succession Planning chart with any or all records published.

Please refer to the Publishing manual for information on invoking the Organizational and Succession Planning Chart functionality in a published chart.

1.6 Toolbar Button Access in a Published Chart

Published chart toolbar buttons can be restricted to use by members of specific groups. Please review the section on Toolbar Button security in the Publishing manual for detailed instructions.