

OrgPublisher File Layout

OrgPublisher 10 Training

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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.
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>

Field Number	Excel Column	Required	Field Name	Description
10	J	NO	Job Title	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.
11	K	NO	Reserved	Please do not populate this field.
12	L	NO	Box Sequence Number	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.
13	M	NO	Job Sequence Number	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.
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.

Field Number	Excel Column	Required	Field Name	Description
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.

Succession Planning Charts

There are 15 fields that are available for mapping when you select to create a Succession Planning chart.

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	

Field Number	Excel Column	Required	Field Name	Description
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	