

OrgPublisher Overview and Basics

Version: 1.0
January 20, 2009



OrgPublisher 9 Training
Copyright 2002 – 2009 All Rights Reserved by Aquire

OrgPublisher™, OrgPublisher Premier™, Unifi™, Mobile OrgPublisher™, and Pocket OrgPublisher™ are trademarks of Aquire in the United States and other countries.

Microsoft®, Windows®, Internet Explorer, Pocket PC 2002 platform, and ActiveSync®, are either registered trademarks or trademarks of Microsoft Corporation in the United States and other countries. Netscape® and the Netscape N and Ship's Wheel logos are registered trademarks of Netscape Communications Corporation in the United States and other countries.

Blackberry™, RIM850™, RIM857™, RIM950™, and RIM957™ are either registered trademarks or trademarks of Research in Motion Limited (RIM) in Canada and other countries.

Palm™, Palm OS®, and HotSync® are either registered trademarks or trademarks of Palm, Inc. in the United States and other countries.

JAWS® for Windows is a registered trademark of Freedom Scientific in the United States and other countries.

SAP® and mySAP™ are trademarks or registered trademarks of SAP AG in Germany and in several other countries all over the world.

Table of Contents

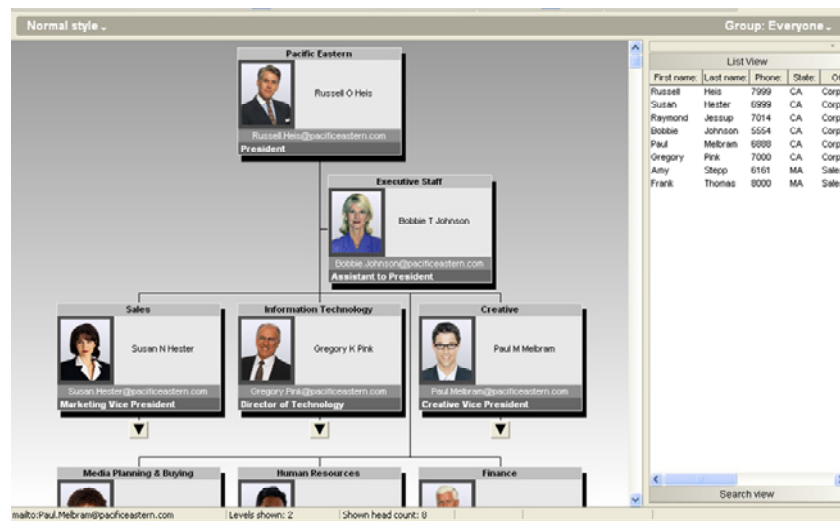
1	OrgPublisher Introduction	2
1.1	General Viewing Chart.....	2
1.1.1	General Viewing – Directory	2
1.2	Human Resources/Management Chart.....	3
1.3	Organizational Planning/Succession Planning Chart.....	3
2	Input File Layout.....	4
3	Input File Contents/Format	9
3.1	Comma delimited text data (quotation marks (“”) are text qualifiers)	9
3.2	Database Table, View, or Query.....	9
4	Hierarchical Structure	10
5	OrgPublisher File Types	11
6	View Mode vs. Build Mode	12

1 OrgPublisher Introduction

OrgPublisher builds organization charts from any data source. You can build your chart from either a single data source, or you can use multiple sources. Once the data is in OrgPublisher the chart administrator can format it to display, analyze, and report on all aspects of the available data. Once formatting is complete, the administrator sets up publishing for distribution of the chart to the intended audience.

Many 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.

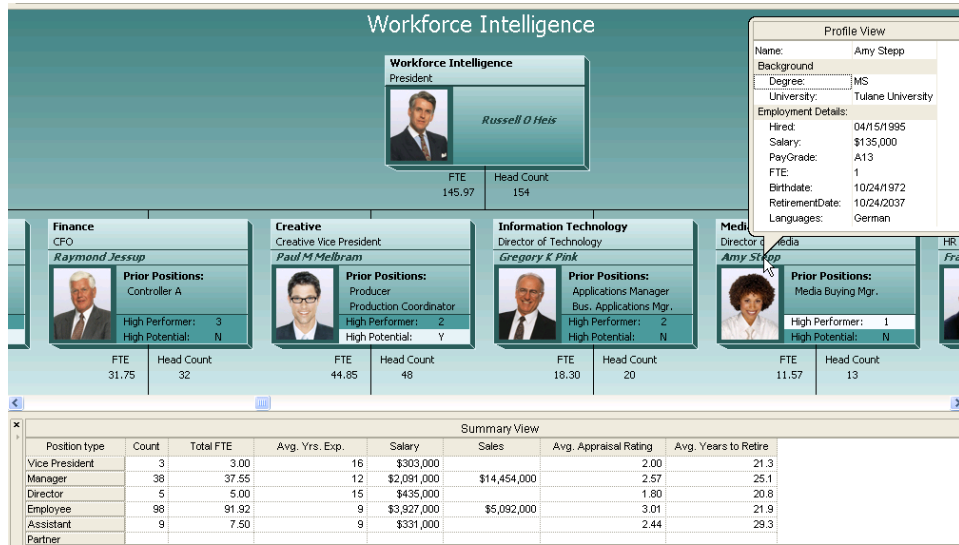
1.1 General Viewing Chart



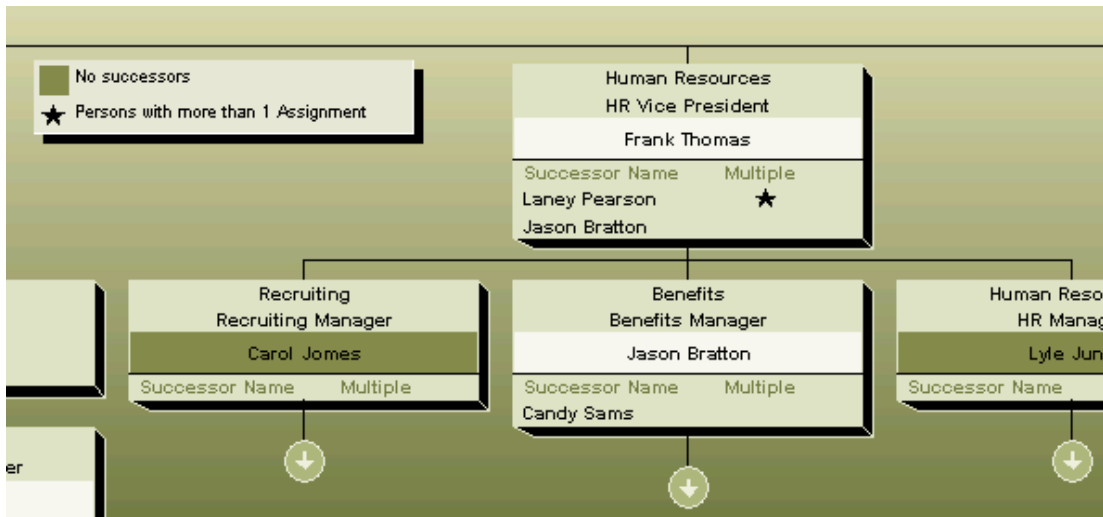
1.1.1 General Viewing – Directory

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	Mennt	April	Product Sp...	National	T/L3 7799	april.mennt...	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

1.2 Human Resources/Management Chart



1.3 Organizational Planning/Succession Planning Chart



2 Input File Layout

OrgPublisher stores your data feed in a comma-separated file as you are formatting and preparing your charts for publishing. Once the charts are published, the formatting and data are “merged” together in the published chart file. OrgPublisher stores the formatting in a template file which preserves the location of fields of data, what their labels are, any styles that were created, etc.

OrgPublisher 8 does not require that you “feed” OrgPublisher in a prescribed format. The New Chart Wizard guides you through connecting to the data source and then mapping the fields where OrgPublisher can find and use them for formatting.

If you were to look at the data in a product such as Microsoft Excel, the fields would be laid out in the order described below. The Excel Column label is provided as a reference.

OrgPublisher requires certain fields in order to build the chart structure. These are noted and you will need to supply data that corresponds to accurately build a chart structure. The additional fields give you and your charts viewer more flexibility to obtain information that meets your business needs.

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>).</p> <p>OrgPublisher's built-in record types are:</p> <ul style="list-style-type: none"> 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.)
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 create 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	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.

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 leave this field blank.
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.
16-17	P, Q	NO	Reserved	Please leave these fields blank.

Field Number	Excel Column	Required	Field Name	Description
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 leave field blank.
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 or add succession planning data

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	

Field Number	Excel Column	Required	Field Name	Description
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	

3 Input File Contents/Format

3.1 Comma delimited text data (quotation marks (“”)) are text qualifiers)

```
"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"
"5","14","Sales","E","8","Hamilton","Jane","Sales Assistant",,,,,,,,,,"108"
"1","9","Support Staff","<SF>","9","Johnson","Sue","Executive Assistant - HR",,,,,,,,,,"109"
"5","12","Sales","E","10","Hastings","Sally","Sales Support",,,,,,,,,,"110"
"5","13","Sales","E","11","Wagner","Martha","Sales Person",,,,,,,,,,"111"
"2","10","Accounting","E","12","Williams","Penny","Accountant",,,,,,,,,,"112"
```

3.2 Database Table, View, or Query

Parent_Box_ID	BoxID	BoxTitle	RecordType	ID	LastName	FirstName	Mi	JobID	JobTitle
	1	Management	<CEO>	1	Austin	Mathew		Chief Executive Officer	Chief Executive Officer
1	3	Information Systems	D	2	Gibson	Mike		IT Manager	IT Manager
3	4	Operations	E	3	Dallas	Mark		Operations	Operations
1	2	Finance	<VP>	4	Franklin	Luke		VP - Finance	VP - Finance
1	5	Sales	M	5	Smith	Mary		Sales Manager	Sales Manager
5	6	Sales	E	6	Jones	Sam		Sales Person	Sales Person

4 Hierarchical Structure

OrgPublisher requires the Parent Box ID and the Box ID fields to be populated in order to build the hierarchy. These fields could be stored in your systems as the following:



9 Minutes

Parent Box ID	Box ID
Supervisory Position ID	Position ID
Supervisor Employee ID	Employee ID
Cost Center Reports to ID	Cost Center

The first record with a Box ID of 1 reports to no one. This is the top of the chart.

Parent_Box_ID	BoxID	BoxTitle	RecordType	ID	LastName	FirstName	Mi	JobID	JobTitle
	1	Management	<CEO>	1	Austin	Mathew		Chief Executive Officer	Chief Executive Officer
1	3	Information Systems	D	2	Gibson	Mike		IT Manager	IT Manager

The second record with a Box ID of 3 reports to 1. This record reports to the first record.

Parent_Box_ID	BoxID	BoxTitle	RecordType	ID	LastName	FirstName	Mi	JobID	JobTitle
	1	Management	<CEO>	1	Austin	Mathew		Chief Executive Officer	Chief Executive Officer
1	3	Information Systems	D	2	Gibson	Mike		IT Manager	IT Manager

Follow this logic down through the hierarchy using the data presented on the previous slide, matching Parent Box IDs to Box IDs

5 OrgPublisher File Types

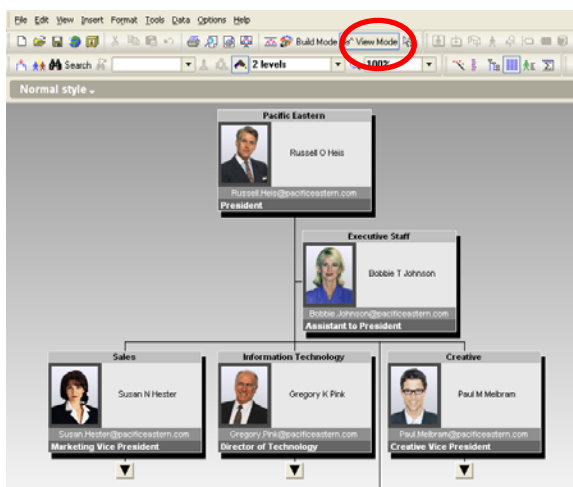
OrgPublisher produces several file types when charts are created and published. They are:

File Type	Description
ODB	Database connection file created prior to Version 8
ODBX	Database connection file created with Version 8
OCB	Chart data; comma delimited data file
OTM	<p>Template formatting file Contains box shape, color, text formatting, chart layout, custom field assignments, styles, Group criteria, 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

6 View Mode vs. Build Mode

- 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

The screenshot shows the OrgPublisher interface in Build Mode. The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Options, and Help. The toolbar contains various icons, and the 'Build Mode' button is circled in red. The main content area displays a detailed view of a person's data for 'Pacific Eastern' (Russell O Heis):

Headcount:	158
Planned Headcount:	167
Phone:	7999
CPR:	N
State:	CA
Email:	
Office/Obj:	Corporate
OfficeID:	C501
Telecommuting:	
Time_Zone:	PST
Position ID:	33
Userid:	HeisR
Password:	123

Below this view, a partial view of the 'Executive Staff' box is visible, showing 'Assistant to President' and a photo of Bobbie T Johnson.