



OrgPublisher Before You Begin

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Introduction

OrgPublisher helps you centralize the creation of organizational charts using existing HR data. OrgPublisher enables you to build charts for different audiences for different reasons. Oftentimes, access to some chart data must be restricted for some users, while available to other users. OrgPublisher helps you control who accesses what information.

In addition, OrgPublisher allows you to schedule the publishing of charts at a frequency that answers your accurate communication needs for HR data and the company hierarchy.

Chart Administrator

If you have been designated the “chart administrator,” you can:

- Bring the data into OrgPublisher
- Format the data, charts, print output, security, etc.
- Set up the publishing definition
 - If applicable, install the OrgPublisher Web Installer for HTML5 chart viewing

Once this setup and publishing is placed on a schedule, you only maintain formatting changes and new chart requirements in the future.

Confirm Installation

As administrator, you must confirm that OrgPublisher is installed, how it was installed, and if you have access. Installation can happen in one of two ways, via web administration or the desktop client. Some features vary between the installation types.

OrgPublisher Client vs. OrgPublisher Web Administration

	OrgPublisher Client	OrgPublisher Web Administration
Installation	<ul style="list-style-type: none"> User Desktop (Uncommon) Server - Chart Administrator accesses via: <ul style="list-style-type: none"> VPN Remote Desktop Server Login 	<ul style="list-style-type: none"> Server Chart Administrator is provided a link to access License allows for 5 simultaneous connections
Primary Purpose	Centralize all charting activities to one or two users: <ul style="list-style-type: none"> Data connection to one or more data sources Formatting Publishing Scheduling One-Off chart creation 	The data connection to one or more data sources generated by IT on the Web Administration Server Access to the data source provided by a link to multiple administrators: <ul style="list-style-type: none"> To format and manually publishing the chart to multiple people Save off a copy of the data for single one-off chart creation
Chart Management	Chart Administrator has total control	Chart Administrator has restricted control
Scheduling	Chart Administrator can schedule the publishing of the chart	Chart Administrator requests the setup of the publishing schedule by IT Group responsible for the Web Administration Server
Data	Chart Administrator can access data from any source	Chart administrators can use .csv files prepared in the order specified by OrgPublisher ODB Compliant data sources
Field Mapping & Multiple Data Sources	<ul style="list-style-type: none"> Chart Administrator can create multiple charts from a single .csv data The chart administrator can map additional .csv source files into an existing chart 	<ul style="list-style-type: none"> Chart Administrator can only map needed fields and bring in secondary data sources that are ODB compliant If a secondary source is needed for the chart that is provided as a .csv file, the IT Group responsible for the Web Administration Server must set this up; this is done by logging on to the server and using the client to create the connections and mappings

OrgPublisher Before You Begin

	OrgPublisher Client	OrgPublisher Web Administration
Published Chart Location	Chart administrator controls where the charts are published	All source data files and published charts are stored automatically in specific folders established at installation
HTML5 chart viewing OrgPublisher Web Installer	Chart administrator runs the installation to enable end user HTML5 chart view	Chart administrator runs the installation to enable end user HTML5 chart view

Chart Box Components

There are three primary areas in a chart box:

- Box title
- Job title
- Person/Name

The components of the chart and chart box are illustrated in the figure below.

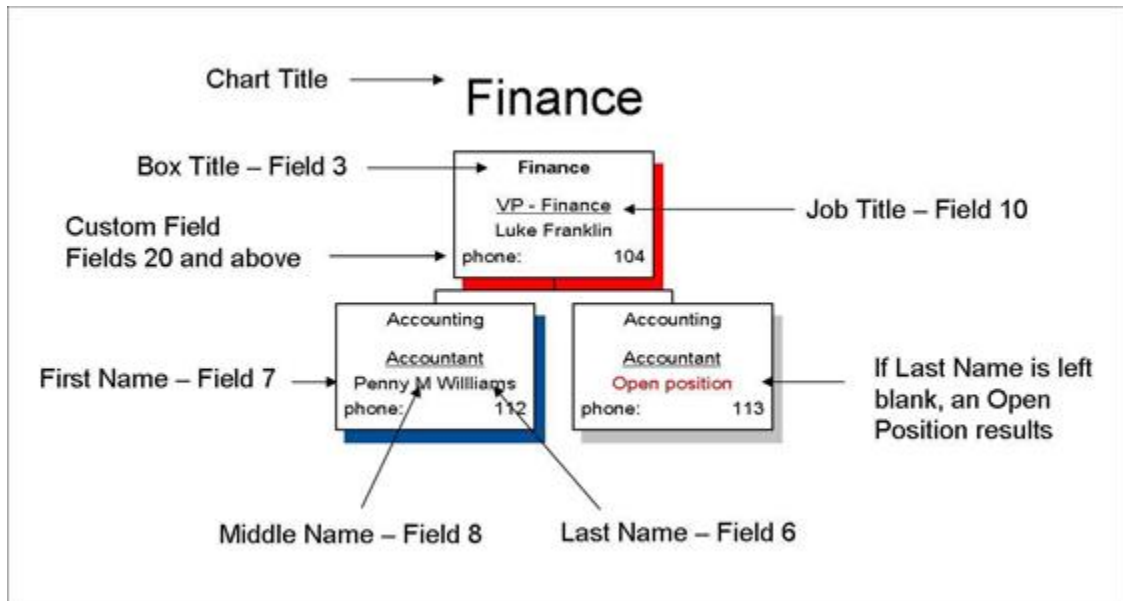


Figure 1.

Basic Data for Charts

OrgPublisher creates charts with your existing HR data. A chart/hierarchy can be created with as little as two fields of data:

- The Manager’s Employee ID or Supervisor Position ID
- The Employee’s ID or the employee Position ID

Although the chart lacks some data you may be accustomed to seeing, it is a hierarchical representation of the organization. In the following example, the Supervisor Position ID and the Employee Position ID are used to create the hierarchy. The Employee name is also passed in with the data so the chart box is not empty.

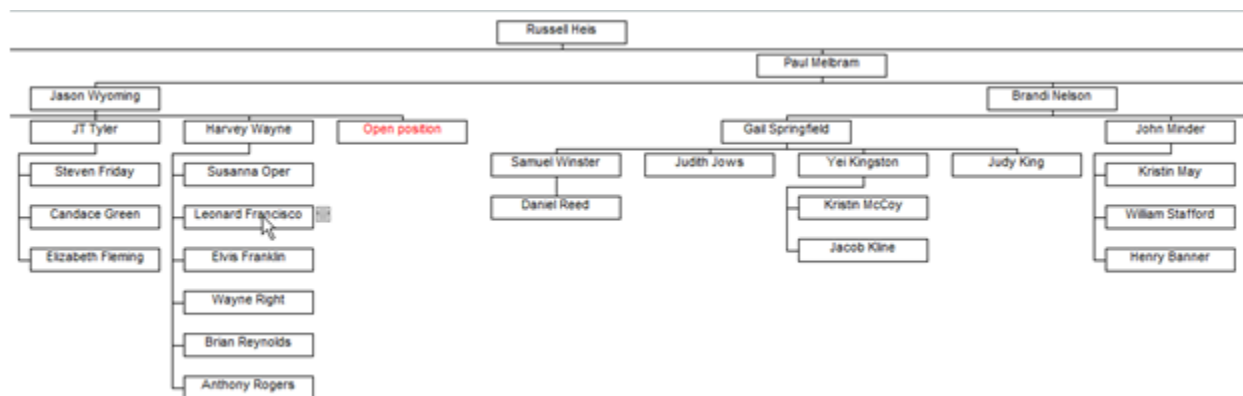


Figure 2.

Basic Position-to-Position Chart

The file used to create this chart in OrgPublisher is a .csv file. It looks like the file sample shown below when opened in Notepad. This file is a position-to-position hierarchy.

- The number 10 in the first record is the supervisor’s Position ID
- The number 408 in the first record is the employee’s Position ID
- The person holding the 408 position ID is Rita Hayes



Figure 3.

The following example is the same file that has been reordered and opened in Microsoft Excel. Headings have been added to define the columns of data.

- Parent Box ID = Supervisor’s Position ID
- Box ID = Employee’s Position ID
- Last Name = Employee’s Last Name
- First Name = Employee’s First Name

	A	B	C	D	E
1	Parent Box ID	Box ID	Last Name	First Name	
2		1	Heis	Russell	
3	1	4	Melbram	Paul	
4	4	7	Wyoming	Jason	
5	7	93	Wayne	Harvey	
6	7	98			
7	10	408	Hayes	Rita	
8	25	409	Kelly	Michael	

Figure 4.

- **No one** holds the Position #98 (Box ID). It is an open, vacant, or unassigned position. Position #98 reports to Parent Box ID #7.
- Harvey Wayne holds Position ID #7. Position ID #98 reports to Parent Box #7.
- Jason Wyoming holds Position ID #4 (Box ID). Position ID #7 reports to Parent Box ID #4.
- Paul Melbram holds Position ID #4 (Box ID). Position #4 reports to Parent Box ID #1.
- Russell Heis holds Position ID #1 (Box ID). Position #1 does not report to a position. It is the top of the chart/hierarchy.

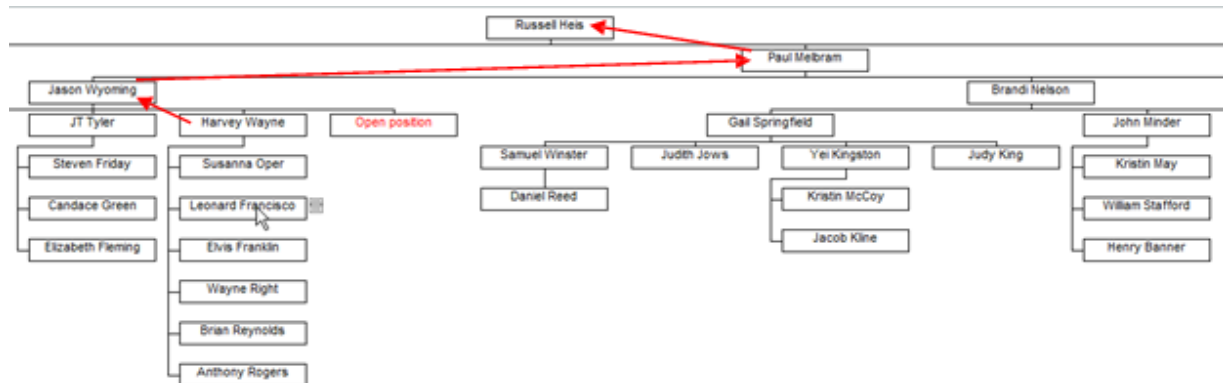


Figure 5.

Note: Open Positions and Indirect Reporting Positions may be displayed if your hierarchy is a Position-to-Position hierarchy. An Open Position is presented in the example above.

Basic Person-to-Person Chart

This is the same file presented earlier, but with a person-to=person reporting relationship.

- Parent Box ID is the Employee Number of the Manager or Supervisor
- Box ID is the Employee ID

	A	B	C	D
1	Parent Box ID	Box ID	Last Name	First Name
2		4485	Heis	Russell
3	4485	5678	Melbram	Paul
4	5678	7684	Wyoming	Jason
5	7684	1035	Wayne	Harvey

Figure 6.

Note: If Paul Melbram (Box ID #5678) leaves the organization, Jason Wyoming must be reassigned to a new manager. If he is not, then this record becomes a broken relationship, or orphan record.

Data Errors

OrgPublisher helps you clean and maintain your data. OrgPublisher identifies orphan records and other broken relationships. This is most common with "Reports-to" hierarchies. As you bring data into OrgPublisher, the relationships/hierarchy in the Parent Box ID and Box ID are evaluated. If problems exist, warning messages appear.

Activate Error Message Display

To activate the display of warning and error messages, open OrgPublisher and select **Options** from the menu. If a check mark displays in front of **Messages**, the warnings are enabled. If no check mark is shown, select **Messages** to activate the display and close the menu.

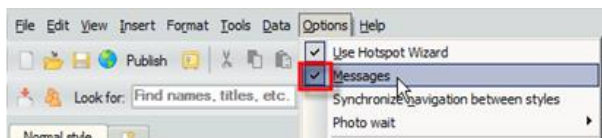


Figure 7.

Orphans

In the error dialog below, April Mennt reports to Parent Box ID (Supervisor or Manager Employee ID) #263. OrgPublisher indicates that there is no record with the Box ID #263.

In addition, Karen Smith, Box ID #26, does not have an assigned Parent Box ID. Neither does Russell Heis. One record is incorrect. OrgPublisher has selected Russell Heis as the top of the organization. Karen Smith should have her HR record updated with a new Manager ID.

The **Copy List to Clipboard** allows you to copy the error list and paste it into Microsoft Excel. Print the list, if applicable, and then make data corrections in your HR system.

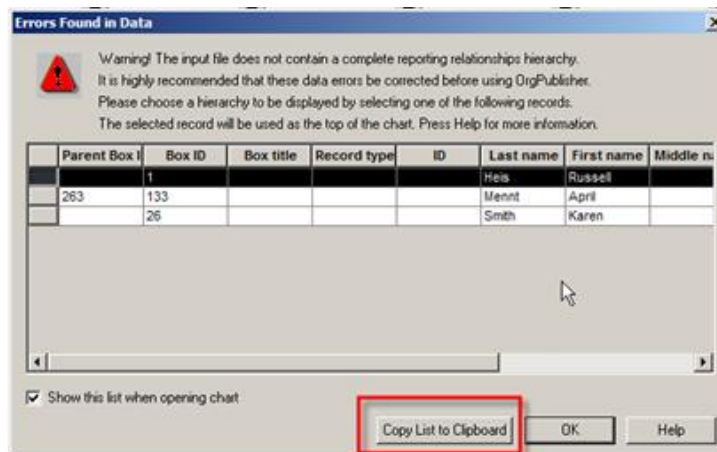


Figure 8.

Recursive Relationships

The following example shows three sets of recursive relationships.

- John Minder and Gail Springfield report to each other
- Greg Pink, Paul Melbram, and Amy Stepp report to each other
- Lou Ramos reports to himself

All of these data errors must be corrected for the chart to draw the hierarchy and function properly.

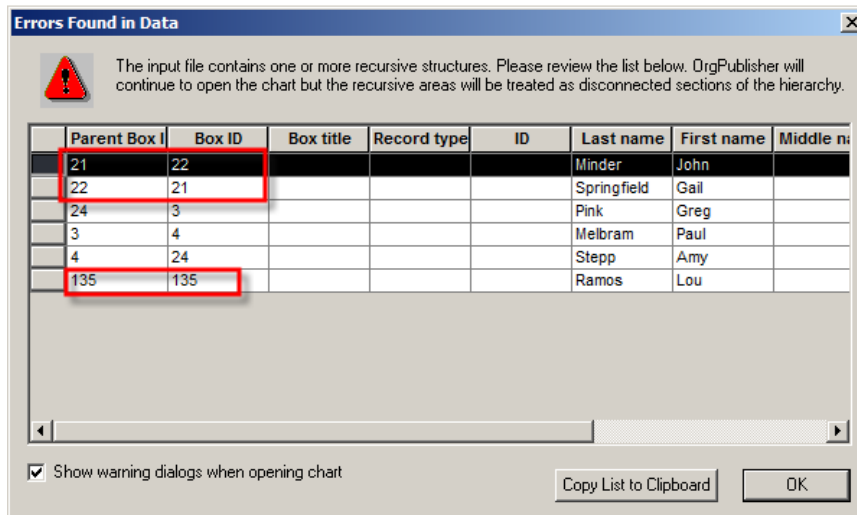


Figure 9.

Dual Reporting Relationship for a Record

This error indicates that a Box ID is used for more than one record. You are told in the error message which Parent Box ID is affected, as well as the Box ID that is duplicated.

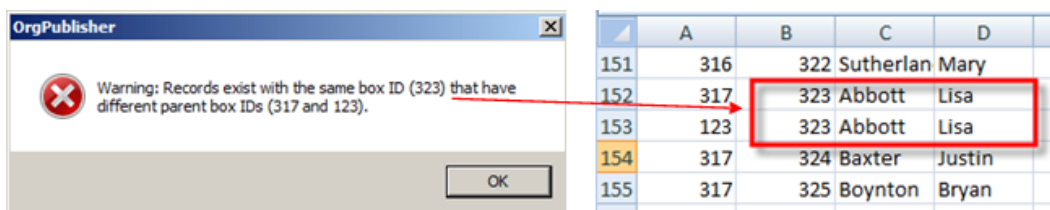


Figure 10.

Note: If this is intentional, you do not need to correct the error. But this warning will continue to appear and stop you from automatically publishing your charts. If other records are duplicated, those errors appear as you correct the preceding error.

OrgPublisher File Types

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

File Type	Description
ODB	Database connection file – does not use field mappings
ODBX	Database connection file – created with field mappings
OCB	Chart data – comma delimited data file
OTM	<p>OrgPublisher stores the formatting in a template file which preserves the location of fields of data, their labels, any styles that were created, box shapes, color, text formatting, chart layout, custom field assignments, styles, group criteria, publishing definitions, 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 select 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 – the binary chart/template file combined. Users viewing the published charts use an ActiveX component (PluginX).</p> <p>This is the default file type for charts created using standard OrgPublisher.</p>
OCS	EChart – contains information to contact the EChart server, security
OPW	Web Administration file
HTM	<p>HTML code page – main chart page that determines the browser type and invokes the JS file for downloading the ActiveX Plugin.</p> <p>Also applicable to EChart, both thin and rich client.</p>
DLL	<p>EChart chart file – contains DLL for both thin client and rich client. DLL file is named the same as the published chart file and must be in the same directory as the EChart OCP file.</p> <p>Needs to be configured in ISAPI Filter setup (IIS6) or Handler Mapping (IIS7).</p>
BAT	EChart file for both thin and rich client – batch file that can be used for automated EChart publishing. See the Publish ECharts section of this document for detailed information.

Data Sources

There are several options for getting your most current data into OrgPublisher. The most common methods, and why they are used, are listed in the following table.

CSV File in the OrgPublisher Specified Order

Primary Use	<ul style="list-style-type: none"> • OrgPublisher Web Administration and OrgPublisher Client • Data extraction created with OrgPublisher for SAP wizards • File Extension is .ocb or .csv
Advantage	<ul style="list-style-type: none"> • Does not require field mapping • Web Administration – Select the chart file from the list when Web Administration is launched • Client – Launch OrgPublisher, select File then Open, and point to the .csv or .ocb file to be used
Disadvantage	<ul style="list-style-type: none"> • Chart Administrator does not control what fields will be in the chart – whether they are displayed or not • Fields that are not displayed or used for the chart must be set as unsearchable
Reminder	<ul style="list-style-type: none"> • File must be extracted with the same field order and placed in the save folder using the same name and file extension • Overwrites the (.ocb, .csv) each time the data is extracted • Replaces the data and reuses the corresponding .otm file that contains formatting and publishing information

The following is a list of the fields and required sequence when using this method for chart generation.

Note: Although a field is not required, it must be accounted for in the data extraction. In the example below, fields that do not contain data are highlighted in pink. The first highlight indicates that there is no Parent Box ID for the first record. A comma accounts for the Parent Box ID field, then data is provided for the second field or Box ID field. The first record is the top box in the chart and does not report to anyone or another position.

```

"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"
    
```

Figure 11.

Field List Order

You can create a new chart using [Prebuilt Reports](#) that map your fields to match a report template or by mapping your data yourself and by selecting formatting options.

Field Number	Excel Column	Required	Field Name	Description
1	A	Yes	Parent Box ID	Identifies the report-to box for a selected employee. Any combination of letters or numbers can be used as the unique identifier. This field 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	Identifies a box in the chart, usually the Employee ID. This field can be duplicated for several records if there are multiple people located in a single box. This field 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	The box title that displays at the top of the box. This could be the cost center or a full department name.
4	D	No	Record Type	The type of record. If left blank, defaults to an Employee record type. Custom record types can be defined by typing any alpha numeric characters other than those already used by OrgPublisher. These characters must be surrounded by angle brackets, <> (for example, <Vice President>). OrgPublisher built-in record types include: <ul style="list-style-type: none"> • M Manager • E Employee • A Assistant • I Indirect Report (IM – Indirect Report Manager) • PR Partner • C Contractor • <SF> Staff Function • <SC> Successor • B Box (Used to display org units or department only. Do not insert a person.)
5	E	No	ID	Optional information. Helps make the record unique and can contain data such as employee ID.
6	F	Yes	Last Name	Employee's last (or family) name. If fields 6, 7, and 8 are left blank, OrgPublisher treats the record as an Open Position.
7	G	No	First Name	Employee's first name.
8	H	No	Middle Name	Employee's middle name.
9	I	No	Job ID	Should contain a unique set of alpha or numeric characters for each job title or category. Does not display in the chart. For example, all Accounts Payable clerk records contain the same Job ID. Used to control the Job title display when direct reports are combined in the box with the manager or in a separate box below the manager.

Field Number	Excel Column	Required	Field Name	Description
10	J	No	Job Title	Actual job title. Appears above the name of the person in the box. Job title 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. Can be overridden by assigning the sequence number in Field 13 of the comma-delimited text file.
11	K	No	Reserved	Do not populate this field.
12	L	No	Box Sequence Number	Overrides the default positioning of the boxes. By default, boxes are positioned from left to right in your chart alphabetically, by Box ID. Input is numeric/integer only.
13	M	No	Job Sequence Number	Overrides the default positioning of the job title. By default, Job ID is used to sort multiple jobs within a single box. Input is numeric/integer only.
14	N	No	Position Sequence Only	Overrides the default positioning of the employee name. By default, multiple employee names are sorted alphabetically within a single box. Input is numeric/integer only.
15	O	No	Photo	Contains file names for photos in your chart. If all photos are placed in the same location, use the Photo Wizard to specify a common path for all of your photos. If photos are stored in different areas, provide the full path name.
16	P	No	Reserved	Do not populate this field.
17	Q	No	Position ID	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 Org Modeling and Succession Planning.
18	R	No	Level Number	Used to pass your levels for use in the multi-level peer display feature. This is a numeric absolute value level. For example, if the parent level is 10 and the report-to is 1, OrgPublisher chart the report-to box as 9 levels below the parent box.
19	S	No	Reserved	Do not populate this field.
20 and up	T+	No	Custom Field	Fields 20 and up allow you to load extra data needed to display your organizational chart. For example, the custom field of Phone Ext. can be recorded in Field 20.
Succession Planning Charts				
There are 15 fields are available for mapping when you create a Succession Planning chart.				
50	AX	No	Key Person	
51	AY	No	Location	
52	AZ	No	Age	
53	BA	No	Salary	

Field Number	Excel Column	Required	Field Name	Description
54	BB	No	Performance Rating	
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	

Comma Separated File – No Specific Order

Primary Use	<ul style="list-style-type: none"> • OrgPublisher Client • OrgPublisher Web Administration (by IT owner of the server) • Data extraction created with OrgPublisher for SAP wizards • File extension id .ocb or .csv
Advantage	<ul style="list-style-type: none"> • Fields don't have to be in a specified order • The ODB Wizard guides the user to accessing and mapping the desired fields • Client: chart administrator can map the desired fields for the chart • Web Administration: IT owner of the server can map the desired field for use by logging on to the server and launching the Client
Disadvantage	<ul style="list-style-type: none"> • Web Administration user must get IT or owner of the server involved to create the mapped connection to the .csv or .ocb file
Reminder	<ul style="list-style-type: none"> • If new fields are added to the source (.ocb or .csv file) , they must be added at the end of the record • File must be extracted with the same field order and placed in the "save" folder using the same name and file extension. Replaces the data and reuses the corresponding .otm file that contains formatting and publishing information

ODBC Wizard

Primary Use	<ul style="list-style-type: none"> • OrgPublisher Web Administration or OrgPublisher Client • Connect to any ODB-compliant database <ul style="list-style-type: none"> ○ Use a View, Query, or Table within the database ○ Can write custom SQL in the wizard • Client: can use the wizard to connect and map fields from a .csv, .txt, or .ocb file • Used to add additional data sources containing: <ul style="list-style-type: none"> ○ Additional records, such as Contractors, Interns, temps, etc. ○ Additional data about the records in the chart from another data source, such as Asset, performance, or Payroll information that is not stored in the base HR system ○ Pass succession information and use Prebuilt Reports Succession templates
Advantage	<ul style="list-style-type: none"> • Allows field mapping of required fields to create multiple charts needed from one data extraction, view, query, or table • Chart administrators can provide a comprehensive list of potential fields to the DBA. Once the extraction, view, query, or table is generated, the chart administrator can map only the needed fields
Disadvantage	<ul style="list-style-type: none"> • If additional fields are needed that are not in the view, query, or table, the database owner must modify and include the fields at the end of the current view, query, or table
Reminder	<ul style="list-style-type: none"> • ODB-compliant data can be refreshed while the chart is open in OrgPublisher

What Most Customers Do

Most customers use a Prebuilt Report chart approach to meet the needs of the most common audiences. These, typically, are created with separate data connections that contain the needed fields for each audience.

Basic Prebuilt Reports

Basic Chart

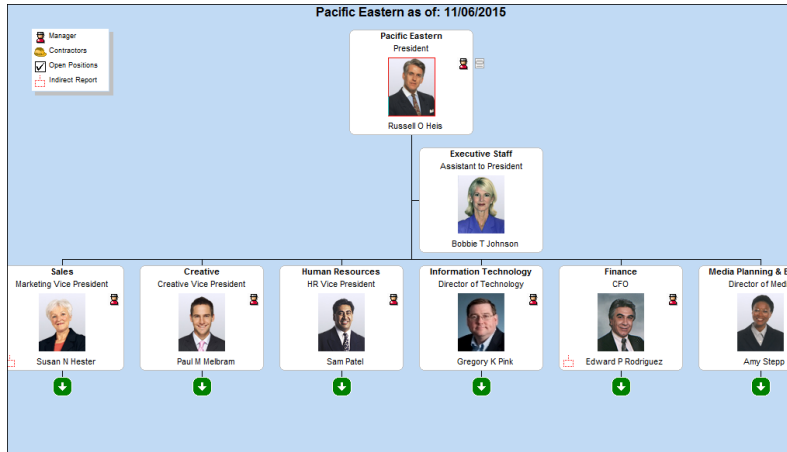


Figure 12.

Directory Chart with Photo

Name	Box Title	Job Title
Emily Abbott	Media	Media Coordinato
Lisa Abbott	Finance	Purchasing Agent
Omar Abdul	Applications	Applications Mani
Cheryl Adelsperger	Benefits	Benefits Specialist
Abigail B Alexander	Web	Web Programmer
Gail P Amster	National	Product Specialist
Caroline Anderson	Finance	Accts Rec/Cash M
Olivia K Bailey	Business A...	Programmer
Henry K Banner	Collateral	Writer
Mia P Bannister	Television ...	Producer
Elizabeth Bartlett	Finance	Capital Purchases
James Bates	Broadcast	Broadcast Media F
Justin Baxter	Finance	Purchasing Agent
Ryan B Benn	Design	Web Page Design
Carl L Best	Market Res...	Research Manage
Bryan Boynton	Finance	Purchasing Agent
Jason Bratton	Benefits	Benefits Manager
Susan I Bright	Network T...	Hardware Technic
Jenny I Rivarier	Hinh Tech...	Creative Director

Figure 13.

Directory Chart

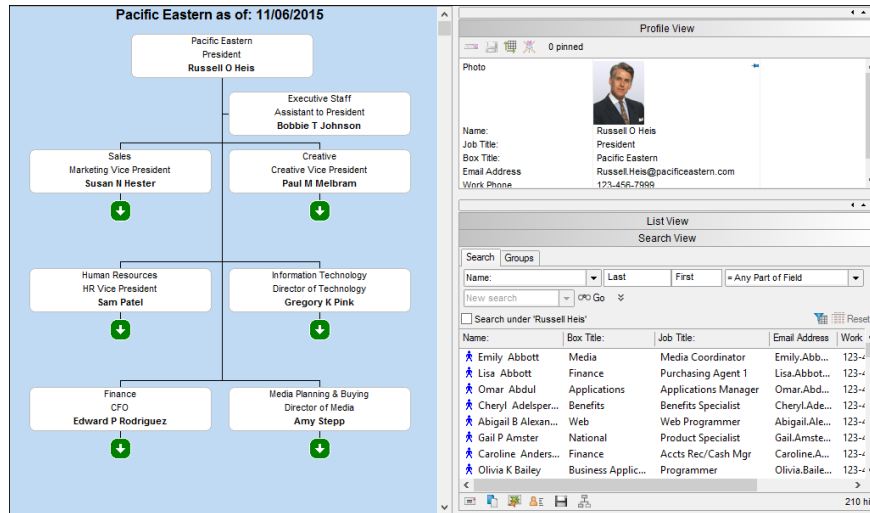


Figure 14.

Print Chart

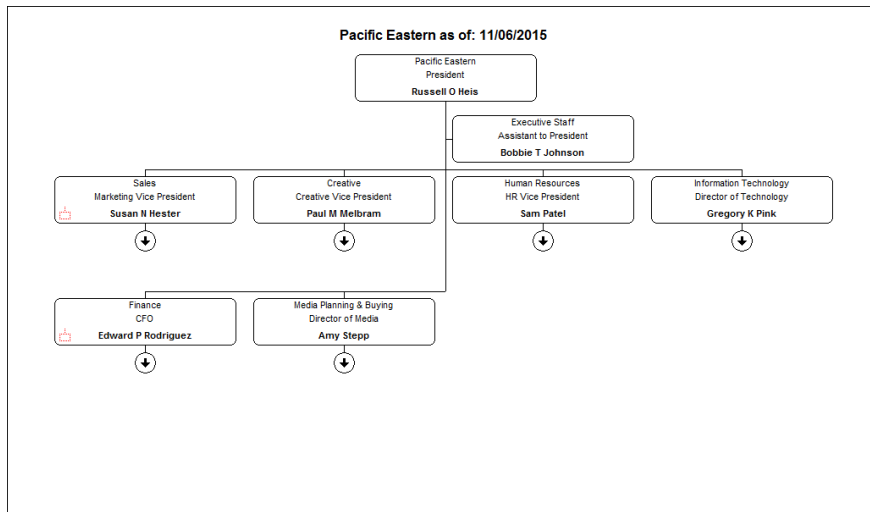


Figure 15.

Contractors Chart

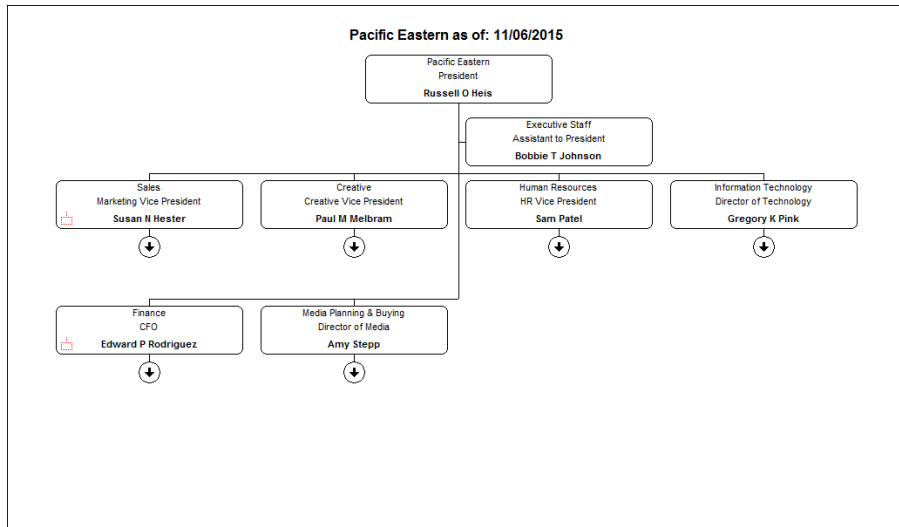


Figure 16.

Open Positions Chart

The screenshot displays the 'Open Positions' view for Pacific Eastern as of 11/06/2015. The chart shows open positions in Sales, Creative, Human Resources, Information Technology, Finance, and Media Planning & Buying. A search results window is open on the right, showing a list of employees with columns for Name, Box Title, and Job Title. The search results include 210 hits.

Name	Box Title	Job Title
Emily Abbott	Media	Media Coordinato
Lisa Abbott	Finance	Purchasing Agent
Omar Abdul	Applications	Applications Man.
Cheryl Adelsperger	Benefits	Benefits Specialist
Abigail B Alexander	Web	Web Programmer
Gail P Amster	National	Product Specialist
Caroline Anderson	Finance	Accts Rec/Cash M
Olivia K Bailey	Business A...	Programmer
Henry K Banner	Collateral	Writer
Mia P Bannister	Television ...	Producer
Elizabeth Bartlett	Finance	Capital Purchases
James Bates	Broadcast	Broadcast Media F
Justin Baxter	Finance	Purchasing Agent
Ryan B Benn	Design	Web Page Design
Carl L Best	Market Res...	Research Manager
Bryan Boynton	Finance	Purchasing Agent
Jason Bratton	Benefits	Benefits Manager
Susan I Bright	Network T...	Hardware Technic
Jenny I Bvanister	High Tech ...	Creative Director

Figure 17.

Headcount Chart

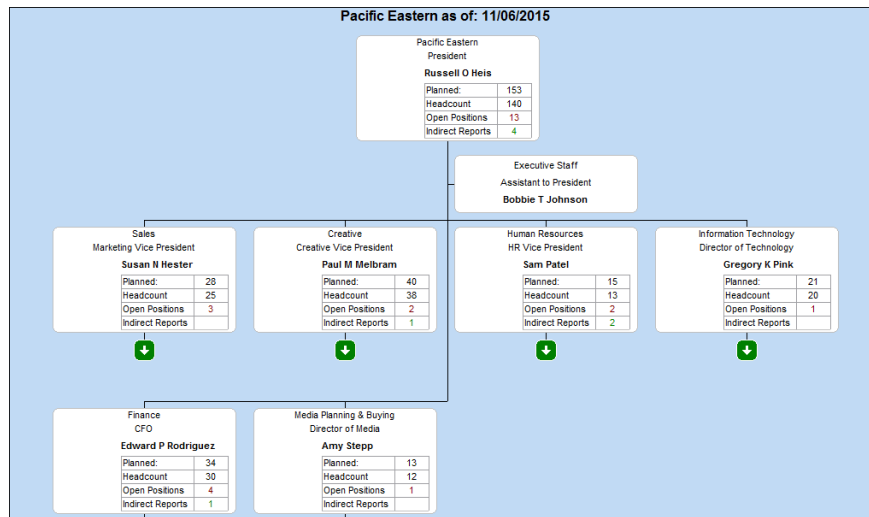


Figure 18.

Headcount with Span of Control

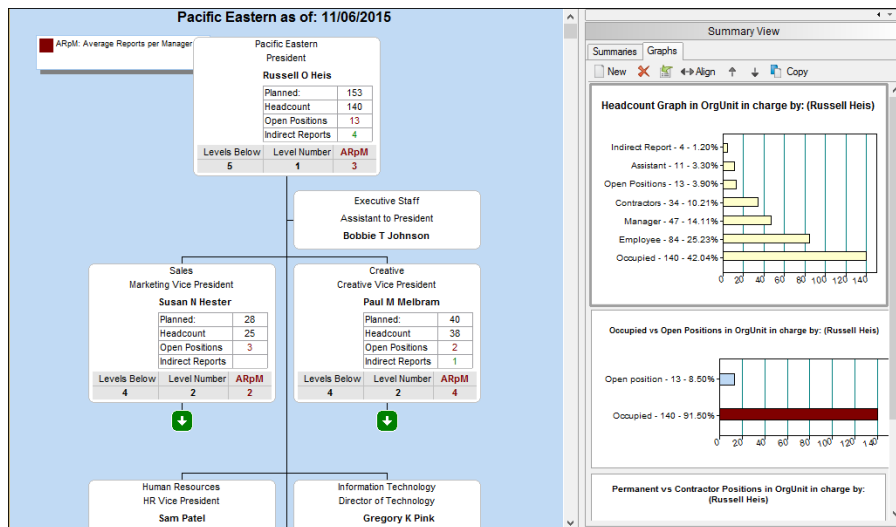


Figure 19.

Successors Chart

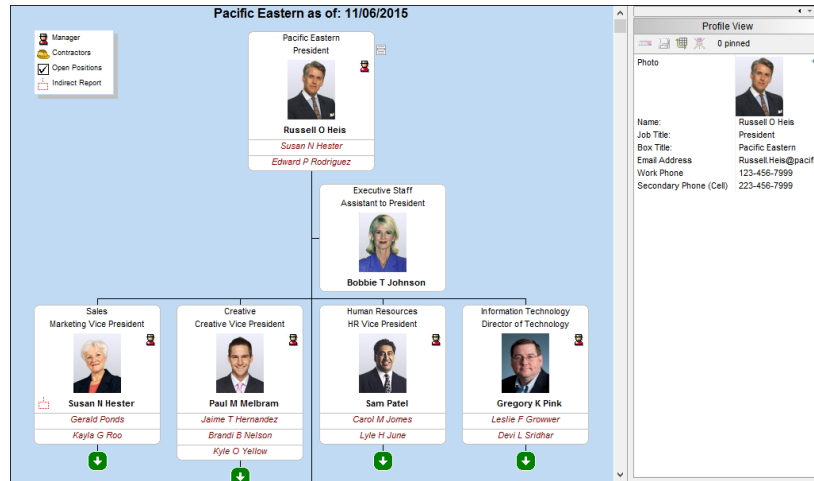


Figure 20.

Succession Plan Chart

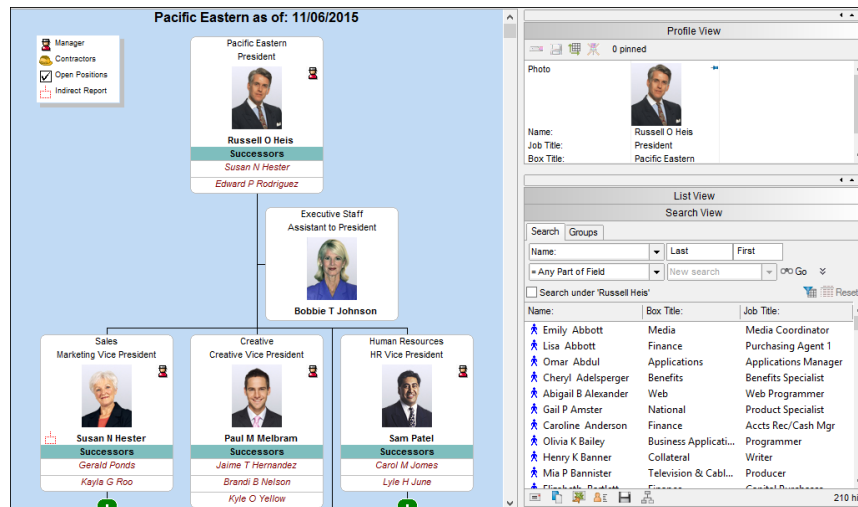


Figure 21.

Advanced Prebuilt Reports

General Viewing – Chart

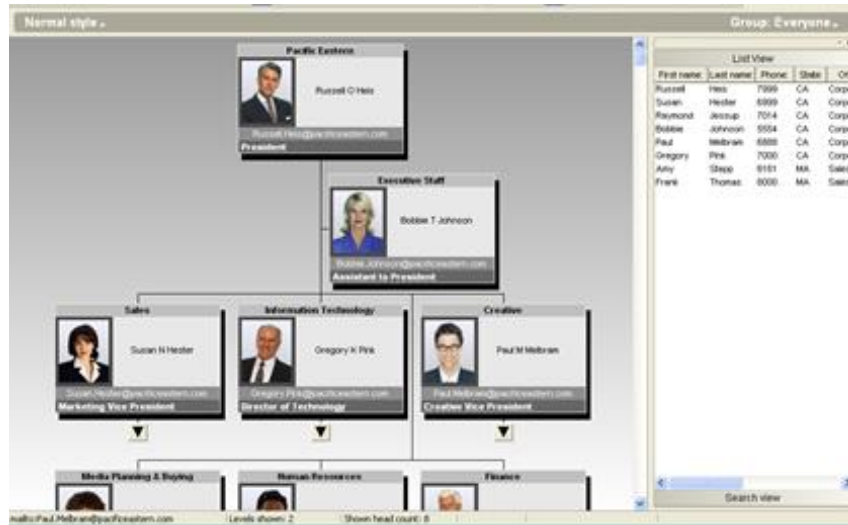


Figure 22.

General Viewing – Directory

First name	Last name	Preferred Na...	Job Title	Box Title	Phone	Email	Telecommuter	Time Zone
Amy	Shepp	Amy	Director of ...	Media Plan...	TJL1 6161	amy.stepp...		EST
April	Merrit	April	Product Sp...	National	TJL3 7799	april.merrit...	Y	CST
Bailey	Granger	Bailey	Receivable...	Accounting	TJL1 8900	bailey.gran...		PST
Bobbie	Johnson	Bobbie	Assistant t...	Executive S...	TJL1 5554	bobbie.joh...		PST
Bradley	Vick	Brad	Assistant A...	Local Sales ...	TJL2 5536	brad.vick@...		GMT
Brandi	Nelson	Brandi	Creative DL...	Creative Print	TJL1 1199	brandi.nels...		PST
Brian	Reynolds	Brian	Production ...	Production	TJL1 4544	brian.reyno...		PST
Brighton	Henry	Brighton	Desktop Pa...	Support Staff	TJL1 6666	brighton.he...		PST
Cal	Kramer	Cal	Media Plan...	Media Plan...	TJL1 7171	cal.kramer...		PST
Candace	Green	Candy	Associate P...	Public Broa...	TJL1 5989	candy.gree...		PST
Candy	Sams	Candy	Human Res...	Human Res...	TJL1 8888	candy.sam...		PST
Carl	Best	Carl	Research M...	Market Res...	TJL3 2999	carl.best@...		CST
Carla	Yellist	Carla	Research A...	Market Res...	TJL3 2200	carla.yellist...		CST

Figure 23.

Human Resources/Management Chart



Figure 24.

Organizational Planning/Succession Planning Chart

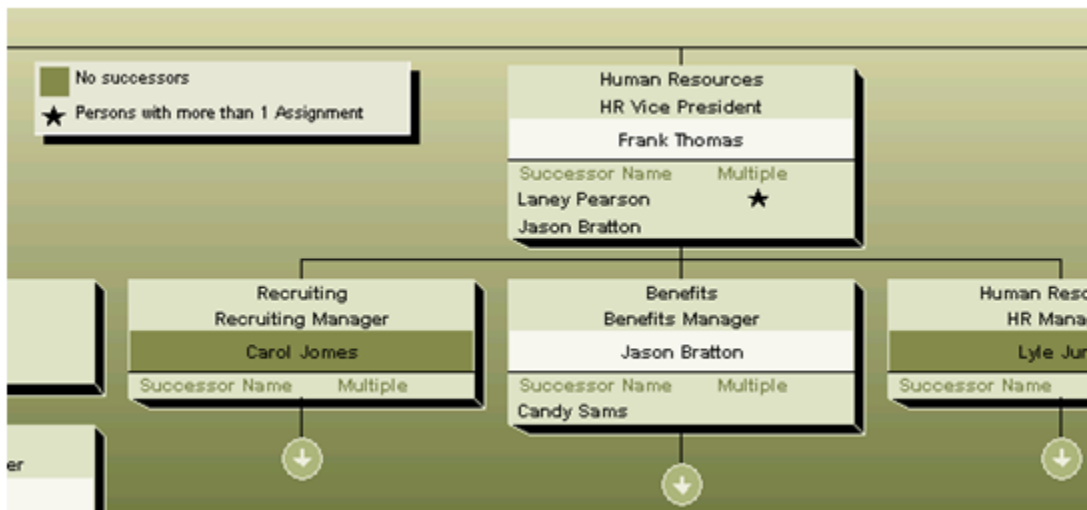


Figure 25.