

OrgPublisher Custom Fields



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Custom Fields

Prior to creating a data extraction, we recommend that you identify the audiences (types of 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. All custom fields are fields specifically identified by the customer.

Field Number	Field Name	Description
20+	Custom Fields	This fields allow you to bring in data of your choosing to display in your organizational chart. For example, the custom field of "Phone Ext." may display in 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

- They provide more information for analysis
- They provide additional sensitive data to people or groups who need to see it
- They assist 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 vacations
- Certifications
- Virtually anything you need



Define and Assign Custom Fields

Custom fields are brought into a chart must be defined and assigned to a record.

Defining a custom field includes:

- Creating a label name
- Identifying the type of data within the field
- Determining the following for summary fields (see the Summary Fields document on the <u>Support</u> Web page)
 - 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
- Setting up Hotspot attachments (see the Hotspots and Smart Links document on the <u>Support</u> Web page)
- Defining search properties
- Inputting formulas (see the Formulas document on the <u>Support</u> Web page)

Assigning a custom field determines what position types can display the field in the chart box. This assignment only occurs once, then becomes part of the template file (.otm) associated with the data feed.

1. Select **Data** in the menu then **Custom field properties** from the options list. The *Custom Field Properties* dialog opens.

С	usto	m Field Properties			Research continues				×
Γ	_								
		Field label	Туре	Calc Field	Population	Assigned To	Sample	Seq.	
		%: High Performers	Percentage		High Performer	All Position Types	0.00	137	
		Count: High Performers	Count		High Performer	All Position Types	0	138	
		Email	Hotspot			All Position Types	Kayla.Roo@pacificeast	139	
		Send Email	Text			All Position Types	Send Email	140	
		Levels Below	Levels Below			All Position Types	0	141	
		Level Number	Level Number			All Position Types	5	142	
		Field 143	Text			Click to assign		143	
		Field 144	Text			Click to assign	3	144	
		Average Reports per Ma	Average	Direct Reports	Supervisors	All Position Types	0.00	145	
		Total Planned Head Count	Count		Total Planned Hea	All Position Types	0	146	
		Open Positions	Count		Open position	All Position Types	0	147	
		Direct Reports	Direct Count		Total Head Count	All Position Types	0	148	
		Head Count	Count		Total Head Count	All Position Types	0	149	
	Þ								
		nsert Delete	Format Hotsp	oot Attachment	formula Security	View security summary	Search Properties B	ulk Edit	ı
	V	Drag and Drop for All Positi	on Types				Close	Apply	y

Figure 1.

- 2. Define the data:
 - Field label a descriptor of the data in the field.
 - **Type** defines the kind of data shown in the field

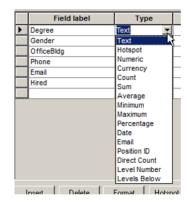


Figure 2.

- Text alpha numeric data
- **Hotspot** label for URL, API, document, etc.
- Numeric integer values that can be summarized
- Currency monetary values that can be summarized
- Calculated summary field functions: **Count**, **Sum**, **Average**, **Min**, **Max**, **Percentage**
- Date data must be in the OrgPublisher format of yyyymmdd
- Email makes the selected field a hotlink, launches the email client and includes the email address
- Position ID required for comparing two charts, OrgPlan client, and OrgHistory
- Direct Count (Premier) summary field that totals the direct counts for a parent box
- Level Number (Premier) summary field that identifies the relative chart level of a box from the top box
- Levels Below (Premier) summary field that counts the number of chart levels below the selected box
- Calc Field assigned to the numeric or currency field for summarization
- **Population** the position type or group to include in the Calc field equation
- Assigned To the box section and position type where this field is available
- **Sample** displays first data record of this type passed into OrgPublisher
- **Seq**. indicates the OrgPublisher field number where the data is located; in addition, if a formula associated with a custom field exists, an **(f)** appears in this column

Format Numeric, Currency, Summary, and Date Fields

OrgPublisher provides formatting options in the Custom Field Properties dialog to format numeric, summary, date, and currency fields. You can also select a leading symbol for the currency field.

- 1. In the *Custom Field Properties* dialog, select a **Date** field.
- 2. Click Format.

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The Select a date format dialog open.

Email	Text	
Hired	Date	Select a date format
_		Date Format: MM/DD/YYYY MM/DD/YYYY DD/DD/MM/YYYY DD/M//YYYY YYYY/MM/DD YYYY/MM/DD
Insert Delete	Format	Hotspot Attachment Formula Security

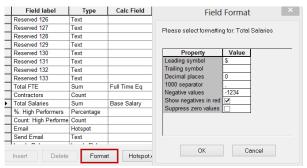
Figure 3.

- 3. Select the format you want and click **OK**.
- 4. Select a **Currency** field and click **Format**.

Field	d label	Туре	Field Format	×
Degree		Text	Thera Format	^
Gender		Text	Please select formatting for: Salary	
OfficeBidg		Text		
Phone		Text		
Email		Text	Property Value	
Salary		Currency	Leading symbol S	
			Decimal places	
			1000 separator Negative values Show negatives in red Suppress zero values	

Figure 4.

- 5. Select the appropriate symbol for the currency used in your data and click **OK**.
- 6. Select a **Sum** field and click **Format**.





- 7. Select the appropriate values for the summary field and click **OK**.
- 8. Click **Close** or **Apply** in the *Custom Field Properties* dialog.



Modify 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 designated to a specific field sequence.

In the example below, the Country field is in position 21. If the data in the chart is opened in Microsoft Excel, the Country data is in column U, the 21st column.

	Field label	Туре	Calc Field	Population	Assigned To	Sample	Seq.	L
	Country	Text	ĺ	1	All Position Types	USA	21	L
]	Salary	Text			All Position Types	32000	22	L
]	PayGrade	Text			All Position Types	C3	23	L
]	FTE	Text			All Position Types	1	24	L
]	ExemptStatus	Text			All Position Types	E	25	L
]	Birthdate	Text			All Position Types	19610829	26	L
]	RetirementDate	Text			All Position Types	20260829	27	L
]	Married	Text			All Position Types	Y	28	L
]	Dependents	Text			All Position Types	Y	29	L
]	Children	Text			All Position Types	1	30	L
]	OfficeBldg	Text			All Position Types	Corporate	31	L
]	OfficeID	Text			All Position Types	C80	32	L
]	Equipment	Text			All Position Types	PC; 15 inch Monitor	33	L
]	EquipmentID	Text			All Position Types	MI-306-C	34	L
1	ContactName	Text			Click to assign	Mary Jessup	25	L
h	nsert Delete	Format Hotsr	oot Attachment	ormula Security	View security summary	Search Properties	Bulk Edi	ita



Why Does this Matter?

If the data extraction that produces the .csv changes, or the data source used for mapping changes, there is a significant impact on the chart.

For instance, you no longer need the **Country** field and it has been removed from your data extraction query. The **Salary** field data, and all subsequent field data, moves up one sequence. **Salary** data resides in field/column 21, **PayGrade** data resides in field/column 22, etc.

However, the field labels remain as before. The **Salary** data is labeled **Country**, the **PayGrade** data is labeled **Salary**, and so on. In addition, the **Salary** data in the old **Country** field is formatted as text rather than currency.

Tips to Modify the Data Feed

- If you remove a field from your data feed, you must delete that field from the chart before you open the updated .csv file or the .odbx with the modified query. Details follow in the next section.
- If you add a field to your data, you must always add it to the end of the query pulling the data.

Note: Summary, **Layer/Level**, and **Formula** fields are generated in OrgPublisher and are not a part of the data feed. These fields do, however, take up a field sequence in the chart data. If you use Summary, Layer/Level, or Formula fields you must add a placeholder in your template for each field used. Details follow in the next section.

• You should never reorder the data feed for an existing chart.



Delete a Custom Field

Before opening the data feed where you have removed a custom field, you must open the current data feed to update the defined custom field.

- 1. Open the current chart, select **Data** from the menu, then **Custom field properties** from the options list. The *Custom Field Properties* dialog opens.
- 2. Select the field you want to remove, in this example, **Country**, and click **Delete**.

	Custom Field Properties										
	Elektrisket Zung Ook-Elekt Deputation Applyand To Deputation (apply)										
	Field label	Туре	Calc Field	Population	Assigned To	Sample	Seq.	^			
Ш.	Country	Text			All Position Types	USA	21				
	Salary	Text			All Position Types	32000	22				
	PayGrade	Text			All Position Types	C3	23				
	FTE	Text			All Position Types	1	24				
	ExemptStatus	Text			All Position Types	E	25				
	Birthdate	Text			All Position Types	19610829	26				
	RetirementDate	Text			All Position Types	20260829	27				
	Married	Text			All Position Types	Y	28				
	Dependents	Text			All Position Types	Y	29				
	Children	Text			All Position Types	1	30				
	OfficeBldg	Text			All Position Types	Corporate	31				
	OfficeID	Text			All Position Types	C80	32				
	Equipment	Text			All Position Types	PC; 15 inch Monitor	33				
Þ	EquipmentID	Text			All Position Types	MI-306-C	34				
	ContactName	Text			Click to assign	Mary Jessun	35	~			
	nsert Delete	Format Hotsp	ot Attachment F	ormula Security	View security summary	Search Properties	Bulk Edit	or			
•	Drag and Drop for All Positi	ion Types				Close	Apply	y			



- Click **Yes** in the delete confirmation prompt.
 The **Salary** field data is now in sequence location 21.
- 4. Close the dialog and then save and close the chart.
- 5. Pull your updated data extraction. All data and label definitions match, and are now moved up one row.

Insert Placeholder for New Custom Field

Before opening the data feed where you have added a custom field, you must open the current chart to update the defined custom fields.

- 1. Open the current chart, select **Data** from the menu then **Custom field properties** from the options list. The *Custom Field Properties* dialog opens.
- 2. Select the first Summary, Layers/Levels, or Formula field.

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In this example, **Years of Employment**, sequence 52, is the first Formula field.

I	Field label	Туре	Calc Field	Population	Assigned To	Sample	Seq.	
1	Prior_Position1	Text		1	All Position Types	Invoicing Clerk	46	
1	Potential	Numeric			All Position Types	40	47	
1	HR_Specialist	Text			All Position Types	20031	48	
1	Tenure	Numeric			All Position Types	7	49	
1	Yrs_to_Retire	Numeric			All Position Types	17	50	
1	Age	Numeric			All Position Types	48	51	
I	Years of Employment	Text			All Position Types	(f) No Hire Date	52	П
1	Merged Text	Text			All Position Types	(f) F,African American	53	1
I	Salary + 5% increase	Text			All Position Types	(f) 33600	54	1
1	Retirement Possibility	Text			All Position Types	(f) Not enough data	55	1
1	Possible Salary Increase	Text			All Position Types	(f) No data	56	1
1	Subtract 1	Text			All Position Types	(f) 0	57	1
T	firstlast	Text			All Position Types	(f) Margaret, Scott	58	1
1 h	nsert Delete	Format Hotsp	oot Attachment F	Formula Security	View security summary	Search Properties E	Bulk Edi	to



3. Click **Insert** and then click **Yes** at the insert prompt message.

58	Field label	Туре	Calc Field	Population	Assigned To	Sample	Seq.	1
	Potential	Numeric			All Position Types	40	47	
	HR_Specialist	Text			All Position Types	20031	48	1
	Tenure	Numeric			All Position Types	7	49	1
	Yrs_to_Retire	Numeric			All Position Types	17	50]
	Ane	Numeric			All Position Types	48	51	
•	Label 40:	Text			Click to assign		52	n
	Years of Employment	Text			All Position Types	(T) NO HIRE Date	53	
	Merged Text	Text			All Position Types	(f) F, African American	54	
	Salary + 5% increase	Text			All Position Types	(f) 33600	55	
	Retirement Possibility	Text			All Position Types	(f) Not enough data	56	
	Possible Salary Increase	Text			All Position Types	(f) No data	57	
	Subtract 1	Text			All Position Types	(f) 0	58	
_	firstlast	Text			All Position Types	(f) Margaret,Scott	59	
l	nsert Delete	Format Hotsp	ot Attachment	ormula Security	View security summary	Search Properties E	ulk Edil Appl	

Figure 9.

The inserted field is now sequence 52, and **Years of Employment**, as well as all subsequent fields, has moved down a sequence.

- 4. Close the dialog and then save and close the chart.
- 5. Pull your updated data extraction. The newly added custom field data is in sequence 52. <u>Define and assign</u> the field.

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

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

The remaining buttons in the *Custom Field Properties* dialog are defined in detail in the appropriately named documents on the <u>Support</u> Web page. A short description for each is noted here.

					~
Insert Delete Format	Hotspot Attachment F	ormula Security	View security summary	Search Properties	Bulk Editor

Figure 10.

- **Hotspot Attachment** sets up the link to access web pages, open another program or document
- **Formula** (Premier) uses VB script to alter data or perform more advanced calculations on numeric custom fields
- **Security** sets access to the published chart at the hierarchy and EChart field levels
- View security summary displays a summary of EChart field level security
- Search Properties sets fields as searchable and enables synonyms (alternate text) to be used in searches (VP for Vice President, etc.)