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 Support Web page)

    o   What field is used in the calculation?
    o   What part of the organization should be included in the summary?
    o   What formatting is applied to the result?

- Setting custom field security

- Setting up Hotspot attachments (see the Hotspots and Smart Links document on the Support Web page)

- Defining search properties

- Inputting formulas (see the Formulas document on the Support 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.
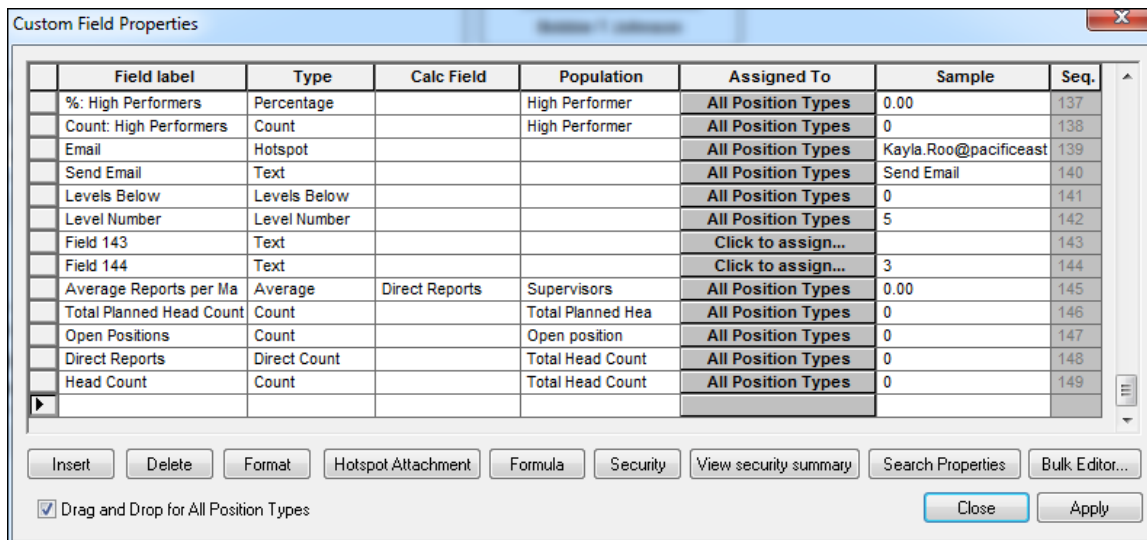
Custom Field Properties

	Field label	Type	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

| Insert | Delete | Format | Hotspot Attachment | Formula | Security | View security summary | Search Properties | Bulk Editor... |

☑ Drag and Drop for All Position Types   Close   Apply

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**.
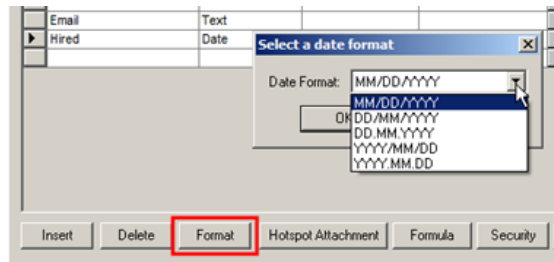
The *Select a date format* dialog open.

Figure 3.

3. Select the format you want and click **OK**.

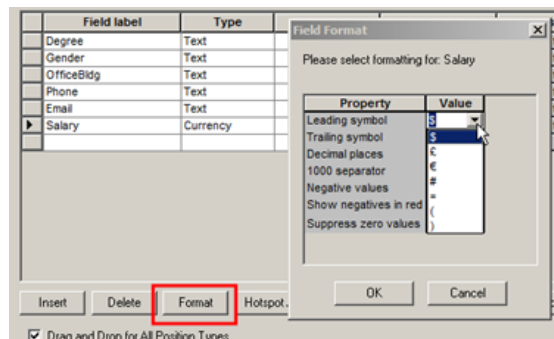4. Select a **Currency** field and click **Format**.

Figure 4.

5. Select the appropriate symbol for the currency used in your data and click **OK**.

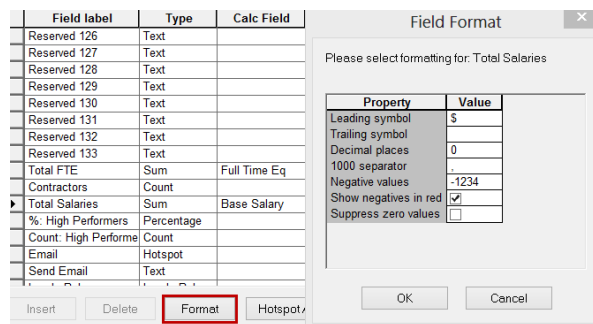6. Select a **Sum** field and click **Format**.

Figure 5.

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.

Figure 6.

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**.
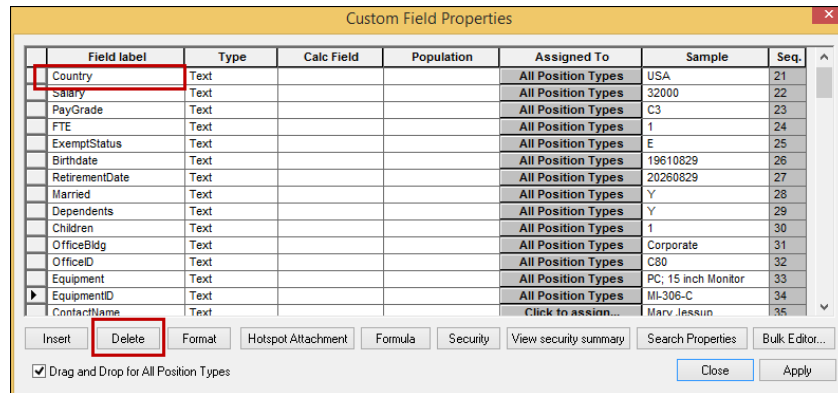

Figure 7.

3. 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.

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

Figure 8.

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

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. Define and assign the field.

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 [Support](#) Web page. A short description for each is noted here.
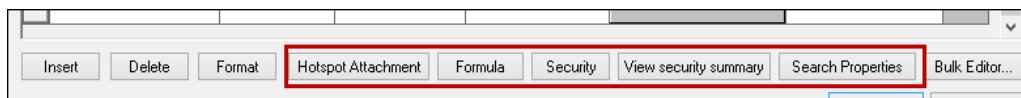

Figure 10.

- **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.)