

OrgPublisher Executive Security Options

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Introduction

This document is intended for the OrgPublisher chart administrator and provides guidelines on creating and publishing employee data to OrgPublisher Executive™ on Apple® iPad®, as well as details on end user capabilities.

This document is meant for use after the implementation of OrgPublisher Executive is completed. Web server configuration for either hosted or on premise implementation is handled by Professional Services.


An actual chart is not created when publishing to OrgPublisher Executive. Employee data is available to filter and view in several layouts.

For help troubleshooting problems viewing a chart, please contact [customer support](#).

Publishing to OrgPublisher Executive on iPad

In the OrgPublisher chart:

- Verify that the current top box is where you want OrgPublisher Executive to start on iPad. The top of chart cannot be changed after publishing. You can create a new publishing definition with an alternate top of chart and publish.
- If you used the Advanced Box Layout Editor to format chart boxes, create a position type with basic formatting exclusively for OrgPublisher Executive.
- Review the columns displayed in the List View and the widths of those columns. Selections made in this view define what the OrgPublisher Executive users see in the List View on iPad. For optimal performance, select less than five columns of data.
- Review the fields in the Profile View under Name. These are the fields shown in the OrgPublisher Executive Talent Card.
- If you plan to use Active Directory security, verify that the network login and password fields have been imported into OrgPublisher.

1. In the main toolbar, click .
2. Select **Advanced Mode** and click Next.
3. The next dialog is informational only. Click Next.
4. Enter a name for your chart and click Next.
5. Select **Interactive Org Chart** and click Next.
6. Select Interactive Publishing Type **iPad** and click Next.
7. Choose [Email options](#).
8. Select a [style and position type](#) to be used for formatting boxes in the org chart views.
9. Enable the [Geographic Mapping Feature](#) to display the geographic location of employees in your organization.
10. Select a file name and path for the published chart.
11. Specify the URL of the **Virtual Directory** on the Web server.
12. Select a chart [security option](#).
13. Select **iPad Performance** options.
14. Enable the **Data Error Publish Notification Email**.
15. Create an archive of the published chart.
16. Click **Finish** to publish.

OrgPublisher displays the URL for the OrgPublisher Executive data on iPad.



Figure 1.

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Verifying IIS Service

Once the chart data is published and before you open OrgPublisher Executive on iPad:

- Verify **IIS** service is enabled by typing the URL you just created into a browser. A dialog similar to the graphic below should be the result.

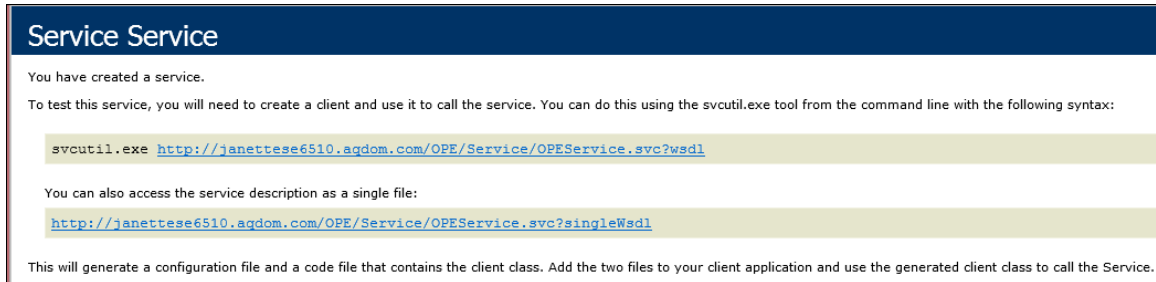


Figure 2.

- Additional samples of a URL for iPad:

Hosted:

<https://companyid.peoplefluent.com/companyid/service/opeservice.svc>
<http://companyid.peoplefluent.com/companyid/service/opeservice.svc>

On Premise:

<http://janettese6621/OPE/service/opeservice.svc>

OrgPublisher Executive Chart Security

You can select the type of security to assign to OrgPublisher data on iPad. In addition to the options listed below, you can use the OrgPublisher hierarchical, custom field, and style/group security options.

Chart security options

- **Unsecured** – All users can view the entire chart. Enables anyone who has access to the OrgPublisher Executive application to view the chart data.
 - **Require PIN** - Restricts access to only OrgPublisher Executive users with your authorized PIN (Personal Identification Number).
- **Secured** –
 - **Chart – User enters user ID and password** only allows users with assigned IDs and passwords access to the OrgPublisher Executive data.

Note: This is the Security option you select when using Active Directory. See the [Configuring Active Directory](#) section for more details.

- **Allow user to cache password** – Provides end users with the option to make OrgPublisher Executive remember their password.
- **Password field** – Selected from your custom field data.
- **User ID field** – Selected from your custom field data.
- **Sync data starting at** – Allows you to choose the level; recommended to choose the lowest level possible for iPad efficiency
- **Sync interval - Require or Recommend** sync every **X** days defaults to **15** days, but you can select a specific timeframe.

Note: Organization levels of **All Reports** and **Direct Reports** are available in OrgPublisher Executive only when you add security using this dialog.

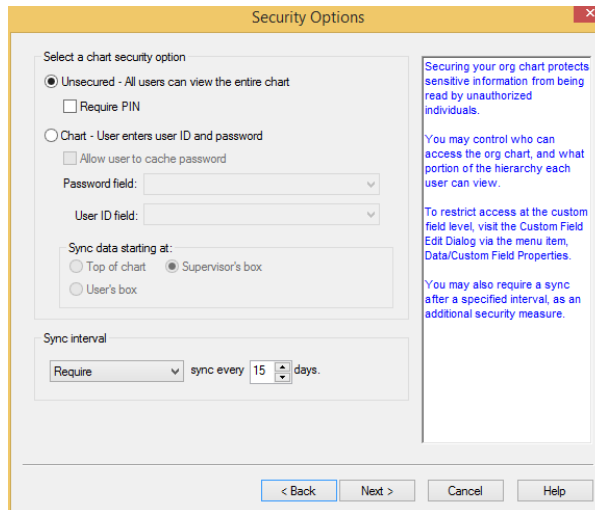


Figure 3.

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Configuring for Active Directory

The OrgPublisher web.config file must be modified if you plan to use Active Directory as a security option when publishing for iPad. You can [prompt for a user ID and domain or use the default domain](#) for multi or single network.

1. Create your chart, importing the network ID into the UserID field in the OrgPublisher input file, and save it.
2. Navigate to your publish to location folder (default location is **C:\Program Files (x86)\OrgPub11\Silverlight\Service**) and open the **Web.config** file.
3. Add the following keys to **<appSettings><!-- Security Settings -->** section:

Setup for Multi-network domain configuration to prompt user for Domain\UserID:

In the service\web.config file in the applications settings section, include the CheckActiveDirectory and ActiveDirectoryDomain keys as shown below:

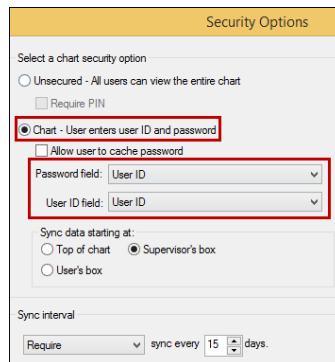
```
<add key="CheckActiveDirectory" value="true" />
<add key="ActiveDirectoryDomain" value="" />
```

Setup for Single/Multi-network domain configuration to use default Domain without prompting the user for the Domain:

In the service\web.config file in the application settings section, include the CheckActiveDirectory and ActiveDirectoryDomain keys as shown below:

```
<add key="CheckActiveDirectory" value="true" />
<add key="ActiveDirectoryDomain" value="[domain_name]" />
```

4. Return to OrgPublisher and publish a chart for iPad using the **Chart – User enters user ID and password** security option in the Publisher Wizard.



5. Publish the chart for iPad and then, before you access the chart on the iPad, navigate to the publishing location.
6. Run the **IIS7_Setup.bat** file to complete configuration.
7. Open OrgPublisher Executive on the iPad and type the publish to URL (as provided in the Publishing Wizard) into the Settings dialog.

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- Before the chart data opens, you are prompted to type your user ID and password.

Securing an EChart Custom Field

In addition to the security options selected in the Publishing Wizard, you can also use other security options within OrgPublisher.

You can designate custom fields as not searchable in published charts. The fields are still visible in the chart but end users will not be able to search for them.

- Select **Data** from the menu bar, then **Custom Field Properties** from the pull-down menu. You can also use the Custom fields button  in the toolbar.

The Custom Field Properties dialog opens.

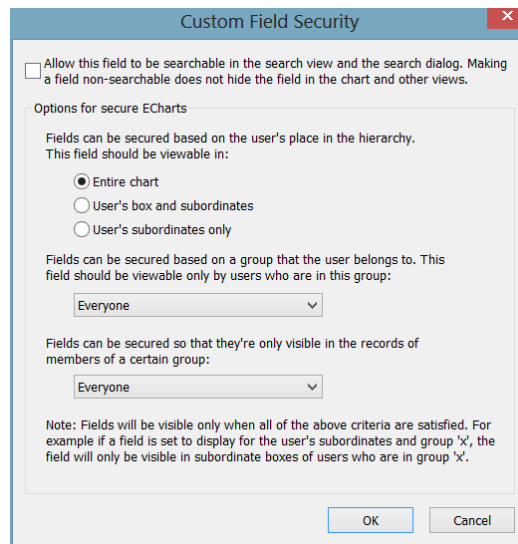


Figure 4.

- Position the cursor at the custom field you want to secure and click **Security**. The Custom Field Security dialog opens.
- The **Allow this field to be searchable** check box is a default option. If you do not want end users to search using this custom field, clear the check box.
- Depending on where you want the security to start, based on the end user's place in the chart, select **Entire chart**, **User's box and subordinates**, or **User's subordinates only**.
- If you want to secure fields based on a group, allowing only members of the selected group to view the field, click the down-arrow and choose a group. Accept the default of **Everyone** if you if all users are allowed to view the field.
- If you want to secure fields so that they are only visible in the records of members of a selected group, click the down-arrow and choose a group. Accept the default of **Everyone** if you do not need this feature.
- Click **OK** to return to the Custom Field Properties dialog. Click **Cancel** if you do not want to apply your changes to security. All security criteria must be met in order for the selected custom field to display in the chart.

Securing Styles to a Group

In securing styles to groups, you must remember that each chart viewer must have access to at least one style.

1. Select **File** from the Main menu then **Styles** from the options list. The Styles dialog opens.
2. Select the style you want to secure by clicking on it in the top pane of the dialog.

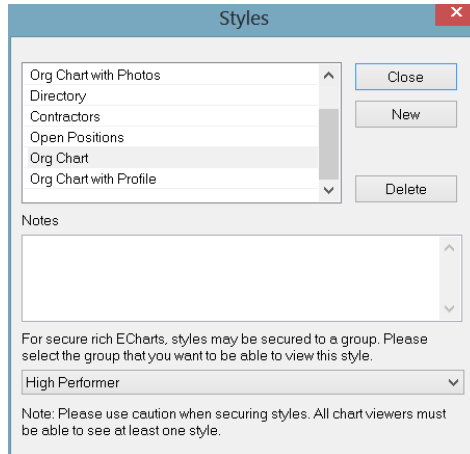


Figure 5.

3. In the lower pane, use the down-arrow to select the group to which you want to secure the style. You may also create a new style to secure to a group.
4. Click **Close**. The Chart View displays your group and style.
 - Maximum Number of records to sync to iPad defaults to 20,000 records. The more records allowed in the sync process the longer that process takes. Choosing the lowest number possible for your organization helps increase the performance of OrgPublisher Executive in iPad.
 - Maximum Number of levels to sync to iPad defaults to All levels, but you can select a specific number of levels to sync. Choosing the lowest number possible for your organization helps increase the performance of OrgPublisher Executive in iPad.

Setting Data Sync Options in OrgPublisher

You can sync the OrgPublisher Executive data on iPad with your HR in OrgPublisher. If your OrgPublisher installation is on premise, you must have OrgPublisher 11 installed to sync to your data.

The **chart administrator** establishes the sync settings during the publishing process.

1. If OrgPublisher Executive is secured, select the starting point for the data sync.

2. Select the **Sync data starting point**.

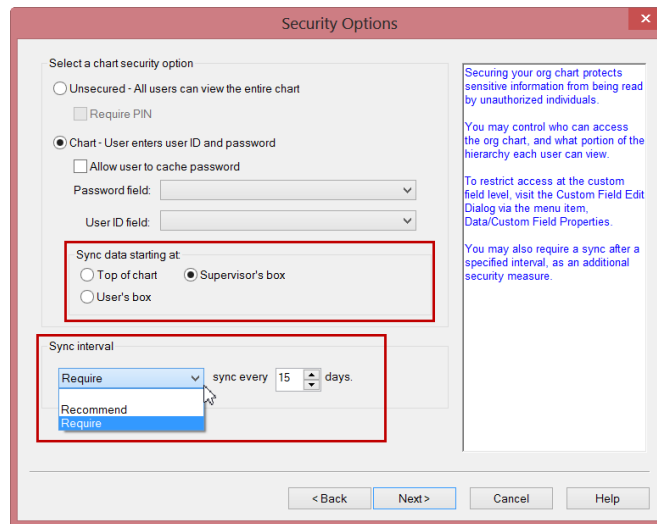


Figure 6.

3. Choose whether to **Recommend** or **Require** a sync.
4. Select the photo download option. Choosing to download photos during each sync can affect the iPad performance.

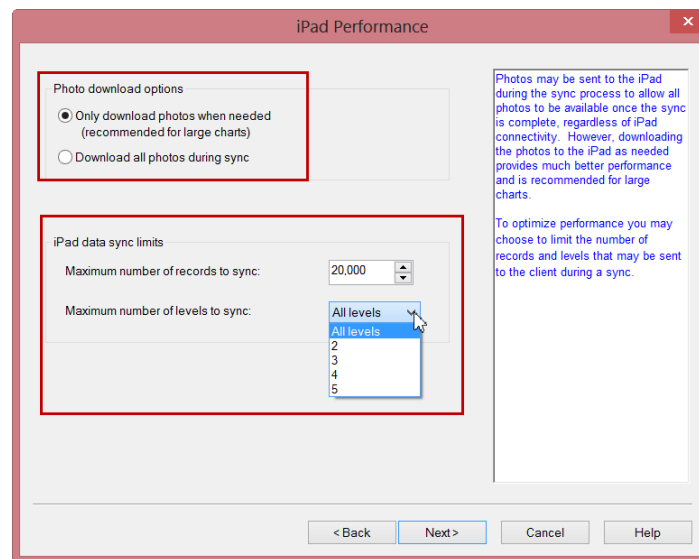


Figure 7.

5. Select the maximum number of records and levels to sync.


Configuring OrgPublisher Executive Settings on the iPad

iPad End User Responsibilities

The Settings dialog is accessed from the OrgPublisher Executive Home page after you have successfully installed the application.



Figure 8.

1. Click the Settings button  in the upper-right corner of the page. The OrgPublisher Executive Settings dialog opens.

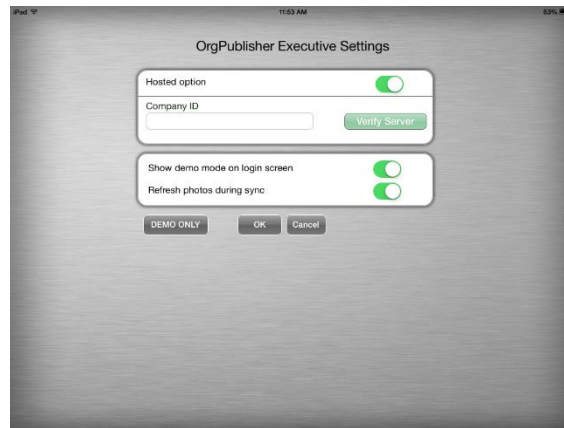


Figure 9.

2. If you are a hosted customer, verify that the hosted button in the upper-right corner is set to **ON**, and type your **Company ID** as provided by your administrator. (The Company ID is determined during the implementation process.)



Figure 10.

If you are not a hosted customer, verify that the hosted button in the upper-right corner is set to **OFF**.



Figure 11.

On premise is the option you want to use when you are accessing data through a "customized domain," whether that domain is on premise or is a non-standard hosted URL.

Other settings options can include:

Entering a PIN



Figure 12.

Note: The end user is responsible for creating and maintaining the PIN number. If lost, the OrgPublisher Executive settings must be reset and a new PIN number used.

Once the PIN is entered in the Settings dialog, it must be entered on the Home page every time OrgPublisher Executive is accessed. The keypad automatically displays at the bottom of the page.



A dialog box titled "PIN" with a text input field containing a blue cursor. Below the input field are two orange buttons: "Sign In" and "Sync".

Figure 13.

Entering a User Name and Password

The User Name and Password are taken from selected fields in the OrgPublisher data file. The Settings dialog provides a **Remember password** button to allow end users to cache their password, so it is automatically called after entering the **User Name** on the Home page.



A dialog box with two text input fields. The first is labeled "User Name" and the second is labeled "Password". Below the input fields are two orange buttons: "Sign In" and "Sync".

Figure 14.



A horizontal toggle switch labeled "Remember password" on the left and "ON" on the right. The switch is currently in the "ON" position.

Figure 15.

If the "caching" is enabled, the keypad automatically displays at the bottom of the Home page to enable typing of the password.

Logging in to a Proxy Server

If OrgPublisher Executive is set up to use a proxy server, the following dialog opens. Type your Login name and Password, then click Login. The keypad automatically opens at the bottom of the Home page.




A dialog box titled "Login to proxy server" with two text input fields: "Login" and "Password". Below the input fields are two buttons: "Cancel" and "Login".

Figure 16.

Opening Employee Data in OrgPublisher Executive

Once OrgPublisher Executive has been configured, you can access your HR data.

Type the URL to your chart data and click the green Verify Server button  to the right of the ID field to verify the link.

https://companyid.peoplefluent.com/companyid/service/opeservice.svc

OR

http://YourServerName/OPE/service/opeservice.svc

If the connection is successful, a check mark appears to the right of the URL in the dialog.




Figure 17.


The **Previous server URLs** section can now display the publishing definition for easier identification.



Figure 18.

iPad Sync Process

The **iPad end user** performs the data sync, either at fixed intervals or when notified to do so on the home page. If the **Sign In** option is not enabled on the Home page, then a **Sync** is required. The sync notice appears below the  button when opening OrgPublisher Executive.

In addition, the iPad user can now open the Settings  dialog and decide whether or not to **Refresh photos during sync** by turning that option on or off.

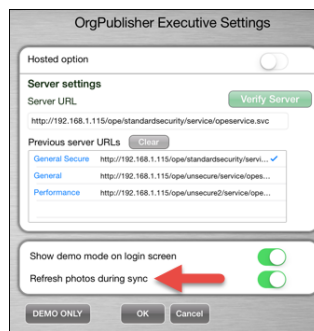


Figure 19.