OrgPlus Enterprise 3.0
Administrator Guide

Release 3.0.0
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About This Guide

This guide provides an in-depth description of how to install, setup, and manage OrgPlus Enterprise.

This guide contains the following chapters:

- **Chapter 1, Introduction**, provides an overview of OrgPlus Enterprise.
- **Chapter 2, OrgPlus Enterprise Server**, describes the hardware and software required to host OrgPlus Enterprise.
- **Chapter 3, OrgPlus Enterprise Installation**, describes how to install OrgPlus Enterprise.
- **Chapter 4, Source Data Requirements**, describes how source data must be formatted in order to be compatible with OrgPlus Enterprise.
- **Chapter 5, OrgPlus Enterprise Setup**, describes how to configure OrgPlus Enterprise using the administration web pages.
- **Chapter 6, Managing Views**, describes how to create and edit chart views using the OrgPlus Enterprise administration web pages.
- **Chapter 7, Security**, describes how to control access to sensitive data.
- **Chapter 8, Advanced Features**, describes how to take advantage of advanced features including groups, conditional formats, and formulas.
- **Chapter 9, System Tools**, describes how to use OrgPlus Enterprise system tools for viewing activity logs and configuring application settings.
- **Chapter 10, Change Management Setup**, describes how to configure the change management module.
- **Chapter 11, Change Management Administration**, describes how to manage the change request approval process.

Additional documentation can also be found at our website: [www.humanconcepts.com](http://www.humanconcepts.com).

Typographic Conventions

The following typographic conventions appear in this guide:

- Names of keyboard keys are enclosed by angle brackets (<>), (for example, Press <Enter>). Press <Alt>+<A> means to simultaneously hold down the <Alt> key on the keyboard and press the letter <A>.
- Buttons and tabs on the screen are shown in bold (for example, Click OK).
- Information that you enter appears in bold face, (for example, Type A:\setup).
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Chapter 1

Introduction

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Overview

OrgPlus is the industry leader in organizational charting software. For over a decade, the OrgPlus solution has been used for managing organizational charts and supporting critical business decisions.

OrgPlus Enterprise provides a web-based solution for organizational charting. Any person in your organization can access organizational information using nothing more than a web browser.
About OrgPlus Enterprise

OrgPlus Enterprise connects directly into your corporate database and provides you with real-time access to your organizational data and charts. You can also use OrgPlus to chart almost any tree diagram, such as a work breakdown or a parts explosion.

OrgPlus Enterprise has the following benefits:

- High performance handling of large data sets
- High quality, sophisticated organizational charts
- Sophisticated features such as conditional formats and formulas
- Role-based security to control access to restricted data
- Robust security architecture that easily integrates into existing enterprise infrastructure
- Corporate directories to find specific records
- Data visualization tools such as profiles and indexes
- Sophisticated printing, exporting and publishing features
- Easy navigation of complex charts
- Drag and drop planning and modeling tools
- Seamless integration with OrgPlus Desktop products, Adobe and Microsoft Office desktop products including Excel and PowerPoint
- Support for a wide variety of data sources including LDAP, Active Directory, ODBC, Oracle, SQL Server, XML, SAP, and OLE DB.
- Easy integration with HR systems, such as SAP and PeopleSoft
- Easy integration with other web applications and portals
The OrgPlus Solution

OrgPlus Enterprise solves the deployment, security, visualization and distribution issues associated with organizational charting. From within OrgPlus Enterprise you can take a snapshot of any chart and then create scenarios or plans using the OrgPlus Enterprise Modeler.

You can also download any chart to your computer. Downloaded charts can be edited or viewed using one of our OrgPlus Desktop products (Standard, Professional, and Reader). OrgPlus Desktop products provide a robust environment for planning, modeling and analysis. OrgPlus Desktop products also enable you to create high quality custom charts that can be used in presentations or integrated into Microsoft Office documents. OrgPlus Desktop products are also useful as offline tool for working with charts.

The following diagram illustrates how the OrgPlus Solution can be used in the HR environment.

OrgPlus Enterprise Server Administration

The OrgPlus Enterprise Administrator Interface allows you to manage your OrgPlus Enterprise Server. You can access the administrator interface with any web browser.

This guide provides instruction on how to install and configure OrgPlus Enterprise Server.
OrgPlus Enterprise 2.X

OrgPlus Enterprise 2.X releases contained many new features and enhancements. Here are some highlights:

**Dotted-line Reporting**

In many companies, a single individual may appear in an organizational chart multiple times. Individuals of this type have dotted-line reporting relationships to one or more managers. OrgPlus Enterprise enables you to easily navigate through all occurrences of a dotted-line report.

**Chart Org Unit**

OrgPlus Enterprise now enables you to chart an entire Org Unit for any given employee. For example, you can chart the entire Engineering department no matter which employee within that department is selected.

**Chain of Command**

The Chain of Command option enables you to view all the supervisors for the displayed chart. When the Chain of Command toolbar button is selected, all supervisors (direct and indirect) for the current top position are displayed. OrgPlus Enterprise also allows you to control how many levels are shown when displaying the chain of command for any chart.
LDAP Support

LDAP data sources are now supported. OrgPlus Enterprise also supports additional configuration parameters for LDAP (Active Directory) connections. This helps to ensure connectivity even in the more complex network environments.

Advanced Search

With the advanced search functionality you can specify multiple criteria when searching your corporate directory.

Dynamic Role Switching

OrgPlus Enterprise now allows users with access to restricted data to dynamically switch their role to the default role. This allows these users to collaborate with co-workers without having to log in using a different account.

Enhanced Data Export

All data export functions (Send to Excel, Save as OPX, Send to Modeler, Send to PDF, and Send to PowerPoint) have been enhanced to give users greater control over exported and published content. Also users can now export data from the corporate directory and OrgTree modules.

Enhanced Role Determination

The role for each user can be determined by applying a "role rule" to the data record that corresponds to the current user. A "role rule" is attached to a specific data source and consists of one or more conditions. For example, if the data record corresponding to the current user indicates that the user is member of the HR team, then that user can automatically be assigned the HR Administrator role.

Additional Data Sources and Security Adapters

OrgPlus Enterprise 2.X supports an ever-growing list of data source and security adapters. Supported adapters include Excel, OLE DB, SAP, Kronos, PeopleSoft, SQL Server, LDAP, Active Directory and OrgPlus Desktop (OPX).

Enhanced Field Level Security

A role may limit what fields a user is allowed to view on a box by box basis. For example, an HR administrator in England may be limited to viewing personal information of only English employees.

Structural Security

A role may limit what part of the organizational structure a user is allowed to view. For example, if a company is composed of three divisions: automotive, aerospace, and electronics, members of the automotive division may be limited to viewing the organizational structure of only the automotive division.
SSL Support
Secure Sockets Layer (SSL) is the standard security technology for creating an encrypted link between a web server and a browser. The SSL link ensures that all data passed between a web server and your browser remains private and secure. SSL is an industry standard and is used by millions of websites in the protection of their online transactions with their customers.

Merged Data Sources
OrgPlus Enterprise now allows you to combine hierarchies from different data sources into a single organizational chart.

Mapped Fields
OrgPlus Enterprise now supports mapped fields. Mapped fields enable administrators to map a field to a set of pictures. For example, you can map location (US, France) to a picture of a country flag and then display that flag in your chart boxes.

Merged Fields
OrgPlus Enterprise now supports merged fields. Merged fields are typically used to create composite fields from one or more fields (Full name from Last, First and Middle name fields). Merged fields also allow you to create context sensitive hyperlinks in your chart boxes.

Kronos Integration
OrgPlus Enterprise can be integrated with Kronos Workforce Central.

Improved Password Handling
“Forgot password” support as well as reset password on first usage.

Text File Data Sources
OrgPlus Enterprise now allows you to specify a text file as a data source.

Improved PeopleSoft Security Integration
Authenticate users using PeopleSoft username and passwords.

Support for the latest Microsoft Tools
OrgPlus Enterprise is now compatible with SQL Server 2005 and .NET 2.0.

Improved Security
OrgPlus Enterprise is now more secure. Security enhancements included encrypted database connections (SQL Server) and encryption of all configuration files.
Improved Charting
Support for co-manager styles. Hyperlinks now support target specification (open in a new window, target window, or existing window).

Improved IIS Integration
OrgPlus Enterprise has improved interaction with IIS resulting in better performance and faster recovery from server reboots and IIS process cycling.

FireFox and Safari Support
OrgPlus Enterprise can now be accessed via Safari and FireFox internet browsers. Macintosh® users and Linux users can now access OrgPlus Enterprise.

OrgPlus Enterprise Modeler
You can now create and edit scenarios directly in your browser using the OrgPlus Enterprise Modeler.

Improved Refresh
Flat file (Excel or text file) based data sources can be set to automatically refresh whenever the contents of the file are changed.

Improved Single Sign On Support
The generic SSO adapter supports encryption.

Improved SAP Integration
OrgPlus Enterprise works seamlessly with the latest releases of SAP including mySAP ERP 2005.

Web Farm Support (OrgPlus Enterprise High Availability)
OrgPlus Enterprise can now be run in web farm behind a load balancer. Contact sales@humanconcepts.com for more information on OrgPlus Enterprise HA.

Enhanced Master Page
OrgPlus Enterprise now gives you more control over the placement of chart titles and corporate logos. Handling of titles and logos with respect to printing and export to PDF and PowerPoint has also been improved.

Themes and Customization
You can now set the color scheme within OrgPlus Enterprise to match your corporate color scheme. You can also customize strings and hide user interface elements. This is especially useful when integrating OrgPlus Enterprise into other web applications and corporate portals.
OrgPlus Enterprise 3.0 Highlights

OrgPlus Enterprise 3.0 has many new features and enhancements. Here are some highlights:

**Improved Administration Interface**

OrgPlus Enterprise administration is now more powerful. New features include group definition, index definition and profile definition. All views within a domain now share defined profiles, indexes, and groups.

**Deeper SAP Integration**

OrgPlus Enterprise continues to lead in SAP Integration. OrgPlus Enterprise can read data directly from SAP using SAP’s HR-OCI (Organizational Charting Interface). OrgPlus also supports single sign on from SAP Enterprise Portal. OrgPlus Enterprise 3.0 can now query SAP for Position to Position hierarchies in addition to the existing support for OrgUnit to OrgUnit hierarchies.

SAP integration features include XI data sources, enhanced SAP Enterprise Portal integration (SAP UI themes), Business Package certification and “Powered by NetWeaver” certification.

**Enhanced PowerPoint Publish**

You can now publish charts to PowerPoint as single page presentations or in book format. A published PowerPoint book can include a cover page, table of contents and an index. You can also specify a PowerPoint template when publishing charts to PowerPoint.

**Enhanced PDF Publish**

You can now publish charts to PDF as single page presentations or in book format. A published PDF book can include a cover page, table of contents and an index.

**Multi-record Boxes**

Charts can now include boxes that contain more than one record. For example, the sales team reporting to a manager can be represented in a single box.
Enhanced Formulas

OrgPlus Enterprise now includes a more sophisticated engine for handling calculations.

Hotspots

OrgPlus Enterprise now lets you define any area within a box as a hotspot. Move the cursor over a hotspot within a box to dynamically display a profile.

Improved Charting

OrgPlus now allows you to set the background color and border style for any cell within a box. You can now place field labels anywhere in a box (above, below, left or right of the corresponding field). OrgPlus also allows you to create fixed size boxes and fixed size columns within boxes.
**Improved Duplicate Record Handling**

Chart boxes can now include a list of alternate managers for any employee that has more than one manager allowing you to navigate directly to a specific occurrence of an employee that appears multiple times in a chart. You can also display alternate managers using a callout. Moving the mouse cursor over the callout icon will display a callout containing the alternate managers to whom the employee reports.

**myTree**

The myTree panel is a customized org tree dynamically generated for each end user. For example, HR Professionals can view a tree that contains only those individuals and branches for which they are responsible.

**Enhanced Directory**

OrgPlus Enterprise now supports directories that are not based on hierarchical information (for example, conferences rooms or company facilities). You can also search for orphan records (employees and branches that are not included in the org chart).

**Automatic Branch Style Optimization**

You can now configure OrgPlus Enterprise to automatically optimize branch styles. End users can select different branch styles to achieve optimal chart layout when viewing, publishing, or printing charts.

**OrgPlus 7 Desktop Template Compatibility**

OrgPlus Enterprise can now load templates created with OrgPlus 7.

**Multi-level Administration**

OrgPlus Enterprise now supports two types of administrators. Chart administrators and System administrators. Chart administrators cannot modify system and security parameters but can add and modify presentation elements including charts, profiles, indexes, and directories.

**E-mail Alerts**

You can now configure OrgPlus Enterprise to send administrators e-mail alerts whenever a scheduled data refresh fails. You can also include data refresh warning messages in your e-mail alerts.

**Domains with Orphan Records**

You can configure domains to include orphans records (records that are not part of the hierarchy) to allow end users and administrators to search and chart records or islands (branches not included in the main hierarchy) that are part of the organization but not included in the hierarchy. You can include orphans when exporting data to the OrgPlus Enterprise Modeler or to OrgPlus Desktop applications.
Domains without Hierarchy
You can create domains that do not include hierarchies, such as a list of Branch Offices, Cost Centers, or Conference Rooms.

Automatic Co-Manager Detection
You can configure OrgPlus Enterprise to automatically detect co-managers then set the branch style accordingly.

Enhanced Bookmarks
Users can now reorder bookmarks.

Change Management
OrgPlus Enterprise 3.0 includes a Change Management Module. A separate license key is required to activate the Change Management module.

The Change Management Module empowers employees by allowing them to submit change requests. Employees can request that a record be updated, transferred, removed, or added. This not only helps to keep organizational information up to date but also reduces the administrative burden on HR and IT.

Change Requests are not immediately reflected in the org chart. Each request must pass through an approval process to ensure that the request is valid. Typically one or more HR specialists are in charge of the approving change requests. The workflow process for approving changes is included in the Change Management Module.

Once a change request is approved it is routed back to the source HR system. After a change request is recorded into the HR system, OrgPlus Enterprise automatically updates the associated organizational charts.
Chapter 2

OrgPlus Enterprise Server

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Overview

This chapter details the hardware and software required to host OrgPlus Enterprise Server.
System Requirements

To host OrgPlus Enterprise Server you must have a dedicated server that meets the following requirements:

Minimum Hardware
- Pentium IV processor or equivalent
- Single Xeon recommended for > 200 concurrent users
- Dual Xeon recommended for > 500 concurrent users
- Must have administrative rights to install OrgPlus Enterprise
- Internet connectivity required

Minimum Memory
**Note:** These requirements do not account for the resources required for the OrgPlus Enterprise database.
- 2GB recommended > 10,000 employees or 500 concurrent users*
- 4GB recommended for > 25,000 employees or 2000 concurrent users*
*Concurrency rates vary based on usage. Typically 500 concurrent users equals a user based of 50,000 users.

Minimum Hard Disk Space
- 40 GB of free disk space

Operating System
- Windows Server 2003 family products

Required Software
- Microsoft Internet Information Services (IIS) 6.0 or later
- Microsoft Data Access Components (MDAC) 2.7 or later
- Microsoft .NET 2.0 framework
- Microsoft SQL Server (2000 or later) or Oracle (9i or later)

OrgPlus Enterprise High Availability

Customers with needs for higher performance or fault tolerance may want to consider OrgPlus Enterprise High Availability (HA).

OrgPlus Enterprise HA is designed to run on a web farm behind a load balancer.

Contact sales@humanconcepts.com for more information about OrgPlus Enterprise HA.
OrgPlus Enterprise Hosted

OrgPlus Enterprise is available as an on-demand enterprise solution. Via the OrgPlus Hosted service, you can deploy OrgPlus Enterprise to your organization without the cost of installing, upgrading and maintaining a server in-house. See www.orgplus.com for more details.

Network Considerations

In order for end-users to access the OrgPlus Enterprise Server, it must be connected to your corporate network. In addition, you must obtain a static IP address from your network administrator. Then configure the OrgPlus Enterprise Server computer with this IP address using the standard Windows network configuration utilities.

You should also request a Domain Name Service (DNS) entry for your OrgPlus Enterprise Server from your network administrator. Typically, the DNS entry for OrgPlus Enterprise Server follows a naming convention such as ope.mycompany.com where “mycompany” is the name of your company.

Database Considerations

OrgPlus Enterprise requires a Microsoft SQL Server (or Oracle) Database to store application information such as user names and passwords. You can install Microsoft SQL Server either on the OrgPlus Enterprise Server or on a network accessible remote machine. Please contact ope.support@humanconcepts.com for additional information on choosing the correct database solution for OrgPlus Enterprise.

External data used to create charts and directories can be stored in LDAP (Active Directory), SQL Server, Microsoft Access, SAP, OLE DB, Microsoft Excel, text files, OPX (OrgPlus Desktop) files or any other ODBC compliant database. Any database or file containing external data can be located directly on the OrgPlus Enterprise Server or on any other machine on your network.

System Recovery

Your OrgPlus Enterprise server should be backed up on a regularly scheduled basis. You will need to work with your IT department to make sure that the OrgPlus Enterprise server is backed up.

The key components required for recovery are machine specific settings (i.e. changes to IIS configuration or OS configuration) and the OrgPlus Enterprise application database. After reinstalling (or recovering) OrgPlus Enterprise on a new server, you will need to restore the OrgPlus Enterprise application database using database utilities (i.e. SQL Server Enterprise Manager). You will also need to make sure that all changes to machine specific settings are updated correctly.
Overview

This chapter tells you how to install OrgPlus Enterprise Server, log in as an administrator and enter your license key.
Before You Install OrgPlus Enterprise

OrgPlus Enterprise requires the installation of some additional components on your server.

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Microsoft Components

OrgPlus Enterprise Server requires Microsoft IIS (Internet Information Services) 6.0 or later. OrgPlus Enterprise Server also requires Microsoft .NET 2.0 framework and MDAC 2.7 (or later) to be installed.

Application Database Configuration

OrgPlus Enterprise requires Microsoft SQL Server 2000 or later as an application database. In addition, SQL Server must be running in Mixed Mode. Oracle (9i or later) is also supported.

SSL Certificates

OrgPlus Enterprise supports secure connections to SQL Server using SSL (Secure Sockets Layer). You must install a server certificate on the database server and configure the appropriate SSL settings. Please contact ope.support@humanconcepts.com for additional information.

Additional Setup Information

Please visit the OrgPlus Enterprise support center at www.orgplus.com/support/ for additional server setup information including IIS setup hints.
In order to use OrgPlus Enterprise Server, you must install it on your server’s hard drive. After purchasing OrgPlus Enterprise you will be sent an email containing a link that enables you to download the OrgPlus Enterprise Installer to your server’s hard drive.

**Note:** OrgPlus Enterprise High Availability (HA) requires configuration of OrgPlus Enterprise so that it can run in a web farm environment. Contact ope.support@humanconcepts.com for information on how to install and configure OrgPlus Enterprise HA.

➢ **To install OrgPlus Enterprise:**

1. In the OrgPlus Enterprise Installation folder, double-click Setup.Exe to display the OrgPlus Enterprise Setup Wizard window.

2. Click **Next** to view the License Agreement. Accept the terms of the license agreement by selecting the **I Agree** radio button.

3. Click **Next** to view a list of required components. If any of these components are not installed, click the **Cancel** button to exit the installer. Install the required components and then rerun the installer from step 1.
4 Click Next to display the OPE Database Installation Details window.

5 Use the Browse... button to specify the path to your Database Server. OrgPlus Enterprise requires an application database to store user preferences and administrative settings.

   Note: If SQL Server is not installed on the local machine, replace the server parameter value (local) with the server name or IP address of the host machine. For example, if your host machine name is mysqlserver, you should edit the connection string to read server=mysqlserver.

6 Enter the Database Name of the application.

   Note: The database will be created on the default instance of the database server specified in server parameter. For named instances, the server parameter value should have the format <hostname>\<instancename>.

7 Specify the user authentication method you prefer:

   - Windows authentication credentials of current user – Select this option if you want the installer to use Windows Authentication to connect to the application database.
   - SQL Server authentication using user id and password below – Select this option if you want the installer to use SQL Server Authentication to connect to SQL Server for the creation of the application database. If you select this option, enter the Admin username and the Admin password for SQL Server authentication.

   Note: Please ensure that the Windows domain user running the installer or the System Administrator Login has the appropriate permissions on SQL Server.
8 Enter the **Application database OrgPlus user information**.
   - **Username**: Enter the OrgPlus user name.
   - **Password**: Enter the OrgPlus user password.

9 Click **Next** to display the **Destination Folder** window.

The Destination parameters are as follows:

- **Web site name**: Name of the Web site at which users will access OrgPlus Enterprise.
- **Virtual directory**: Name of the directory created under IIS home directory.
- **Description**: Description of the directory created under IIS home directory.
- **Port**: Port number for the web site being used.
   
   **Note**: By default, the installer will install OrgPlus Enterprise on the Default Web Site on port 80. If you want another web site, you will need to enter the port number assigned to that web site.

- **Application pool**: In IIS 6.0, you can create an application pool to contain one or more applications, for example, to isolate all the Web applications that are running on the same computer. If you are using application pools, you can use this drop-down menu to specify one to contain OrgPlus Enterprise.

- **Install HumanConcepts OrgPlus Enterprise website files to**: Shows the current location of the OrgPlus Enterprise website files. To change the location, click the **Change**... button.

10 Click **Next** to display the **Confirm Installation** window.
11 Click **Next** to perform the installation.

12 Click **Close** to complete the installation.

### Upgrading OrgPlus Enterprise

You can use the installer to upgrade OrgPlus Enterprise. In order to upgrade OrgPlus Enterprise Server, you must run the installer on the OrgPlus Enterprise server.

**Note**: Make sure you unzip the installer before proceeding.

➢ **To Upgrade OrgPlus Enterprise:**

1. In the OrgPlus Enterprise Installation folder, double-click **Setup.Exe** to display the **OrgPlus Enterprise Database Installation Details** window.

   ![OrgPlus Enterprise Installation Details Window](image)

   - **Database Server**: Displays the database server on which your current database is located.
   
   - **Database Name**: Displays the name of your database.
   
2. Specify the user authentication method you prefer:
   
   - **Windows authentication credentials of current user** – Select this option if you want the installer to use Windows Authentication to connect to the application database.
• **SQL Server authentication using user id and password below** – Select this option if you want the installer to use SQL Server Authentication to connect to SQL Server for the creation of the application database. If you select this option, enter the **Admin username** and the **Admin password** for SQL Server authentication.

  **Note:** Please ensure that the Windows domain user running the installer or the System Administrator Login has the appropriate permissions on SQL Server.

• Application database OrgPlus user information – Displays the OrgPlus **Username** and **Password**.

  3 Click **Next** to confirm your settings and display the **Confirmation** window.

  4 Click **Install** to display the **Completing the OrgPlus Enterprise Upgrade** window.

  5 Click **Finish** to complete the upgrade process.
Multiple OrgPlus Enterprise Environments

Multiple instances of OrgPlus Enterprise can be installed on the same server. Each instance has its own application database and has no access to the data stored in any other instance. This is useful if you want to maintain multiple environments (Development, Test, and Production). For more information, visit the OrgPlus Enterprise support center at www.orgplus.com/support/.

Administrative Login

After installing OrgPlus Enterprise Server, you can access the administrative web pages using the administrator URL.

➢ To access the OrgPlus Enterprise Administrative Interface:

1. Launch Internet Explorer.

2. Type the Administrator URL in the Internet Explorer Address Bar and click the Go button to display the OrgPlus Enterprise Sign In page.

The administrator URL for the standard installation has the following format (where <host name> is the DNS entry defined for your OrgPlus Enterprise server).

http://<host name>/OPEHA/Modules/Admin/AdmFrame.aspx

Note: If you have specified a different virtual directory during installation, the administrator URL will be in the format:
http://<host name>/Virtual Directory/Modules/Admin/AdmFrame.aspx

**Note:** You can use IIS (Control Panel | Administrative Tools | Internet Information Services) to create a redirect such as http://<host name>/admin/. Redirects are typically used to create URLs that are easier to remember.

3 Type root into the **User Name** field.

4 Type the root password into the **Password** field. The default password is root.

5 Click the **Sign In** button to display the OrgPlus Enterprise Admin page.

**Note:** After you have logged in, it is recommended that you change the default password for the root account. Use the **Security | Root Password** panel to change the password.

**Note:** When you have finished, make sure you sign off by clicking the **Sign Off** link.
User Access

You can access the user web pages by entering the user URL.

➢ To access the OrgPlus Enterprise:
  1. Launch Internet Explorer.
  2. Type the user URL in the Internet Explorer Address Bar and click the Go button to display the OrgPlus Enterprise Sign In page.

The user URL for the standard installation has the following format, where `<host name>` is the DNS entry defined for your OrgPlus Enterprise server.

http://<host name>/OPEHA/Default.aspx

**Note:** If you have specified a different virtual directory during installation, the administrator URL will be in the format:

http://<host name>/<virtual directory>/Default.aspx

**Note:** You can use IIS (Control Panel | Administrative Tools | Internet Information Services) to create a redirect such as http://<host name>/OPEHA/. Redirects are typically used to create URLs that are easier to remember.

  3. Enter your user name and password and click the Sign In button to access the OrgPlus Enterprise Home page.

**Note:** When you have finished, make sure you sign off by clicking the Sign Off link.

OrgPlus Enterprise License Key

When you purchase OrgPlus Enterprise, you receive an email containing a license key. The license key determines how many records you can chart using OrgPlus Enterprise.

For example, if you purchase OrgPlus Enterprise 5000, you are limited to charting up to 5000 records. If you attempt to chart more than 5000 records, OrgPlus Enterprise continues to function; however, the charts will contain a text notification that your license has been exceeded.

Please contact sales@humanconcepts.com if you have any licensing issues or questions.

**Note:** License keys have a format of xxxx-xxxx-xxxx-xxxx.

➢ To enter your license key:
  1. Login to the Administrative Interface, as described in Administrative Login on page 3-8.
2 In the **Admin Explorer** on the left of the browser window, select **OrgPlus Enterprise** from within the **License** node to display the License Page.

3 Enter your license key in the **License Code** field.

4 Click the **Update** button.

**Note:** After purchasing OrgPlus Enterprise, you will receive an invoice via email. The invoice contains your license key. If you do not enter a license key, you can still use OrgPlus Enterprise for 30 days.

### Change Management License Key

When you purchase OrgPlus Enterprise, you can also purchase the Change Management module. A license key is required to activate the Change management module.

In the **Admin Explorer** on the left of the browser window, select **Change Mgmt** from within the **License** node to display the License Page. Enter your license key in the **License Code** field and click **Update**.

### OrgPlus Enterprise Modeler Licenses

When you purchase OrgPlus Enterprise, you can also purchase OrgPlus Enterprise Modeler licenses as needed. When you purchase licenses you receive an Enterprise Modeler Key that provides Modeler functionality to one end user for each license purchased.

Please contact sales@humanconcepts.com if you have any licensing issues or questions.

**Note:** License keys have a format of xxxx-xxxx-xxxx-xxxx.

**To enter an OrgPlus Enterprise Modeler license key:**

1 Login to the Administrative Interface, as described in *Multiple OrgPlus Enterprise Environments* on page 3-8.
2. In the Admin Explorer on the left of the browser window, elect Enterprise Modeler from within the License node. Make sure the License tab is selected.

<table>
<thead>
<tr>
<th>License</th>
<th>License Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>License type</td>
<td>0 Active Licenses</td>
</tr>
<tr>
<td>License code</td>
<td></td>
</tr>
</tbody>
</table>

3. Enter your license key in the License Code field.

4. Click the Update button.

**Note:** You can monitor license usage using the License Status tab.

---

**OrgPlus Enterprise Modeler License Management**

A modeler license is required for each user that needs access to the OrgPlus Enterprise Modeler. If all licenses are used, additional users will not be allowed to access the modeler. If this occurs, you can purchase additional licenses or release existing ones for use by other users.

➢ **To release a Modeler license:**

1. Login to the Administrative Interface, as described in *Multiple OrgPlus Enterprise Environments* on page 3-8.

2. In the Admin Explorer, select Enterprise Modeler from within the License node. Select the License Status.

<table>
<thead>
<tr>
<th>Name</th>
<th>IP Address</th>
<th>First Usage</th>
<th>Last Usage</th>
<th>Usage Count</th>
</tr>
</thead>
</table>

**Total seats** indicates the total number of licenses you have purchased.
**Used seats** indicates the number of users that currently have access to the Modeler. Each time a user accesses the Modeler for the first time, this number increments by one until all licenses are in use. The user’s **Name, IP Address, First Usage** date and time, **Last Usage** date and time, and **Usage Count** (number of times that user has used the Modeler).

**Available seats** indicates the remaining number of unused licenses.

3 Select the checkbox to the left of one or more user names.

4 Click the **Delete** button.

**Note:** You can restrict a user’s access to the OrgPlus Enterprise Modeler via a user’s role. See *Chapter 7, Security* for details.
Chapter 4

Source Data Requirements

In this chapter...

- **Overview**
- **Source Data**
- **Department Field**
- **Chart User ID**
- **Conditional Formats**

Overview

OrgPlus Enterprise can create charts or directories from data stored in a variety of file formats, databases, and directories; however, the external data must be stored in a format that can be processed by OrgPlus Enterprise.
Source Data

The source data must contain two required fields and any number of optional fields.

**Required Fields**

Data sources must contain a **Position** field and a **Reports To** field. OrgPlus Enterprise cannot build a hierarchical chart unless these fields are available.

- **Position**
  Each record must have a **Position** field. Usually a numeric ID, such as a position code or employee ID, functions as the unique identifier. You can also use an email address. Avoid using an employee name, as names are not unique.

- **Reports To**
  In order to determine the reporting relationship (who reports to whom), each record must contain a **Reports To** field. The **Reports To** field enables OrgPlus to build a hierarchical chart.

In the following example, a source table has four fields. The four fields are **Position**, **Reports To**, **Name** and **Title**. **Position** functions as the unique identifier for each record.

<table>
<thead>
<tr>
<th>Position</th>
<th>Reports_To</th>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Chris Philips</td>
<td>President</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Lynn Brewer</td>
<td>Chief Financial Officer</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Larry Stevens</td>
<td>Vice President</td>
</tr>
</tbody>
</table>
Optional Fields

You can add any number of optional fields to your source data. OrgPlus Enterprise supports numeric, text, picture, or date data types. You can also control how fields are formatted using OrgPlus templates (see Chapter 5, OrgPlus Enterprise Setup).

Picture Fields

OrgPlus Enterprise enables you to include pictures in your charts. Pictures must be stored on your local server or any other server accessible by the OrgPlus Enterprise server.

OrgPlus Enterprise identifies a field as a picture field based on the file type extension. The supported extensions are .jpg, .jpeg, .gif, and .bmp.

To include a picture field, create a text column in your database table and format it as follows:

<table>
<thead>
<tr>
<th>Position</th>
<th>Reports_To</th>
<th>Name</th>
<th>Picture</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Chris Philips</td>
<td><a href="http://myserver.com/pictures/philips.jpg">http://myserver.com/pictures/philips.jpg</a></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Lynn Brewer</td>
<td><a href="http://myserver.com/pictures/brewer.jpeg">http://myserver.com/pictures/brewer.jpeg</a></td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Larry Stevens</td>
<td><a href="http://myserver.com/pictures/stevens.gif">http://myserver.com/pictures/stevens.gif</a></td>
</tr>
</tbody>
</table>

If your data source does not explicitly contain a picture field, you can create a merged field using one or more existing fields. See Merged Fields in Chapter 5 for more information.
Hyperlinks

OrgPlus Enterprise enables you to include hyperlinks in your charts. These hyperlinks are automatically detected.

**Note:** If you want a label other than the actual hyperlink to be displayed in your chart, you can include both a label and a hyperlink separated by a colon (Label:Hyperlink) in your database table.

To include a hyperlink create a text column in your database table and format it as follows:

<table>
<thead>
<tr>
<th>Position</th>
<th>Reports_To</th>
<th>Name</th>
<th>Web_Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Chris Philips</td>
<td>My bio:<a href="http://server.com/employee_bios/philips.htm">http://server.com/employee_bios/philips.htm</a></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Lynn Brewer</td>
<td>My bio:<a href="http://server.com/employee_bios/brewer.htm">http://server.com/employee_bios/brewer.htm</a></td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Larry Stevens</td>
<td>My bio:<a href="http://server.com/employee_bios/stevens.htm">http://server.com/employee_bios/stevens.htm</a></td>
</tr>
</tbody>
</table>

Email Addresses

OrgPlus Enterprise enables you to include email addresses in your charts, which it automatically detects as email addresses.

To include email addresses, create a text column in your database table and format it as follows:

<table>
<thead>
<tr>
<th>Position</th>
<th>Reports_To</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Chris Philips</td>
<td><a href="mailto:chris@mycompany.com">chris@mycompany.com</a></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Lynn Brewer</td>
<td><a href="mailto:lynn@mycompany.com">lynn@mycompany.com</a></td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Larry Stevens</td>
<td><a href="mailto:larry@mycompany.com">larry@mycompany.com</a></td>
</tr>
</tbody>
</table>

IsAssistant

OrgPlus Enterprise can automatically format assistant boxes in your chart if you add a column called **IsAssistant** to your source data table.

<table>
<thead>
<tr>
<th>ID</th>
<th>ReportsTo</th>
<th>Name</th>
<th>Title</th>
<th>IsAssistant</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Chris Phillips</td>
<td>CEO</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Corrine Speer</td>
<td>Executive Secretary</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Lynn Brewer</td>
<td>Chief Financial Officer</td>
<td>0</td>
</tr>
</tbody>
</table>
Setting **IsAssistant** to 1 for a record makes the corresponding box an assistant. For example, if the **IsAssistant** field for Corinne Speer is set to 1 in the import file, the resulting chart is formatted as follows:

![Chart Example](image)

**Note:** You can also use the Chart Rules functionality to automatically format assistants. See *Chapter 7 Advanced Features* for more information.

### Duplicate Records

Your organizational charts may contain employees who report to more than one manager. In order to show dotted-line or matrix reports in your charts, your data must contain a field that uniquely identifies each employee. This unique key can also be used to identify employees that report to more than one manager.

In the following example, Fred Rice acts both as the Director of Public Relations and as the Acting Finance Manager.

<table>
<thead>
<tr>
<th>Position</th>
<th>ReportsTo</th>
<th>Name</th>
<th>Title</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Colleen Knapp</td>
<td>Dir Public Relations</td>
<td>5011</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Radha Agarwal</td>
<td>Research Manager</td>
<td>5022</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Fred Rice</td>
<td>Online Mktng Mgr</td>
<td>5023</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>Tom Forlani</td>
<td>Marketing Comm Mgr</td>
<td>5024</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>Bin Xie</td>
<td>Public Relations Mgr</td>
<td>5040</td>
</tr>
<tr>
<td>6</td>
<td>1</td>
<td>Fred Rice</td>
<td>Acting Finance Mgr</td>
<td>5040</td>
</tr>
</tbody>
</table>

The resulting chart appears as follows:

![Chart Example](image)

**Note:** Any person that appears more than once in your organizational chart has a ☰ icon in lower right corner of their box. Click this icon to navigate to the next occurrence of that person.
Note: An employee that appears multiple times within the chart may report to more than one manager. See Chapter 6, Managing Views for more information on display of employees with alternate managers.

Department Field

Adding a field to your data source that indicates the department (or OrgUnit) of each employee is highly recommended. The department field can be used to create an OrgTree. The OrgTree enables you to explore an organization using a hierarchical tree of department information.

Chart User ID

For some role determination methods and for field level security, OrgPlus Enterprise needs to be able to match the current user to a box within a chart. By determining which box corresponds to the current user, OrgPlus Enterprise can enforce structural and field level security. To take advantage of these features, your data must contain a chart user ID field that can be matched to the user when they log into OrgPlus Enterprise.

For example, if the user id “msmith” is used to log into OrgPlus Enterprise, OrgPlus Enterprise can then match Martin to the record with Position=5.

<table>
<thead>
<tr>
<th>Position</th>
<th>ReportsTo</th>
<th>Name</th>
<th>Title</th>
<th>Chart User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Lynn Brewer</td>
<td>CEO</td>
<td>lbrewer</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Larry Stevens</td>
<td>VP Sales</td>
<td>lstevens</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Claire Chancellor</td>
<td>VP Engineering</td>
<td>cchancellor</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>Gary Truman</td>
<td>VP Operations</td>
<td>gtruman</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>Martin Smith</td>
<td>VP Finance</td>
<td>msmith</td>
</tr>
</tbody>
</table>
Conditional Formats

You may want to format certain boxes based on one or more data fields contained within those boxes. For example, full-time employees might have a different box border color than contract employees. Conditional formats are used to format boxes based on a set of criteria. When defining which fields to make available in your data sources, you should consider adding additional field to make sure that all your conditional formatting requirements are satisfied.

Automatic Detection of Co-managers

OrgPlus Enterprise can automatically detect co-managers in your source data.

In the following example, Jim Jackson and Blain Gordon are co-managers of Josh Nichols, Adrian Knight, and Jason Wilkoff.

<table>
<thead>
<tr>
<th>Position</th>
<th>ReportsTo</th>
<th>Name</th>
<th>Title</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Jim Stein</td>
<td>President &amp; CEO</td>
<td>5011</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Jim Jackson</td>
<td>VP, Development</td>
<td>5022</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Blain Gordon</td>
<td>VP Marketing</td>
<td>5023</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>Josh Nichols</td>
<td>Sr. Developer</td>
<td>5024</td>
</tr>
<tr>
<td>5</td>
<td>3</td>
<td>Adrian Knight</td>
<td>Senior Tech Writer</td>
<td>5040</td>
</tr>
<tr>
<td>6</td>
<td>3</td>
<td>Jason Wilkoff</td>
<td>Director of P.R.</td>
<td>5040</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>Josh Nichols</td>
<td>Sr. Developer</td>
<td>5024</td>
</tr>
<tr>
<td>5</td>
<td>4</td>
<td>Adrian Knight</td>
<td>Senior Tech Writer</td>
<td>5040</td>
</tr>
<tr>
<td>6</td>
<td>4</td>
<td>Jason Wilkoff</td>
<td>Director of P.R.</td>
<td>5040</td>
</tr>
</tbody>
</table>

If you enable automatic detection of co-managers the following chart results:
Chapter 5

OrgPlus Enterprise Setup

In this chapter...

Overview page 5-1
Getting Started page 5-2
Security page 5-2
Managing Domains page 5-2
Data Sources page 5-6
Fields page 5-9
Views page 5-16
OrgTree page 5-16
Search Results page 5-17
Refresh page 5-19
Options page 5-21
Preferences Page 5-23

Overview

This chapter describes how to set up OrgPlus Enterprise. You may need to work with your IT department to create or configure data sources as needed by your business.

Note: The OrgPlus Enterprise installation process installs a sample database on your server. Visit the OrgPlus Enterprise Knowledge Base at www.orgplus.com/support to find an article describing how to connect OrgPlus Enterprise to the sample database.
Getting Started

Before you can create a domain, you must sign in to the OrgPlus Enterprise Administrative Interface using the root account. Later, after other administrative accounts have been created, you can use these accounts to manage OrgPlus Enterprise.

➢ To access the OrgPlus Enterprise Administrative Interface:

1. Launch Internet Explorer.
2. Enter the Administrator URL (see Chapter 3, OrgPlus Enterprise Installation) in the Internet Explorer Address Bar and click the Go button to display the OrgPlus Enterprise Sign In page.
3. Type root into the User Name field.
4. Type the root password into the Password field.
   Note: The default password is root. This password may have been changed during the installation process.
5. Click the Sign In button to display the OrgPlus Enterprise Home page.
6. Click Admin to display the OrgPlus Enterprise Admin page.

Security

During installation, OrgPlus Enterprise sets security to Internal Security. Internal Security requires that end users enter a user name and password to access charts and directories. Security can be turned off or configured to authenticate users against an external security system. See Chapter 7, Security for more information on how to configure OrgPlus Enterprise security.

Managing Domains

One or more charts can be defined within a domain. A domain contains all the information necessary to create charts and directories. For example, a domain contains all the connection information for a data source such as SQL Server.

Before you can create charts you must create at least one domain.
Note: You can merge multiple domains into a single domain if needed. This is useful if your hierarchy is not stored in a single system (i.e. Full Time employees are stored in one system and part time employees in another). See Merging Domains in Chapter 7 for more information.

➢ To create a domain:

1. In the OrgPlus Enterprise Admin Explorer, click Domains to display the Domains page.

2. Click the Add… button to display the Add Domain panel.

   ![Domain creation panel](image)

Note: If the new domain does not contain sensitive information, check the Add to all roles checkbox to grant access permission to all users. See Chapter 7, Security for more information on role management. The Dynamic checkbox is discussed later in this chapter. The Locked checkbox indicates that the domain is locked by the system and cannot be modified. Domains are locked during data refresh.

3. Enter a domain name in the Name field and click OK. OrgPlus Enterprise adds the new domain to the list of domains in the Domains page.

   ![Domains table](image)

Note: Click any domain name to edit domain properties.

Note: You can enable/disable a domain by using the Enabled checkbox. Disabled domains are not accessible by end users.
➢ **To copy a domain:**

1. In the *OrgPlus Enterprise Admin Explorer*, click **Domains** to display the *Domains* page.
2. Click the **Copy...** button to display the **Copy Domain** panel.

   ![Copy Domain Panel]

3. Select the domain you want to copy, enter a new domain name and click **OK**. The *Domains* page displays your new domain in the list of domains.

➢ **To rename a domain:**

1. In the *OrgPlus Enterprise Admin Explorer*, click **Domains**. The *Domains* page is displayed.
2. Click a domain name. The **Edit** panel is displayed.
3. Update the domain name and click **OK**. The domain is renamed.

➢ **To delete a domain:**

1. In the *OrgPlus Enterprise Admin Explorer*, click **Domains** to display the *Domains* page.
2. Select the **Delete** checkbox(s) associated with the domain(s) you want to delete.
3. When prompted, click **OK** to confirm the deletion. The domain is deleted.

   **Note:** If you have created a large number of domains, you can page through the domains using the controls at the bottom of the domains list.

   ![Record 1 - 4 of 4]

   **Note:** You can change the order of displayed domains by clicking the **Order...** button.
Domain Configuration

The **Admin Explorer** displays all domains.

<table>
<thead>
<tr>
<th><strong>Admin Explorer</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
</tr>
<tr>
<td>Domains</td>
</tr>
<tr>
<td>AEROSPACE</td>
</tr>
<tr>
<td>AUTOMOTIVE</td>
</tr>
<tr>
<td>SUCESSION PLANNING</td>
</tr>
<tr>
<td>Sample</td>
</tr>
<tr>
<td>Security</td>
</tr>
<tr>
<td>Preferences</td>
</tr>
<tr>
<td>System Tools</td>
</tr>
<tr>
<td>License</td>
</tr>
</tbody>
</table>

For each domain, you can configure multiple parameters. The sections that follow cover configuration of these parameters.
Data Sources

You must associate each domain with a data source (i.e. database table, flat file, or directory service).

To configure a data source for a domain:

1. Select **Domains** from the **OrgPlus Enterprise Admin Explorer** to see all the domains you have created.

   You can expand the selected domain by clicking the plus sign.

2. Select **Data Source** to display the **Data Source** page for the selected domain.

   ![Data Source page](image)

   Define the parameters as follows:

   - **Adapter**: Select the adapter that is used to connect to the source database. The available adapters are Excel, Text File, LDAP, ODBC, OLE DB, OPX, SAP (HR-OCI) and SQL Server.

   **Note**: The parameters vary for each adapter. The parameters described in this chapter are for the SQL Server Adapter. For information on how to configure a specific adapter, please visit the OrgPlus Enterprise Knowledge Base at [www.orgplus.com/support](http://www.orgplus.com/support).
• **No hierarchy**: OrgPlus Enterprise supports data sources that do not contain hierarchy information. These data sources can be searched using the directory module. This option is useful for making lists (conference rooms, job codes, building locations) available to end users.

• **Preserve orphans**: Often data sources contain orphan records (records with missing or invalid Position or "Reports To" information). Preserving orphans allows end users to search and chart orphan records and branches (Islands). Islands are branches that are not connected to the main hierarchy. This option is useful for initial data validation of the hierarchy information stored in your HR (or other) system.

• **Server Name**: Type the host name of the database server. You can type *(local)* if the database server is located on the same machine as OrgPlus Enterprise.

• **Database Name**: Type the name of the database in which the source table is located.

• **Table/View Name**: Type the name of the database table or view in which the source data is located.

• **(Optional) Advanced checkbox**: Select this checkbox to define a complex query such as "select * from employees where Org_Unit = 'Engineering'". Complex queries allow you to join multiple tables/views or to retrieve a subset of the data contained in your source table or view.

• **User Name**: Type the database user name. This user name is used to authenticate against the database server so that OrgPlus Enterprise can access the source data.

• **Password**: Type the password that corresponds to the supplied database user name.

• **Authentication Type**: Select **Secure Sockets Layer** if you plan to use a secure connection to SQL Server.

• **Position column**: Type the name of the database column that contains Position information.*

• **Reports To column**: Type the name of the database column that contains Reports To information.*

• **Assistant column**: Type the name of the database column that contains IsAssistant information.*

• **Duplicate record key column**: Type the name of the database column that contains the key used to uniquely identify each record.*

*See Chapter 4, *Source Data Requirements* for details on required and optional fields within your source data.

4 Click **Update** to save the Data Source parameters.
Note: The charts and directories contained within the domain will not be updated until the next manual or scheduled refresh occurs. Clicking the Retrieve and Update button will refresh all associated charts and directories in addition to saving the updated data source parameters.

Note: Integration with Kronos Workforce Central uses the SQL Server adapter. Please visit the OrgPlus Enterprise Knowledge Base at www.orgplus.com/support for more information on integrating OrgPlus Enterprise with Kronos.

Testing Data Sources

You can verify that a connection can be established by clicking the Test Connection button. Testing the connection does NOT perform a query against the underlying data source.

You can also verify that data can be successfully queried (and a hierarchy successfully built) by clicking the Test Data Retrieval button, which will connect to the data source, query the data source and build a hierarchy from the query results.

Note: Click the View Log... link to view the test results.

Warning: Certain data source queries can be lengthy. Test Data Retrieval may take some time.

Warning: Certain data source queries may impact the performance of the system against which a query is being performed. Make sure other critical transactions are not in progress before selecting the Test Data Retrieval option.

Merging Domains

OrgPlus Enterprise allows you to combine hierarchies from different data sources to create a unified organizational chart.

Note: OrgPlus Enterprise version 3.0 supports merging data from ODBC data sources only. Future versions will support additional data source adapters.

➢ To merge two or more domains:

1. Create two or more domains (You must use the ODBC Adapter). See the Managing Domains section in this chapter for more information on creating domains. Each created domain must have exactly the same structure (i.e. common field names).

2. Select Domains from the OrgPlus Enterprise Admin Explorer. All the domains that have been created are listed in the tree under Domains.

   You can expand the selected domain by clicking the plus sign.

3. Select the first Data Source that you want to merge.
4 Select the **Export to Text File** checkbox and specify an export path including an export file name. The path typically references an existing directory on the OrgPlus Enterprise server.

5 Click **Retrieve Data** to make a text file extract for the domain.

6 Repeat the previous three steps for all other domains that you want to merge. The same path should be used for each data source. The Export file name of each data source must be unique.

7 You can now use a text file data source to merge the text files extracted from each domain. Create a final domain that uses the text file data source adapter. Make sure the **Read File from Server** radio button is selected.

8 Enter the file path for each extracted text file into the **Text File Path** text entry. File paths should be separated by asterisks (*).

9 Enter the Position Column and Reports To Column parameters into the Data Source panel. Optionally you can specify assistant and dotted-line columns.

10 Click **Retrieve Data** to make a text file extract for the domain.

11 Use the **Refresh Data** panel to schedule update for both the ODBC domains.

12 Use the **Refresh Data** panel to schedule update for the merged domain.

**Note:** Make sure that the merged domain data refresh is scheduled at least 5 minutes later than the underlying domains to insure that the end users will see the latest organizational information.

### Fields

After you have successfully configured a data source, you can choose which fields you want to include or exclude from your charts and directories. You can also rename fields so that the field name displayed in OrgPlus Enterprise is more user friendly (for example, `e_id` can be renamed to `employee_id`).

By default, all fields are included. Depending on the field type (text, formula, picture, etc), you can set additional advanced options if needed.

**To exclude or include fields:**

1 Select **Domains** from the **OrgPlus Enterprise Admin Explorer**. All the current domains are listed in the tree under **Domains**. You can expand the selected domain by clicking the plus (+) sign.

2 Select **Fields** to display the **Fields** list for the selected domain.

3 Use the **Included** checkbox to include or exclude fields.

4 Click the **Update** button when finished.
**Note:** If you are using the OrgPlus Enterprise URL interface, any field that is used in a URL (i.e. display a directory containing all employees with a DOB > 1970) must have the corresponding URL checkbox selected. This ensures that anyone using the URL interface cannot perform unauthorized requests.

➢ **To rename a field:**

1. Select **Domains** from the **OrgPlus Enterprise Admin Explorer**.
   All the domains that have been created are listed in the tree under **Domains**. You can expand the selected domain by clicking the plus (+) sign.

2. Select **Fields**. The **Fields** list for the selected domain is displayed.

3. Click the **Display Name** column to display the **Edit Field** panel.

4. Type a **Display Name** for the field.

5. Click **OK**.

➢ **To set field properties:**

1. Select **Domains** from the **OrgPlus Enterprise Admin Explorer**.
   All current domains are listed in the tree under **Domains**.

2. Select **Fields** to display the **Fields** list for the selected domain.

3. Click the **Display Name** column to edit a field. The **Edit Field** panel is displayed.

4. Select the **Remove Trailing Spaces** checkbox to strip trailing spaces from the selected field.

5. You can use the **Hyperlink** checkbox to set a field as hyperlinked. By default, OrgPlus Enterprise will automatically determine if a field is hyperlinked based on the format (See **Hyperlinks** in Chapter 4).

6. You can control the target of a hyperlink (New Window, Current Window, Current Frame, Parent Frame, Chart Command) for any hyperlinked field. This is useful when integrating OrgPlus Enterprise into a web portal.

   **Note:** The Chart Command option allows you to call OrgPlus Enterprise when a user clicks a field. For example, a box might contain a link called **My Team**. Clicking the **My Team** link opens a directory window showing all the employees on that employee's team. For more information on Chart Commands please visit the OrgPlus Enterprise Knowledge Base at [www.orgplus.com/support](http://www.orgplus.com/support).

7. Click **OK**
Mapped Fields

Mapped fields allow you to convert one set of field values to another set of field values.

For example, you can map a location string (USA, France) to a picture of a country flag and then display that flag in your chart boxes.

<table>
<thead>
<tr>
<th>Location</th>
<th>CountryFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td><a href="http://www.abc.com/flags/usa.gif">http://www.abc.com/flags/usa.gif</a></td>
</tr>
<tr>
<td>France</td>
<td><a href="http://www.abc.com/flags/france.gif">http://www.abc.com/flags/france.gif</a></td>
</tr>
<tr>
<td>Germany</td>
<td><a href="http://www.abc.com/flags/germany.gif">http://www.abc.com/flags/germany.gif</a></td>
</tr>
</tbody>
</table>

➢ To create a mapped field:

1. Select **Domains** from the **OrgPlus Enterprise Admin Explorer**. All current domains are listed in the tree under **Domains**.
2. Select **Fields** to display the **Fields** list for the selected domain.
3. Click the **Add Mapped...** button.
Define the parameters as follows:

- **Field Name**: Type name of new field.
- **Display Name**: Type display name of new field.
- **Hyperlink**: Select this checkbox to make the field a hyperlink.
- **Hyperlink target**: Select the target (New Window, Current Window, Current Frame, Parent Frame, Chart Command) when the user clicks on the hyperlink.
- **Map From**: Select the field from which the mapped field values will be derived.

To define values for the mapped field:

1. Click the **Define Mapping...** button to display the **Define Mapping** screen.
2. Click the **Add...** button on the **Define Mapping** screen to define a value for the mapped field.
3. Enter a value for the mapped field into the **Value** text entry field.
4. Enter the path of the file to which this value will map into the **Maps to** text entry field.
5 If the value you are defining is the default for this mapped field, check the Default checkbox.

6 To eliminate white space at the end of your value, check the Remove trailing spaces checkbox.

7 Click OK.

8 Repeat steps 2 through 7 of this procedure for each value you want to map for the field.

   **Note:** You can download your mapped field values to an Excel spreadsheet by clicking the **Open in Excel** link.

   **Note:** To upload your mapped field values to an existing Excel spreadsheet, click the Upload... button.

9 Click OK.

---

**Merged Fields**

Merged fields allow you to combine one or more fields into a composite field.

For example, you can combine last name and first name fields into a single field (**Full Name**).

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Full Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chris</td>
<td>Philips</td>
<td>Chris Philips</td>
</tr>
<tr>
<td>Lynn</td>
<td>Brewer</td>
<td>Lynn Brewer</td>
</tr>
<tr>
<td>Larry</td>
<td>Stevens</td>
<td>Larry Stevens</td>
</tr>
</tbody>
</table>

**➢ To create a merged field:**

1 Select Domains from the OrgPlus Enterprise Admin Explorer. All the domains that have been created are listed in the tree under Domains.

2 Select Fields to display the Fields list for the selected domain.

3 Click the Add Merged... button.
4 Define the parameters as follows:
   - **Field Name**: Type name of new field.
   - **Display Name**: Type display name of new field.
   - **Hyperlink**: Use this checkbox to make the field a hyperlink. Use the **Hyperlink target** drop-down list to set the target (New Window, Current Window, Current Frame, Parent Frame, Chart Command) when the user clicks the hyperlink.
   - **Prefix**: Text to place at the start of the merged field.
   - **Postfix**: Text to append to the end of the merged field.

5 Add field/delimiter pairs as needed.

6 Click the **Update** button to preview the merged field.

7 Click **OK**.

**Using Merged Fields to Manage Employee Photos**

Merged fields can also be used to create hyperlinks. In the following example, a directory of employee photos is referenced using a merged field (**Photo**).

The **Photo** field is created by combining a prefix (http://www.abc.com/photos/), Last Name, EmployeeID, and a postfix (.jpg).
Fields and User IDs

If you are planning to implement security, you must create User Accounts for each user who needs secure access to OrgPlus Enterprise (for more information on creating user names, see Chapter 6, Security). OrgPlus Enterprise supports field level security. Field level security enables you to display or hide fields within each box based on the identity of the current user. In order to link a user to a data source, you must select a Chart User ID field for each data source. This field is used to map the current user to a specific box in a chart.

➢ To select the Chart User ID Mapping Field:

1. Select Domains from the OrgPlus Enterprise Admin Explorer. All current domains are listed in the tree under Domains. You can expand the selected domain by clicking the plus sign.
2. Select Fields. The Fields list for the selected domain is displayed.
3. Click the Settings... button.
4. Select the field to be used for mapping Chart User IDs to boxes.
5. Click the OK button.

Bookmark Names

When users create bookmarks, OrgPlus Enterprise names them based on the field chosen for default bookmark names.

➢ To select the default bookmark name field:

1. Select Domains from the OrgPlus Enterprise Admin Explorer. All current domains are listed in the tree under Domains. You can expand the selected domain by clicking the plus sign.
2. Select Fields to display the Fields list for the selected domain.
3. Click the Settings... button.
Select the field to be used for default bookmark names.

4

<table>
<thead>
<tr>
<th>Chart user ID</th>
<th>Employee_ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bookmark name</td>
<td>Last Name</td>
</tr>
</tbody>
</table>

5 Click OK.

Views

Views are used to determine how charts are displayed in OrgPlus Enterprise. See Chapter 6, Managing Views for more information.

OrgTree

The OrgTree enables you explore your organization using a hierarchical tree. Typically the tree is created using a department (or org unit) information.

You can also create a filtered OrgTree called myTree. myTree can be customized for each user. For example, an HR specialist’s myTree might display only the branches of the organization for which she is responsible.

➢ To configure the OrgTree for a domain:

1 Select Domains from the OrgPlus Enterprise Admin Explorer.
   All current domains are listed in the tree under Domains. You can expand the selected domain by clicking the plus sign.

2 Select OrgTree to display the OrgTree page for the selected domain.
3 Make sure that the **Build OrgTree** checkbox is selected.
4 Select the field that is used to designate the org unit breaks from the **Break On** drop-down list.
5 Select the initial number of levels to include in the OrgTree using the **Initial number of levels:** drop-down list.
6 Set the maximum number of levels that can be displayed in the OrgTree using the **Maximum number of levels:** drop-down list.
7 Select the three fields to display in the Org Tree using the **Display Fields** drop-down lists. Leave the second and third drop-down lists blank to display only one field in the Org Tree.
8 Optionally, you can also create a filtered version of the OrgTree called **myTree**. Select the **Build myTree** checkbox then select a filter. You must have at least one filter defined to enable the myTree functionality. See **Filter Based Security** in Chapter 7, **Security** for more information on filter definition.
9 Click the **Update** button.
10 Click the **OrgTree** tab to view the organization’s OrgTree.

**Note:** **myTree** is accessed using the **Explore** tab in the Chart module.

## Search Results

OrgPlus Enterprise enables you to search a corporate directory and to search for a specific record within a chart using the **Explore** panel. See the OrgPlus Enterprise **User Guide** for more details. For each domain, you can select which fields are to be shown in the results list whenever a search is performed.

**To configure search results:**

1 Select **Domains** from the OrgPlus Enterprise Admin Explorer. All current domains are listed in the tree under **Domains**. You can expand the selected domain by clicking the plus sign.
2 Select **Search Results** to display the **Search Results** page for the selected domain.
3 Select **Edit Directory Fields** or **Edit Explore Fields**.

- Select **Edit Directory Fields** to specify which field is displayed when searching a corporate directory.
• Select **Edit Explore Fields** to specify which field is displayed when searching a chart using the **Explore** panel.

4. Add fields to display by selecting a field from the **Available Fields** list and then clicking the **Add >** button. You can remove fields from the **Show Fields** list by selecting a field and then clicking the < **Remove** button. Use the **Add All** button or the **Remove All** button to add or remove all fields.

5. Reorder the fields if desired using the **Move Up** or **Move Down** buttons.

**Note:** Use the **Default Sort Order** drop-down list to set the initial sort.

6. Click the **Update** button. The search results fields are updated.

**Refresh Data**

OrgPlus Enterprise enables you to specify how often data from a source database is refreshed. Refreshing your data synchronizes OrgPlus with the underlying data source, such as a Human Resources system. Before configuring data refresh, you should consider the most appropriate refresh schedule based on your business needs. The default setting is a manual refresh. You may want to refresh your data every three hours or, if you have a large number of records in your database, you may want to perform data refresh less often.

**To configure data refresh:**

1. Select **Domains** from the **OrgPlus Enterprise Admin Explorer**.
All current domains are listed in the tree under **Domains**. You can expand the selected domain by clicking the plus sign.

2 **Select Refresh Data** to display the Refresh Data screen.

3 Choose how you want data refresh to occur:
   - **Manual**: Do not refresh data automatically.
   - **Daily At**: Specify a time of day to refresh data.
   - **Weekly**: Specify a weekly schedule for data refresh.
   - **Every**: Specify a time interval for data refresh.
   - **Automatic**: Automatically refresh data whenever the data changes. This automatic option is available only for flat file data sources (Text File or Excel). The file must reside on the OrgPlus Enterprise Server or be read from a volume accessible to the OrgPlus Enterprise Server.
   - **Refresh data on process restart**: Specify whether to automatically refresh data for this domain each time the OrgPlus Enterprise process is restarted.

4 Click the **Update** button to confirm your Refresh Data options.

**Note**: You can manually refresh data at any time by clicking the **Refresh Data Now** button.

**Note**: The time and date of the next scheduled data refresh appears at the top of this page.

**Data Source Changes**

If a field within a data source is renamed, OrgPlus will not be able to refresh that field’s data within a domain. Instead OrgPlus posts a warning to the Refresh Log (See **Fields**, page 5-9 for more information).
Options

OrgPlus Enterprise enables you to configure a number of options for each domain.

➢ In this section...

  Charting Options  Page 5-21
  Limiting Access to Features and Panels  Page 5-22

Charting Options

OrgPlus Enterprise enables you to configure the initial display settings for each chart within a domain.

➢ To configure default charting options for a domain:

  1 Select Domains from the OrgPlus Enterprise Admin Explorer to display all current domains.
  2 Click the plus sign to expand a domain.
  3 Select Options in the domain you selected to display the Options page of that domain.
  4 Select the Chart tab.

| Initial number of levels to chart | 3 |
| Maximum number of levels to chart | 7 |
| Default zoom level | 75% |
| Initial Chain of Command | Off |

Update
5 Define the default charting parameters as follows:

- **Initial number of levels to chart**: Enter the number of levels to display when a chart is first shown. Typically two or three levels is initially shown.

- **Maximum number of levels to chart**: Enter the maximum number of levels that can be charted on a single page. Typically five levels is the maximum number of levels. Enabling a user to chart a large number of levels may result in slow performance, especially if a low bandwidth internet connection is used.

- **Default zoom level**: Select the initial zoom level that is to be used when a chart is first displayed.

- **Chain of Command**: Select whether chain of command is initially turned on or off.

6 Click the **Update** button.

### Limiting Access to Features and Panels

If your system is configured for Open Access (no user name and password required), you may want to disable printing and other data export functions.

- **To limit access to features and panels:**
  1. Select **Domains** from the OrgPlus Enterprise Admin Explorer to display all current domains. You can expand the selected domain by clicking the plus sign.
  2. Select **Options** to display the Options page for the selected domain.
  3. Select the **Features** tab.
4 Define the parameters as follows:

- **Enable Print**: If selected, users can print charts.
- **Enable Save**: If selected, users can save charts to their computer for viewing or editing with the OrgPlus desktop software (or Enterprise Modeler).
- **Enable Send to Excel**: If selected, users can export data to Microsoft Excel.
- **Enable Send to PDF**: If selected, users can export data to PDF.
- **Enable Send to PPT**: If selected, users can export data to Microsoft PowerPoint.
- **Enable Send to Modeler**: If selected, users can launch the OrgPlus Enterprise Modeler.
- **Enable Add Bookmarks**: If selected, users can add bookmarks.
- **Bookmarks**: If selected, users can access the Bookmarks panel.
- **Explore**: If selected, users can access the Explore panel.
- **Profile**: If selected, users can access the Profile panel.
- **Index**: If selected, users can access the Index panel.

5 Click the **Update** button.

### Preferences

OrgPlus Enterprise allows administrators to customize many elements within the user interface.

- **In this section...**

  - **Presentation**  
  - **Download Link**  
  - **Modeler Path**  
  - **Languages**  
  - **Themes**  
  - **Custom Strings**  
  - **Branding**

### Presentation

A number of presentation elements such as sub-chart arrow style and box selection color can be customized. You can also select the rendering technology used to draw charts.
Chart Rendering

OrgPlus Enterprise supports rendering charts using VML (Vector Markup Language) or SVG (Scalable Vector Graphics). Some browsers require you to install an Active-X plug-in to support SVG. Adobe provides a free SVG plug-in for a number of platforms at www.adobe.com/svg/main.html. SVG rendering is faster and higher quality than VML rendering.

Note: One of the SVG options must be enabled for Safari and FireFox users to access OrgPlus Enterprise.

➢ To set the rendering technology:

1. Select Preferences | Presentation from the OrgPlus Enterprise Admin Explorer.

2. Select the Chart Rendering tab.

3. Select from the rendering options:
   • VML only: Render all charts using VML.
   • SVG only: Render all charts using SVG.
   • SVG for supported browsers: Render chart using SVG if SVG is supported; otherwise use VML.

4. Click the Update button.
Sub-chart Arrows

A number of sub-chart arrow styles are available.

>To set the sub-chart arrow style:

1. Select Preferences | Presentation in the OrgPlus Enterprise Admin Explorer.
2. Select the Sub-chart arrows tab.
3. Select a sub-chart arrow style from the drop-down list. After selecting a sub-chart arrow style a preview of that style is displayed beneath the drop-down list.
4. Optionally, you can specify a fill color and border color for all sub-chart arrows. Uncheck the Use Box Colors checkbox to specify sub-chart arrow color settings.
5. Click the Update button.
Selection Box Color

You can change the color used to highlight the selected box.

To change selection color:

1. Select Preferences | Presentation from the OrgPlus Enterprise Admin Explorer.
2. Select the Selection Box tab.
3. Select a color from the drop-down list.
4. Click the Update button.

Missing Pictures

Often employee pictures are missing in the underlying data source. OrgPlus Enterprise allows you to specify the image to use when a picture for an employee cannot be found.
To change the download link:

1. Select Preferences | Presentation from the OrgPlus Enterprise Admin Explorer.
2. Select the Missing Pictures tab.
3. Select a default image (Image 1 or Image 2) or upload a custom image using the Browse... button.
4. Click the Update button.

Download Link

By default, the download OrgPlus Desktop link in the Save as OPX dialog directs the user to download an evaluation copy of OrgPlus Desktop from the HumanConcepts website. This link can be changed to point to any web page (such as a corporate employee portal).

To change the download link:

1. Select Preferences | Download Link from the OrgPlus Enterprise Admin Explorer to display the Download Link page.
2. Ensure that the Enable Link checkbox is selected.
3. Enter the message to be displayed in the Save as OPX dialog (for example, Download OrgPlus Standard) in the Download Text field.
4. Enter the link (for example, http://www.orgplus.com/products/download.htm) in the Link field.
5. Click the Update button.

Note: Click the Reset button to point the download link back to the HumanConcepts web site.

Modeler Path

By default, the Enterprise Modeler ActiveX plug-in will automatically be installed on the end user’s browser the first time it is used on a computer. By default the Modeler Plug-in is downloaded from a HumanConcepts’ server.

Using this option you can configure the Modeler download link to point to another server within your network. This option is desirable for secure networks where end users cannot access servers outside of the corporate firewall. Visit the OrgPlus Enterprise Knowledge Base at www.orgplus.com/support to find an article that details OrgPlus Enterprise Modeler installation options.
Languages

You can specify the languages available to end users. OrgPlus Enterprise remembers the language selection for each user.

➢ To configure the default language:

1. Select Preferences | Languages from the OrgPlus Enterprise Admin Explorer to display the Languages panel.

2. In the Default column, select the default language. This is the language that is selected when a user logs onto OrgPlus Enterprise for the first time.

3. Click the Update button.

➢ To configure which languages are available to end users:

1. Select Preferences | Languages from the OrgPlus Enterprise Admin Explorer to display the Languages panel

2. In the Enabled column, select the languages that you want enabled for the user.

3. Click the Update button.

Themes

You can specify the color theme to be used within OrgPlus Enterprise.

➢ To change the theme:

1. Select Preferences | Themes from the OrgPlus Enterprise Admin Explorer to display the Themes panel.

2. In the Default column, select the default theme. This is the theme that is used when a user logs onto OrgPlus Enterprise.
3 Click the **Update** button.

**Note:** You can add custom themes by clicking the **Add...** button. Each theme has a name, ID and color associated with it. The ID is used if the theme is specified through the URL interface. Visit the OrgPlus Enterprise Knowledge Base at www.orgplus.com/support for more information on the URL interface.

### Custom Strings

All strings used within OrgPlus Enterprise are customizable (for example, you can replace the term “Chart” with “Org Chart.”) Visit the OrgPlus Enterprise Knowledge Base at www.orgplus.com/support for more information on custom strings.

### Branding

You can customize OrgPlus Enterprise to show your corporate logo.

**Small Logo**

The optimal size for a small logo is 120X24 pixels (the small logo is displayed in the upper right corner).

**To include a small logo:**

1. Select **Preferences | Branding** from the OrgPlus Enterprise Admin Explorer.
2. Select the **Enable Small Logo** checkbox.
3. Use the **Browse...** button to upload a logo.
4. Click the **Update** button.

**Large Logo**

The optimal size for a large logo is 200X40 pixels. The large logo is displayed in the sign in and module selection pages.

**To include a large logo:**

1. Select **Preferences | Branding** from the OrgPlus Enterprise Admin Explorer.
2. Select the **Enable Large Logo** checkbox.
3. Use the **Browse...** button to upload a logo.
4. Select **Scale to Fit** to allow OrgPlus Enterprise to scale your logo when inserting it into various OrgPlus Enterprise screens.
5. Optionally, you can change the text associated with the large logo. The default text is “Organizational charts for:”
6 Click the Update button.

OrgPlus Logo

Optionally you can choose to hide the OrgPlus Logo from end users. This is useful when OrgPlus Enterprise is integrated into another web application or corporate portal.

➢ To hide the OrgPlus Logo:

1 Select Preferences | Branding from the OrgPlus Enterprise Admin Explorer.

2 Select the Hide OrgPlus Logo checkbox.

3 Click the Update button.
Chapter 6

Managing Views

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Overview

This chapter describes how to create and edit charts in OrgPlus Enterprise. Before you can create a chart view, you must setup and configure one or more domains. See Chapter 5, OrgPlus Enterprise Setup for more information on domain creation.
Managing Views

Views determine how charts are displayed in OrgPlus Enterprise. A view contains all the formatting parameters used to render a chart. You can create multiple views within each domain. You can use each view to satisfy different end user requirements. For example, you can create views for retirement planning, salary rollup, and headcount analysis within a single domain.

You can create views either by using a blank template or by uploading a template. You can create and edit templates using either OrgPlus desktop software or OrgPlus Enterprise Modeler.

Note: You can modify some view properties in OrgPlus Enterprise; however, you must have OrgPlus desktop software or the OrgPlus Enterprise Modeler installed on your computer to create and edit view templates.

To create a new view:

1. Select Domains from the OrgPlus Enterprise Admin Explorer. All domains are listed in the tree under Domains. You can expand a selected domain by clicking the plus sign.

2. Select Views to display the Views page for the selected domain.

Note: You can change the view order by clicking the Order... button.
3 Click the **Add...** button to display the *Add View* panel.

4 Type a **View name**.

5 Select the **Blank Template** radio button.

6 Select fields to include in your chart boxes and use the **Add** button to include them.

7 Click **OK**.

**Note:** OrgPlus automatically adds access to a new view to all roles that can access the parent domain unless you uncheck the **Add to all roles** checkbox.
To delete a view:

1. In the OrgPlus Enterprise Admin Explorer, select the Views element within a domain.

- Select the Delete checkbox(s) associated with the views(s) you want to delete.
- Click Delete.
- When prompted, click OK to confirm the deletion.

To rename a view:

1. In the OrgPlus Enterprise Admin Explorer, select the Views element within a domain.

- Click a view name to display the Edit panel.
- Update the view name and click OK.
- Click OK.

To edit a view:

1. In the OrgPlus Enterprise Admin Explorer, expand a domain’s Views list by clicking the plus sign.

- Select a view to display the view’s properties page. See the next section for a discussion of View properties.
- Click Update when finished.
View Properties

Use the tabs of the View Properties panel to modify view properties.

![View Properties Panel]

**Note:** Always remember to click **Update** to save changes before exiting the View Properties panel.

**Template Tab**

To create or update a view you must download a template for editing within OrgPlus desktop software or Enterprise Modeler. Once you have updated the template, you must upload it back to OrgPlus Enterprise. See *Using OrgPlus Desktop to Modify Views*, in this chapter for more information.

OrgPlus Enterprise 3.0 reduces the need for templates by allowing you to control many chart attributes from within the administrative interface. You can configure the following chart options using the templates tab:

- **Automatic Branch Styles** - You can set OrgPlus Enterprise to automatically optimize branch styles. Optimizing branch styles results in better on screen display as well as better printing and publishing. This is especially useful if you have a large number of subordinates reporting to any single manager.

- **Display of Alternate Managers** – You can include a list of alternate (matrix or dotted-line) managers directly in chart boxes or you can display alternate managers in a callout.
• **Multi-record Box Setup** - You can combine all the members of a team into a single box.

**Note:** You can rename a view within the template tab.

➢ **To download a template:**

1. In the **OrgPlus Enterprise Admin Explorer**, expand a domain’s **Views** list by clicking the plus + sign.
2. Select a view. The **View Properties** page is displayed.
3. Select the **Template** tab.
4. Click **Download**.
5. Name the template and click **Save**.
6. Use OrgPlus desktop or Enterprise Modeler software to open the template for editing.

➢ **To upload a template:**

1. In the **OrgPlus Enterprise Admin Explorer**, expand a domain’s **Views** list by clicking the plus + sign.
2. Select a view. The **View Properties** page is displayed.
3. Select the **Template** tab.
4. Click **Browse...**
5. Select a template file. Click **Open**.
6. Click **Upload...**
7. Click **Update**.

➢ **To configure automatic branch styles:**

1. In the **OrgPlus Enterprise Admin Explorer**, expand a domain’s **Views** list by clicking the plus + sign.
2. Select a view. The **View Properties** page is displayed.
3. Select the **Template** tab.
4. Select the **Automatic Branch Styles** checkbox.
5. Choose the default **Branch Style**:
   - **Auto**: Optimizes branch styles to the current page layout.
   - **Wide**: Optimizes branch styles to a landscape layout.
   - **Stagger**: Optimizes branch styles for a portrait layout.
6 Choose the **Assistant Style**. The following assistant styles are available:

![Assistant Styles]

7 Selecting the **Resort peers to optimize space usage** checkbox enhances branch style optimization by resorting boxes. This option overrides any box sorting criteria set in the **Advanced** tab.

8 Click **Update**.

**Note:** If the Automatic Branch Styles checkbox is not selected, the branches styles defined in the template will be used to display the chart.

➢ To configure display of alternate managers:

1 In the **OrgPlus Enterprise Admin Explorer**, expand a domain’s **Views** list by clicking the plus sign.

2 Select a view. The **View Properties** page is displayed.

3 Select the **Template** tab.

4 Select the **Display alternate managers** checkbox and then select one of the following options:

- **As callout**: Displays the duplicates icon inside the box. When move the mouse cursor over the icon, a callout displays the alternate managers to whom the employee reports.

![Callout]

- **As part of box**: Displays the alternate manager information inside the box. You can specify the fields displayed using the **Display field 1** and **Display field 2** drop down lists. Use the **Format...** button to set the appearance.

![Box with Callout]

**Note:** If the checkbox is not selected, any box containing an alternate manager will contain a icon, Clicking this icon will navigate to the next occurrence of the employee represented in the box.

5 Click **Update**.
Note: To include alternate manager information in your charts, you must define the Duplicate record key column for the data source. See Data Sources in Chapter 5 for more information.

➢ To combine records into multi-record boxes:

1 In the OrgPlus Enterprise Admin Explorer, expand a domain’s Views list by clicking the plus sign.
2 Select a view to display the View Properties page.
3 Select the Template tab.
4 Select the Combine... button.
5 Select the Combine records checkbox.
6 From the Combine using drop-down list, select the field that will be used to group records into a multi-record box.
7 Select the Only combine boxes with no subordinates checkbox to limit creation of multi-record boxes to the bottom level of your organizational chart.

Note: If you select this option, you can also set the Include subordinates with no peers checkbox to create multi-record boxes that contain only one record.
8 Optionally, you can use the Criteria checkbox to restrict multi-record box creation to include only boxes that meet specific criteria (i.e. Title = Sales Associate).
9 Click OK.

Note: The box layout used for a multi-record box must be defined in the template. See Chapter 8, Advanced Features for more information on Multi-record boxes.
Fields Tab

Use the **Fields** tab to specify which fields are included in a view. Fields that are not included cannot be used in the chart, indexes, or profiles associated with the view.

Use the **Access** checkbox to include or exclude fields from a view.

For formula fields you can set the **Ignore group** option. This option determines how OrgPlus calculates results for formulas. If you turn this option on, selecting a group does not affect the formula result. See Chapter 8, *Advanced Features* for more information on groups.
Extras Tab

The **Extras** tab allows you to include Groups, Indexes, and Profiles in a view.

### To include or exclude a group:

1. Select **Groups** from the **Extras** list on the left.
   
   See *Defining Groups* in this chapter for more information on group definition.

2. Use the **Add** and **Remove** buttons to include or exclude groups from the current view.

3. Click **Update**.

### To include or exclude an Index:

1. Select **Indexes** from the **Extras** list on the left.
   
   See *Defining Indexes* in this chapter for more information on index definition.

2. Use the **Add** and **Remove** buttons to include or exclude indexes from the current view.

3. Click **Update**.

### To include or exclude a Profile:

1. Select **Profiles** from the **Extras** list on the left.
   
   See *Defining Profiles* in this chapter for more information on profile definition.

2. Use the **Add** and **Remove** buttons to include or exclude profiles from the current view.
3 Click **Update**.

*Note:* Use the **Move Up** and **Move Down** buttons to control the order in which respective profile, index and group lists are shown to the end user.

**Background Tab**

The background tab allows you to define the background for a view. You can select a solid color, a gradient, a picture, or a texture. A preview of the selected background is shown on the right.

**Solid**

To specify a solid color background:

1. Select the **Solid** radio button.
2. Do one of the following to specify your color:
   - Select a color from the **Color** drop down menu.
   - Click the paint bucket icon to define a custom color.
3. Click **Update** to confirm your changes.

*Note:* Use the **Transparent** checkbox to turn your background color off. When the checkbox is checked, the default background is shown.
To specify a two-color gradient background:

1. Select the Gradient radio button.
2. Do one of the following to specify the first color of your gradient:
   - Select a color from the Color1 drop down menu.
   - Click the Color1 paint bucket icon to define a custom color.
3. Do one of the following to specify the second color of your gradient:
   - Select a color from the Color2 drop down menu.
   - Click the Color2 paint bucket icon to define a custom color.
4. Select one of the Shading Styles by clicking either Vertical or Horizontal.
5. Click Update to confirm your changes.
You can select a background picture for a view. You can also select a fill color to appear as a background to a picture that does not fill the view.

To specify a background picture:

1. Select the **Picture** radio button.
2. Do one of the following to specify the background picture:
   - Type the picture’s file path in **Picture Path**.
   - Click the **Browse...** button to browse to the location of the picture file.
   - Optionally, you can specify a fill color by selecting a color from the Fill Color drop-down menu or clicking the paint bucket icon 🎨.
3. Click **Update** to confirm your changes.
To specify a texture background:

1. Select the **Texture** radio button.
2. Do one of the following to specify your texture:
   - Type the file path of a texture image in the **Texture Path** field.
   - Click the **Browse...** button to locate the texture image file.
3. Click **Update** to confirm your changes.
Orientation Tab

The orientation tab has two options:

- **Chart Orientation**: Select how you want the chart to be drawn. The orientation options are top to bottom, bottom to top, left to right, or right to left.
- **Peer Alignment**: Select how subordinate boxes are to be aligned with respect to their manager.

**Note**: The available Peer Alignment options depend on the Chart Orientation you select.

A preview is shown on the right.
The Advanced tab allows you to configure the following options:

- **Sub-chart AutoText Element Field**: If a sub-chart AutoText element is included in your master page, you can define which field is used. Typically, either department or Org Unit is selected.

- **Exclude duplicates from counts and calculations**: Duplicate records (i.e. people who appear more than once in a chart) are excluded from counts and calculations if you check this checkbox.

- **Background settings override theme**: OrgPlus Enterprise supports UI themes. Currently, themes can be set only by using the URL interface. Use the **Background settings override theme** checkbox to set whether the background is determined by the view (background tab) or by the current theme.

- **Do not display hotspot warning**: If the profile associated with a hotspot is not defined, OrgPlus Enterprise will display a warning to the end user. Select this checkbox to hide any hotspot warning messages.

- **Automatically detect co-manager**: If this option is selected, OrgPlus Enterprise will automatically apply the co-manager branch style as needed within your chart. See **Automatic Detection of Co-managers** in Chapter 4.

- **Sort by**: Sort subordinates under each manager using the selected sort fields.
• **Sort type**: Specify whether subordinates are sorted in ascending or descending order for each sort key.

**Master Page Tab**

The Master Page tab allows you to specify elements that will appear on each chart page for the selected view.

• **Include Title** – To include a title on the master page, select this checkbox and enter the title in the text box below.
  - **Alignment** – Select from this drop-down menu to specify the alignment of your title text: **Left**, **Center**, or **Right**.
  - **Format** – To format your title, click the **Format**... button.

• **Include Logo** – To include an image of your logo on the master page, select this checkbox and either enter the path of the logo image in the text box below it or click the **Browse** button to navigate to the logo’s location.
  - **Alignment** – Select from this drop-down menu to specify the alignment of your logo image: **Left**, **Center**, or **Right**.
  - **Scale** – To set the scale for logo image, enter a percentage.
Using OrgPlus Desktop to Modify Views

OrgPlus desktop (Standard and Professional) products are powerful organizational charting applications. Refer to the OrgPlus User Guide for more information on how to use OrgPlus Desktop products.

**Note:** You can also use the OrgPlus Enterprise Modeler (ActiveX Control) to modify views.

OrgPlus Desktop gives you control over many formatting options when creating a view for OrgPlus Enterprise. The options include:

- Selection of chart background (solid color, gradient or texture).
- Selection of branch style for each chart level including assistant styles.
- Format of box border and connecting line style for each level.
- Fields to include in each box at each level (Box Layout).

**Note:** The leftmost box on each level determines which fields, fonts, box styles, line styles and branch styles are to be used in OrgPlus Enterprise.

Chapter 8, *Advanced Features*, describes creating views that use sophisticated features such as conditional formatting, formulas, and groups.

Defining Groups

**Groups** enable you to display a sub-set of a chart that meets a set of criteria that you define. All boxes that do not belong to this sub-set (or group) appear shaded when the group is selected.

The following chart shows full time employees. Contract and part-time employees are grayed.
You can define any number of groups for a specific domain. Use the Extras tab (in View Properties panel) to make a group available within a view.

➢ To create a group:

1. In the Admin Explorer, select the Groups node within a domain to display the Groups Panel.

2. Click the Add… button to display the Add Panel.

3. Name the Group using the Group Name text box.

4. Define the group selection criteria.

5. Define the Display Options for boxes and boxes content:
   - Gray boxes not in group: Grays boxes that do not belong to the group.
   - Hide boxes not in group (preserve hierarchy): Hides boxes that do not belong to the group unless the box is required to maintain the hierarchy of the chart.
   - Hide content if not in group: Hides the content of boxes that do not belong to the group.
   - Gray content if not in group: Grays the content of boxes that do not belong to the group.

6. Click OK.
Note: You can modify any group by clicking a group name. To delete a group, select the Delete checkbox(s) associated with the group(s) you want to delete and click Delete. You can duplicate a group using the Copy… button.

Note: You can upload groups from OrgPlus desktop template by using the Upload… button.

Defining Profiles

Profiles enable you to display additional information for any box, such as a photo or phone numbers.

➢ To create a profile:

1. In the Admin Explorer, select the Profiles node within a domain to display the Profiles Panel.
2. Click Add…
3. Select the Fields tab.
4. Type in a name for the profile into the Profile name text box.
5. Use the Add and Remove buttons to include or exclude fields.
6  Select the **Display** tab to format the profile.

![Display Tab](image)

To format any included field choose from the following options:

- **Show Label**: Include the field label in the profile (For example, Title: Manager Operations).
- **Text Style**: Set the text style for the selected field (Bold, Italic, Underline).
- **Font**: Set the font for the selected field or label.
- **Font Size**: Set the font size for the selected field or label.
- **Font Color**: Set the font color for the selected field or label.
- **Align**: Set justification for the selected field or label.
- **Wrap Text**: Enable text wrapping for the selected field or label.
- **Move up/down**: To reorder fields within the profile.
- **Show Grid**: To display row and column line separators in the profile.
- **Background Color**: Set the background color for the profile.

7  You can rename labels by selecting a label and then retyping the label name.

8  If the profile is going to be used as a hotspot, you can use the **Hotspots** tab to set the border options such as border style and border color.

9  Click **OK**.

**Note:** To delete a profile, select the associated checkbox and then hit the **Delete**... button. To duplicate a profile use the **Copy**... button.

**Note:** The **Upload**... button can be used to create profiles from OrgPlus Desktop templates.
Defining Indexes

An Index is a tabular list of information derived from your chart. You can also use an Index to send an email.

You can define any number of indexes for a specific domain. Use the **Extras** tab (in View Properties panel) to include indexes into a view.

➢ **To create an index:**

1. In the **Admin Explorer**, select the **Indexes** node within a domain to display the **Indexes Panel**.
2. Click **Add**...
3. Select the **Fields** tab.
4. Type in a name for the index in the **Index name** text box.
5. Use the **Add** and **Remove** buttons to include or exclude fields.
6. Select the **Display** tab to format the Index.

To format any included field choose from the following options:

- **Text Style**: Set the text style for the selected field (Bold, Italic, Underline).
- **Font**: Set the font for the selected field or label.
- **Font Size**: Set the font size for the selected field or label.
- **Font Color**: Set the font color for the selected field or label.
- **Align**: Set justification for the selected field or label.
- **Wrap Text**: Enable text wrapping for the selected field or label.
- **Move up/down**: To reorder fields within the index.
- **Show Grid**: To display row and column line separators in the index.
- **Odd/Even row fill color**: Set the background color for odd and even rows in the index.

7. Click **OK**.

**Note**: To delete an index, click its checkbox and then click the **Delete** button. To duplicate an index use the **Copy** button.

**Note**: You can use the **Upload** button to create indexes from OrgPlus Desktop templates.
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Overview

You can configure OrgPlus Enterprise for Open Access, Secure Access, or a combination of both called Hybrid Access.

Hybrid Access enables the majority of end users to access the system using a URL that does not require login while users requiring access to confidential data must log in before using the system.

If you select Secure Access, OrgPlus Enterprise can use internally managed user accounts or call an external security system to authenticate users.

OrgPlus Enterprise has a flexible security architecture. OrgPlus Enterprise is designed to fit into your existing security infrastructure. OrgPlus Enterprise also supports single sign on when called from within a web application or portal.

Authentication

Authentication is the process of determining whether someone is who they are declared to be. If you enable secure access, OrgPlus Enterprise authentication requires entry of a user name and password. OrgPlus Enterprise can either authenticate users against an internally managed set of user accounts or call an external security system. Setting up external security is discussed later in this chapter.

Role-Based Security and Authorization

OrgPlus Enterprise supports role-based security. Each user is assigned a role. A role determines which domains, views, and fields a user can access. Typically, an administrator creates roles according to business needs.

Authorization is the process of determining a user’s role.
Security Setup

Before deploying OrgPlus Enterprise you must determine the method(s) that will be used to **authenticate** and **authorize** users. You can configure security in the following ways:

- **Open Access – No authentication or authorization**
  If authentication is not required, all users are given a default role.

- **Internal Security – Authentication and authorization determined from internally managed user accounts**
  User’s role is determined by the role specified in each OrgPlus Enterprise user account.

- **External Security – Single external system used for authorization and authentication**
  OrgPlus makes a single call to an external security system that both authenticates the user and returns the user’s role. For example, Active Directory might contain an *OrgPlus Enterprise Role* tag for each user account.

- **External Security – Different systems used for authentication and authorization**
  Authorization and Authentication systems are separate. For example, all authentications within an enterprise are performed using Active Directory; however, the role for each user is managed within the HRMS (for example, SAP or PeopleSoft).

- **External Security – External system used for authentication; role determined from underlying data source**
  The role is determined by applying a *role rule* to the data record that corresponds to the current user. A *role rule* is attached to a specific data source and consists of one or more conditions. For example, a field within a data source specifies a user as an HR administrator.

- **External Security – External system used for authentication; shadow user accounts determine role**
  Occasionally, the role for a specific user cannot be determined from a data source (Role determined from underlying data source) or an external security system. In this case, the role for a user can be determined using the role assigned to an OrgPlus Enterprise *shadow* user account. *Shadow* user accounts are discussed later in this chapter.
Administrative Login

Use the Administrative Interface to set up security for OrgPlus Enterprise.

➢ To access the OrgPlus Enterprise Administrative Interface:

1. Launch Internet Explorer.
   Type the Administrator URL (see Chapter 3, Administrative Login) in the Internet Explorer Address Bar and click the Go button to display the OrgPlus Enterprise Sign In page.

2. Type root into the User Name field.

3. Type the root password into the Password field.
   Note: The default password is root. This password may have been changed during the installation process.

4. Click the Sign In button to display the OrgPlus Enterprise Home page.

5. Click Admin to display the OrgPlus Enterprise Admin page.
Configuring Security

Use the administrative interface to configure OrgPlus Enterprise security.

➢ To configure security:

1. Log in to the Administrative Interface (see Administrative Login, page 7-4).
2. In the OrgPlus Enterprise Admin tree, click Security | Access to display the Security Settings page.
3. Select an access mode. The access mode determines how OrgPlus will authenticate and authorize users.
   - **Open Access**: No login required.
     
     **Note**: If you select Open Access, you can access the Administrative Interface by entering the Administrative Login URL in the address bar of your browser.
   - **Internal Security**: All user accounts are managed within OrgPlus Enterprise.
   - **External Security**: User accounts are authorized and authenticated using an external system.

   If you select External Security, configure Stand Alone security by selecting Authentication and Authorization methods. Use the button to enter setup parameters as necessary.

     **Note**: See Single Sign On, page 7-29.
   - **Note**: See Using Excel for Authentication and Authorization, page 7-10 for an example of how to set up OrgPlus External Security.
• **Enable internal accounts**, OrgPlus Enterprise first authorizes user names and password against the internal user accounts; if authorization fails, OrgPlus Enterprise authorizes against the selected external security system.

• **Enable forgot password link**, OrgPlus Enterprise displays a Forgot Password link on the Sign In page. The forgot password link works only with Internal Security or External Security using the Excel Stand Alone Authentication.

• **Enable case-insensitive authorization**, When determining the role of a user, OrgPlus ignores case mismatches.

4 Click the **Update** button.

### Internal Security

If you configure OrgPlus Enterprise for internal security, you must create a user account for each user requiring secure access.

**Note:** See *Hybrid Security*, page 7-13 for more information on how to setup a single account for general access.

When a user logs into OrgPlus Enterprise, the user name and password are authenticated against all active internal user accounts. Each user account contains a role assignment.

### Internal User Accounts

Log on to the Administrative Interface (see *Administrative Login*, page 7-4) to add, modify, or delete internal user accounts.

➢ **To add a user account**

1 In the **OrgPlus Enterprise Admin Explorer**, click **Security | Users** to display the **User Management** page.

2 Click the **Add...** button to display the **Add User** panel.
3 Enter all required information for the new user account:
   - **User Name**: Enter the user name that will be used to log in to OrgPlus Enterprise.
   - **E-mail**: Enter the email address for the user.
   - **Full Name**: Enter the full name for the user.
   - **Description**: Enter any pertinent additional information about the user.
   - **Password/Confirm Password**: Enter the password to be used during login.
   - **Prompt user to change password**: Select this checkbox to force the user to change the initial password.
   - **Role**: Select a role for the user (see Role Management, page 7-14).
   - **Type**: Select **Internal**.
   - **Administrator**: Select whether the user has access to the administrator interface.
   - **Active**: Select whether the user account is active or inactive. Inactive accounts cannot log on to OrgPlus Enterprise.

4 Click **OK** to add the user to the **User Management** page.

➢ **To search for a user account:**
   1 In the **OrgPlus Enterprise Admin Explorer**, click **Security | Users** to display the **User Management** page.
   2 From the **Search** drop-down list to select the search field.
3 Enter the search criteria.
4 Click **Search** to display a list of users matching the search criteria.

➢ **To delete a user account:**
1 Perform a search (as described in the previous procedure) for the user you want to delete.
2 Click the **Delete** link associated with the user. You are prompted to confirm the deletion.
3 Click **OK**. The user is deleted.

➢ **To modify a user account:**
1 Perform a search (as described in the previous procedure) for the user whose details you want to modify.
2 Click the **Edit** link in the user record to display the **Edit User** panel.

![User Details](image)

3 Modify the user details as desired.
4 Click **OK** to save the modified details.

**Note:** You also use the **Edit User** panel to grant rights to another user’s security (see **Single Sign On**, page 7-29). In addition, the Edit User panel also enables the administrator to set the Chart User ID for a user account (see **Field-level Security**, page 7-24).

➢ **To reset a user password:**
1 Perform a search (as described in the previous procedure) for the user whose password you want to reset.
2 Click a **User Name**.
3 Click the **Reset Password...** button.
4 Type in a new password and password confirmation. Click OK.

**Note:** Optionally, you can select the **Prompt user to change password** checkbox. If you select this option, the user will be prompted to define a new password the next time they log into OrgPlus Enterprise.

## External Security

If OrgPlus Enterprise is configured for external security, user accounts are managed using an external system.

Supported external authentication adapters include:

- Kronos
- LDAP (Active Directory)
- NTLM (Windows NT LAN Manager)
- ODBC
- OLE DB
- Oracle (E-Business)
- PeopleSoft (ODBC)
- SAP
- SQL Server (Table or View)
- Excel (Flat file or user names and passwords)

**Note:** Both LDAP and NTLM can be used to link security to Active Directory.

Contact ope.support@humanconcepts.com to inquire about authentication adapters not mentioned above or about the development of custom authentication adapters.

Setup of each authentication adapter varies based on the underlying technology. For information on how to configure a specific adapter, please visit the OrgPlus Enterprise Knowledge Base at [www.orgplus.com/support](http://www.orgplus.com/support).
Using Excel for Authentication and Authorization

This section provides an example of how to setup OrgPlus Enterprise security authentication and authorization using an Excel file (Single external system used for authorization and authentication).

Once setup is complete, you will be able to log into OrgPlus Enterprise using the user names and passwords specified in the Excel security file.

➢ To create an Excel security file:

1. Launch Excel.
2. Create a spreadsheet containing the following information for each user:
   - **User Name** – Defines a user name that can be used to log into OrgPlus Enterprise
   - **Password** – Specifies the password associated with a given user name.
   - **Role ID** – Specifies the role ID associated with a user name.
   - **Chart User ID** – Specifies the value that can be used to map a user to a box within a chart. Mapping a user to a box allows OrgPlus Enterprise to enforce structural security. Structural security is discussed later in this chapter.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
<th>Role ID</th>
<th>Chart User ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve</td>
<td>Steve123</td>
<td>Manager</td>
<td>1001</td>
</tr>
<tr>
<td>Sean</td>
<td>Sean123</td>
<td>HR Admin</td>
<td>1002</td>
</tr>
<tr>
<td>Phil</td>
<td>Phil123</td>
<td>Default</td>
<td>1003</td>
</tr>
</tbody>
</table>

3. Save the spreadsheet as Accounts.xls.

➢ To configure Excel security:

1. Log in to the Administrative Interface (see Administrative Login, page 7-4).
2. In the **OrgPlus Enterprise Admin Explorer**, click **Security | Access** to display the **Security Settings** page.
3. Select **External Security**.
4. In the **Stand Alone Authentication** drop-down menu, select **Excel**.
5. Click the button to display the **Authentication** panel.
6 Click **Browse...** to display the standard windows file browser dialog.

7 Select the file Accounts.xls (Created in the previous section). Click **Open**.

8 Enter the following values:
   - **User Name Column**: User Name
   - **Password Column**: Password
   - **Role ID Column**: Role ID
   - **Chart User ID Column**: Chart User ID

   **Note**: The Chart User ID is used to determine the mapping to an external authorization system.

9 Select the **Reset Password** checkbox to force end users to supply a new password the first time they log into OrgPlus Enterprise.

10 Click **OK** to close configuration screen and save changes

11 Click **Update** again to save Excel as Stand Alone Authentication system.

**Note**: Optionally, you can use the **Test Settings** button to determine whether the authorization method is configured correctly.
Advanced Excel Authentication and Authorization

The following optional columns can be included in your Excel security file.

- **Set Rights**: You can grant a user *rights to* another user’s security using the Rights To functionality (See Set Rights... in this Chapter). You can grant a user Rights To other users’ security by entering user names separated by commas in the Set Rights column.

- **Email Address**: This field is used to define the email address used to send forgotten password emails to end users. See SMTP Settings in Chapter 9, System Tools for more information on configuring OrgPlus Enterprise to send email notifications.

- **Force Reset Column**: Setting this column to 1 forces the user to supply a new password the next time they log in.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
<th>Email</th>
<th>Set Rights</th>
<th>Force Reset</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steve</td>
<td>Steve123</td>
<td><a href="mailto:steve@abc.com">steve@abc.com</a></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Sean</td>
<td>Sean123</td>
<td><a href="mailto:sean@abc.com">sean@abc.com</a></td>
<td>Steve, Phil</td>
<td>1</td>
</tr>
<tr>
<td>Phil</td>
<td>Phil123</td>
<td><a href="mailto:phil@abc.com">phil@abc.com</a></td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
Hybrid Security

To avoid having to create an account for every user, you may want to create a general access account.

Users requiring secure access must log in using a user name and password. All users that do not require access to secure data can access OrgPlus Enterprise using the general access account.

To create a general access account, follow the instructions for adding a new user account (see Internal User Accounts, page 7-6). Optionally, you can give general access users a special URL that enables them to access OrgPlus Enterprise without logging in.

**Note:** General access accounts are user accounts that have a blank password.

The URL for general access is formatted as follows:


**Note:** In the example above, the general access account has the user name **guest** in the URL. You can create additional general access accounts if necessary.

Roles

You must assign each user an OrgPlus Enterprise role. Each user’s role determines the user’s access privileges.

A role grants a user:

- Access to a domain (including limited access to a domain)
- Access to views within a domain
- Access to features (e.g. Print or Export to Excel)
- Access to individual fields (on a box by box basis)

Typically, an organization will not require a large number of roles. Make sure you perform a business needs analysis before creating and configuring roles.
Role Management

You manage roles within the administrative interface. When a user logs in, OrgPlus Enterprise determines their role according to the Security Setup (see Security Setup, page 7-3).

➤ To add a role:

1 In the OrgPlus Enterprise Admin Explorer, click Security | Roles to display the Role Management page.

2 Click the Add… button to display the Add Role panel.

3 Enter the Role Name for the new role and click OK.

The newly added role appears under Roles in the Admin Explorer to the left.

You must configure each role you create. See Role Configuration on page 7-15.

Note: By default, all new roles have access to all the fields in a domain. You should ensure that sensitive fields are set to the proper security level. See Managing Field Level Security, page 7-28 for more information.

Note: You can duplicate a role by selecting the Copy… button.

➤ To search for a role:

1 In the OrgPlus Enterprise Admin Explorer, click Security | Roles to display the Role Management page.
2 Use the Search drop-down menu to select the search field.

3 Enter the search criteria.
4 Click Search to display a list of roles that match the search criteria.

➢ To delete a role:
1 Perform a search (as described in the previous procedure) for the role you want to delete.
2 Select checkboxes in the delete column.
3 Click the Delete button. You are prompted to confirm the deletion.
4 Click OK. The role is deleted.

Note: If you delete a role, all users with the deleted role are assigned the default role.

➢ To modify a role:
1 Expand the Roles element by clicking its plus sign.
2 Select a role from the displayed list.
3 Modify the role as needed.
4 Click Update.

Role Configuration

You must setup the access privileges associated with each role.

➢ To rename a role or set the role ID:
1 In the Admin Explorer, expand Security by clicking its plus sign. Expand Roles by clicking its plus sign.
2 Select a role from the displayed list to display the role's properties on the right.
3 Select the Settings tab.
4 Modify the Role Name, Role ID, or Role Description.
5 Click Update.

➢ To configure domain access for a role:
1 In the Admin Explorer, expand the Security element by clicking its plus sign, then expand the Roles element by clicking its plus sign.
2 Select a role from the displayed list to display the role's properties on the right.
3 Select the **Domains** tab.

<table>
<thead>
<tr>
<th>Access</th>
<th>Domain Admin</th>
<th>Change Mgr</th>
<th>Domain Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>automotive</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>co_managers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>filtered_trees</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>groups</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>improved_duplicates</td>
</tr>
<tr>
<td>✓</td>
<td></td>
<td>✓</td>
<td>internal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>intrasphere</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>mb</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>new_orphans</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>no_hierarchy</td>
</tr>
</tbody>
</table>

4 Use the **Access** checkboxes to select the domains users of this role can access.

5 Use the **Domain Admin** checkboxes to select the domains that users of this role can modify. **Domain Administrators** can modify charts, profiles, indexes, and other elements associated with a domain; they cannot modify system and security settings.

6 Use the **Change Mgr** checkboxes to select domains for which users of this role can access the change management administration interface. See Chapter 11, *Change Management Administration* for more details.

7 Click **Update**.

**To configure view access for a role:**

1 In the **Admin Explorer**, expand the **Security** element by clicking its plus sign, then expand the **Roles** element by clicking its plus sign.

2 Select a role from the displayed list to display the role’s properties on the right.

3 Select the **Views** tab.
4 Select a domain. If multiple domains are defined you must define view access for each domain.

5 Use the Access checkboxes to select the views the role can access.

6 Click Update.

➢ **To configure field level security for a role:**


➢ **To restrict access within a domain:**

   1 In the Admin Explorer, expand the Security element by clicking its plus sign, then expand the Roles element by clicking its plus sign.

   2 Select a role from the displayed list to display the role’s properties on the right.

   3 Select the Restrict tab.
4 Select a domain. If you define multiple domains, you must define field access for each one.

5 You can restrict access to the Hierarchy (Chart), Directory, and OrgTree associated with each domain by selecting one of the following options:

- **Open Access**: All records are accessible.
- **Limited Access**: Access to records is restricted based on a Top Box. Users can see any record below and including the designated top box.
- **No Access**: No records are accessible.

6 If you choose limited access for the Hierarchy (Chart), Directory, or OrgTree, you must define the Top Box. Designate a top box using one of the following options.

- **Top of Chart**: The top most box is in the hierarchy defines the top box. Selecting this option is the same as selecting **Open Access**.
- **MySelf**: The current user designates the top box.
- **My OrgUnit Chief**: The head of the current user’s OrgUnit (or division) designates the top box.
- **OrgUnit**: Designate the chief position of the selected OrgUnit as the top box. Use the **Select...** button to specify an OrgUnit.
- **Level N supervisor**: Designate the current user’s manager (N=1), or manager’s manager (N=2), ... as the top box.
• **Level**: Specify the current user’s supervisor based on the level. For example, level 1 typically equates to the CEO, level 2 typically equates to a Vice president.

• **Filter**: Exclude all records that do not meet the criteria specified by the selected filter. Filter definition is discussed in this chapter.

**Note**: Select **Enable Chain of Command** to allow access to the records associated with the direct chain of supervisors for the selected top box. If **Enable Chain of Command** option is selected, you can also specify the maximum if number of supervisor levels that a user can access above the top box (as defined in this step).

7 Click **Update**.

**To configure access to Options:**

1 In the **Admin Explorer**, expand the **Security** element by clicking its plus sign, then expand the **Roles** element by clicking its plus sign.

2 Select a role from the displayed list to display the role’s properties.

3 Select the **Options** tab.

![Options tab](image)

4 Select a domain. If you define multiple domains you must define option access for each one.

5 Use the **Enabled Features** area to specify which features are enabled for each domain.
**Note:** You can restrict a user’s access to the OrgPlus Enterprise Modeler by turning off the **Send to Modeler** checkbox.

6 Use the **Enabled Panels** area to specify which panels are enabled for each domain.

7 Click **Update**.

**To configure access to External Links:**

1 In the **Admin Explorer**, expand the **Security** element by clicking its plus sign, then expand the **Roles** element by clicking its plus sign.

2 Select a role from the displayed list to display the role’s properties.

3 Select the **Links** tab.

4 Select a domain. If you define multiple domains you must define Link access for each one.

5 Select which Links are enabled for each domain using their checkboxes.

**Note:** See the **External Links** section on page 7-33 for more information.

6 Click **Update**.

**To configure access to Change Management:**

See **Chapter 10, Change Management Setup**.
Security

CHAPTER 7

Linking a User to a Domain

To enable OrgPlus Enterprise to determine the box that corresponds to the current user in a domain, you must specify a unique chart user ID for each user. This identifier is matched to a field within a domain. Typically, an employee ID or employee e-mail address is used as a unique identifier. Once you link a user record to a domain, you can use this information for structural security and, in some cases, for Role Determination.

➢ To set the chart user ID for a user account:

1. Perform a search (as described in a previous procedure) for the user for whom you want to set a unique identifier.
2. Click a User Name to display the Edit User Account panel.
3. Click the Chart User ID… button.
4. Enter the chart user ID value for each domain.
5. Click OK. The chart user ID is set.

Role Determination

Your security setup dictates how the role for each user is determined. If you set up OrgPlus Enterprise for internal security, refer to Role Determination for Internal User Accounts; otherwise, see Role Determination for External Authentication.

Role Determination for Internal User Accounts

If you manage user accounts through internal security, the role associated with the user is determined from the user account.

➢ To set role for a user:

1. In the Admin Explorer, click Security | Users to display the User Management page.
2. From the Search drop-down list to select the search field.
3. Enter the search criteria.
4. Click Search to display a list of users matching the search criteria.
5. Click a User Name.
6. Select a new role using the role drop-down list.
Click OK.

**Role Determination for External Authentication**

If you manage user accounts through external security, the role associated with the user is determined one of three ways:

- Calling an external authorization system
- Applying a role rule
- Using a shadow user account

**External Authorization**

OrgPlus Enterprise makes a call to an external security system that returns the role identifier for the current user. OrgPlus matches this role identifier to the roles defined within OrgPlus Enterprise. If no match is found, the user is assigned a default role.

Make sure to set the role ID for each role so that it matches exactly with a role ID returned from the external authorization system.

➤ **Setting the role ID for a role:**

1. In the OrgPlus Enterprise Admin Explorer, click Security | Roles to display the Role Management page.
2. Perform a search for the role whose details you want to modify.
3. Click a role name to edit.
4. Set the Role ID.
5. Click OK.

**Role Rules**

OrgPlus determines the role by applying a role rule to the data record corresponding to the current user. You attach a role rule to a specific data source and apply one or more conditions.

➤ **Adding a role rule:**

1. In the Admin Explorer, click Security | Role Rules to display the Role Rules page.
2. Click Add....to display the Add Rule panel.
3 Enter a **Rule name**.

4 To enable the rule, select the **Enabled** checkbox.

5 Select a **Domain** to identify the data record to which this rule applies. OrgPlus evaluates the fields in the data record against the role rule to determine the current user’s role.

   **Note:** Review *Chapter 10, Change Management Setup* to configure Change Management access. See *Linking a User to a Domain* on page 7-21 to ensure that a data record can be located for the current user.

6 Select the **Role** to which the rule applies.

7 Select the first and second conditions, define the third condition, then click **Add**.

8 Click **OK**.

➤ **Deleting a role rule:**

1 In the **Admin Explorer**, click **Security | Role Rules** to display the **Role Rules** page.

2 Select checkboxes in the delete column.

3 Click the **Delete** button.

4 Click **Update**.

➤ **Editing a role rule:**

1 In the **OrgPlus Enterprise Admin Explorer**, click **Security | Role Rules** to display the **Role Rules** page.

2 Click a role rule.

3 Click **OK**.
Shadow User Accounts

OrgPlus determines a user’s role according to the role assigned to an OrgPlus Enterprise shadow user account. To create a shadow account, use the procedure described in the Internal User Accounts section, page 7-6. The user type must be set to External.

![User Account Creation Form]

Typically shadow accounts are useful in determining a user’s role when role determination cannot be achieved using role rules or an external authorization system.

Default Role

If you do not specify a role when you add a new user account, OrgPlus automatically assigns it the default role.

➢ To set the default role:

1. In the OrgPlus Enterprise Admin Explorer, click Security | Role Rules to display the Role Rules page.
2. Select the default role from the Default Role drop-down list.

Field-level Security

For any role, you can control field display on a box by box basis. You can either use structural security, filter based security, or a combination of both.
Structural Security

Structural security relies on determining the box within a chart that corresponds to the current user. Once this box has been determined, you can control which fields a user can view within any chart box based on that user’s position within the chart.

For example, if salary information is included in an organizational chart, it is important to make sure that access to this information is properly restricted. To do this, you create two roles:

• Individual Contributor Role
• Manager Role

A user with the individual contributor role can view salary information for only their own record. Phil Jones in the example below has the individual contributor role.

A user with the manager role can view salary information for only themselves and their subordinates. Alison Sharp in the example below has the manager role.
Filter Based Security

Filter based security relies on determining the box (data record) within a chart that corresponds to the current user and then using one or more of the fields within that data record to determine field level security for any other box in the chart.

For example, if French HR Managers are allowed to see compensation information for only French employees, then a filter must be created to satisfy this business requirement.

Each data record must contain:

- **Location_ACL** (Access Control List) Specifies a list of countries in which the user has access to compensation information.
- **HRManager**: Specifies whether a user is an HR Manager
- **Location**: Specifies the location of the user.

When OrgPlus evaluates a filter for any given employee, the **Location** of the employee must be contained within the **Location_ACL** for the current user and the current user must be an **HRManager** for the compensation information to be displayed in the corresponding box.

> Adding a filter:

1. In the **OrgPlus Enterprise Admin Explorer**, click **Security | Filters** to display the **Filters** page.
2. Click **Add**...
3 Name the filter.

4 To enable the filter, select the **Enabled** checkbox.

5 Select a **Domain** to provide the data record for the filter. OrgPlus evaluates the fields in the data record against the filter.

   **Note:** Review the section *Linking a User to a Domain* page 7-20 to ensure that a data record can be located for the current user.

6 Define the first condition and then click **Add**. Define additional conditions as needed.

   **Note:** You can select the **Compare Fields** radio button to compare a field against another field. Typically, this option is used to create conditions for access control lists. For example, you could set a condition defined as **Location In Location_ACL** to give access only when the current user’s **Location_ACL** field contains a given user’s location.

7 Click **OK**.

**Deleting a filter:**

1 In the **OrgPlus Enterprise Admin Explorer**, click **Security | Filters** to display the **Filters** page.

2 Select checkboxes in the delete column.

3 Click the **Delete** button.

4 Click **OK**.

**Editing a Filter:**

1 In the **OrgPlus Enterprise Admin Explorer**, click **Security | Filters** to display the **Filters** page.

2 Click a filter name to edit a filter.

3 Click **OK** after making updates to the filter.
Managing Field Level Security

For each field you can configure field level security based on one of the following structural security rules:

- **Rule 1 - No Access**: Field is never displayed.
- **Rule 2 - Entire Chart**: Displays the field in all boxes.
- **Rule 3 - Subordinates**: Determines the box corresponding to the current user and then displays the field in only subordinate boxes.
- **Rule 4 - Self + Subordinates**: Determines the box corresponding to the current user and then displays the field in that user’s box and all subordinate boxes.
- **Rule 5 - Self**: Determines the box corresponding to the current user and then displays the field for only that box. If you use filter security, you must set the precedence using one of the following options:
  - **Structural Only**: Ignore any selected filters, use only structural information.
  - **Filter Only**: Ignore structural security rule, use only the filter.
  - **Structural OR Filter**: Include the field if the structural rule OR selected filter is satisfied.
  - **Structural AND Filter**: Include the field if the structural rule AND selected filter is satisfied.

To define field level security for a role:

1. In the OrgPlus Enterprise Admin Explorer expand the Security element by clicking its plus sign. Expand the Roles element by clicking its plus sign.
2. Select a role from the displayed list to display the properties of that role.
3. Select the Fields tab.
4. Select a domain. If you have defined multiple domains you must define field access for each domain.
5. Define field level security settings for each field. Select **Structural Security**, **Filter**, and **Precedence**.
6 Click Update.

Note: You can set all fields to the Entire Chart field level security by clicking the Set All Fields to Entire Chart button. Also, you can set all fields to the No Access field level security by clicking the Set All Fields to No Access button.

Single Sign On

Single sign-on (SSO) is a specialized form of authentication that enables a user to authenticate once and gain access to the resources of multiple software systems. OrgPlus Enterprise can be configured to support single sign on when launched or embedded in another web application.

Before deploying OrgPlus Enterprise you must determine the method that will be used for SSO. The method is typically determined by the web application that launches OrgPlus Enterprise (i.e. SAP Enterprise Portal, Oracle Portal or PeopleSoft Portal).

Note: HumanConcepts can build custom SSO adapters if you are using proprietary SSO mechanisms or have deployed mechanisms that are not currently supported in OrgPlus Enterprise. Contact sales@humanconcepts.com for more information.

You can configure SSO in the following ways:
• **Authentication and authorization determined by SSO Adapter.**
  Credentials passed from calling system contain both authentication and authorization information.

• **Different systems used for authentication and authorization**
  SSO Authorization and SSO Authentication adapters are separate.

• **SSO adapter used for authentication; role determined from underlying data source**
  The role is determined by applying a *role rule* to the data record that corresponds to the current user. A *role rule* is attached to a specific data source and consists of one or more conditions. For example, a field within a data source specifies a user as an HR administrator.

• **SSO adapter used for authentication; shadow user accounts determine role**
  Occasionally, the role for a specific user cannot be determined from a data source (Role determined from underlying data source) or an external system. In this case, the role for a user can be determined using the role assigned to an OrgPlus Enterprise *shadow* user account. See *Internal User Accounts*, page 7-6.

➤ **To configure Single Sign On:**

1. Log in to the Administrative Interface (see *Administrative Login*, page 7-4).

2. In the *OrgPlus Enterprise Admin Explorer*, click **Security | Access** to display the **Security Settings** page.

   ![Security Settings Page](image)

   - **Open access**
   - **Internal security**
   - **External security**

   - **Stand alone authorization**: None
   - **Stand alone authentication**: None
   - **Single sign on authorization**: None
   - **Single sign on authentication**: None

   - **Enable internal accounts**: [ ]
   - **Enable forgot password link**: [ ]
   - **Enable case-insensitive authorization**: [ ]

   **Update**

   **Single sign on authorization** is available only in the **External Security** access mode.

3. Select the adapter to be used for SSO.

4. Use the *...* button to enter setup parameters as necessary.
5 Click the Update button.

**Note:** The parameters vary for each SSO adapter. For information on how to configure a specific adapter, please visit the OrgPlus Enterprise Knowledge Base at [www.orgplus.com/support/ope/](http://www.orgplus.com/support/ope/).

### Set Rights...

You can grant a user *rights* to another user's security. This is useful for HR managers or administrators that need access to secure information for employees who are not their subordinates.

In the following example, an HR administrator (Don Briggs) is given rights to another employee’s security (Phil Jones).

Before granting Don Briggs rights to Phil Jones’ security:

![Before diagram]

After granting Don Briggs rights to Phil Jones’ security:

![After diagram]

➢ **To add additional rights for a user account:**

1 In the *OrgPlus Enterprise Admin Explorer*, click *Security | Users* to display the *Users* page.
2 Locate the user whose account needs additional rights.

3 Click the **Rights** link in the selected user’s row to display the **Rights** panel.

4 Find the users whose rights you want to grant to the user you selected in step 2:
   - Use the **Search** button to locate specific users.
   - Select users in the **Available Users** area and use the **Add** or **Add All** button to select specific users.

   **Note:** To view information about a user, double-click the user’s name. The **Description** area displays the user’s information.

5 Click **OK** when finished.

➢ To remove rights from a user account:

1 In the **OrgPlus Enterprise Admin Explorer**, click **Security | Users** to display the **User Management** page.

2 Perform a search to find the user whose rights you want to remove.

3 Click the User Name to display the **Edit User Account** panel.

4 Click the **Set Rights...** button to display the **Set Rights** panel.

5 Select the user whose accounts you want to revoke **Rights To**.

6 Click the **Remove** button to revoke the rights.

7 Click **OK** when finished.
8 Click **OK** to update the account.

**External Links**

You can add user selectable hyperlinks to the OrgPlus Enterprise user interface. Clicking an External Link launches a browser window based on the URL defined for an external link.

To add an External Link:

1. On the left of the browser window, expand the **Security** element by clicking its plus sign. Expand the **Roles** element by clicking its plus sign.
2. Select a role from the displayed list.
3. See the properties for the selected role displayed on the right, and make sure the **Links** tab is selected.
4. Select a domain. If you have defined multiple domains you must define Link access for each domain.
5. Click **Add…**
6. Define the link and click **OK**.
7. Click **Update** to save new link.
**Dynamic Substitution**

You can configure an external link so that information from the selected chart box can be dynamically included in the link.

The format of a dynamic field is: `[@<field name>@]` where `<field name>` is the name of the field that will be dynamically replaced by the value of the selected chart box.

For example, you can define the following external link URL to launch a browser window containing a map of an employee’s location:

```
http://mywebserver/find_map.aspx?employee_id=@EMPLOYEE_ID@
```

The `[@EMPLOYEE_ID@]` dynamic field will be dynamically replaced by the value of the EMPLOYEE_ID field of the selected box. As a result, the following URL will be generated:

```
http://mywebserver/find_map.aspx?employee_id=123
```

**Note:** You can also dynamically replace the value of the current user name and password that is logged into OrgPlus Enterprise by using the special parameters: `[@#username@]` and `[@#password@]`.

**Advanced Options**

OrgPlus Enterprise allows you to control advanced options such as session timeout length and use of SSL (Secure Sockets Layer).

**SSL Setup**

Secure Sockets Layer (SSL) is the standard security technology for creating an encrypted link between a web server and a browser. The SSL link ensures that all data passed between a web server and your browser remains private and secure. SSL is an industry standard and is used by millions of websites in the protection of their online transactions with their customers. In order to be able to generate an SSL link (signified by the gold padlock in the information tool bar), your web server requires an SSL Certificate.

**To setup SSL:**

1. In the OrgPlus Enterprise Admin Explorer, click Security | Advanced to display the Advanced page.
2. Select the SSL tab.
3. Define the SSL setup:
   - **No SSL:** Turn off SSL.
• **SSL for sign in and admin pages**: Encrypt user passwords and all administrative transactions.

• **SSL for all pages**: Encrypt all data passed between OrgPlus Enterprise and the client’s web browser.

  **Note**: Encrypting data for each transaction may impact performance if a large number of concurrent (100+) users are accessing OrgPlus Enterprise. **SSL for sign in and admin pages** provides a higher level of security requiring you to upgrade the processing power of your web server or add an external SSL accelerator.

4 Click **Update**.

  **Note**: Clicking the **Default** button turns off SSL.

### Session Timeout

After a certain period of inactivity, a user’s OrgPlus Enterprise session is automatically terminated. The default timeout is 120 minutes. You can set session timeout as needed.

➤ **To set session timeout:**

1. In the **OrgPlus Enterprise Admin Explorer**, click **Security | Advanced** to display the **Advanced** page.

2. Select the **Session** tab.

3. Enter a timeout value (in minutes).

4. Click **Update**.

  **Note**: Clicking the **Default** button resets the timeout to 120 minutes.
Chapter 8

Advanced Features

➢ In this chapter...

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Templates
Conditional Formatting
Chart Rules
Formulas
Pictures in Boxes
Multi-record Boxes
Hotspots
Duplicate Record Handling
Field Formats
Titles and Pictures
Portal Integration

Overview

OrgPlus Enterprise supports a number of powerful features that can be used to add value to your charts.
Templates

You create templates for OrgPlus Enterprise using OrgPlus Desktop software (Standard or Professional) or the OrgPlus Enterprise Modeler. When creating a template, you can enhance the template by adding conditional formats, groups, formulas, profiles, and directories. You also have full control over the formats of each field.

Conditional Formatting

Conditional formatting enables you to dynamically apply formatting to a sub-set of a chart that meets a set of user-defined criteria.

Refer to the OrgPlus Desktop User Guide for more information about conditional formatting.
Chart Rules

Chart Rules enables you to dynamically apply change branch styles of boxes in a chart that meets a set of user-defined criteria. For example, any employee with a job code that indicates that the employee is an assistant can be assigned the assistant branch style.

Refer to the OrgPlus Desktop User Guide for more information about Chart Rules.
Formulas

OrgPlus Enterprise can total headcounts, budgets, revenues, project hours and more.

Calculations can be performed only on **Number** fields.

- **Number** fields are used to enter discrete amounts, such as a salary or budget.
- **Formula** fields are calculated based on field values or chart properties (such as a count of subordinate boxes).

Conditional formulas are also available. Conditional formulas allow you to define formulas that include only boxes that meet predefined criteria. For example, one use of a conditional formula would be creating a count of all employees that are retiring in the next 12 months.

Refer to the *OrgPlus Desktop User Guide* for more information about defining formulas.
Pictures in Boxes

The **Box Layout** tab in the *Box Properties* dialog box in OrgPlus Desktop can be used to place pictures in chart boxes.

Refer to the *OrgPlus Desktop User Guide* for more information about how to position pictures in chart boxes.

Multi-record Boxes

You can create boxes that contain more than one record. For example, the entire sales team for an organization can be represented in a single box:

To define a multi-record box in OrgPlus Enterprise, you must define the box layout for the multi-record box using an OrgPlus template. You should use the second box on each level to define the box layout for a multi-record box.
Hotspots

OrgPlus Enterprise enables you to define any area within a box as a hotspot. Moving the mouse cursor over a hotspot dynamically displays a profile.

To define a Hotspot in OrgPlus Enterprise, you must use an OrgPlus template. The template must include a box layout containing a hotspot. The hotspot name used in the box layout must correspond to a profile defined within OrgPlus Enterprise. See Defining Profiles in Chapter 6 for more information.

Duplicate Record Handling

Chart boxes can include a list of alternate managers for any employee that has more than one manager allowing you to navigate directly to a specific occurrence of an employee that appears multiple times in a chart. You can display alternate managers in a callout. Moving the mouse cursor over the callout icon will display a callout containing the alternate managers to whom the employee reports.
Field Formats

OrgPlus Enterprise offers a number of options for formatting fields.

The supported field types are:

- **Text**
- **Date**
- **Picture**
- **Number**
- **Formula**

For each type, you can control exactly how the field appears when displayed in OrgPlus Enterprise. For example, a number field can be displayed as currency with two decimal places ($100.00) or a date field can be displayed as November 1, 2007 or 11/01/2007.

Refer to the *OrgPlus Desktop User Guide* for more information about formatting fields.

Titles and Pictures

Charts can now include pictures (such as a corporate logo), titles and sub-chart names as defined in the master page of the uploaded template.

Portal Integration

OrgPlus Enterprise provides a simple URL-based interface for integrating organizational charts in portal applications or third party systems.

You can visit the OrgPlus Enterprise Knowledge Base at [www.orgplus.com/support](http://www.orgplus.com/support) for more information on URL Integration.
Overview

OrgPlus Enterprise provides a number of **System Tools** for viewing activity logs and configuring application settings.
Refresh Log

OrgPlus Enterprise provides a log of all query activity against each data source.

➤ **To search the data refresh log:**

1. In the **OrgPlus Enterprise Admin** tree, click **System Tools | Refresh Log** to display the **Refresh Log** page.
2. Use the **Search** drop-down list to select the search field.
3. Enter the search criteria.
4. Click **Search**. A list of all entries that match the search criteria is displayed.
5. Click the **Details** link associated with any entry to view a detailed report of a refresh transaction.

**Note:** You can reset the log by clicking the **Clear** button.

Usage Log

OrgPlus Enterprise enables you to monitor system usage.

➤ **To search the usage log:**

1. In the **OrgPlus Enterprise Admin** tree, click **System Tools | Usage Log** to display the **Usage Log** page.
2. Use the **Search** drop-down list to select the search field.
3. Enter the search criteria.
4. Click **Search**. A list of all entries that match the search criteria is displayed.

**Note:** You can reset the log by clicking the **Clear** button.

Trace Log

You can use the trace log to help diagnose issues with OrgPlus Enterprise. Enabling the trace log can affect system performance. You should disable tracing for standard production use.

➤ **To turn on or off tracing:**

1. In the **OrgPlus Enterprise Admin** tree, click **System Tools | Trace Log** to display the **Trace Log** page.
2. Set the **Trace enabled** checkbox as needed.
3 Click **Update**.

**Note:** To clear the log, click the **Clear** button.

### E-mail Notifications

You can configure OrgPlus Enterprise to send email notifications. E-mail notifications are used to:

- Reset forgotten passwords
- Notify the OrgPlus Enterprise administrator of errors and warnings that occurred during a data refresh.

**To configure SMTP:**

1. In the OrgPlus Enterprise Admin Explorer, select **System Tools | E-mail.**
2. Select the **SMTP** tab.
3. Enter the SMTP settings:
   - **Host Name:** Enter the host name of your mail server.
   - **SMTP Port:** Enter the SMTP port used for sending mail.
   - **Sender E-mail:** Enter email address for the “From” email address.
   - **User Name:** Enter the user name used to log into the mail server.
   - **Password:** Enter the password used to log into the mail server.
   - **Secure Connection:** Specify the connection type used to communicate with your mail server.
4. Click **Update**.

**To setup E-mail Notifications:**

1. In the OrgPlus Enterprise Admin Explorer, select **System Tools | E-mail.**
2. Select the **E-mail Notifications** tab.
3. Specify when notifications should be sent:
   - **Off:** Do not send notifications.
   - **Errors only:** Send notification only when an error occurs during the refresh process.
   - **Errors and warnings:** Send a notification when an error or warning occurs during the refresh process.
   - **All Messages:** Send a notification after every refresh.
4. Set the recipients for notifications using the **To:** and **Cc:** fields. Use semi-colons to separate multiple addresses.
5 Click **Update**.

**Note**: To test your SMTP parameters click the **Test Connection** button.

### Export Configuration

You can export OrgPlus Enterprise configuration settings to XML. You can use the exported XML file to copy configuration settings from one instance of OrgPlus Enterprise to another. You can also use the XML file to backup configuration settings for any instance of OrgPlus Enterprise. Typically, the export functionality is used to migrate settings from a test server to a production server.

➢ **To export configuration settings:**

1 In the **OrgPlus Enterprise Admin Explorer**, click **System Tools | Export Configuration** to display the **Export Configuration** page.

2 Click the **Export to XML File** button.

3 Click the **Save** button when prompted to save the file.

### Import Configuration

You can import OrgPlus Enterprise configuration settings from an XML file. The XML file must be created using the export configuration function (see previous section).

➢ **To import configuration settings:**

1 In the **OrgPlus Enterprise Admin Explorer**, click **System Tools | Import Configuration** to display the **Import Configuration** page.

2 Click the **Browse...** button and select the XML file.

3 Select from the following import options:

   • **Domains**
     - **Replace all domains**: Removes all existing domains and create new domains from XML file.
     - **Replace all domains and keep data source**: Keeps existing data source settings for duplicate domains.
       **Note**: This option retains your production environment settings.
     - **Import only new domains**: Adds new domains but does not change existing domains.

   • **Security**
     - **Replace all security settings**: Replaces all security settings.
• **Replace all security settings and keep Access settings:** Replaces all security settings with settings from XML file except for the Access settings.

• **OrgPlus Enterprise Users**
  - **Import only new users:** Imports new OrgPlus Enterprise user accounts.
  - **Replace all users:** Removes all existing OrgPlus Enterprise users and create new users.

• **Options**
  - **Preferences:** Imports Preferences settings.

4 Click the **Import XML file** button.

### Servers

If OrgPlus Enterprise is running in a web farm environment, the **Servers** page allows you to view information about all the nodes in your web farm.

Visit the OrgPlus Enterprise Knowledge Base at [www.orgplus.com/support](http://www.orgplus.com/support) to find more information about configuring and monitoring a High Availability environment.

**Note:** In the **OrgPlus Enterprise Admin Explorer**, click **System Tools | Servers**.

### Change Log

The Change Log allows you to view a log of all installation and upgrade activity.

**Note:** In the **OrgPlus Enterprise Admin Explorer**, click **System Tools | Change Log**.
Chapter 10

Change Management Setup

In this chapter...

Overview
Change Management Administrator
Domain Setup
Role Configuration
Writeback

Overview

The Change Management Module empowers employees to submit change requests. Employees can request that a record be updated, transferred, removed, or added. This not only helps to keep organizational information up to date but also reduces the administrative burden on HR and IT.

To submit change requests, a user must have the appropriate security permissions. In some organizations any employee can submit a change request, in others a change request can be submitted only by managers for subordinate employees.

Once submitted, change requests are queued for approval. Typically one or more HR specialists (Change Management Administrators) are in charge of the approving change requests.

Note: The Change Management Module requires a license key. See Chapter 3, OrgPlus Enterprise Installation for more details.
Change Management Administrator

To use Change Management, you must identify one or more change management administrators in your organization. These administrators approve or reject all change requests before they are routed back into the source system.

Each user that logs in to OrgPlus Enterprise is assigned a role. The role determines whether a user has Change Management Administration privileges on a domain by domain basis.

**Note:** Chapter 11, *Change Management Administration* provides a detailed description of the functionality available to a Change Management Administrator.

➤ **To add Change Management Administration rights to a role:**

1. Click **Admin** to display the *OrgPlus Enterprise Admin* page.
2. Expand the **Security** element.
3. Expand the **Roles** element by clicking its plus sign.
4. Select a role from the displayed list.
5. Select the **Domains** tab.
6. Select the **Change Mgr** checkbox to grant Change Management Administration rights for the associated domain.
7. Click Update.

Domain Setup

You must properly configure a domain to enable users to submit change requests.

Fields

Any subset of fields within a domain can be updated through a change request. Fields that are not marked as editable cannot be updated through a change request.

➤ **To mark a field as editable:**

1. Click **Admin** to display the *OrgPlus Enterprise Admin* page.
2. Expand the **Domains** element. A list of domain is displayed.
3. Select a domain from the displayed list.
4. Select the **Fields** element.
5. Select the **Editable** checkbox for each field that can be modified via a change request.
Profiles

Users submit change requests from the Profiles Panel. See the Managing Domains section in Chapter 5, OrgPlus Enterprise Setup for more information about Profiles.

➢ To allow Change Requests to be submitted from a profile:

1. Click Admin to display the OrgPlus Enterprise Admin page.
2. Expand the Domains element.
3. Select a domain from the displayed list.
4. Select the Profiles element.
5. Select the Enable CR checkbox to configure a profile to allow change request submission.
6. Click Update.

Name and Title

OrgPlus Enterprise uses the name and title fields as part of a chart request. You must identify the name and title fields within your data for change management to work correctly.

➢ To set name and title fields:

1. Click Admin to display the OrgPlus Enterprise Admin page.
2. Expand the Domains element.
3. Select a domain from the displayed list.
4. Select the Change Mgmt element. The Change Mgmt panel is displayed.
5. Select the Name and Title fields using the corresponding drop-down menus.
6. Click Update.
Role Configuration

To submit change requests, a user must have the appropriate permissions. You can use structural or filter based security to control which boxes a user can submit change requests against.

Structural Security

You can limit Change Request permission using the following structural security rules:

**Rule 1 - No Access:** Cannot submit Change Requests.

**Rule 2 - Entire Chart:** Can submit Change Requests for all records.

**Rule 3 – Subordinates:** Determines the user’s chart box and permits Change Request submissions only for the user’s subordinates.

**Rule 4 - Self + Subordinates:** Determines the user’s chart box and permits Change Request submissions only for the that user and their subordinates.

**Rule 5 - Self:** Determines the user’s chart box and permits Change Request submissions only for that user.

Filter Based Security

You can use filter based security to control which boxes a user can submit change requests for. Filter based security relies on defining a condition based on one or more of the fields within a data record. If the condition is satisfied, a change request can be submitted against that record.

For example, a French HR Manager is allowed to submit change requests for French employees only.

See Chapter 7, Security for more information on Filters and Filter Definition.

Precedence

If you use structural or filter based security, you must set the precedence using one of the following options:

**Structural Only:** Ignore any selected filters, use only structural rule.

**Filter Only:** Ignore structural security rule, use only the filter.

**Structural OR Filter:** Allow change requests if the structural rule OR selected filter is satisfied.

**Structural AND Filter:** Allow change requests if the structural rule AND selected filter is satisfied.
Change Request Submission Rights

A user’s role determines which records a user can submit change requests against.

➢ **To add Change Request Submission Rights to a role:**

1. Click **Admin** to display the *OrgPlus Enterprise Admin* page.
2. Expand the **Security** element.
3. Expand the **Roles** element by clicking its plus sign.
4. Select a role from the displayed list.
5. Select the **Change Mgmt** tab.
6. Select a domain from the drop-down list.
7. Select the **Submit Change Request** checkbox.
8. Set security options as needed (**Structural security**, **Filter** and **Precedence**).
9. Click **Update**.

**Note:** To ensure that structural and filter based security work correctly, make sure that OrgPlus Enterprise can link the current user to a box in the domain. See *Linking a User to Domain* in Chapter 7, *Security* for more information.

Writeback

OrgPlus Enterprise can write back approved change requests to the source system (for example, SAP, Oracle, or PeopleSoft). OrgPlus Enterprise queues approved change requests in the Change Administration Outbox and then writes the changes back to the source system on a scheduled basis or upon manual request.

Typically, a professional services engagement is required to implement writeback to a customer’s HR system.

Text File Writeback Adapter

The Change Management Module includes a Text File Writeback adapter. The text file generated by the Text File Writeback adapter can be written to a known location and then picked up by a batch file for processing into the source system. Processing can be done manually or programmatically.

➢ **To configure the Text File Writeback adapter:**

1. Click **Admin** to display the *OrgPlus Enterprise Admin* page.
2. Expand the **Domains** element.
3. Select a domain from the displayed list.
4 Select the **Change Mgmt** element to display the **Change Mgmt** panel.

5 Select the **Writeback** tab.

6 Set the **Outbox writeback frequency**. Choose from the following options:
   - **Manual**: Do not perform the writeback automatically.
   - **Every**: Specify a time interval for writeback.
   - **Daily At**: Specify a time of day to perform the writeback.
   - **Weekly**: Specify a weekly schedule for writeback.

7 Select the **Text Adapter**.

8 Click on the **...** button. Specify the output parameters:
   - **Output Location**: The path where the output will be stored.
   - **Base Name**: The base file name for the output. The date and time will be appended to the base file name.
   - **Format**: Specify csv (comma delimited text file) or xml.

9 Click **Update**.

**Managing Change Requests**

By default, OrgPlus Enterprise will store all sent and rejected change requests (Sent change requests are items that are routed back to the source system). You can manually delete sent or rejected change requests or configure OrgPlus Enterprise to automatically purge change requests after a specific period of time.

➢ **To configure automatic purge of change requests:**

1 Click **Admin** to display the **OrgPlus Enterprise Admin** page.

2 Expand the **Domains** element.

3 Select a domain from the displayed list.

4 Select the **Change Mgmt** element to display the **Change Mgmt** panel.

5 Select the **Options** tab.

6 Use the checkboxes to set purge options.

7 Click **Update**.
Overview

To use Change Management, you must identify one or more change management administrators in your organization. These administrators approve or reject all change requests before they are routed back into the source system. This chapter is intended as a guide for Change Management Administrators.
Change Management Administration Interface

You use the Change Management Administration Interface for all of the Change Management Administration you perform. The Change Management Administration Interface allows administrators to approve, edit, and reject change requests.

**Note:** Your role determines whether you have Change Management Administration privileges on a domain by domain basis. You may need to contact your system administrator if your role does not allow you to access the Change Management Administration Interface.

To access the Change Management Administration Interface:

1. Log into OrgPlus Enterprise.
2. Select the **Change Mgmt** module from the landing page.

   OR if you are already logged into OrgPlus Enterprise, select **Change Mgmt** tab.

3. Each domain has a separate change request queue. If your system contains multiple domains make sure you have the correct domain selected.

Change Requests

End users can submit four types of change requests:

- **Add Subordinate Request** allows end users to request the addition of a record to the organizational chart.
- **Remove Request** allows end users to report records that are no longer part of the hierarchy.
• **Transfers Request** allows end users to report a change of an employee’s supervisor.

• **Update Request** allows end users to modify an employee record.

Change Management Administrators must review each request and determine if the request is valid. Invalid requests can be rejected or edited. End users can view the status of requests (including comments from the Change Management Administrator) and resubmit if needed. Change Management Administrators can also edit requests to correct any errors.

Change Management Administrators can also submit requests when viewing charts and directories in OrgPlus Enterprise. An **Approve** button is available during request submission to allow Change Management Administrators to place requests directly in the Change Management Outbox.

## Workflow

All change requests must be approved or rejected before they are routed back to the source system. OrgPlus Enterprise queues change requests in the Change Management **Inbox**. Change Management Administrators can edit, approve, or reject **Inbox** items. Approved items queue in the **Outbox**. **Rejected items** are moved to the **Rejected Items** folder. You can route **Outbox** items back to the source system on a scheduled or manual basis. Actioned items are stored in the **Sent Items** folder.

Change Management Administrators must check the Change Management Inbox periodically to make sure that Change Requests are processed.

## Request States

As a change request moves through the change management workflow its state changes. A change request can have the following states:

- **Submitted** requests need to be approved or rejected by a Change Management Administrator. Submitted requests are located in the **Inbox**.

- **Approved** requests are queued to be routed into the source system. Approved requests are located in the **Outbox**.

- **Rejected** requests are stored in the **Rejected Items** folder.

- **Sent** items that have been routed to the source system are stored in the **Sent Items** folder.
• **Failed** - If an item cannot be routed back to the source system (connectivity or data validation error) it is moved back to the Inbox. The Change Management Administrator is responsible for determining the reason for failure. Once the cause of failure has been mitigated, the change request must be approved (again) or rejected.

**Inbox**

The Change Management **Inbox** folder shows a queue of all submitted change requests.

➢ **To approve a change request:**

1. Select the **Inbox** folder.
2. Check the items that you want to approve using the **Select** column. To review the details associated with an item click on the associated **CR#** link.
3. Click **Approve** to move the selected items to the **Outbox** folder.

➢ **To reject a change request:**

1. Select the **Inbox** folder.
2. Check the items that you want to reject using the **Select** column. To review the details associated with an item click on the associated **CR#** link.
3. Click **Reject** to move the selected items to the **Rejected Items** folder.

➢ **To edit a change request:**

1. Select the **Inbox** folder.
2. Select a **CR#** link to display the Change Request.
3. Update the CR as needed.

   **Note:** For details on updating change requests see Chapter 6 or the *OrgPlus Enterprise User Guide*.
4. Click **OK**.

**Outbox**

The Change Management **Outbox** folder shows a queue of all approved change requests that are waiting to be sent to the source system. Change Requests in the **Outbox** cannot be edited. You must first move them back to the inbox using the **Move to Inbox** button.

**Sent Items**

The Change Management **Sent Items** folder contains all actioned change requests.
Rejected Items

The Change Management Rejected Items folder shows a list of all rejected items. Change Requests in the rejected items folder cannot be edited; use the Move to Inbox button to move a change request back to the inbox.

Preferences

You can limit the history shown in the Sent Items and Rejected Items folders using the Change Management Preferences panel.
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