

# OrgPublisher 8 PluginX Implementation Guide

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# Introduction

OrgPublisher automatically builds organizational charts from information stored in your company HR system. It charts hierarchical data (such as person-to-person, position-to-position and department-to-department relationships) from your existing HR system, and automatically creates an org chart based on the hierarchy extracted.

The resulting chart is published to your intranet and periodically refreshed to ensure that changes made to your HR system are updated in the org chart. Once published to your corporate intranet, the data represented on the chart can be used for on-the-fly data analysis and reporting.

Real-time charts provide users with immediate access to up-to-date information. Dynamic organizational charts are generated using real-time access for any SQL, Oracle, or Microsoft® Access data source, and then published in EChart format.

**Note:** Real-time publishing is not available when building charts from multiple data sources.

OrgPublisher comes in Enterprise Edition, Advantage Edition, and OrgPublisher™ for SAP® solutions.

OrgPublisher connects to an ODBC compliant data source and allows for import of data directly from the data source as well as other sources of data such as XML, CSV, and LDAP. In addition connection to well known ERP and HR systems such as, PeopleSoft and Oracle are easily achieved. Additionally, OrgPublisher™ for SAP® solutions is available with and comes with easily customizable SAP output formats.

For more information, please contact Aquire at <http://www.aquire.com/>.

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# OrgPublisher Architecture Overview

OrgPublisher architecture consists of four primary components as shown in Figure 1:

- A *Data Source* that provides the data to be acted upon to produce the Org Chart.
- An *Org Chart Publishing Computer* on which OrgPublisher has been installed that enables the org chart administrator to select the appropriate data, apply the appropriate arrangement and formatting components, and publish the final chart for viewing by end users.
- An *Intranet Web Server* or computer to host the published org chart files; may or may not be the same as the publishing computer.
- A *Web Browser* that provides for interactive viewing of the published org chart information.

## OrgPublisher Architecture Components

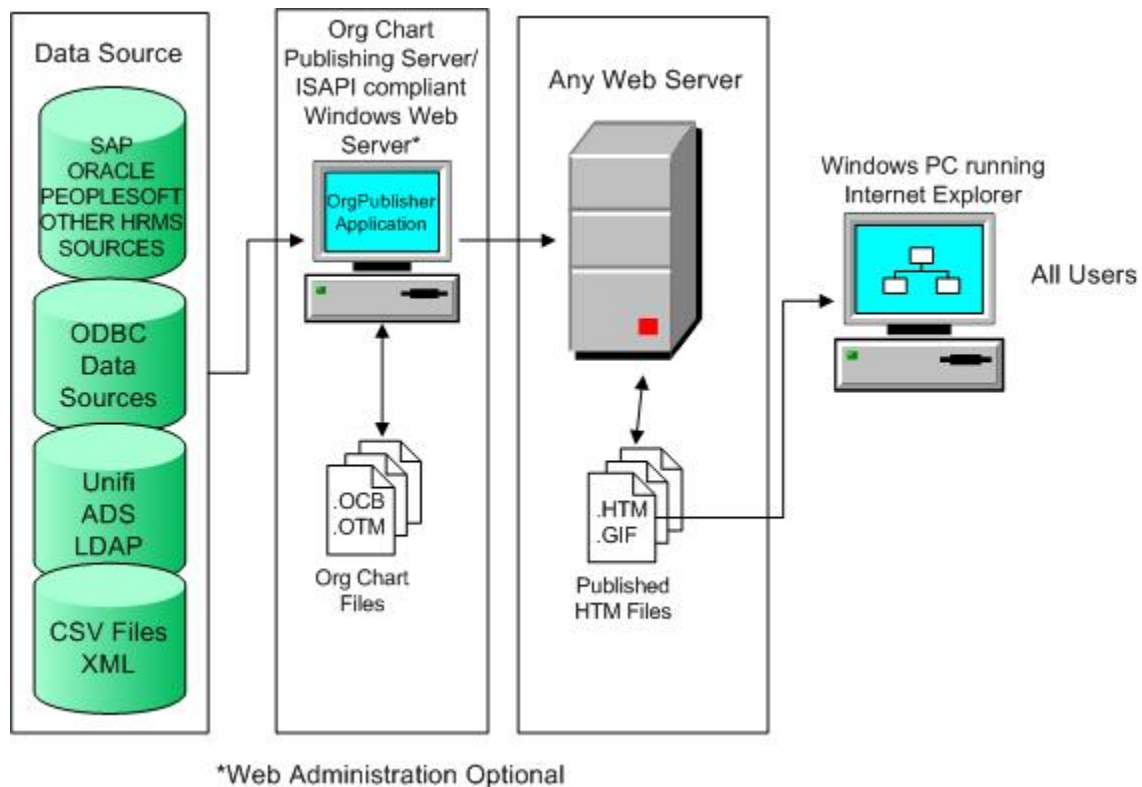


Figure 1.

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## Data Source

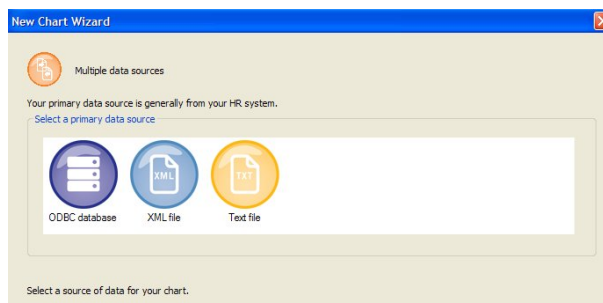
The data source can be any data source that contains reporting information. You can even build a chart from multiple text, ODBC, and XML data sources.

The data source connectivity is accomplished in one of several ways. OrgPublisher provides ODBC, XML, and CSV file connection. Additional connectors for Oracle HR, Directory Servers, and PeopleSoft are available from the Aquire web site. OrgPublisher™ for SAP® solutions is available for SAP customers. Additional connectors are available from our Alliance Partners.

Data sources include:

- HRMS and Payroll databases from several vendors such as:
  - SAP
  - Oracle
  - PeopleSoft
- ODBC data sources such as:
  - Microsoft SQL Server™
  - Microsoft Access™
  - Oracle
  - Other ODBC compliant data sources
- Directory Servers such as:
  - Microsoft Exchange™
  - Microsoft ADS™
  - Netscape
  - Novell
- Other data sources
  - XML data sources
  - CSV (comma separated value) data files

Any combination of two or more ODBC, XML, and text data sources can also be used to build a single chart. The New Chart Wizard allows the use of multiple data sources.



**Figure 2.**

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## ***Org Chart Publishing Computer***

Org charts are developed using OrgPublisher on a Windows platform computer (workstation or server) that provides the org chart administrator with the capabilities to select the desired data, associate the appropriate formatting characteristics to data, and publish the chart for viewing by end users.

Installation is straight forward, using a standard wizard driven interface to collect information. The installation is an executable (EXE). At this time an MSI installation is not available.

Refer to the Web Administration documentation to install on a server for use by multiple administrators or to allow administrator access from any laptop or home computer.

### Workstation Requirements

- Pentium® PC compatible or greater
- 128 MB of RAM
- 60 MB available hard disk space
- Microsoft® Windows® 2000, Windows® XP, or Windows® Vista
- Adequate storage space for charts
- Automatic publishing requires Microsoft® Windows Task Scheduler (available as a component in Internet Explorer 4.0 and later)

## ***Intranet Web Server***

The OrgPublisher product utilizes a Windows platform computer, which can be either a network computer or a web server. For large charts utilizing EChart publishing (discussed later in this document), a web server utilizing Microsoft® Internet Information Server (IIS) is required.

### EChart Server Requirements

- Pentium® PC compatible or greater
- 512 MB of RAM minimum, depending on chart size
- 60 MB available hard disk space
- A Microsoft® IIS (ISAPI enabled) Windows® 2000, Windows® XP, Windows® 2003 web server or Apache™ HTTP Server 2.0+ running Windows operating system
- A virtual directory with execute permissions for scripts and executables on the web server

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## Web Browser Requirements

Determine the publishing option that best fits the need of the organization. Different browser and server requirements apply depending on the selected publishing option.

Publishing option choices include:

- Graphic, HTML, Mobile Device (publishing formats that require no additional browser components).
- PDF, requires current version of the free Adobe Reader.
- PluginX, which provides interactive org charts. This option requires the installation OrgPublisher PluginX component.
- EChart Rich Client, which also requires the OrgPublisher PluginX component.
- EChart Thin Client, which requires no plug-in to view the published chart.

## OrgPublisher PluginX Browser Specifications

(EChart Rich or PluginX options)

- Microsoft® Internet Explorer 6 and later for all versions of Windows® mentioned above

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## Publishing Options

There are several publishing options available. These are discussed in more detail in the next section.

- PluginX – for full user functionality and chart password security.
- Graphic – (.JPG or .GIF) for importing to PowerPoint or other applications.
- HTML or HTML with drill up/drill down - for viewing on Non-Windows platforms such as Mac or Unix.
- PDF publishes a chart to PDF document.
- EChart – for performance enhancement of large charts. EChart allows security based on several kinds of authentication, field level security and hierarchical security.
- EChart Thin Client - provides functionality without a plug-in.
- Mobile Device –for viewing on hand held devices.

### *PluginX*

OrgPublisher's PluginX uses Microsoft's ActiveX technology to display the org chart in a browser. The PluginX is a single file called **OrgPubX.ocx**. Additionally, there is a new feature called OrgPlan that also uses an ActiveX control. OrgPlan is discussed later in the document.

The PluginX file is packaged into a signed CABINET file, also referred to as a CAB file. The CAB file is designed to automatically download the first time the end user views the chart. It installs **OrgPubX.ocx** into the windows system directory and registers itself in the computer's registry. Once installed and registered, org charts can be viewed in Internet Explorer.

### *Publishing PluginX*

When a chart is published using the PluginX option, several files are produced; an HTM file, a JS file, a CFG file, an XML file, and an OCP file. The OCP file contains the chart data and formatting information. The HTM file contains code that is designed to check for several things.

- It checks the browser type, Internet Explorer. For Internet Explorer implementation, continue.
- It calls the JS file and checks the codebase statement. The codebase statement looks like the following.

```
document.write('codebase="http://www.aquire.com/codebase8/OrgPubX.cab#Version=8,0,1456,1"');
```

- If the PluginX is not registered, then a new CAB file is downloaded using the codebase URL.

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- If the PluginX is registered, then the codebase function compares the version number that is registered with the version number in the codebase statement.
- If the codebase statement version number is greater than the registered PluginX, then a new CAB file is downloaded using the codebase URL.
- If the codebase statement is the same or less than the registered PluginX, then the chart is loaded using the existing, registered PluginX.

## ***Alternate CAB File Location***

The default CAB file URL goes to Aquire's web site. However, if desired, the CAB file can be downloaded from

[http://www.aquire.com/downloads/plugins/PluginXCabinet\\_v8.html](http://www.aquire.com/downloads/plugins/PluginXCabinet_v8.html) and deployed from a server within your organization. The codebase statement in the published JS file must then be modified to point to the internal location you deploy it to, as shown in the example.

```
document.write('codebase="http://mywebserver.com/codebase8/OrgPub  
X.cab#Version=8,0,1546,1"');
```

Each time you publish as PluginX, a new version of the OCP file (data and formatting), HTM file, JS file, and XML file are produced. To preserve changes made to the HTM file, clear the "Overwrite existing HTM file" option in the publishing definition. This also preserves the JS file. Clearing the check box is done during creation of a new publishing definition or when updating an existing publishing definition. See Figure 3.

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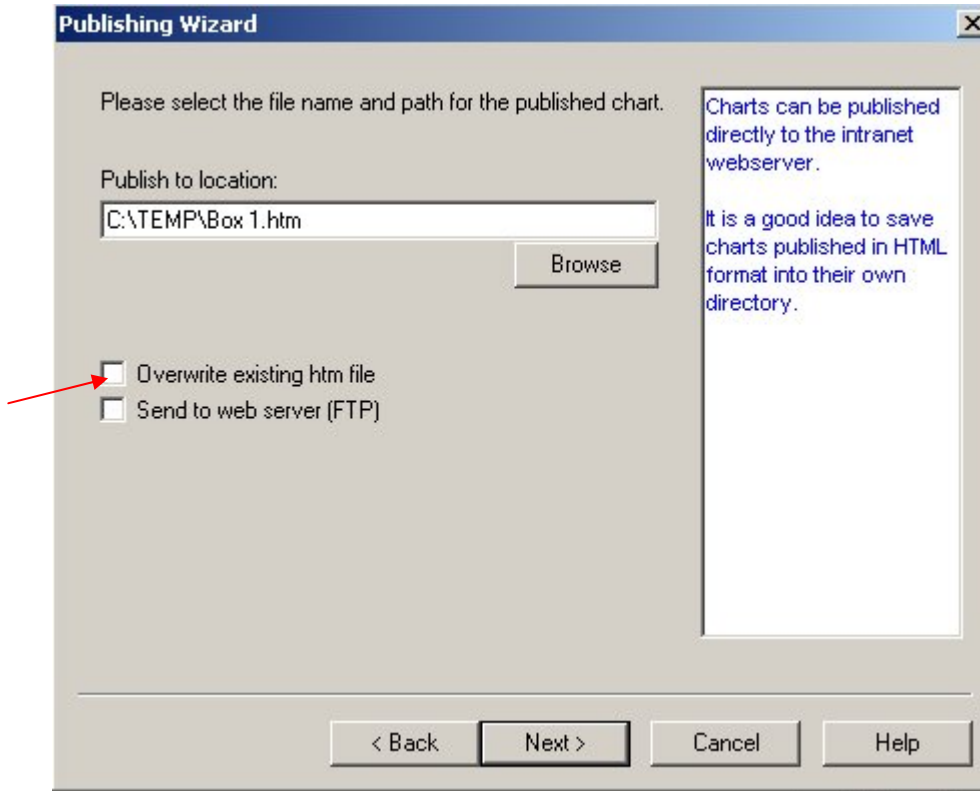


Figure 3.

Clear the **Overwrite existing htm file** option to preserve HTM file modifications.

## ***PluginX Implementation on Secured Workstations***

The PluginX needs to be registered in order for a chart to load. When an ActiveX control is registered for the first time, certain keys in the registry in **HKEY\_CLASSES\_ROOT** are written.

With operating systems up to and including Windows 9.x and Windows NT 4.0, the security model allowed normal users to register components by writing values to **HKEY\_CLASSES\_ROOT**. Windows 2000 and Windows XP implement different security models from earlier versions of Microsoft operating systems (more specifically Windows NT 4.0).

Normal users (non Admin/Power Users) are no longer allowed to write to **HKEY\_CLASSES\_ROOT** unless they have been given permission to do so. Users wishing to write to **HKEY\_CLASSES\_ROOT** must be a member of the local Administrators or Power Users group. *This level of permissions is too broad for many organizations. Organizations wishing to "lock down" the desktop, and thus*

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*control what is installed on a workstation, remove this level of permissions. This prevents the ActiveX control from registering.*

## PluginX Registration for Non-admin users

An alternate method is to register the ActiveX control file in an area of the registry where a non-admin user has appropriate rights. This is possible due to a new implementation of the Windows XP registry.

Non-admin users are permitted to write to **HKEY\_CURRENT\_USER\Software\Classes**. In this new registry implementation, ActiveX components continue to use **HKEY\_CLASSES\_ROOT** for machine-wide settings but also allows per-user configuration of Class IDs (CLSIDs) to provide greater security and flexibility. Under Windows XP, ActiveX controls first consults **HKEY\_CURRENT\_USER\Software\Classes** prior to looking under **HKEY\_CLASSES\_ROOT**.

This is done through a manual PluginX implementation process, which is described below.

## Manual PluginX Implementation

There are several ways to manually install the PluginX.

- Administrators
  - Have an administrator login and open an org chart with a browser. This downloads the CAB file and installs the PluginX. Once loaded, it stays loaded for all users of that computer.
  - Run an automated process that “pushes” (copies) the PluginX file **OrgPubX.ocx** to the end user’s computer (in a location they have access to) and then registers it.
    - ◆ Registration is accomplished using the command **Regsvr32.exe** from a command prompt, using the syntax:  
  
**Regsvr32 OrgPubX.ocx**
- Non-admin Users
  - Download an installation program that installs the ActiveX file to an area that non-admin users have access to, and then registers the control into **HKEY\_CURRENT\_USERS**. We have two versions of this program:
    - ◆ One that prompts the user for the location of the ActiveX control, and then updates the registry with the settings, using the location selected for the two string values that require it. If the user selects a folder that they do not have access rights to, they are prompted

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with a message box stating that an error has occurred and the program exits without updating the registry.

- ◆ One that is hard coded to **C:\Program Files\Internet Explorer\Plugins**. This program does not prompt the user, other than displaying a message box indicating that the system configuration is being updated.

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## ECharts

EChart publishing is designed to publish charts with a large number of records and/or custom fields, or when you would like to publish secure charts based on authentication methods (NT or custom methods using custom fields). ECharts are published in two ways: EChart Rich Client uses the OrgPublisher PluginX discussed in this document. EChart Thin Client requires no end user browser component add-on.

A Microsoft® IIS (ISAPI enabled) Windows® 2000, Windows® XP, Windows® 2003 web server or Apache™ HTTP Server 2.0+ running Windows operating system is required to display an EChart. A virtual directory with execute permissions for scripts and executables must exist on the web server. The URL to the virtual directory is entered as part of an EChart publishing definition.

Several files are created when the EChart is published. These files can either be published to the virtual directory folder, or published locally and then copied to the virtual directory folder. OrgPublisher includes an FTP client that can be configured in the publishing definition.

All files have the same name with different extensions:

- **.ocp** — Similar to a current OCP file except that it contains no records. Instead, it contains information needed to contact the EChart server.
- **.dll** — The ISAPI DLL file. This is the web server control file that controls loading and unloading of chart data into memory.

**Note:** The DLL file must be replaced if you upgrade OrgPublisher.

- **.htm** — The standard htm file created when publishing. This is the file used to access the org chart. PluginX is required to view an EChart.
- **.js** — This is a Java Script file that is called by the HTM file. It checks the codebase value and provides the code necessary to call the PluginX and load the chart file.
- **cfg.xml** — This file is used only by EChart Real-time charts and Thin Client charts.
- **.ocs** — The EChart data file. This file contains important chart data.

**Note:** All file security authentication access for this file must be removed to prevent users from downloading it. Use IIS manager, changing the file properties on the **File Security** tab.

- **.bat** — A batch file that can be used for automated publishing of the EChart. The publishing process will only create this file if it does not already exist. It performs the following steps:

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- Unloads data from the EChart server's memory. This is important because if the server has data loaded, it might not have enough memory to publish.
- Publishes the EChart.
- Loads the new EChart data into the server's memory.

The BAT file must be executed to refresh the chart. The Publishing Wizard cannot unload and load the data.

The batch file is created using the current computer that OrgPublisher is installed on. If you publish to a different computer than the one OrgPublisher is installed on, the batch file will require modification because paths change.

## Log Files

ECharts log activity when published and access using EChart security. The log file is the same name as the file that is published. When the web service is restarted, the next access to the EChart causes a new log file to be created. The previous log file is renamed to preserve past information. This occurs up to 9 times. After that, each log file is cycled through the 9 backup files, and the 10th file is then lost.

## ***Special EChart Security Considerations***

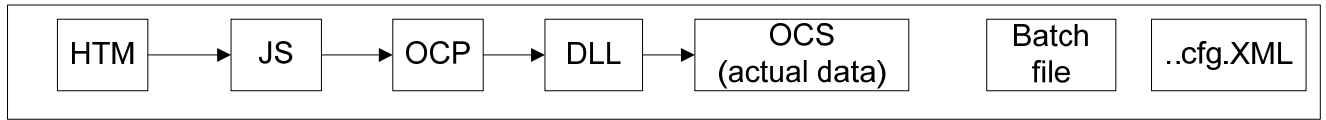
Normally ECharts are published to a physical chart folder with Scripts and Executable Permissions and the users access it with a link to the virtual directory where the files were published. Figure 3 shows the normal access flow.

- The HTM is accessed.
  - The HTML code checks to see that the OCX is loaded. If it is not loaded, it attempts to automatically download and install it (see PluginX section)
  - The HTML code then calls the OCP file
- The OCP file points to the DLL location. This location is the published virtual directory *specified when creating the publishing definition*.
- The DLL file assumes the OCS file is in the same folder as the DLL. It access the OCS file, filters the actual chart data based on security definitions for the published chart, and serves the resulting data as an org chart to the browser.

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### Normal Echart File Flow

Physical Chart Folder/URL with Scripts and Executable Permissions



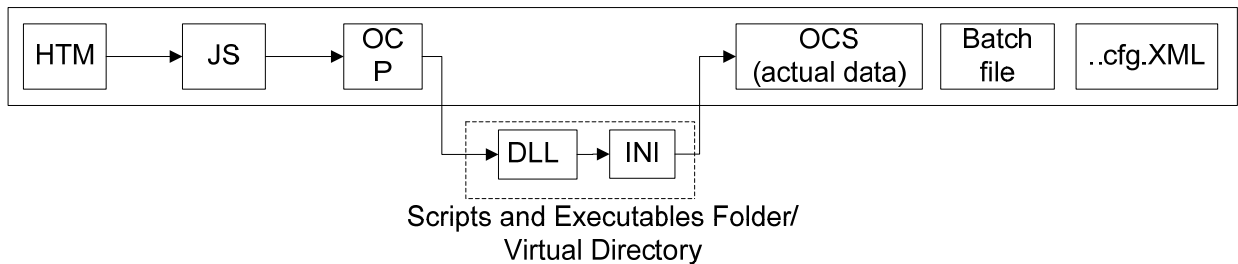
**Figure 4.**

This scenario creates a security issue, due to the fact that you have a folder that has execute permissions. If a non-authorized DLL was placed in this folder, functions from this DLL could be executed from the virtual directory.

Starting with OrgPublisher 7, the DLL is engineered to first look for the OCS file in the same folder that it resides, and then if it does not find it, it then looks for an INI file that contains the path of the OCS file. This data flow is show in figure 5 below.

### New Echart File Flow

Physical Chart Folder with no execute permissions



**Figure 5.**

This new capability allows you to publish chart files to a physical directory that is different from the virtual directory, allowing you to “isolate” the Scripts and Executables folder.

The INI file would have a section that is the same name as the published EChart. Below is an example.

```

[OrgPublisherEChart]
OCS_PATH="C:\Path\To\Ocs\File.ocs"
  
```

## Multiple ECharts on a Web Server

When multiple ECharts exist in the same virtual directory, they all share a single process (**dllhost.exe**). There is a limit of four (4) memory allocations a single instance of dllhost.exe can perform.

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The implementation solution for this scenario involves running each EChart in a separate instance of **dllhost.exe**. When run this way, each EChart has its own process in which to live. It's also much safer. In the event of an error, only the affected EChart will stop responding.

To implement this, create a virtual directory on the web server for each EChart. The virtual directories should have execute permission and 'Application Protection' set to 'High (isolated)'. The charts are then accessed through their respective virtual directories. HTTP redirects can be used so that the end user is unaware that multiple virtual directories are used.

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# Charts on Windows Server 2003

When publishing to Windows Server 2003, some additional settings are required.

## MIME Type

Set the MIME (Multipurpose Internet Mail Extensions) type for your web server at the lowest level allowed by your web server administration program. In Microsoft IIS this is done at the web site level.

1. Right-click on the My Computer icon on your desktop and select **Manage**. The *Computer Management* dialog opens.
2. Expand **Internet Information Services**.
3. Right-click on **Web Sites** and select **Properties**. The *Web Sites Properties* dialog opens.
4. Click the **HTTP Headers** tab.
5. In the **MIME Map** area, click **File Types**. The *File Types* dialog opens.
6. Click **New Type**.
7. In the **Associated extension** field, type **.ocp**.
8. In the **Content type (MIME)** field, type **.ocp**.
9. Click **OK**. Click **OK** again to close the *File Types* dialog.
10. Click **OK** to close the *Web Sites Properties* dialog.
11. Close the *Computer Management* dialog.

## Web Server Extension

1. Open the *Control Panel* window.
2. Open the *Administrative Tools* window.
3. Open the *Internet Information Services* window.
4. Expand **Internet Information Services**.
5. Expand the **(local computer)** option.
6. Expand **Web Service Extensions**.
7. In the right pane of the window, select **Add a new Web service extension**. The *New Web Service Extension* dialog opens.
8. Type a name that represents the name of the file you publish as an EChart in the **Extension name** field.
9. Click **Add** next to the **Required files** pane, and **Browse** to the published chart folder. Select the EChart file name that ends with the **.dll** extension.
10. Select the **Set extension status to Allowed** check box.
11. Click **OK** to close the *New Web Service Extension* dialog.
12. Close the *Internet Information Services*, *Administrative Tools*, and *Control Panel* windows.

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## OrgPlan Overview

The OrgPlan feature is available in PluginX or EChart Rich Client publishing. OrgPlan provides the ability for selected individuals to create and share organizational models. These charts contain different menus from the standard published charts.

Planning charts can be saved to the end user's local hard drive or to your web server in a subfolder automatically created by OrgPublisher.

If you elect to use a web server, you can use the EChart options to add security to the planning charts. End users can see a list of planning charts created by themselves and their subordinates. Chart Administrator or the end user can also password protect the planning chart and, if more than one user tries to open the same chart, a message displays that someone else is modifying the chart and a read-only option is available.

Planning charts work with a special menu and toolbar, and are always in Build Mode. Build Mode does not reflect special formatting, such as multi-level peer display, reports in the same box as their manager, or the Advanced Box Layout settings.

**Note:** If you save multiple planning charts to the same web folder, you must specify separate storage folders in order to maintain user name and password security.

## OrgPlan Deployment

OrgPlan uses the same idea as the PluginX ActiveX file. The file is packaged in a cabinet file along with a compiled help file (CHM). The file names are **OrgPlan32.OCX** and **OrgPlan32.CHM**. They are deployed to the Windows system folder the first time the user invokes a planning file.

When the OrgPlan function is first invoked, an HTM file, stored in by default in the profile directory for the user, (**C:\Documents and Settings\username.DOMAIN\_NAME\Local Settings\Application Data\PlanningCharts**), accesses a java script file with a file extension of .aqu using this command.

```
<p align="center"><SCRIPT SRC="OrgPlan for Published
Chart.aqu"></SCRIPT>
```

The .aqu file contains the codebase statement that behaves the same way as the PluginX.

```
document.write('codebase="http://www.aquire.com/codebase8/OrgPlan
_English.cab#Version=8,0,1546,1"');
```

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If the OrgPlan ActiveX is not registered, then a new CAB file is downloaded using the codebase URL.

If the OrgPlan ActiveX is registered, then the codebase function compares the version number that is registered with the version number in the codebase statement.

If the codebase statement version number is greater than the registered OrgPlan ActiveX, then a new CAB file is downloaded using the codebase URL.

If the codebase statement is the same or less than the registered OrgPlan ActiveX, then the chart is loaded using the existing registered OrgPlan ActiveX.

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# Other Publishing Options

## *Graphic*

This publishing option creates a single graphic file (JPEG) of the current chart view. Any program capable of displaying a graphic can view the graphic. No special implementation is necessary for this publishing option.

## *HTML*

This publishing option HTML files that point to graphic images of the org chart. Any web browser can view these HTML pages. No special implementation is necessary for this publishing option, and available functions are limited.

## *PDF*

This publishes to a PDF document for easy emailing and printing. It does require the free Adobe Reader to view the output. PDF

PDF publishing publishes in Book Style only.

A PDF "printer" must exist during PDF publishing. If a "PDF printer" does not exist, one is created prior to publishing, and then destroyed after publishing is complete. This extra process takes additional time.

If the "PDF printer" exists, then publishing PDF occurs at normal speed

This PDF printer can be permanently created using the program **PDFDRV.EXE**, which is installed during the installation of OrgPublisher.

PDF Printing Notes:

- In order to print from Thin Client, the PDF printer must exist. Choosing the Web Administration portion of the installation program creates this printer by default.
- If you are publishing to an IIS server that does not have OrgPublisher installed, and you want to print Thin Client then you must copy **PDFDRV.EXE** to the web server and execute it so that the web server will be able to print from Thin Client.

## *Mobile Device*

OrgPublisher supports 2 types of mobile devices (Personal Digital Assistant or PDA). Each device has specific implementation instructions, available from our web site.

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- Pocket PC – for implementation information see the Deployment Kit documentation available from our website: <http://www.aquire.com/products/mobile/PocketPC.html>.
- Palm – for implementation information see the documentation available from our website: <http://www.aquire.com/products/mobile/PalmOS.html>.

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