

**PeopleFluent OrgPublisher 23.01
Installation and Configuration Guide**

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Contents

Preface.....	3
Audience.....	3
Intent.....	3
Document Revision	4
Configuration Application Installation	5
Prerequisites.....	5
Installing the OrgPublisher Configuration Application.....	6
Next Steps.....	8
Creating an Administration Web App	9
Creating an Admin Web App	9
Next Steps.....	12
Creating Charting Web Apps	13
Creating a Charting Web App.....	13
Configure a Charting Web App.....	14
Next Steps.....	21
Configuring What-if Planning	23
What-if Planning Requirements	23
Enabling a Database Connection.....	23
Next Steps.....	25
Migrating Legacy HTML5 Charts.....	26
Migrating a Chart.....	26
Next Steps.....	32
Administrator Account Security	33
Limiting Login Attempts.....	33
Licensing.....	36
Licensing Information	36
Next Steps.....	39
Legal Notices	40

Preface

This document describes server requirements and end user browser requirements for the PeopleFluent OrgPublisher Administration and Charting web apps.

Audience

This guide is intended for the PeopleFluent OrgPublisher chart administrator, in conjunction with a server administrator with permissions to turn Microsoft Windows features on or off.

Intent

Administrators can use this document to:

- Install the PeopleFluent OrgPublisher Configuration Utility
- Create and configure the OrgPublisher Admin web app
- Create and configure Charting web apps
- Migrate legacy charts
- Configure and enable the database connection for What-If Planning
- Manage license keys

Administrative rights are required for installation. Consult your organization's IT department to ensure all company policies are followed when installing this application.

Document Revision

This section lists the initial publication and any changes or updates that follow.

Table: Revision Information

Revision Information	
Revision Date:	February 17, 2023
Revised Document Version Number:	1.0
Details of Revision:	Initial publication.

Configuration Application Installation

Prerequisites

Confirm you have the following prerequisites before installing PeopleFluent OrgPublisher:

- **Server Requirements:** See the PeopleFluent OrgPublisher 21.11 Hardware & Software Requirements.
- **Chart Data Files:** PeopleFluent OrgPublisher creates charts using your organization's data in comma-separated value (.CSV) format. Before running the installer, verify that you have these chart data source files and that they are available for upload. The What-if Planning feature requires secured HTML5 charts published with PeopleFluent OrgPublisher 11.15 Premier or later.

Charting Web App Formula Engine Requirements

- The PeopleFluent OrgPublisher Charting web app's formula engine is powered by VB.net instead of VBScript and is more strict when using some of the built-in date functions compared to the legacy desktop PeopleFluent OrgPublisher application. Administrators must configure charts being published for use in the Charting web app to meet the following requirements:
- Any formula calculating a number from a date using the CDate function needs to be modified to use a hyphen (-) instead of a forward slash (/) as a separator between month, day, and year values. For example, use 02-11-2018, not 02/11/2018, which would cause the CDate function to throw an error.
- Any formula requiring the current time must use the Now function as a replacement for the Date function.
- The Array function is not supported. Instead, declare and initialize an array using one of the techniques below:

<pre>Dim arr(3) arr(0) = "Lions" arr(1) = "Tigers" arr(2) = "Bears"</pre>	OR	<pre>Dim arr Dim delimStr = "Lions,Tigers,Bears" arr = Split(delimStr, ",")</pre>
---	----	---

Installing the OrgPublisher Configuration Application

To install the OrgPublisher Configuration Application

1. Using a web browser, download the OrgPublisher.exe file from the URL provided by PeopleFluent. Copy the file to your application server.
2. Open Microsoft Windows Explorer and navigate to the directory where you copied the file.
3. Double-click the OrgPublisher.exe file. The setup process initializes and then the OrgPublisher Setup dialog box appears.

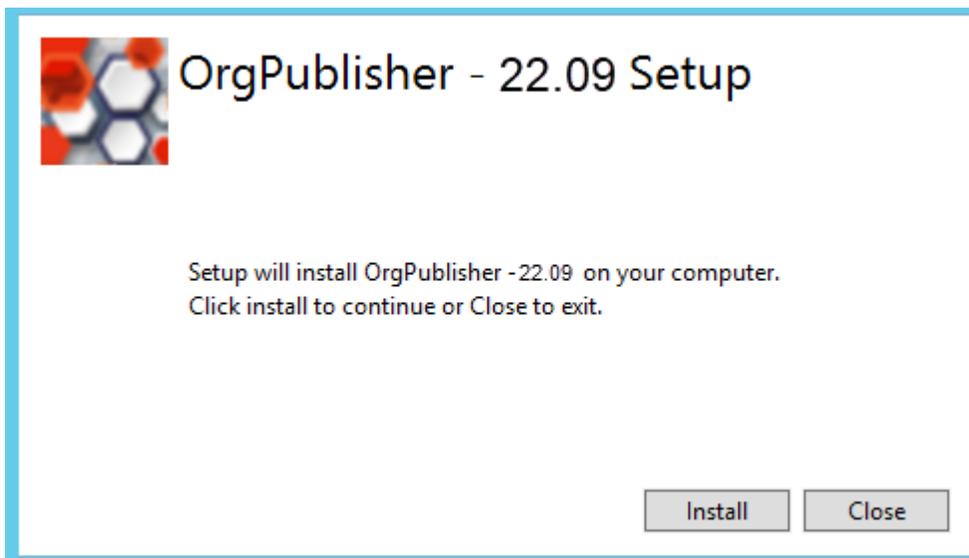


Figure: OrgPublisher Setup

4. Click Install. The Setup Wizard dialog box appears.
5. Click Next. The License Information dialog box appears.
6. Enter the Company Name provided with the license from PeopleFluent.
7. Enter the license key provided by PeopleFluent.
8. Click Next. The Destination Folder dialog box appears.
9. Click Next to accept the default destination, or click Change, select another folder, and then click Next. The Ready to install OrgPublisher dialog box appears.

10. Click Install. A progress dialog box opens. Once the installation is finished, the Completed dialog box appears.
11. Click Finish. The Setup Wizard exits and the Installation Successfully Completed dialog box appears.
12. Click Close. A new directory is created that contains the PeopleFluent OrgPublisher files. For example, in the default directory: C:\Program Files\PeopleFluent\OrgPublisher The PeopleFluent OrgPublisher Configuration application appears.

Note: The number of existing Charting web apps may affect the time required for the application to load.

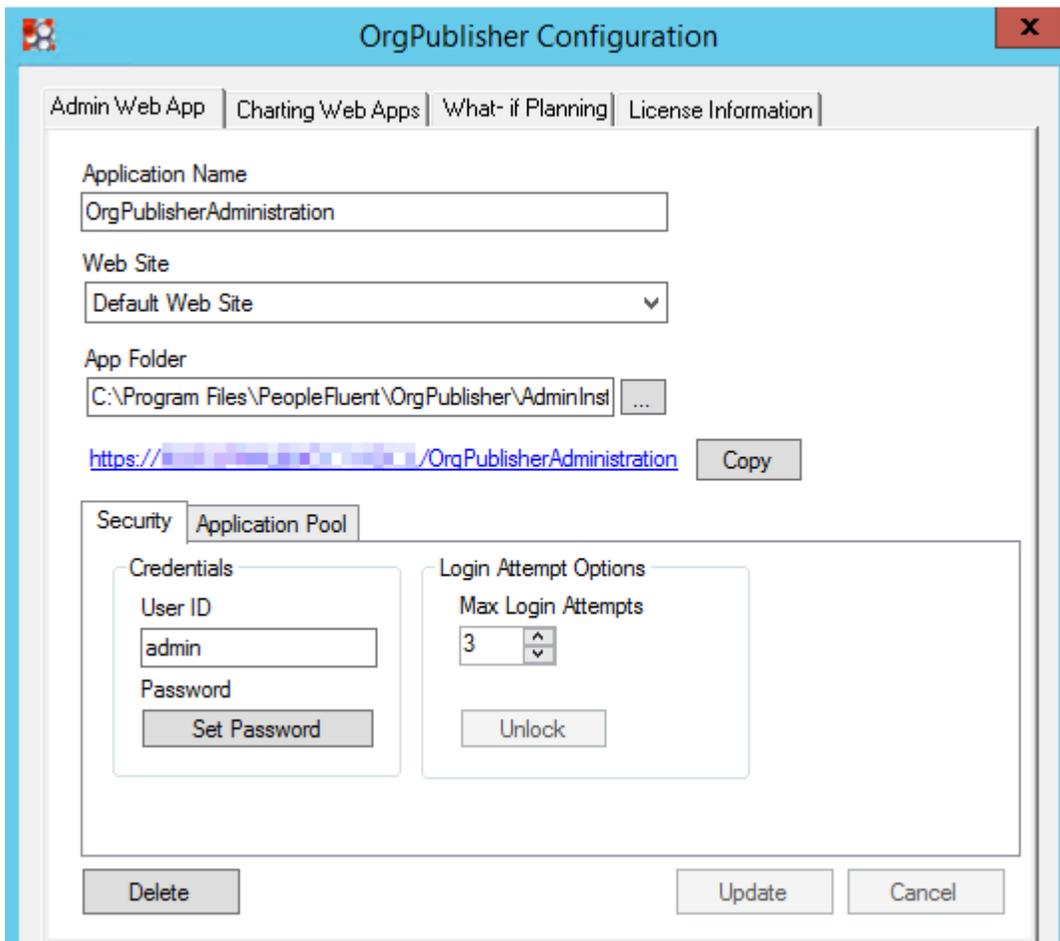


Figure: OrgPublisher configuration Application.

Next Steps

The PeopleFluent OrgPublisher Configuration Utility will be used to create an Admin web app for the OrgPublisher Charting web apps.

Creating an Administration Web App

The PeopleFluent OrgPublisher Configuration application allows the chart administrators to create an Admin web app and then manage the associated Charting web apps for their charts.

Creating an Admin Web App

An Admin web app has several parameters:

- **Application Name:** The name that will be used in the URL of the published charts.
- **Web Site:** The web site for the Admin web app created in Microsoft Internet Information Server (IIS). Use Microsoft IIS to define a new Web Site if that is required by your IT department.
- **App Folder:** The file path on the hard drive that will host the application files for the Admin web app.
- **Credentials:** The user ID and password used to access the Admin web app. Passwords must be 8-20 characters in length and contain at least one of each of the following character types: uppercase, lowercase, numeric, and special.
- **Login Attempt Options**
 - **Max Login Attempts:** The number of login retry attempts a user is allowed when trying to access the Admin web app before the account is locked and must be unlocked from this application. The default value is 3. Use 0 to disable this feature.
 - **Unlock:** Unlocks the login for the Admin web app after the admin account is locked due to too many failed login attempts.

- **Application Pool:** The application pool for the Admin web app, which is used to establish a level of isolation between the Admin web app and Charting web apps that contain sets of charts.
 - **Automatic App Pool Setup:** Use the default settings to configure IIS (recommended). This option creates an application pool for the Admin web app and assigns appropriate permissions to read and write related files.
 - **Custom App Pool Setup:** Allows for the creation of a new app pool or selection of an existing app pool from the drop-down list.

 Caution: A custom app pool should only be used if required by an organization’s IT department.

To create the Admin web app:

1. Open the PeopleFluent OrgPublisher Configuration application. The OrgPublisher Configuration window opens.

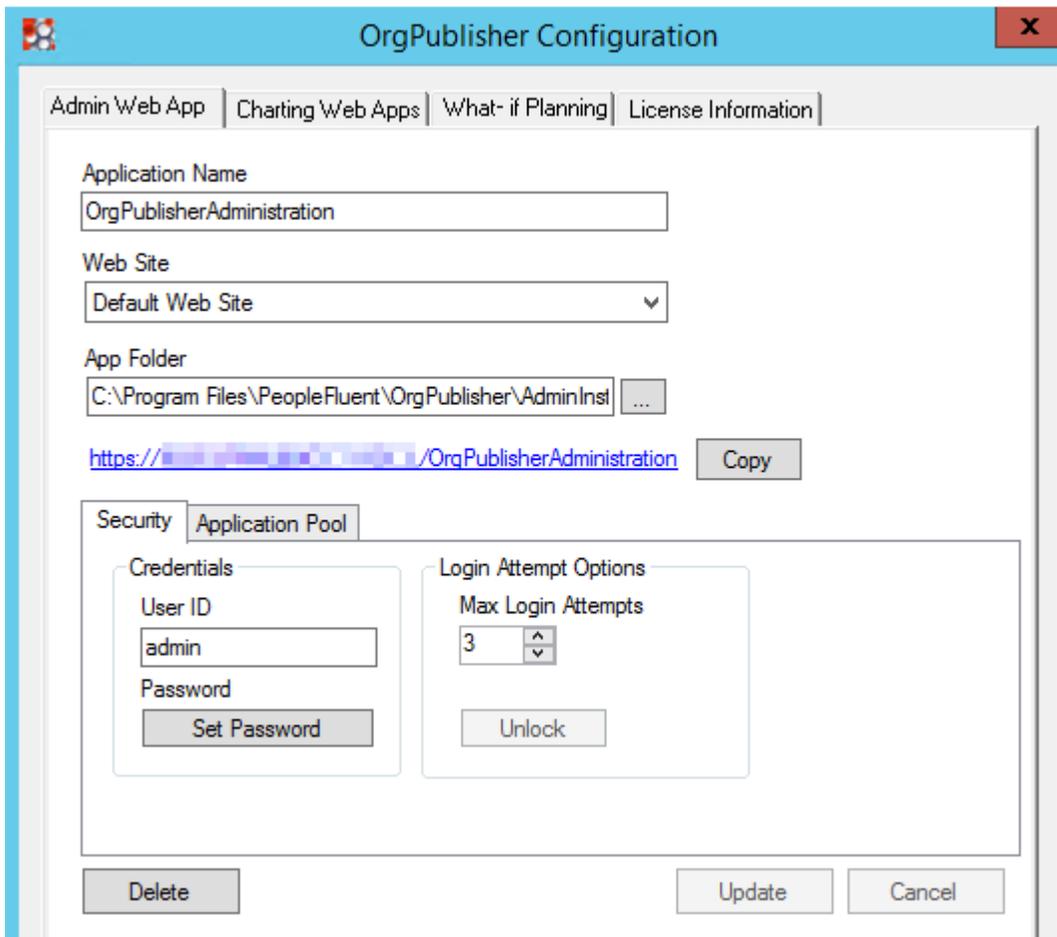


Figure: OrgPublisher Configuration Application.

2. Optionally, modify the following:
 - Application Name
 - Web Site
 - App Folder
3. Click Security.
4. In Admin Credentials, enter a User ID for the administrator account.
5. Click Set Password. The Enter password dialog box appears.

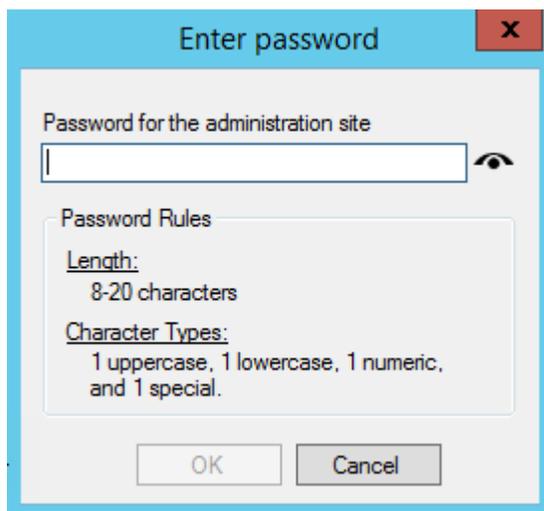


Figure: Enter Password

6. Enter a password that meets the rules outlined in the dialog box.
7. Click OK.
8. In Login Attempt Options, set the maximum number of login retry attempts.
9. Optionally, modify the Application Pool settings.

 **Caution:** A custom app pool should only be used if required by an organization's IT department. For more information, see [To create a custom app pool](#).

10. Click Create. A message appears confirming that the Admin web app has been created.
11. Click OK.

To create a custom app pool:

1. On the Application Pool tab, select Custom App Pool Setup.
2. Click Create New App Pool. The Add Application Pool dialog box appears.
3. Enter a name for the new app pool.
4. Click OK. The new app pool appears in the Custom App Pool Setup drop-down list.

 **Caution:** The PeopleFluent OrgPublisher Configuration Utility configures application pools it creates to set the Enabled 32-bit applications setting to False. Custom application pools created outside of the Configuration Utility must also have this HTML5 set to False. Otherwise, performance issues and error messages may occur.

Next Steps

Once an Admin web app has been created, administrators click Update if changes were made, then they are ready to configure Charting web apps.

Creating Charting Web Apps

The PeopleFluent OrgPublisher Configuration application allows the chart administrators to create and configure Charting web apps. The settings to configure a web app are organized across three tabs: General, App Pool, and Security.

Creating a Charting Web App

A Charting web app represents a published set of charts that will share an address (URL) and security mode. Each web app has three parameters:

- **App Name:** The name that will be used in the URL of the Charting web app.
- **Web Site For App:** The web site for the OrgPublisher Charting web app created in Microsoft Internet Information Server (IIS).
- **App Folder:** The file path on the hard drive that will host the application files for the Charting web app.

To create a new web app:

1. From the Windows Desktop, open the PeopleFluent OrgPublisher by double-clicking the **OrgPublisherConfiguration** shortcut that was created during installation.
2. Click Charting Web Apps.
3. Click Add. The Add Web App dialog box appears.

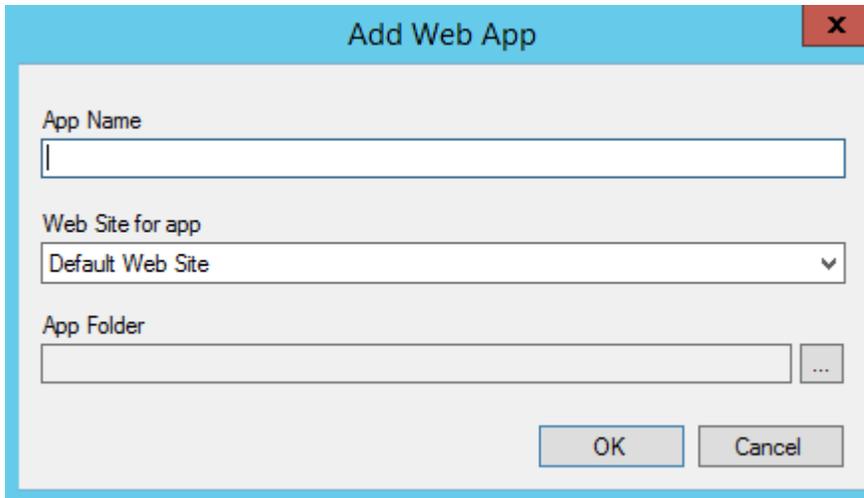


Figure: Add Web App

4. Enter an **App Name**. Avoid using special characters and spaces.
5. Select the **Web Site for app**. The Default Web Site is recommended for most users. Use Microsoft IIS to define a new Web Site if that is required by your IT department.
6. PeopleFluent recommends using the App Folder path automatically created by the PeopleFluent OrgPublisher based on the Web App Name.
7. Click OK.

Configure a Charting Web App

After creating an OrgPublisher Charting web app, an administrator then configures the Charting web app via settings on the General, App Pool, and Security tabs.

General

The General tab allows administrators to set the web app location, display options, and log level.

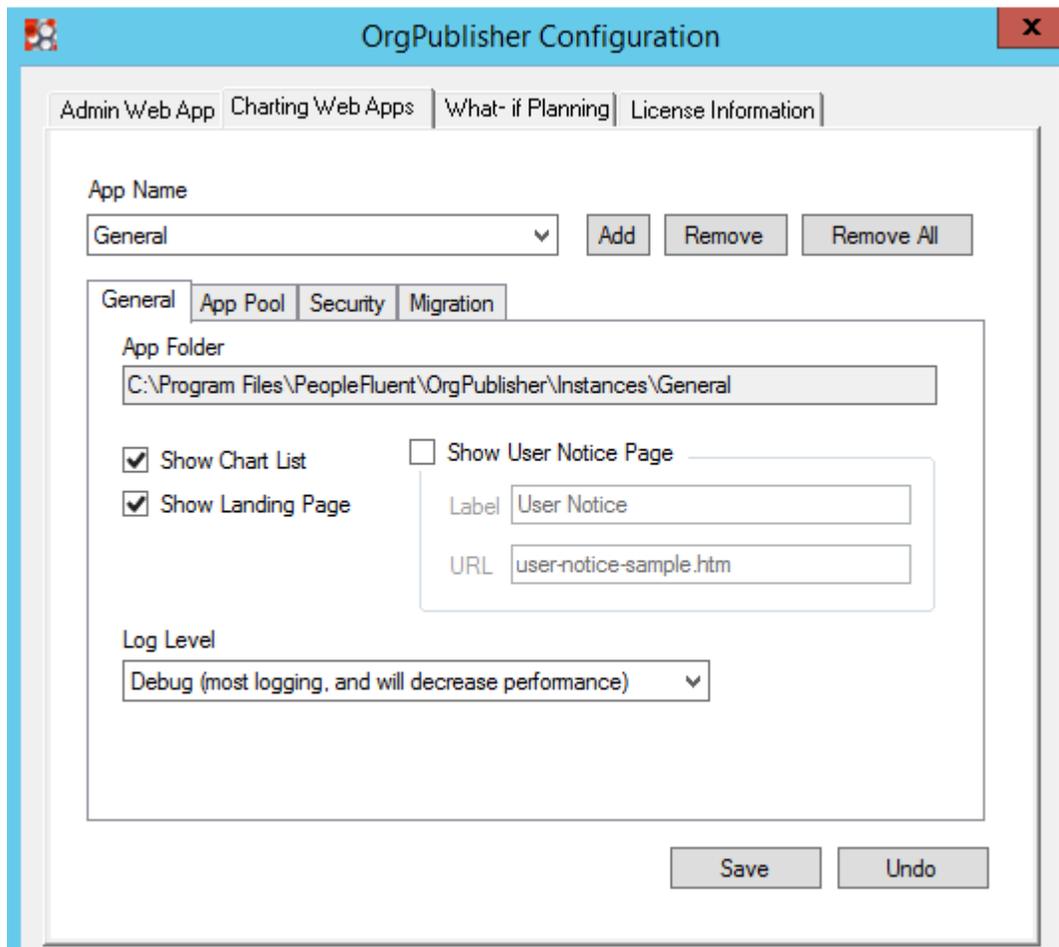


Figure: General Tab

- **Web App Folder:** This read-only field displays the file path for the directory that will host the application file for the web app. The default location is: C:\Program Files\PeopleFluent\OrgPublisher\Instances\web_app_name.
- **Show Chart List:** When selected, the OrgPublisher Charting web app displays a list of charts. This list appears in the toolbar on the far left side of the application. This option is enabled by default.

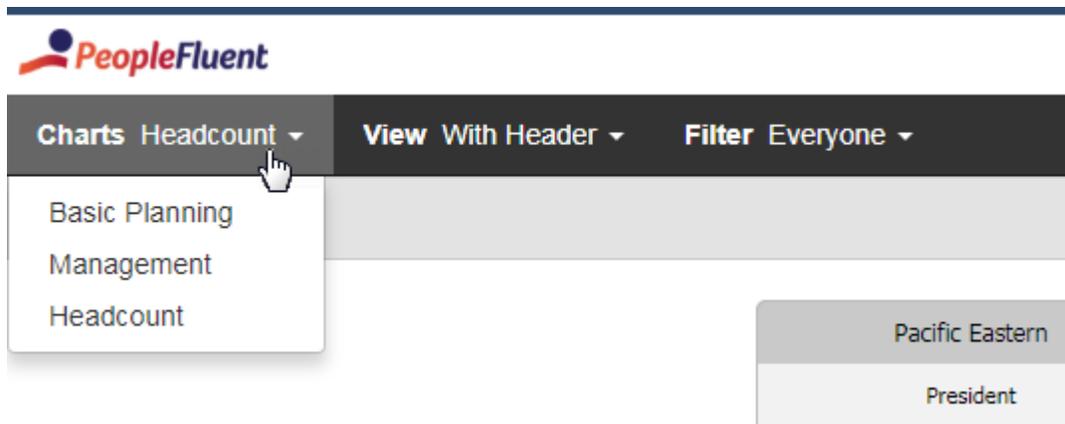


Figure: Chart List

- Show Landing Page: When selected, a landing page displays a list of available charts, similar to the list from the Show Chart List option, but allows the user to select a chart. This option is not enabled by default and the page is not configurable. To access a landing page, go to: http://server_name/web_app_name/.



Figure: Landing Page

- **Log Level:** Sets the amount and type of information that is captured in the application log file without affecting its functionality. The Information (default) level should be adequate unless a PeopleFluent support representative recommends changing it.

App Pool

PeopleFluent OrgPublisher uses application pools to establish a level of isolation between Charting web apps that contain sets of charts. For example, one app pool could be used for a web app with unsecured charts which allow all employees access where another app pool could be used for a web app with secured charts intended for a specific group of users such as the Executive team.

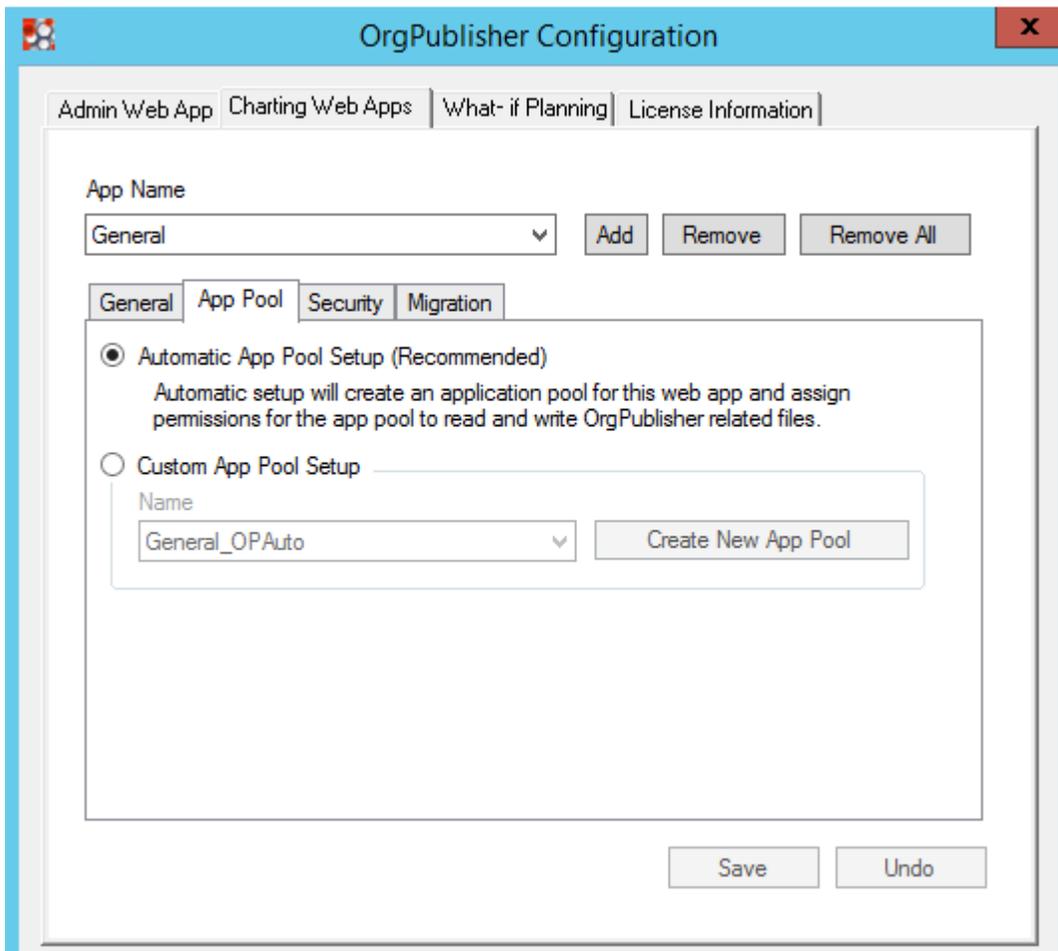


Figure: App Pool Tab

- **Automatic App Pool Setup:** Use the default settings to configure IIS (recommended). This option creates an application pool for this web app and assigns permissions to read and write Charting web app-related files.
- **Custom App Pool Setup:** Allows for the creation of a new app pool or selection of an existing app pool from the drop-down list.

 **Caution:** A custom app pool should only be used if required by an organization's IT department.

To create a custom app pool:

1. Click App Pool.
2. Select Custom App Pool Setup.
3. Click Create New App Pool. The Add Application Pool dialog box appears.
4. Enter a name for the new app pool.
5. Click OK. The new app pool appears in the Custom App Pool Setup drop-down list.

 **Caution:** The PeopleFluent OrgPublisher Configuration Utility automatically configures application pools to set the Enabled 32-bit applications HTML5 to False. Custom application pools created outside of the Configuration Utility must also have this HTML5 set to False. Otherwise, performance issues and error messages may occur.

Security

The Security tab allows administrators to configure security for all charts published within a web app:

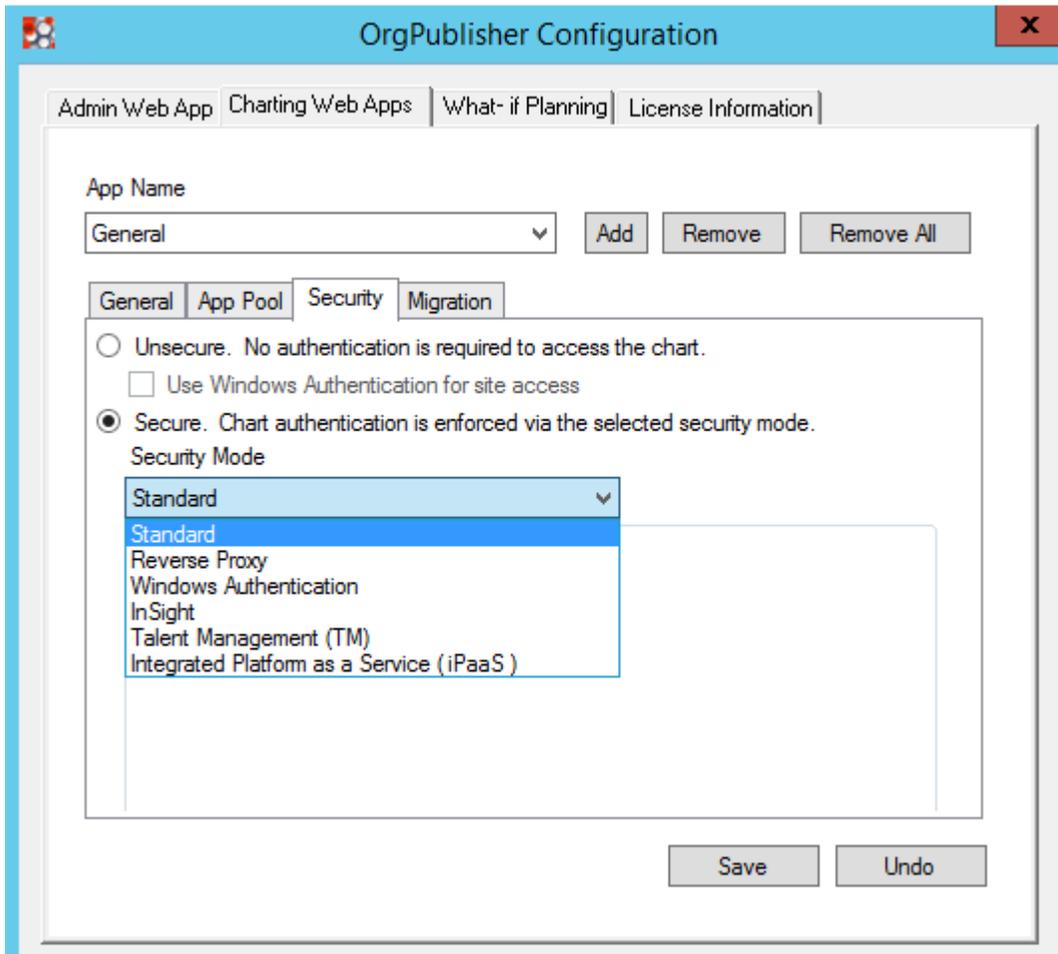


Figure: Security Tab

- **Unsecure:** Allows access to charts without user authentication. This is the default setting.

i Note: Select Unsecure to use Windows Authentication for site access if using unsecured charts but securing access to the charts via Windows Authentication. For more information, see the following link: <https://docs.microsoft.com/en-us/iis/configuration/system.webServer/security/authentication/windowsAuthentication/>

- **Secure:** Allows access to charts only with authentication using the selected Security Mode. For more information, see Security Modes. For more information, see **Security Modes** below.

⊘ Caution: The security type selected here must be compatible with the security type of the Charting web app.

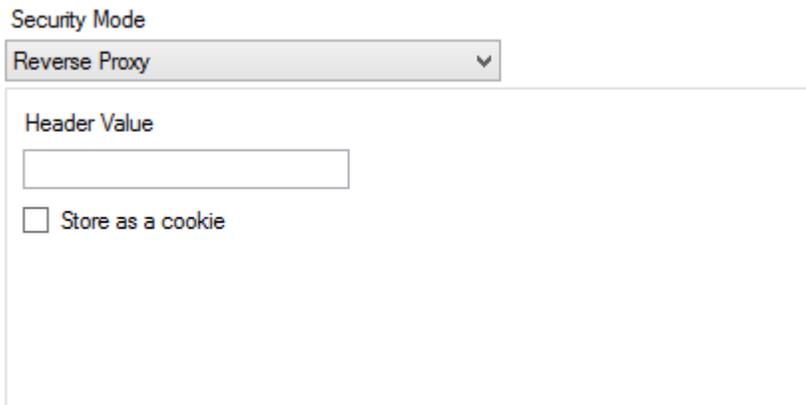
Security Modes

If Secure is selected, then an administrator must choose one of the following security modes for the Charting web app:

- **Standard:** Requires no additional settings.
- **Reverse Proxy**

 **Caution:** The following settings must be the same values as those the administrator set when publishing the chart in OrgPublisher's Reverse Proxy Settings.

- **Header Value:** (Required) Contains the name of the HTTP header item that will contain the User ID expected by the OrgPublisher Charting web app.
- **Store as a cookie:** Allows for the header value to be stored as a cookie in the user's browser.



The screenshot shows a configuration window for Security Mode. At the top, there is a dropdown menu labeled "Security Mode" with "Reverse Proxy" selected. Below this, there is a section titled "Header Value" containing an empty text input field. Underneath the input field is a checkbox labeled "Store as a cookie", which is currently unchecked.

Figure: Security Mode: Reverse Proxy

- **Windows Authentication**

 Caution: The following settings must be the same values as those the administrator set when publishing the chart in OrgPublisher’s Windows (Active Directory) Authentication.

- **User ID Format:** (Required) Supports the following formats:
 - User ID only (Default)
 - Domain\User ID



Figure: Security Mode: Windows Authentication

The following security modes are for use by PeopleFluent personnel:

- **InSight**
- **Talent Management (TM)**
- **Integrated Platform as a Service (iPaaS)**

For more information about these options, contact your PeopleFluent representative.

Next Steps

Once administrators have created a Charting web app, they can click Save and then:

- Configure What-If Planning. For more information, see [Configuring What-if Planning](#).
- Migrate an existing HTML5 chart from a legacy version of PeopleFluent OrgPublisher. For more information, see [Migrating Legacy HTML5 Charts](#).

- Create new charts using the Admin web app. To access the site, click the link on the Admin Web App tab.

Configuring What-if Planning

Chart administrators must enable a database connection in the PeopleFluent OrgPublisher Configuration application to use What-If Planning. This chapter provides the prerequisites and instructions for enabling a database connection.

What-if Planning Requirements

What-If Planning in PeopleFluent OrgPublisher requires the following:

- PostgreSQL 10.0 or later
- A valid connection to a PostgreSQL database

Enabling a Database Connection

The database connection for What-if Planning requires the following information:

Table:

Parameter	Description
Host	The host machine name or IP address
Port	The port for the database.
Superuser username	The username to connect to the database
Password	The superuser account's password. This value is not stored.

To establish a database connection:

1. In the PeopleFluent OrgPublisher Configuration application, click What-if Planning.
2. Select Enable Database Connection.
3. Enter the PostgreSQL database details.

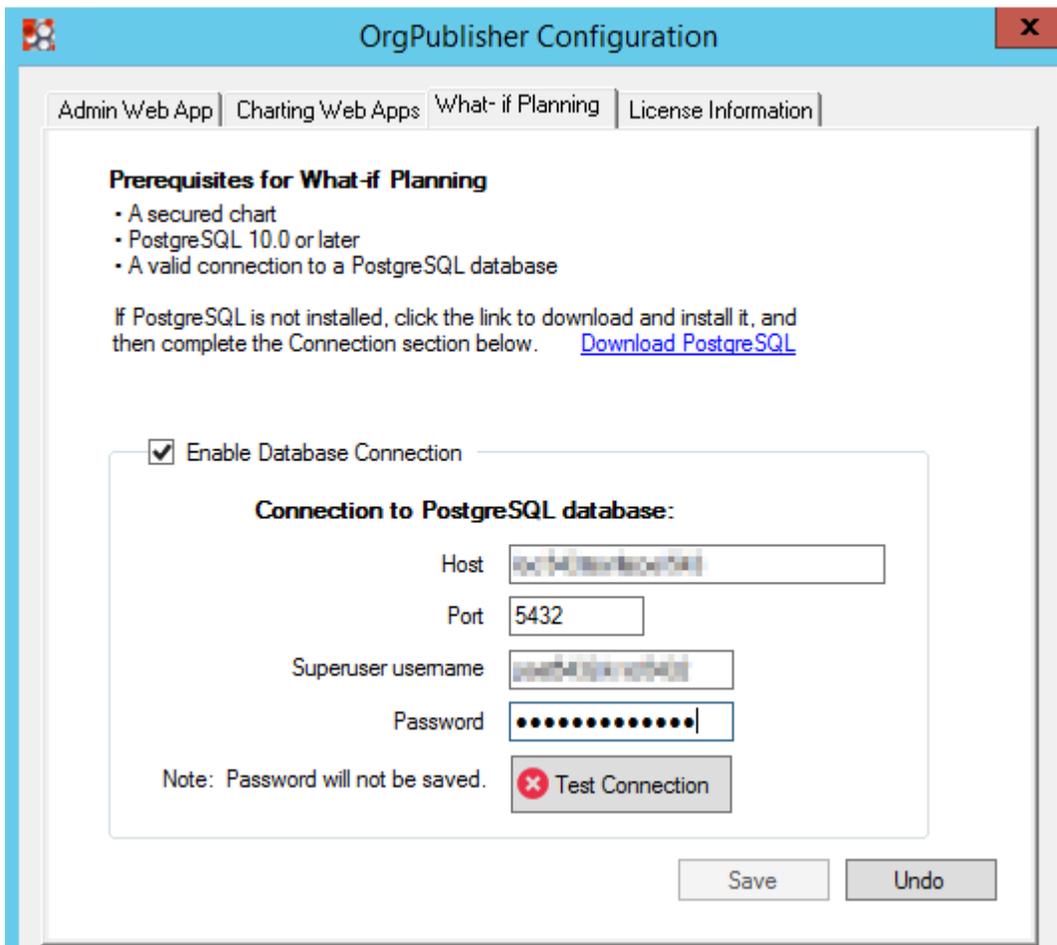


Figure: Enable Database Connection

4. Click Test Connection. If successful, the icon on the Test Connection button changes to a check mark.

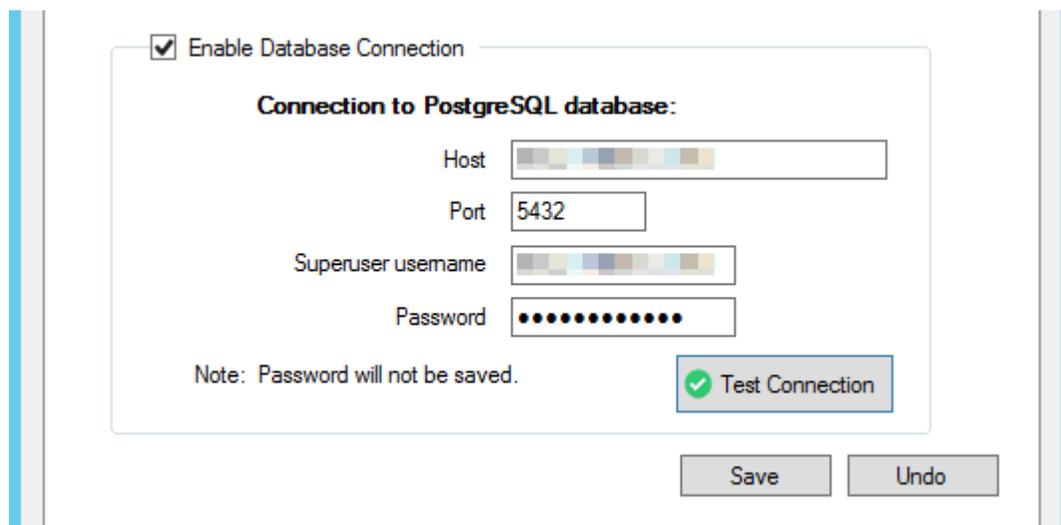


Figure: Valid Connection

5. Click Save. If successful, a Configuration Saved dialog appears.
6. Click OK.

Next Steps

Once administrators have enabled and tested a database connection, they are ready to configure secured charts for What-If Planning using the Administration site. To access the site, click the link on the Admin Web App tab.

Migrating Legacy HTML5 Charts

The PeopleFluent OrgPublisher Configuration application allows chart administrators to migrate published HTML5 charts from the legacy desktop version of PeopleFluent OrgPublisher into a Charting web app.

Migrating a Chart

The Migration tab on the Charting Web Apps page has two sections:

- Legacy HTML Publish Folder: Defines the file path to the Data folder of the published charts being migrated. For more information, see Finding the HTML5 Publish Folder on page 20.
- Charts: Lists the published legacy HTML5 charts available for migration. When a path to a folder with published charts is entered, a list of valid HTML5 charts and their security modes displays. Only charts that have been published with the same security mode as the selected Charting web app can be migrated.

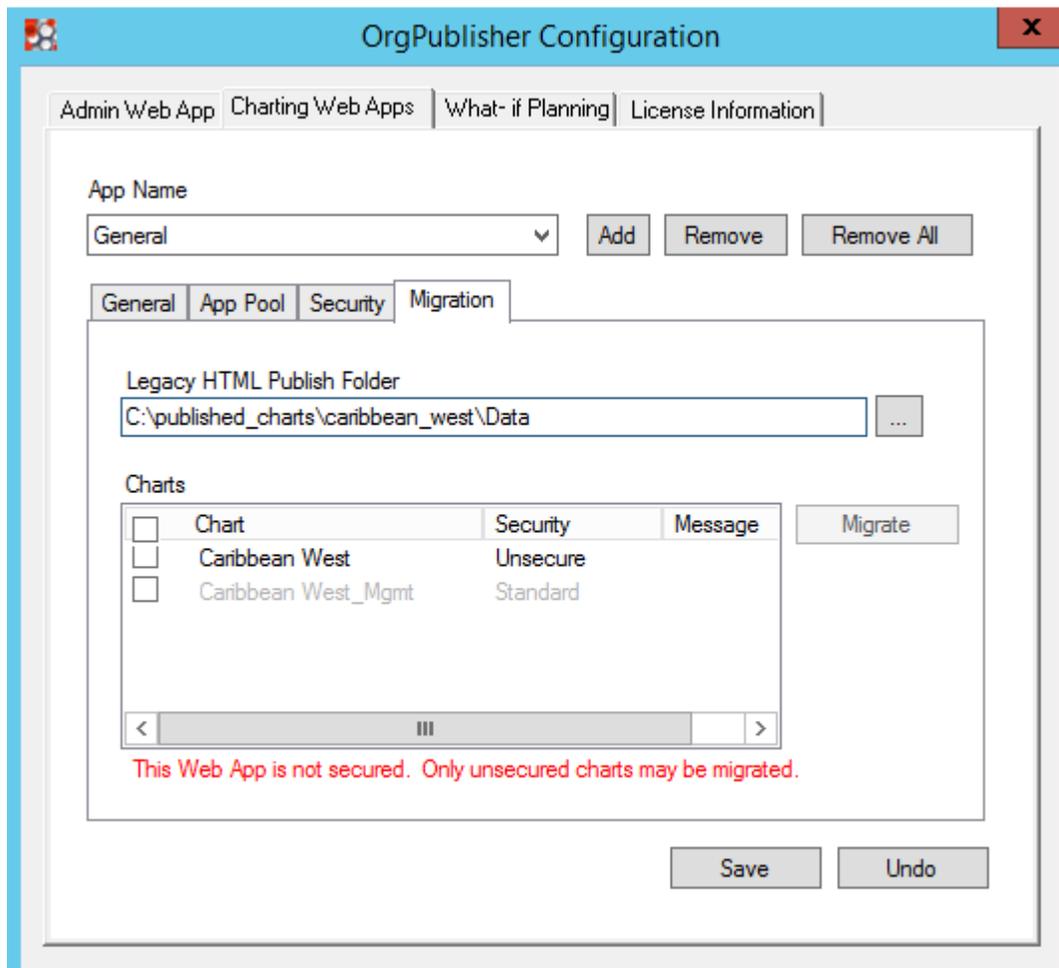


Figure: Migration Tab

Finding the HTML5 Publish Folder

You can copy the published folder location from the HTML5 Publishing Summary dialog in the legacy desktop application, however you must append \Data for this HTML5 to be valid. For example, if the dialog shows the following path:

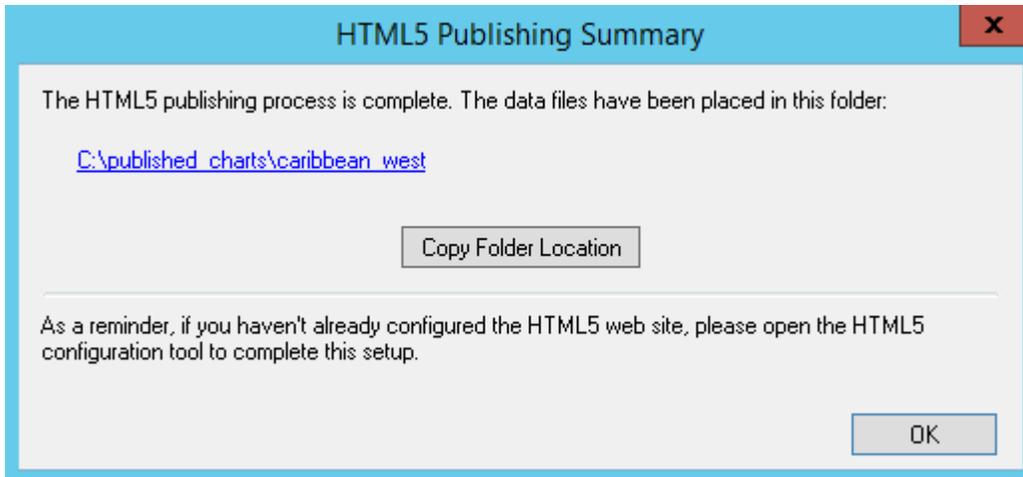


Figure: HTML5 Publishing Summary

The path you need to provide for the **Legacy HTML Publish Folder HTML5** is:

C:\published_charts\caribbean_west\Data

Limitations

The following items are not migrated from legacy charts:

- **9-boxes:** These can be recreated using the Talent Grid feature in the Admin web app.
- **Graphs:** These can be recreated using the Graphs feature in the Admin web app.
- **Photo locations that use a local or UNC file path:** The photos must be moved to a server location that is accessible via a web URL, then the chart's Photo Base Path HTML5 can be set to that location.

Additionally, interactive modeling is not supported in PeopleFluent OrgPublisher 21.11, therefore migrated modeling charts are viewable, but not editable.

Migrated Chart and Data Source Names

Migrated charts and data sources are named using the chart's published name truncated to allow `_MIGRATED` to be appended to it.

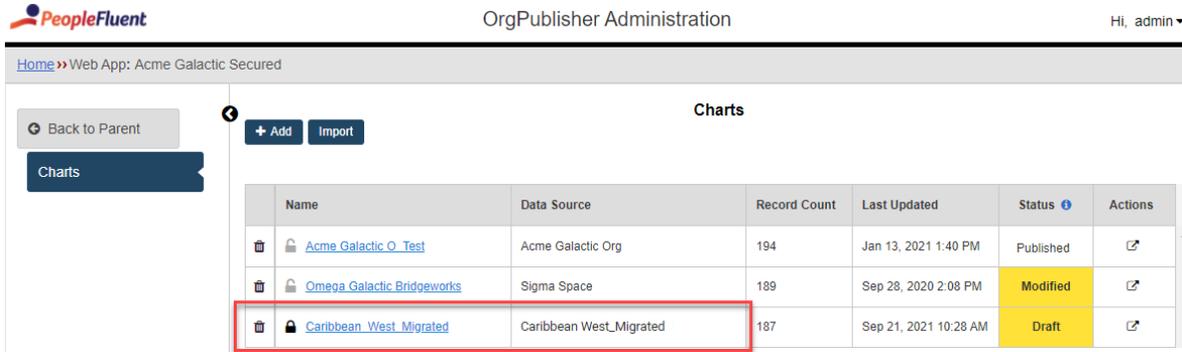


Figure: Chart and Data Source Migrated from a Legacy Chart

If a chart administrator migrates a legacy chart into a Charting web app with the same name as an existing migrated chart, the existing migrated chart and its data source are preserved and the newly migrated chart and data source have `_MIGRATED` appended to their names with a number incremented to create unique names.

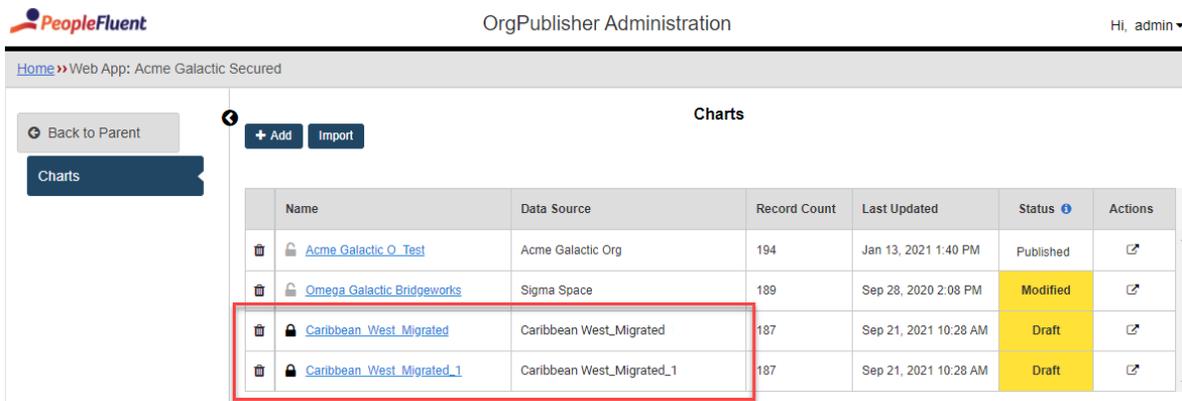


Figure: Example of a Chart Migrated with the Same Name

To migrate a published HTML5 chart:

1. From the Windows Desktop, open the PeopleFluent OrgPublisher by double-clicking the OrgPublisherConfiguration shortcut that was created during installation.
2. Click **Charting Web Apps**.
3. Select the name of the Charting web app into which you want to migrate the chart.
4. In Legacy HTML Publish Folder, click Browse and navigate to the Data folder of published chart. The list of charts automatically populates when a valid chart is located.
5. In Charts, select charts with the same security as the Charting web app, that you want to migrate. Charts that do not have the same security setting cannot be selected.

6. Click Migrate. A dialog appears with information about the migration process.

When finished, the Charts section lists the status of each chart's migration:

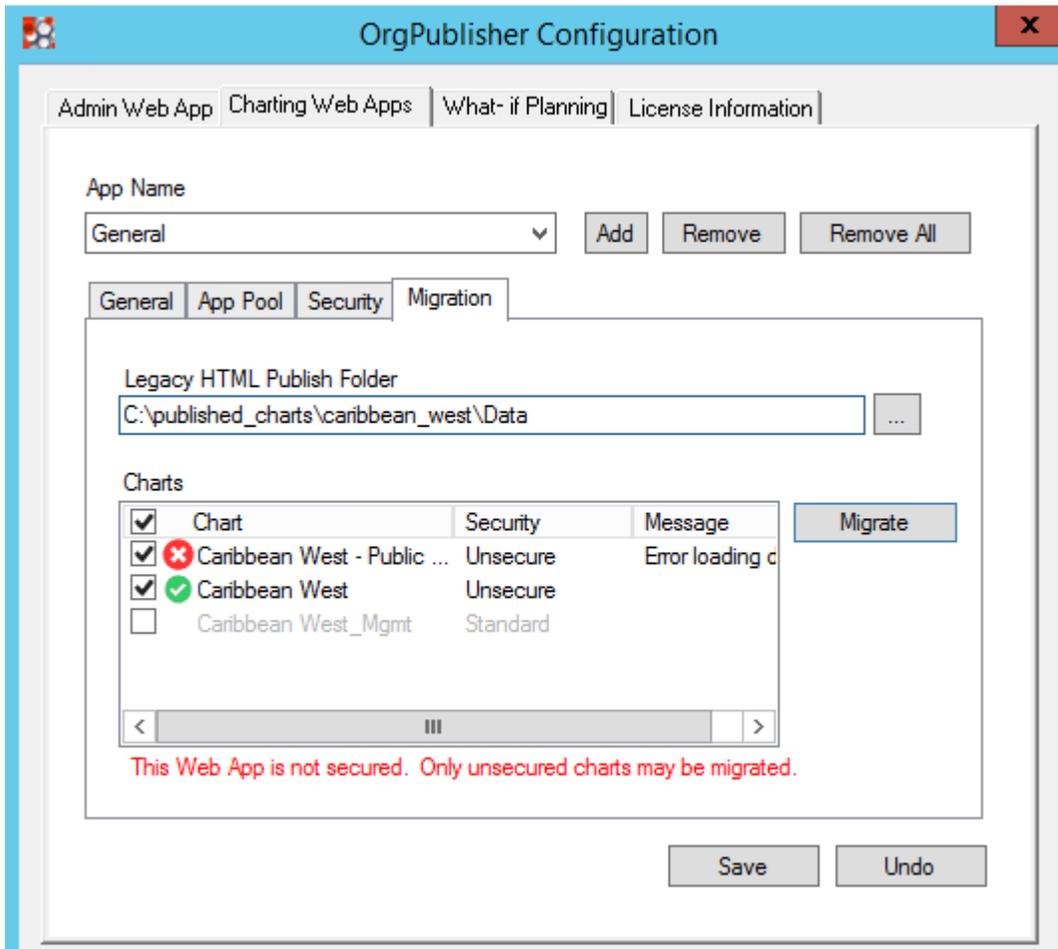


Figure: Migration Status

7. If the migration was successful, log into the Admin web app. Otherwise, go to Troubleshooting Errors below.
8. Go to the web app into which you migrated the legacy charts.
9. Confirm that the migrated charts are listed.

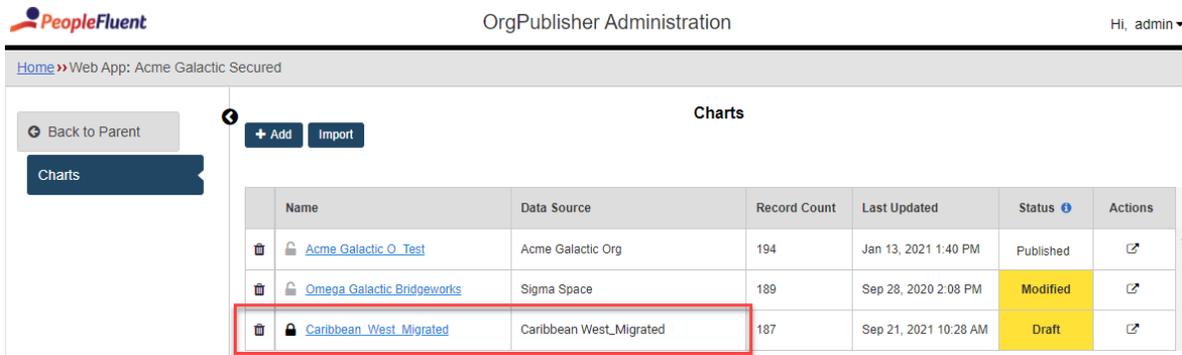


Figure: Chart and Data Source Migrated from a Legacy Chart

You are now ready to begin configuring the migrated charts.

Troubleshooting Errors

If a migration fails, check the OrgPublisher Configuration log file for the error messages shown in the table below. The log file is in the PeopleFluent OrgPublisher installation directory: C:\Program Files\PeopleFluent\OrgPublisher\PF.WPA.OrgPubConfig.log

Table: Migration-related Errors and Potential solutions

Error	Potential Solution
Error Error loading data for chart '<chart name>'. Message: Cannot read that as a ZipFile	Republish the chart from the legacy PeopleFluent OrgPublisher desktop application, then repeat the migration process.
Error Error loading data for chart '<chart name>'. Message: File in use by another process	Close all instances of the legacy PeopleFluent OrgPublisher desktop application, then repeat the migration process.

Next Steps

After verifying the migration was successful, chart administrators may want to perform the following post-migration configuration tasks:

- Rename the chart and data source.
- Configure Talent Grids if the migrated charts used 9-boxes. For more information, search for Talent Grid in the Admin web app online help.
- Configure Graphs that were not migrated with charts. For more information, search for Graphs in the Admin web app online help.
- Assign User ID and Password Fields on secure charts. For more information, search for Security in the Admin web app online help.
- Move photos that used a local file path for photos to a location accessible via a web server and update the **Photo Base Path** setting on the General tab of the chart in the Admin web app.

Administrator Account Security

In addition to password security, PeopleFluent OrgPublisher provides an additional level of security for the Admin web app.

Limiting Login Attempts

Administrators can use the Max Login Attempts setting to limit the number of login retry attempts a user can make to the Admin web app.

When a user exceeds this number, the following error message appears:

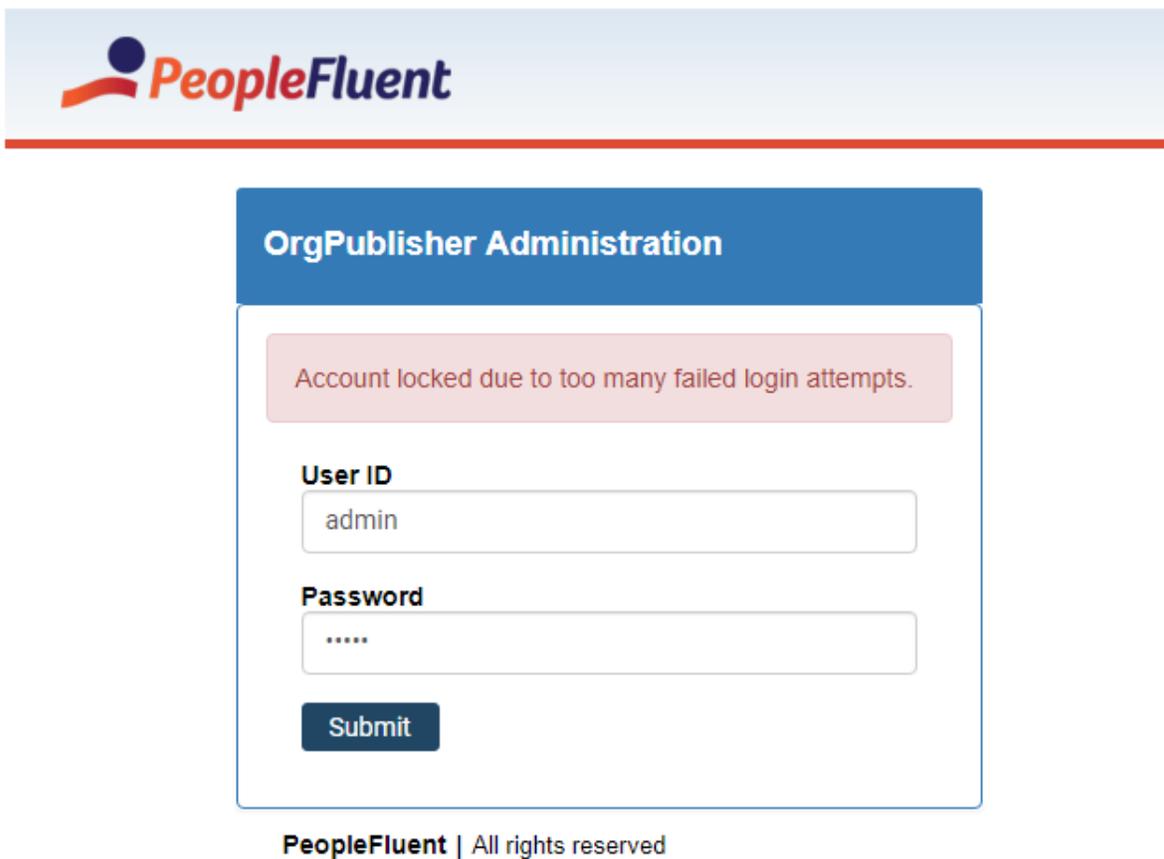


Figure: Admin Web App Account Locked

The administrator must unlock the account in the OrgPublisher Configuration application:

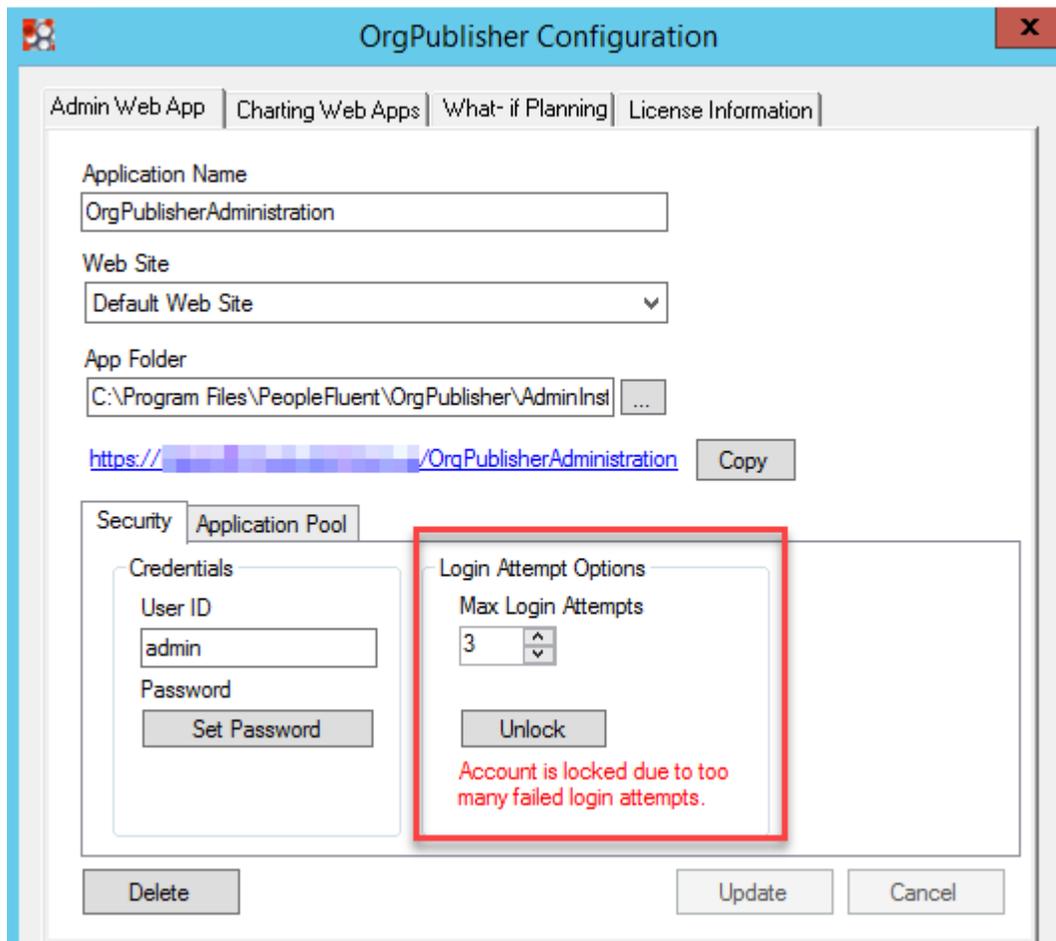


Figure: OrgPublisher Configuration Application

i Note: If the OrgPublisher Configuration application is open when a chart administrator exceeds the maximum number of login attempts, you must exit and restart the application to see the enabled Unlock button.

To unlock the administrator account:

1. Open the PeopleFluent OrgPublisher Configuration application. The OrgPublisher Configuration window opens.
2. Click Security.
3. In Login Attempt Options, click Unlock.
4. Click **Update**. A confirmation dialog appears.
5. Click **OK**.

i Note: The user needs to refresh their browser before the error will clear from their browser and they will be able to attempt to log in again.

To change the maximum number of login retry attempts:

1. Open the PeopleFluent OrgPublisher Configuration application. The OrgPublisher Configuration window opens.
2. Click Security.
3. In Login Attempt Options, change the value of the **Max Login Attempts** setting.
4. Click **Update**. A confirmation dialog appears.
5. Click **OK**.

i Note: The user needs to refresh their browser before the number of allowed login retry attempts will match the new value.

To disable maximum number of login retry attempts:

1. Open the PeopleFluent OrgPublisher Configuration application. The OrgPublisher Configuration window opens.
2. Click Security.
3. In Login Attempt Options, change the value of the **Max Login Attempts** setting to 0.
4. Click **Update**. A confirmation dialog appears.
5. Click **OK**.

i Note: The user needs to refresh their browser before the limit on the number of allowed login retry attempts will be disabled.

Licensing

The PeopleFluent OrgPublisher Configuration application allows the chart administrators to enter their organization's license key when upgrading or extending a trial. Contact your PeopleFluent representative if you need your organization's license information.

Licensing Information

The License Information tab lists:

- **Key:** The license key provided by PeopleFluent.
- **Company name:** The organization to whom the license is granted. This value must match the name used by PeopleFluent when the license key was generated.
- **Maximum position count:** The number of positions allowed in a chart by this license.
- **Expiration date:** The date on which the license expires. For more information, see License-related Errors on page 30.

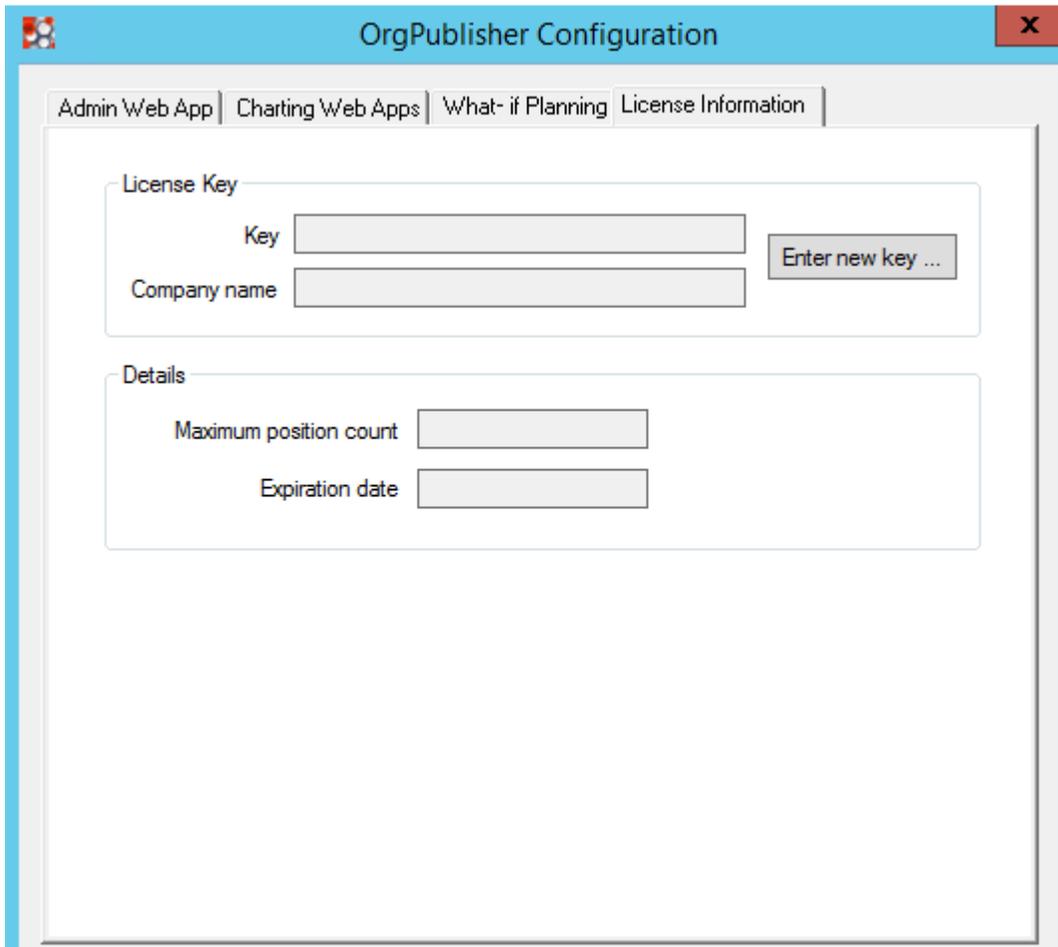


Figure: License Information

To enter a license key

1. From the Windows Desktop, open the PeopleFluent OrgPublisher by double-clicking the **OrgPublisherConfiguration** shortcut that was created during installation.
2. Click License Information.
3. Click Enter New Key. The License Key Entry dialog box appears.



Figure: License Key Entry

4. Enter the license key provided by PeopleFluent.
5. Enter the Company Name provided with the license from PeopleFluent.
6. Click **OK**. A dialog appears indicating that the license is valid.
7. Click **OK**. The Licensing Information tab is updated with the license key and related data.

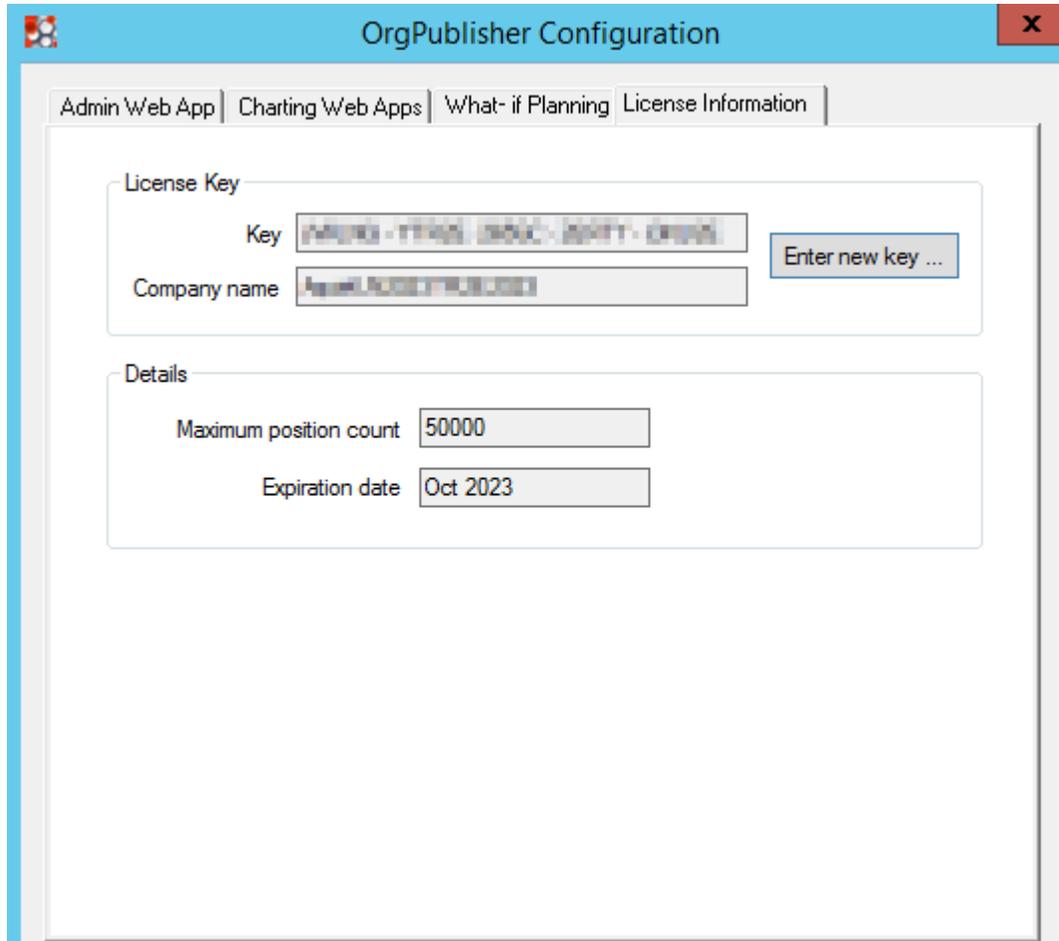


Figure: Updated License Information

License-related Errors

There are two types of license-related errors: license expired and position count limited.

License Expired

When a license expires, the Admin web app displays a notification and prevents administrators from making any changes. Chart users will also see a notification until the chart administrator enters an active license key.

An expired license disables automatic data source updates and causes all linked Charting web apps to serve a cached version of the data created when the web app started. Therefore, when a license is expired, the Charting web app displays a notification indicating that users may be viewing stale data.

Position Count Limited

If an administrator creates a chart that exceeds the maximum position count permitted by the license, the Charting web app displays a notification that the position count displayed has been limited due to licensing and users may be viewing an incomplete chart.

Next Steps

Once administrators have entered an active license key, they can:

- Migrate an existing HTML5 chart from a legacy version of PeopleFluent OrgPublisher. For more information, see [Migrating Legacy HTML5 Charts](#).
- Create new charts using the Admin web app. To access the site, click the link on the Admin Web App tab.

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