



10OrgChart

Installation Manual

Version 4.3.0

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1 Introduction

The 1OrgChart for SharePoint 2007 web part lets you create organisational and departmental charts using people information pulled from SharePoint's User Profiles or a custom SharePoint list.

This installation manual is intended for SharePoint Administrators installing the 1OrgChart web part on a Microsoft Office SharePoint Server 2007 or Windows SharePoint Server 3.0 server farm.

2 Installation Requirements

Before proceeding with the 1OrgChart web part installation, please ensure the following requirements are met.

2.1 Recommended Hardware

Performance of 1OrgChart may vary depending on the available resources. The following hardware is a guide and may vary depending on the number of people within your organisation.

- Web front-end servers and Application servers
 - Minimum Dual 2.8 GHz Pentium 4 CPU
 - Minimum 2Gb RAM
- Database servers
 - Minimum Dual 2.8 GHz Pentium 4 CPU
 - Minimum 2Gb RAM

2.2 Software Requirements

The following software MUST be installed on the server farm before proceeding with the installation.

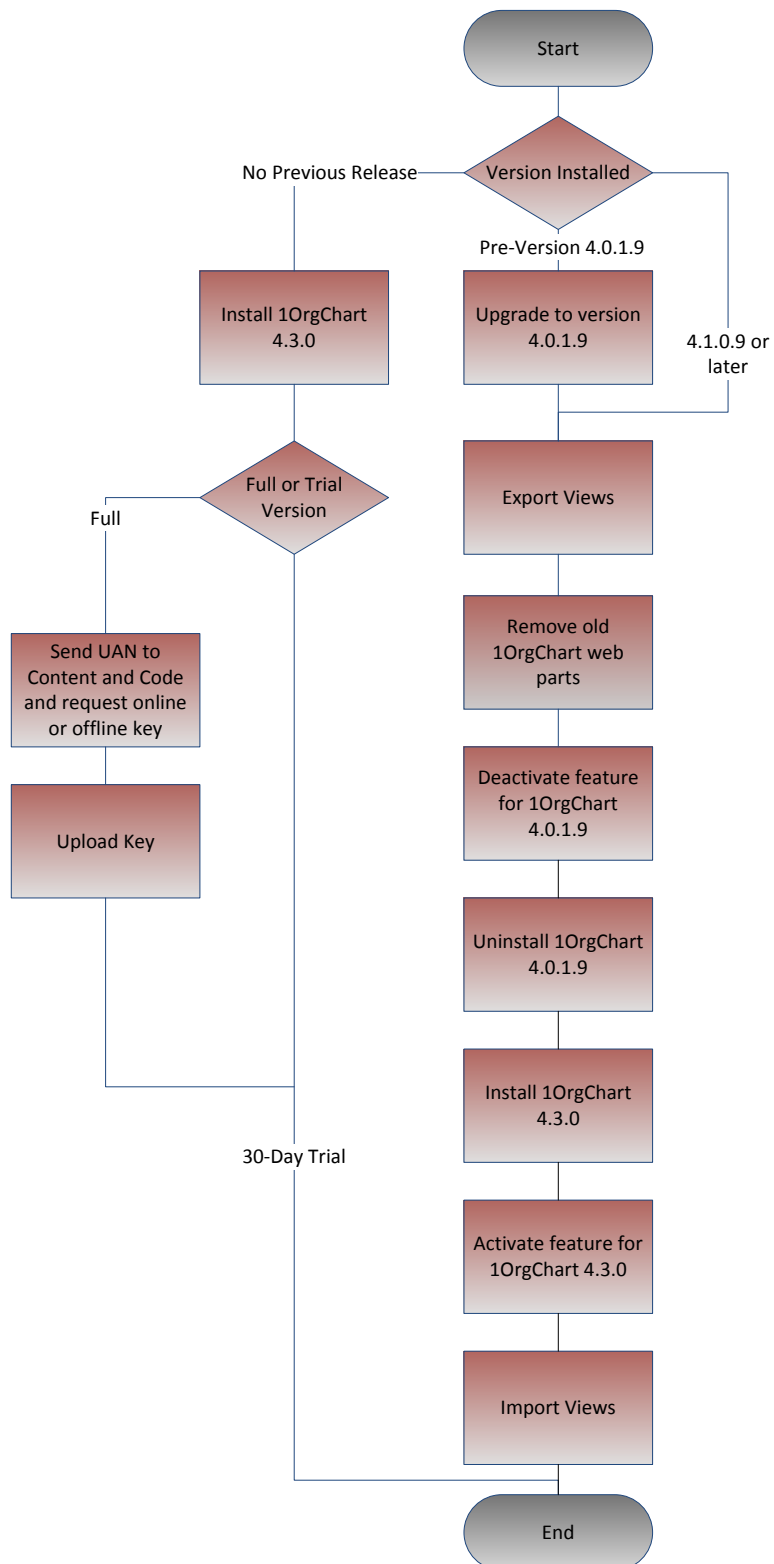
- Microsoft Office SharePoint Server 2007 SP1 (Standard or Enterprise) or Windows SharePoint Servers 3.0 SP1
- Microsoft Internet Information Services (IIS) 6.0 or later
- Internet Explorer version 5.5 with Service Pack 2 or later
- .NET 3.5 Service Pack 1 or ASP.NET

2.3 Permissions

The following permissions are required to complete all the steps outlined in this installation manual.

- Member of the local administrators group on the server where the setup wizard is run.
Required to complete the installation only.
- Farm Administrator with rights to add solutions and manage solutions deployment.
Required during installation and to upload/manage license keys in License Manager in order to activate a product licenses.
- SSP Administrator with rights to modify search settings.
Required to create a new Managed Property, initial crawls and update the search scope.
- SSP Administrator with rights to manage user profiles.
Required to create a new Managed Property and import user profiles.
- A site collection administrator on the site collection where the product will be installed.
Required to activate the Site Collection Feature.

3 Installation and upgrade process



4 Pre-Installation

4.1 Enable Session States

It is recommended that **Session States are enabled** in order to recall modified views in 1OrgChart. By default, Session States are enabled. To check whether Session States are enabled please refer to the following Microsoft TechNet article.

<http://technet.microsoft.com/en-us/library/cc263527.aspx>

4.2 Search Settings

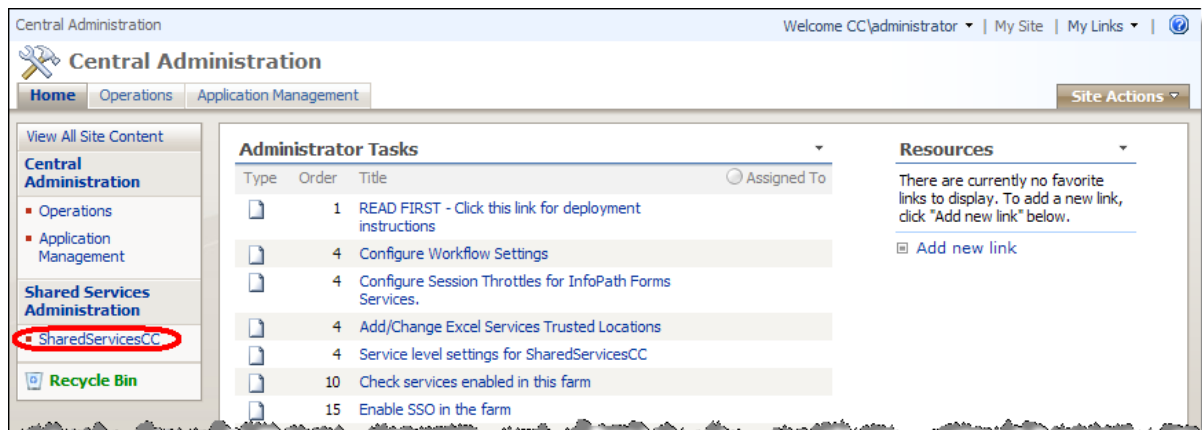
1OrgChart uses SharePoint's search results to create organisational charts for your people. This section outlines the steps required to configure search for 1OrgChart.

Important This section applies to servers running Microsoft Office SharePoint Server 2007. For servers running Windows SharePoint Services 3.0 only, please skip this section and proceed to section 5 **Install 1OrgChart**

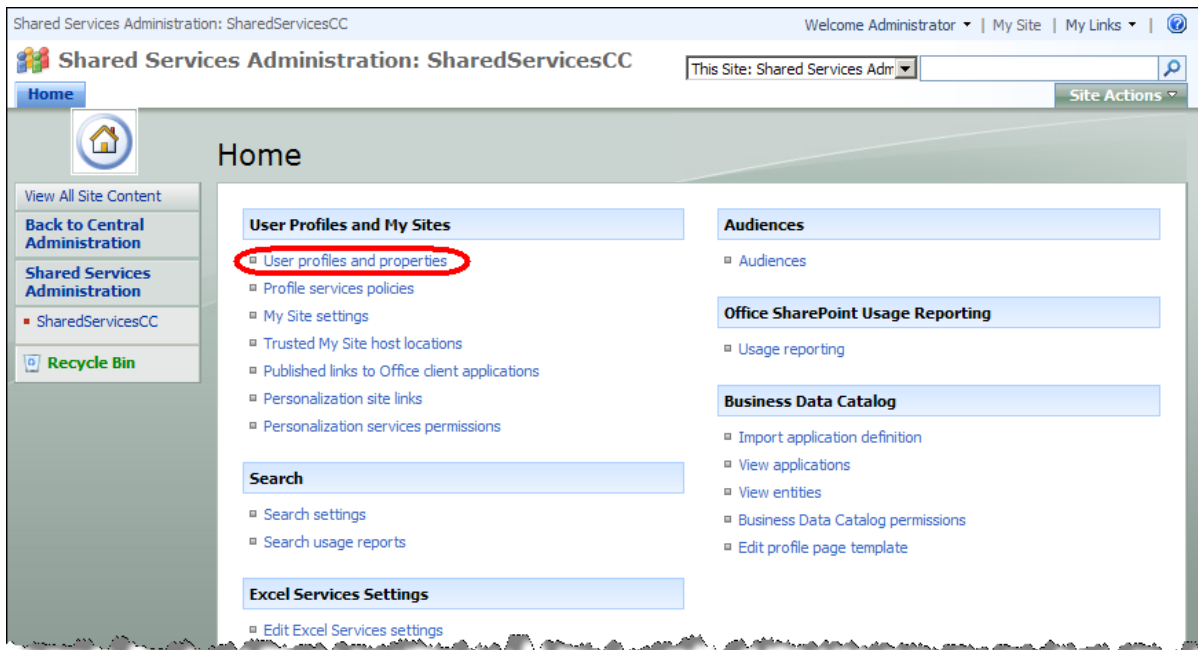
4.2.1 Index the Manager property

1OrgChart uses the **Manager** property in the User Profiles to create the hierarchy relationship between people. To enable the property to be used by 1OrgChart it must be included in the search index.

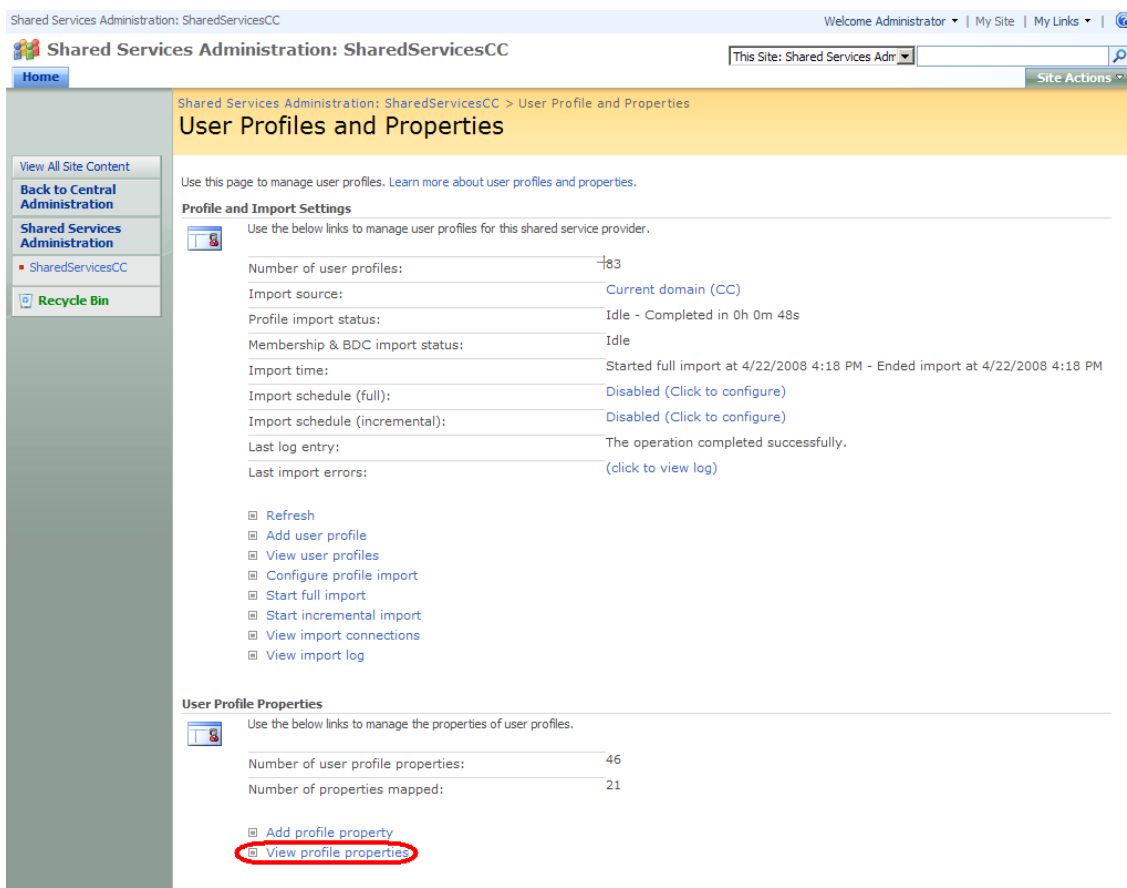
1. In **SharePoint Central Administration** navigate to the applicable **Shared Service Provider**



2. Below the section **User Profiles and My Sites**, click **User profiles and properties**



3. Below the section **User Property Profiles**, click **View profile properties**



4. Locate the **Manager** property

5. Click **Edit**

Shared Services Administration: SharedServicesCC > User Profile and Properties > View Profile Properties

View Profile Properties

Use this page to add, edit, organize, delete or map user profile properties. Profile properties can be mapped to Active Directory or LDAP compliant directory services. Profile properties can also be mapped to Application Entity Fields exposed by the Business Data Catalog.

[New Property](#) | [New Section](#) | 1 - 45

Property Name	Change Order	Property Type	Mapped Attribute	Multivalue	Alias
> Details	▼	Section			
Id	▲▼	unique identifier			
SID	▲▼	binary	objectSID		
Active Directory Id	▲▼	binary	objectGuid		
Account name	▲▼	Person	<Specific to connection>		✓
First name	▲▼	string	givenName		
Last name	▲▼	string	sn		
Name	▲▼	string	displayName		✓
Work phone	▲▼	string	telephoneNumber		
Office	▲▼	string	physicalDeliveryOfficeName		
Department	▲▼	string	department		
Title	▲▼	string	title		
Manager	▲▼	Person	manager		
Avatar	▲▼	HTML			
URL	▲▼				

Manager (highlighted with a red circle) | [Edit](#) | [Delete](#)

- In the section **Search Settings**, select the **Indexed** option
- Click **OK**

Display Settings

Specify whether or not the property is displayed in the profile properties section on the My Site profile page, whether the property is displayed on the Edit Details page, and whether changes to the property's values are displayed in the Colleague Tracker web part.

Note: These display settings will obey the user's privacy settings.

- ☐ Show in the profile properties section of the user's profile page
- ☒ Show on the Edit Details page
- ☒ Show changes in the Colleague Tracker web part

Search Settings

Aliased properties are treated as equivalent to the user name and account name when searching for items authored by a user, targeting items to a user, or displaying items in the Documents Web Part of the personal site for a user. Alias properties must be public.

Indexed properties are crawled by the search engine and become part of the People search scope schema. Only index a property if it will contain relevant information for people finding or if you want the data displayed in people search results.

- ☐ Alias
- ☒ Indexed (highlighted with a red circle)

Property Import Mapping

Specify the field to map to this property when importing user profile data. When importing from a Business Data Catalog source you can import data from associated entity fields by selecting the association. Mapping a multivalued field to a single value property is allowed, importing will attempt to get only the first value. Mapped properties cannot be modified by users.

If you are using a high privilege account for profile import, you will be able to read and import directory attributes that are not normally viewable by all users, make sure the appropriate default privacy setting is selected.

Note: The selection of directory service properties may be disabled if the shared service provider is in an untrusted domain or if profile import is not configured.

Multivalue property is tagged with "(M)".

Security Note: If you are using a high privilege account to import, you will be able to read and import directory attributes that are not normally accessible by users.

Source Data Connection: **Master Connection**

Data source field to map: **manager**

Enter field to map: (Clear to unmap)

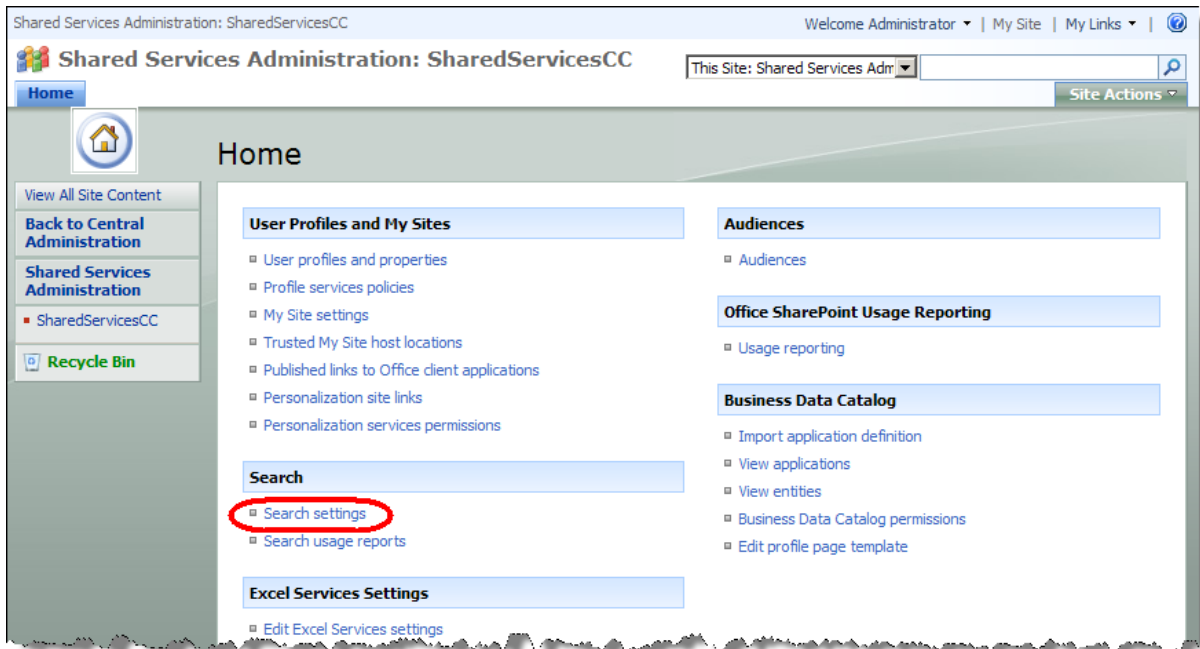
Manager field string format in AD: **Fully qualified distinguished name(CN=Jeff Smith, OU=Users, D=)**

OK (highlighted with a red circle) | **Cancel**

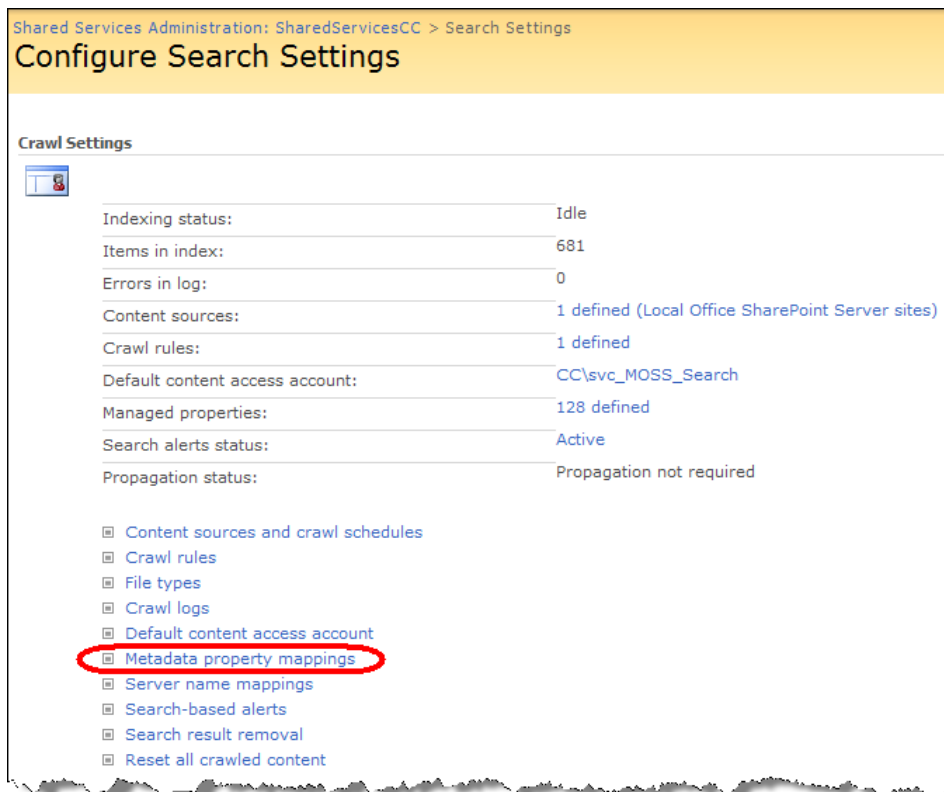
4.2.2 Create a new Managed Property named 'OrgChartManager'

The **Manager** property in the User Profiles must be mapped to a metadata property.

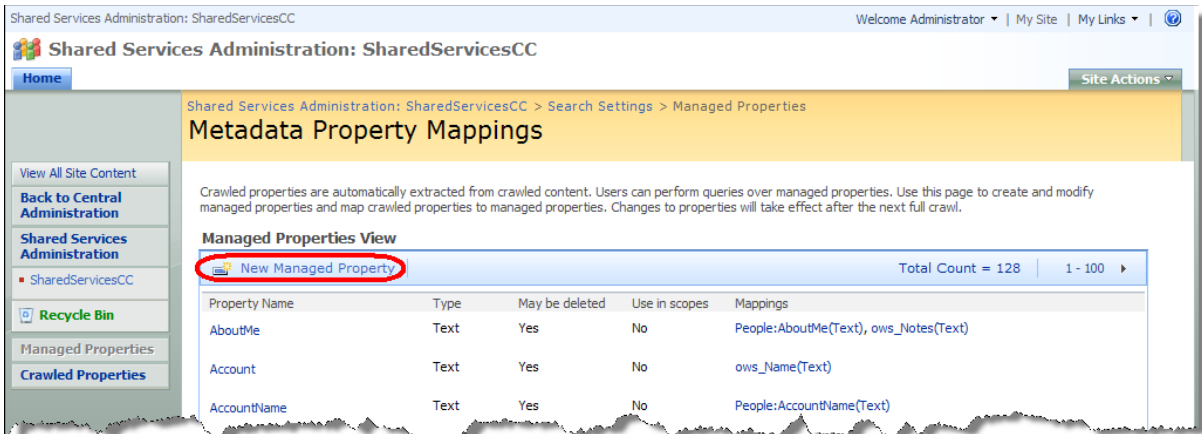
1. In **Central Administration** navigate to the associated **Shared Service Provider**
2. Below the section **Search**, click **Search Settings**



3. Click **Metadata property mappings**.



4. Click **New Managed Property**



Shared Services Administration: SharedServicesCC

Welcome Administrator | My Site | My Links

Shared Services Administration: SharedServicesCC

Home

Shared Services Administration: SharedServicesCC > Search Settings > Managed Properties

Metadata Property Mappings

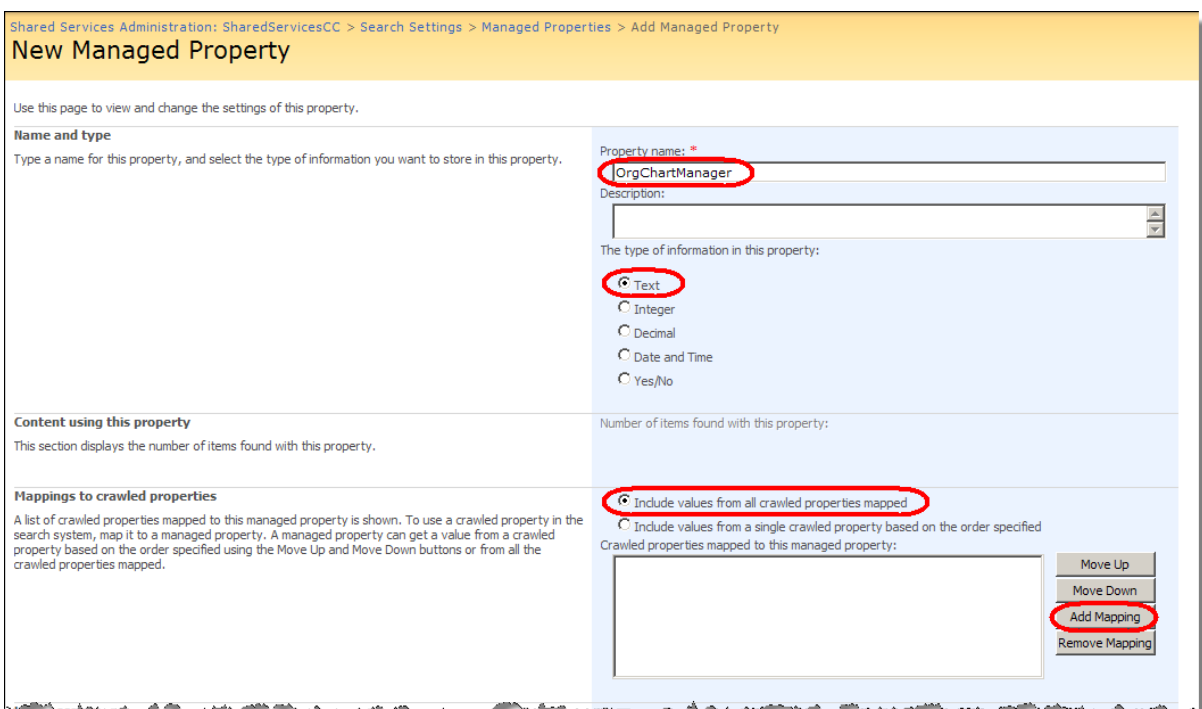
Crawled properties are automatically extracted from crawled content. Users can perform queries over managed properties. Use this page to create and modify managed properties and map crawled properties to managed properties. Changes to properties will take effect after the next full crawl.

Managed Properties View

New Managed Property Total Count = 128 1 - 100

Property Name	Type	May be deleted	Use in scopes	Mappings
AboutMe	Text	Yes	No	People:AboutMe(Text), ows_Notes(Text)
Account	Text	Yes	No	ows_Name(Text)
AccountName	Text	Yes	No	People:AccountName(Text)

- In the **Name and type** section, for the **Property Name**, type **OrgChartManager**
- Type a **Description** for the field (note that this is not mandatory)
- For **The type of information in this property** option, select **Text**
- In the section **Mappings to crawled properties**, select **Included values from all crawled properties mapped**
- Click **Add mapping**



Shared Services Administration: SharedServicesCC > Search Settings > Managed Properties > Add Managed Property

New Managed Property

Use this page to view and change the settings of this property.

Name and type

Type a name for this property, and select the type of information you want to store in this property.

Property name: * **OrgChartManager**

Description:

The type of information in this property:

☒ **Text**

☐ Integer

☐ Decimal

☐ Date and Time

☐ Yes/No

Content using this property

This section displays the number of items found with this property.

Number of items found with this property:

Mappings to crawled properties

A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.

☒ **Include values from all crawled properties mapped**

☐ Include values from a single crawled property based on the order specified

Crawled properties mapped to this managed property:

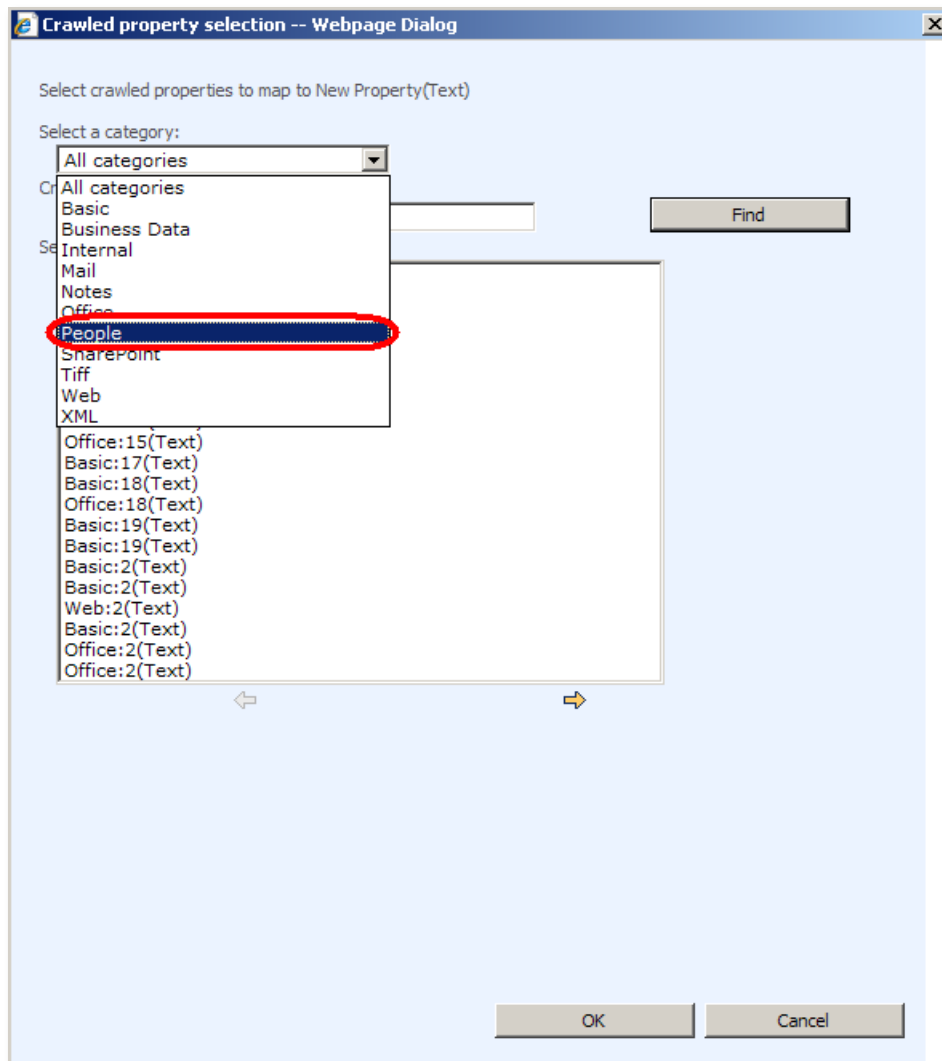
Move Up

Move Down

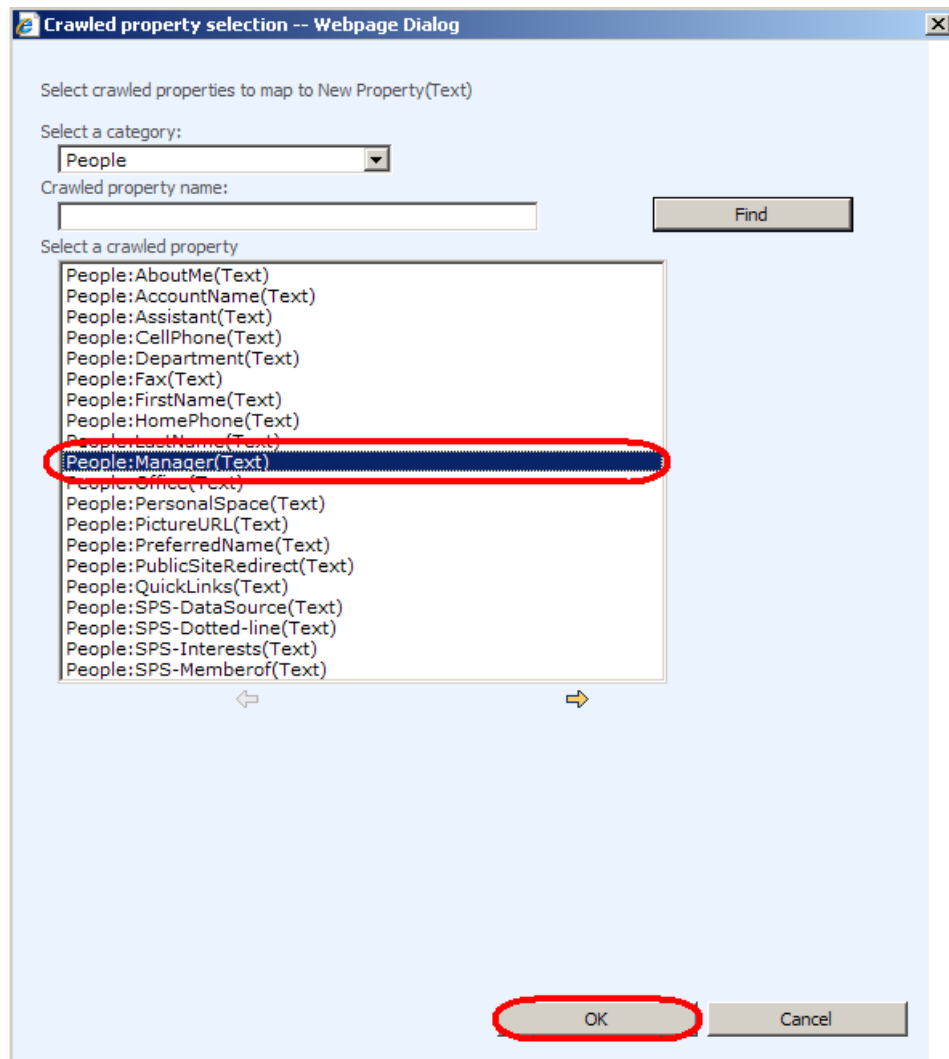
Add Mapping

Remove Mapping

10. The **Crawled property selection** dialog window will open
11. For the **Select a category** option, select **People**

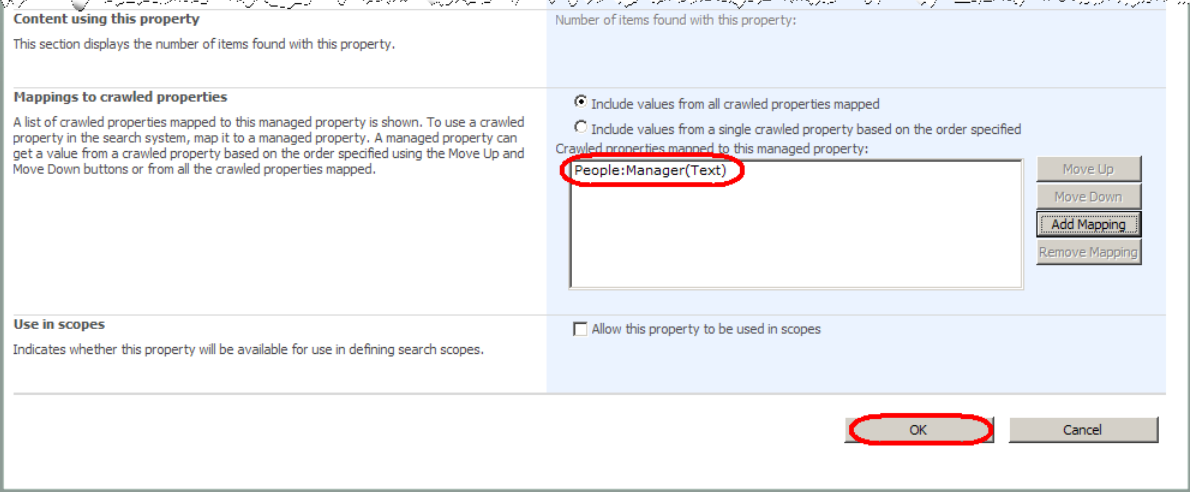


12. Below the section **Select a crawled property**, select **People:Manager(Text)**.
13. Click **OK**



14. The **People:Manager(Text)** property will be displayed in the **Crawled properties mapped to this managed property box**

15. Click **OK**



Content using this property
This section displays the number of items found with this property.

Number of items found with this property:

Mappings to crawled properties
A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.

☒ Include values from all crawled properties mapped
☐ Include values from a single crawled property based on the order specified

Crawled properties mapped to this managed property:

People:Manager(Text)

Move Up
Move Down
Add Mapping
Remove Mapping

Use in scopes
Indicates whether this property will be available for use in defining search scopes.

☐ Allow this property to be used in scopes

OK Cancel

16. The **OrgChartManager** property will be displayed in the **Metadata Property Mappings** page



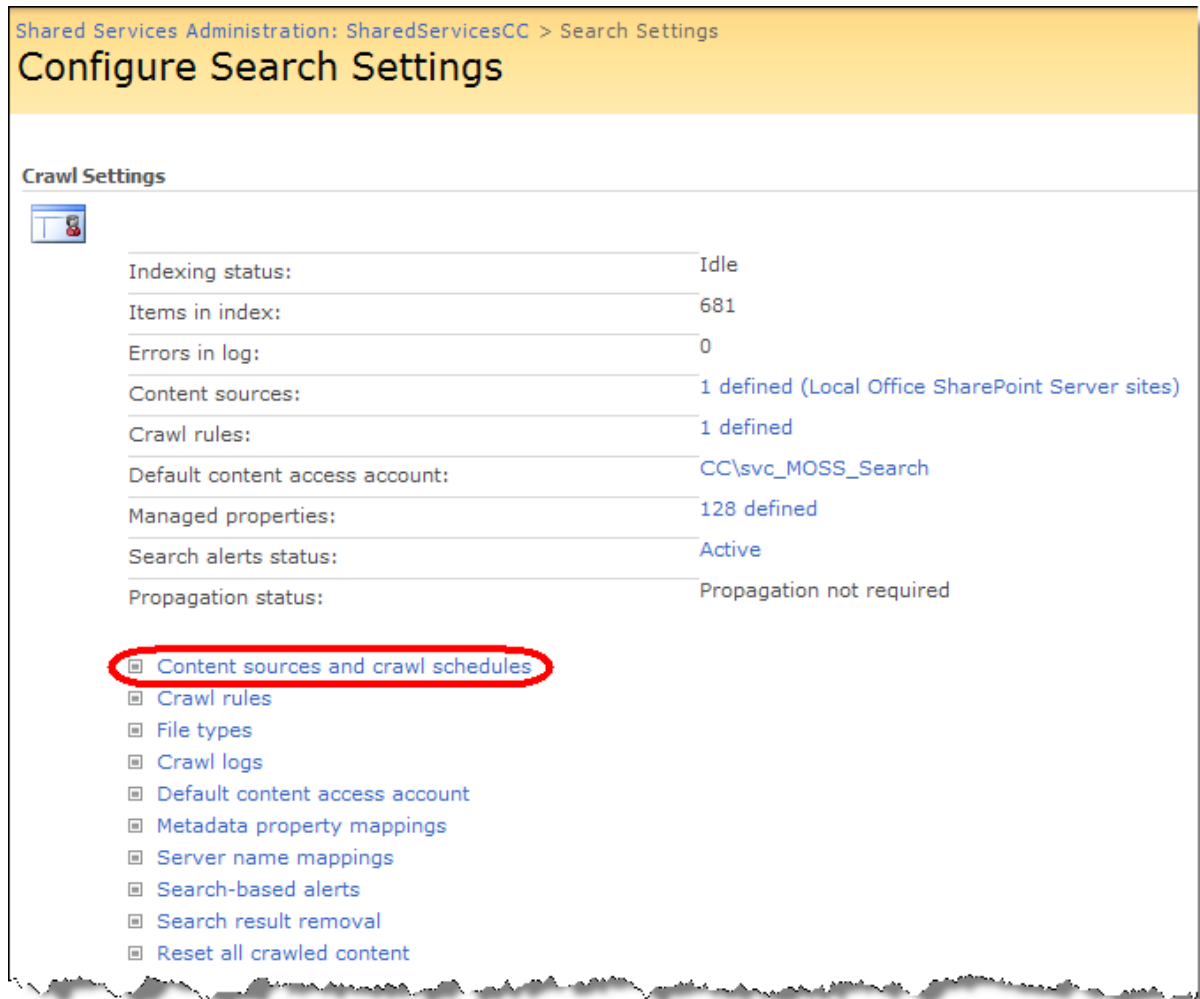
Notes	Text	Yes	No	ows_Note(Text), ows_Notes(Text)
objectid	Text	Yes	No	SharePoint:objectid(Text)
OfficeNumber	Text	Yes	No	People:Office(Text)
OrgChartManager	Text	Yes	No	People:Manager(Text)
OWS_URL	Text	No	No	ows_URL(Text)
PastProjects	Text	Yes	No	People:SPS-PastProjects(Text)
Path	Text	Yes	No	Basic:11(Text), Basic:9(Text), Web:20(Text)

4.2.3 Content Sources and Crawl Schedules

Important: Screenshots in this section might not exactly match your environment, depending on which Updates and Services packs have been installed in your SharePoint environment.

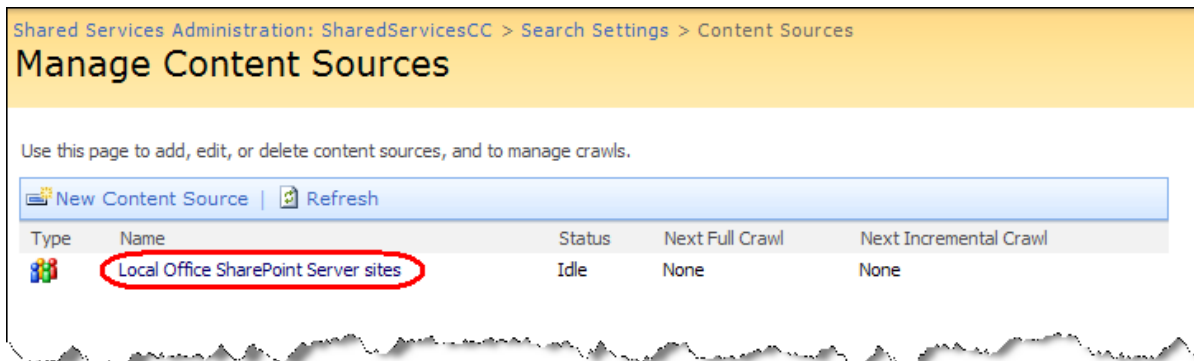
Once the new mapped property has been created, the content source must be crawled.

1. Navigate back to **Search Settings**
2. Click **Content sources and crawl schedules**

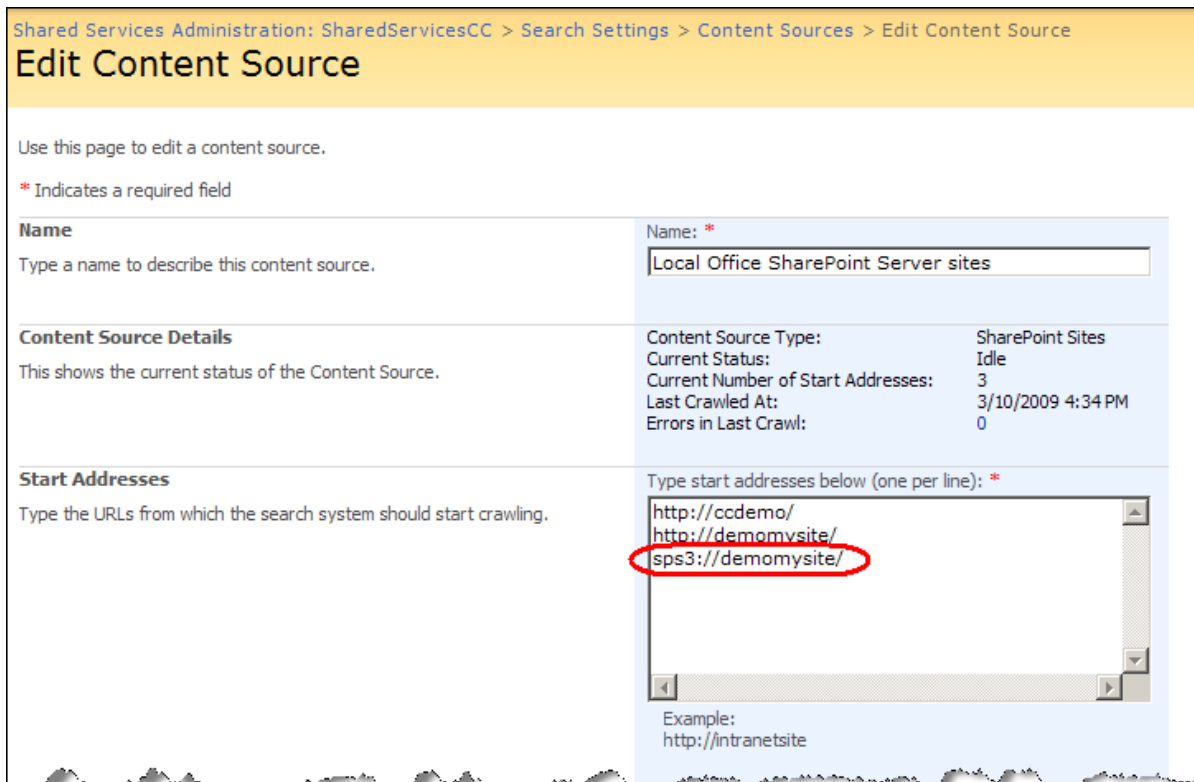


Important: The first time you configure the crawler, you must ensure that the correct start address is listed. The following steps outline how to check this.

- On the **Manage Content Sources** page, click the **Local Office SharePoint Server sites** link

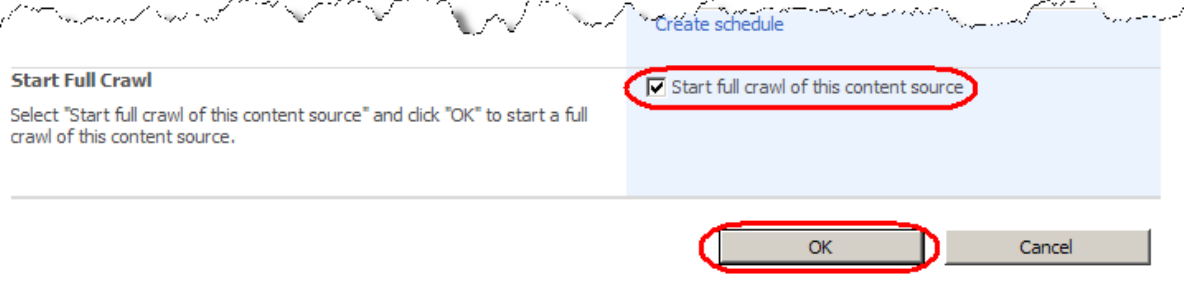


- In the section **Start Addresses**, check for the My Site host URL with a start address that begins with the **sps3://** prefix
- Repeat steps 3 and 4 for all Content Sources
- If you cannot locate the **sps3://** start address for the My Site host web application, then you can type this in the start address field of your default content source.



Important: The content source that includes the My Site host **sps3://** start address must be included in the crawl schedule and indexed regularly in order for the people information to be updated in the 1OrgChart web part.

7. Tick the option to **Start Full Crawl**
8. Click **OK**



Start Full Crawl

Select "Start full crawl of this content source" and click "OK" to start a full crawl of this content source.

☒ Start full crawl of this content source

OK Cancel

9. A Full Crawl will now be performed on the Local Office SharePoint Server sites and this may take a few minutes. Do not continue with the next step until the **Content Source** status changes from **Crawling Full**, to **Idle**.

Shared Services Administration: SharedServicesCC > Search Settings > Content Sources

Manage Content Sources

Use this page to add, edit, or delete content sources, and to manage crawls.

[New Content Source](#) | [Refresh](#)


Type	Name	Status	Next Full Crawl	Next Incremental Crawl
	Local Office SharePoint Server sites	Crawling Full	8/5/2008 1:00:00 AM	8/4/2008 3:10:00 PM

Shared Services Administration: SharedServicesCC > Search Settings > Content Sources

Manage Content Sources

Use this page to add, edit, or delete content sources, and to manage crawls.

[New Content Source](#) | [Refresh](#)

Type	Name	Status	Next Full Crawl	Next Incremental Crawl
	Local Office SharePoint Server sites	Idle	8/5/2008 1:00:00 AM	8/4/2008 3:10:00 PM

10. Navigate back to **Search Settings**

11. Below the section **Scopes**, click **Start update now**



Beaufort's Search Settings

Propagation status: Propagation not required

- [Content sources and crawl schedules](#)
- [Crawl rules](#)
- [File types](#)
- [Crawl logs](#)
- [Default content access account](#)
- [Metadata property mappings](#)
- [Server name mappings](#)
- [Search-based alerts](#)
- [Search result removal](#)
- [Reset all crawled content](#)


Scopes



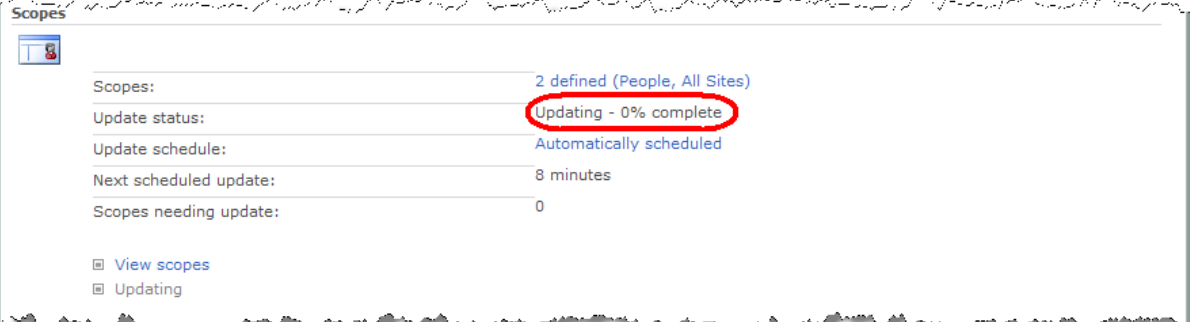
Scopes:	2 defined (People, All Sites)
Update status:	Idle
Update schedule:	Automatically scheduled
Next scheduled update:	14 minutes
Scopes needing update:	0

- [View scopes](#)
- [Start update now](#)


Authoritative Pages



12. The Scopes will now be updated. Do not continue until the Update status is **Idle**




Scopes




Scopes:	2 defined (People, All Sites)
Update status:	Updating - 0% complete
Update schedule:	Automatically scheduled
Next scheduled update:	8 minutes
Scopes needing update:	0

- [View scopes](#)
- [Updating](#)



Scopes



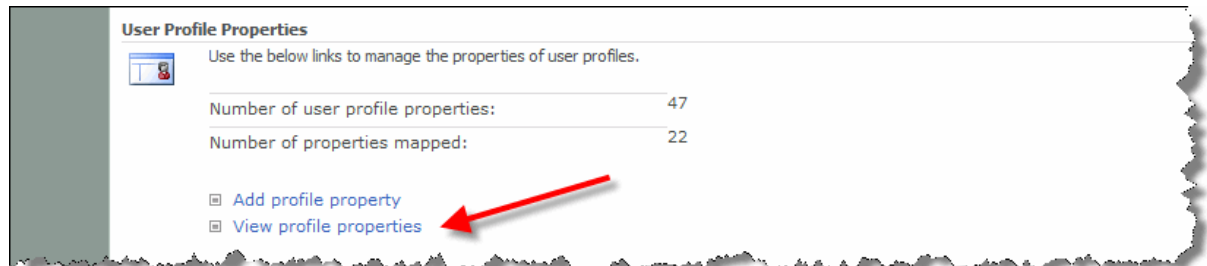
Scopes:	2 defined (People, All Sites)
Update status:	Idle
Update schedule:	Automatically scheduled
Next scheduled update:	14 minutes
Scopes needing update:	0

- [View scopes](#)
- [Start update now](#)

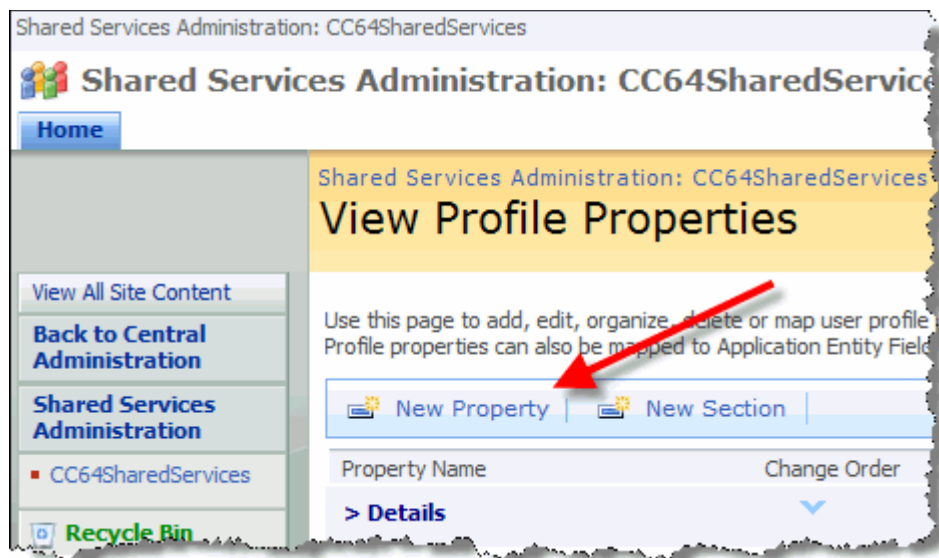
4.2.4 Custom Profile Properties

1OrgChart allows you to select and display any indexed property from your user profiles

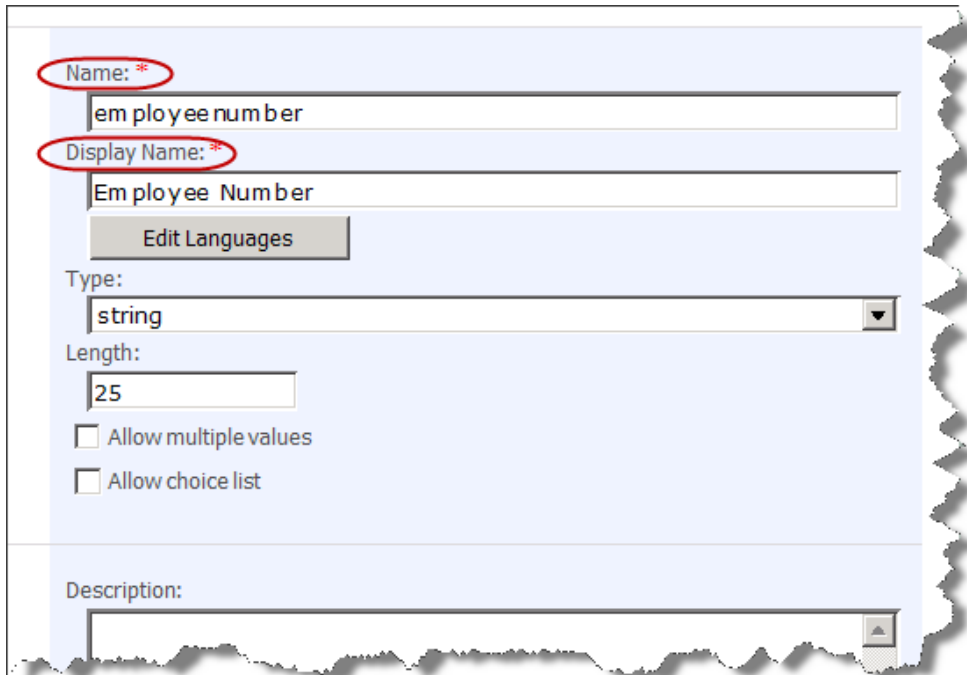
1. Navigate to your SSP and select “User profiles and properties”
2. Scroll to the “User Profile Properties” section and select “Add profile properties”



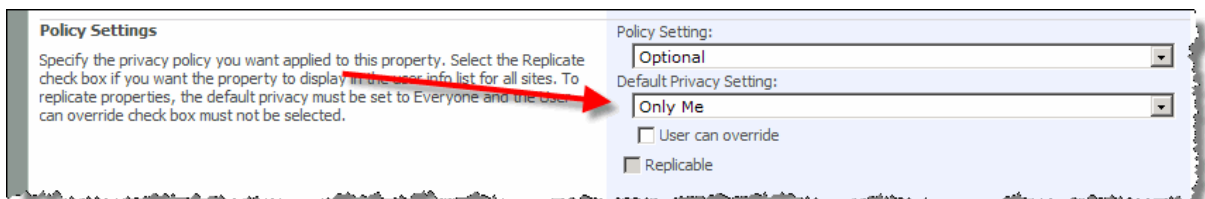
3. Click on “New Property”



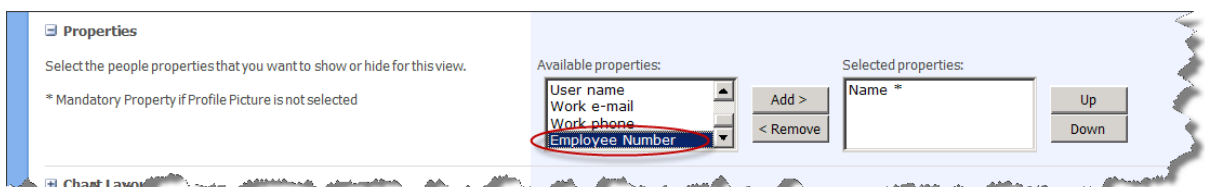
4. Within the **Name** field, enter the property name without spaces.
5. Within the **Display Name**, enter the property name as you would like it to appear within 1OrgChart.



6. Take particular note of the policy settings when setting up your property.

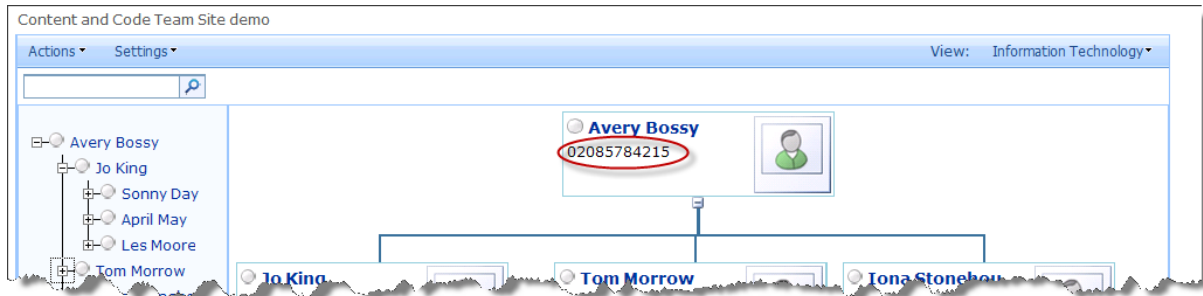


7. Set the default Privacy Setting to **Everyone** this enables the property to be indexed in search results and makes the property available to 1OrgChart.
8. Select **OK**.
9. Start a full crawl of your content sources to populate the new property.
10. The property should now be available to 1OrgChart



11. The property will appear in the available properties. Select and add the new property which will then appear in the “selected properties” window on the people card.

1. Click **OK**
2. When the property is populated for a user, the property value will appear in the chart.



5 Install 1OrgChart

Important: If you already have a previous version of 1OrgChart installed and intend on upgrading, follow steps provided in section **Error! Reference source not found. Error! Reference source not found..**

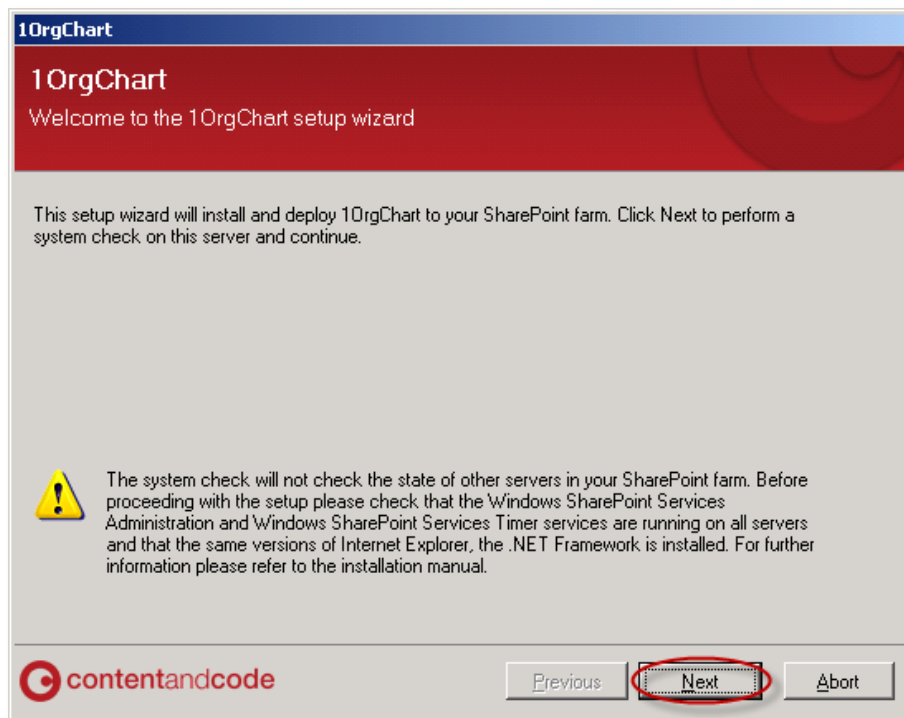
This section outlines the procedure for installing 1OrgChart to a single Microsoft Office SharePoint Server 2007 or Windows SharePoint Services 3.0 farm.

Important: Before proceeding with the installation please check that the account you are using to install 1OrgChart has the appropriate permissions outlined in section **2.3 – Permissions**.

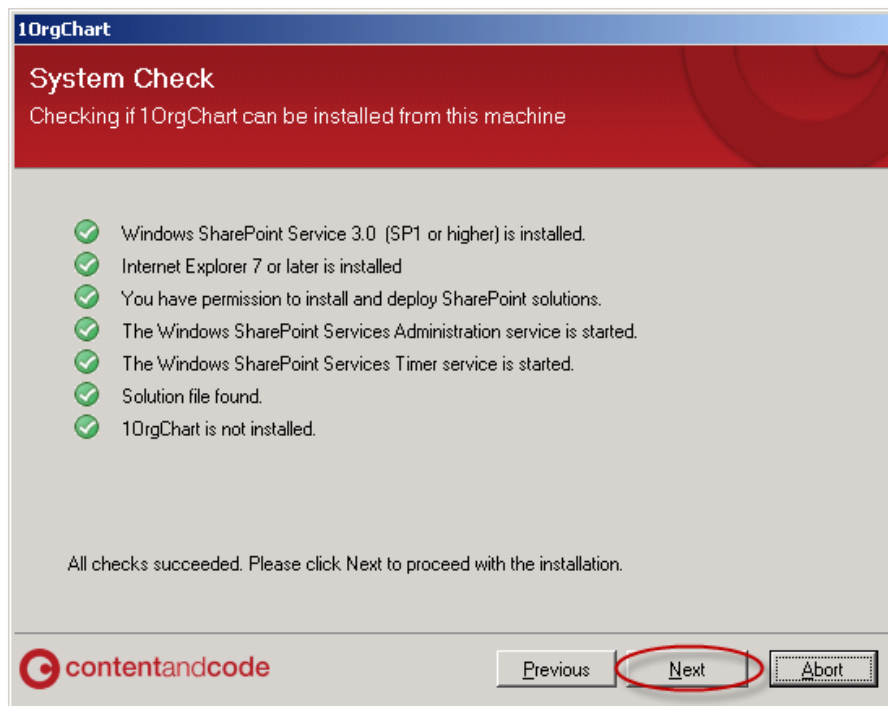
5.1 Deploy the Solution

Follow these steps to install and deploy 1OrgChart to one or more web applications.

1. Open **1OrgChart.Setup.exe**

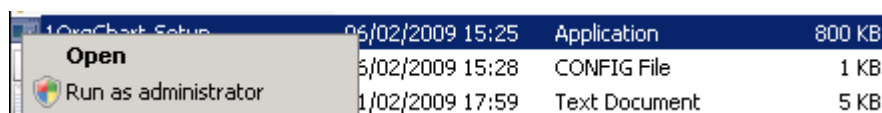


2. Click **Next**



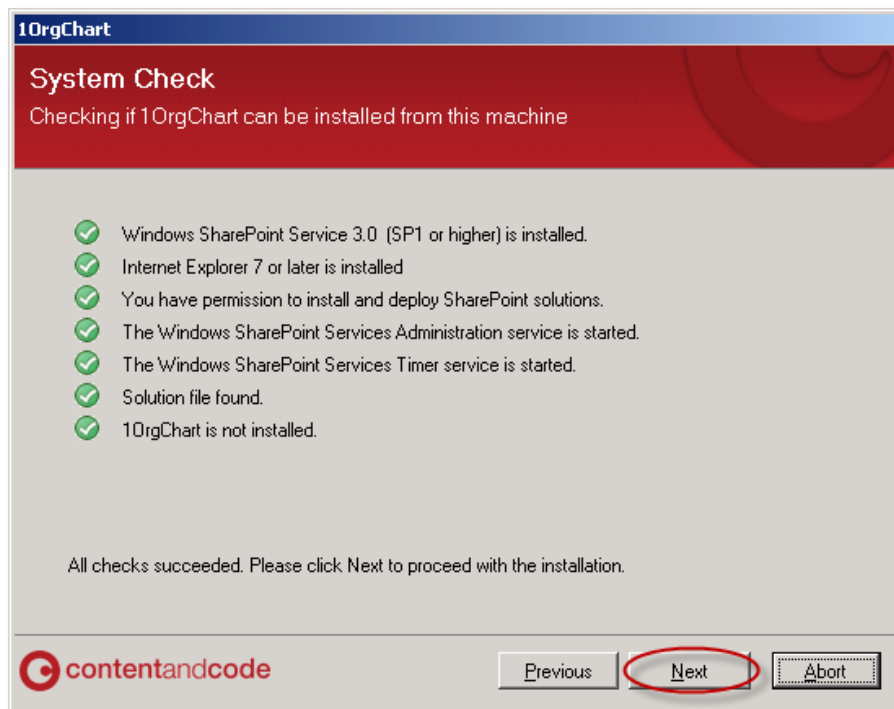
3. The setup will perform a system check to ensure the server meets the installation requirements. If one of the checks fails, simply abort the installation, and then resolve the issue before running the setup again.

Important: When installing to a SharePoint farm running on **Windows Server 2008** with **User Account Control (UAC) enabled**, the installation permissions must be **elevated** using the **Right-click > Run as administrator** option (see below)



Failure to do so will result in a System Check error for the Windows SharePoint Service Timer service check.

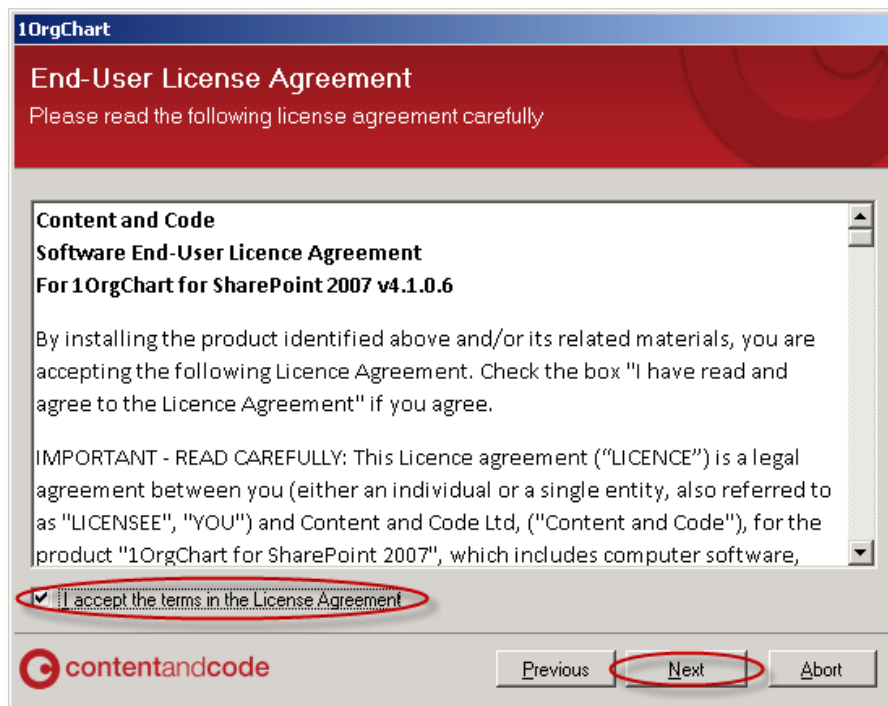
4. When the system check is successfully complete, click **Next**



Note: If you have a previous version of 1OrgChart installed on the farm, the setup wizard will offer you the option to upgrade. To perform an upgrade, follow the steps in section 7 - **Upgrade 1OrgChart**.

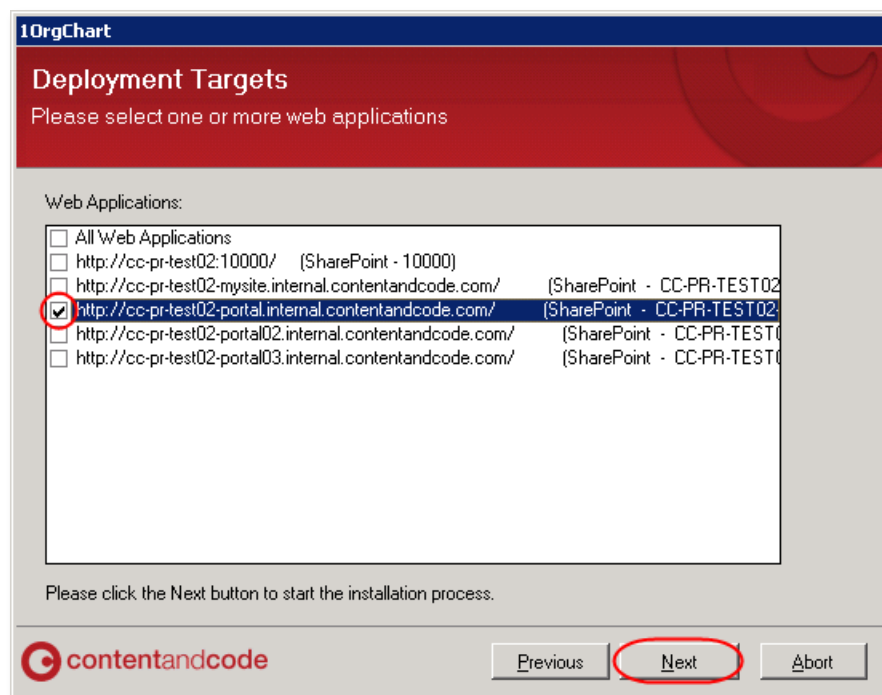
5. If you are installing 1OrgChart for the first time you will be prompted with the EULA acceptance window. Read and then agree to the terms of the licensing agreement by selecting **I accept the terms in the License Agreement**.

6. Click **Next**



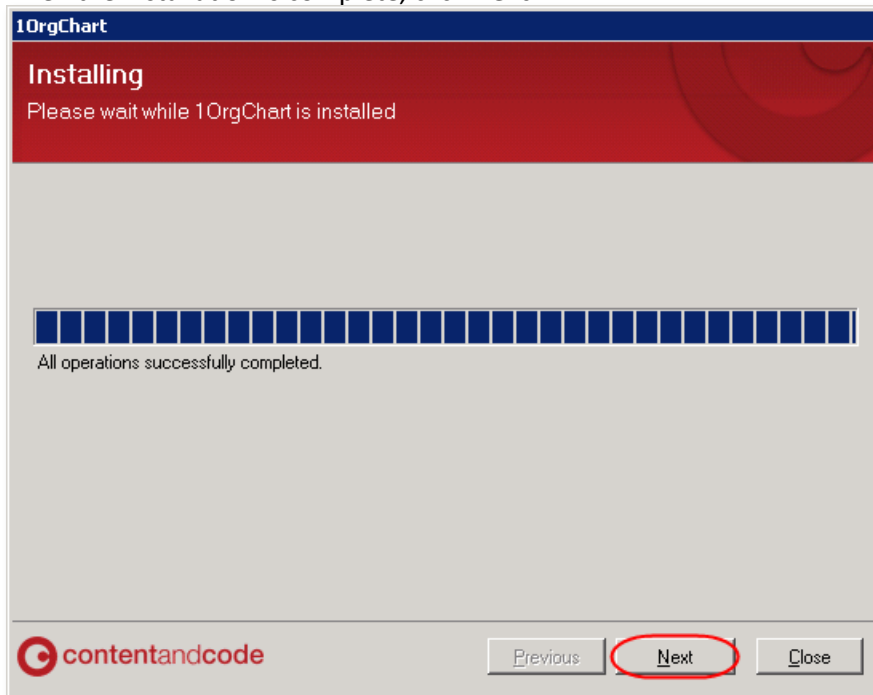
7. Select the Web Application where you intend to deploy 1OrgChart.

8. Click **Next**

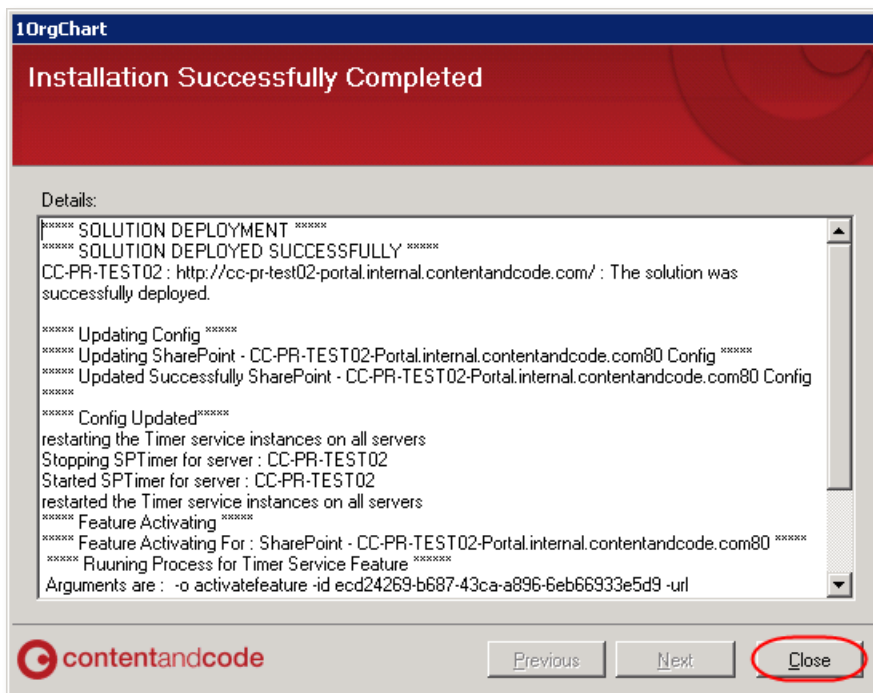


Note: If you need to install 1OrgChart to more than one web application, repeat the steps in section 5.1 – **Deploy the Solution** for each web application.

9. When the installation is complete, click **Next**



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



5.2 Apply a Product License Key

The following steps will take you through the process of uploading a product license key and activating the product once you have purchased the product.

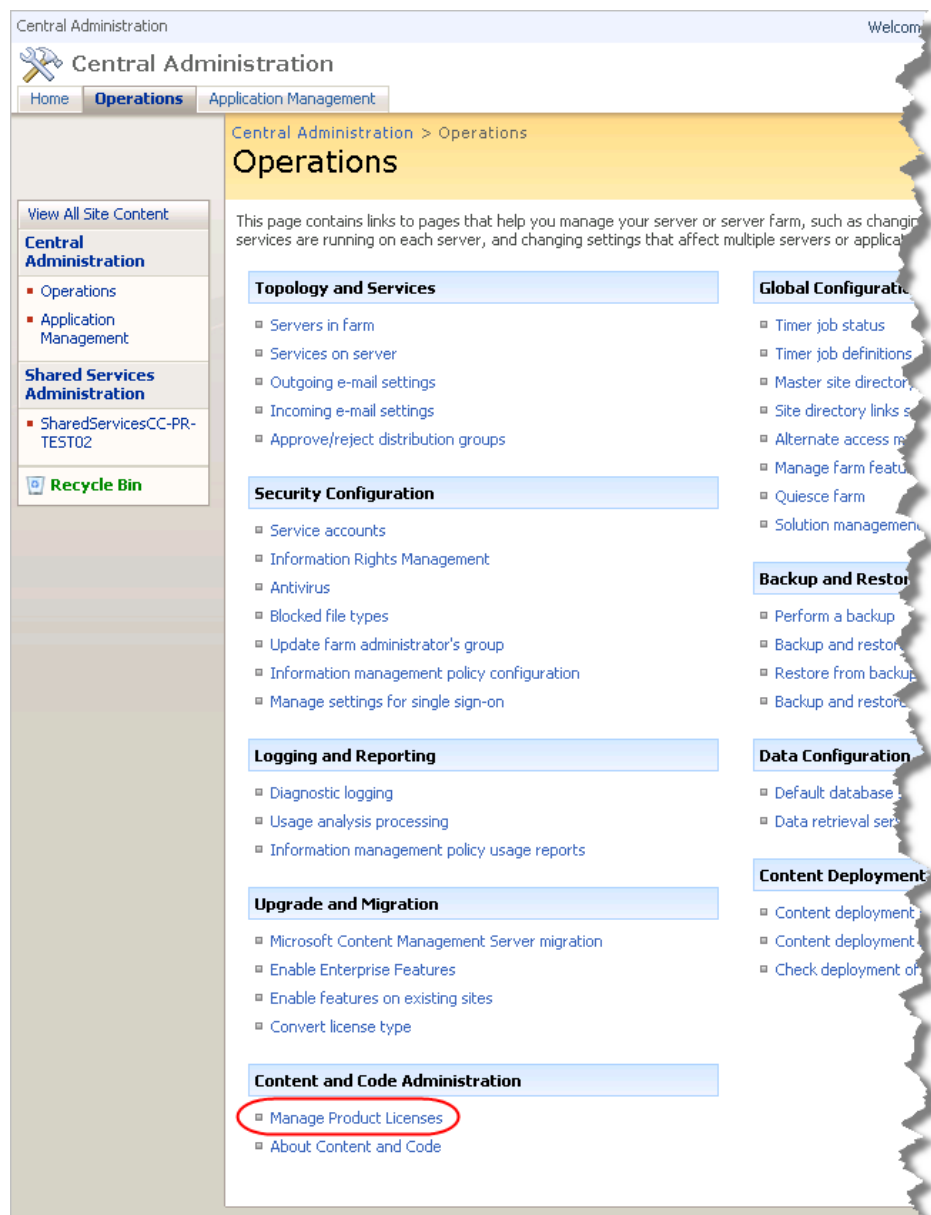
Note: For evaluation purposes the trial version of 1OrgChart will function without a product license key for up to 30 days. If you intend to evaluate the product and purchase a license at a later time, please skip this section and go to section 6 –

Configure 1OrgChart

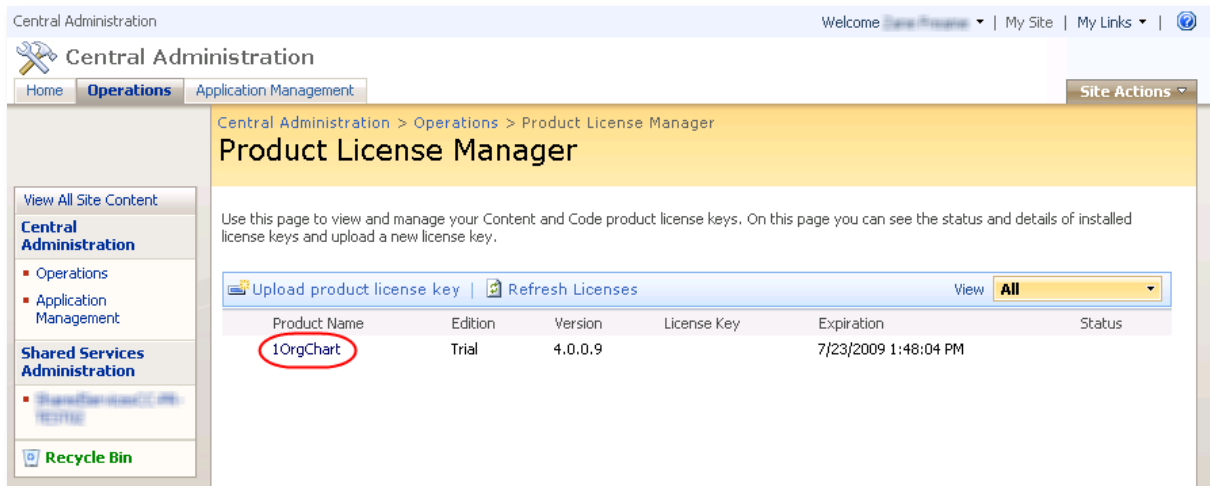
5.2.1 Upload the Product License Key

To upload and activate a product license key:

1. In **SharePoint Central Administration** click the **Operations** tab
2. Below the **Content and Code Administration** section click **Manage Product Licenses**



3. Click 1OrgChart



Central Administration

Welcome [User Name] | My Site | My Links | [Help Icon]

Central Administration

Home Operations Application Management Site Actions

Central Administration > Operations > Product License Manager

Product License Manager

Use this page to view and manage your Content and Code product license keys. On this page you can see the status and details of installed license keys and upload a new license key.

Upload product license key | Refresh Licenses View All

Product Name	Edition	Version	License Key	Expiration	Status
1OrgChart	Trial	4.0.0.9		7/23/2009 1:48:04 PM	

View All Site Content

Central Administration

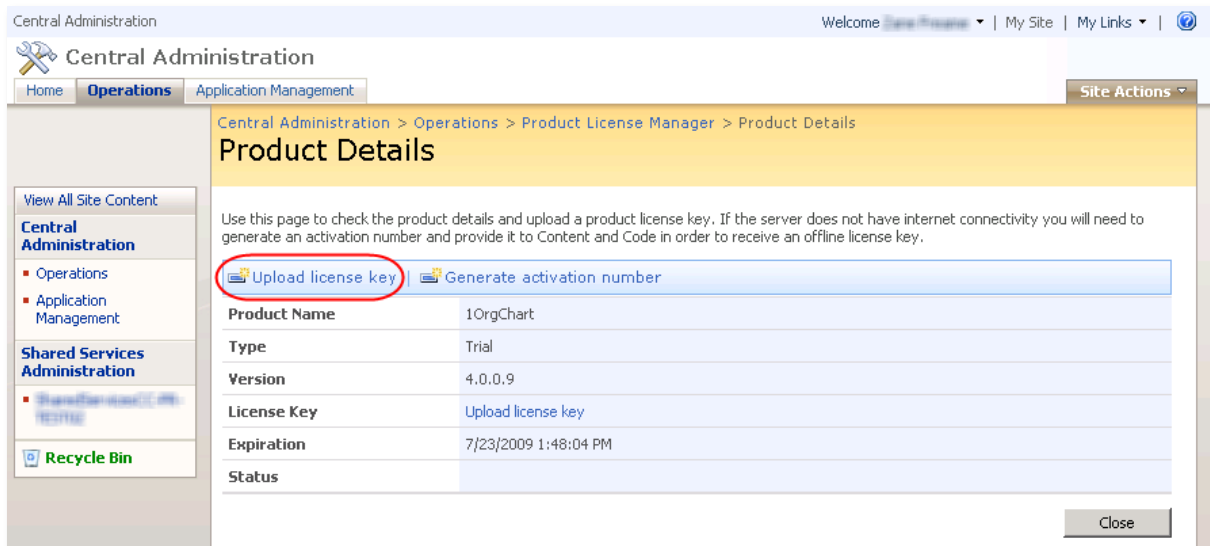
- Operations
- Application Management

Shared Services Administration

- Shared Services Administration

Recycle Bin

4. Click Upload license key



Central Administration

Welcome [User Name] | My Site | My Links | [Help Icon]

Central Administration

Home Operations Application Management Site Actions

Central Administration > Operations > Product License Manager > Product Details

Product Details

Use this page to check the product details and upload a product license key. If the server does not have internet connectivity you will need to generate an activation number and provide it to Content and Code in order to receive an offline license key.

Upload license key | Generate activation number

Product Name	1OrgChart
Type	Trial
Version	4.0.0.9
License Key	Upload license key
Expiration	7/23/2009 1:48:04 PM
Status	

Close

View All Site Content

Central Administration

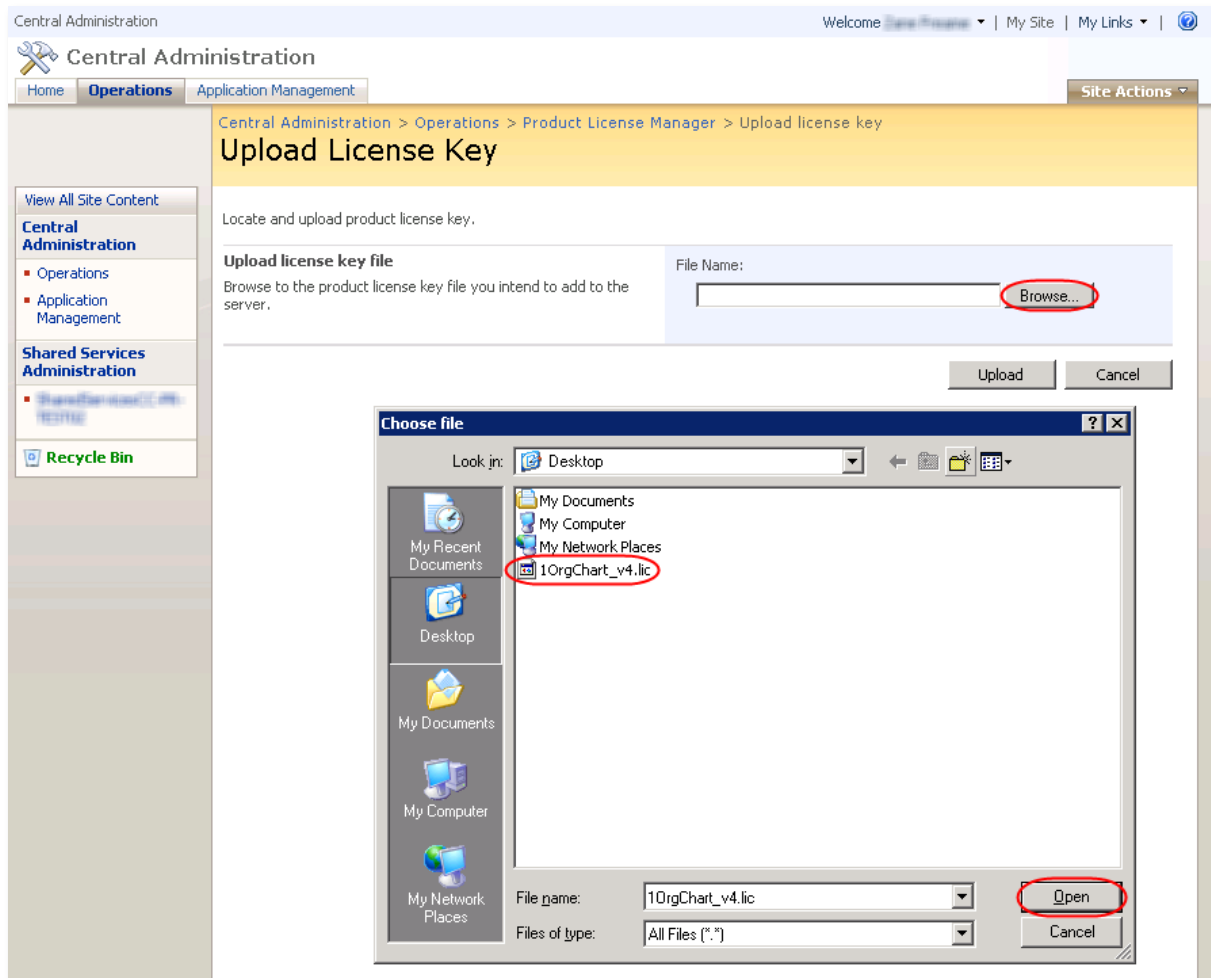
- Operations
- Application Management

Shared Services Administration

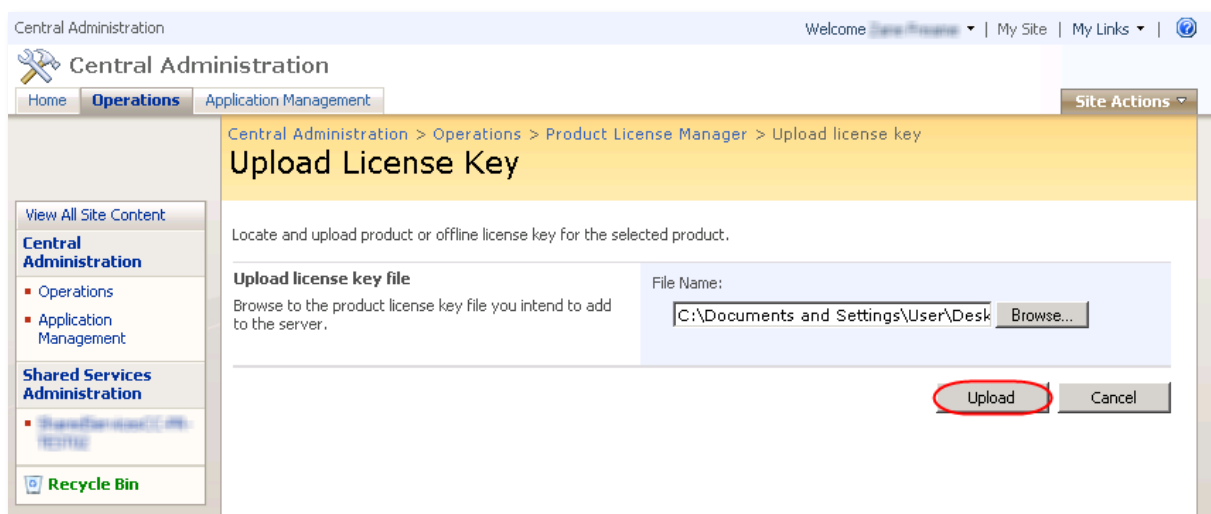
- Shared Services Administration

Recycle Bin

5. Click **Browse**
6. Locate the license key file (with .lic file extension) and click **Open**



7. Click **Upload**



5.2.2 Activate the License Key

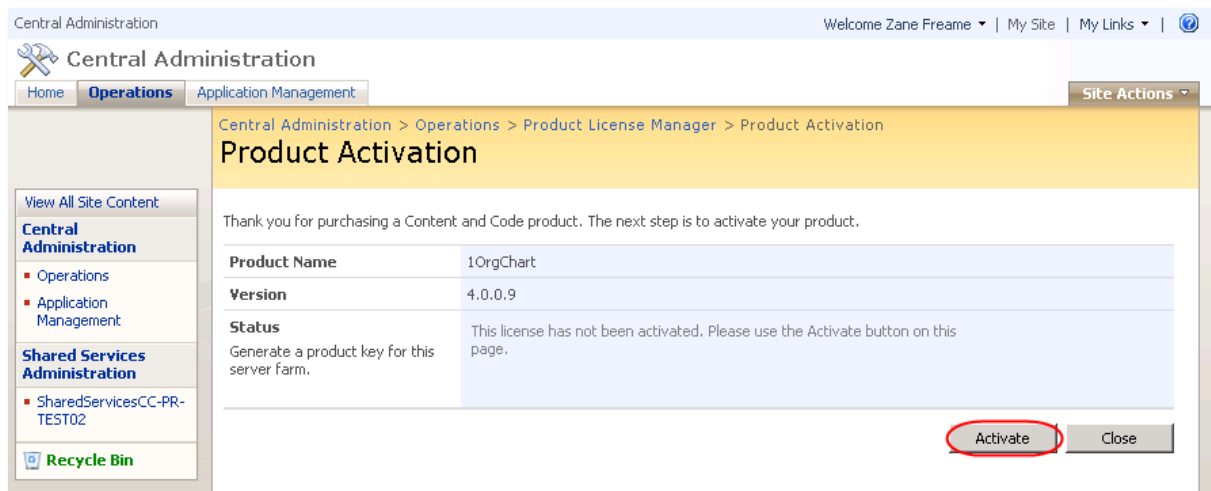
The product license key must be registered online before the product is fully activated.

Important: If your SharePoint server does not have access to the internet then you will not be able to activate the product using a standard license key.

To activate your product offline you will need to request a new offline key by following the steps in section **5.2.3 – Offline Activation**.

To activate the license key using the online registration option:

1. On the Product Activation page, click **Activate**



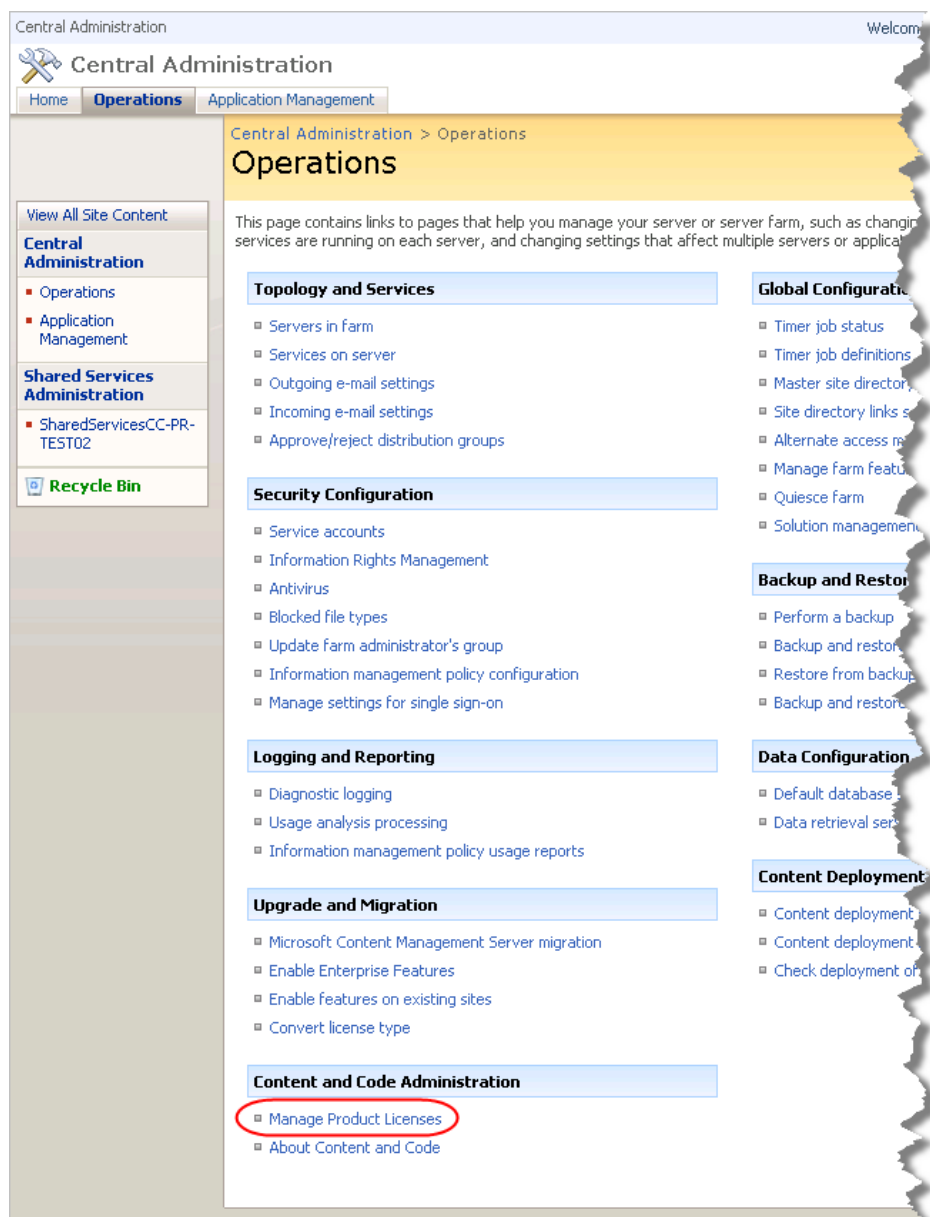
5.2.3 Offline Activation

Important: An offline license key is **ONLY** required when a product needs to be activated on a server that does not have internet connectivity e.g. when the SharePoint environment is behind a firewall that prevents internet access. If the product has already been activated please skip this section and proceed to section 6 **Configure 1OrgChart**

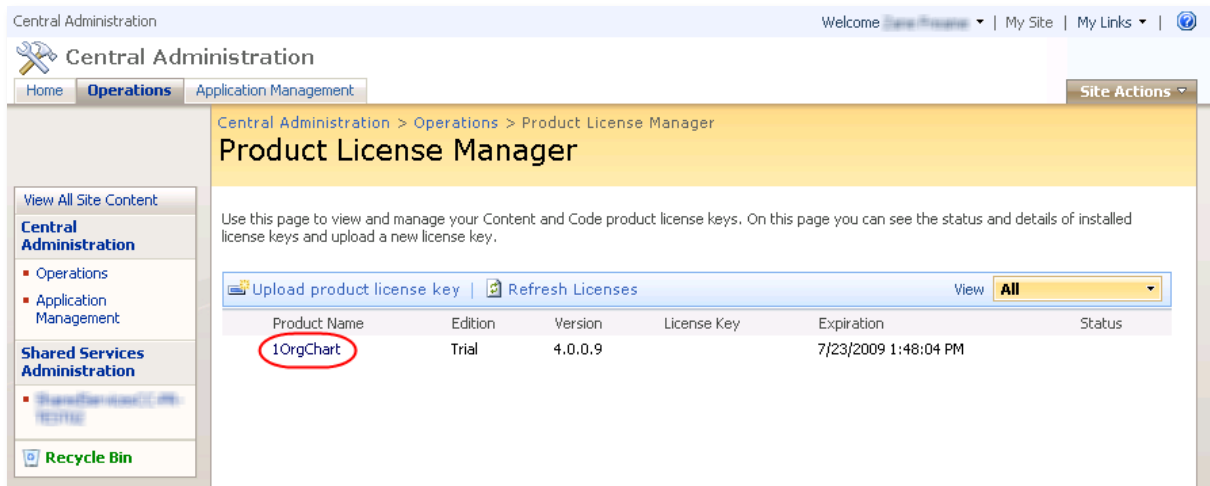
To activate the license key offline you will need to generate a Unique Activation Number (UAN) and send this to Content and Code. The UAN is used by Content and Code to create a matching Offline License Key which can be used to activate the product on the same server farm.

To generate and send a Unique Activation Number:

1. In **SharePoint Central Administration** click the **Operations** tab
2. Below the **Content and Code Administration** section click **Manager Product Licenses**



3. Click 1OrgChart



Central Administration > Operations > Product License Manager

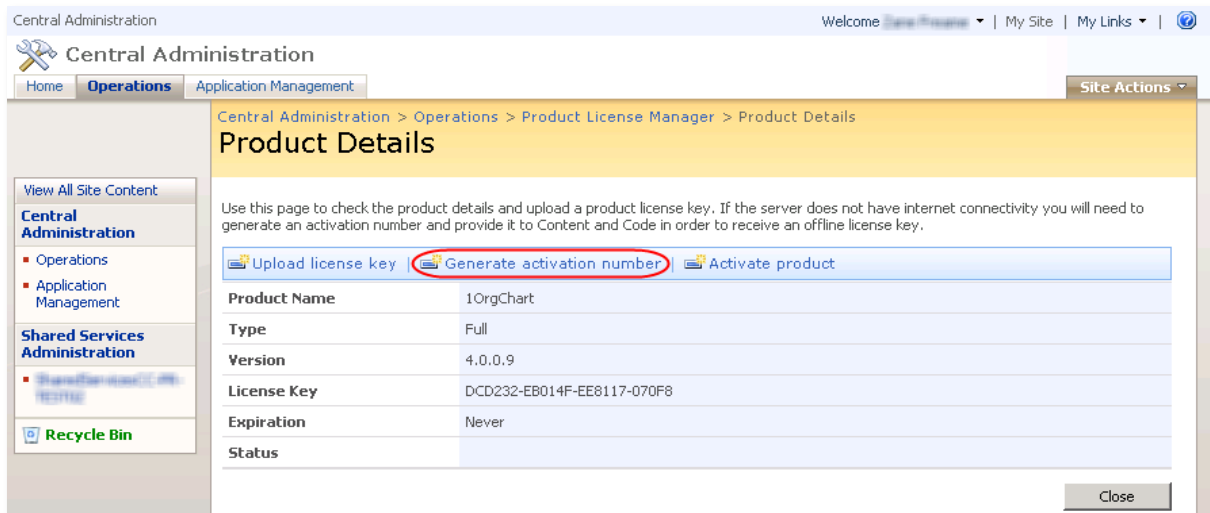
Product License Manager

Use this page to view and manage your Content and Code product license keys. On this page you can see the status and details of installed license keys and upload a new license key.

[Upload product license key](#) | [Refresh Licenses](#) View **All**

Product Name	Edition	Version	License Key	Expiration	Status
1OrgChart	Trial	4.0.0.9		7/23/2009 1:48:04 PM	

4. Click Generate activation number



Central Administration > Operations > Product License Manager > Product Details

Product Details

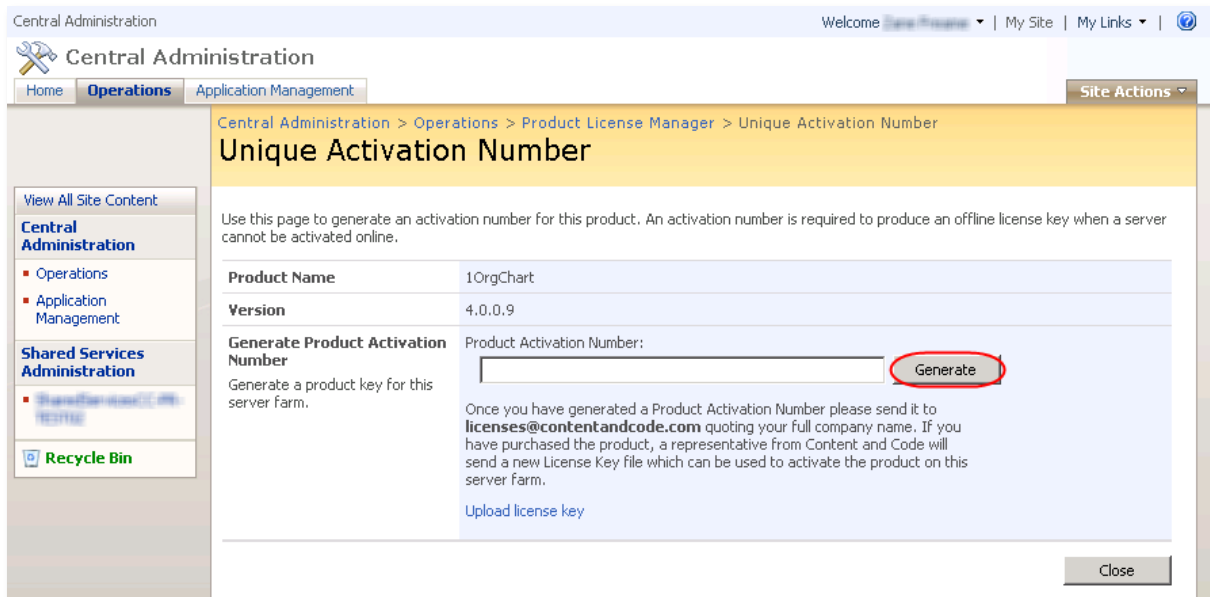
Use this page to check the product details and upload a product license key. If the server does not have internet connectivity you will need to generate an activation number and provide it to Content and Code in order to receive an offline license key.

[Upload license key](#) | [Generate activation number](#) | [Activate product](#)

Product Name	1OrgChart
Type	Full
Version	4.0.0.9
License Key	DCD232-EB014F-EE8117-070F8
Expiration	Never
Status	

Close

5. Click **Generate**



Central Administration > Operations > Product License Manager > Unique Activation Number

Unique Activation Number

Use this page to generate an activation number for this product. An activation number is required to produce an offline license key when a server cannot be activated online.

Product Name	1OrgChart
Version	4.0.0.9

Generate Product Activation Number

Generate a product key for this server farm.

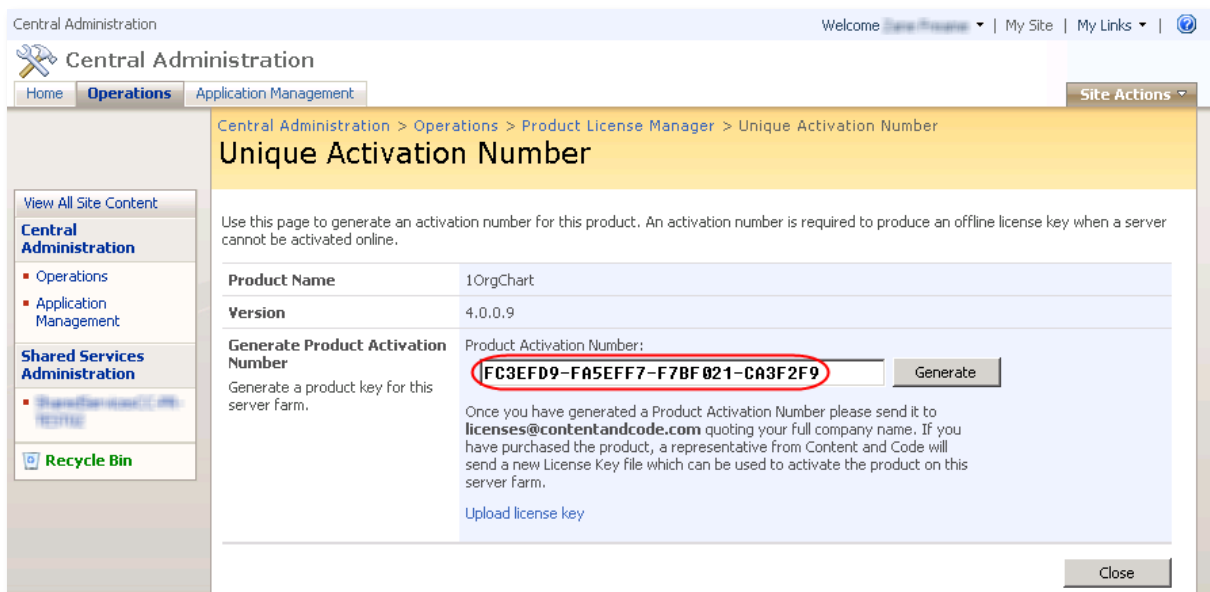
Product Activation Number: **Generate**

Once you have generated a Product Activation Number please send it to licenses@contentandcode.com quoting your full company name. If you have purchased the product, a representative from Content and Code will send a new License Key file which can be used to activate the product on this server farm.

[Upload license key](#)

Close

6. Copy the **Unique Activation Number** and send it to licenses@contentandcode.com



Central Administration > Operations > Product License Manager > Unique Activation Number

Unique Activation Number

Use this page to generate an activation number for this product. An activation number is required to produce an offline license key when a server cannot be activated online.

Product Name	1OrgChart
Version	4.0.0.9

Generate Product Activation Number

Generate a product key for this server farm.

Product Activation Number: **FC3EFD9-FA5EFF7-F7BF021-CA3F2F9** **Generate**

Once you have generated a Product Activation Number please send it to licenses@contentandcode.com quoting your full company name. If you have purchased the product, a representative from Content and Code will send a new License Key file which can be used to activate the product on this server farm.

[Upload license key](#)

Close

Important: Once Content and Code have received your Unique Activation Number they will send you a new product key that can be used to activate the product offline.

7. Click Upload license key

Central Administration

Welcome [User Name] | My Site | My Links

Central Administration

Home Operations Application Management Site Actions

Central Administration > Operations > Product License Manager > Unique Activation Number

Unique Activation Number

Use this page to generate an activation number for this product. An activation number is required to produce an offline license key when a server cannot be activated online.

Product Name	1OrgChart
Version	4.0.0.9

Generate Product Activation Number

Product Activation Number:

FC3EFD9-FA5EFF7-F7BF021-CA3F2F9

Generate

Generate a product key for this server farm.

Once you have generated a Product Activation Number please send it to licenses@contentandcode.com quoting your full company name. If you have purchased the product, a representative from Content and Code will send a new License Key file which can be used to activate the product on this server farm.

Upload license key

Close

8. Click Upload

Central Administration

Welcome [User Name] | My Site | My Links

Central Administration

Home Operations Application Management Site Actions

Central Administration > Operations > Product License Manager > Upload license key

Upload License Key

Locate and upload product or offline license key for the selected product.

Upload license key file

Browse to the product license key file you intend to add to the server.

File Name:

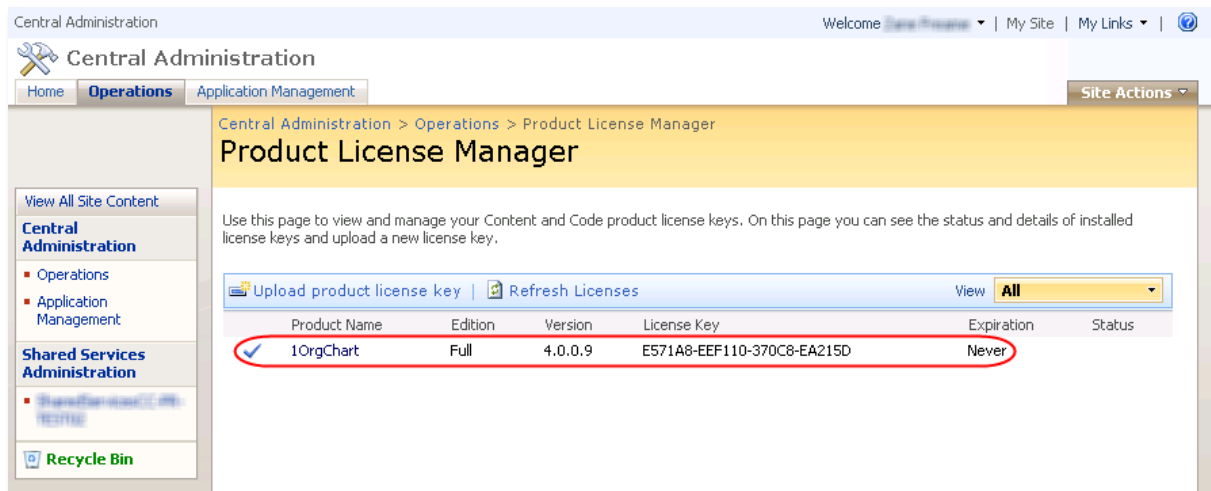
nts and Settings\User\Desktop\1OrgCh

Browse...

Upload

Cancel

9. If the license key matches the server where the UAN was generated, the license file will activate the product automatically and take you to the **Product License Manager** page (below).



Note: A tick ✓ is displayed next to each product on the Product License Manager page that has been activated. The Product License Manager page also includes details of the product, including the edition, version and expiration date (if a trial license is installed).

6 Configure 1OrgChart

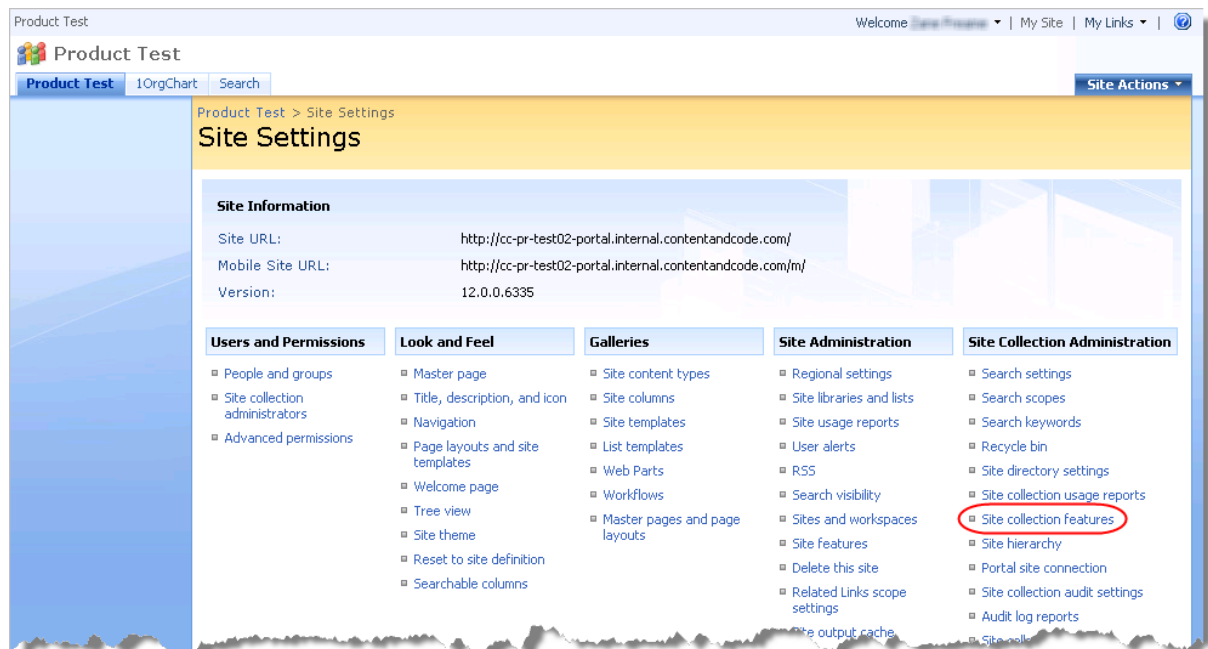
6.1 Activate the Site Collection Feature

Important: To ensure that custom profile lists are transferred correctly; be sure to create a copy of the user profile information as deactivating the product before the upgrade will replace the existing list with a new list.

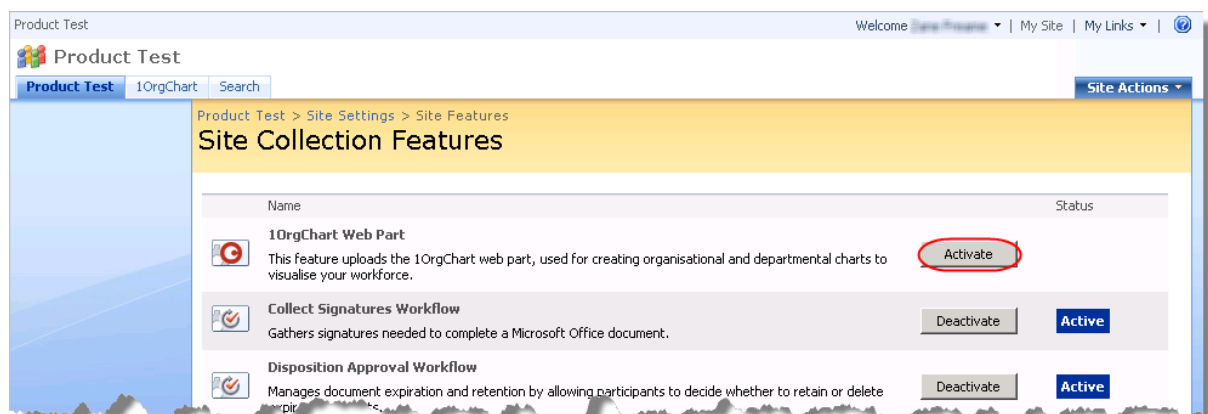
If you're upgrading from an earlier release than 4.0.1.9, please upgrade to 4.0.1.9 first

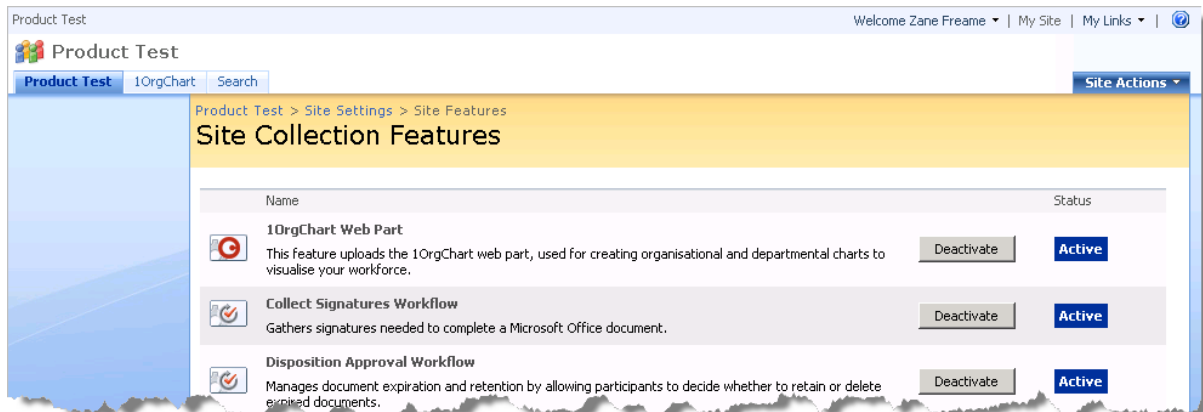
Follow these steps to activate the 1OrgChart site collection feature.

1. Open the top level site in your site collection.
2. Go to **Site Actions > Site Settings > Modify All Site Settings**.
3. Under **Site Collection Administration**, click **Site Collection Features**.



4. Click Activate.



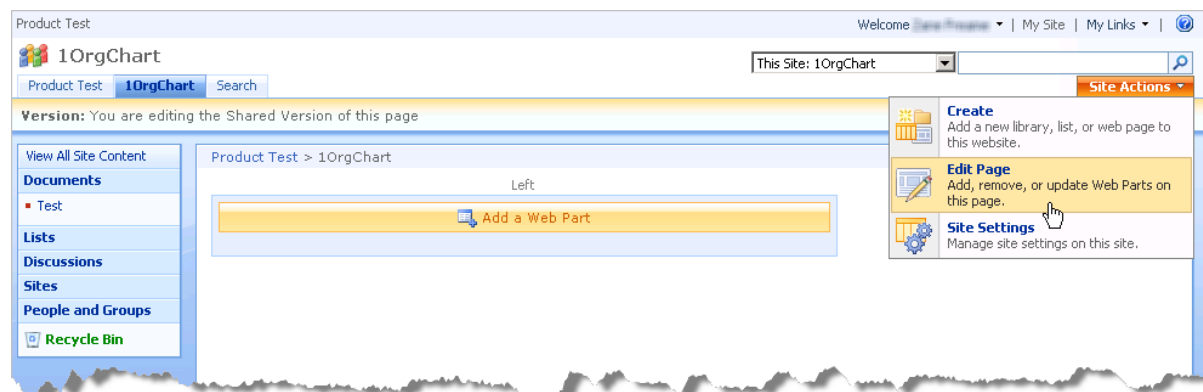


Congratulations!

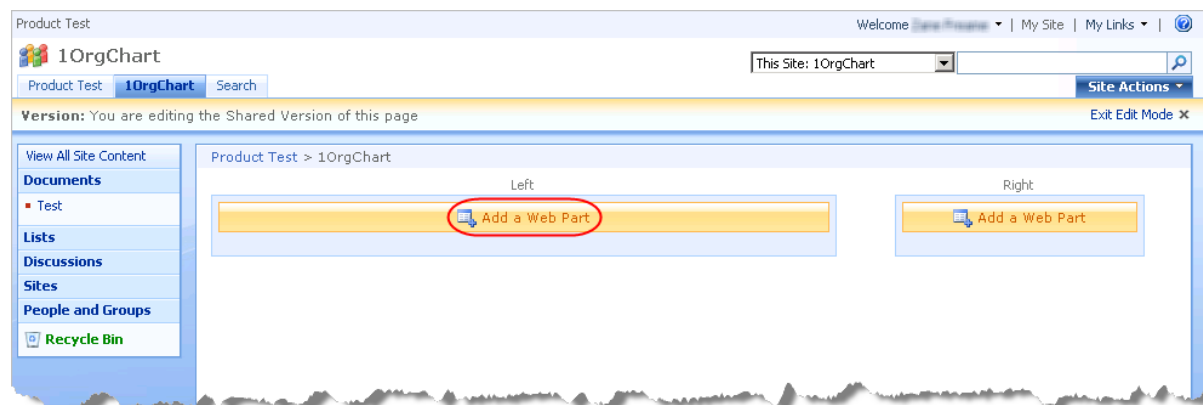
The 1OrgChart web part is now available in the web part gallery and ready to use. 1OrgChart is now installed and configured. The web part can be added to any SharePoint web page with a web part zone.

6.2 Add the web part to the page

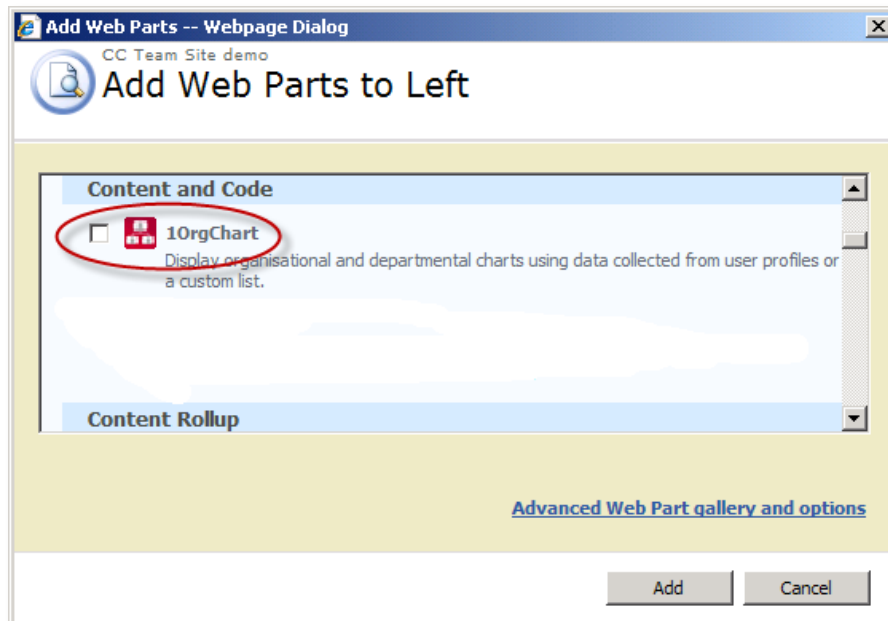
1. Browse to the site where you have installed 1OrgChart.
2. From the **Site Actions** menu, click **Edit Page**



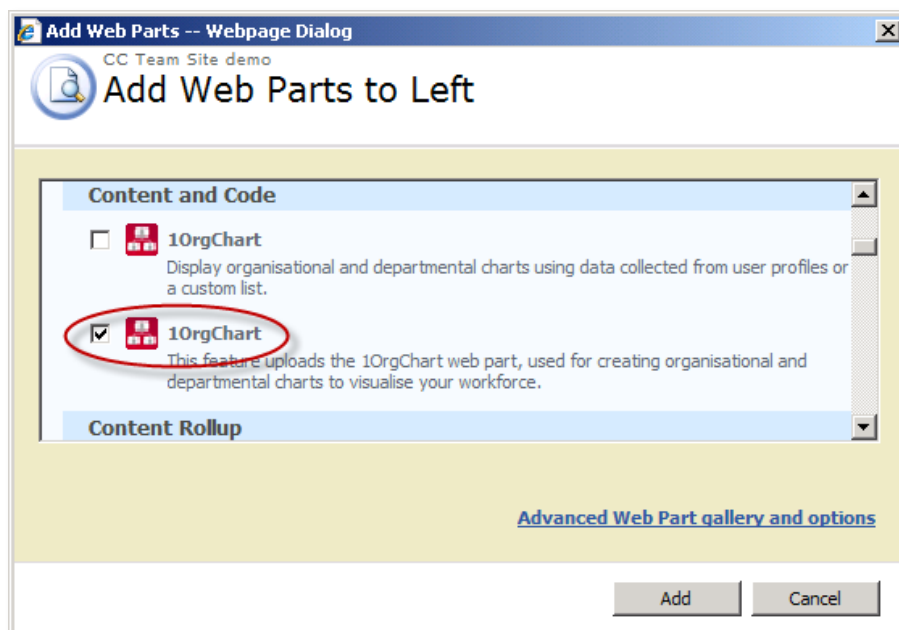
3. On a web part zone, click **Add a Web Part**



4. If this is the first time you have installed 1OrgChart, progress to the **Content and Code** group and tick **1OrgChart**.



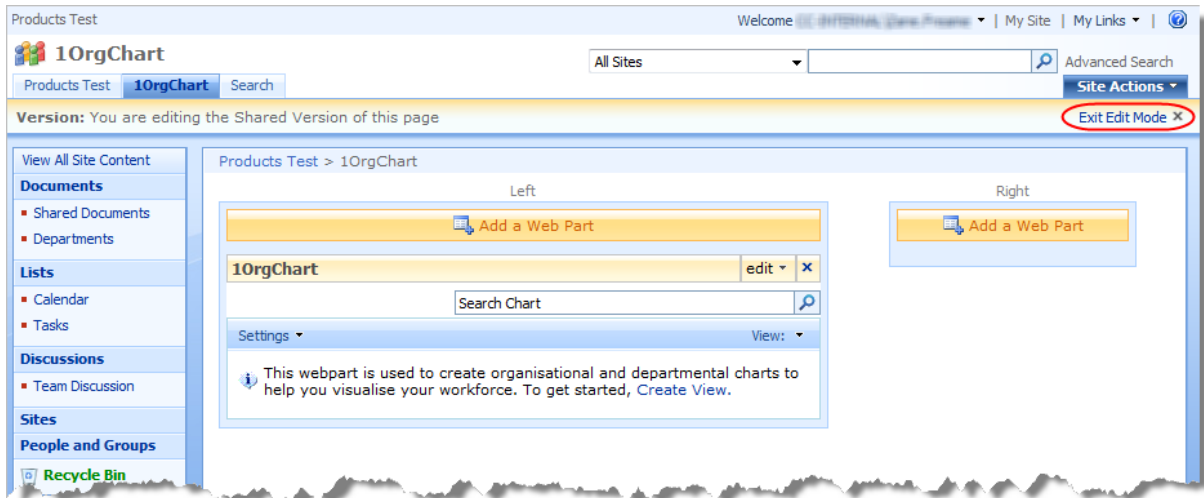
5. If you are upgrading to 4.2, progress to the **Content and Code** group and tick the second **1OrgChart** icon. If you have a situation where two web part icons appear, please remove the 1OrgChart by selecting **Site Settings > Web Parts > 1OrgChart.dwp**



6. Click **Add**.

Note: Alternatively, you can and drag and drop the web part into the zone.

7. Click **Exit Edit Mode**.



The 1OrgChart web part has now been successfully added to the page. You can now create one or more views of people within your organisation.

7 Upgrade 1OrgChart

Important: To ensure that custom profile lists are transferred correctly; be sure to create a copy of the user profile information as deactivating the product before the upgrade will replace the existing list with a new list.

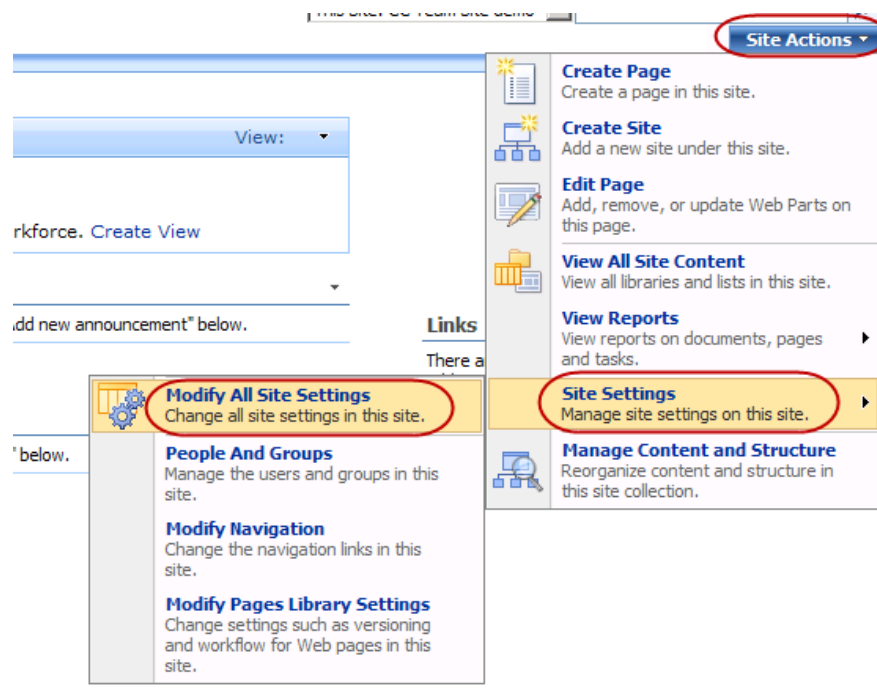
If you're upgrading from an earlier release than 4.0.1.9, please upgrade to 4.0.1.9 first.

7.1 Deploy the Solution

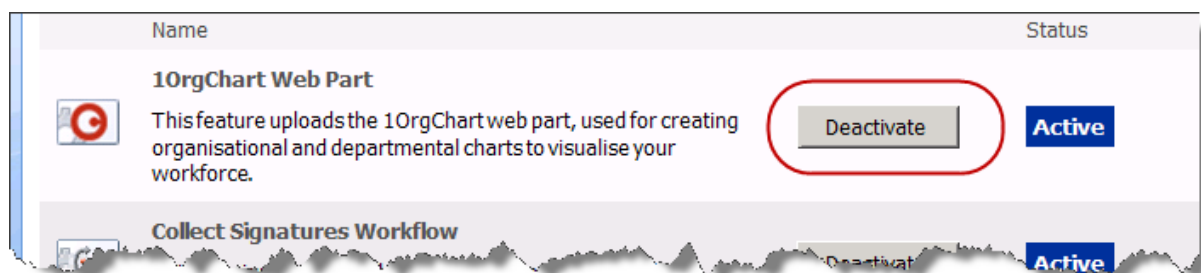
Follow these steps upgrade a previous version of 1OrgChart to version 4.

Important: To upgrade from a previous version of 1OrgChart to version 4 requires a new license key. If you do not have a 1OrgChart version 4 license please contact Content and Code. If you do not want to upgrade 1OrgChart click **Abort**.

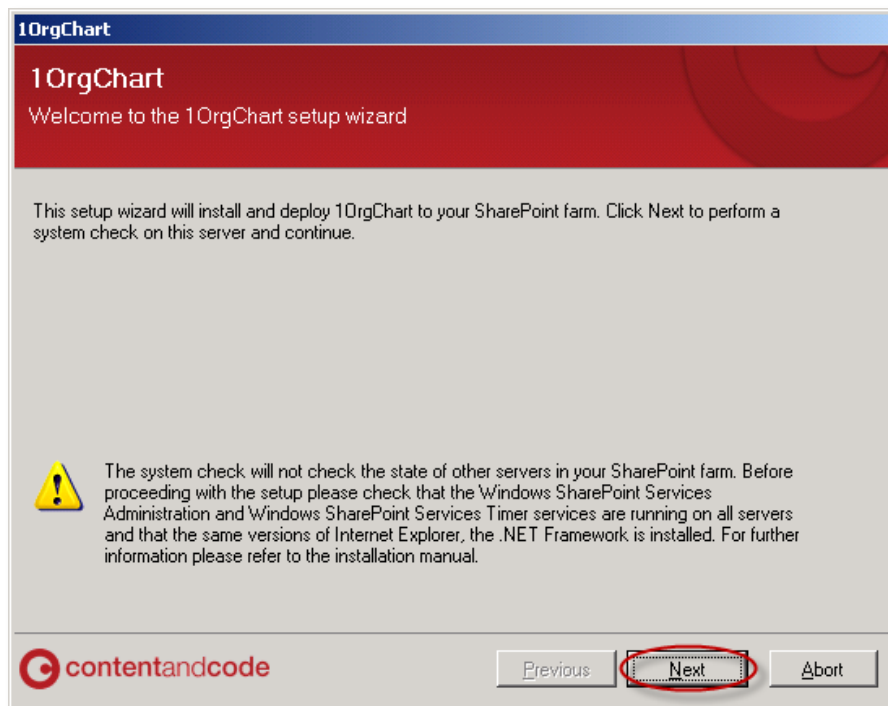
1. On the **Site Settings** menu, click **Site Settings > Modify All Site Settings**



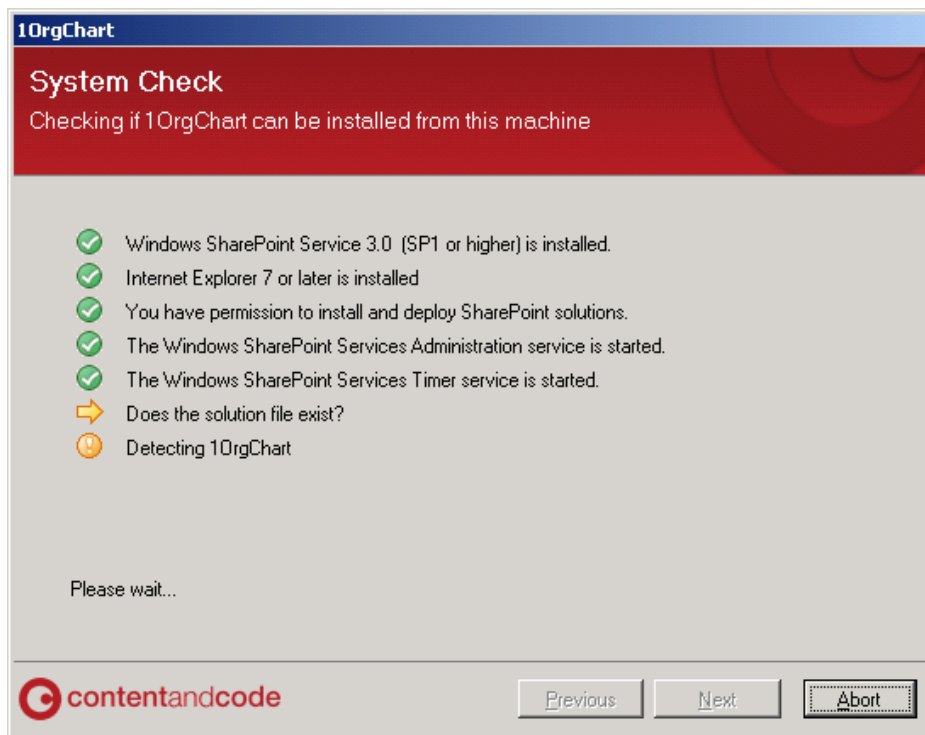
2. In the **Site Collection Administration** section, click **Site Collection Features**
3. Locate the **1OrgChart Web Part** and select **Deactivate**



4. Open 1OrgChart.Setup.exe

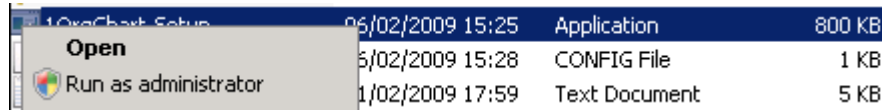


1. Click **Next**




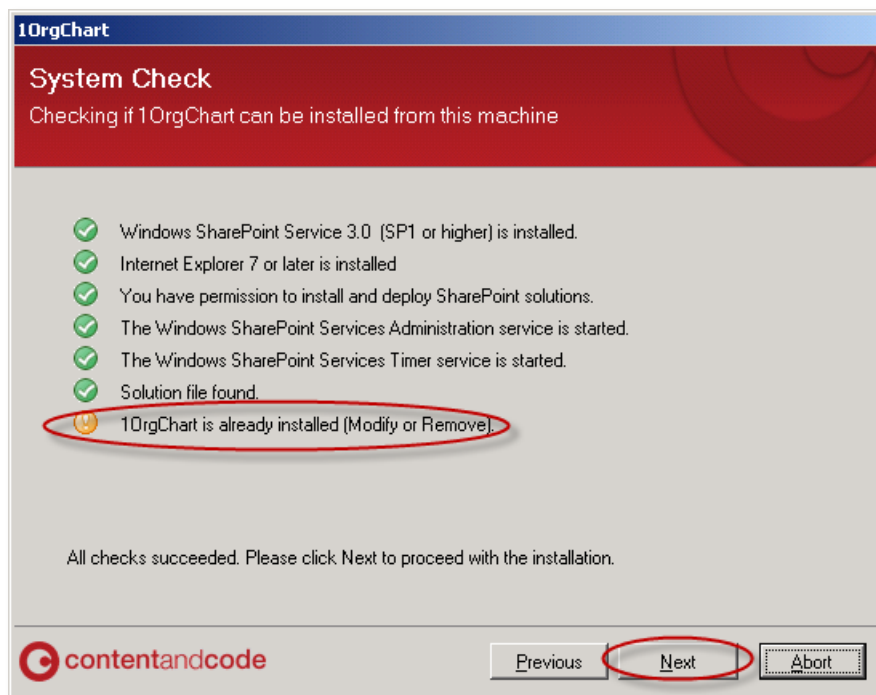
2. The setup will perform a system check to ensure the server meets the installation requirements. If one of the checks fails, simply abort the installation, and then resolve the issue before running the setup again.

Important: When installing to a SharePoint farm running on **Windows Server 2008** with **User Account Control (UAC) enabled**, the installation permissions must be **elevated** using the Right-click > Run as administrator option (see below)



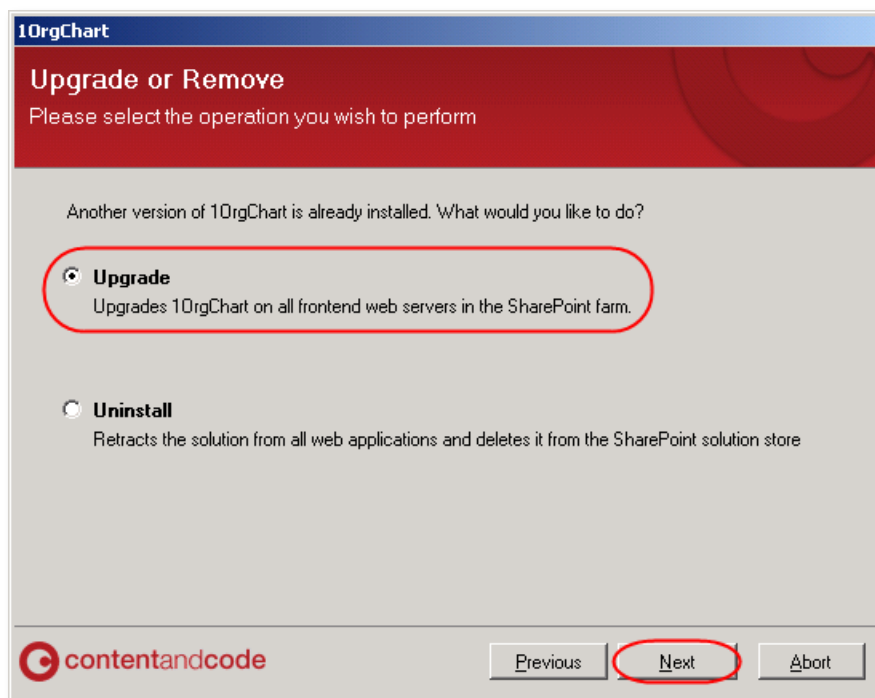
Failure to do so will result in a System Check error for the Windows SharePoint Service Timer service check.

3. If a previous version of 10OrgChart is installed you will see an exclamation symbol  displayed for the **Detecting 10OrgChart** system check.

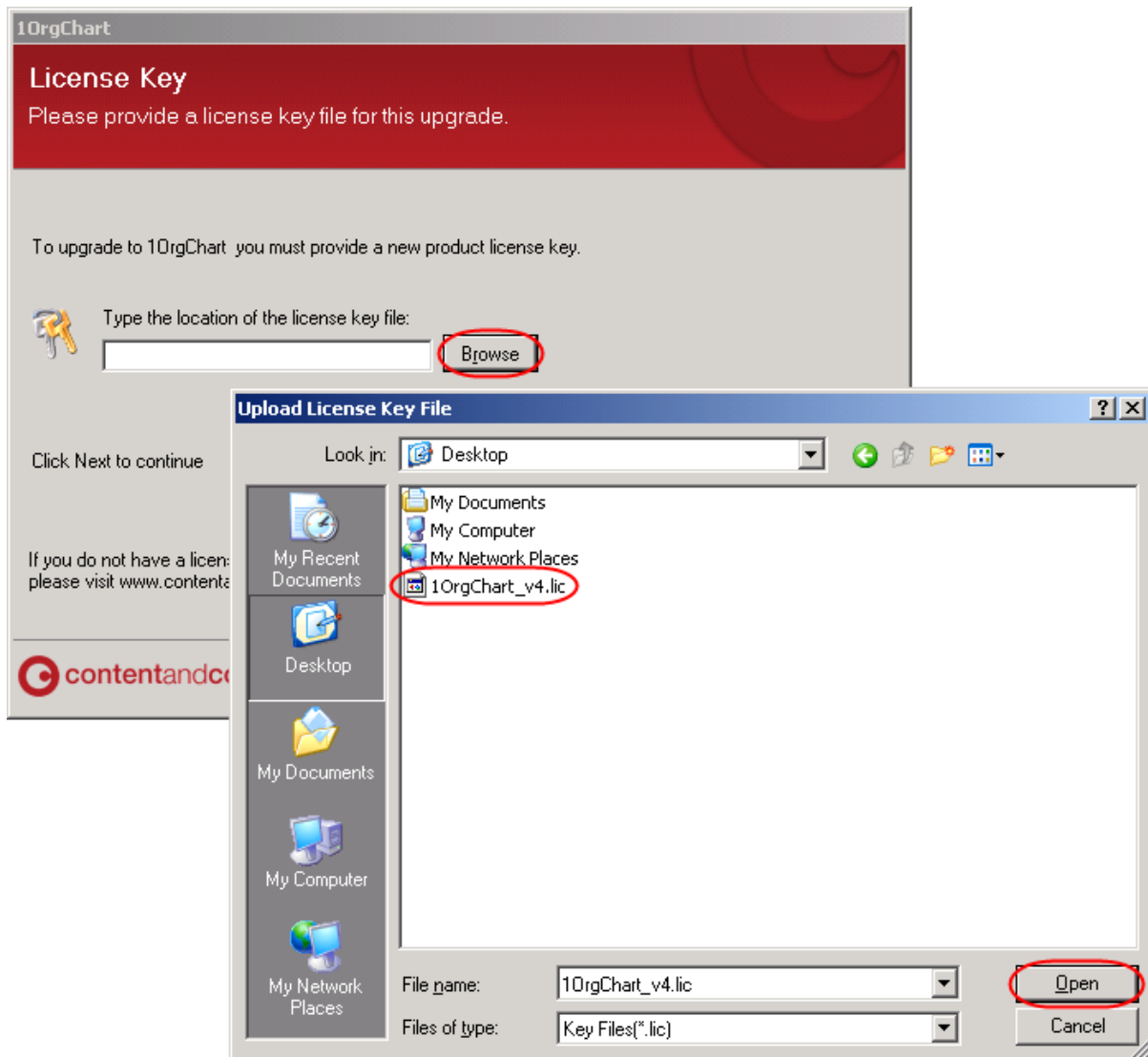


4. Select the **Upgrade** option

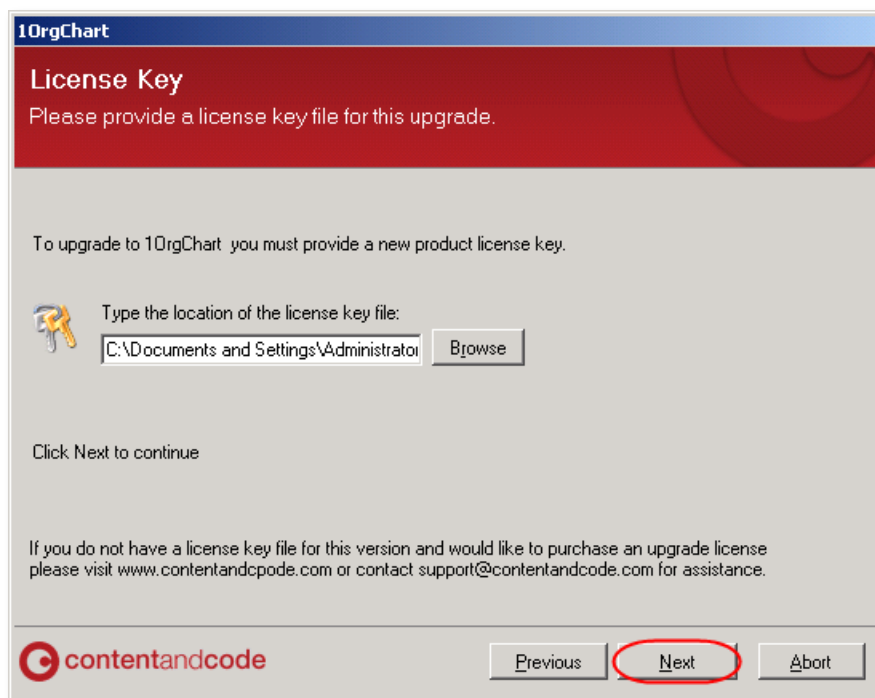
5. Click **Next**



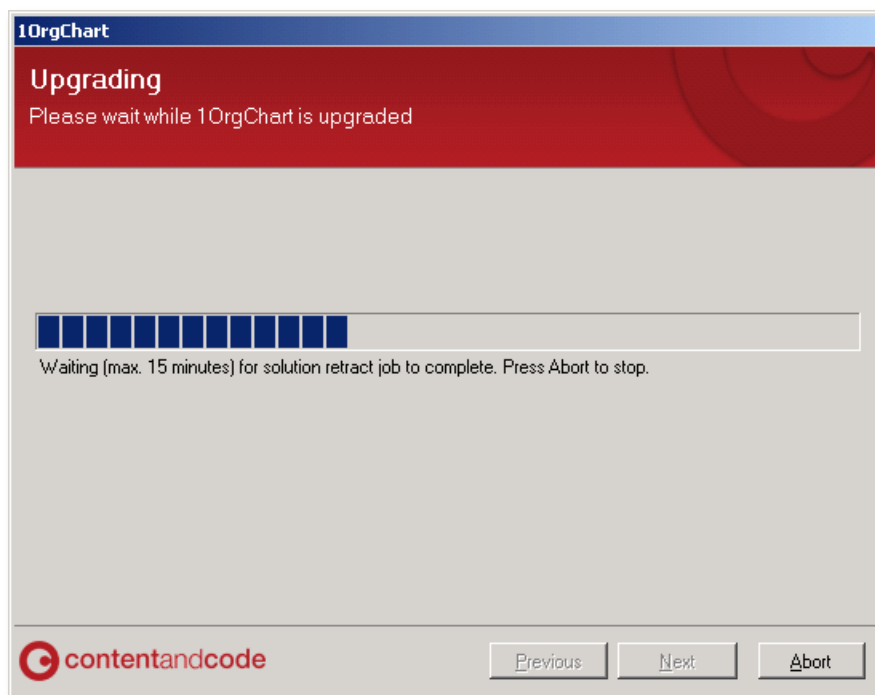
6. Click **Browse**
7. Locate the license key file (with .lic file extension) and click **Open**



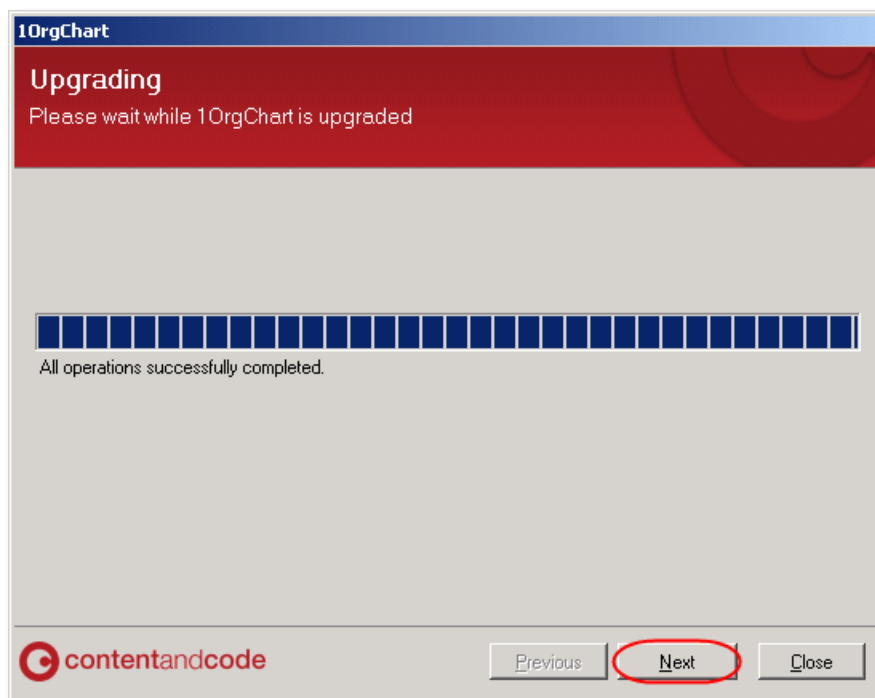
8. Click **Next**



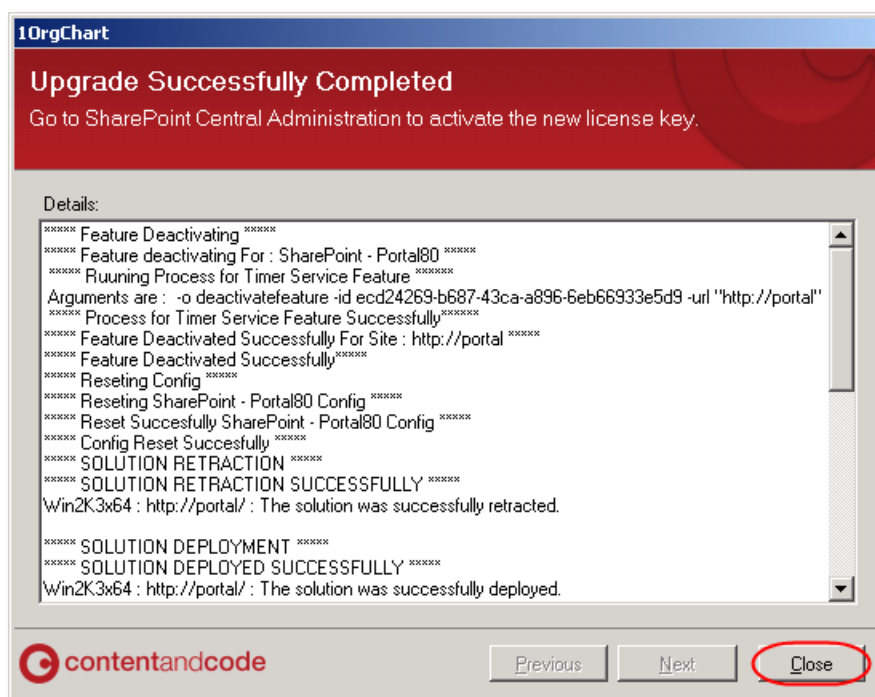
9. The installer will upgrade 10rgChart and apply the license key



10. When the install is complete, click **Next**



11. Click Close to complete the installation.



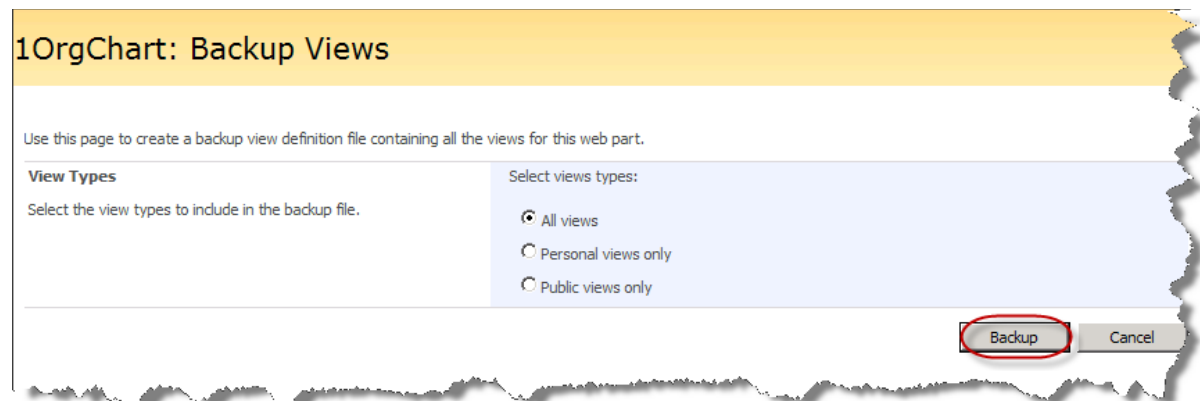
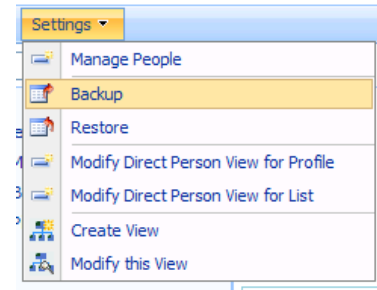
8 Backup and Restore

8.1 Backup

To export one or more views created within 1OrgChart, follow these steps.

1. From the **Settings** menu, select **Backup**
2. Select the desired view to be exported
3. Click **Backup**
4. Save the **View Definition** file (with file extension **.1vd**)

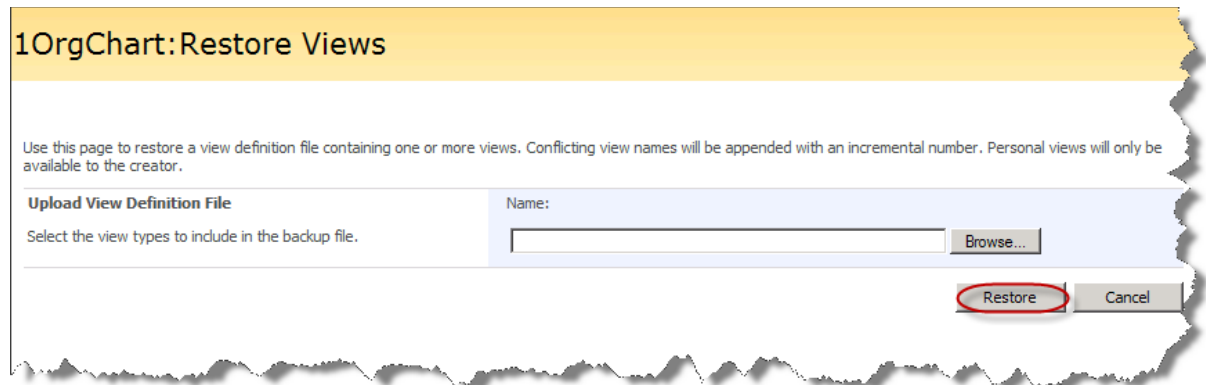
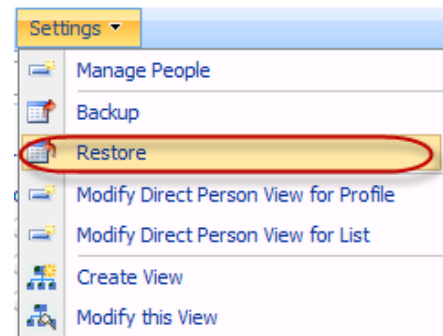
The exported file can now be used to import the View data into an upgraded version of 1OrgChart.



8.2 Restore

To import one or more views created within 1OrgChart, follow these steps.

1. From the Settings menu, select Restore
2. Select the desired view to be exported
3. Click **Restore**

A screenshot of the '1OrgChart: Restore Views' page. The page has a yellow header with the title '1OrgChart: Restore Views'. Below the header, there is a text block explaining the purpose of the page: 'Use this page to restore a view definition file containing one or more views. Conflicting view names will be appended with an incremental number. Personal views will only be available to the creator.' Below this text, there is a section titled 'Upload View Definition File' with a sub-instruction: 'Select the view types to include in the backup file.' To the right of this section, there is a 'Name:' label followed by a text input field and a 'Browse...' button. At the bottom right of the page, there are two buttons: 'Restore' and 'Cancel'. The 'Restore' button is highlighted with a red oval.

Note: View Definition files can be exported and import between current or previous versions of 1OrgChart (requires 1OrgChart version 4.0.1.9 or higher for both import and export).

8.3 Activate the Product License Key

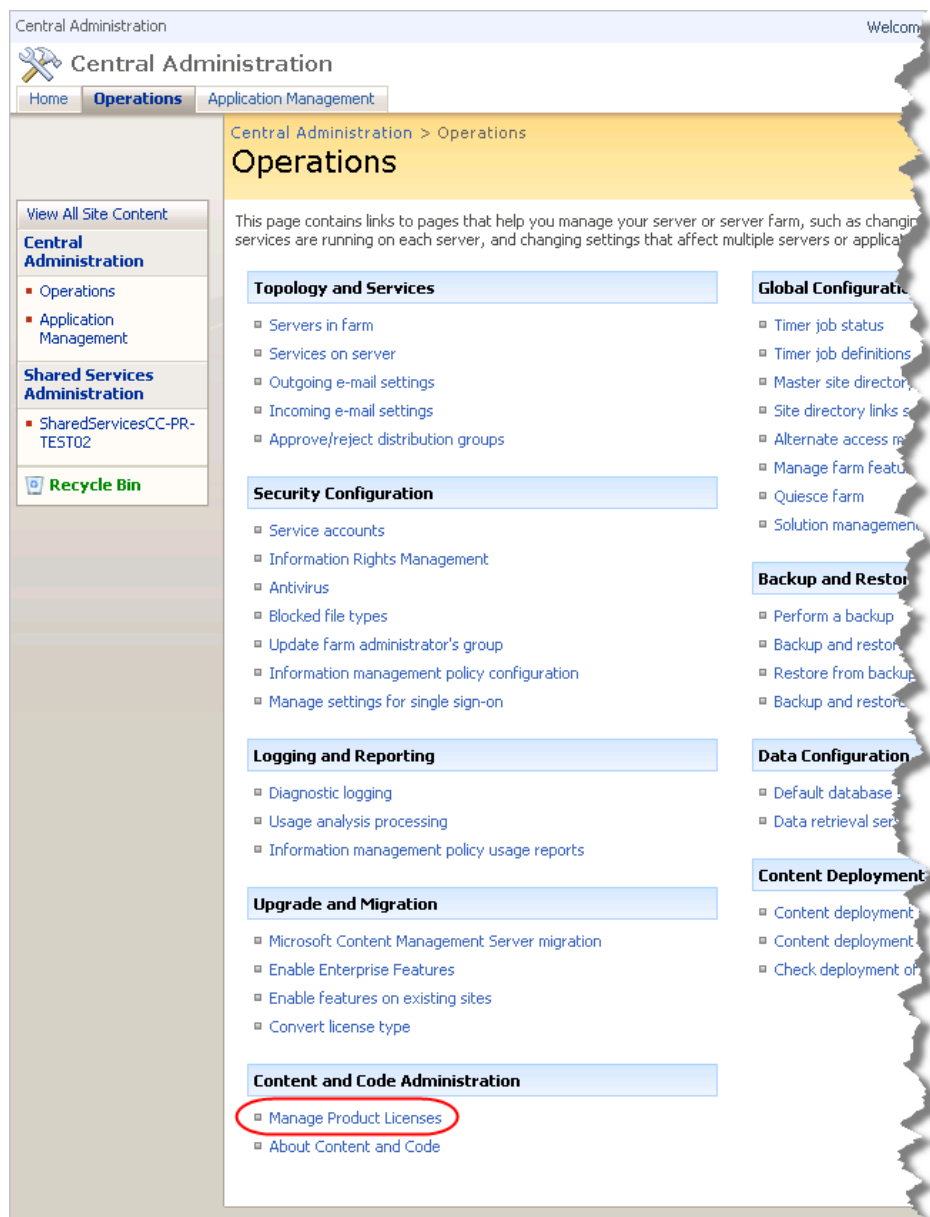
The following steps will take you through the process of activating the product license key. The product license key must be registered online before the product is fully activated.

Important: If your SharePoint server does not have access to the internet then you will not be able to activate the product using a standard license key.

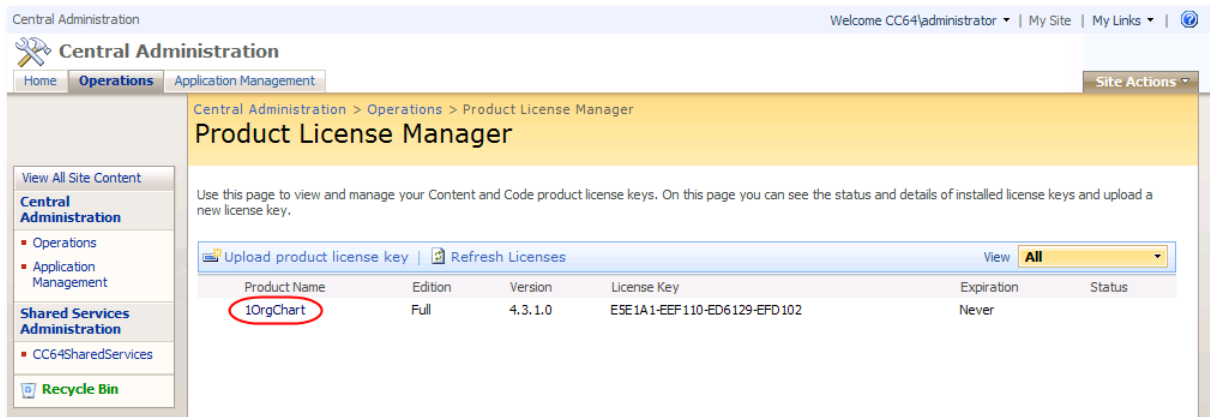
To activate your product offline you will need to request a new offline key by following the steps in section **5.2.3 – Offline Activation**.

To activate the product license key:

1. In **SharePoint Central Administration** click the **Operations** tab
2. Below the **Content and Code Administration** section click **Manage Product Licenses**



3. Click **10rgChart**



Central Administration > Operations > Product License Manager

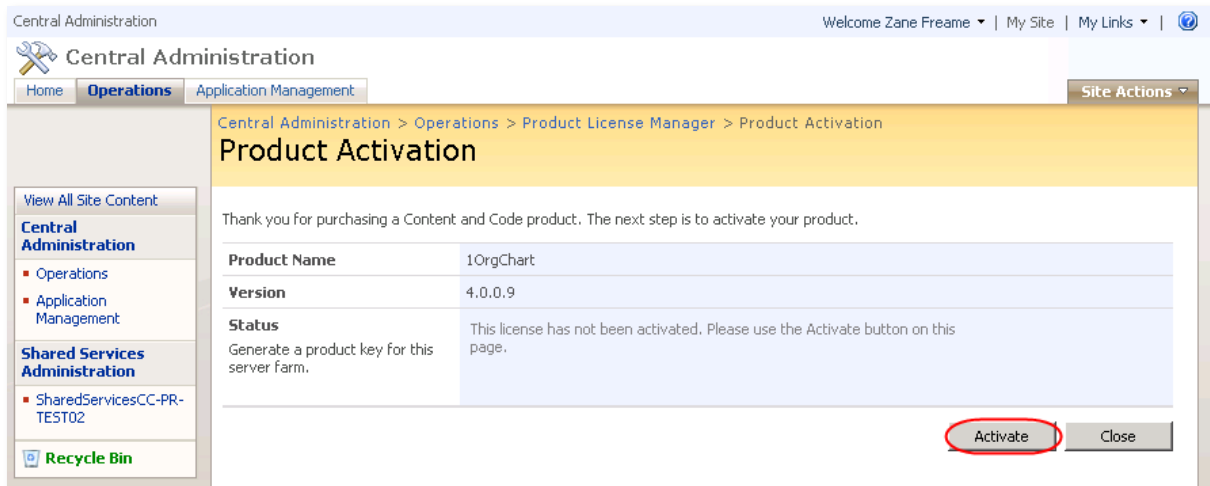
Product License Manager

Use this page to view and manage your Content and Code product license keys. On this page you can see the status and details of installed license keys and upload a new license key.

[Upload product license key](#) | [Refresh Licenses](#) View **All**

Product Name	Edition	Version	License Key	Expiration	Status
10rgChart	Full	4.3.1.0	ESE1A1-EEF110-ED6129-EFD102	Never	

4. On the Product Activation page, click **Activate**



Central Administration > Operations > Product License Manager > Product Activation

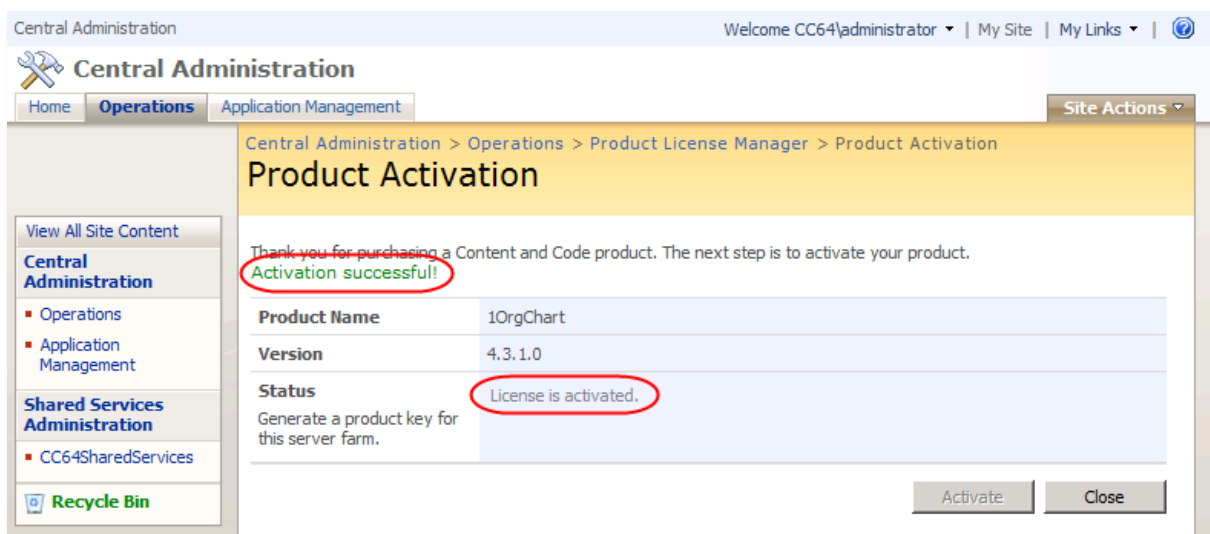
Product Activation

Thank you for purchasing a Content and Code product. The next step is to activate your product.

Product Name	10rgChart
Version	4.0.0.9
Status	This license has not been activated. Please use the Activate button on this page.

[Activate](#) [Close](#)

5. Check the status to see whether license was successfully activated.



Central Administration > Operations > Product License Manager > Product Activation

Product Activation

Thank you for purchasing a Content and Code product. The next step is to activate your product.

Activation successful!

Product Name	10rgChart
Version	4.3.1.0
Status	License is activated.

[Activate](#) [Close](#)

Congratulations! The product has been activated. Please proceed to section 0 -

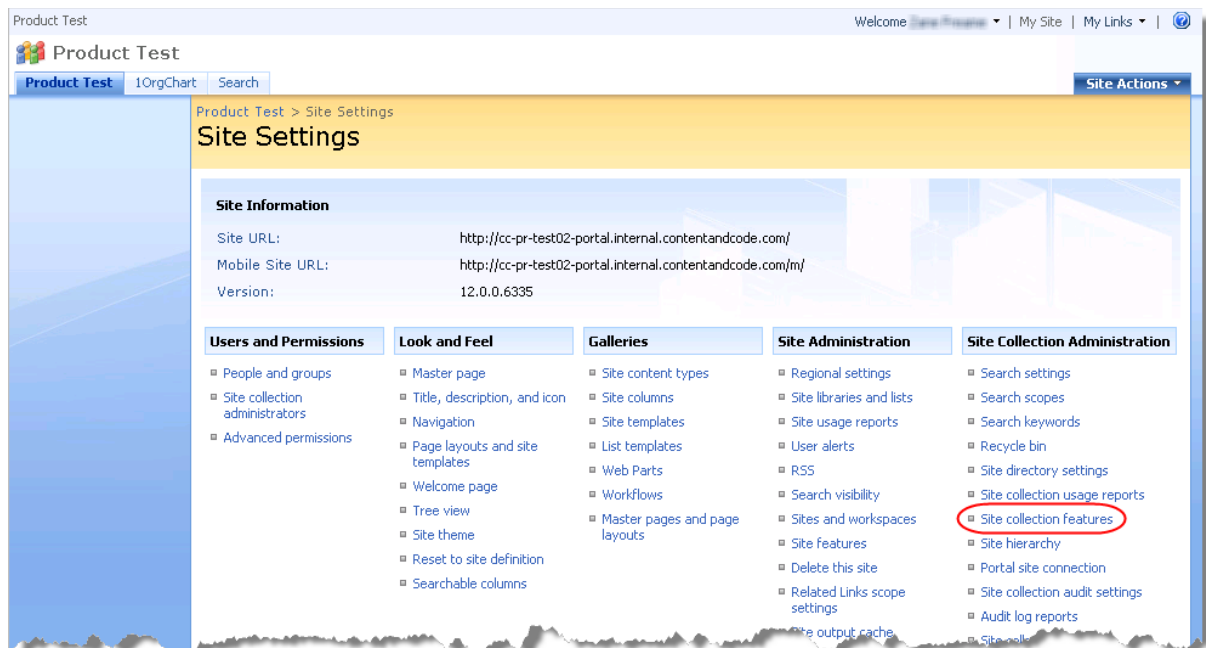
Configure 10rgChart to complete the installation.

9 Uninstall 1OrgChart

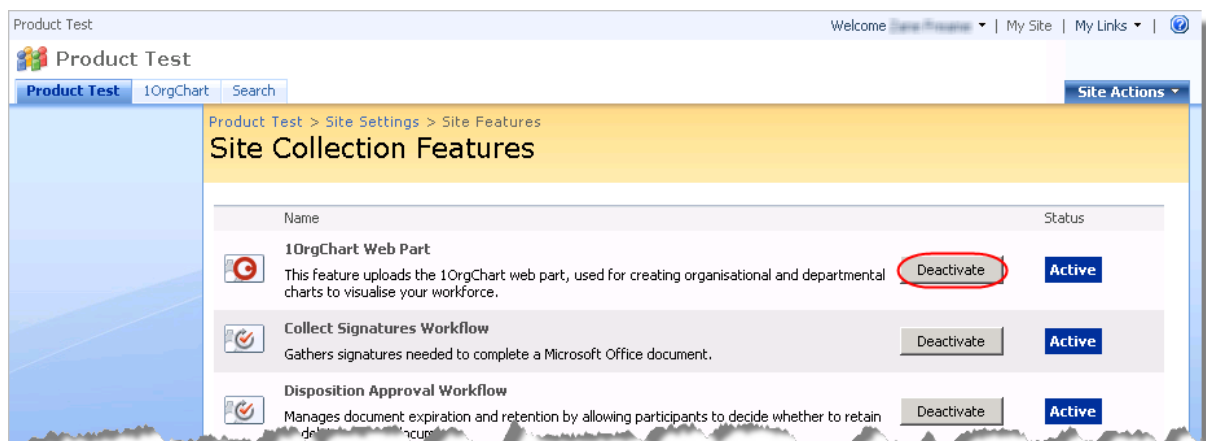
9.1 Deactivate the Feature

To prevent users from adding additional 1OrgChart web parts to your pages, you can deactivate the 1OrgChart feature. This will remove the web parts from the web part gallery but existing instances (i.e. web parts that have already been added to a page) will continue to function.

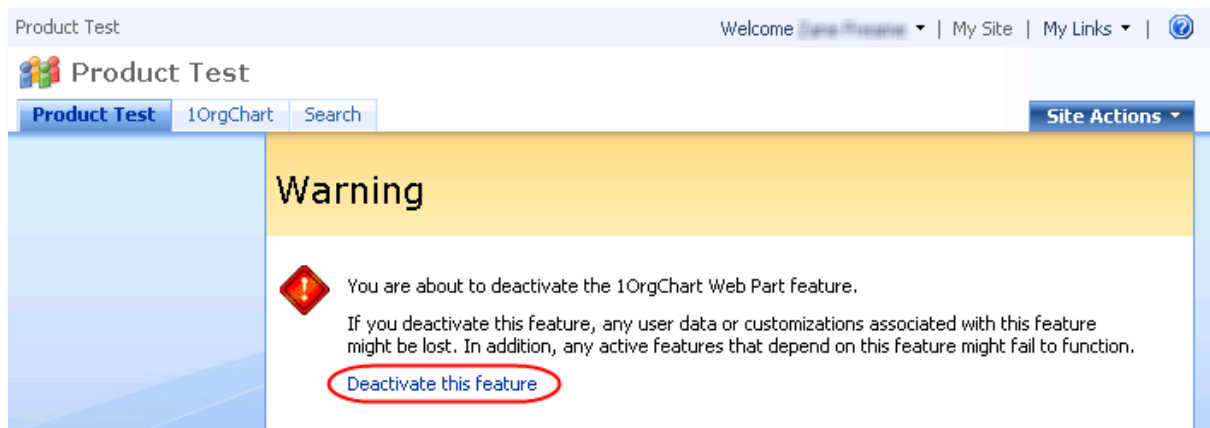
1. Open the top level site in your site collection
2. Go to **Site Actions > Site Settings > Modify All Site Settings**
3. Below the section **Site Collection Administration**, click **Site Collection Features**



4. For the 1OrgChart feature, click **Deactivate**



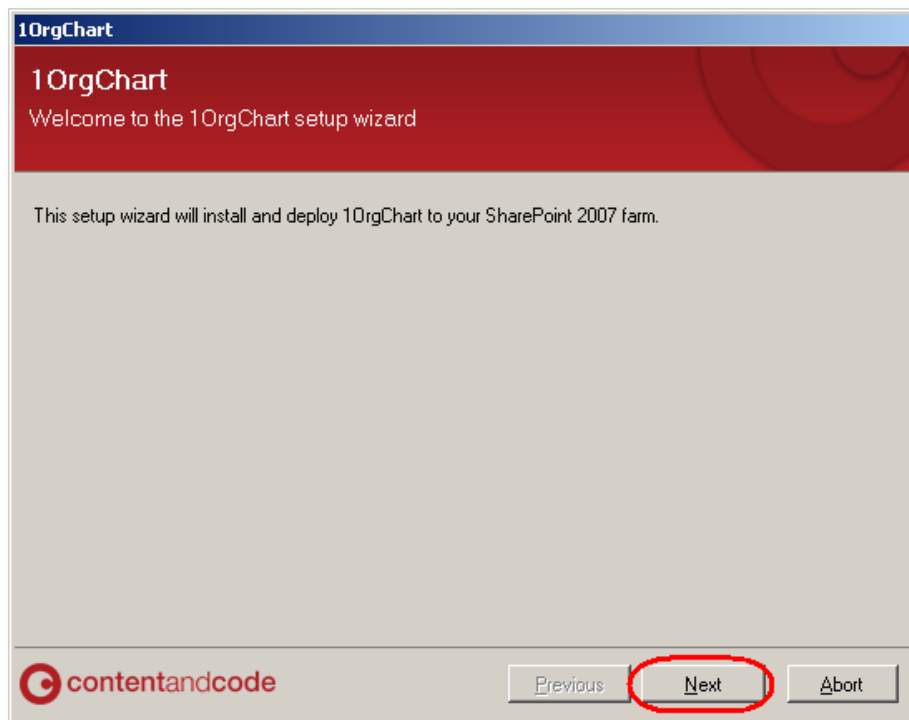
5. When prompted with a warning, click **Deactivate this feature**



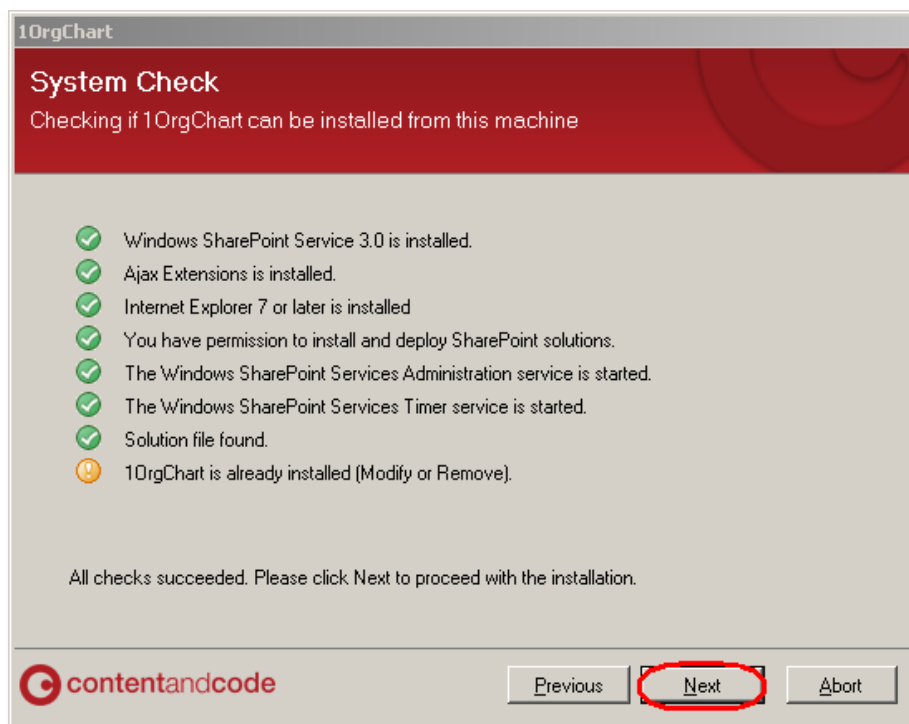
9.2 Uninstall the Solution

To completely un-install 1OrgChart from your farm, log on to the server from which you installed 1OrgChart and locate your installation file and follow these steps.

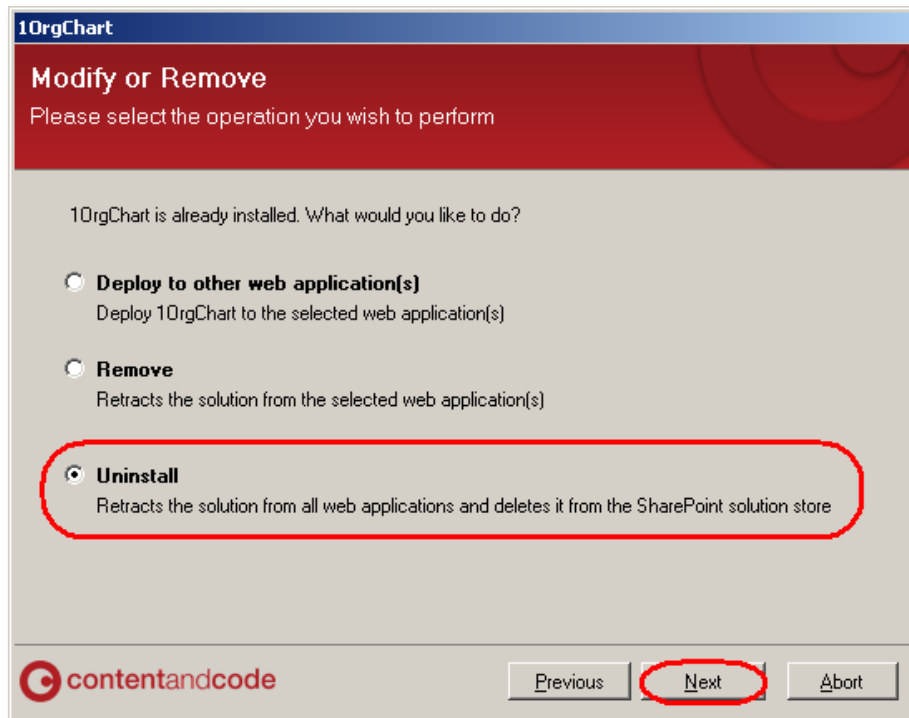
1. Run **1OrgChart.Setup.exe**
2. Click **Next**



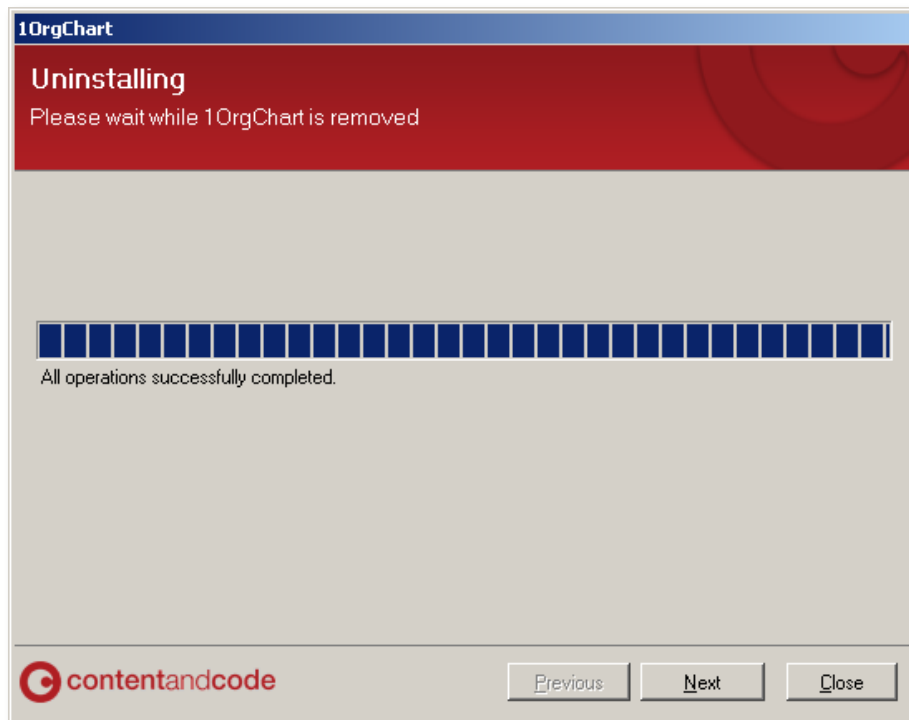
3. Once the System Check completes, click **Next**



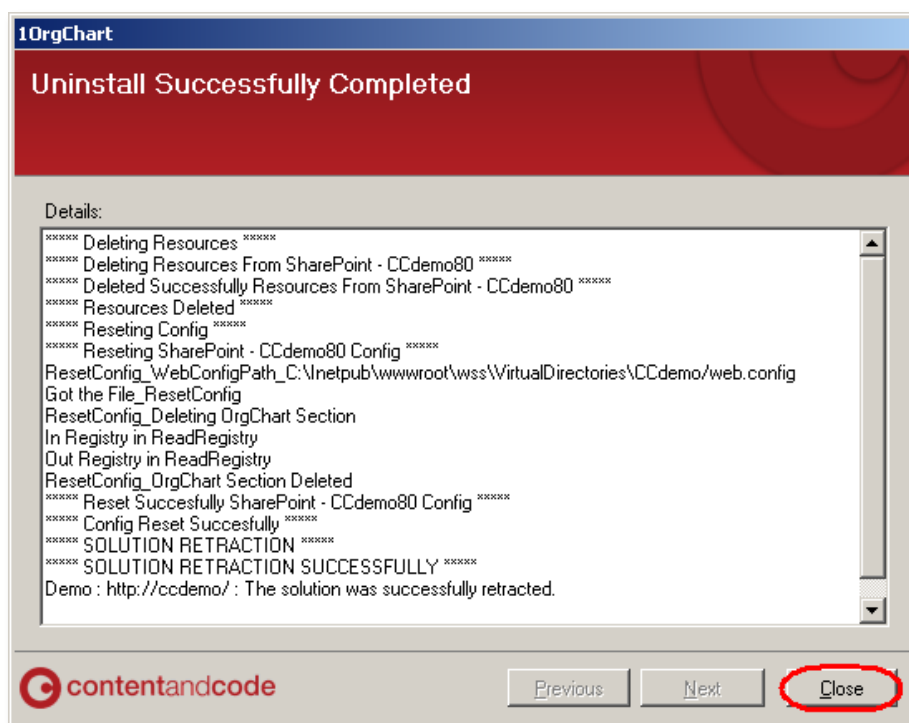
4. Select **Uninstall**
5. Click **Next**



6. Once the uninstall is complete, click **Next**
7. The details of the uninstall procedure will be displayed



8. Click **Close**



Note: Any 10rgChart web parts that have been added to your site must be deleted manually.