

# OrgPublisher Print and PowerPoint



## **OrgPublisher 10 Training**

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## 1 Print Defaults Set by the Chart Administrator

OrgPublisher provides many options for the user to layout print pages as they desire. The layout techniques are for print output as well as output sent to PowerPoint. As the chart administrator, you can set up some defaults that will make printing easier for the viewers of the published chart.

**Please note:** The options and examples shown in this manual are just one result of the many combinations of options you can use to make the page look the way you need prior to printing. Various results are available because of this and you are *not* limited to the combinations we have used for illustration.

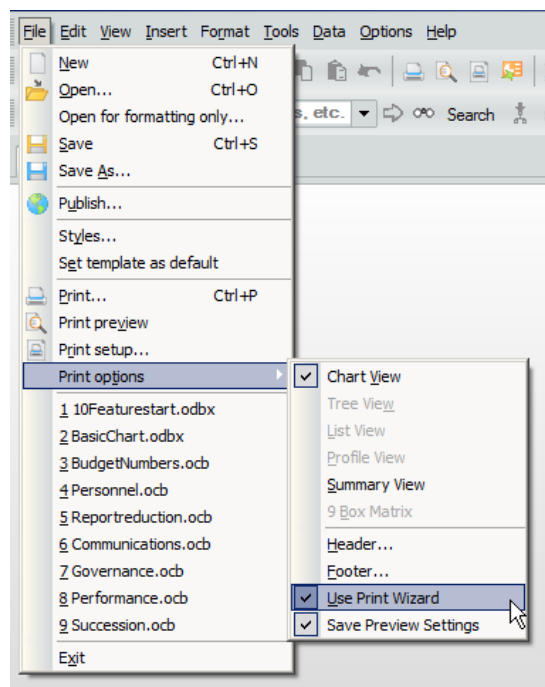
### 1.1 Print Wizard Option

The Print Wizard provides options to the user as they prepare to print. By default, the Chart View is printed when the print button is selected. When the Print Wizard is enabled by the chart administrator, the user is prompted to select any visible View for printing. Possible options:

- |                 |                      |
|-----------------|----------------------|
| a. Chart View   | d. Tree View         |
| b. List View    | e. Chart View        |
| c. Profile View | f. 9 Box Matrix View |

#### 1.1.1 Activate the Print Wizard

1. Click File, then Print Option
2. Click to check mark Use Print Wizard

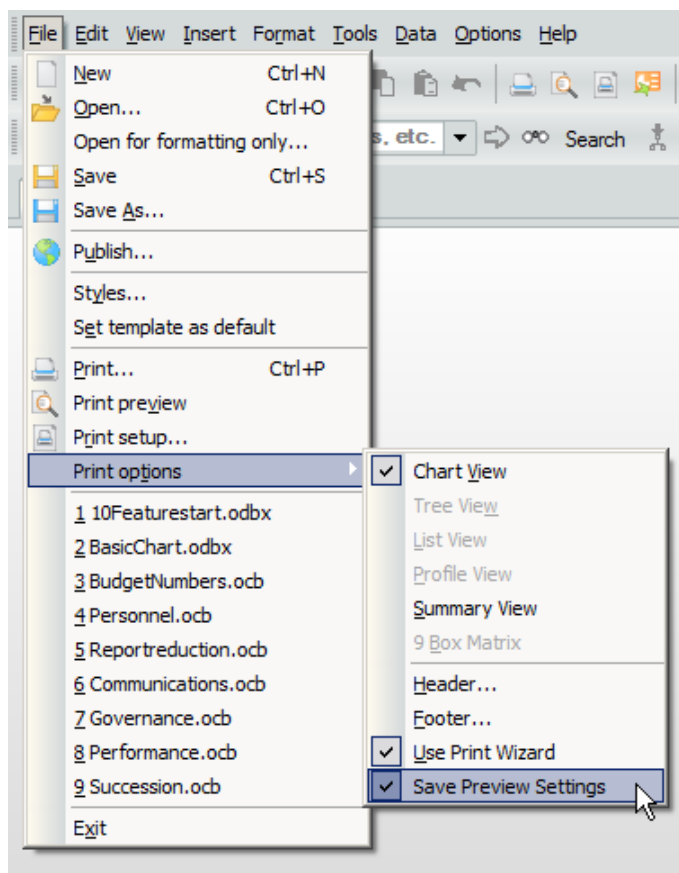


## 1.2 Save Preview Settings

OrgPublisher Print Preview functionality provides the user many options for formatting the page output prior to sending to the printer. The chart administrator can preview the output, make modifications to the page layout, set page breaks, set defaults for whether an index prints, etc. If the Save Preview Settings option is enabled, the administrator's settings will become part of the published chart (PluginX and EChart Rich Client)

### 1.2.1 Activate the Save Preview Settings Option

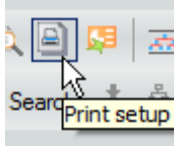
1. Click File, then Print Option
2. Click to check mark Save Preview Settings



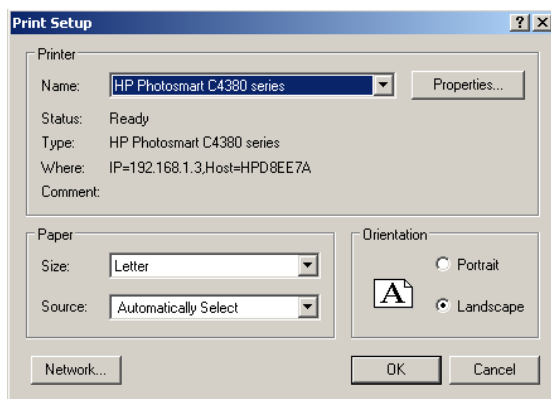
## 2 Print Setup

Prior to printing, you should setup the printer information. If this is not done, then your output will go to your default printer using the default settings.

1. Select Print Preview



2. This screen and the options will vary based on print drivers. Make changes as necessary. These changes will be reflected when you print or go to Print Preview.

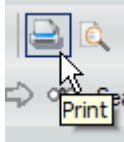


### 3 Using the Print Wizard

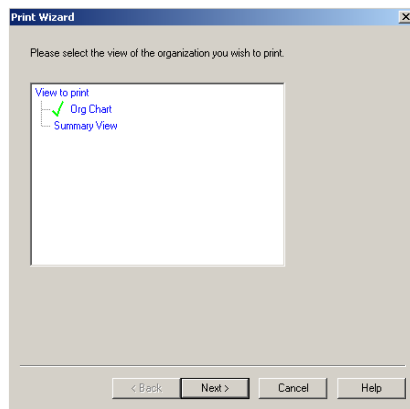
If the Print wizard is activated, when the user clicks the Print button, they will be prompted to select the desired output.

**Please note:** When printing the Org Chart, it is highly recommended that you launch Print with Print Preview. You can manipulate the output prior to sending to the printer.

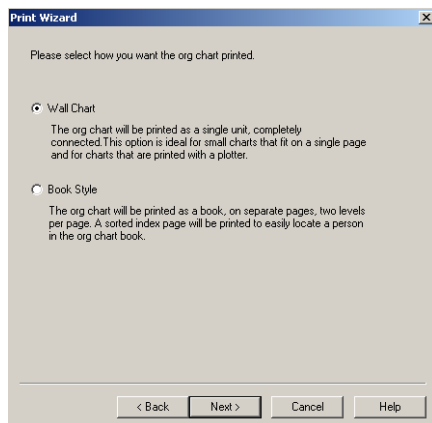
1. Click the Print button



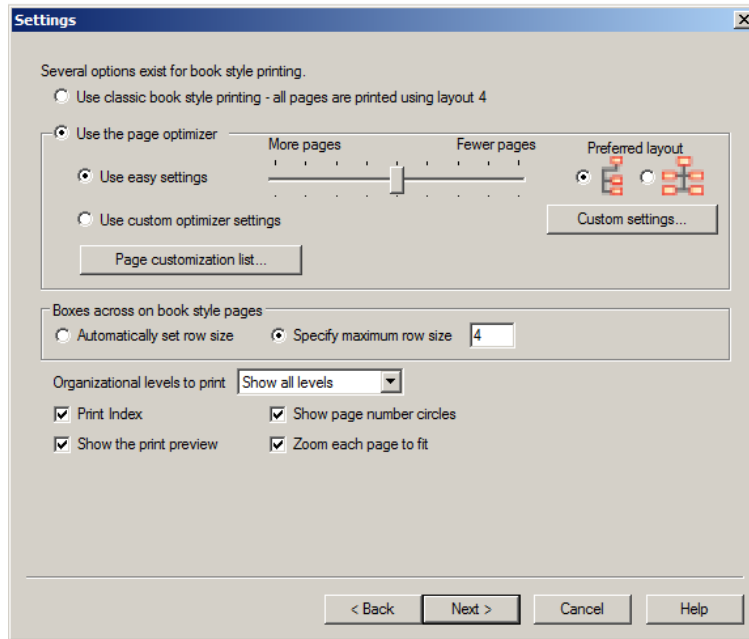
2. If the List, Profile, Tree, 9 Box or Summary View is open, you are prompted to select the desired output.



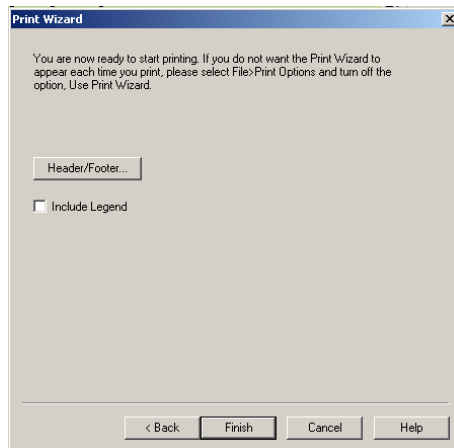
3. If Org Chart is selected, then choose output type - Wall Chart or Book Style (more information on these options described later in this manual)
4. If Wall Chart is selected, click Next and the next option will be to modify header and footer settings.



5. If Book Style is selected, the next screen provides Book Style setting options. Please refer to the Book Style printing section of this manual for more details,



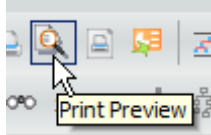
6. Define Header and Footer. If a Legend is in the chart, click to print the legend and then click Finish.



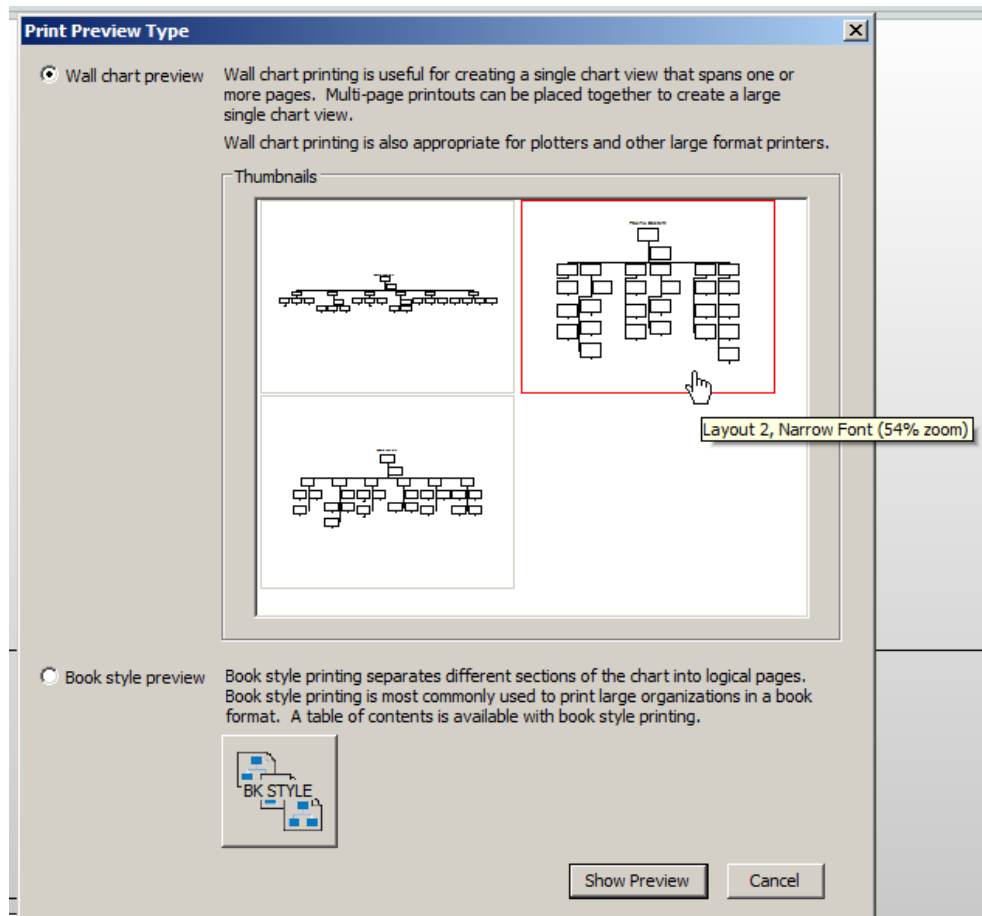
## 4 Wall Chart Print Preview

Wall Chart is the best option when you are sending the whole chart to a plotter or if you need to print a large section of the chart.

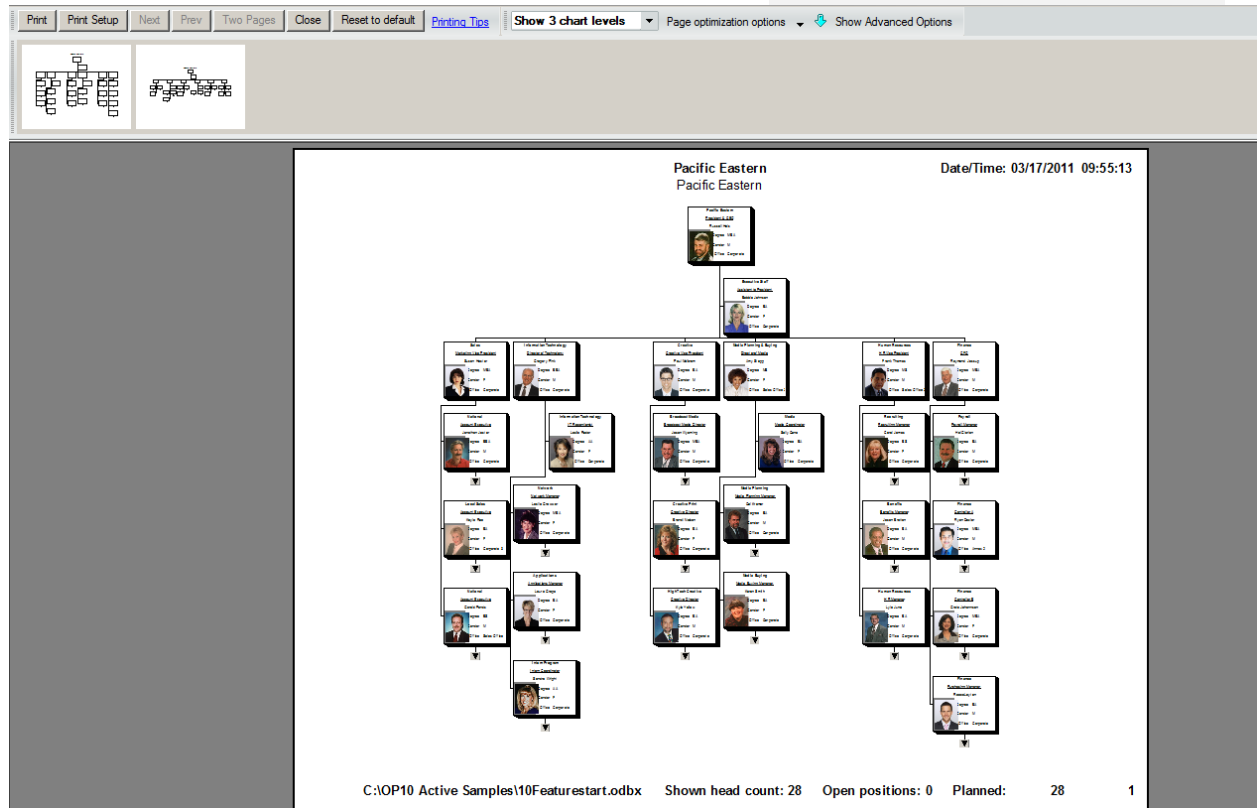
1. Select Print Preview



2. Select Wall Chart and the desired "look and feel" thumbnail you prefer. Mouse over each thumbnail for a description. Click on Show Preview.

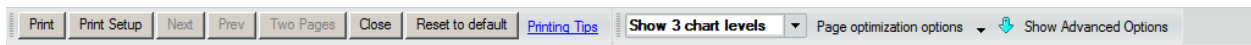


3. The chart preview opens using the settings applied when viewing the chart. You can adjust the settings to obtain the desired output.



## 4.1 Configure the Printed Page

Print Preview provides many options to control the printed page output. Toolbar buttons and examples of what they accomplish are provided below.



- **Print** – Send the output to the printer (as it is displayed in Print Preview)
- **Print Setup** – Launches your print driver so you can select desired printer, page layout, paper size, etc.
- **Next** – Active when the zoom is enlarged and the chart is printed across several pages. Click Next to see the next page
- **Prev** – Active when the zoom is enlarged and the chart is printed across several pages. Click Prev to see the previous page
- **Two Pages** – Active when the zoom is enlarged and the chart is printed across several pages. Click Two Pages to preview 2 pages at the same time.
- **Close** – Cancels print preview and takes you back to the chart.
- **Reset to Default** – This will undo your preview modifications and set it back to the initial settings.
- **Printing Tips** – Takes you to a help page for using Print Preview

- **Show Levels** – Change the number of levels displayed in the print preview

Broadcast Media Date/Time: 04/15/2011 09:39:08

Broadcast Media

Jason T Wyoming  
Phone: 1100  
Big Corporate  
Office No.: C000

Open Position

Television & Cable Creative: Max P Banzdorf (999, Big Corporate, C01)

Radio: Sandra R Hegemont (166, Big Corporate, C05)

Public Broadcast: J G Tylar (622, Big Corporate, C09)

Internal Creative: Harvey W Wayne (611, Big Corporate, C06)

10 Training Manuals/Chart Samples for Screenshots/OP9Printing.odbx Shown head count: 16 Open positions: 1 Planned: 1

Select a new display setting:

OP9Printing.odbx - OrgPublisher

Show 2 chart levels

Broadcast Media Date/Time: 04/15/2011 09:48:13

Broadcast Media

Jason T Wyoming  
Phone: 1100  
Big Corporate  
Office No.: C000

Open Position

Television & Cable Creative: Max P Banzdorf (999, Big Corporate, C01)

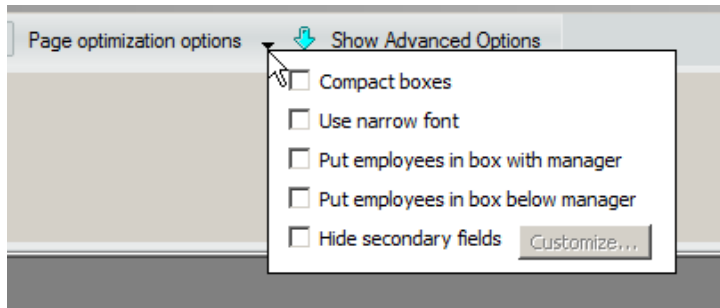
Radio: Sandra R Hegemont (166, Big Corporate, C05)

Public Broadcast: J G Tylar (622, Big Corporate, C09)

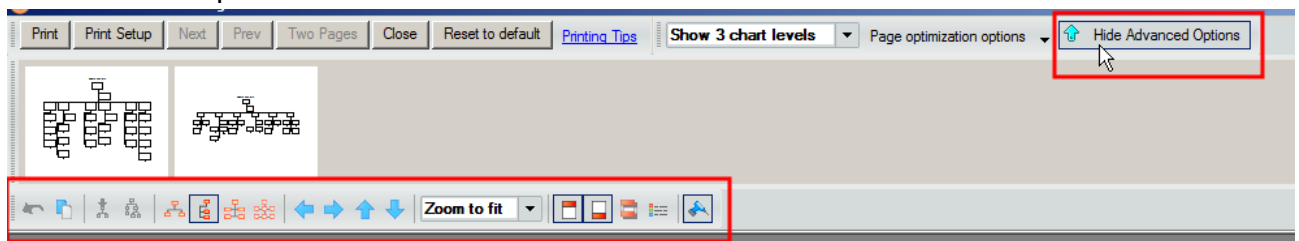
Internal Creative: Harvey W Wayne (611, Big Corporate, C06)

P10 Training Manuals/Chart Samples for Screenshots/OP9Printing.odbx Shown head count: 5 Open positions: 1 Planned: 1

- **Page optimization options** – Provides options to get more readable boxes on a page.



- **Show Additional Options** – This buttons displays buttons to provide additional modification options. Once activated, the button switches to Hide Advanced Options. The Advanced Options toolbar is outlined in red on the bottom left.



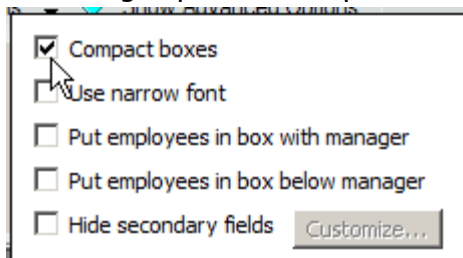
## 4.2 Page Optimization Options Detailed

There are 4 options available to reduce the height and width of the chart on a page. Each of these will create more “white space” on the page. This allows an increase in zoom which in turn will increase space utilized on the page and readability.

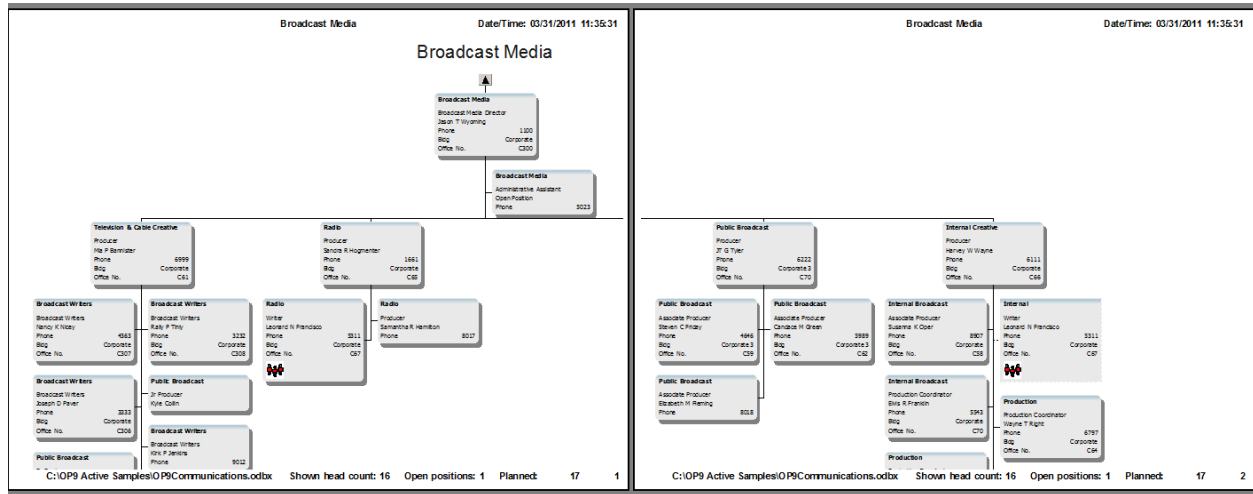
- Compact boxes
- Use narrow font
- Put employees in box with manager
- Put employees in box below manager
- Hide Secondary Fields

### 4.2.1 Compact Boxes

Select Page optimization options and then select Compact boxes

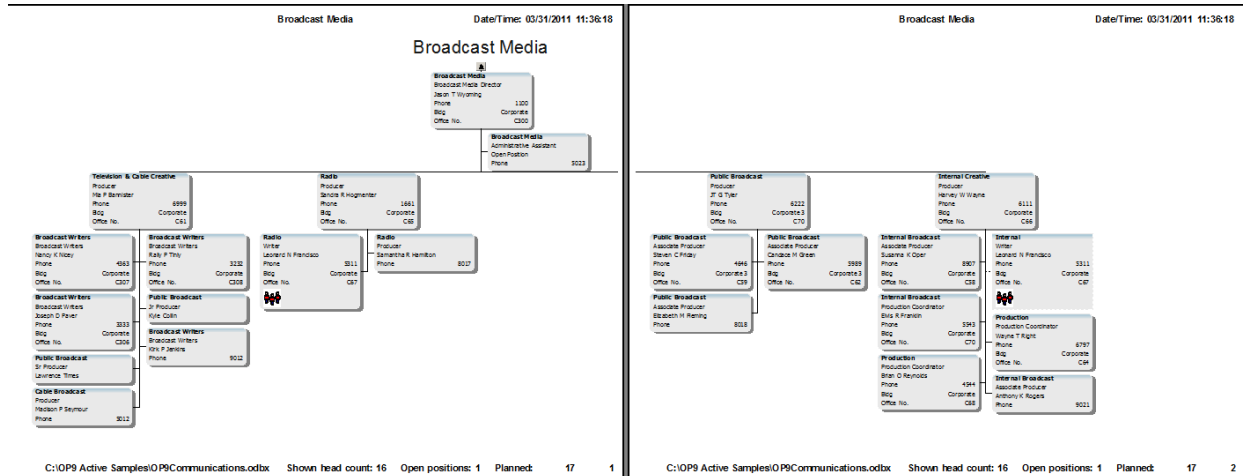


Before:



After:

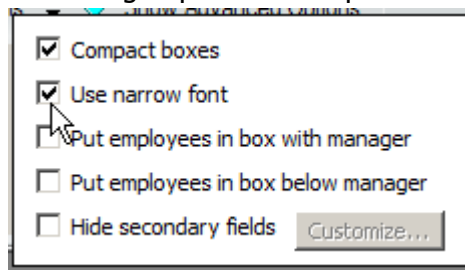
Unnecessary spacing removed from the chart boxes. Boxes no longer "drop off" of the edge of the page.



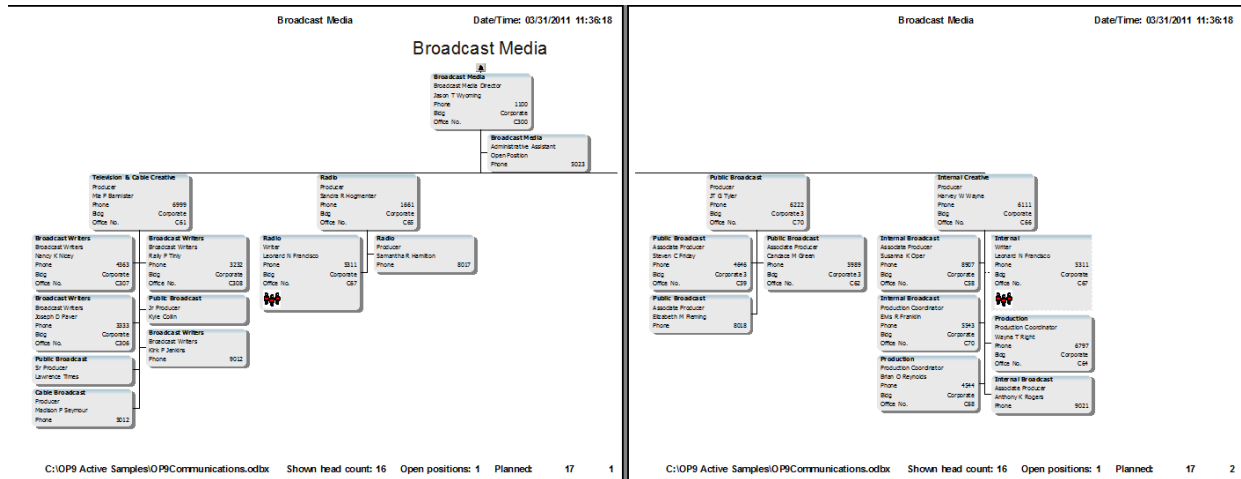
### 4.2.2 Use Narrow Font

Please note: The following example is using a combination of the Compact box and Narrow font option.

Select Page optimization options and then select Use narrow font

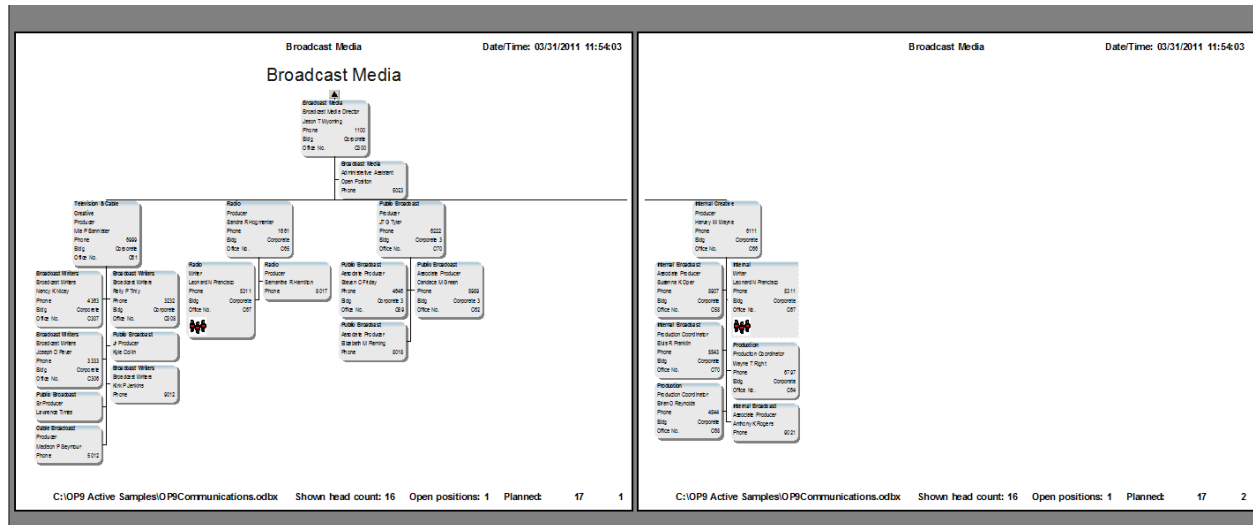


Before:



After:

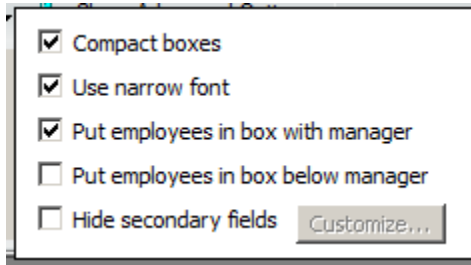
By applying the narrow font option, the width of each chart box is now reduced. Only one "arm" of the organization remains on the 2<sup>nd</sup> page.



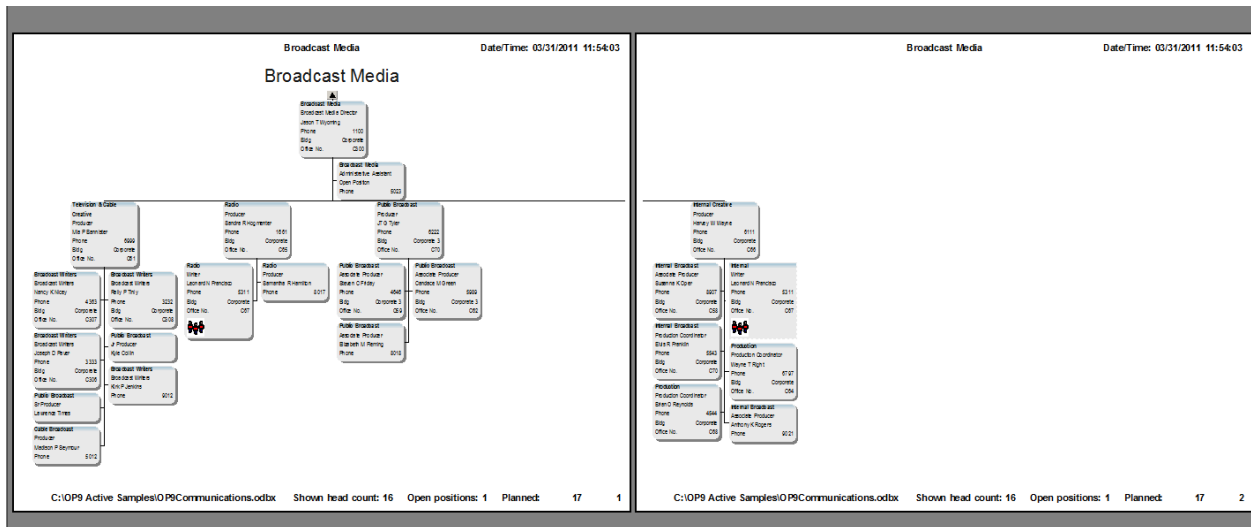
### 4.2.3 Put Employees in Box with Manager OR Box below Manager

Please note: The following example is using a combination of the Compact box, Narrow font and Put employees in box with manager **or** the below manager option. Only one of these options can be selected.

Select Page optimization options and then select Put employees in box with manager

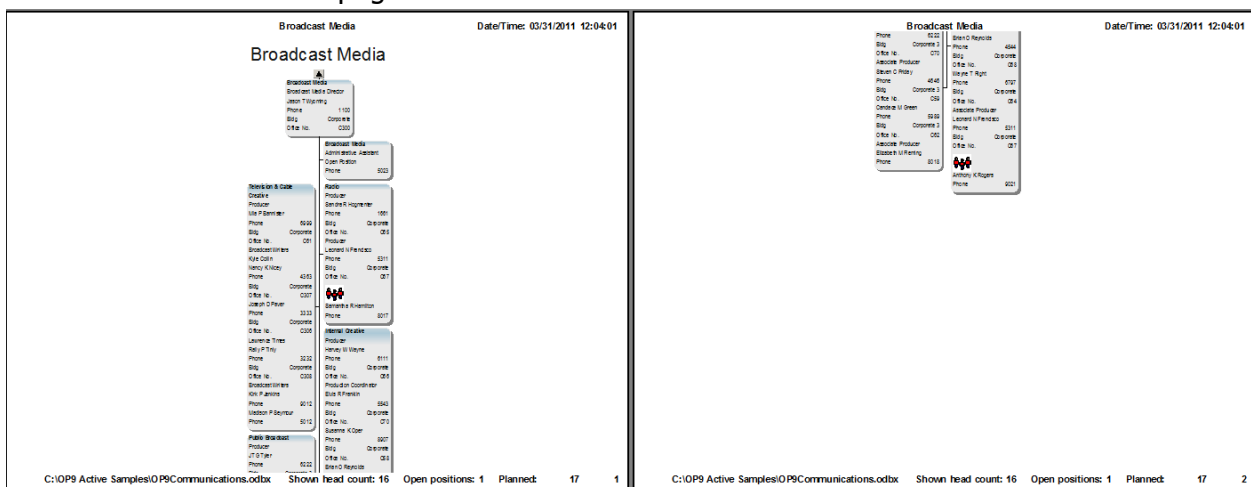


Before:

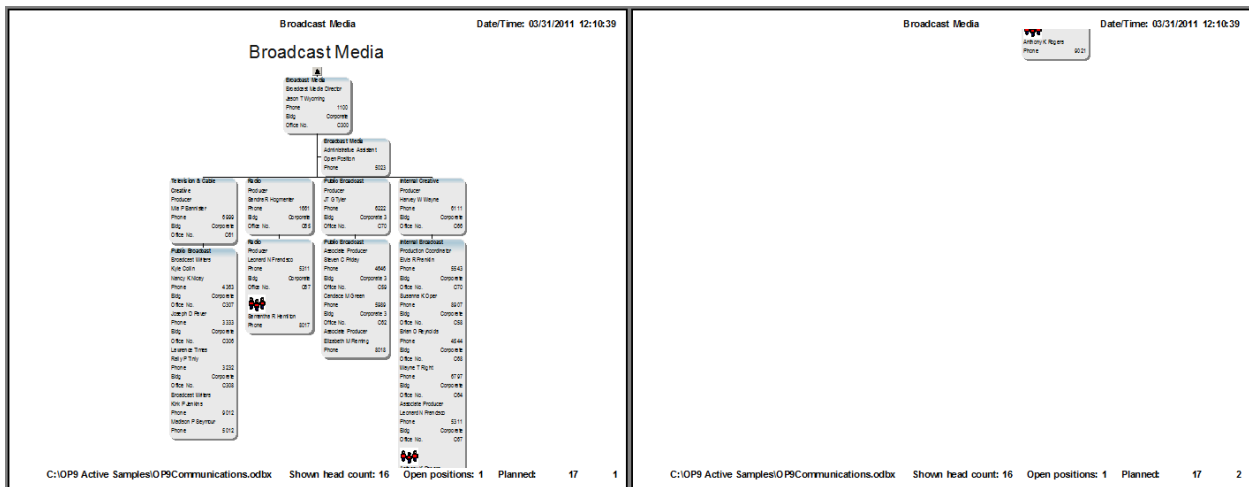
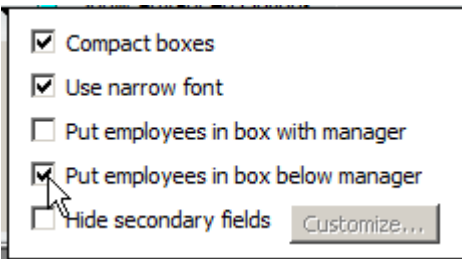


After:

By applying the Put employees in box with manager option, direct report boxes for Jason Wyoming now contain their direct reports. The direct report boxes are stacked side-by-side and now flow over to another page.



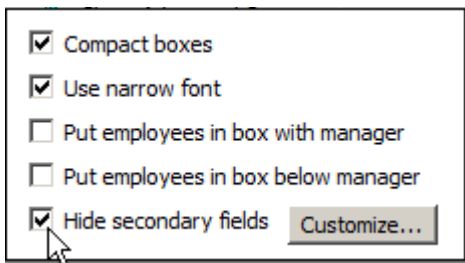
After Switching to Put employees in box below manager option, the direct report boxes are presented horizontally and their direct reports appear in a box below. One organization is spilling over to a second page.



## 4.2.4 Hide Secondary Fields

Please note: The following example is using a combination of the Compact box, Narrow font and the Hide secondary fields option. The Hide secondary fields option let's you remove unnecessary fields for printing. It is not available with the Put employees in box with manager or below manager option.

Select Page optimization options and then select Hide secondary fields. There is a Customize option now available.



Before:  
Custom Fields are displayed in the chart boxes.

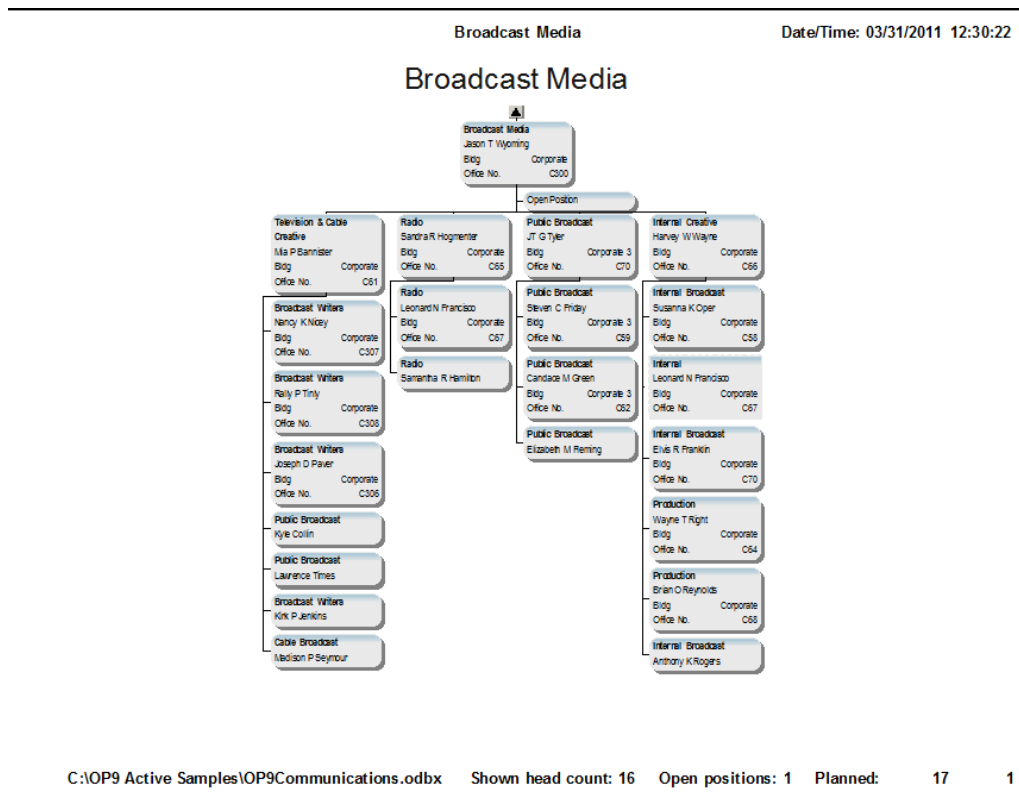
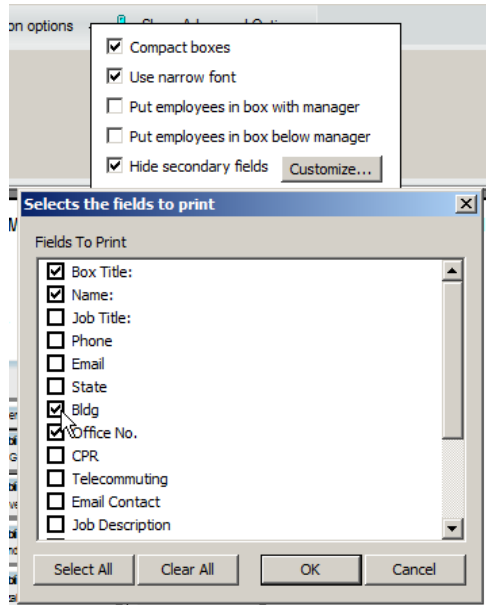
The screenshot shows a 'Broadcast Media' chart with a date/time of 03/31/2011 12:18:48. The chart area is filled with numerous overlapping boxes, each containing contact details for various individuals. For example, one box lists 'Broadcast Media' with 'Broadcast Media Director' and 'John T. Young'. Another box lists 'Broadcast Media' with 'Administrative Assistant' and 'Cynthia'. The chart is cluttered, with many boxes overlapping each other, making it difficult to read the information. At the bottom of the chart, it says 'C:\OP9 Active Samples\OP9\Communications.odxb' and 'Shown head count: 16 Open positions: 1 Planned: 17 1'.

After:  
All Custom Fields are hidden and the chart fits on one page, if the Customize button is not utilized.

The screenshot shows the same 'Broadcast Media' chart with a date/time of 03/31/2011 12:20:48. In this version, all the custom fields that were visible in the previous screenshot are hidden. The chart area is now much cleaner, with only the basic organizational structure and names visible. The boxes are no longer overlapping, and the information is much easier to read. At the bottom of the chart, it says 'C:\OP9 Active Samples\OP9\Communications.odxb' and 'Shown head count: 16 Open positions: 1 Planned: 17 1'.

After - Customize Button:

Click Customize and then select which fields should be printed. In this example, Bldg and Office No. are selected for display.

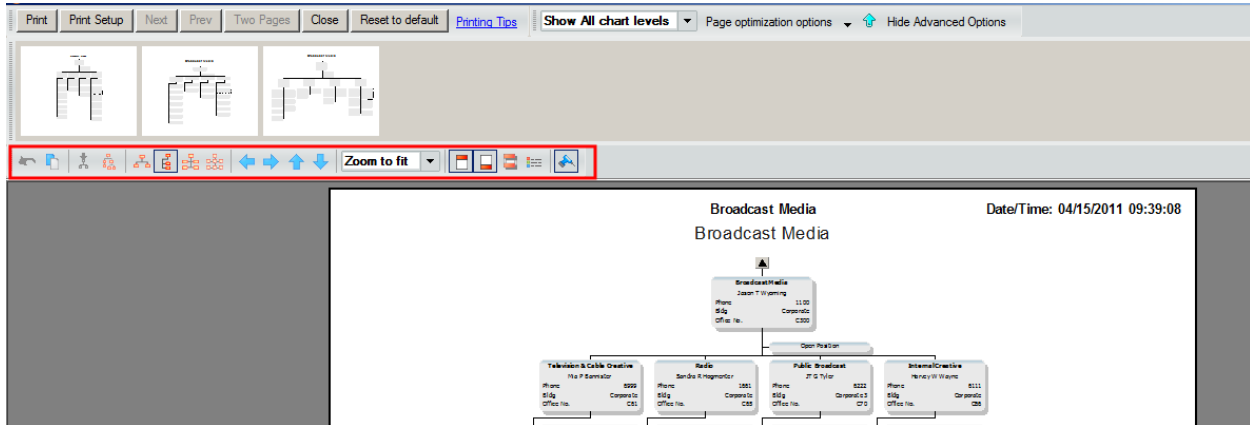


### 4.3 Show Additional Options




The Additional Options feature provides additional controls for manipulating the output page. Click Show Advanced Options to display the control buttons.



#### Additional Option Buttons



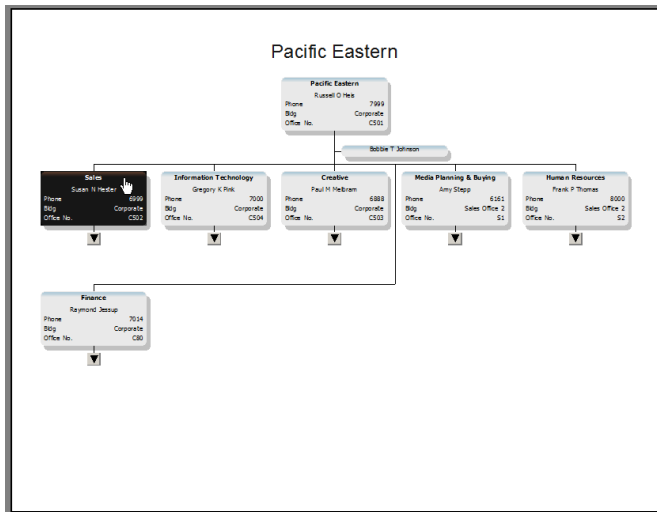
	<b>Undo</b> – Available if the arrow buttons or drag and drop were used to move the chart, departments or boxes. Click to undo the last move.
	<b>Copy</b> – Available if the arrow buttons or drag and drop was used to move the chart, departments or boxes. Click this button to make a copy of the page. The page can be pasted into any document.
	<b>Set Top of Chart</b> – Used to change the top box displayed on the page.
	<b>Display Whole Chart</b> – If the top box displayed on the page is not the actual top box, click this button to see the actual top box.
	<b>Layout 1, 2, 3 &amp; 4</b> – Changes the display of the lowest level boxes in each organization.
	<b>Movement Arrows</b> – When a box, department or the chart is selected, click the appropriate arrow to move the highlighted boxes on the page.
	<b>Zoom</b> – Zooms the chart to allow more boxes to display on the page.

	<p><b>Header and Footer Controls</b> – Use the header and footer buttons to set elements for display or to turn off the header, footer or both.</p>
	<p><b>Add or Remove Legend</b> – If a legend is available for the chart, this the on/off toggle for display.</p>
	<p><b>Drill-up and Drill-down</b> – This is the on/off toggle to display the drilling arrows.</p>

### 4.3.1 Set Top of Chart

Once you have opened the preview, you may determine that you want to print from a different top of chart. If you can see the top box you require on the page, then select the box and click on the Set Top of Chart button.

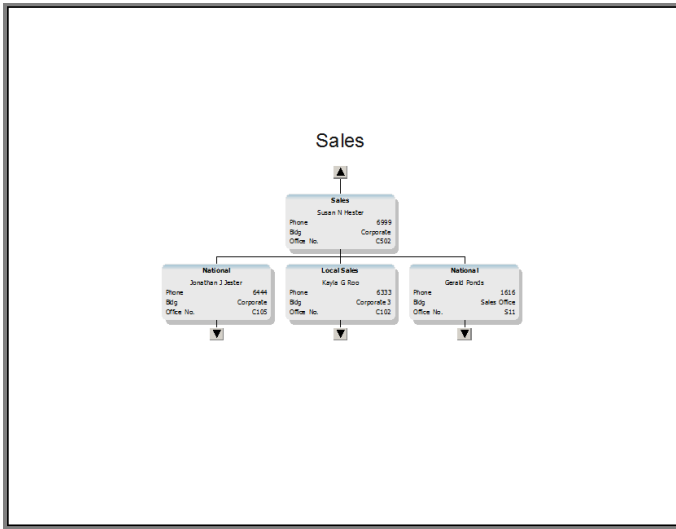
1. The Sales division is selected



2. Click Set Top of Chart



3. The Sales division is now at the top of the chart



4. Click the Display Whole Chart to return to the actual top of chart



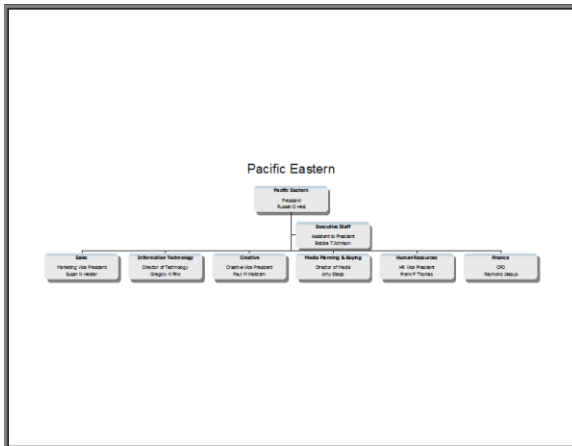
### 4.3.2 Change lowest level box configuration (Layout 1, 2, 3 and 4)

The 4 layout options determine how the lowest level boxes displayed will be arranged.

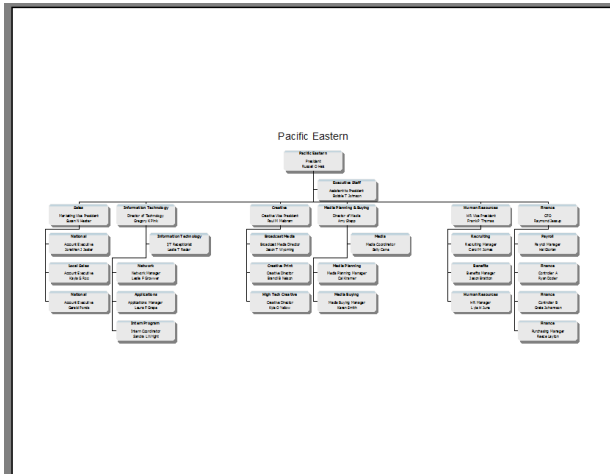
Examples of each setting are provided below.



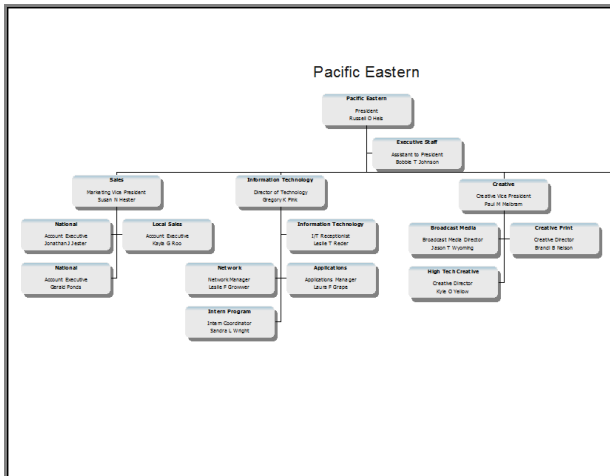
- Layout 1 – Lowest level boxes are horizontal



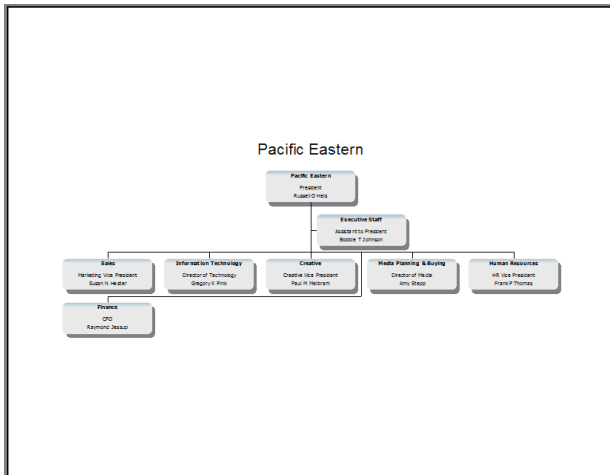
- Layout 2 – Lowest level boxes are vertical



- Layout 3 – Lowest level boxes are side by side and vertical



- Layout 4 – 2 levels display and boxes are wrapped

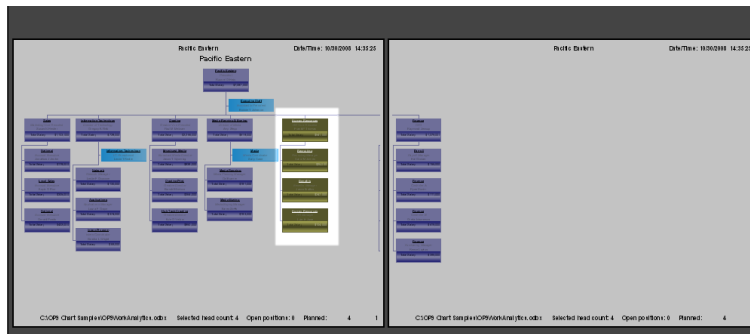
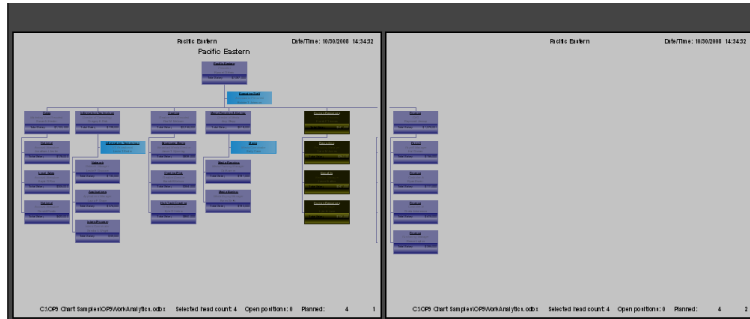


### 4.3.3 Move Boxes Using Arrows or Drag and Drop

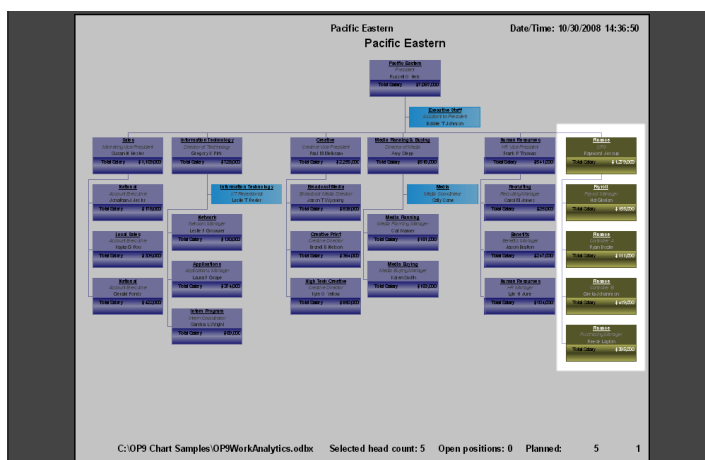
A box, department or the whole chart can be repositioned on the page by using the Movement Arrow buttons OR with drag and drop.



1. Select the box, department or chart to move
2. Click the directional arrow to move OR hold the left mouse button down on the top selected box and then drag and drop to the desired position

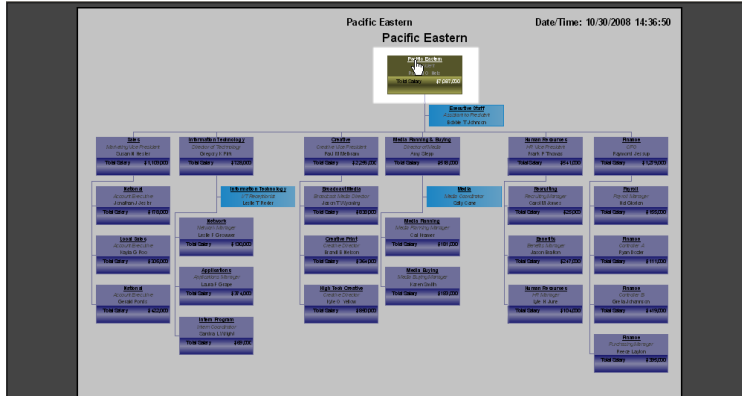


3. When all boxes are on a single page, click the One Page button to show only 1 preview page.

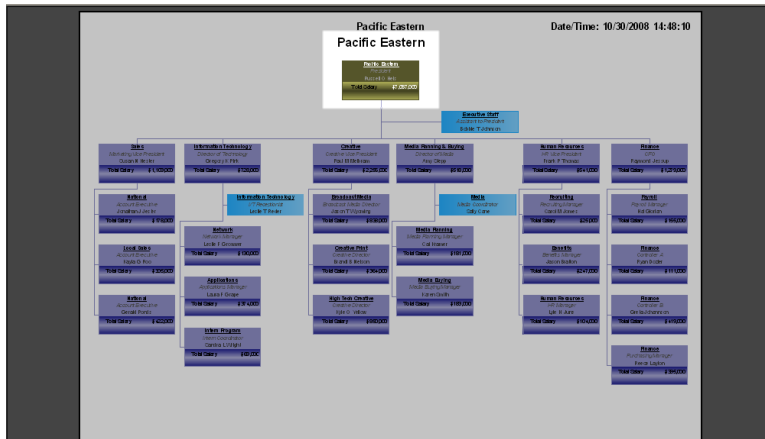


### 4.3.4 Repositioning the Top Box on the page

Click twice (not a double click) on the top box displayed. Only that box will be selected. Use the arrow buttons or hold the left mouse button down on the box and then drag and drop in the new location.



The top box and chart title are now repositioned on the page. Repeat the process to move the Assistant box below the top box.

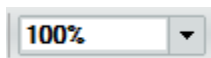


Assistant box is repositioned

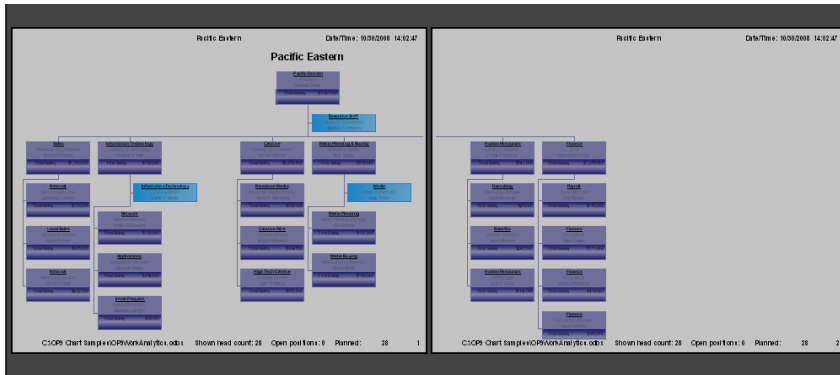


### 4.3.5 Zoom control

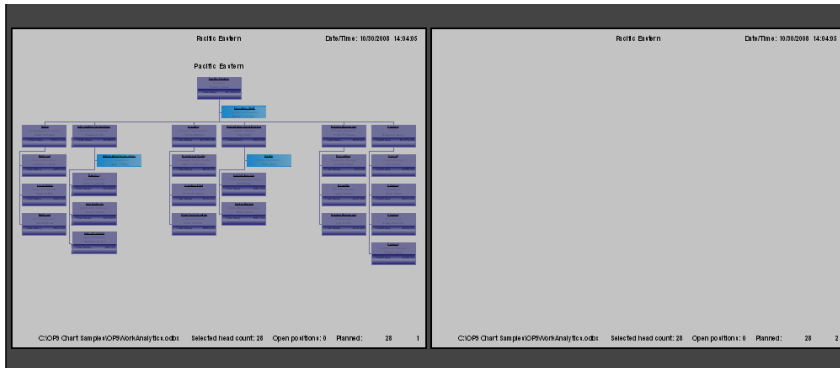
The zoom control changes the size of the chart image displayed.



Layout 2 with 3 levels displayed – Zoom is set to 100%



Same sample as above, but at 70% Zoom

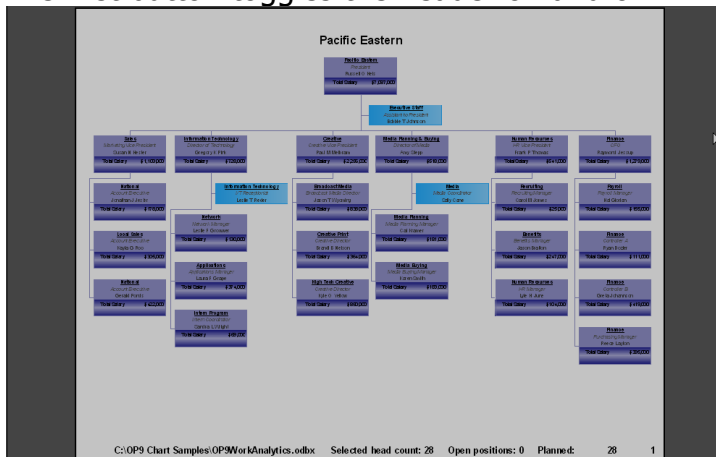


### 4.3.6 Modify the Header and Footer

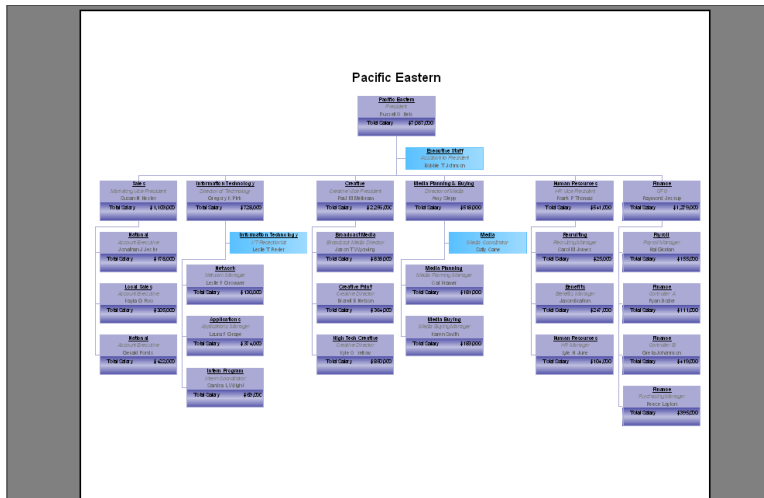
Three buttons control of the header and footer.



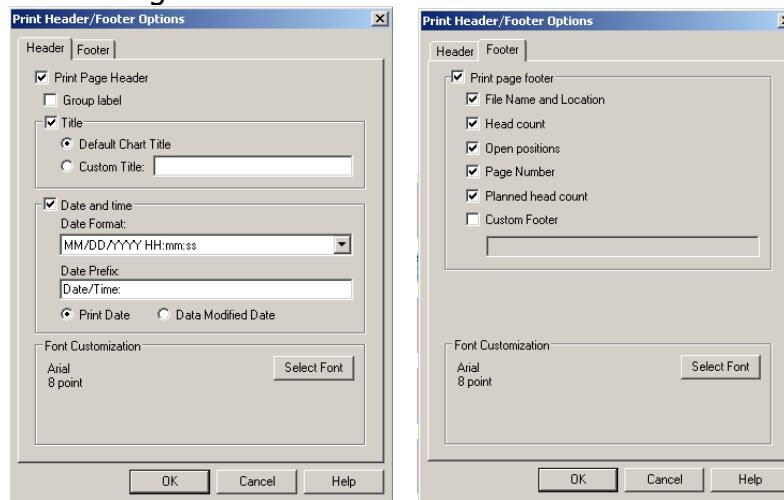
The first button toggles the header on and off.



The second button toggles the footer on and off.



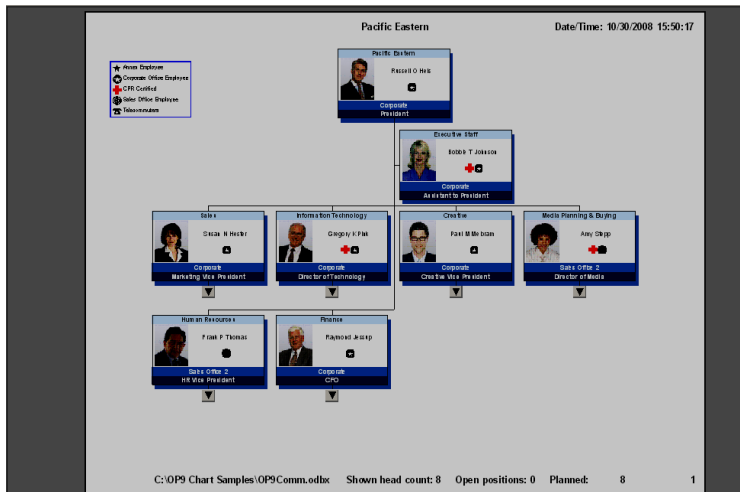
The third button controls the elements displayed in the header and footer. Make any desired changes and then click OK.



### 4.3.7 Add or Remove Legend

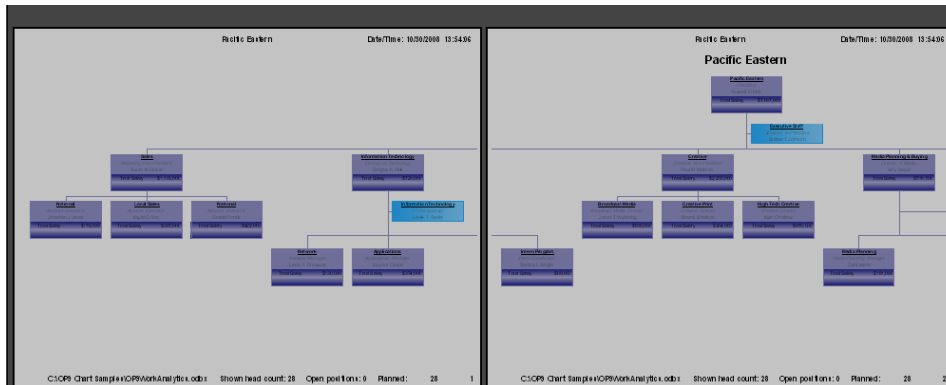
If your organization chart contains a legend, you can use the Legend toggle button to display or not display the legend in the printout.





### 4.3.8 Turn off Drilling Arrows

This is a toggle button to display or not display the drilling arrows. If the drilling buttons are on, the lowest level boxes will display horizontally. The use of Chart Layouts 2 and 3 will have no impact on the display of the chart. See next section for details on Chart Layouts.

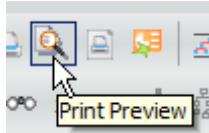


## 5 Book Style Print Preview

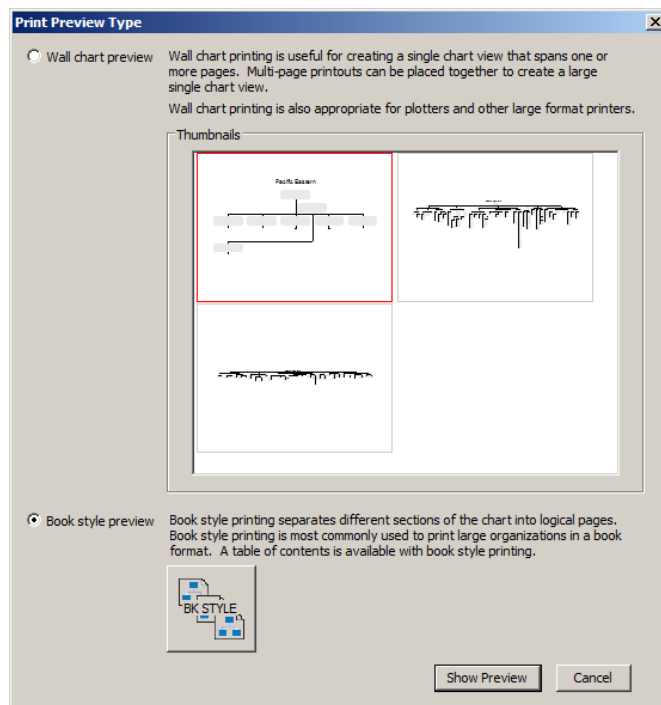
Book Style printing is best suited for printing large portions of the chart or the whole chart. OrgPublisher breaks the chart into pages. You can modify the page prior to printing using the techniques described in the Wall Chart Print Preview section of this manual.

Chart Administrators can use Print Preview to configure the whole organization chart. These settings are saved and become part of the published chart.

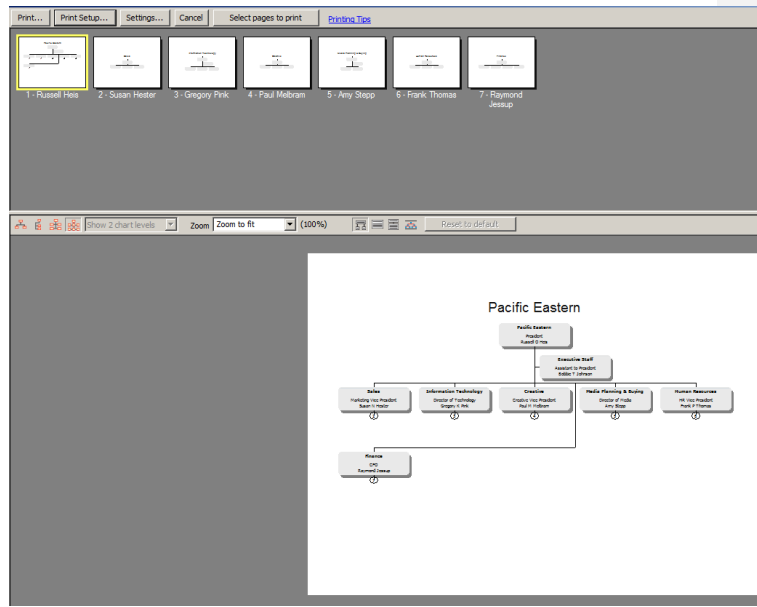
1. Select Print Preview



2. Select Book Style

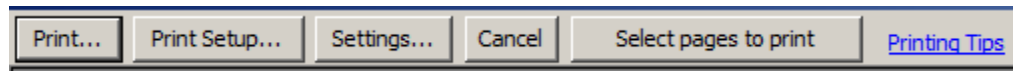


3. The Preview window displays 2 panes.
  - 3.1 The upper pane displays all pages for print.
  - 3.2 The lower pane sets the focus on the selected page in the upper pane. The user can manipulate the page layout from this pane.



4. Each Pane has options for modifying the print output.

The upper pane has the Printing and Settings options.



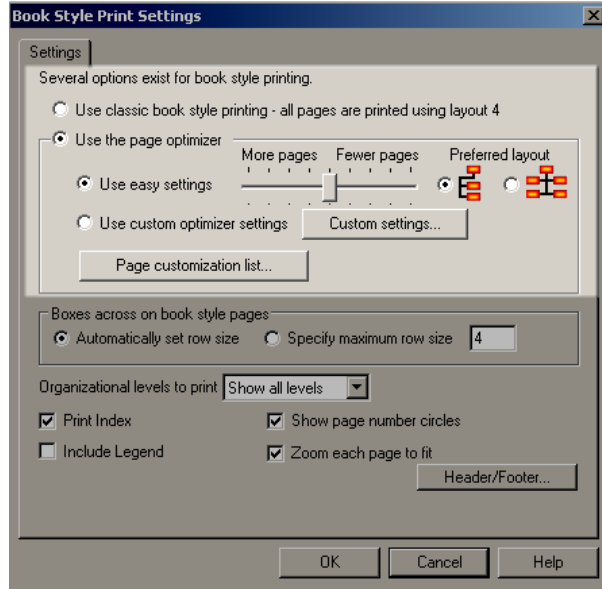
The lower pane contains page manipulation buttons (detailed in the Wall Chart Print Preview section of this manual)



## 5.1 Settings

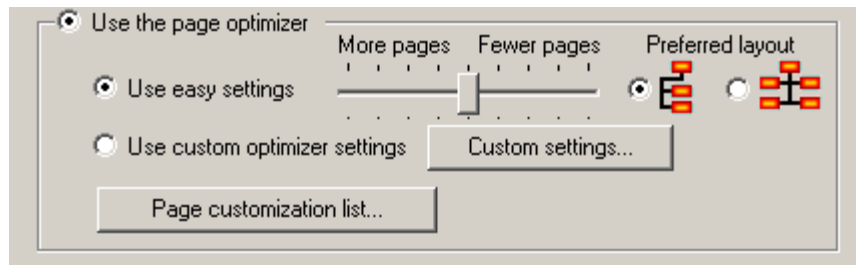
1. In the upper pane select Settings
2. The highlighted section provides you 2 options.

Option 1: Do you want to break the chart into 2 levels using Layout 4 on all pages?  
 Option 2: Do you want to apply some controls to optimize the print pages?



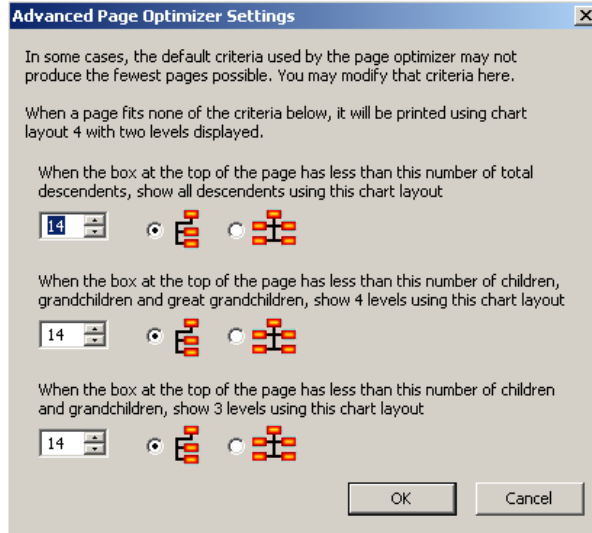
- 2.1 If you select option 2 – Use the page optimizer, you can now use the setting options available under the optimizer. These are:

**Use easy settings:** Use the slider to reduce or increase the number of pages printed. Determine your preferred layout method for the lowest level boxes printed on the page.



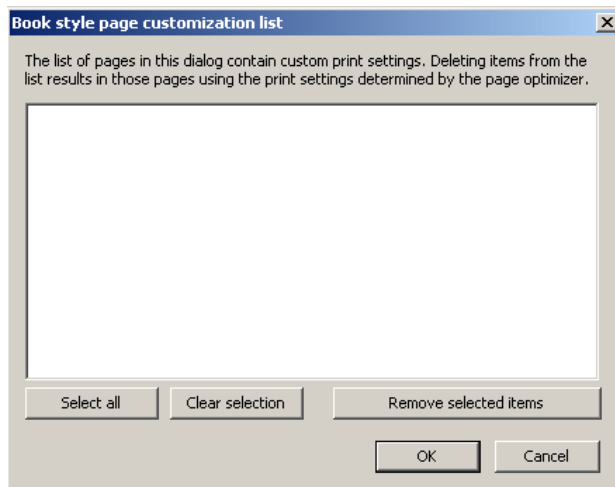
**Use custom optimizer settings:** Click the Custom settings button. The following window displays. This allows you to optimize the output even further for the fewest pages printed.

Each setting let's you control the output of each individual page based on the criteria you select. Make your changes and click on OK.



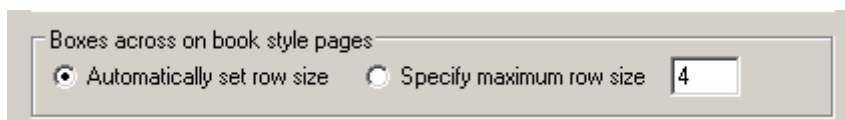
## 2.2 Page Customization List

When customizations have been made manually to a specific page (in the lower pane) and saved, the list of these pages is available for removal if no longer needed. Read further down in this manual for information on making the manual changes. This example has no customizations saved.

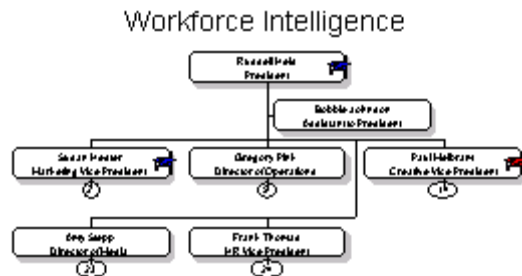


## 2.3 Boxes across on book style pages

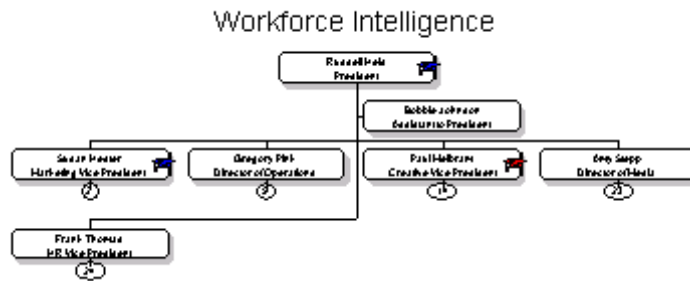
This gives you the option to control the number of boxes displayed across on pages that will have Layout 4 (wrapped and stacked boxes) applied. You can let OrgPublisher automatically set the number or indicate the number you prefer for each line of boxes.



Automatic – OrgPublisher used 3 across



Maximum specified - 4



2.4 Organizational levels to print let's you determine how many levels from the top box in the print out you wish to print. Click the drop down to select the number of levels.

Organizational levels to print

2.5 Select to zoom each page, show page number circles, print Group icon legend, print an index or modify Header/Footer contents.

1.1 Indicates option selected

<input checked="" type="checkbox"/> Print Index	<input checked="" type="checkbox"/> Show page number circles
<input type="checkbox"/> Include Legend	<input checked="" type="checkbox"/> Zoom each page to fit

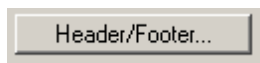
**Print Index** uses the field layout of the List View in the Style that has been selected for printing. This will appear at the first of the printout. Each record will be listed (and sorted as the List View dictates) with the page number where the box is located. Please review the Views manual for more information on the List View.

**Show page number circles** will print the page number circles (replaces the drilling arrows in a published chart). These circles tell the viewer of the printout what page contains the continuation of that organization.

**Include Legend** is a valid option if there is a legend contained in the Style selected for printing. The legend will print on each page.

**Zoom each page to fit** automatically resizes each output page to fit on a single page. The viewer will not have to make any manual adjustments. If this setting is selected, the user can go to an individual page and turn the zoom off to make adjustments.

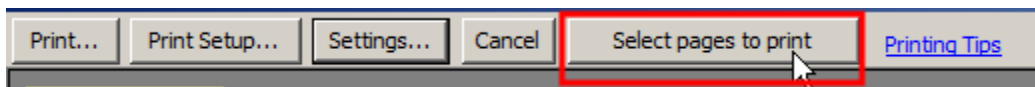
- 1.2 The Header/Footer button allows the user to modify or turn off the header and footer. Once selections are made, click OK to return to the Settings window.



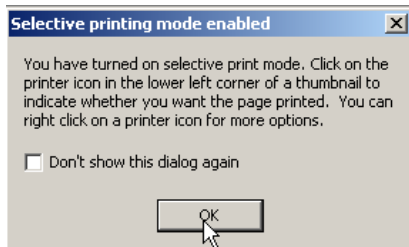
3. Once all changes are made, click OK.

## 5.2 Select Pages to Print

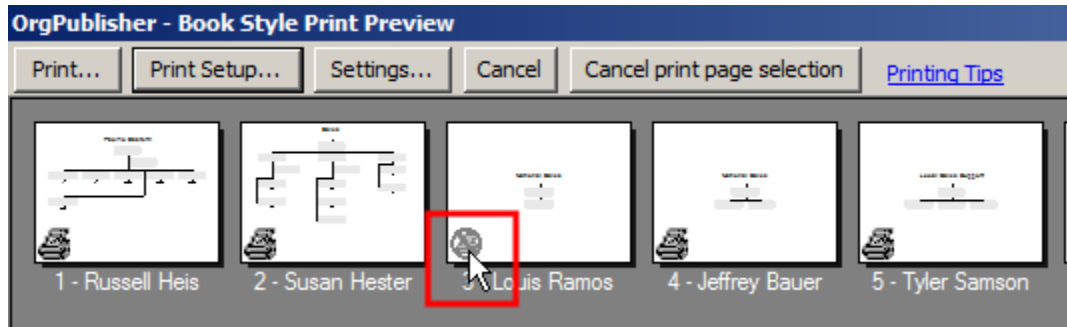
The **Select pages to print** button when clicked will select all pages for printing.



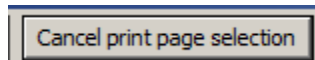
You will be prompted with this dialog box telling you that the option allows you to click to select or deselect a page for printing. Click OK to continue.



Once the button is selected, it changes to read **Cancel print page selection**. All pages are selected for printing, as noted by the printer icon in the bottom left corner of each page. To deselect the page for printing, click on the printer icon, as noted below. The icon will indicate no print and this page will not be included in the print output.



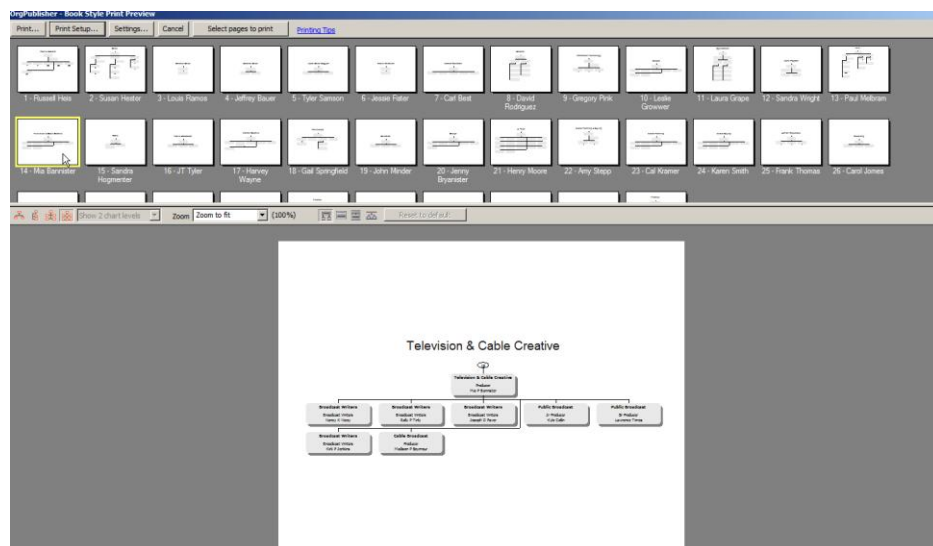
To exit from this mode, click on the Cancel print page selection button.



### 5.3 Customize a Page Manually

The lower pane of the preview window displays the selected page and provides options for modifying the look of that page.

1. Select the page to modify. The page appears in the lower pane of the Print Preview window.



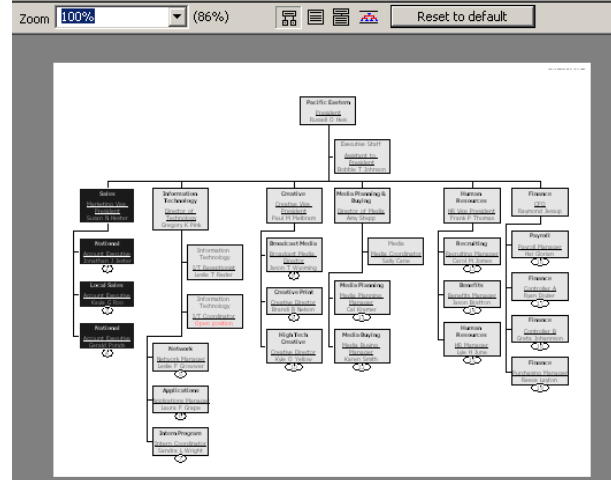
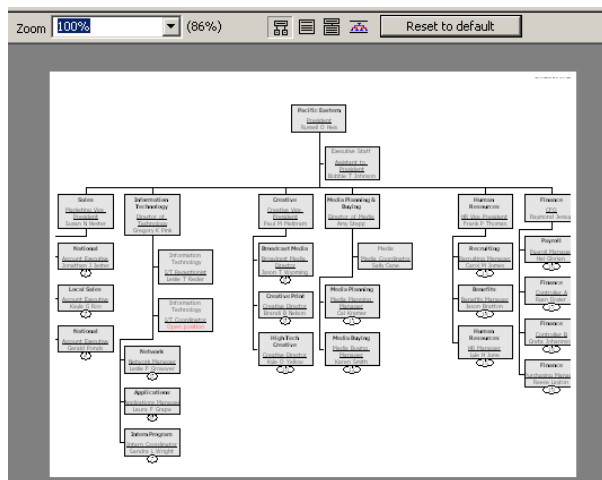
2. The toolbar buttons in the lower pane are detailed in the Wall Chart Print Preview section in this manual.

### 5.4 Zoom then Drag and Drop Boxes on an Individual Page

When manipulating the individual page work for the highest zoom percentage to ensure readability of the printout. 50% and higher typically provide good readability on the printed page.

If increasing the zoom moves some of the boxes beyond the edge of the page, consider using drag and drop to move them back onto the page. Refer to the Drag and Drop information in the Wall Chart Print Preview section of this manual.

100% Zoom – left and right edge cut off      Boxes moved to fit left and right edges



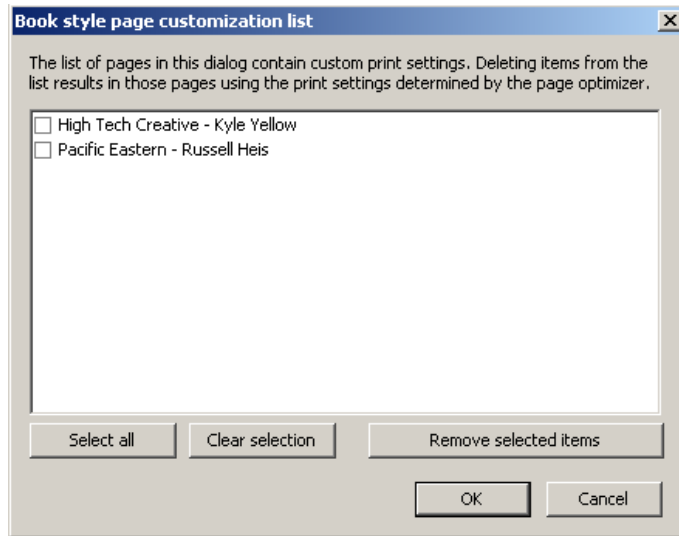
### 5.5 Working with a Page Customization List

As noted earlier in this section of the manual, the chart administrator may make customizations to a page that is carried over to the published chart. At times, these customizations may need to be removed.

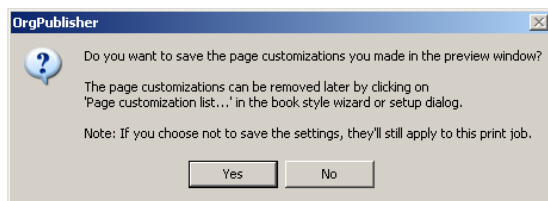
1. There is a customization for this page. The push pin indicates this.



2. To remove this customization, click on Settings, then Page Customizations List. Click to select the page you wish to remove. Click Remove selected items and then click OK.




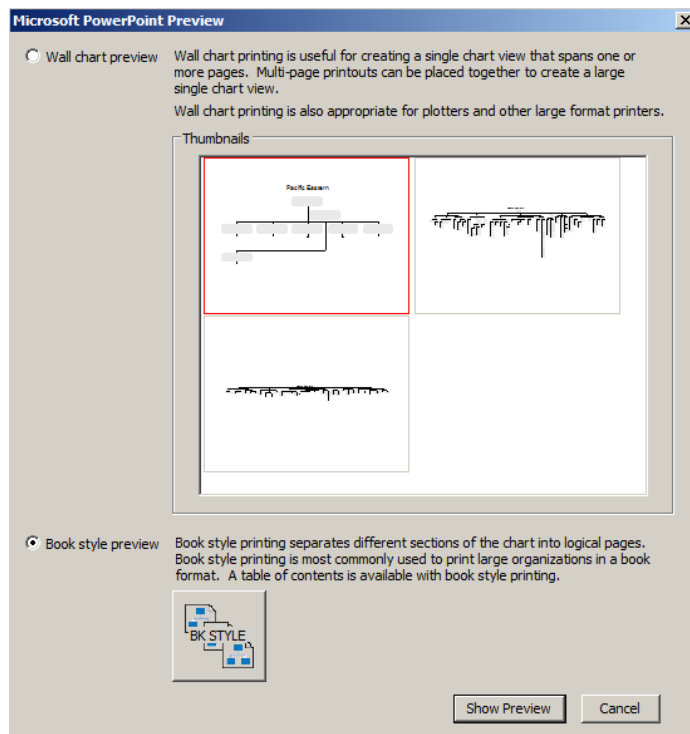
If customizations were made to any pages while working in Print Preview, if you click on the Print button, you will be prompted to save your customizations.



## 6 Send to PowerPoint - Book Style and Wall Chart

OrgPublisher sends output to PowerPoint using the same methods available for Wall Chart and Book Style printing. Send to PowerPoint launches the same previewer windows as noted for each style of printing earlier in this manual. Within each of these windows, the button Print is substituted for Send. Because this is PowerPoint output, there are some different options available from the Send button. This feature is available to Chart Administrators, Users viewing charts published as PluginX or EChart Rich Client and OrgPlan users.

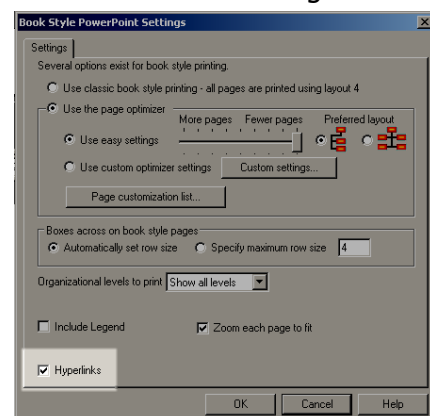
1. Select the Send to PowerPoint button 
2. Select Book style or Wall chart preview



### 6.1 Settings Option When Sending to PowerPoint

The Settings window contains most of the options offered when printing. You will note a couple of options missing from the PowerPoint Settings window, such as Print Index and Page number circles.

There is a new option in this window that allows you to activate Hyperlinks on the chart slides in the PowerPoint presentation. Click to select Hyperlinks if this function is desired in the resulting PowerPoint chart slides.



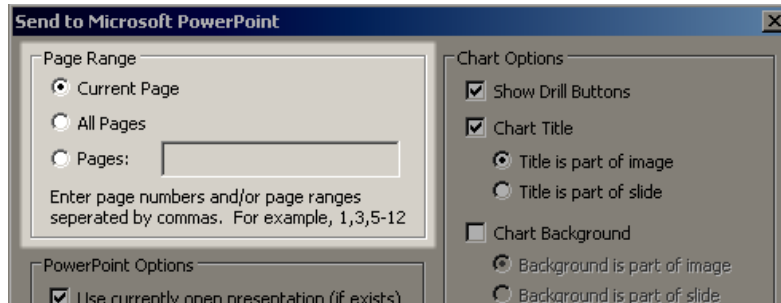
## 6.2 Modifying Chart Slides

Chart pages in Book Style preview represent the chart that will be placed on individual slides in your PowerPoint presentation. Modification of the slide is similar to the method used to modify charts in Wall Chart Preview. Please refer to the section on Configure the Printed Page in the Wall Chart Print Preview section of this manual for specific details on the common functionality.

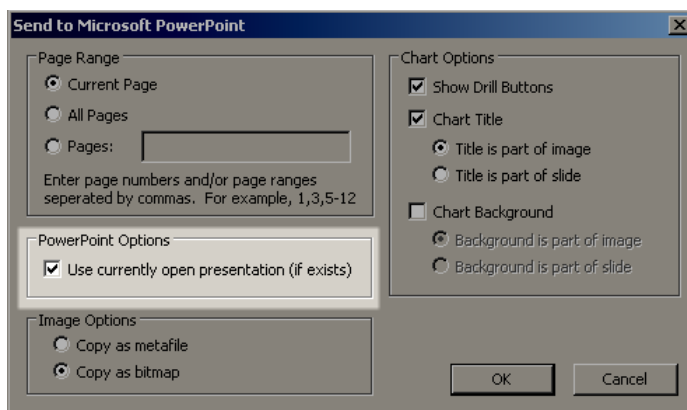
## 6.3 Sending to PowerPoint Options

There are several options a user can make when sending output to PowerPoint. Details about the options are provided below.

1. Modify the page layouts as you would for printing.
2. Click the Send button to set options prior to sending to PowerPoint.
3. Make the following selections and then click on OK to send to PowerPoint.
  - 3.1 In the highlighted area below if you have used the Select pages to print button, OrgPublisher will populate the Pages entry. If not, you can type in the pages you wish to print or just select Current Page or All Pages.

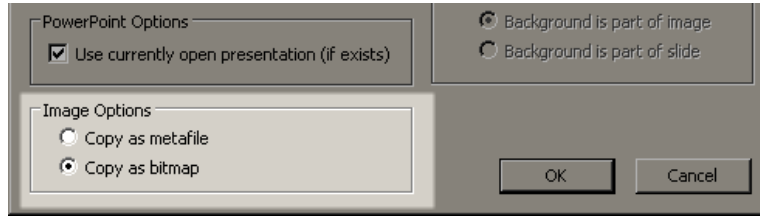


- 3.2 The highlighted option below let's you choose to place the chart slides in an open PowerPoint or if not checked, to open a new slide presentation containing the chart slides.

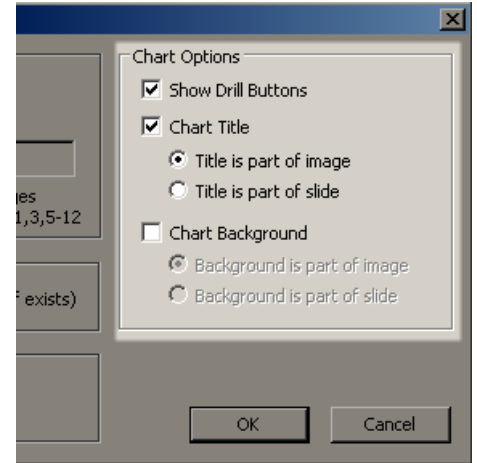


- 3.3 The highlighted portion below let's you select what type of graphic image is placed on each slide of the PowerPoint. Both send the slides over as a single image. If the metafile option is selected, the image can be ungrouped in PowerPoint and lines and boxes can be manipulated. This is very tedious and not recommended

for novice PowerPoint users.



- 3.4 The highlighted portion below allows you to select any or all of the options. If **Show Drill Buttons** is selected and **Hyperlinks** is check marked in the Settings Window, the drilling arrows will be active in the PowerPoint. A user can click on the arrows in the PowerPoint and navigate to the correct slide containing the remainder of the organization.



The **Chart Title** can become part of the graphic image on the PowerPoint slide or it can be separate from the image. If the title is part of the slide, it will appear in a text box at the top of the slide. It can be edited, as needed by the user.

The **Chart Background** can be sent over to the slide if **Print Gradient/Background** is activated by the chart administrator. The user can select to include the chart background as part of the slide or as part of the chart image. If it is part of the chart, it can be sized to cover the whole slide. If it is part of the image, the chart image and background are one and also can be sized as needed.

**Please note:** The chart administrator, must indicate that backgrounds can be printed. This is done in the Format menu, select Chart and then click to select.

- 3.5 Click OK to complete.

Property	Value
Background color	[Color Selection]
Gradient Color	[Color Selection]
Gradient Style	(None)
Background Image	Embed Image Remove Image
Background Style	Center
Print Gradient/Background	<input type="checkbox"/>