

OrgPublisher Publishing



OrgPublisher 10 Training

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Table of Contents

1	Organization Chart Publishing	1
1.1	Publishing Output	1
1.2	Publishing Wizard	2
2	Express Mode Publishing	3
2.1	Publishing Options in Express Mode.....	3
2.2	Published Samples	3
3	Advanced Mode Publishing – Interactive Charts	5
3.1	Publish Location.....	6
3.2	PluginX Password Protection	6
3.3	EChart Output Options	6
3.4	EChart Server Location and Maximum Levels.....	6
3.5	EChart Security	7
3.6	Default Style and Reset Starting Box	7
3.7	Publishing Error Notification	8
3.8	Published Chart Color Scheme Palette.....	8
3.9	Color Schemes to Blend with Intranet Palette.....	8
3.10	Toolbar Options.....	9
3.10.1	Toolbars and Buttons Defined.....	9
3.10.2	EChart Toolbar Security	12
3.11	Enable Organizational Planning or Succession Planning	13
3.11.1	Planning Chart Settings.....	13
3.11.2	Set Default Options for Change Report.....	14
3.11.3	Planning Chart Storage	15
3.12	Limiting Access with EChart Rich Client.....	16
3.13	Define Context Menus	16
3.14	Exclude Positions Above	17
3.15	Directory View	17
3.16	Remember User’s Navigation and Interface.....	17
3.17	Hotspots	18

3.18	Custom Help File.....	18
3.19	Email and Visually Impaired Options.....	19
3.20	Archive Scheduling.....	19
3.21	Publishing	19
4	Advanced Mode Publishing – Documents	20
4.1	Publishing Wizard	20
4.2	Publish Location.....	21
4.3	Default Style and Reset Starting Box	21
4.4	Publishing Error Notification.....	21
4.5	PDF Page Layout	22
4.6	PDF Page Size and Orientation.....	24
4.7	PDF Font Embedding, Resolution and Image Options.....	24
4.8	HTML Drilling.....	24
4.9	Publishing	24
5	Publishing Multiple Charts from a Single Formatted Chart.....	25
6	Publish Charts Window	26
6.1	Modify an Existing Publishing Definition	26
6.2	Create a New Publishing Definition	26
7	Screen Capturing from PluginX Disabled	27
8	Scheduled Publishing	28
8.1	Schedule When Creating a Publishing Definition	28
8.2	View, Edit or Create Publishing Schedules	29
8.3	EChart Scheduling.....	30
8.4	Testing a Publishing Schedule	31

1 Organization Chart Publishing

OrgPublisher Publishing is the method for distributing charts to your organization. There are many options available to meet the needs of your end users. The training document assumes you and your organization have reviewed the Architectural Overview (available on the Aquire Website Support Portal) to determine the type of output required for your organization. In this manual, details on how to create and manage publishing definitions are provided.

Technical documents detailing setup requirements for the publishing options are available on the Aquire Website's Support Portal.

1.1 Publishing Output

OrgPublisher provides interactive and document output options. A subset of features is listed below. Please review the Architectural Overview for a more detailed listing.

Interactive Charts:

- Print and print preview manipulation of output
- Chain of Command
- Layout Options
- Export to PowerPoint, Excel and other Windows based applications
- Search and Group for reporting
- Chart filtering and Spotighting
- Multiple styles and View displays
- Multiple Navigation options
- Send to PDF (EChart Rich Client)
- Organization Planning
- Succession Planning

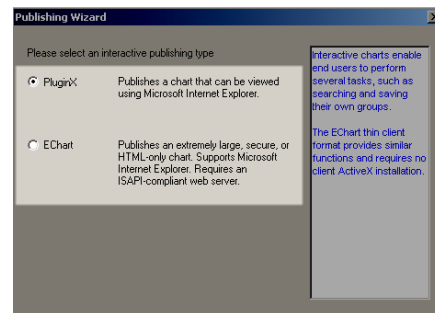
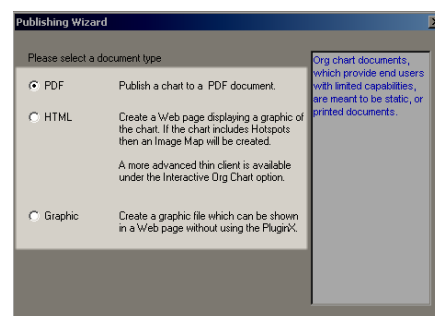


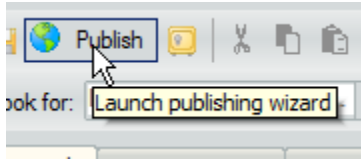
Chart Documents:

- Limited Print capabilities
- Limited Navigation
- Does not require an ActiveX component

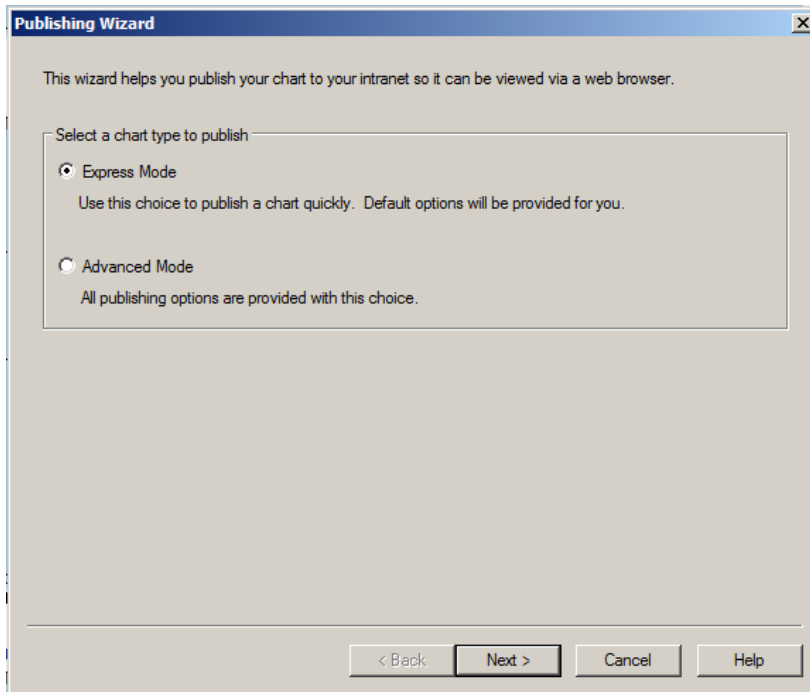


1.2 Publishing Wizard

A publishing wizard is launched the first time you click the Publishing button.

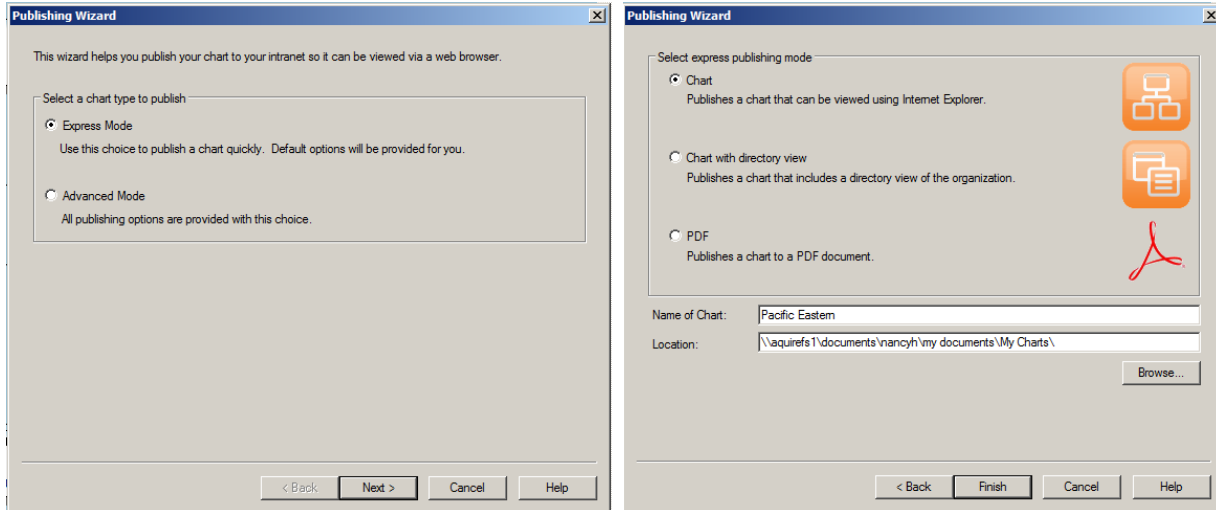


The Publishing Wizard displays different dialog boxes based on the type of output you select. There are 2 options offered for publishing – Express Mode and Advanced Mode.



2 Express Mode Publishing

Express mode publishing quickly produces a published chart by using default options for a PluginX, PluginX with a Directory View or a PDF. The user has a single screen to make selections and the chart is published.



2.1 Publishing Options in Express Mode

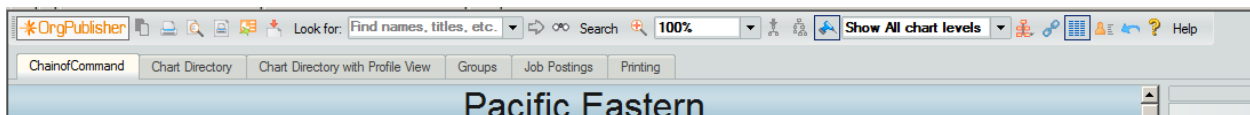
The selection screen in Express Mode offers 3 types of publishing output: PluginX; PluginX with a Directory View; and PDF. The user also names the publishing definition and indicates where the chart should be published. Initially, you may publish locally to view and test the output. If you are publishing in a permanent location, you may need to obtain the location information from your IT Group or Web Administrator.

Please note:

1. If you have more than one Style in your organization chart, select the Style you wish to have active when the chart is opened before clicking the Publish button.
2. If you are publishing as PDF, the active Style is used to produce the file. Preview this file in Book Style Print Preview to layout the pages as you want them to appear in the PDF file.

2.2 Published Samples

PluginX Express Publishing provides the toolbar functionality below.

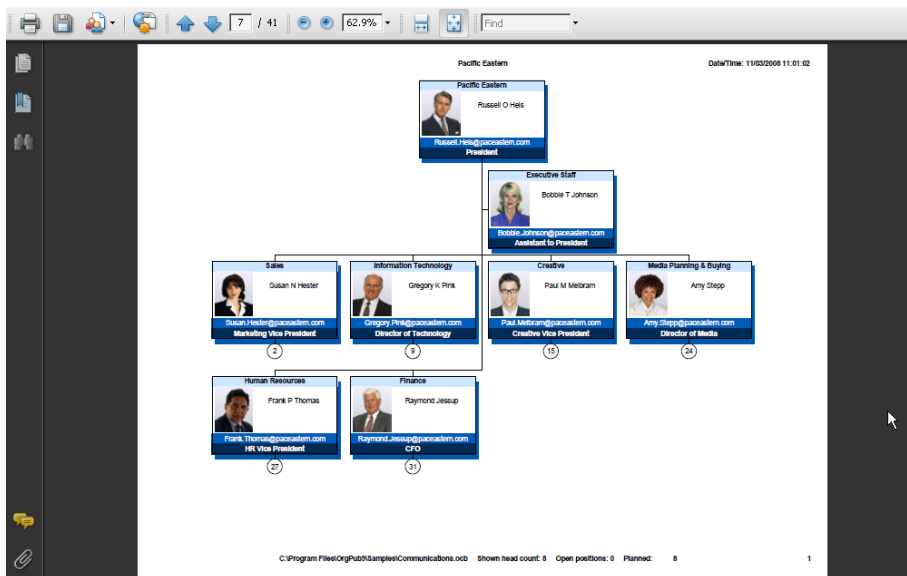


PluginX with a Directory View Express Publishing provides a chart with the functionality noted above. It also provides a separate Directory View output. Please refer to the Directory View –

A Publishing Option section of this manual for details on how to lay out this View.

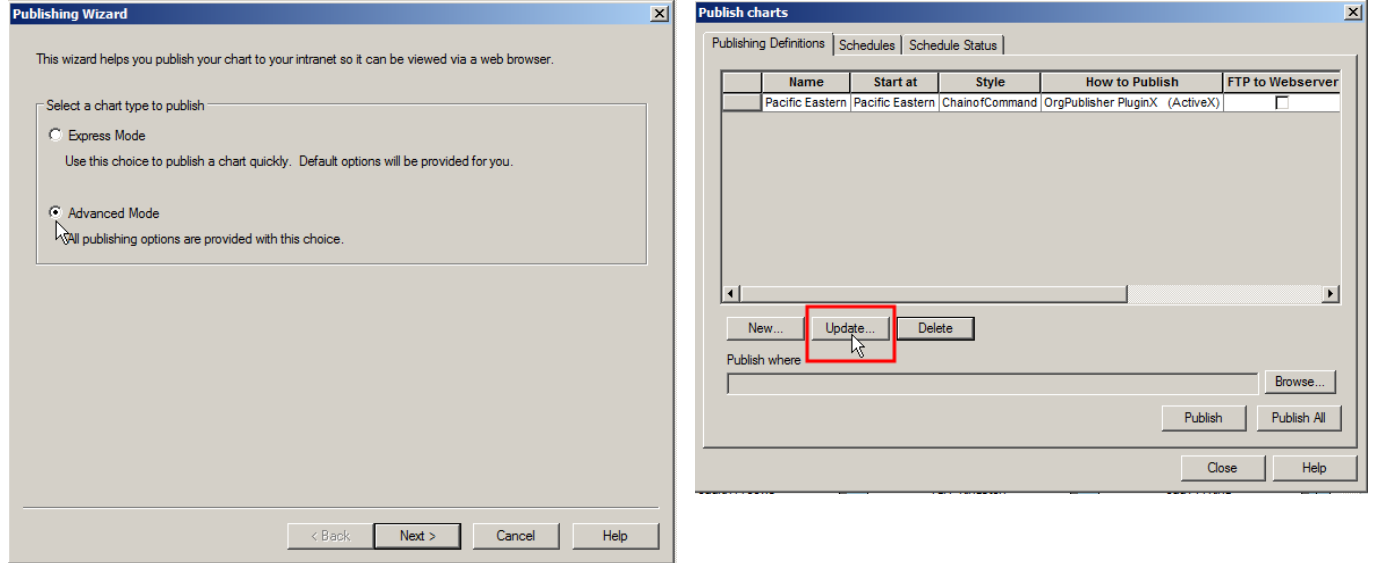
Name:	Last	First	= Any Part of Field	New search	Go	State	Bldg	Office No.	Time Zone
Emily Abbott	Media Coordinator	Media	7018	Emily.Abbott@pacificeastern.com	CA				
Lisa Abbott	Purchasing Agent 1	Finance	6028	Lisa.Abbott@pacificeastern.com	MA	Annex 2	A30	EST	
Cheryl Adelsper...	Benefits Specialist	Benefits			CA				
Abigail B Alexan...	Web Programmer	Web	7017	Abigail.Alexander@pacificeastern.com	MA				
Gail P Amster	Product Specialist	National	2277	Gail.Amster@pacificeastern.com	CA	Sales Office	S18	CST	
Caroline Anderson	Accts Rec/Cash Mgr	Finance	7010	Caroline.Anderson@pacificeastern.com	CA	Corporate	C82	PST	
Olivia K Bailey	Programmer	Business Applicati...	6014	Olivia.Bailey@pacificeastern.com	MA				
Henry K Banner	Writer	Collateral	8833	Henry.Banner@pacificeastern.com	CA	Corporate	C78	PST	
Mia P Bannister	Producer	Television & Cable...	6999	Mia.Bannister@pacificeastern.com	CA	Corporate	C61	PST	
Elizabeth Bartlett	Capital Purchases	Finance	6020	Elizabeth.Bartlett@pacificeastern.com	MA	Annex 2	A35	EST	
James Bates	Broadcast Media Planner	Broadcast	6633	James.Bates@pacificeastern.com	CA	Corporate	C301	PST	
Jeffrey A Bauer	Travel Specialist	National Sales	5388	Jeffrey.Bauer@pacificeastern.com	CA	Corporate	C100	PST	
Justin Baxter	Purchasing Agent 2	Finance	6029	Justin.Baxter@pacificeastern.com	MA	Annex 2	A29	EST	
Andrew H Ball	Web Programmer	Web	6011	Andrew.Ball@pacificeastern.com	CA				

PDF Express Publishing produces a PDF file. Please read the PDF Publishing section of this manual for details on setting up the PDF output prior to publishing.

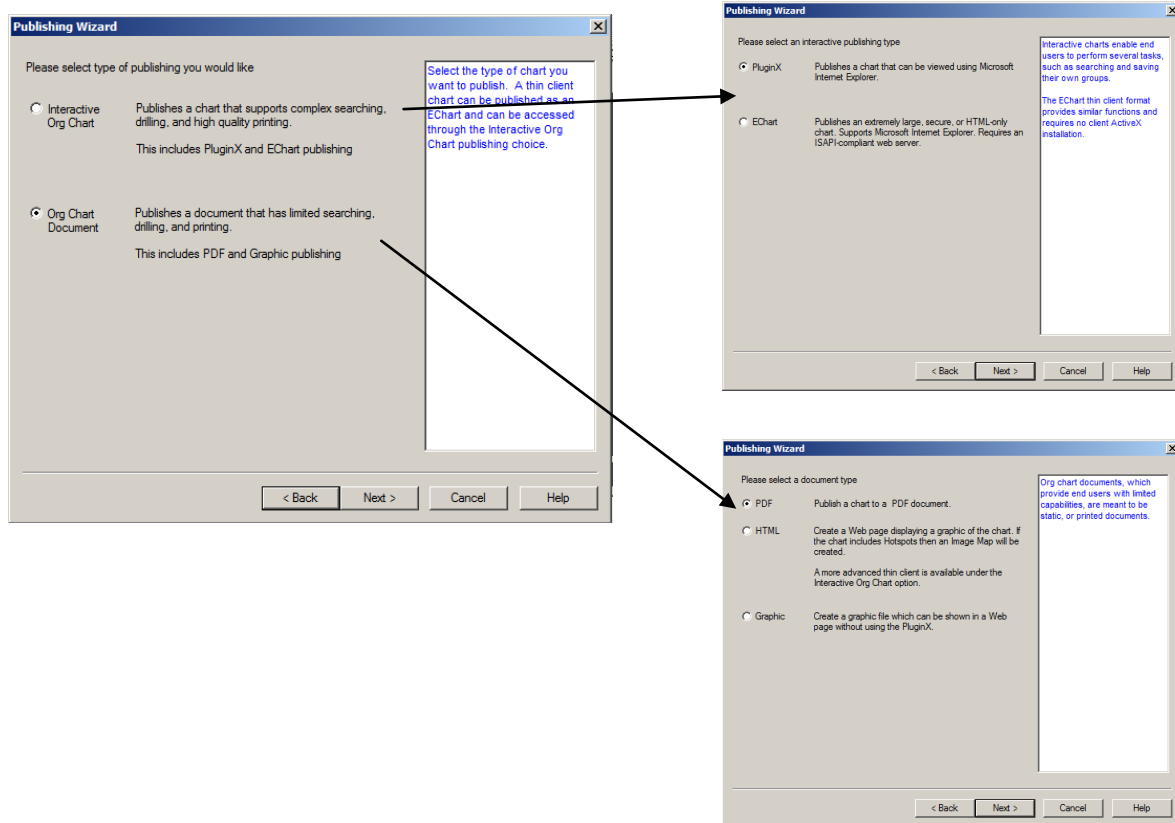


3 Advanced Mode Publishing – Interactive Charts

Advanced Mode publishing offers more control to the chart administrator. It is available when you publish the first time. It is always the option that is used if you choose to update any existing publishing definition within the Publish Charts window.



When Advanced Mode publishing is selected at publishing time, the Wizard offers the option to select an interactive or document output. Please review the Publishing Output section of this manual to see the available options for each type of output.

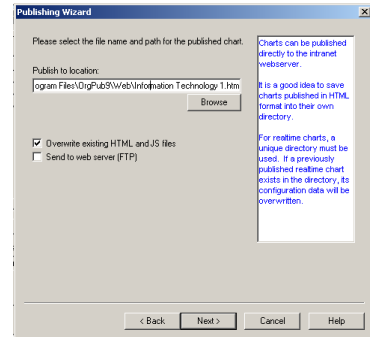


The Publishing Wizard windows will vary based on the type of output selected. The next sections of the manual go over each of the option windows.

Please note: Options that are grayed out in the Publishing Wizard window are not available for the type of output you requested.

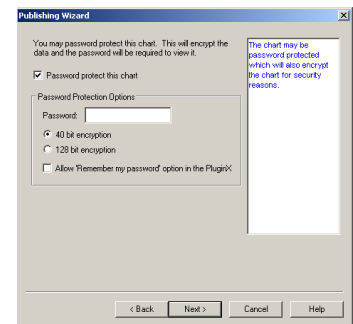
3.1 Publish Location

- Identify where the chart is to be published.
- Overwrite existing HTML and JS files should be selected if you or your web administrator do not customize the HTML produced. Please review technical documentation using an Alternate CAB File location.
- Identify if the chart will be sent to an FTP site.
- Select next.



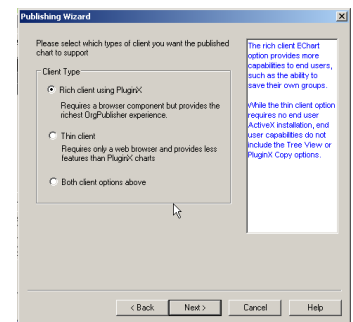
3.2 PluginX Password Protection

- Choose an encryption level
- Allow the user the capability to "Remember my password"



3.3 EChart Output Options

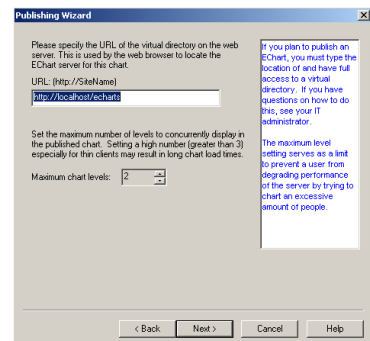
If EChart is the publishing option additional selection windows appear next in the Wizard. The first screen prompts for Rich Client, Thin Client or both types of charts as publishing output. To read more about these options, please refer to the EChart technical manuals available on the Aquire website - <http://www.aquire.com/support/top5/>.



3.4 EChart Server Location and Maximum Levels

The publishing definition for an EChart must identify the location of the EChart server. This should be obtained from the IT implementation group in your organization.

The second option on this window lets the chart administrator set the maximum levels the EChart will send to the viewer's browser. Lower numbers are the best option with large organization charts especially if published as EChart Thin Client.

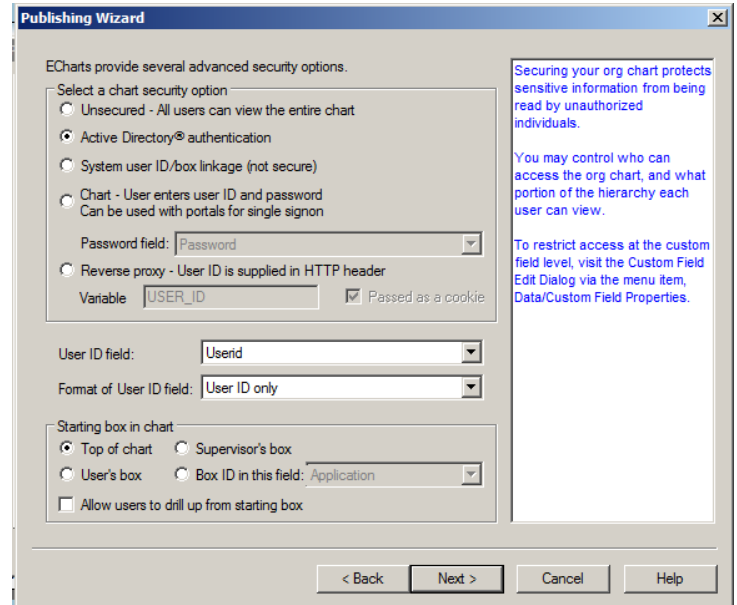


3.5 EChart Security

OrgPublisher provides several methods for authenticating a user. This is an option offered in the publishing wizard when EChart publishing is selected.

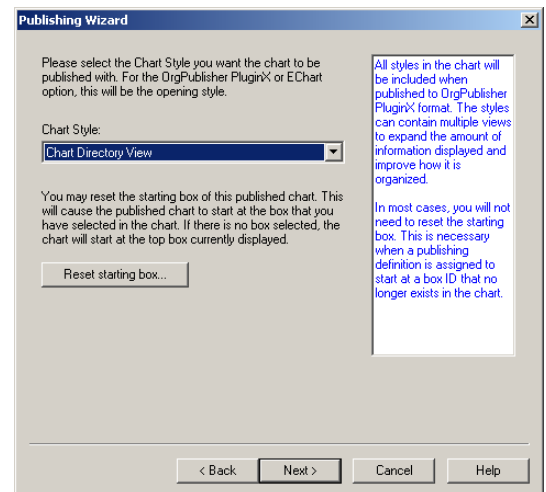
Select a chart security option

- Unsecured - No authentication
- Active Directory authentication
 - The EChart server automatically recognizes you by your network login and password.
- System User ID/box Linkage
 - The server recognizes you by your local user account information
- Chart authentication
 - The server prompts each user to enter a user ID and password.
 - Identify the field in the chart that contains the password
 - Identify the field in the chart that contains the userid
 - Identify the format of the userid
- Starting box in Chart
 - Provides control for where the user will open the chart
 - Box ID in this field option requires that a Custom Field identifying the opening Box ID for each viewer of the chart must exist in the chart. Click the drop down to identify the Custom Field containing the identifier.
- Allow users to drill up from starting box
 - Leave unchecked to prevent users from drilling to other areas of the chart



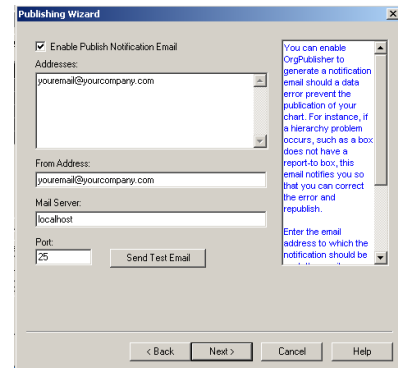
3.6 Default Style and Reset Starting Box

- Identify the opening style. This is necessary if there is more than one style in the chart.
- Identify if the top box displayed should be reset. Click the reset button if a box was selected when you clicked the publishing button. This will prompt you to confirm you want the selected box to be the opening top of chart.
- Select next.



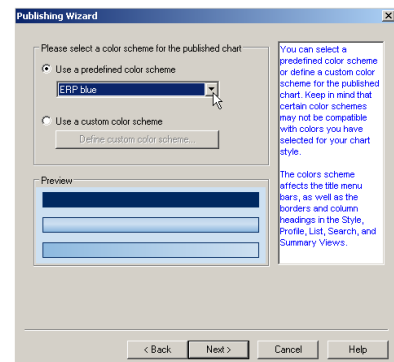
3.7 Publishing Error Notification

- Identify who should be notified if there are data errors at publishing time.
- Select next



3.8 Published Chart Color Scheme Palette

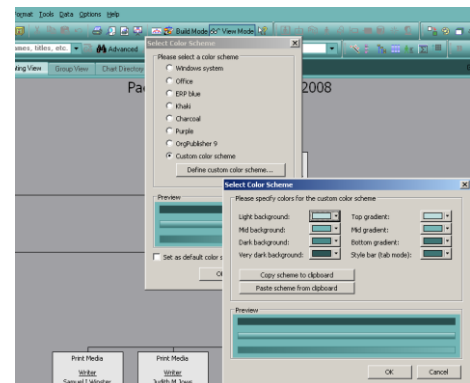
- Identify the color scheme that works best with your intranet theme OR create your own. (See next section.)
- Select next



3.9 Color Schemes to Blend with Intranet Palette

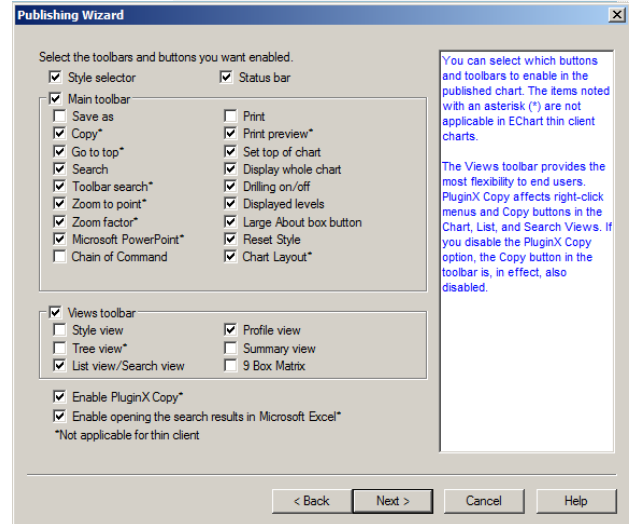
Color schemes can be selected at publishing time and also be set within the product.

- Select Options, then Color scheme options
- Select a color scheme to use that blends with your intranet color palette
- You can use palettes shipped with OrgPublisher or create your own
- Select Copy scheme to clipboard to use the scheme in another chart or to use for the published output.
- To use the copied scheme in another chart or in the publishing wizard, click Paste scheme from clipboard



3.10 Toolbar Options


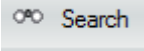
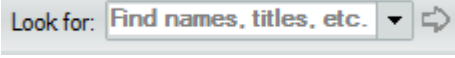

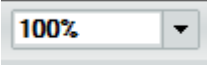







- Select the toolbar buttons you want available in the published chart.
- Secured ECharts offer the option to restrict the use of buttons to a specific group. Please see the section on Toolbar Button Security later in this manual for more details.
- Items marked with an * are not available in EChart Thin Client.
- Select Next.

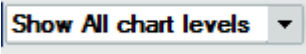




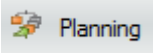








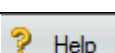
3.10.1 Toolbars and Buttons Defined

Toolbars	Name	Definition
	Style Selector	Provides the user the option to switch to a different style.
	Status Bar	Displays the number of levels that are currently displayed and head count within those displayed levels. If a person or box is selected, identifies the Position Type of the person in the box.
	Toolbar	Displays buttons selected for use in the published chart.


Main Toolbar Buttons	Name	Definition
	Save as	If the viewer has OrgPublisher installed on their desktop, they can save a copy of the chart to their desktop and launch OrgPublisher.
	Copy*	The viewer can make a copy of the displayed chart and paste it into any Windows based application.

Main Toolbar Buttons	Name	Definition
	Go to top*	If the viewer has scrolled the chart and no longer can see the top box, this button repositions the top box at the top center portion of the window.
	Search	The Search dialog box opens.
	Toolbar search*	The viewer can type in one or more words in this toolbar button to search the chart. Search items are stored and can be reused by the viewer. The viewer can also clear the stored items.
	Zoom to point*	The viewer clicks on the zoom to point button and then clicks in the desired area of the chart to enlarge and set the focus.
	Zoom factor*	The viewer can click the drop down to change the zoom percentage.
	PowerPoint*	The viewer is taken to a preview window and then is offered options prior to sending the output to a PowerPoint presentation.
	Print	Sends output to the printer.
	Print preview*	Opens a Print Preview window where the viewer can manipulate the display on the page prior to printing.
	Print Setup	
	Set top of chart	The viewer selects a box in the chart and then clicks on this button to place the selected box in the top position in the chart viewing area.
	Display whole chart	After setting a box as the top of chart, selecting this button resets the focus to the top box within the chart.
	Drilling on/off	Toggles the drilling buttons on

Main Toolbar Buttons	Name	Definition
		and off.
	Displayed levels	Changes the number of displayed levels in the chart.
	Large About box button	Identifies what version of OrgPublisher PluginX is in use on the chart viewers machine.
	Reset Style	Toggle to reset the lowest level boxes to display as published.
	Chart Layout*	Allows the viewer to change the configuration of the lowest level boxes.
	Chain of Command	
	Planning*	Only displays if the chart administrator enables Organization Chart planning or Succession Planning.

Views Toolbar Buttons	Name	Definition
	Style view	Display a list of available styles in a view window.
	Tree view*	Display structure in an outline format.
	List view/Search view	Displays a information in columns and rows for each record currently displayed in the chart.
	Profile view	Display information about the selected person, job title or box title.
	Summary view	Displays columns and rows containing head counts for Position Types and Groups.
	9 Box Matrix	Displays 9 Box View as configured by the chart administrator. The chart administrator must have formatted the 9 Box Matrix for this button to be active.
	Help	

Additional Options/Buttons	Name	Definition
No button	Enable PluginX copy*	Must be selected to activate

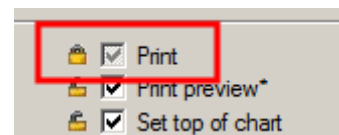
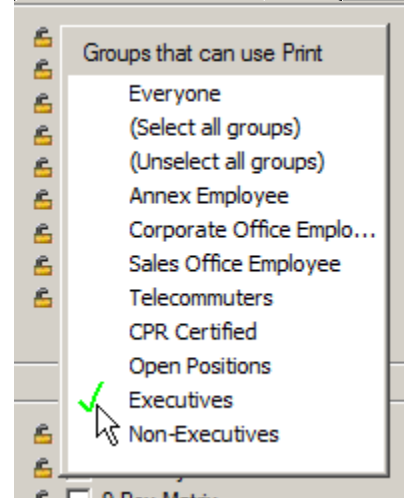
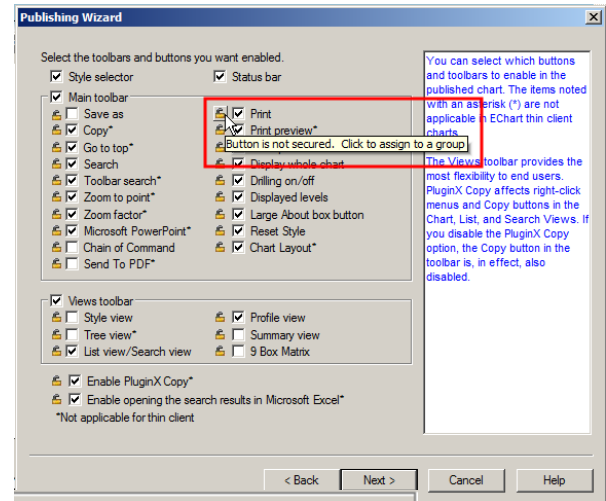
		the copying of information to another Windows based application.
	Enable opening the search results in Microsoft Excel*	Activates this button in the Search Results windows.

- Indicates the button is not available in charts published as EChart Thin Client

3.10.2 EChart Toolbar Security

Toolbar buttons are securable with charts published as EChart Rich Client. Groups are used to identify who will have access to a button.

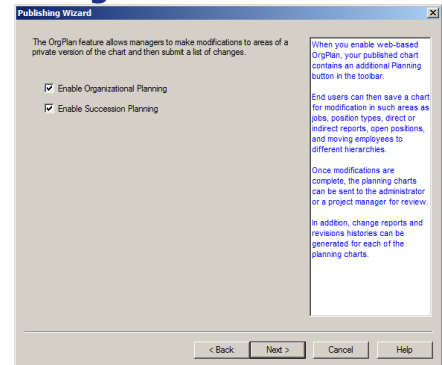
1. Prior to publishing create any Groups needed to secure toolbar buttons.
2. The EChart must have security invoked.
3. On the toolbar button selection window, locks will appear by each securable button.
4. Click on the lock to display securing options
5. Click to select individual Groups or click on (Select all groups) to include all Group results.




6. After selection, the lock will appear closed and the button will have a green filled square indicating that it is available for the restricted viewing audience.
7. Only users who are in the selected Groups will be provided the Print and Print Preview buttons when they access the published EChart.

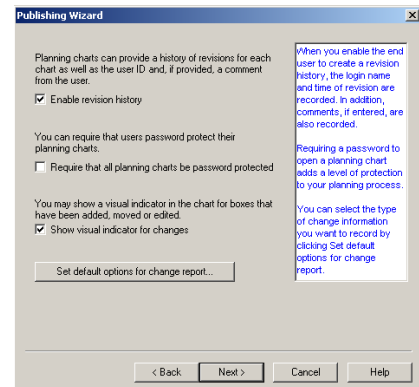
3.11 Enable Organizational Planning or Succession Planning

- These features are available for PluginX and EChart Rich Client published charts.
- Click to select the options you wish to have available for viewers of the published chart. Please see Organizational Planning Options or Succession Planning Options section of this manual for more details on the additional options available for each.
- Select Next.



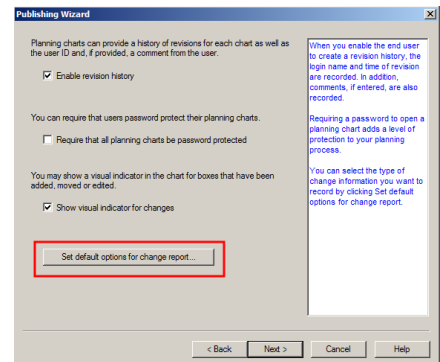
3.11.1 Planning Chart Settings

- Options for reporting are available if Organizational Planning or Succession Planning is enabled.
- Enable revision history forces a prompt for a free text notation on changes made when the user saves the planning chart.
- Requires that all planning charts be password protected does not let the user save the chart without setting a password.
- Visual indicator option will place an icon in the top right of any box where changes have been made in the planning chart. 



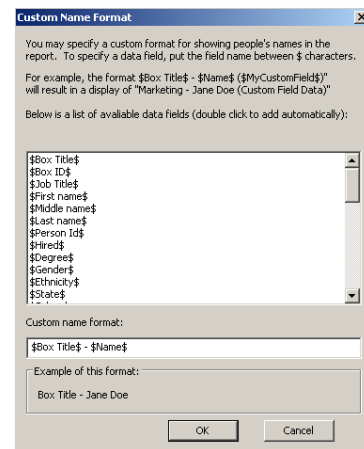
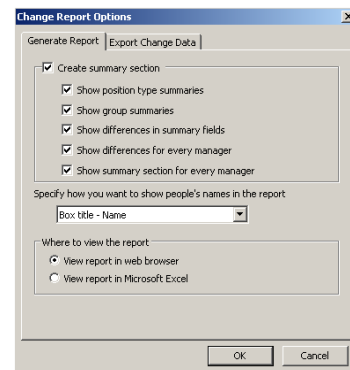
3.11.2 Set Default Options for Change Report

- Select Set default options for change report button.



General Report Tab

1. The summary section offers the option to display differences in summary fields and a summary section for each manager.
2. The display of person's names within the change report is customizable. Select the drop down to choose preferred display.
3. If custom is selected, you can build the desired format.
4. By default the Box title and Name are loaded into the Custom name format: box. To remove these, select the text and press the delete key on your keyboard.
5. Scroll to locate the first field you wish to display.
6. Double click on the field and it will be placed in the Custom name format: box.
7. To add a second field, scroll to locate and then double click on the field. A hyphen (-) will separate be added to separate the fields of data.
8. Sample output is displayed under the Example of the format: area.
9. Click OK to complete.
10. Select to display the report as HTML in the Web browser or send the output to Excel.
11. Click OK.



Export Change Data

1. Select the default fields of data for inclusion in the Excel output of changed data.
2. **Please note:** Parent Box ID must be one of the selected fields in order to see the current and previous Parent Box ID data for a changed record.
3. **Sample Output**

Parent Box ID	Previous Parent Box ID	Box ID	Previous Person ID	Box Title	Job Title	First name	Last name
106	98	216	206	Joshua	LaPorte	Joshua	LaPorte
106	98	216	206	Hannah	Coleman	Hannah	Coleman
106	98	206	203	Caren	King	Caren	King
106	98	203	203	Sharon	Stuart	Sharon	Stuart
106	98	205	205	Denise	Grace	Denise	Grace
106	98	201	201	Karie	Jameson	Karie	Jameson
106	98	204	204	Sally	Johnson	Sally	Johnson
106	98	210	210	St Writer	Kirk Spaulder	Kirk	Spaulder
106	98	210	210		Donita	Donita	Veccione

Change Report Options

Generate Report: Export Change Data

The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.

Specify which fields you want to display with each record:

- Parent Box ID
- Box ID
- Person ID
- Box Title
- Job Title
- First name
- Middle name
- Last name
- Hired
- Degree

Select All Clear All

OK Cancel

3.11.3 Planning Chart Storage

An additional option window is offered when charts are published as EChart Rich Client. The chart administrator identifies if the charts are to be stored on user's local hard drive or on the EChart server.

Publishing Wizard

With secure ECharts, there are two options for where to store the planning charts:

- Store planning charts on the user's local hard drive. With this option, charts may be shared with other users via email.
- Store planning charts centrally on the EChart server. With this option, planning charts can be shared more easily. Each user will automatically have access to planning charts that exist at or below the user's section of the hierarchy.

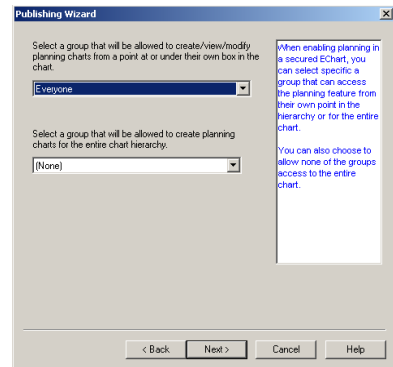
Specify the folder on the web server that will be used to store planning charts. It is strongly recommended that this folder be secured so that it is accessible to the EChart server but not HTTP requests:

When enabling OrgPlan in secured ECharts, you can store the planning charts either on the end user's local hard drive or on the EChart server. Storing the planning charts on the server makes sharing the charts very easy, but it is essential that the folder be properly secured. Please enter file path (not a URL) for the storage folder.

< Back Next > Cancel Help

3.12 Limiting Access with EChart Rich Client

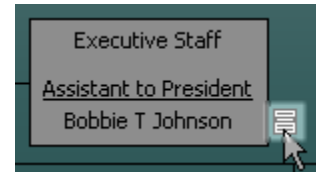
With EChart Rich Client, planning access can be controlled by Group membership. If security is active in an EChart, the wizard moves to this screen. A chart administrator should prepare Groups, prior to creating the publishing definition or modify the definition once they are created.



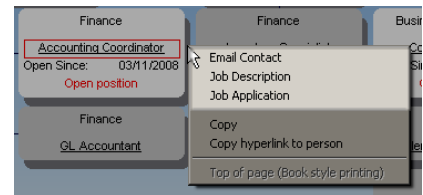
Planning chart access can be restricted to the span of control the user heads. A second Group identifies which viewers have access to create a planning chart under any span of control, including for the whole chart.

3.13 Define Context Menus

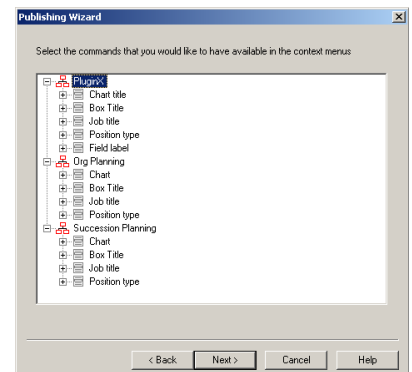
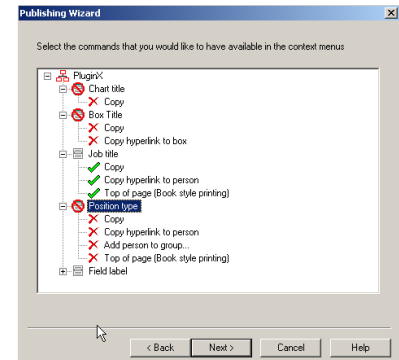
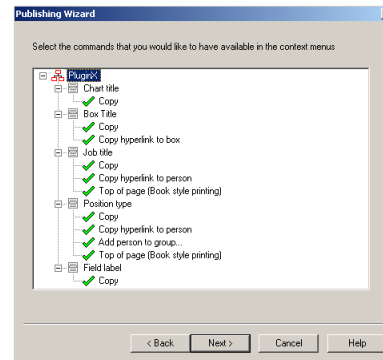
Viewers of a published chart have access to functionality from a context menu. As the user moves the mouse across the top of a box, the Context Menu button appears. A different set of chart action options are available if the mouse is over the Box Title, Job Title or Name. These options are selected by the chart administrator at publishing time.



If the chart box contains more than one Hotspot, the Hotspot links are listed above the chart action options in the Context Menu.

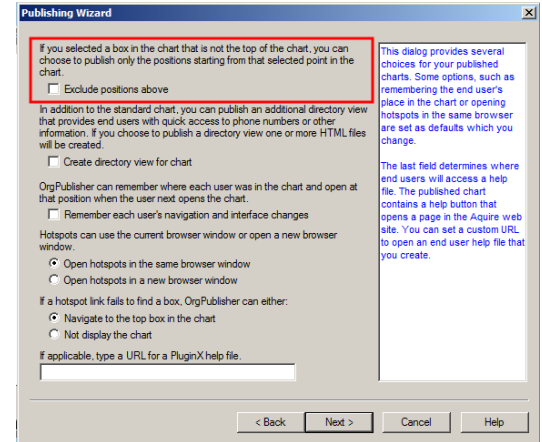


- Click the + by each category to expand the list of options.
- Click the - to collapse the option list.
- Click to select the desired option. A ✓ indicates the option is available. A X removes the option.
Please note: Copy options are only offered if Enable PluginX copy was selected as a Toolbar Option.
- If all actions under an option are removed OR if an option such as Box Title is clicked the Chart Action button is not available for that area of the chart box. ⓧ
- If Planning charts are activated, additional categories for setting context menus within these types of charts are available from this window.
- Select Next.



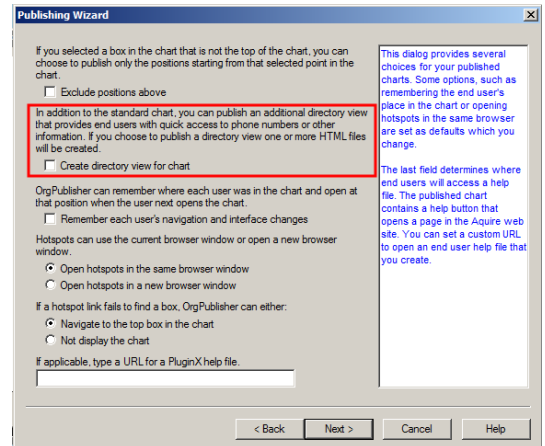
3.14 Exclude Positions Above

If a box is selected to be the top of chart prior to the creation of the publishing definition, the Exclude positions above option is active. This option publishes a chart containing only the selected section (span of control).



3.15 Directory View

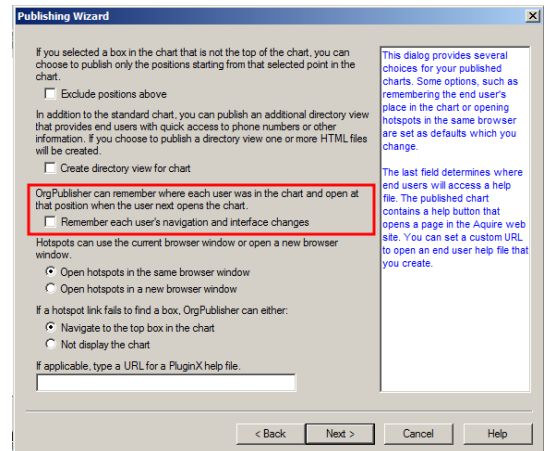
Create a Directory View – Separate files and link created for use as a phone directory. The Directory format is based on the List View layout of the opening Style. Even if you are not displaying the List View in the opening Style, you should format List View for the Directory output.



3.16 Remember User's Navigation and Interface

Remember each user's navigation and interface changes saves the options the viewer of the chart has made. Each time they open the chart, these settings are applied. The user's settings cannot override the behavior of the published chart. For instance:


- If the user has set a specific style as the opening style, but the style is removed by the chart administrator, the defined default style will be displayed.
- If the user has turned on a Summary View and the chart administrator no longer makes that available, the user will not be able to see the summary view.
- If the user is viewing a secured style and the next day is no longer a member of the group with access to the secured style, the user will be offered the default style that they can view. They will no longer have access to the secured style.



The settings "remembered" are listed below. The list is valid for PluginX, EChart Rich Client and Thin Client. Items marked as PluginX only are not available in Thin Client.

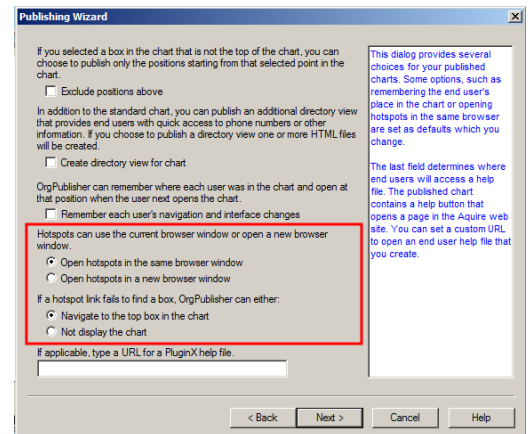
- Current Style (PluginX only)
- Selected Group
- Current top of chart
- Style View Pinned (PluginX only)
- View Zoom Percentage (PluginX only)
- Levels Shown
- Drill Buttons On / Off
- Tree View Shown and position (PluginX only)
- List View Shown and position
- Summary View Shown and position
- Summary Grid vs. Graphs (PluginX only)
- Profile View Shown and position
- List View vs. Search View

The settings are saved based on the name of the chart. There is 1 set of settings saved per chart. The viewer of a published chart can reset the settings at any time by clicking the Reset

Style to Published Value button - . The chart administrator can suppress the display of this button when creating the publishing definition using Advanced Mode.

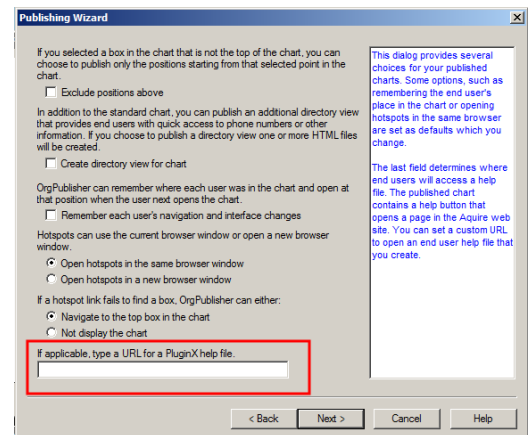
3.17 Hotspots

Select to open Hotspots in the current browser window or to launch a new window.



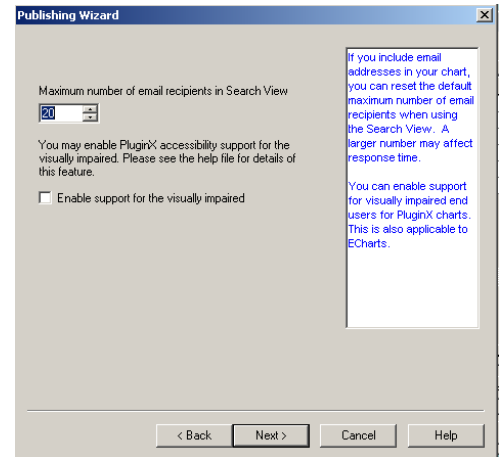
3.18 Custom Help File

By default, the Help button in a published chart points to the Aquire website. You can create your own help file and point to its location. This will default the Help button to your customized file.



3.19 Email and Visually Impaired Options

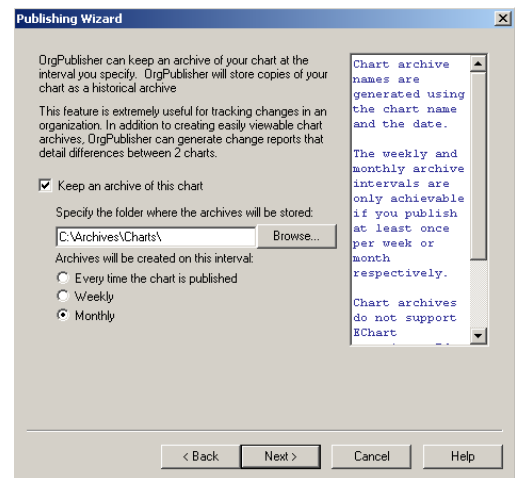
- If there is a custom field defined as an Email type, the chart administrator can restrict the maximum number of emails that can be sent at one time by a user. Users can send emails to a Group. By limiting the maximum number, the user would have to remove members from the group to reach the maximum allowed.
- The Enable support for the visually impaired provides functionality that allows chart viewing with JAWS® technology.



3.20 Archive Scheduling

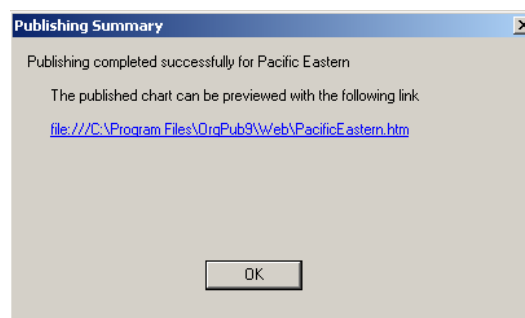
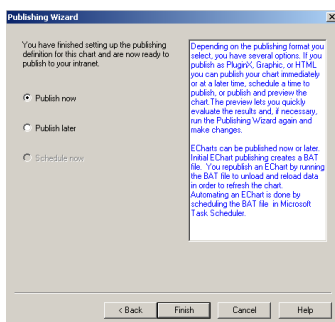
This feature allows you to schedule the archiving of your published charts. The files that are archived can later be compared and a change tracking report generated. It is recommended that you schedule the archiving at the same interval you are publishing your charts.

- Click to select that you want to Keep an archive of this chart.
- Indicate the location to store the archived charts. **Please note:** Charts should be stored in a secured area of your network.
- Click to indicate the frequency for archiving.
- Click Next.



3.21 Publishing

You can select to Publish Now or Publish Later. If you publish now, a completion screen appears with the link to the published chart. Click the link to see the results of your publishing selections. The Schedule Now option is not available with EChart publishing. EChart publishing requires setup on the EChart server. Please review the Scheduled Publishing section of this manual for more information.



4 Advanced Mode Publishing – Documents

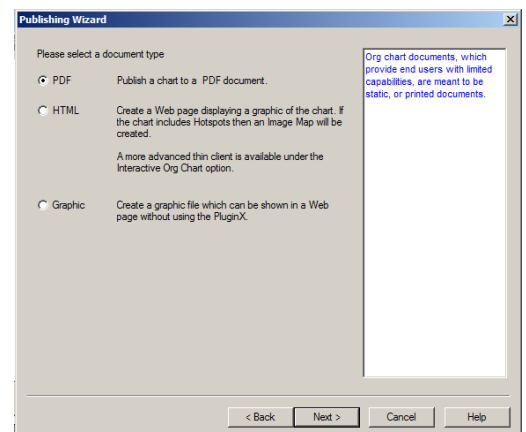
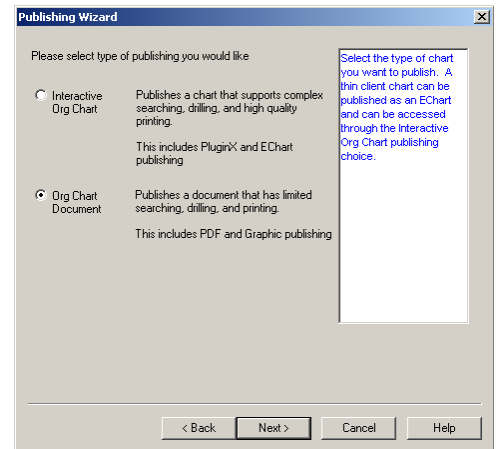
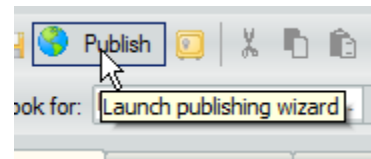
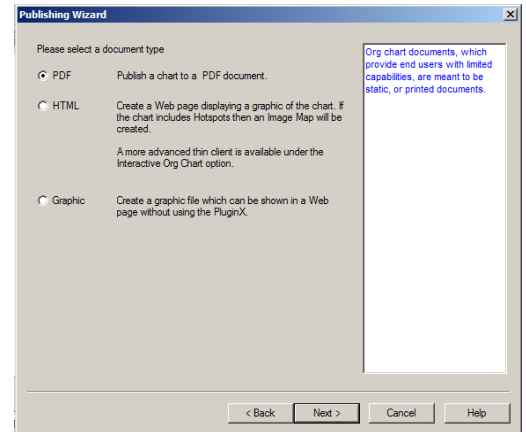
OrgPublisher offers 3 options as document output. The options provide less functionality than interactive publishing.

1. PDF – Produces a PDF document that can be emailed or placed on the intranet and opened with an Adobe Reader.
2. HTML – Produces HTML pages that have graphic images of the organization chart. There is an option to allow drilling. An HTML page and graphic are generated for each drilled page.
3. Graphic – Produces a graphic image of the organization chart.

4.1 Publishing Wizard

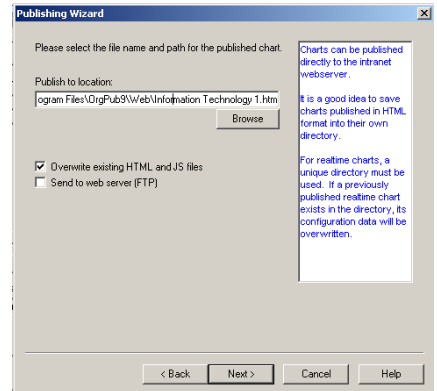
A publishing wizard is launched the first time you click the Publishing button. The Publishing Wizard displays different dialog boxes based on the type of output you select. The most common Publishing Options selected are PluginX, EChart Rich Client and EChart Thin Client. There are 2 options offered for publishing – Express Mode and Advanced Mode.

1. Select Advanced Mode and click Next.
2. Select Org Chart Document and Click Next.
3. Select the preferred publishing option and click Next.



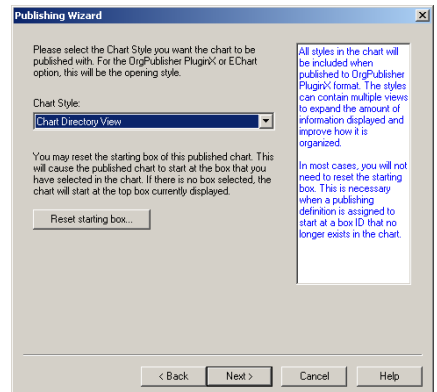
4.2 Publish Location

- Identify where the chart is to be published.
- Overwrite existing HTML and JS files should be selected if you or your web administrator do not customize the HTML produced. Please review technical documentation using an Alternate CAB File location.
- Identify if the chart will be sent to an FTP site.
- Select next.



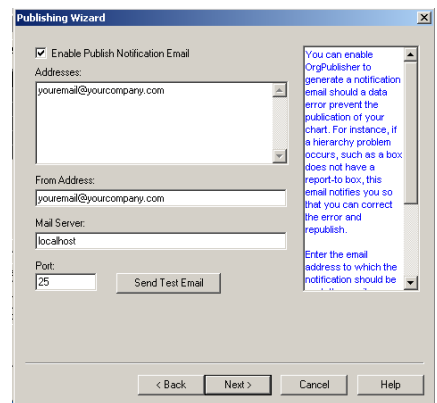
4.3 Default Style and Reset Starting Box

- Identify the publishing style. Document output produces a chart using a single style. If you have more than one style, you will want to select the preferred style for the output.
- Identify if the top box displayed should be reset. Click the reset button if a box was selected when you clicked the publishing button. This will prompt you to confirm you want the selected box to be the opening top of chart.
- Select next.



4.4 Publishing Error Notification

- Identify who should be notified if there are data errors at publishing time.
- Select next



4.5 PDF Page Layout

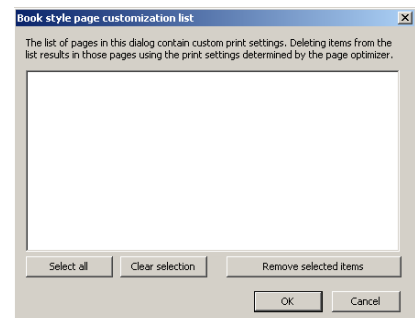
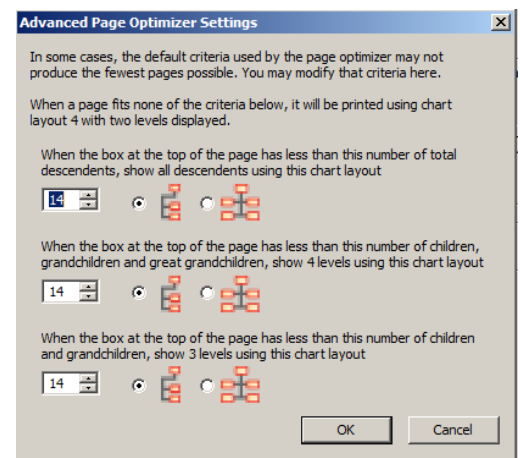
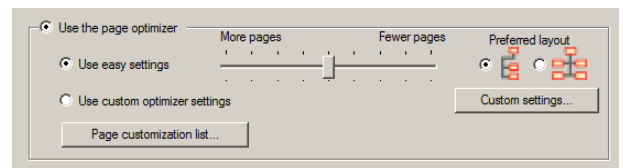
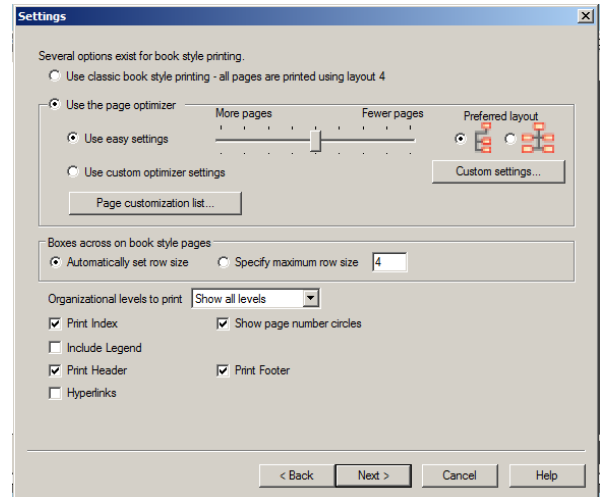
PDF output, by default, will use the settings that are saved when viewing Book Style printing. If the chart administrator has not used Print Preview, this window provides settings to control the page layouts in the PDF. There is no preview option available from this window.

1. Use classic book style printing – This option breaks the chart into 2 levels using Chart Layout 4 on all pages.
2. Use the page optimizer – This selection provides the following options:
 - 2.1 **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.
 - 2.2 **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.

Advanced Page Optimizer: 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.

- 2.3 **Page Customization List:** Display a list of previously set page customizations. This example has no customizations saved. More information on Page Customizations is available in the Printing Manual.

- 2.4 Boxes across on book style pages – This gives you the option to control the number of boxes displayed across on pages that use Chart Layout 4 (wrapped and stacked boxes). You can let OrgPublisher automatically set the number or indicate the number you prefer for each line of boxes.



Boxes across on book style pages

Automatically set row size
 Specify maximum row size

- 2.5 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 ▼

- 2.6 Select to zoom each page, show page number circles, print Group icon legend, print an index and a Header or Footer. A ✓ indicates an option is selected.

Print Index Show page number circles
 Include Legend
 Print Header Print Footer
 Hyperlinks

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 display 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. If Hyperlinks is also selected, the page numbers serve as links to jump to the correct page.

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.

Print Header places a header on each page of the PDF using the settings established by the chart administrator in Print Preview or the defaults provided by OrgPublisher.

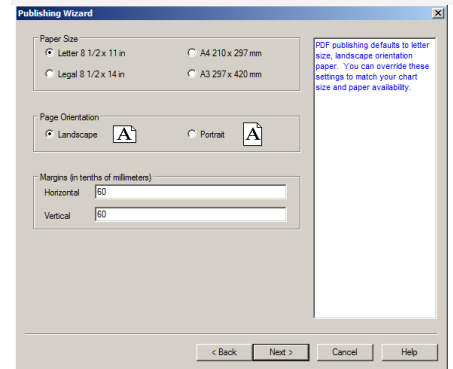
Print Footer places the footer on each page of the PDF using the settings established by the chart administrator in Print Preview or the defaults provided by OrgPublisher.

Hyperlinks enable any hotspots or pages in the page circles (if they are displayed).

3. Once all changes are made, click OK.

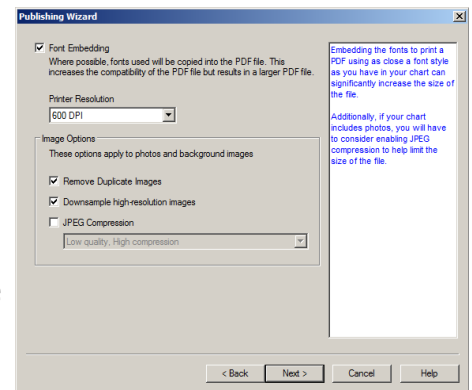
4.6 PDF Page Size and Orientation

Use this window to set paper size, page orientation and margins. Click Next to continue.



4.7 PDF Font Embedding, Resolution and Image Options

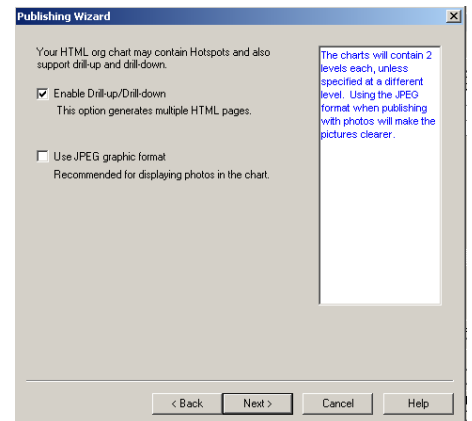
- Font Embedding – if you are using a non-standard font, this will place the font within the PDF file. This eliminates the substitution of the non-standard font within the published PDF.
- Set the printer resolution for use in the publishing of the PDF.
- Image Options provide control for photos and background images in the chart. Selecting these options can reduce the size of the resulting PDF. Higher resolutions do provide higher quality images.



4.8 HTML Drilling

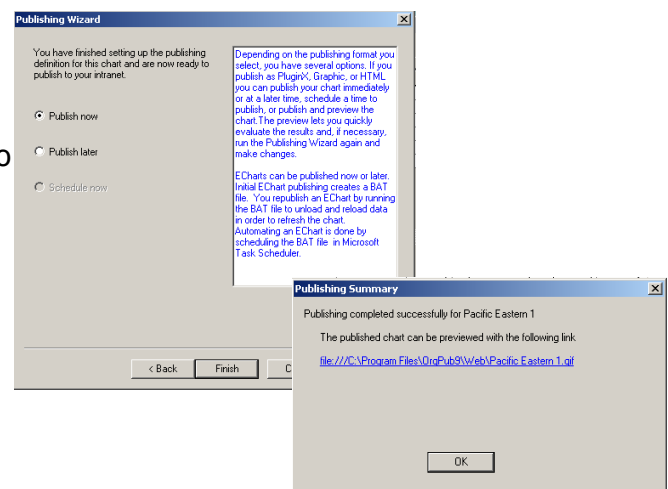
If HTML is selected, the option to enable drill-up and drill-down is offered. This option will generate multiple HTML pages and graphic images.

If photos are displayed in the chart it is recommended to set JPEG as the graphic output format.



4.9 Publishing

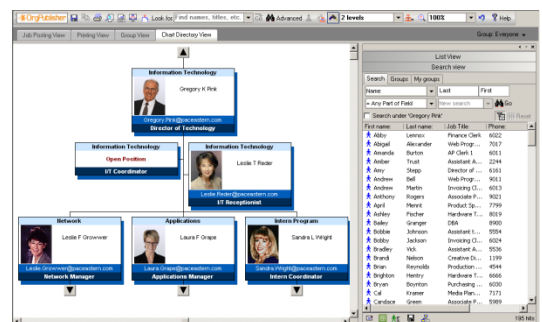
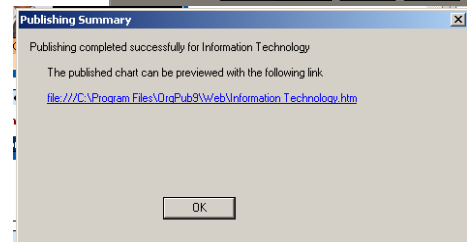
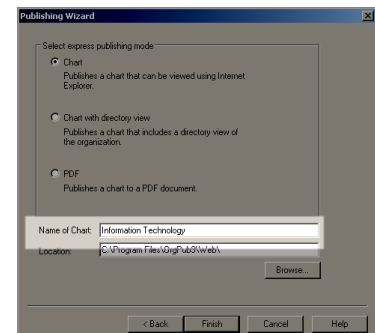
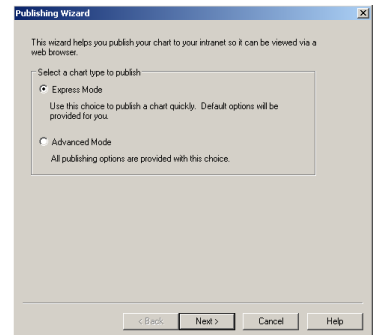
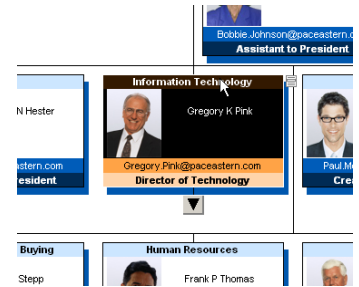
You can select to Publish Now or Publish Later. If you publish now, a completion screen appears with the link to the published chart. Click the link to see the results of your publishing selections.



5 Publishing Multiple Charts from a Single Formatted Chart

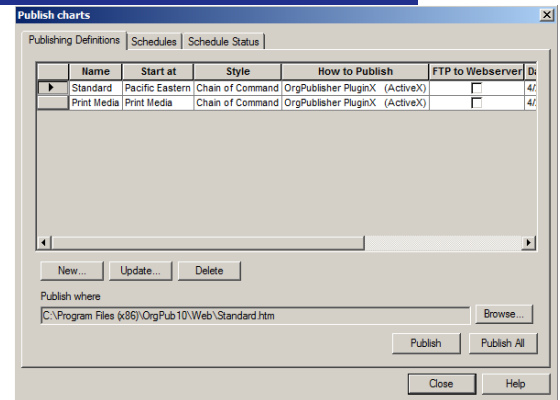
If you need to produce charts for multiple organizations, this can be done from one master chart.

- To publish a chart of another area of the organization, select the top box of that organization.
- If a publishing definition for this portion of the organization does not already exist, the publishing wizard will launch. Select Express or Advanced Mode.
- In this example, Express Mode is selected. The name of the new publishing definition name uses the Box Title (department name) of the organization. Click Finish.
- To view the published chart, click on the link provided.
- The published chart opens to the Information Technology organization.
- The published chart does contain all records of the source chart (note the drilling arrow above Gregory Pink's chart box). This indicates that the Exclude positions above option was not selected.



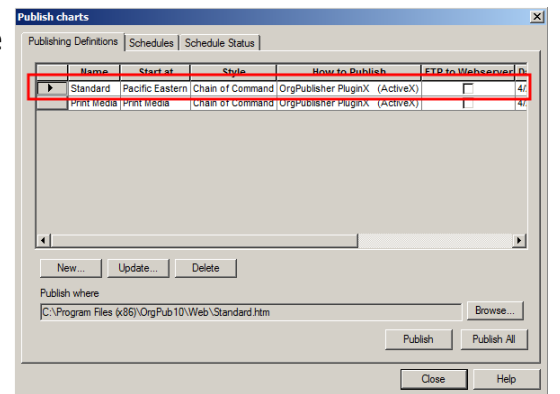
6 Publish Charts Window

If a publishing definition exists when the Publish button is selected, the standard Publish Charts window appears. This is a list of existing publishing definitions.



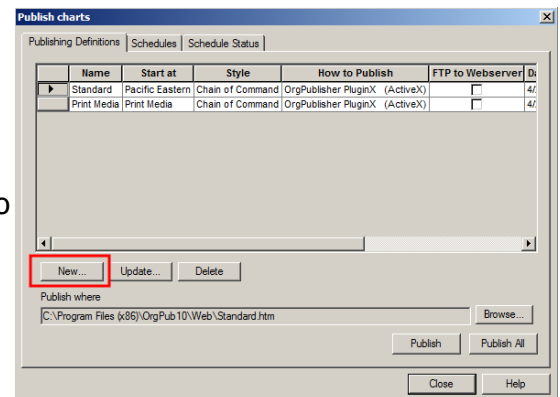
6.1 Modify an Existing Publishing Definition

If you wish to modify an existing publishing definition, select the definition and click Update. Selecting the Update button takes you to the Advanced Mode wizard.



6.2 Create a New Publishing Definition

You can create a new publishing definition in the Published Charts window. Click the New . . . button to create a new publishing definition. You will be prompted for Express or Advanced mode publishing. If a publishing definition and chart exists with the default name, the wizard will append, 1, 2, etc. to the end of the name.



7 Screen Capturing from PluginX Disabled

Charts published as PluginX will have the **Alt+Prnt Scrn** function turned off. This eliminates the ability for the user to use these keystrokes to take a screenshot of the published chart is open. When the user exits the web page containing the published chart, the functionality is re-instated.

Please note: This does not eliminate screen capturing for users who have Snagit® or other 3rd party screen capturing software installed.

8 Scheduled Publishing

Automatic publishing of organization charts is built into OrgPublisher. This feature allows you to set the time and frequency for publishing charts.

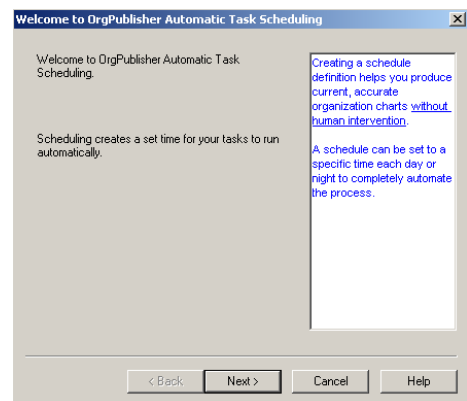
Please Note:

- If you are required to FTP to your server, this is defined in the Publishing Definition.
- If you have previously created a publishing definition, but have not set up scheduling, follow the steps below.
- If you have not previously created a publishing definition, the opportunity to set a schedule is offered on the last screen of the wizard in Advanced Mode publishing.
- OrgPublisher should not be open on the machine when a job is scheduled to run.

8.1 Schedule When Creating a Publishing Definition

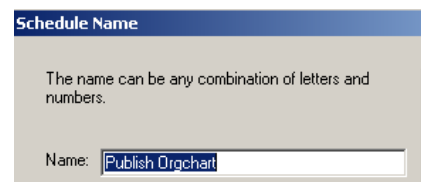
This option is not available if you are creating a publishing definition for an EChart. See section on EChart Scheduling later in this document. It is offered when publishing as a document or PluginX.

1. Select Schedule Now
2. The scheduling wizard opens, click Next.

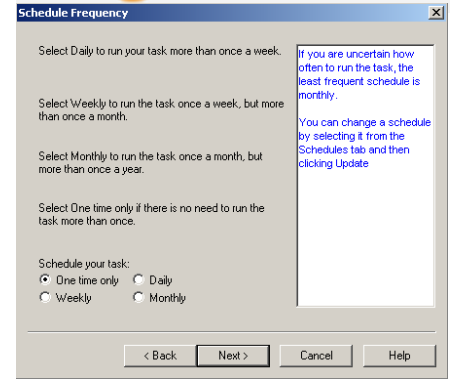


3. Type in the name for the schedule and then click Next.

Please Note: You can use the same name as the publishing definition. This name should be meaningful so you can remember the job being run if you need to troubleshoot any problems that occur.

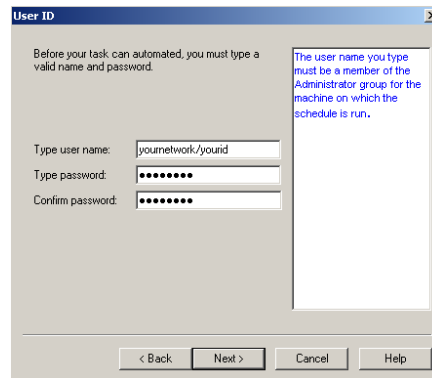
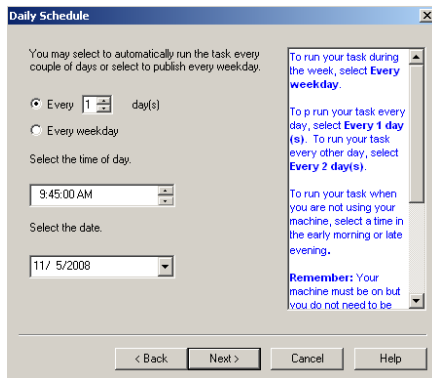


4. Select the desired frequency.

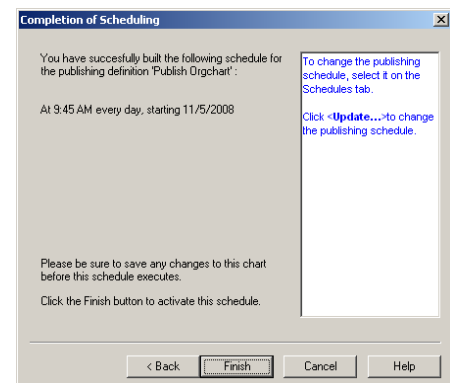


5. The next screen will vary depending on the schedule option selected previously. Select dates, times, frequency and then select Next.

Please Note: You must have Local Group Administrator privileges on Windows NT or Windows 2000.



6. Click Finish.



8.2 View, Edit or Create Publishing Schedules

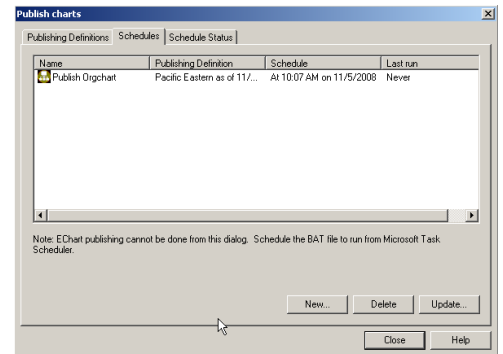
Publishing schedules can be created at a later time. Existing schedules can be viewed or edited.

Please Note:

- If you are accessing OrgPublisher via Web Administration (application is installed on the server), then the Schedules tab will not appear. The following steps would be used in Web Administration.

- Log on the server as an admin or power user.
- Open the desktop OrgPublisher application. (If default install is used, it would be in c:/program files/orgpubx).
- Open the chart (found in the SourceCharts folder).
- Schedule the publishing definition in OrgPublisher using the Schedules tab per following instructions.
- Also, when you are publishing to ECharts, you must manually schedule the .BAT file created in the first manual publishing. To do this, open the Task Scheduler on the server to add the .BAT job.

1. To see publishing schedules, click the Publish button and then select the Schedules tab.
2. Select New to create a new schedule with the Publishing Wizard.
3. Select a schedule in the list and then select Update to modify an existing schedule.



Please note: If you choose to have more than one schedule, make sure that you set up enough time for each schedule to complete before the next one begins. The reason for this is that several schedules may use the same data connection files, and errors will occur if another scheduled job has these files open at the same time.

8.3 EChart Scheduling

In order to schedule an EChart to publish, you must logon to the EChart Server and open the chart with OrgPublisher. Follow these steps to produce a publishing schedule.

1. Publish the EChart one time using the Publishing Wizard. This will create your .BAT file.
2. Run the batch (.BAT) file. This file assumes that publishing and server processing occur on the same machine.
3. Open the Windows Task Scheduler from the Control Panel in Windows 2000 and XP, or from My Computer in Windows NT.
4. Double-click Scheduled Tasks. The Scheduled Tasks window displays.
5. Double-click Add Scheduled Task and follow the wizard prompts to set up a scheduled task.

Please Note: You can modify the batch file (.BAT) produced by the Publishing Wizard in order to publish to a location other than the web server. Doing this may minimize EChart downtime, if your chart is extremely large (200,000+ records) or if resources are limited on the web server. EChart publishing is very CPU intensive and may affect other processes running on the server. The batch file must be modified so that the following steps occur in this order:

1. Move the EChart files to the server (if not publishing directly to the server).
2. Unload the EChart from the server's memory.

3. Reload the EChart into the server's memory. The batch file will not be overwritten during publishing, so any modifications you make will be preserved.

8.4 Testing a Publishing Schedule

To verify that your automatic publishing schedule works, you may wish to set the job to run one time, two or three minutes after the current time on your PC. Then reopen the Publishing Wizard, either by clicking the Publishing button or Tools/Publishing Wizard. If you scroll right, each publishing definition has a Date Published status.