

OrgPublisher Views



OrgPublisher 10 Training

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9.1 Style View47

9.2 Wizard View47


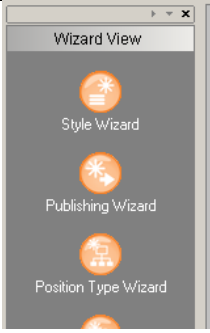

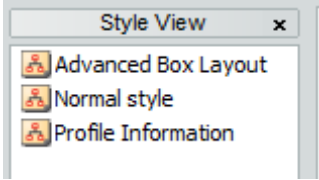

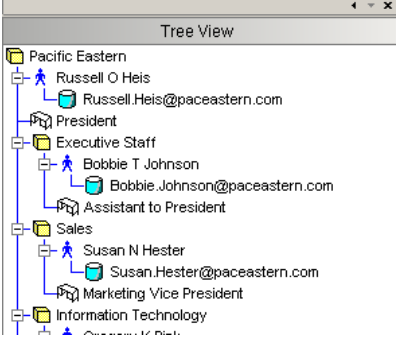
1 Views

In addition to the normal Chart View, OrgPublisher provides several Views that can be used to present analytical data within the chart. The Views toolbar is visible to the chart administrator. The chart administrator can choose to show the Views toolbar or specific view buttons if the chart is published as PluginX or as an EChart.

Styles Toolbar



Toolbar Samples

<p>Wizard View is only available for the chart administrator</p>		
<p>Style View</p>		
<p>Tree View</p>		

List View

The List View also contains a Search View (2nd screenshot)



List View

Name	Job Title	Box Title	Phone	Email	0
Jason Bratton	Benefits Manager	Benefits	5999	Jason.Bratton@Corp	
Sally Cane	Media Coordinator	Media	5466	Sally.Cane@pa Corp	
Ryan Dozier	Controller A	Finance	7013	Ryan.Dozier@pa Ann	
Hal Glorian	Payroll Manager	Payroll	6555	Hal.Glorian@pa Corp	
Laura Grape	Applications Manager	Applications	9000	Laura.Grape@pa Corp	
Leslie Growwer	Network Manager	Network	4999	Leslie.Growwe Corp	
Russell Heis	President & CEO	Pacific Eastern	7999	Russell.Heis@o Corp	
Susan Hester	Marketing Vice President	Sales	6999	Susan.Hester@ Corp	
Raymond Jessup	CFO	Finance	7014	Raymond.Jessa Corp	
Jonathan Jester	Account Executive	National	6444	Jonathan.Jester Corp	

List View

Search View

Search Groups

Name: Last First = Any Part of Field

New search Go

Search under 'Russell Heis'

Name	Job Title	Box Title	Phone	Email
Emily Abbott	Media Coordinator	Media	7018	Emily.Abbott@pacifceas
Lisa Abbott	Purchasing Agent 1	Finance	6028	Lisa.Abbott@pacifceas
Cheryl Adelsperger	Benefits Specialist	Benefits		
Abigail Alexander	Web Programmer	Web	7017	Abigail.Alexander@pacif
Gail Amster	Product Specialist	National	2277	Gail.Amster@pacifceas
Caroline Anderson	Accts Rec/Cash Mgr	Finance	7010	Caroline.Anderson@pac
Olivia Bailey	Programmer	Business A...	6014	Olivia.Bailey@pacifceas

Profile View



Profile View

0 pinned

Photo

Name: Amy Stepp
 Job Title: Director of Media
 Box Title: Media Planning & Buying
 OfficeBldg: Sales Office 2
 Phone: 6161
 Email: Amy.Stepp@pacificeastern.com

Summary View

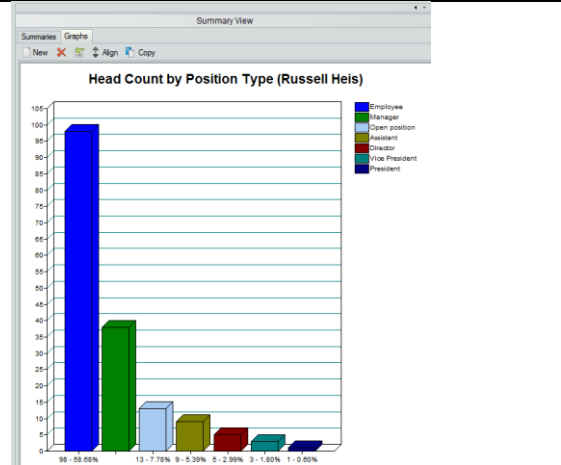
The Summary View also contains a Graphs View (2nd screenshot)



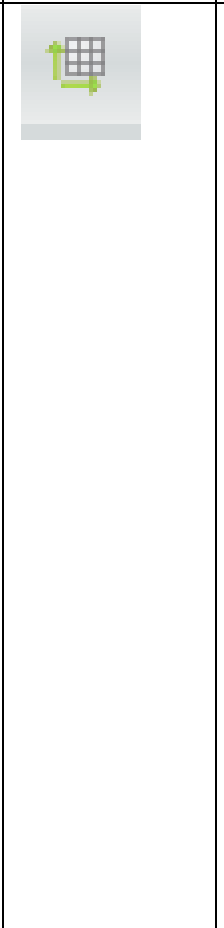
Summary View

Summaries Graphs

Position type	Include in Summary	Count
President	Yes	1
Vice President	Yes	3
Director	Yes	5
Manager	Yes	38
Employee	Yes	98
Assistant	Yes	9
Indirect Report	No	
Total Head Count		154
Open position	Yes	13
Total Planned Head Count		167
Everyone		208



9 Box View – OrgPublisher Premier



9 Box Matrix

Potential

Caren King	Jared Hill Lyle J Johnson Carol M Jones Stephen Y Purl	Trent D Graph Susan N Hester Kayla K Melton David Smith Frank P Thomas James W Trent Bradley H Vick
Joseph Hunt Denise Hutchison	Lisa Abbott Caroline Ande Justin Baxter Bryan Boynton Jenny L Bryan Linda Bullock Sally Cane Lynn K Freight Hal Glorian Bailey H Grant Laura F Grape Candace M Gr	Ryan B Benn Carl L Best Kimberly T Buc Amanda Burc James T Doug Lester Y Fern Jessie L Fister Elvis R Frankli Leslie F Groww Brighton K Her Yei P Kingston Cal Kramer
Cheryl Adelsperg Julie Cagney Denise Grace Catherine Grazer Karie Jameson Tamara Lacey Donna Richards Cita Rollinson Sharon Stuart Lawrence Times	Henry K Banne Mia P Banniste Elizabeth Bart James Bates Jeffrey A Baue Jason Bratton Mary A Calliste Tyler Carlton Renee B Clap Katherine Clay Hannah Coler Kula Collie	Susan I Bright Ryan Dozier Louis R Gift Bobby Jacksc Greta Johann Bobbie T John Clark P Kristy Paul M Melbra Brandi B Nelsc Molly Nichols Kimberly Ojoh Paul W Quinn

Performance

Show Charted Properties...

2 Working with Views

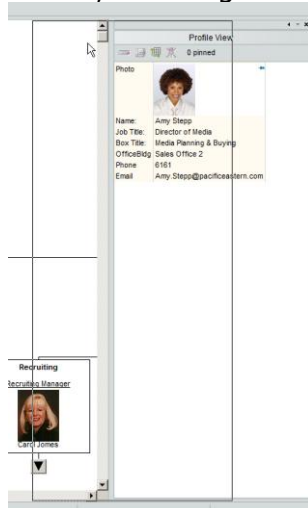
All View options are displayable within the chart. As the chart administrator, you can decide Style by Style what Views will display when the user opens the chart and moves to a particular Style. Views can be docked in one place or you can float them. You can also remove or size views. When creating styles in OrgPublisher, you can select which views should become part of that style.

2.1 Docking a View

1. Place the mouse pointer on the grab bar area of the View window. Hold the left mouse button down and drag to a new location.

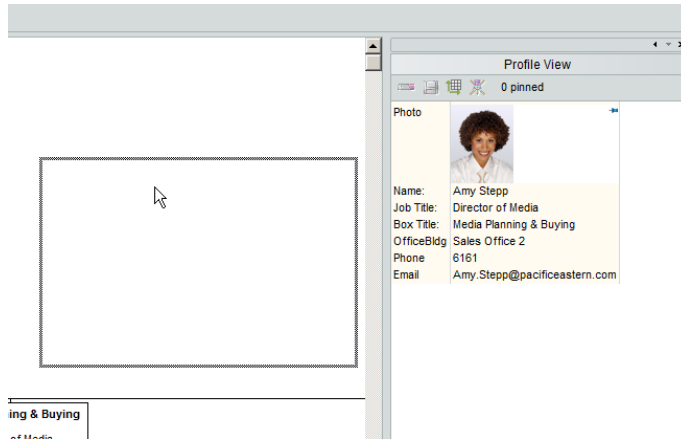


2. An outline of the View displays as you are dragging to a new location on the top, bottom, left or right side of the chart. Release the mouse button to dock the View.

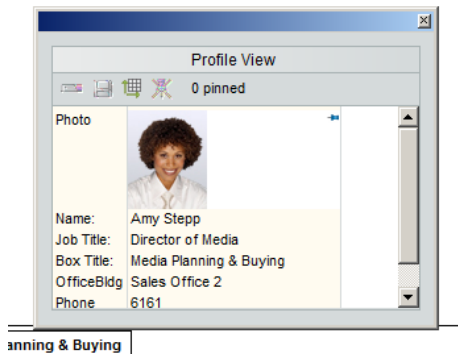


2.2 Floating View

1. Place the mouse pointer on the grab bar area of the View window. Hold the left mouse button down and drag to the chart area of the screen.

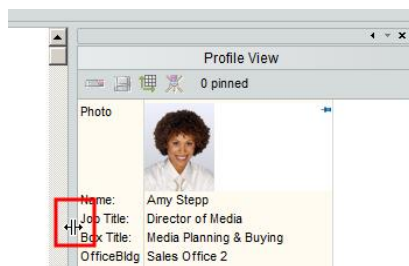


2. Release the mouse button when the View is in the desired position.



2.3 Sizing a Docked View

1. Place the mouse pointer on the edge of the View window.



2. If the View is docked on the left or right side of the chart window, drag to the left or right to increase or decrease the width of the window. If the View is docked on the top or bottom of the chart window, drag up or down to increase or decrease the window height.

2.4 Closing a View

Click the X button on the grab bar OR click the toolbar button to close a View.

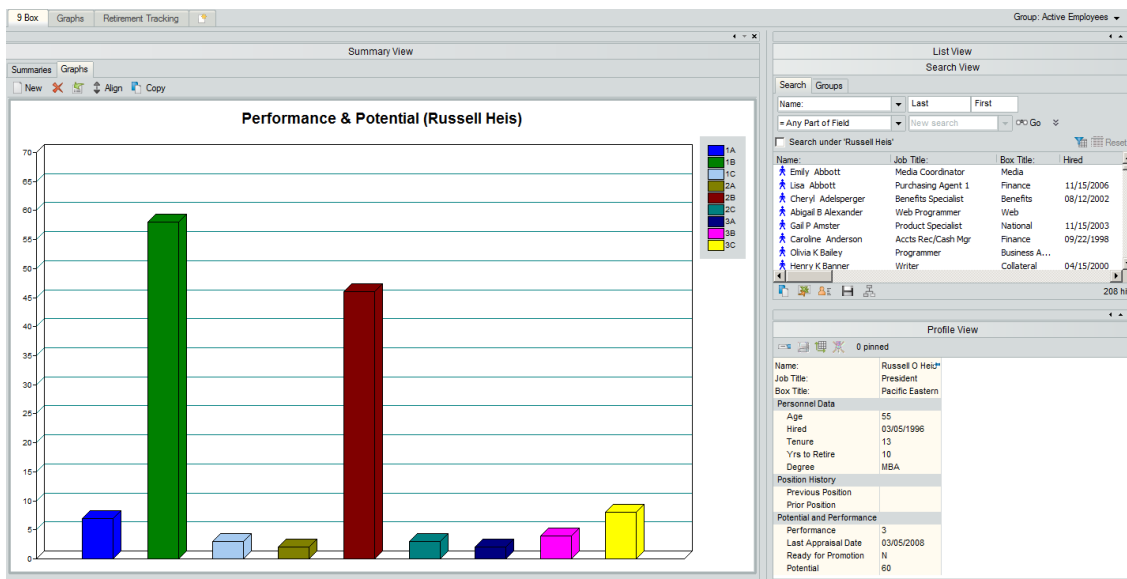


2.5 Maximized Mode for Docked Views

Views – Summary, Tree, List, Profile and 9 Box – can also be docked and then maximized to fill the screen. This feature provides a method to create a “dashboard” style with workforce analytics available for your management team. This feature is available in charts published as PluginX and EChart Rich Client.

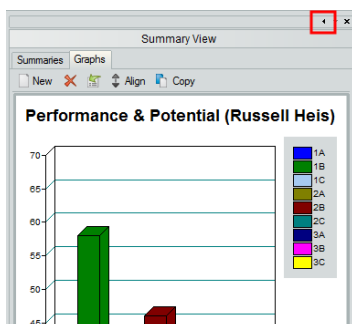
When views are maximized, toolbar buttons that are not usable with the view will be grayed out. Views can be maximized if they are docked on the right or left side of the chart window.

In the example below, the Profile, Summary and Search View are displayed. The Summary View is maximized. The Profile View and Search View are not maximized. If a View is not maximized, it can be sized by dragging the left or right edge.

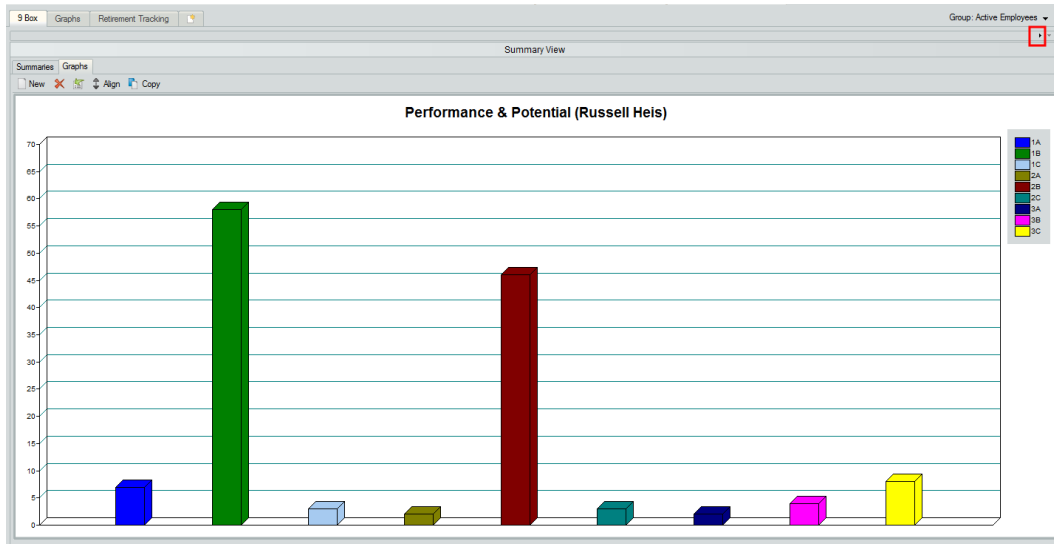



2.5.1 Maximizing a View

1. Open the View.
2. Click the Maximize button (highlighted below).



3. The View will maximize to fill the screen



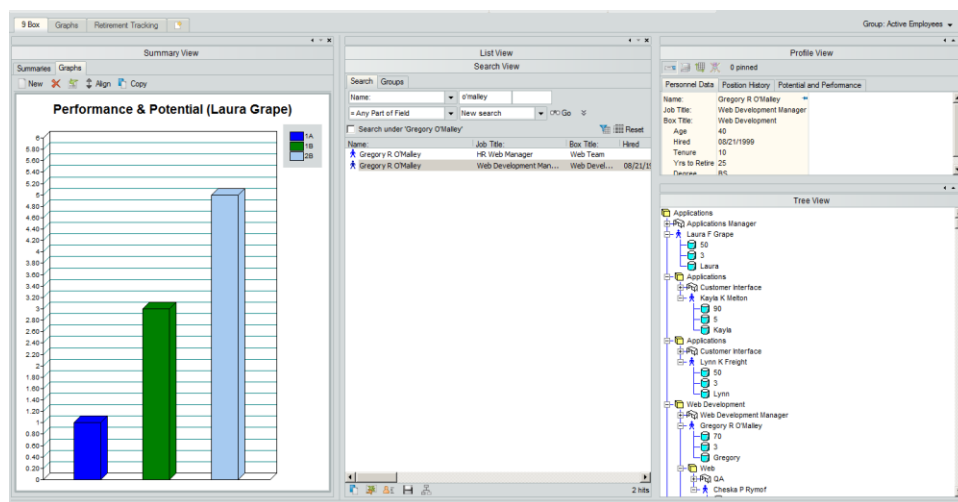
- Click the Restore View button  to set the View to its previous size. You can also close the View and re-open to reset the size.

2.5.2 Opening More Than One View

- Open all Views you wish to display.
 - If you wish to create a dashboard, create a style. Then, begin opening your desired Views.
- Dock the Views and size as needed.
- Maximize the primary View.

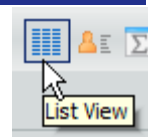
Please note: Only one docked View can be maximized at a time. If a second view is maximized, the first View is restored to its original size.

If the Graph View is active, as you click on an individual's name in the List View or Tree View, the graph may change based on the number of levels displayed in the underlying chart. In this example, 2 levels are displayed. When Gregory O'Malley is selected, he is on the 2nd level of the displayed chart. The graph now reflects the current top of chart is Greg's Manager.



3 List View

The List View displays Custom Field data in a spreadsheet style. The List View can be customized for each Style in the organization chart. The List View contains two panes - List View and Search View. The fields display in the same order for both Views within a Style.



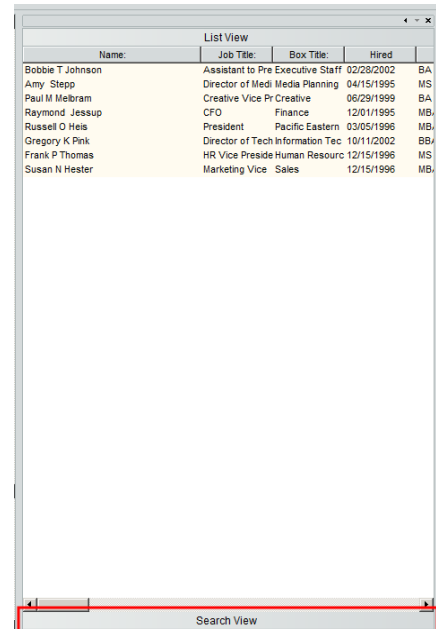
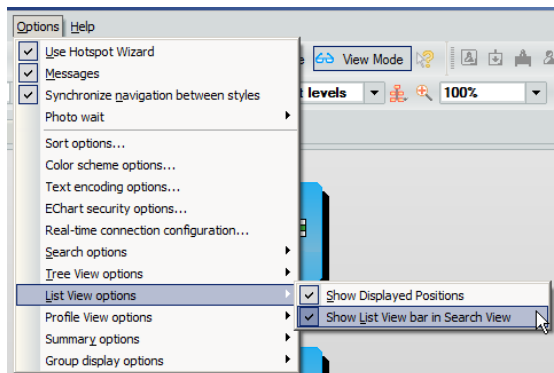
- The List View displays a listing of employees currently displayed in the chart, along with any available Custom Fields you wish to display.
 - Original List View feature from OrgPublisher Version 3
 - Select the specific records or all of the records to copy to the clipboard.
 - Sort any column of data by clicking on the column button.
- The Search View can display all records passed into the chart.
 - Search
 - Save Search criteria as a Group
 - Send the search results to Excel
 - Copy the search results to the clipboard
 - Send the Search result list to Profile View for display
 - Spotlight chart boxes of the people in the search results list
 - Sort any column of data by clicking on the column button

3.1 List View Defaults

As a chart administrator, you decide which pane is active for the user. When the user clicks on the List View button or if you have it turned on in the Style, you control what the user sees.

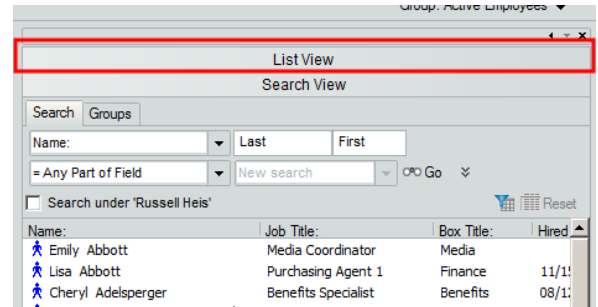
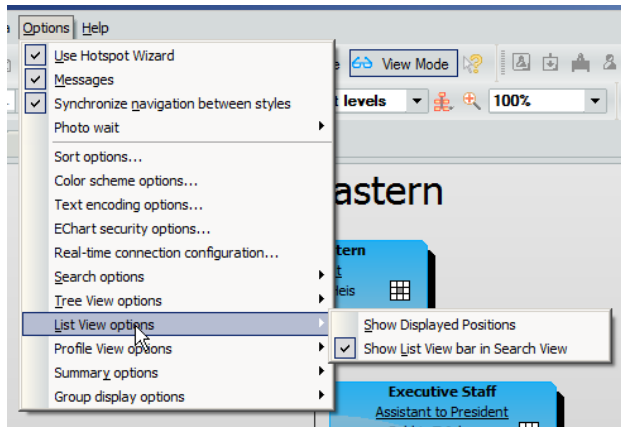
3.1.1 Display the List View Pane by Default

1. Click on Options, and then click on List View options.
2. If both options are checked, the List View is open and the Search View pane is minimized at the bottom of the View.



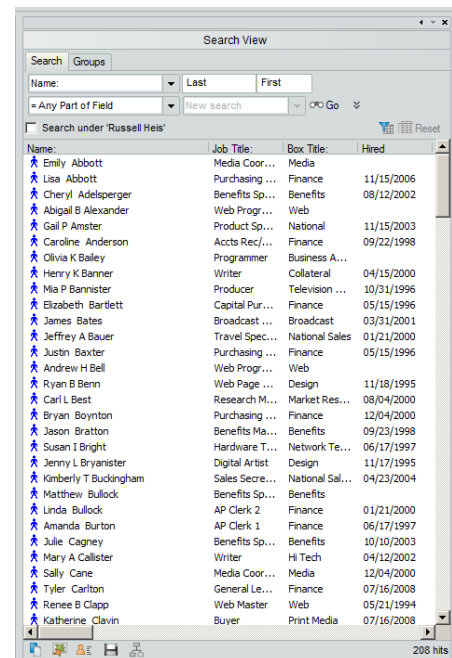
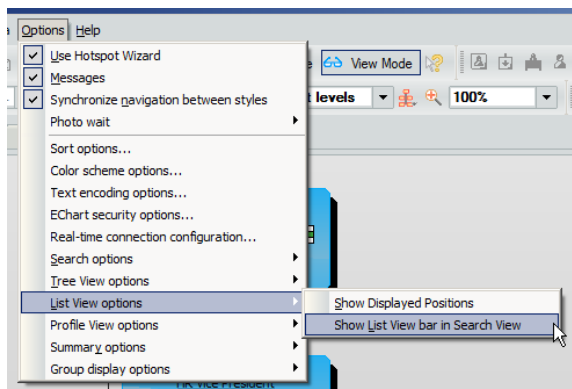
3.1.2 Display the Search View Pane by Default

1. Click on Options, and then click on List View options.
2. If Show Displayed Positions is NOT checked, the List View is minimized at the top of the View, and the Search View is opened.




3.1.3 Display the Search View and Hide the List View

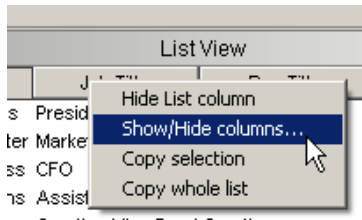
1. Click on Options, and then click on List View options.
2. If neither item is checked, the Search View is open, and the List View is not available or hidden.



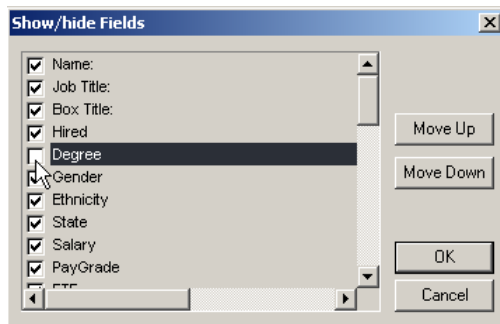
3.2 Modify List View

Please note: Formatting changes affect the current style. Each Style can have a unique layout for the List View.

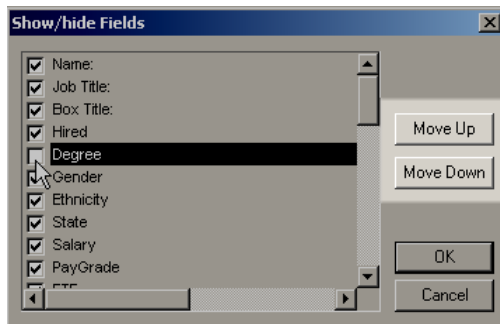
1. Select the List View button to display. 
2. The fields displayed and their order can be setup from either pane.
3. Right click on any column heading to modify fields displayed. Select Show/Hide columns . . .



4. Click to place a check mark to select or remove a checkmark to deselect fields to display. Click OK.



5. You can also re-order the fields displayed by selecting the field and then clicking on the Move Up or Move Down button.

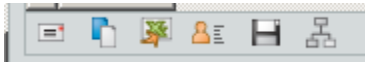


Please note: The layout of the List view results will be used to set up the output when a Directory is published. (See the *Publishing* manual for more information.)

3.3 Search View Pane Functionality

The Search View pane provides the users many capabilities to analyze, navigate, filter, and extract data. To read more about how to Search see the *Search and Group* manual. A list of the functionality and a brief description are provided below.

- Enables end users to search chart information and create their own Groups.
- The Search View is style specific, and opens with the List View button. It displays the same columns shown in the List View.
- The Search View displays everyone in the chart or a selected section of the chart or group.
- Below the search results are buttons that provide additional functionality.



- To use results to send an email to everyone in the list, click:



Please note: This is only available if the email address is a custom field and the field type is defined as email.

- To copy and paste search results into any Windows based application, click:



- To send search results directly to Excel, click:



Please note: This is only available in published charts if activated in the publishing definition. To learn more, see the *Publishing* manual.

- To save search criteria as a Group for re-use in the future, click:



- To use search results to set the criteria for Spotighting, click:



- Include Search Results in the Profile View



4 Profile View

The Profile View organizes the display of Custom Fields, Photo, Name, Job Title, and Box Title. The Profile View can be customized for each Style in the organization chart. In addition, unique Profile Views can be created for the Name, Job Title, and Box Title areas of the chart. Available fields for display are based on the assignment made when Custom Fields were defined.

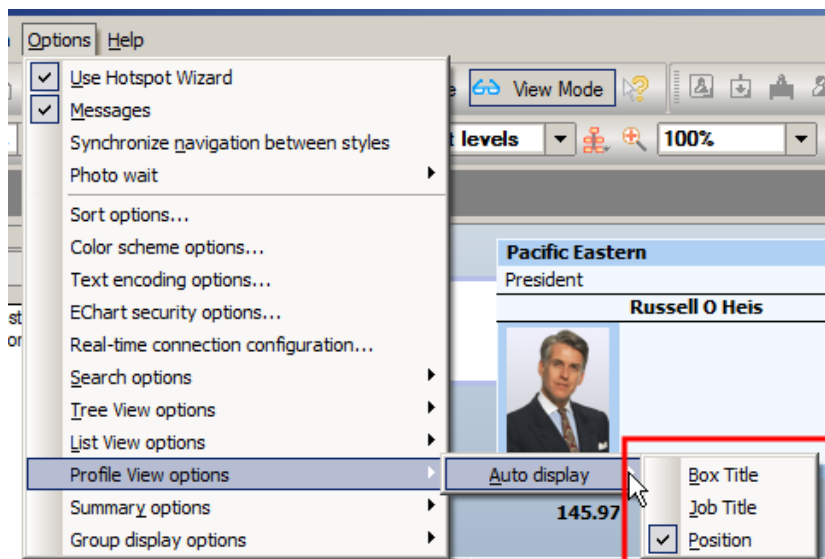
4.1 General Information

- The Profile view can help to display detailed information while keeping the chart less cluttered.
- The Profile View focuses the chart on a selected employee, position, or department. Clicking on a person's name displays data in the Profile View.
- With OrgPublisher Premier, multiple Profiles can be pinned for side-by-side viewing within the Profile View.
- Using the Profile View to display information such as telephone numbers, Job titles, office locations, salaries, job descriptions, departments, mission statements, and photos can eliminate the need for Hotspots to HTML documents that display this information.
- Custom Fields designated as an Email type are "hot" when displayed in the Profile View. Clicking on the field launches an email to the selected person.
- Headings are available to categorize data for easier reading.

4.2 Profile View Defaults

If the Profile View is open as a viewer of the published chart navigates, the Position (Person) data for the top box in the chart will display by default in the Profile View. To change the default:

1. Click on Options, and then click on Profile View options.
2. Move the mouse over to the arrow after Auto display.
3. Click to select the preferred default display option when navigating within a chart.



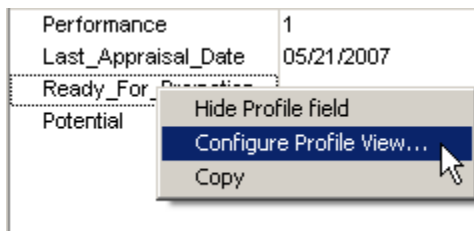
4.3 Profile View Show/Hide Fields

Custom fields you wish to display in the Profile View for the Person, Job, or Box Title are easily assigned using the Show/Hide fields window.

1. Turn on the Profile View.



2. Right click on any displayed row.
3. Select Configure Profile View . . .



4. Select the Person, Job, or Box tab to setup the Profile View for each section of the chart box.



5. Click to place a checkmark selecting the fields to display, or click to remove a checkmark for fields you do not wish to display.



6. Click to select another tab to modify display fields.
7. Once all selections are made, click OK.

4.4 Profile View Headings

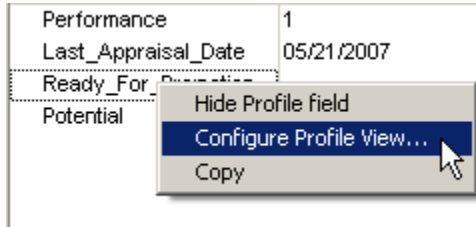
The Profile View has a heading option to categorize related custom fields for easier viewing.

Please Note:

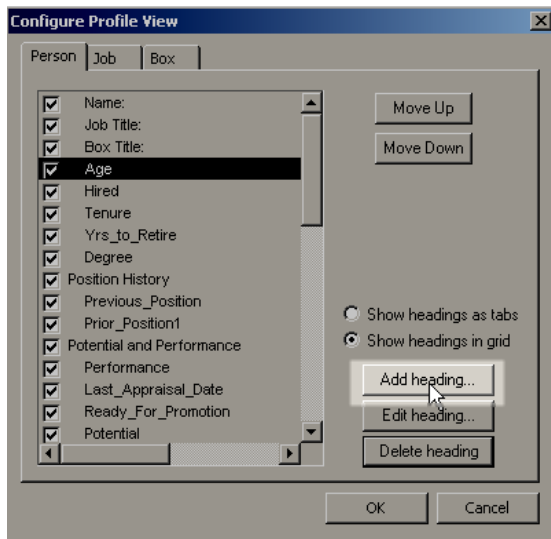
- If the security settings restrict a user from seeing all the fields under a heading, the heading will not display.
- Headings have a limit of 255 characters.

4.4.1 Add a Heading

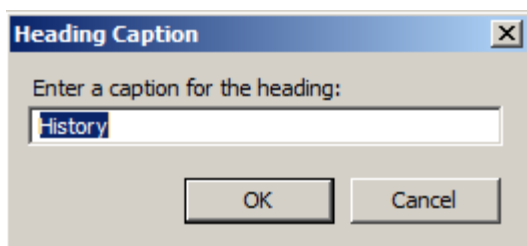
1. Open the Profile View.
2. Right click on any row.
3. Select Show/Hide Fields.



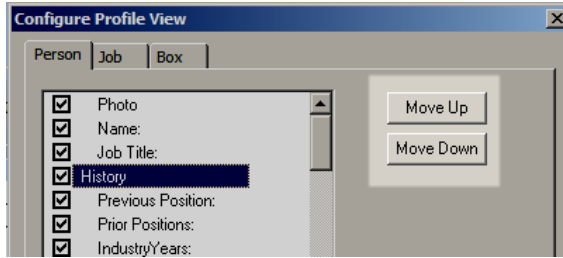
4. Select the tab for the assigned Custom Fields. In this example, the Person tab is selected. All of the Custom Fields assigned to the Person/Name are available. Move the fields up and down to order them into categories. Select the first field in the first category. The Age field is selected. Click Add heading.



5. Type in the heading caption, and click on OK.

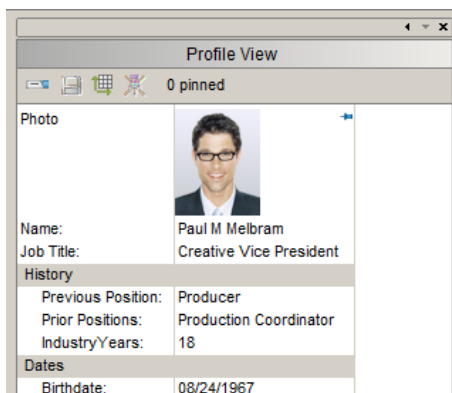


6. Select the custom heading and Move Up or Move Down button to arrange as needed. You can also add additional headings, edit, and delete them if you wish.



Tip: To instantly insert a Heading above a specific field, select the field, and then click Add heading. The Heading is inserted above the selected field.

7. Click on OK when you have completed your additions and movements.
8. You will see your modifications in the Profile View

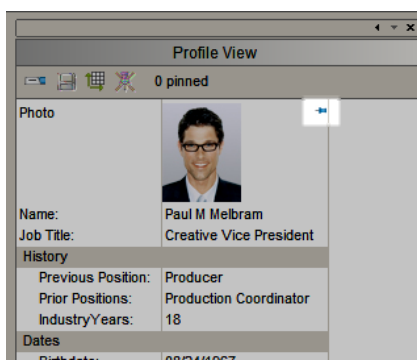


4.5 Side by Side Profile View - OrgPublisher Premier

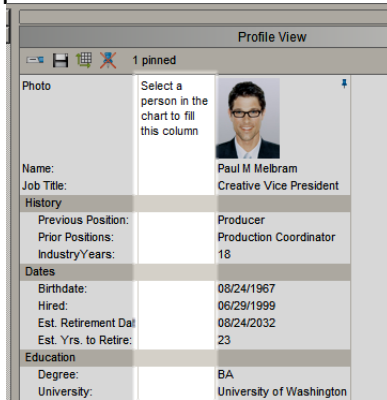
Side by Side Profile View allows the viewer to look at multiple profiles at the same time. Each profile contains a pin that "holds the profile" in the view. This feature is available in charts published as PluginX and EChart Rich Client.

4.5.1 Pinning Profiles

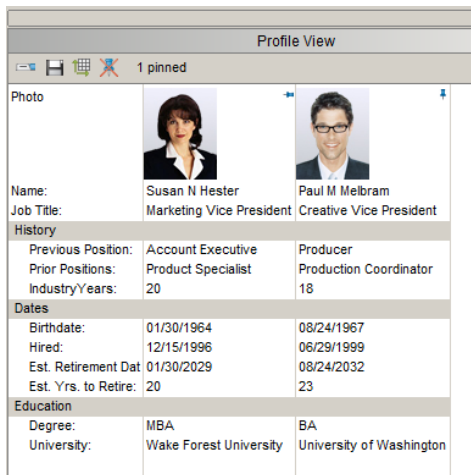
1. Open the Profile View.
2. The Profile for the top box will display.
3. Select the preferred Profile.
4. Click the pin button to anchor the Profile.



- When the user clicks on the pin, the profile is anchored and moved to the right. A placeholder is created for the next profile to display on the left.



- Click on another person's name, job title, or box title (depending on the data you are profiling) to populate the placeholder with the next person's information.

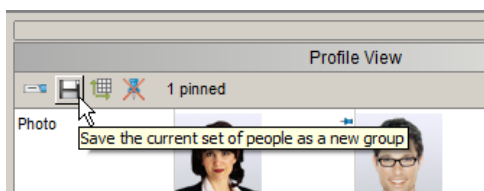


- If the added Profile is pinned, both pinned profiles move right and an additional placeholder appears.

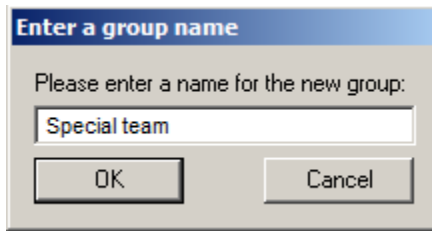
4.5.2 Create a Group from Pinned Results

Groups can be created from the displayed Profiles. To read more about Groups, please refer to the Search and Group manual.

- Click on the Create Group button, and then click on Save As.

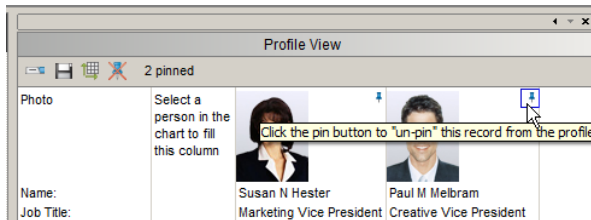


- The Enter a group name window opens. Type in the Group Name and click OK.

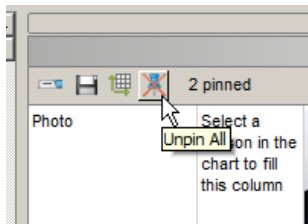


4.5.3 Unpin Profile Views

To unpin one of the Pinned Profiles, click on the Pin button. The Profile is removed from the View.



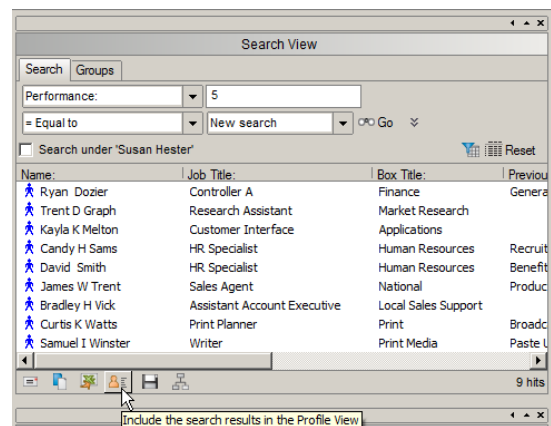
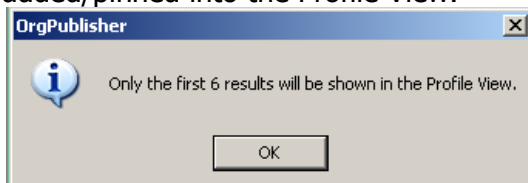
To unpin all of the Pinned Profiles, click the Unpin all button.



4.5.4 Auto Pin Search or Group Results

A user can create a new search result or use the search result from an existing group to automatically pin profiles (up to 6). To read more about Searching, please review the Search and Group manual.

- In the Search View window, obtain search results and then click on Include the Search Results in the Profile View button.
- In this example the search provided 9 hits (bottom right corner of the Search View window). Only the first 6 results will be added/pinned into the Profile View.



4.5.5 Pinning 9 Box Members

9 Box results can be used as the source for pinning Profiles. Please refer to the section on 9 Box Matrices in this manual for more details.

4.5.6 Printing Pinned Profiles

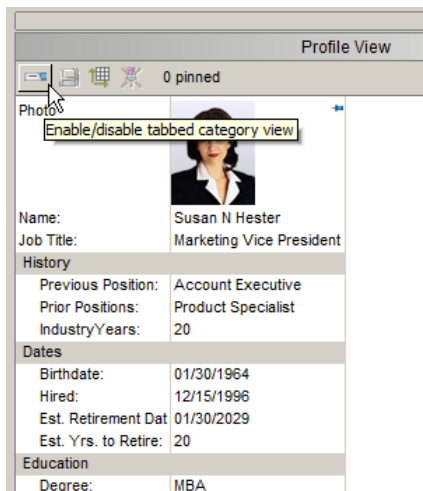
Pinned Profiles can be printed. If the Print Wizard is activated, then the user should select to print the Profile View when prompted.

4.6 Tabbed Profile View

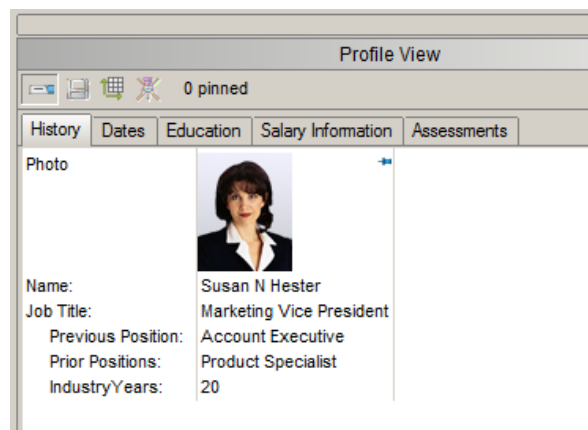
If category headings are used in the Profile View, the viewer of a published chart has the option to display all categories and data. The information can also be displayed with tabs representing each category and related data displaying on the selected tab screen.

Click the Enable/disable tabbed category view button to toggle between a tabbed and grid view.

Tabbed View disabled – Grid View

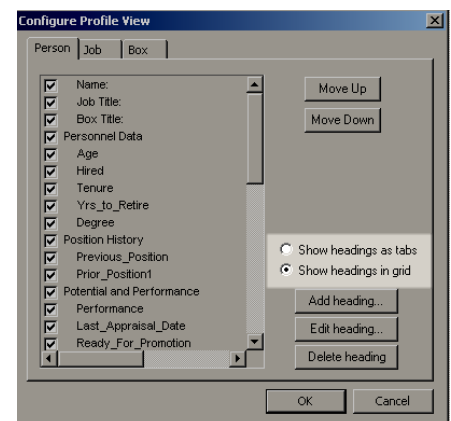


Tabbed View enabled



The chart administrator sets the default display for he published chart. This can be set with either option listed below:

- Right-click and select Configure Profile View.
- Select to show heading as tabs or in the grid.

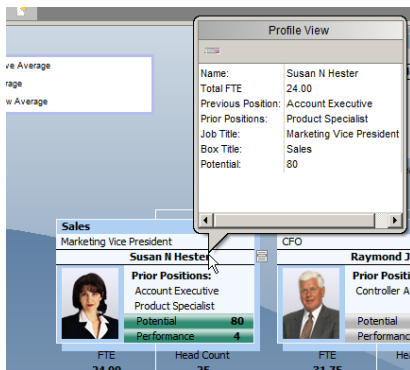


5 Hover Profile

The Hover Profile is an option that displays Profile details for the name, job title or box title, when the mouse pointer hovers over each component. This can be turned on or off for each style within the chart. By default, all new charts will have the Hover Profile on.

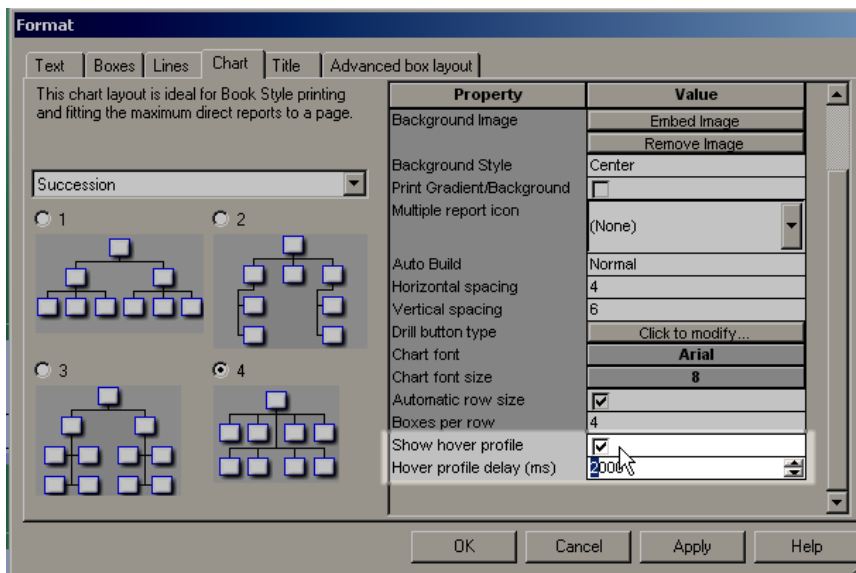
Please Note: The Hover Profile does not use the same settings as the Profile View and can be customized for each Style in the chart.

Also, if a hotspot has been attached to a name, job title or box title and the user hovers over the field containing a Hotspot the mouse pointer appears in the familiar hand shape. If the Hover Profile is activated it will display.

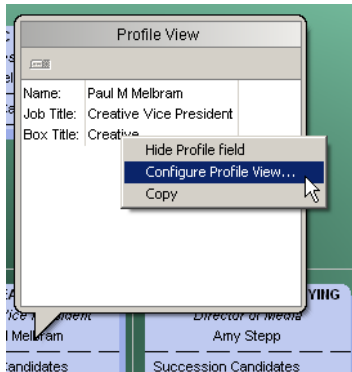


5.1 Activate the Hover Profile

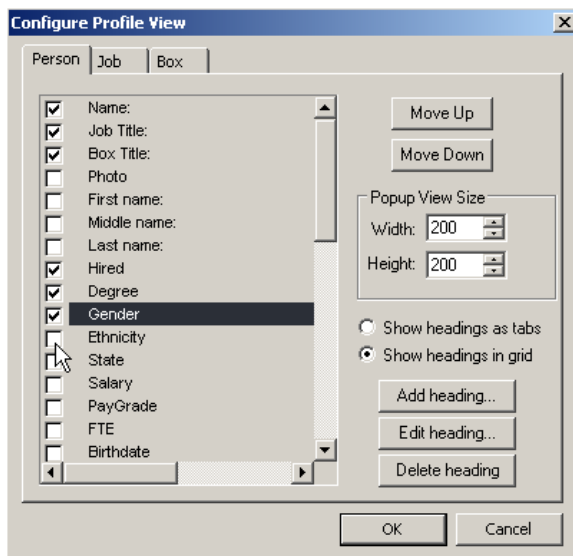
1. Select Format, then Chart.
2. Scroll down in the Value column until you see Show hover profile. If it is checked, the feature is activated for the active style.



3. Below the check mark for Show the hover profile is a number. This indicates how many milliseconds the mouse must hover before the Hover Profile appears. Increase the number as needed.
4. Click on OK to exit the Format dialog box, and return to the chart.
5. Move your mouse pointer on top of the name, job title, or box title to display the Hover Profile.
6. Move the mouse pointer into the Hover Profile box onto one of the custom fields.
7. Right click on the Custom field, and select show/hide fields.



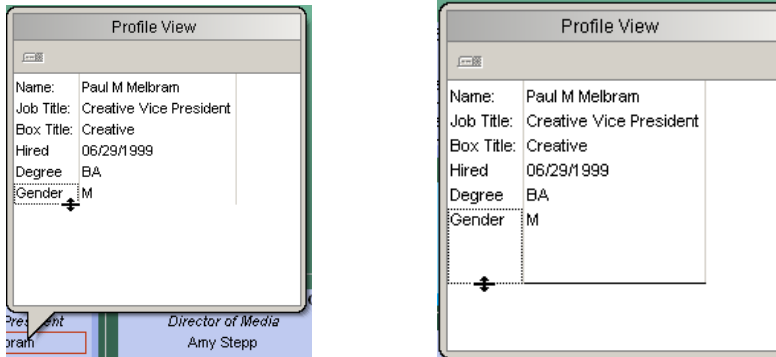
8. Click to add or remove check marks beside the custom fields and headings.
9. Move the selected custom field up or down in the list by clicking the Move Up or Move Down button.
10. Headings can be added to the Hover Profile as described in Section 8.
11. Click OK to complete.



5.2 Increase/Decrease Hover Profile Row Heights

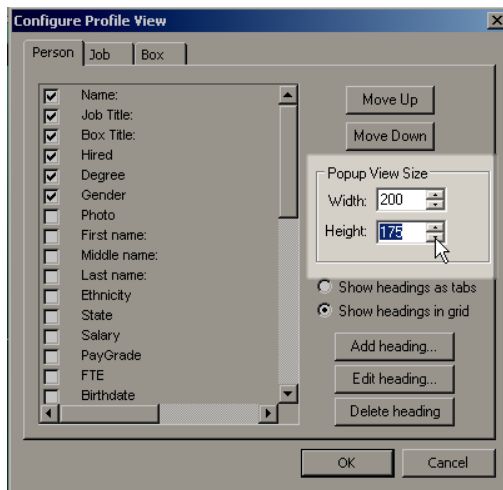
Increase or decrease the row height by placing the mouse pointer on the edge of the row. Hold the left mouse button down and drag up or down to decrease height. In the example

below, the Email row has increased in height.



5.3 Increase/Decrease Hover Profile Window

1. To adjust the width and height of the Hover Profile, right click on any field and select Show/Hide fields.
2. The height and width settings are under the Move Down button. Click to select the Width or Height number and type in the new setting. Click Ok.



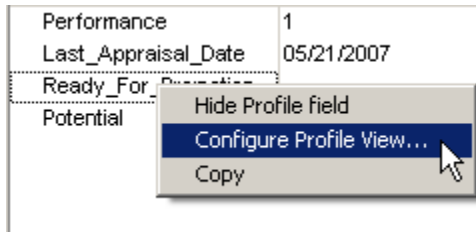
Please note: The Hover Profile will optimize the display based on screen space surrounding the chart box. The example below shows the Hover Profile on the top left side of the chart box. The Hover Profile's position may change based on what is currently on screen.

5.4 Modifying Contents in the Hover Profile

As with the Profile View, the chart administrator can modify the fields displayed, the field order display, and add headings. The Profile View can be customized for each Style within your chart.

1. Activate the Hover Profile as noted above.
2. Place the mouse pointer over the name in a chart box.

3. Move the mouse pointer over a row in the Hover Profile.
4. Right click on any displayed row.
5. Select Configure Profile View . . .



6. Select the Person, Job, or Box tab to setup the Profile View for that section of the chart box.



7. Click to place a checkmark selecting the fields to display or click to remove a checkmark for fields you do not wish to display.



8. Click to select another tab to modify display fields.
9. Once all selections are made, click OK.

5.5 Hover Profile Headings

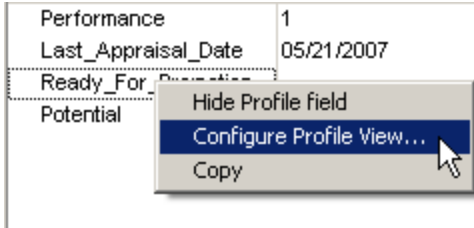
The Hover Profile View has a heading option to categorize related custom fields for easier viewing.

Please Note:

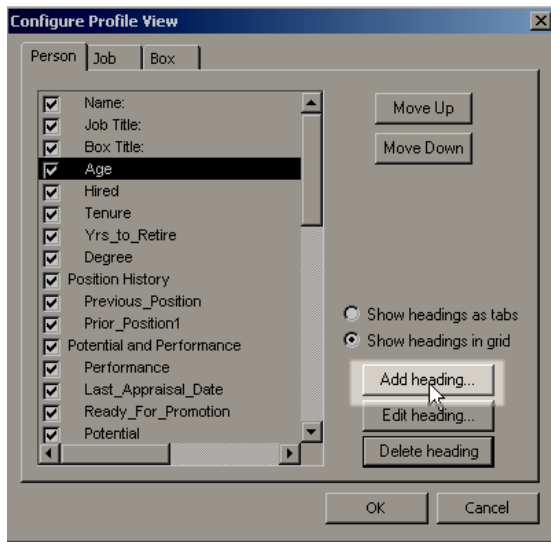
- If the security settings restrict a user from seeing all the fields under a heading, the heading will not display.
- Headings have a limit of 255 characters.

5.5.1 Add a Heading

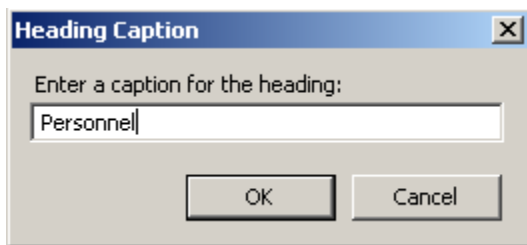
1. Activate the Hover Profile.
2. Right click on any row.
3. Select Show/Hide Fields.



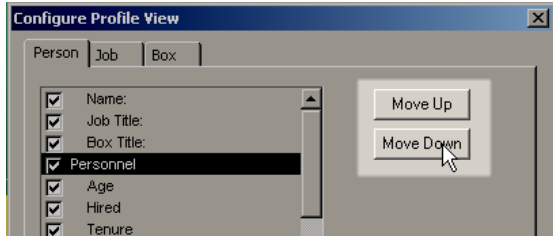
4. Select the tab for the assigned Custom Fields. In this example, the Person tab is selected. All of the Custom Fields assigned to the Person/Name are available. Move the fields up and down to order them into categories. Select the first field in the first category. The Age field is selected. Click Add heading.



5. Type in the heading caption, and click on OK.

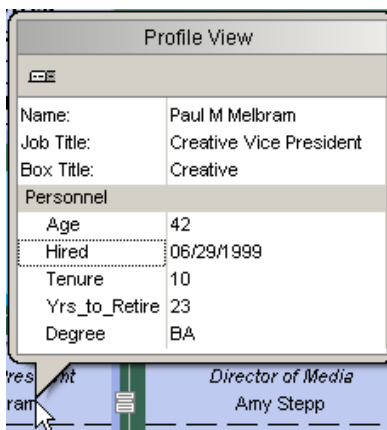


6. Select the custom heading and use the Move Up or Move Down buttons to position it as needed. You can also add additional headings, edit, and delete headings if you wish.



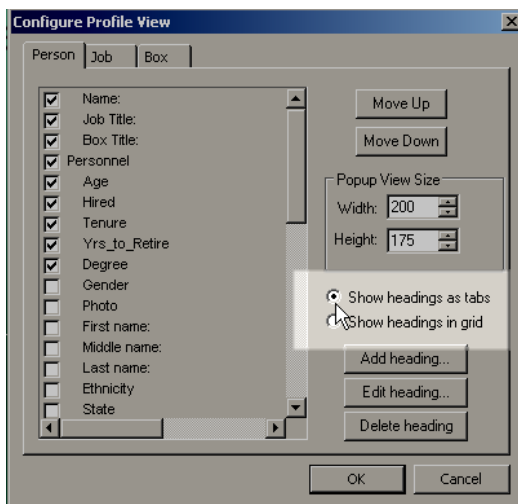
Tip: To instantly insert a Heading above a specific field, select the field and click Add heading. The Heading is inserted above the selected field.

7. Click on OK when you have completed your additions and movements.
8. You will see your modifications in the Hover Profile.



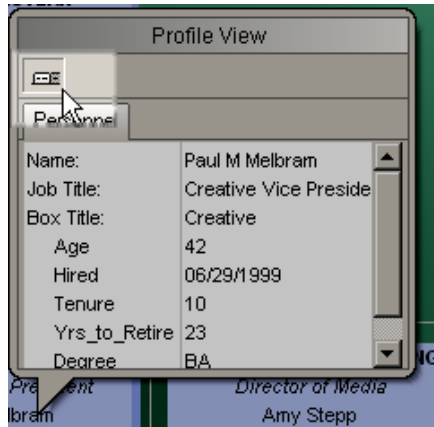
5.6 Tabbed Hover Profile View

The Hover Profile can also be configured to display in a tabbed or grid layout. The chart administrator sets the default display option in the Configure Profile View dialog box.



The viewer of the Hover Profile in a published chart can toggle between tabbed and grid views using the Enable/disable tabbed category view button.

Tabbed View



Grid View

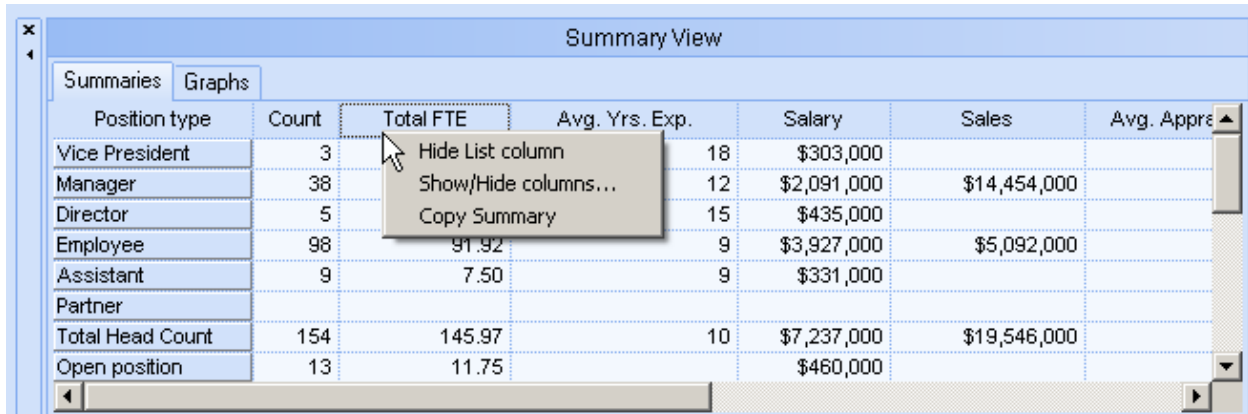


6 Summary View

OrgPublisher's Summary View feature displays head counts by Position Type and Groups. If Summary Fields of numeric Custom Fields are created, these will also display in the Summary View. In addition, the Summary View contains a Graphs tab for displaying pie, horizontal and vertical bar charts. Summary Views can be customized for each Style in the organization chart.

6.1 General Information

- Summary fields are added with the Summary Wizard or from the Custom Field Properties dialog. (More information on creating Summary fields is available in the Summary field manual.)
- The Summary View shows default head counts (see the example below).
- To hide a row, select the row, right click in the row area, and select Show/Hide Rows or Hide Summary Row.
- To hide a column, right click on the column heading, and select Show/Hide Column or Hide List Column.

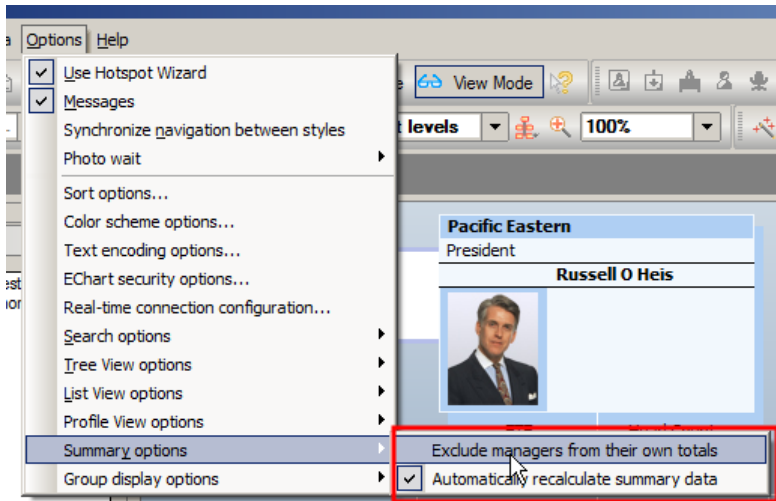


Position type	Count	Total FTE	Avg. Yrs. Exp.	Salary	Sales	Avg. Appra
Vice President	3		18	\$303,000		
Manager	38		12	\$2,091,000	\$14,454,000	
Director	5		15	\$435,000		
Employee	98	91.92	9	\$3,927,000	\$5,092,000	
Assistant	9	7.50	9	\$331,000		
Partner						
Total Head Count	154	145.97	10	\$7,237,000	\$19,546,000	
Open position	13	11.75		\$460,000		

6.2 Summary View Defaults

There are 2 default options to define when using the Summary View:

- Exclude managers from their own totals:
 - When head counts or any summary field is generated and this option is checked, the manager will be included in the total. For example, there is 1 manager and 4 direct reports. If this option is checked or enabled, the head count will be 4. However, if it is not selected with a checkmark, the head count will be 5.
- Automatically recalculate summary data:
 - Each time you edit the Custom Fields Properties, the summary fields must recalculate. In large charts, this can contribute to slower response times when returning to the chart for formatting. You may wish to turn this off until you are finished working on Summary Fields and are ready to see the actual results.



6.3 Summary View Formatting Columns

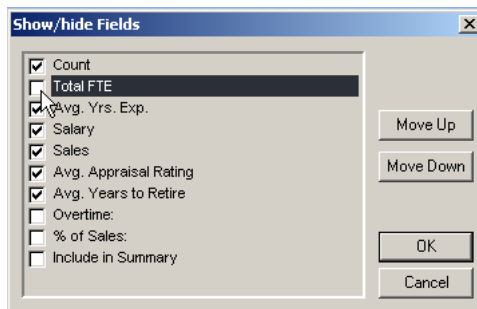
1. Select the Summary View button.



2. The Summary View is displayed in the lower portion of the screen.
3. To hide columns, right click on a column heading. A list of options is displayed. Click to select the option you wish to use.

Position type	Count	Total FTE	Avg. Yrs. Exp.
Vice President	3		18
Manager	38		12
Director	5		15
Employee	98	91.92	9
Assistant	9	7.50	9

4. In this sample Show/Hide columns was selected. Select the column that is not to be displayed, then click OK. In this example, Total FTE will not be displayed.



5. The result, shown below, is that the Total FTE column no longer appears in the Summary View..

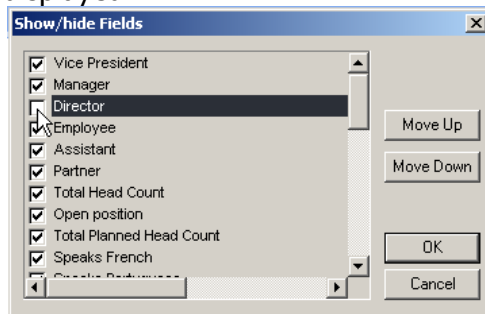
Summary View					
Position type		Count	Avg. Yrs. Exp.	Salary	Sales
Vice President		3	18	\$303,000	
Manager		38	12	\$2,091,000	\$14,4
Director		5	15	\$435,000	
Employee		98	9	\$3,927,000	\$5,0
Assistant		9	9	\$331,000	
Partner					
Total Head Count		154	10	\$7,237,000	\$19,5
Open position		13		\$460,000	

6.4 Formatting Rows in Summary View

By default, all Position Types and counts are shown. To hide rows, right click on a row heading. A list of options is displayed. Click to select the option to use.

Summary				
Position type		Count	Avg. Yrs. Exp.	Salary
Vice President		3	18	\$303
Manager		38	12	\$2,091
Director		5	15	\$435
Employee		98	9	\$3,927
Assistant		9	9	\$331
Partner				
Total Head Count		154	10	\$7,237
Open position		13		\$460

1. In this sample Show/Hide rows was selected. Select the rows that are not to be displayed, then click OK. In this example the Director Position Type will no longer be displayed.



2. The results below show that the Director Position type is no longer appearing within the Summary View.

Position type	Count	Avg. Yrs. Exp.
Vice President	3	18
Manager	38	12
Employee	98	9
Assistant	9	9
Partner		
Total Head Count	154	10
Open position	13	
Total Planned Head	167	

- Group totals can be displayed in the Summary View. (Please review the Search and Group manual for information on creating Groups.)
- As you drill down into the organization, these numbers change to show the totals for the current top of chart down. The example below shows the counts under a Vice President's organization.

Position type	Count	Total FTE	Avg. Y.
Vice President	1	1.00	
Manager	7	6.75	
Employee	37	34.10	
Assistant			
Partner			
Total Head Count	48	44.85	
Open position	2	1.50	
Total Planned Head	50		

6.5 Graphs

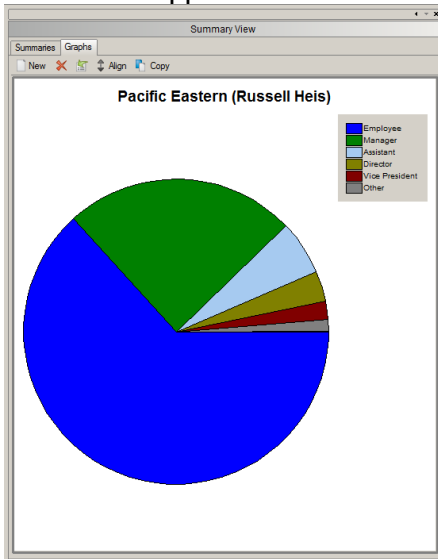
Workforce Analysis Graphs use Summary View data to create graphs visually depicting your organization. There are 3 charting options: Pie, Horizontal, and Vertical bar charts. Just as Summary View data changes as the user drills up and down the chart, graph results will also change.

- Open the Summary View.
- Select the Graphs tab.

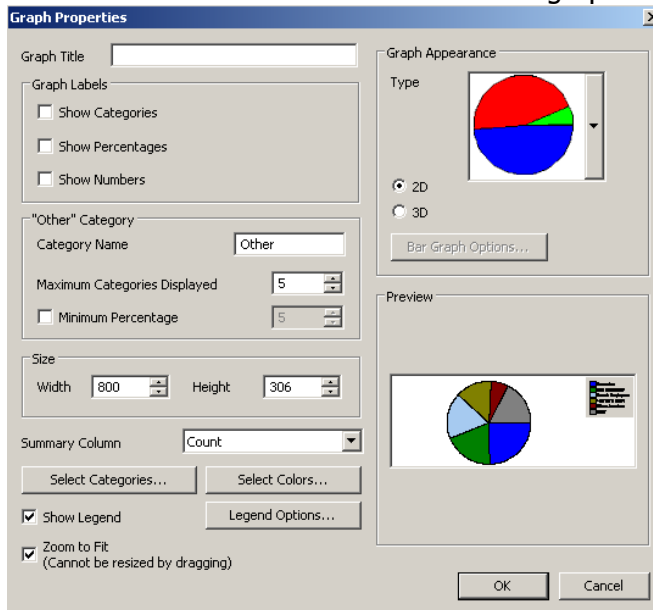
Position type	Include in Summary	Count
Vice President	Yes	3
Manager	Yes	38
Director	Yes	5
Employee	Yes	98
Assistant	Yes	9
Contractor	No	

- Maximize the docked window.

- A bar chart appears with all Position Types (and counts) displayed in the Summary View.



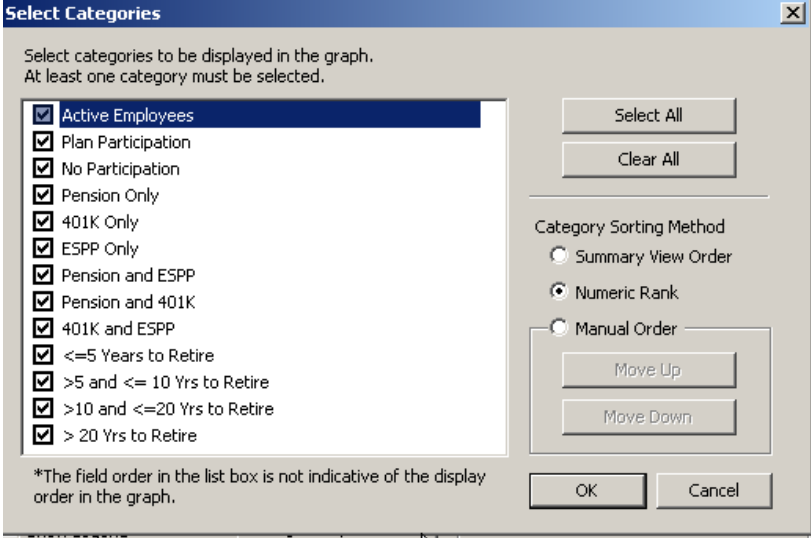
- Select the New button or double click the graph to launch the Graph Properties window.


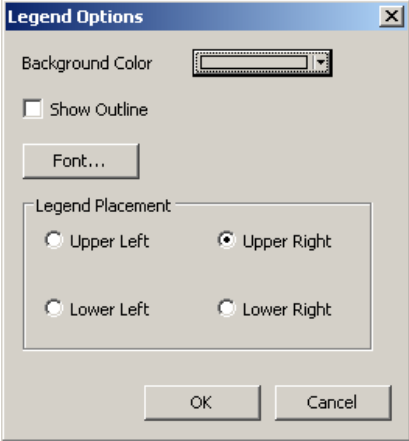


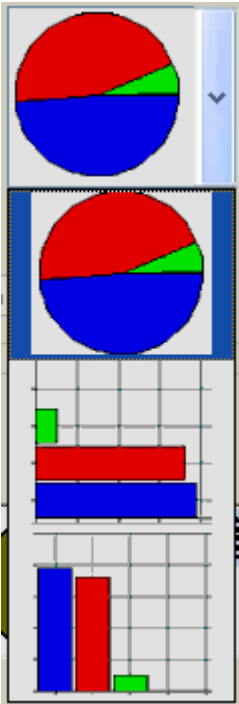
- Modify the properties, and click OK to complete.

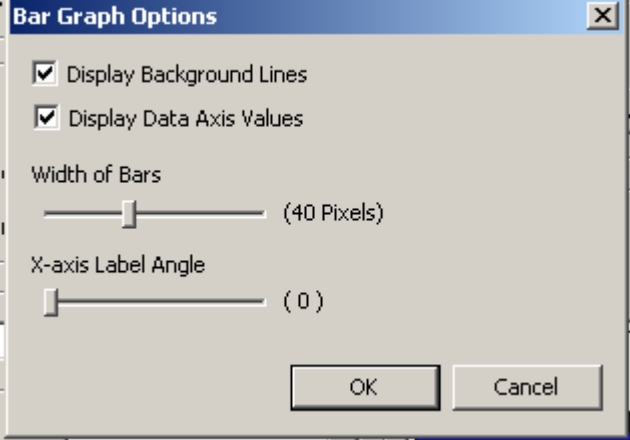
6.5.1 Graph Properties Options

Option	Description
Graph Title	Text that appears above the graph
Graph Labels	<p>3 options are available for display on the graph:</p> <p><i>Show Categories</i> – Displays the Position Type or Group name for each chart element</p> <p><i>Show Percentages</i> – Displays the percentage each chart element represents compared to the whole</p> <p><i>Show Numbers</i> – Displays the actual count for each chart element</p>
Other Category	<p><i>Category Name</i> – Text area to modify the label used for the “Other” element within the graph. This label must contain at least 1 character. The default is Other.</p> <p><i>Maximum Categories</i> – The maximum elements from the Summary View you want to display. This is represented with numbers and can be between 1 and 12. The default is 5.</p> <p><i>Minimum Percentage</i> – Minimum percentage required for an independent element. Any element that falls below the percentage will be accumulated in an “Other” element in the graph. The default is off.</p> <p>Please Note: The Other category + the independent elements are a total of 12 elements from the Summary View.</p>
Size	<p><i>Width</i> – Allows you to raise and lower the width of the graph. The max value is 3000, and the min value is 100.</p> <p><i>Height</i> – Allows you to raise and lower the height of the graph. The max value is 3000 and the min value is 100.</p> <p>Please Note: When there are multiple graphs and they are aligned vertically all graphs will be resized to match the widest and tallest graph.</p>

Option	Description
<p>Summary Column</p>	<p>Lists the summary columns available in the Summary View. This is the column used for charting and is the number displayed when Chart Numbers is selected. The default is the first column in the summary view.</p>
<p>Select Categories...</p>	<p>Invokes the Select Categories modal dialog. A list of all items in the Summary View is presented. At least 1 category (element) and no more than 12 should be selected.</p> 

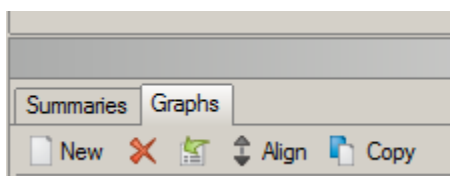
Option	Description
<p>Select Colors...</p>	<p>Invokes the Select Colors dialog.</p> 
<p>Show Legend</p>	<p>When active (with a checkmark) a legend displays with the graph. This is enabled by default.</p> <p><i>Legend Options</i> – The legend options is active when Show Legend is selected. This allows you to control background color, display a border around the legend, and modify font face and placement within the graph area.</p> 
<p>Zoom to Fit</p>	<p>When this is checked and only one chart exists, then the chart will expand/shrink to fill the entire graph view. When there are multiple charts, the chart will expand horizontally when</p>



Option	Description
	<p>the charts are vertically aligned and expand vertically when horizontally aligned.</p> <p>If this option is checked, you cannot resize by dragging.</p>
<p>Graph Appearance Type</p>	<p>Select the drop down arrow to choose the type of graph to be drawn – bar, horizontal or vertical. The default is a pie chart.</p>  <p><i>Pie Chart Options</i> – When a pie chart is selected, the 2D (2 dimensional) and 3D (3 dimensional) buttons are available. The default selection is 2D.</p> <p><i>Horizontal and Vertical Bar Chart Options</i> – When a horizontal or vertical bar chart is selected, the Bar Graph Options button is available. Click this button to modify the display of the bar chart.</p>





Option	Description
	 <p>Bar Graph Scaling Note: The maximum value displayed on the data axis is determined by adding 5% to the category with the highest value. An adjustment is made to the value to provide open space between the highest value and the end of the graph.</p>
<p>Preview</p>	<p>The Preview area reflects currently selected options.</p> <p>Please note: This is a “canned” sample rather than a preview of your current graph. All chart attributes may not be demonstrated in this view.</p>

6.5.2 Graph Tab Toolbar Buttons

When the Graphs tab is selected, there are several buttons available. All buttons are highlighted when a graph is selected (single click in the graph area). If a graph is not selected, only the New and Align buttons are available.



Option	Description
<p>New </p>	<p>Creates a new graph. Double click on the new graph to modify the attributes (detailed in previous section).</p>
<p>Delete </p>	<p>Deletes the selected graph and asks for a confirmation.</p>

Properties 	Launches the Graph Properties window for the selected graph (detailed in previous section).
Align  	When there are multiple graphs, they are aligned vertically or horizontally. This button will toggle the alignment.
Copy 	Copy the selected graph to the clipboard.

6.5.3 Printing Graphs

Graphs are available for printing when the Print Wizard is enabled. To print a graph, open the Summary View, and make the Graph View the active view. Each graph will print one to a page.

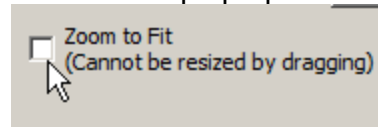
6.5.4 Graphs in Published Charts

Graphs are displayable when charts are published as PluginX and EChart. Thin Client charts will display the graphs as GIFs below the Summary View. Graph properties cannot be modified in PluginX or EChart Rich Client charts, but may be copied to the clipboard. Graphs are not displayed when publishing as PDF, HTML or when sending output to PowerPoint.

6.5.5 Resizing Graphs

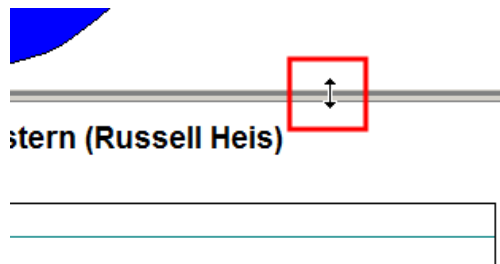
Graphs may be made narrower or wider by changing the width in the Graph properties window.

Please note: The graph must not be set to Zoom to Fit.

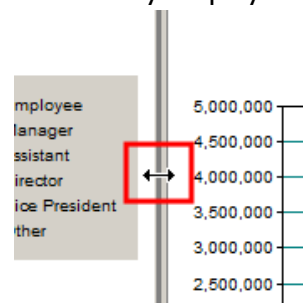


When horizontally displayed, width can be controlled by dragging the graph's right side. When vertically displayed, height can be controlled by dragging the bottom edge of the graph.

Vertically Displayed Graphs



Horizontally Displayed Graphs



7 9 Box Matrices – OrgPublisher Premier

What is it?

The matrix is used to evaluate an organization's talent pool. Here's the basic format: The X-axis (horizontal line) of 3 boxes assesses performance, and the Y-axis of 3 boxes (vertical line) assesses potential. A combination of Y and X axis makes up the box within the grid where the employee is placed. The top-rightmost box shows to High Performance/High Potential employees, while the bottom-leftmost box contains- Low Performance/Low Potential.

Why use it?

1. Assess any population of leaders on two important dimensions
2. Facilitates a dialog amongst the senior leadership team to calibrate their expectations and ratings
3. With a good open debate, the multiple perspectives provide for a much more accurate assessment (vs. one person's opinion)
4. The process can facilitate a shared sense of ownership for the organization's talent pool
5. Easily identify development needs and transition to development planning

Taken from <http://greatleadershipbydan.blogspot.com>


<http://greatleadershipbydan.blogspot.com/2007/11/using-performance-and-potential-matrix.html>

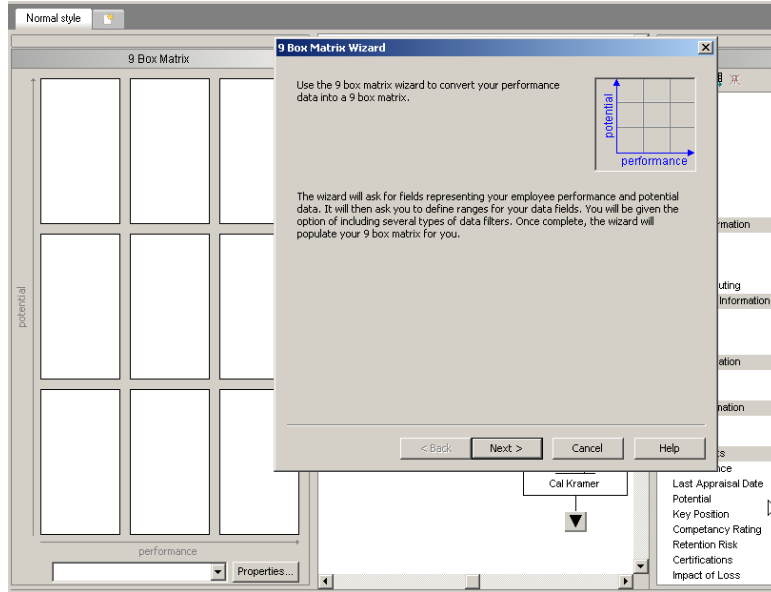
7.1 Creating a 9 Box Matrix - Chart Administrator and Planning Chart Users

9 Box matrices are available from within OrgPublisher, charts published as PluginX, EChart and OrgPlan charts. It requires 2 fields of data to create the 9 Box matrix. Typically, these would be a field indicating performance level and a field indicating potential. These fields must be **numeric**.

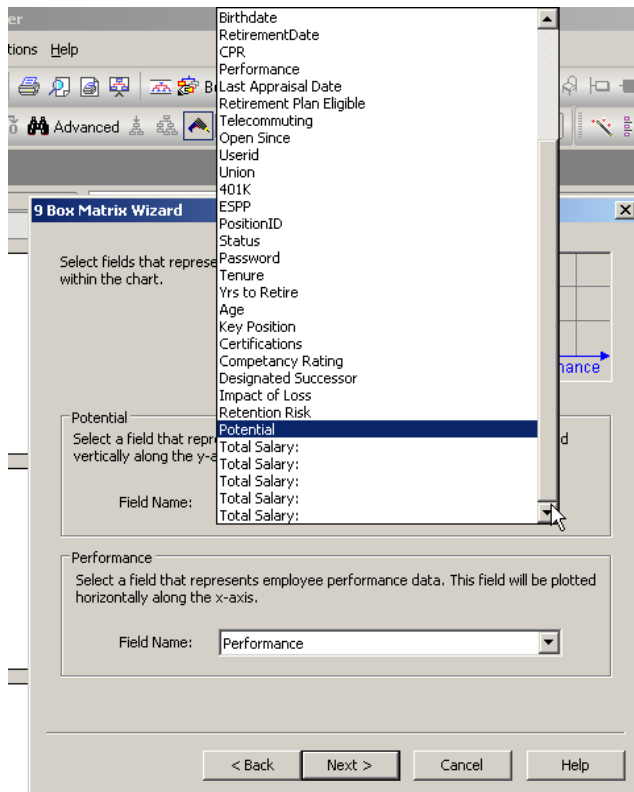
Please note: The chart administrator defines the fields used for the 9 Box matrix within a published chart. Chart planners determine the fields used in a planning chart.

To create a 9 Box matrix, follow these steps:

1. Click the 9 Box button. 
2. If this is the first time you have invoked 9 Box Matrix, the 9 Box Matrix View will open and the Wizard will begin. Click Next.



3. On the next screen, the Potential and Performance field selection is available. If you have fields labeled as Potential and Performance, OrgPublisher will select these automatically. If not, click the drop down arrow for each field and select the desired field for use.



4. Click Next and type in the values that place the employees into the Low, Average, and High range.

Before

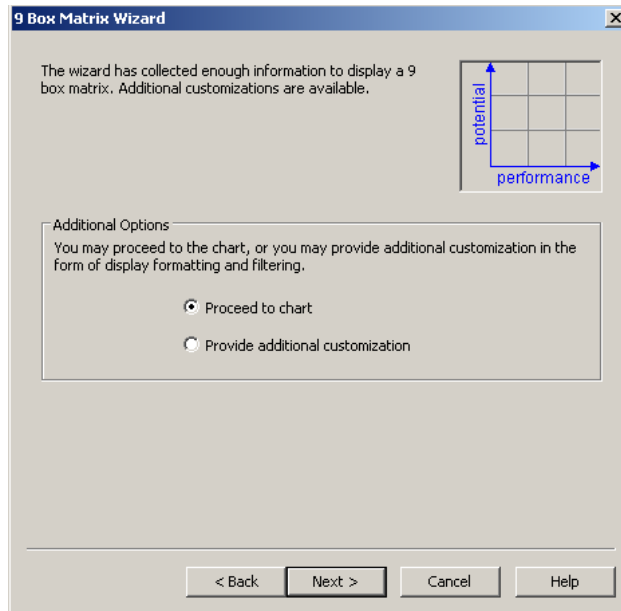
Values are set - Range Summary is updated

When the Enable High Limit and Enable Low Limit are selected, this allows you to indicate a minimum number to start (Low Limit) or maximum number to end (High Limit). If it is not selected, any records with a value below 50 or above 80 (in this example) will be placed in the appropriate row.

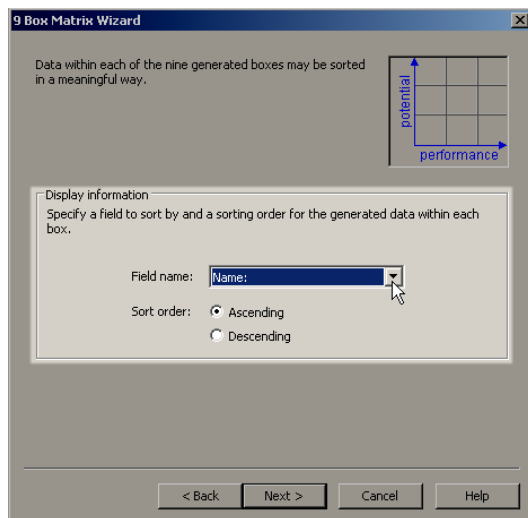
Please note: When the low, high, or both low and high are set, records that fall outside of this range will not appear in the 9 Box matrix.

- Click Next and provide the Low, Average, and High ranges for the Performance data field.

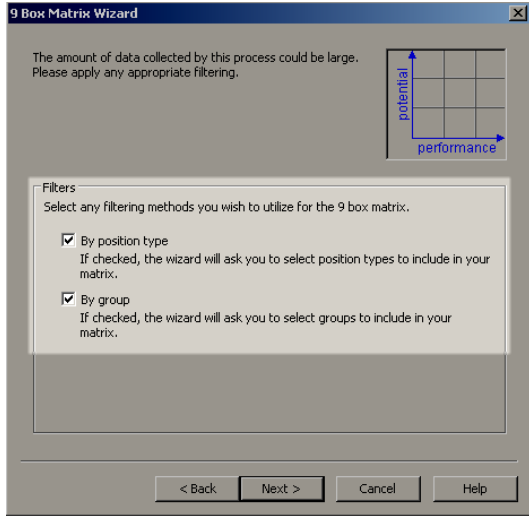
- Click Next. At this point, you may choose to go to the chart to see all charted records positioned in the 9 Box or provide additional formatting.



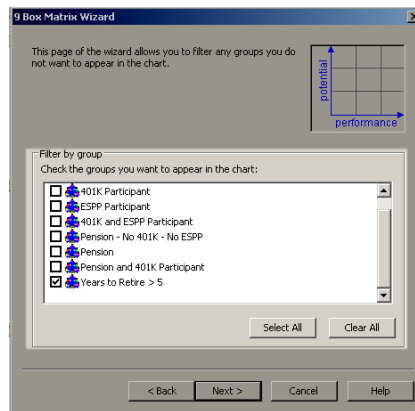
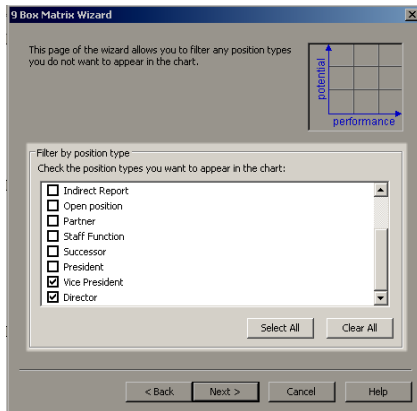
7. If additional customization is selected, the first option is to choose the sorting method of the data within each box. Click the drop down to change the sort field. Select an Ascending or Descending sort order. Click Next to continue.



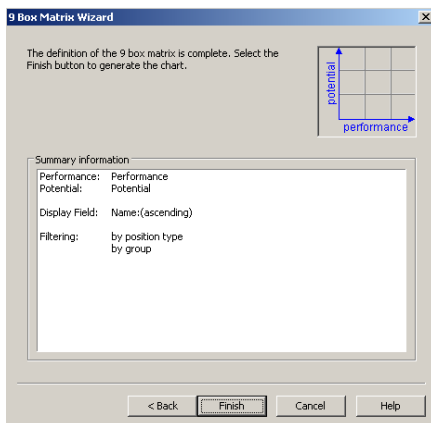
8. The next screen offers you filtering options. Use one or both of the options offered. If you wish to filter by Position Type or Group, the wizard will continue to additional screens so you can select Position Types or Groups to include in the filtering.



9. The following screenshots shown are for the By Position Type selection and By Group selection. Options will vary based on custom Position Types you have created for the chart and your own Groups.



10. Click Next. You will see a summary of your 9 Box matrix selections. Click Finish to populate the 9 Box matrix.



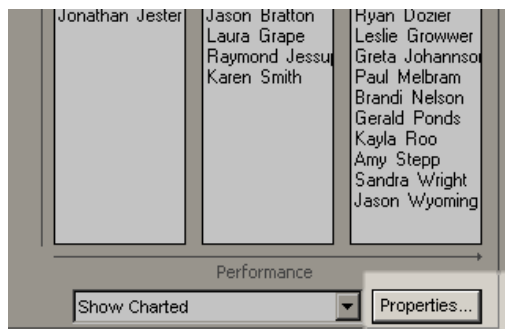
7.2 9 Box Matrix Created from Pinned Profiles

The 9 Box Matrix button is available with pinned profiles. The chart administrator must have set the values in the 9 Box Data Wizard for results to display in a PluginX or EChart Rich Client chart.

7.3 Modifying 9 Box Matrix Results – Chart Administrators

You can modify the results that display within your 9 Box matrix using the Properties button.

1. If not already done, activate the 9 Box View.
2. Click on the Properties button in the 9 Box matrix.



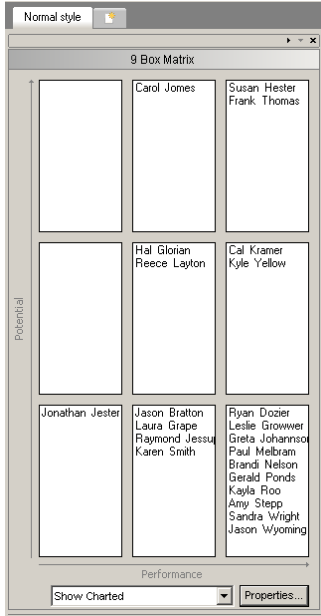
3. The chart administrator will be taken through the complete 9 Box wizard. A viewer of the published chart will be offered the customization portion of the wizard to modify the sort and filtering.

7.4 9 Box Filtering by Levels Displayed

Another method to filter results in the 9 Box View is to reduce the number of levels displayed in the chart.

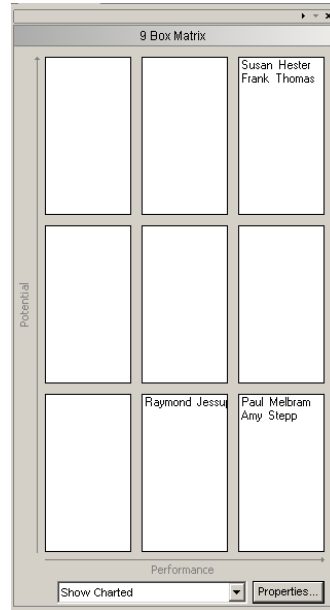
Results with 3 Levels displayed

President is the top of chart



Results with 2 Levels displayed

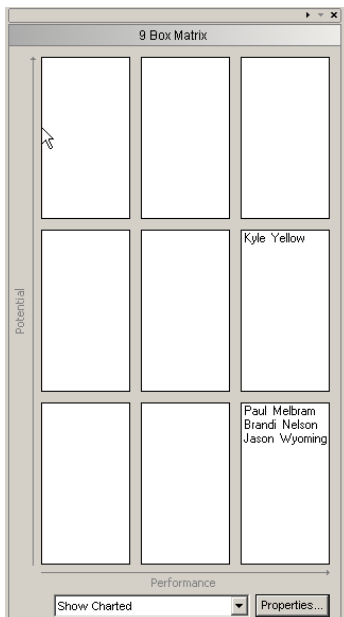
President is the top of chart



Drilling up and down the organization chart when 9 Box Results are displayed will also change the results.

Drilling 2 Levels

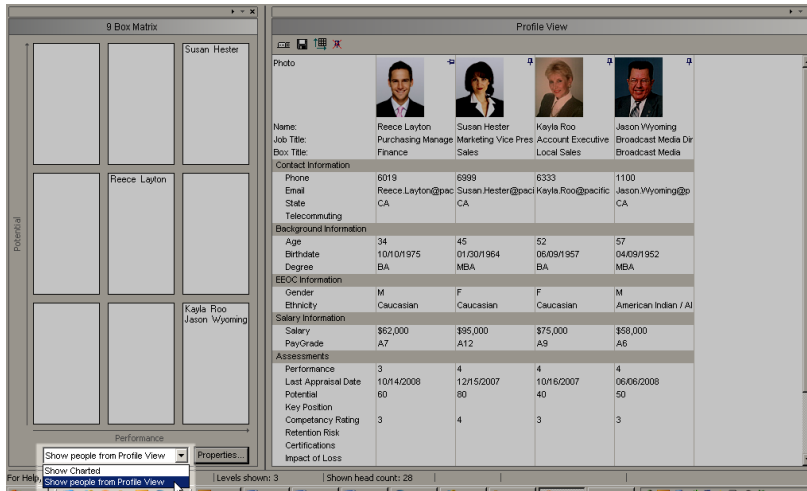
Vice President is the top of chart



7.5 9 Box Matrix Results from Pinned Profiles

By default, charted boxes are considered for display in the 9 Box results. The filtering by Position Type and/or Group will reduce the results.

The user can also plot the 9 Box results for the records they have pinned in the Profile View. Click the Show drop down and select the option for filtering the displayed results. In this example the 4 records pinned in the Profile View are also plotted in the 9 Box Matrix.



7.6 Display Pinned Profiles in the 9 Box View

Viewers can also place pinned profiles in the 9 Box View from the Profile View. Click the 9 Box button in the Profile View. The 9 Box is launched (if not already opened) or data is updated (if opened) to reflect only pinned Profiles.



Please note: The 9 Box View will not launch if the chart administrator has not formatted the Potential and Performance information. Please see the Publishing manual to determine how to eliminate the display of the 9 Box view button.

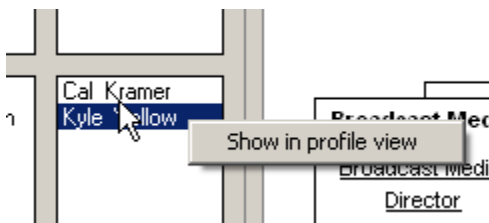
7.7 Pin Profiles from 9 Box View

Viewers may want to see more details about individuals in the 9 Box View. Select a name in the 9 Box View. The Profile will appear in the Profile View (if open).

Potential	High Potential	High Performer
	Carol Jones	Susan Hester Frank Thomas
	Hal Glorian Reece Layton	Cal Kramer Kyle Yellow
	Jonathan Jester	Jason Bratton Laura Grape Raymond Jessu Karen Smith
		Ryan Dozier Leslie Growwer Greta Johanson Paul Melbram Brandi Nelson Gerald Ponds Kayla Roo Amy Stepp Sandra Wright Jason Wyoming

Photo	Hal Glorian	Frank Thomas	Kyle Yellow
Name:	Hal Glorian	Frank Thomas	Kyle Yellow
Job Title:	Payroll Manager	HR Vice President	Creative Director
Box Title:	Payroll	Human Resources	High Tech Creative
Contact Information			
Phone	6555	8000	1188
Email	Hal.Glorian@pacific	Frank.Thomas@pac	Kyle.Yellow@pacific
State	CA	MA	CA
Telecommuting			
Background Information			
Age	36	53	41
Birthdate	09/09/1973	06/02/1956	04/30/1968
Degree	BA	MS	BA
EEOC Information			
Gender	M	M	M
Ethnicity	Caucasian	Asian / Pacific Islan	Caucasian
Salary Information			
Salary	\$35,000	\$109,000	\$75,000
PayGrade	A3	A11	A9
Assessments			
Performance	3	4	4
Last Appraisal Date	05/15/2008	12/15/2007	10/19/2007
Potential	70	80	60
Key Position			
Competency Rating	2	4	4
Retention Risk			
Certifications			
Impact of Loss			

If the Profile View is not open, then the Viewer can right click on the desired name and select Show in Profile View. The Profile View will be opened. The person currently at the top of chart and the person selected in the 9 Box are displayed in the Profile View. The Viewer can pin the desired records and continue selecting from the Profile View.




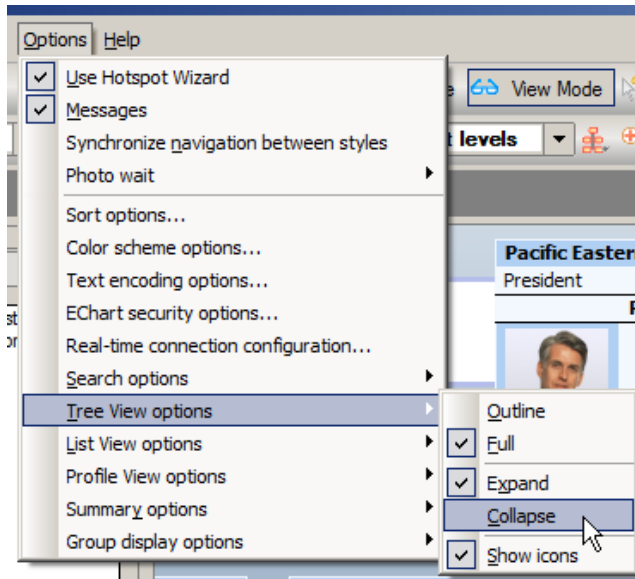
7.7.1 Printing the 9 Box Matrix

The 9 Box matrix will print if the Printing Wizard has been activated. The user will be prompted to print the chart or the 9 Box View. If the 9 Box View is maximized, the user is not prompted, and the 9 Box output is automatically printed.

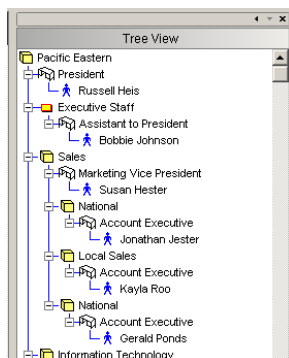
8 Tree View

OrgPublisher's Tree View displays chart data in an outline format. You can modify the look of the Tree View to give you a more or less detailed outline. You can also use icons in the outline.

1. Click on the Tree View button. 
2. Select Options from the menu bar, then Tree View options from the pull-down list. The options list appears.



3. Check-marked items are the active features in the outline. Click on an option name to select it. The viewing options are listed below.
 - a. **Outline/Expand**: displays box titles for each box in the chart.
 - b. **Outline/Collapse**: displays box titles for the first level in the chart.
 - c. **Full/Expand**: displays all fields of information for all boxes in the chart.
 - d. **Full/Collapse**: displays box titles for the first level in the chart.
 - e. **Show icons**: displays the OrgPublisher icons for job, employee, etc.
4. This sample shows the Tree View with Full/Expand and Show icons checked.



9 Other Views

9.1 Style View

The Style View displays a list of all Styles available to the user within the chart. For details on creating Styles and displaying this View, please refer to the Formatting manual.

9.2 Wizard View

The Wizard View is only available to the chart administrator. Select this View to easily access the most commonly used wizards.

Wizard View Button - 

Wizard View – Click to select the desired wizard.

