

OrgPublisher Formatting



OrgPublisher 10 Training

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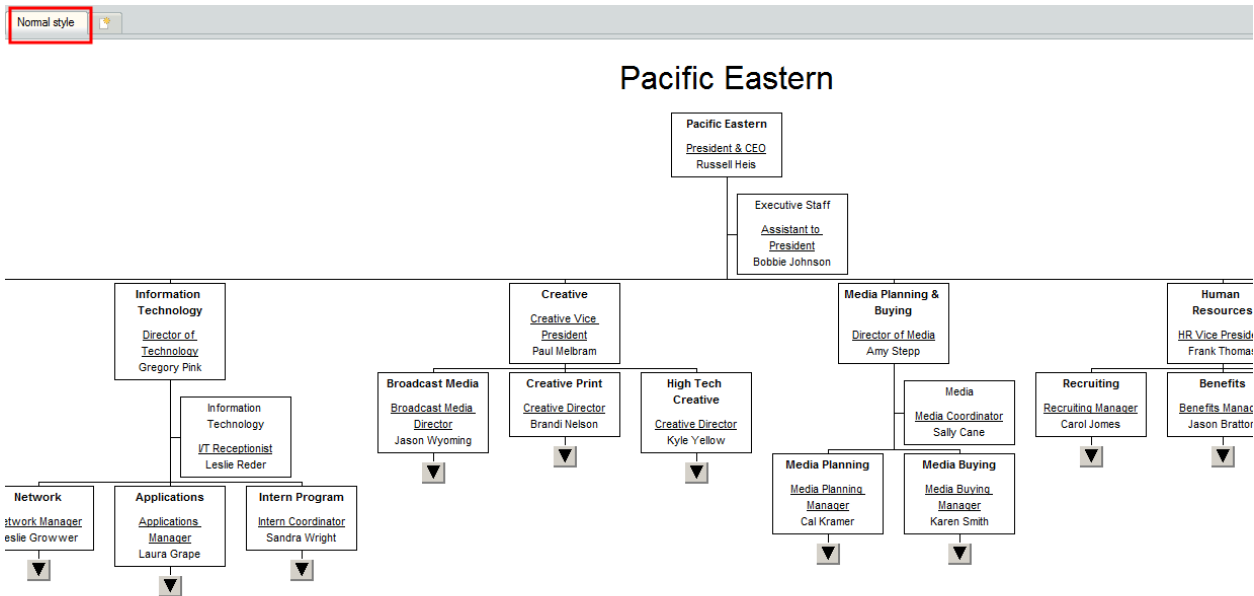
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1 Formatting Organizational Charts

When data is brought into OrgPublisher, a default format is applied. It is a very basic black and white chart. There is only one Style – Normal. Custom field data does not display until you Define and Assign them (see the *Custom Fields* manual for more details). Any Custom Position Types (see the *Custom Position Type* manual for more details) are not defined, and special formatting has not been applied.



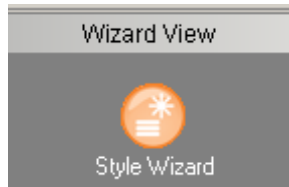
As the chart administrator, this is where you make the chart more serviceable for your viewers. You are now ready to choose what data displays, how it displays, how it looks when it displays, and where it displays. You can customize the coloring, following your corporate guidelines.

If you have multiple audiences who need to see the same data, but the data needs to be represented in the chart or any of the Views (see the *Views* manual for more details) differently, you have the ability to set this up with formatting. With OrgPublisher, one chart can contain many different styles applied against the same data. If one of your customers wants the phone number to display in the chart box and another group of customers do not, you can create two styles in the same chart to meet both of their needs.

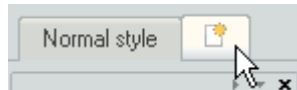
2 Creating a Style

A style is a collection of all of the formatting choices you have made. OrgPublisher charts can contain multiple styles. Styles can be created in one of two ways:

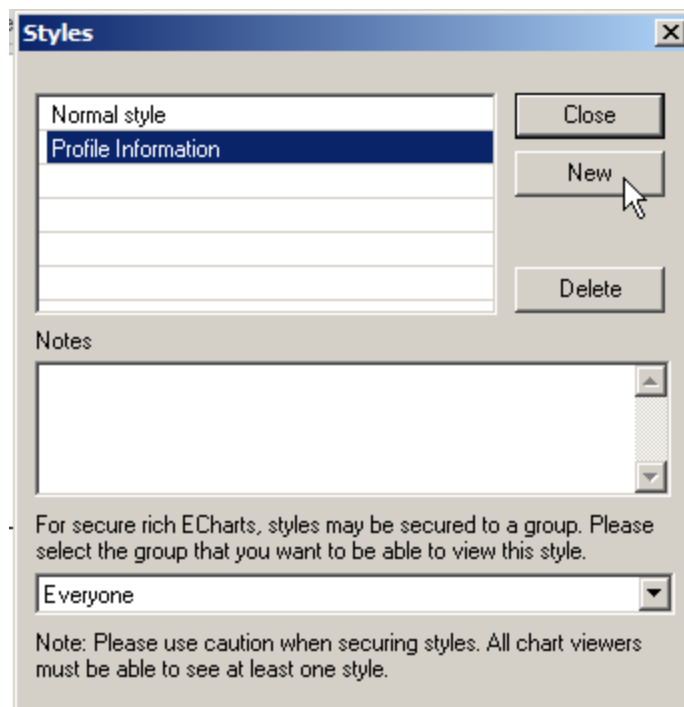
1. Style Wizard guides you through the creation of new styles.



You can also start the Style Wizard by clicking the Style button.



2. Select File, then Styles
 - 2.1. In the Style manager window, click New to create a new style based on the selected style.
 - 2.2. Select the text "Copy of . . ." and type in your own name for the style.
 - 2.3. Select a style, and then Delete to remove.
 - 2.4. Select a style, and then add notes.



2.1 Style List Selector

OrgPublisher displays available Styles with tabs across the Style toolbar or from a drop down. The drop down can be anchored, as shown below. Within OrgPublisher, the last tab contains a New Style button which will launch the Style Wizard when selected.

To toggle between a tabbed view or drop down view:

1. Right click on the Style toolbar.
2. Click to uncheck the Show styles in tabs option.

Tabbed View

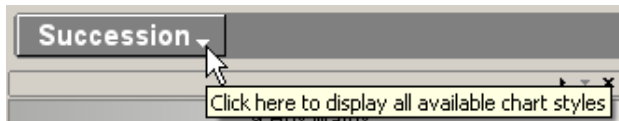


In OrgPublisher – the last tab contains a New Style button and will launch the Style Wizard:



Please note: In a published chart, the New Style tab (last tab) is not available.

Drop down Style View option



To anchor the Styles View in a Style,

1. Click the drop down to open the Styles View window.
2. Click the pushpin button to keep the view window open.
3. If you want to anchor the Styles View in each style, navigate to each style and repeat the previous steps.

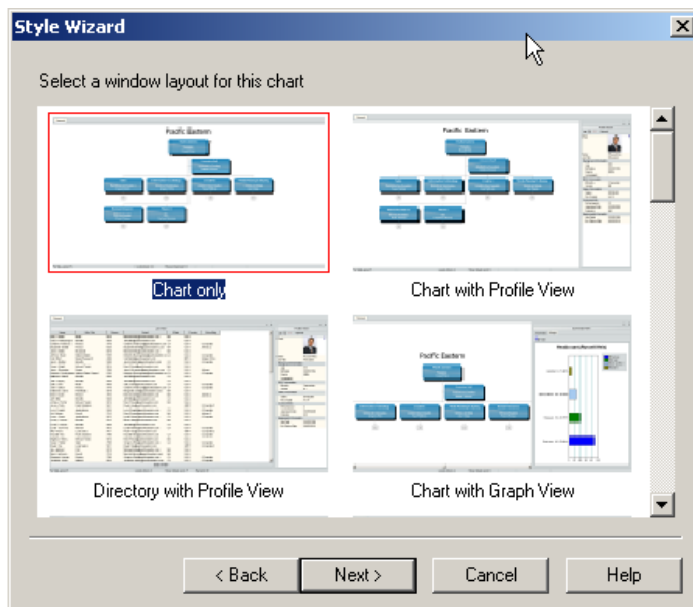


3 Instant Formatting with Chart Design Templates

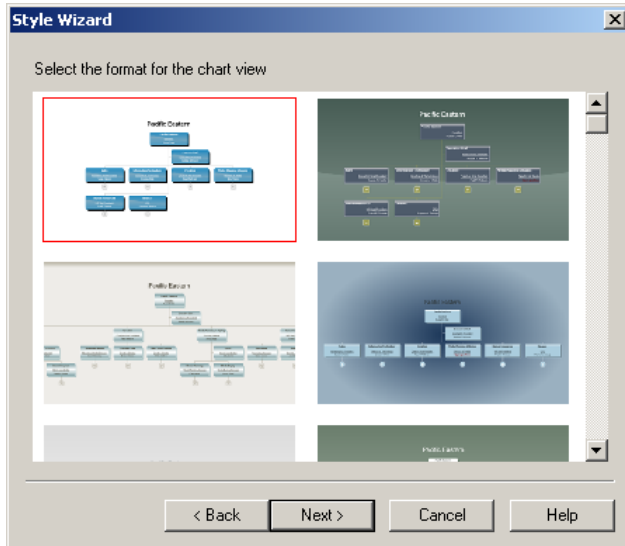
These templates will apply instant formatting to brand new charts or enhanced formatting to existing charts. If you switch styles or create a new style, you can apply a second template to that style.

3.1 Applying a Chart Design Template to a New Chart

1. Start the New Chart Wizard.
2. When prompted, select the option to **Use this wizard to create a new style.**
3. Then select **Selecting a chart design template.**
4. Your first option is to select the layout of the chart. Scroll to find the views you wish to see. After selecting, click Next.



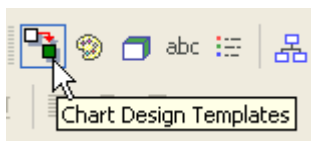
5. Scroll to select the desired formatting for the chart view. Select and then click Next.



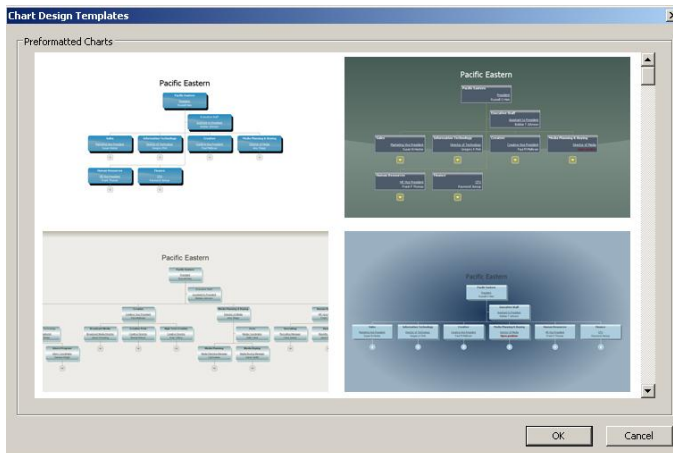
6. Click Finish.

3.2 Applying a Chart Design Template to an Existing Style

1. Open the chart.
2. Select the Chart Design Templates button.



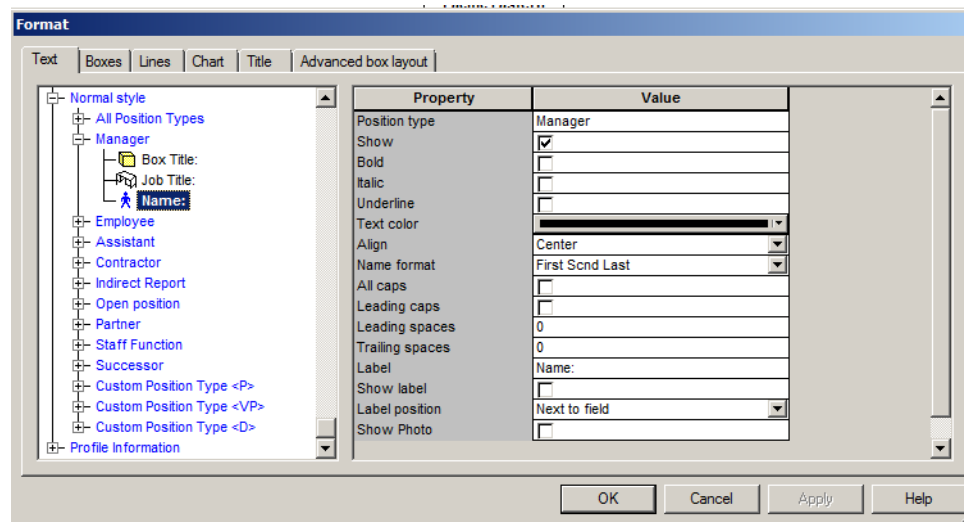
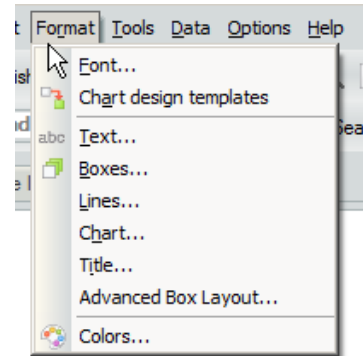
3. Scroll to find the design you prefer, click to select.



4. Click OK to apply the design template.

4 Format Menu

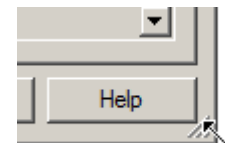
1. Select Format on the Menu bar.
2. Select the Attribute you wish to Format.
3. The Format dialog has several tabs with formatting options:
 - a. Text
 - b. Boxes
 - c. Lines
 - d. Chart
 - e. Title
 - f. Advanced Box Layout



4. After making changes:
 - a. Select OK to apply and close the dialog box.
 - b. Select Apply to apply the change, and leave the dialog box open for further changes.

4.1 Resizing Dialog Boxes

Dialog boxes that require a scrollbar to see all available options are resizable by placing the mouse pointer on any corner or edge of the window. Hold the left mouse button down and drag to increase the height and width of the window.

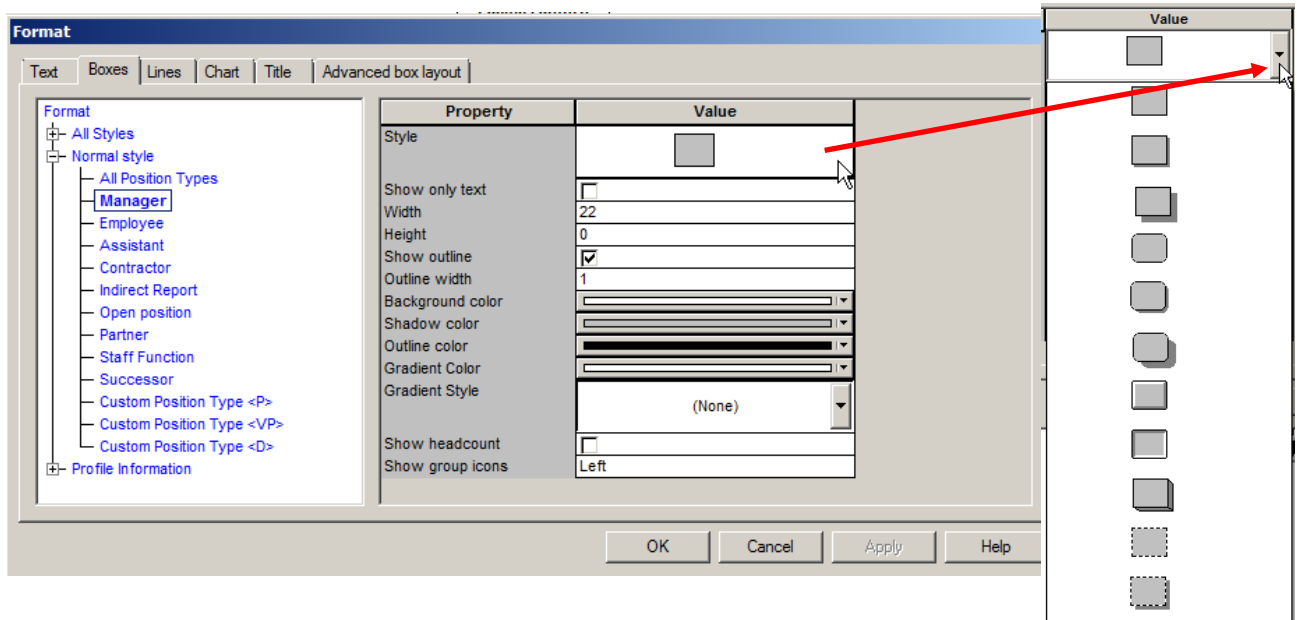


5 Formatting Boxes

For each Position Type you can define:

- Style
- Height
- Width is set for the whole chart and is applied for each Position Type when modified.
- Option to display box outline and adjust box width
- Background, shadow and outline color
- Apply a gradient to the background
- Group Icon display (More details offered in the Search and Group document.)

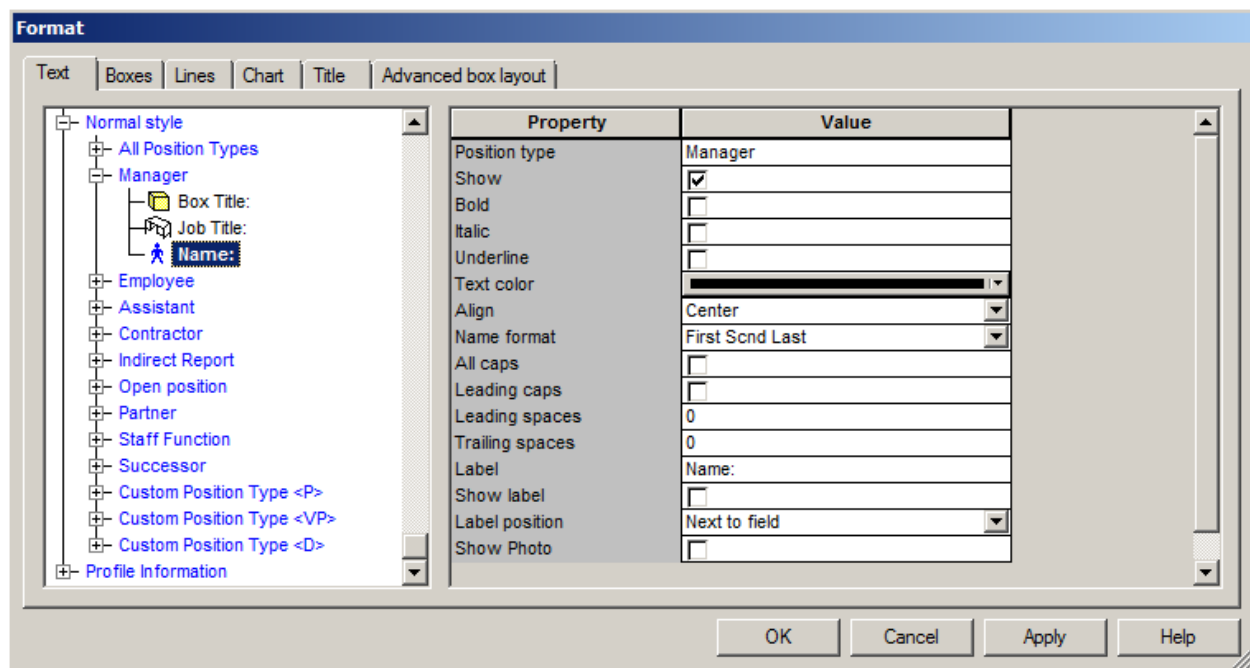
Select All Position Types to set the default look for the whole chart.



6 Formatting Text

For each Position Type, you can select which Box element and associated custom fields you wish to modify. The following options can be modified:

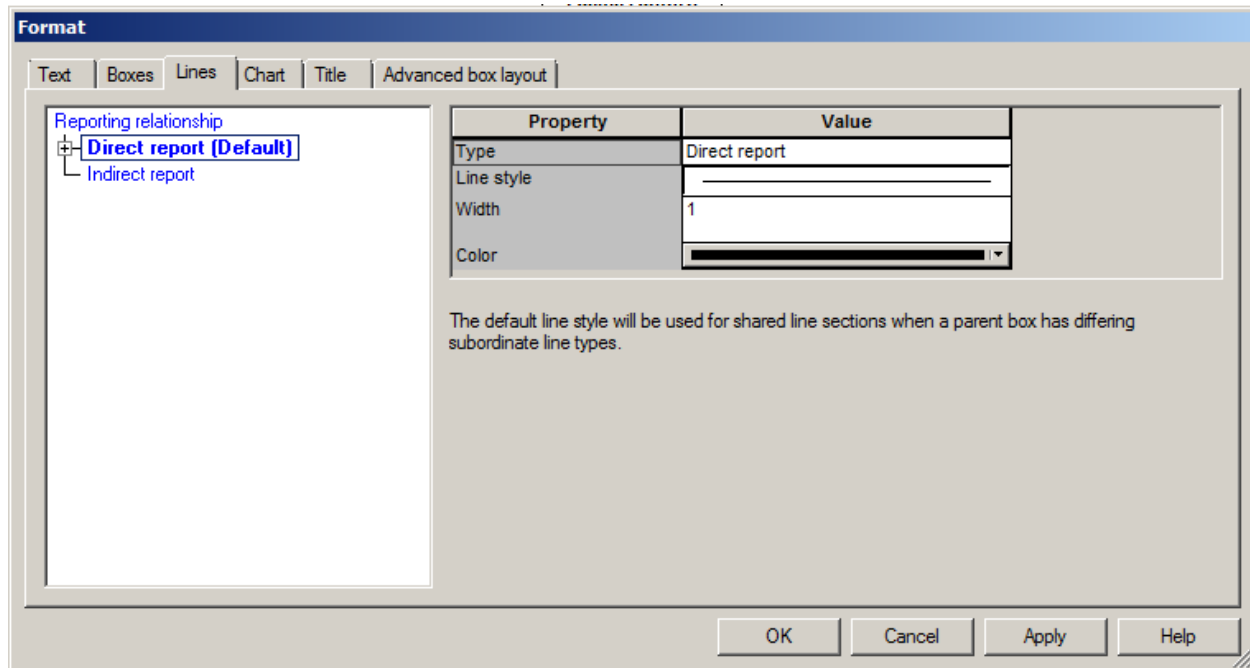
- Display or not
- Bold, italic, underline, color
- Alignment
- All Caps, leading caps
- Leading and trailing spaces
- Label Name, display and position
- Photo display



7 Formatting Lines

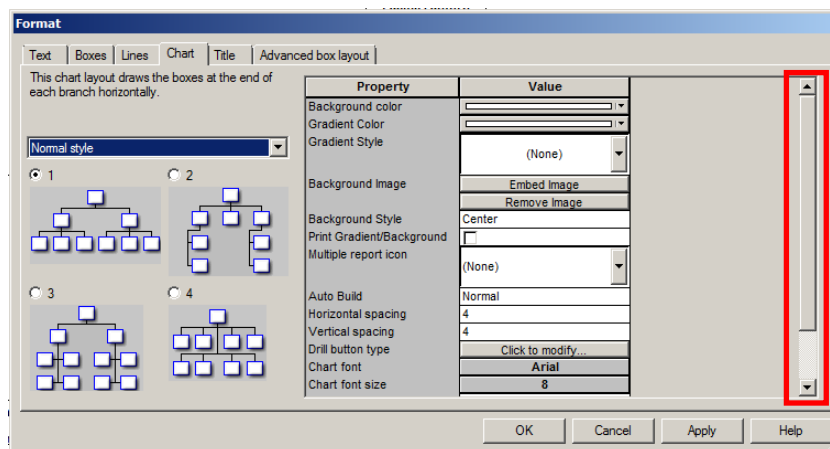
For each Position Type, you can format the connection lines. Select the specific Position Type or select All Position Types to select for the whole chart. The following options can be modified:

- Line Style
- Width
- Color



8 Formatting the Chart

- Box Layout applies to the configuration for the lowest level boxes displayed
- Background color, gradient and style
- Background image and if it should be printed
- Display Multiple Report Icon and select the icon
- Auto Build – Everyone has their own box, all employees in a box below the manager or manager and employees in the same box
- Box spacing – horizontally and vertically
- Drilling button modification
- Chart Font and size
- **If chart layout 1, 2 or 3 is selected:**
 - Align the top of the boxes
 - Hide lowest level boxes
- **If chart layout 4 is selected:**
 - Automatic row size option displays. This controls how many boxes across display based on user window size.
 - Boxes per row – allows you to control the number of boxes that display on a row
- Show Hover Profile – More details in the Profile View document
- Hover profile display – How long the mouse must hover before the Hover Profile display

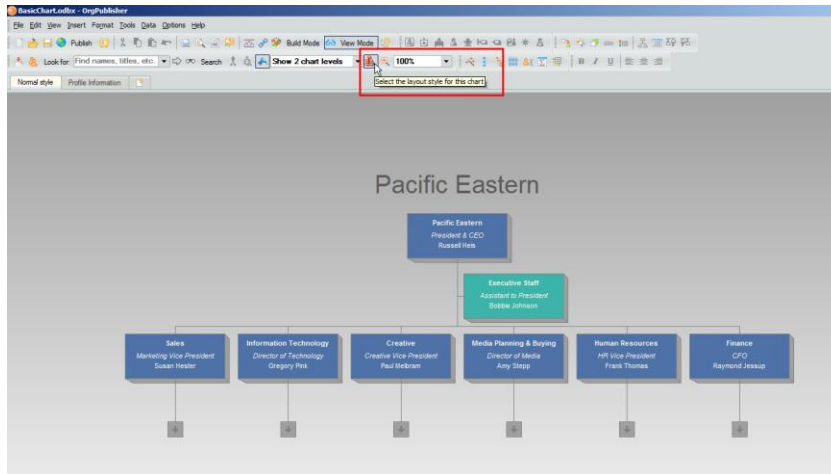


Additional options
available by
scrolling

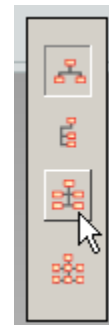
8.1 Chart Box Layouts from the Toolbar

Chart Box layouts can also be set from the toolbar. This feature is available in OrgPublisher for the chart administrator as well as in charts published as PluginX and EChart Rich Client. Changing the chart layout is a simple click.

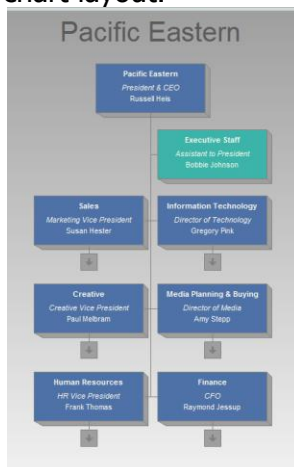
1. Click the Select the layout style for this chart



2. The current layout is selected in the drop down list. Click to select the desired layout. Chart Layout 1, horizontally represented lowest level boxes, is the current selection.



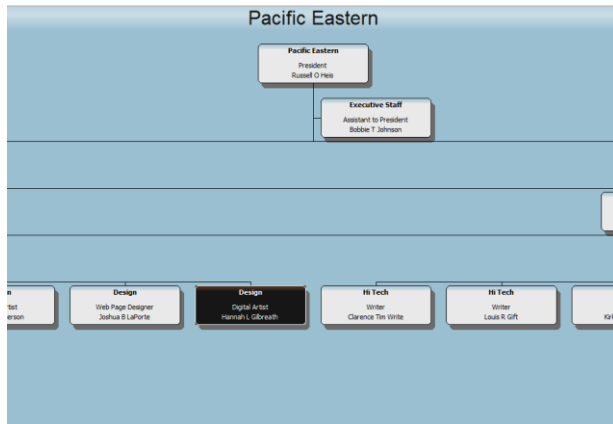
3. Chart Layout 3, side-by-side vertical boxes is selected. The chart will dynamically change the chart layout.



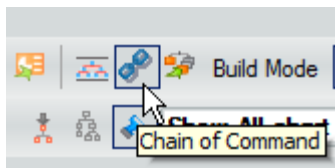
8.2 Chain of Command Layout from the Toolbar

To display a person's chain of command:

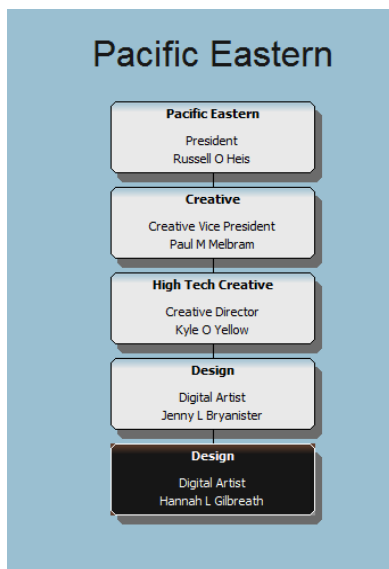
1. Select the person's chart box.



2. Click the Chain of Command button.



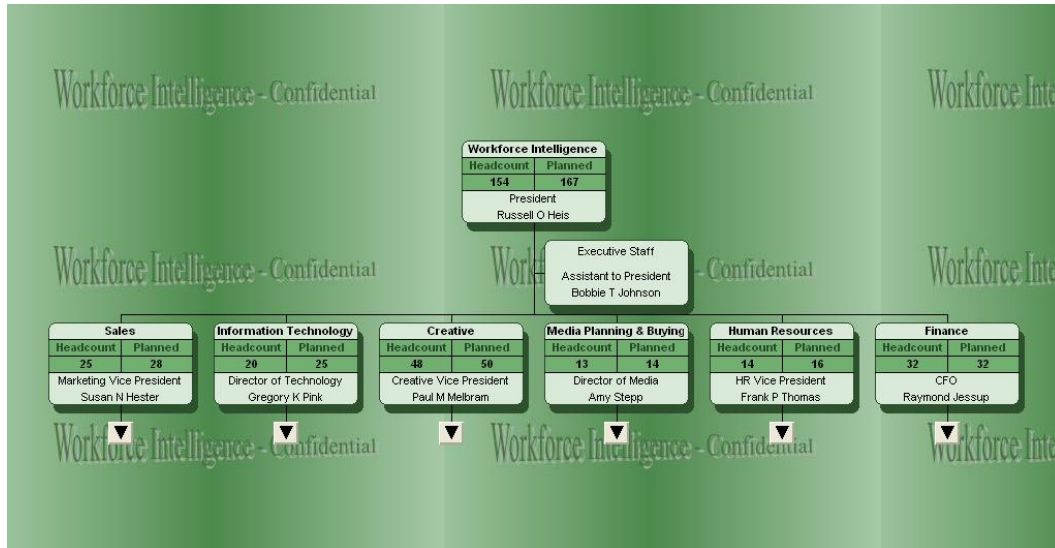
3. The Chain of Command for the selected box is now displayed.



4. Click the Chain of Command button to turn off the feature.

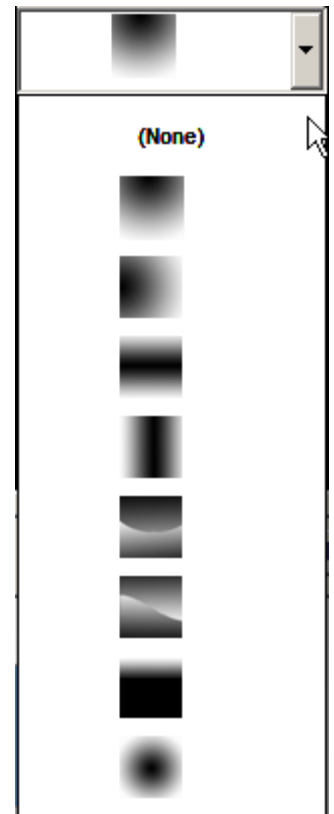
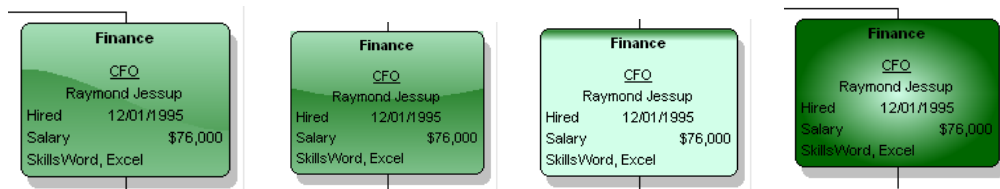
9 Background Image & Gradient Example

The format a Chart tab offers the option to apply gradients or add a background image to the chart. The example below has a Company Name Confidential image tiled and a gradient background.



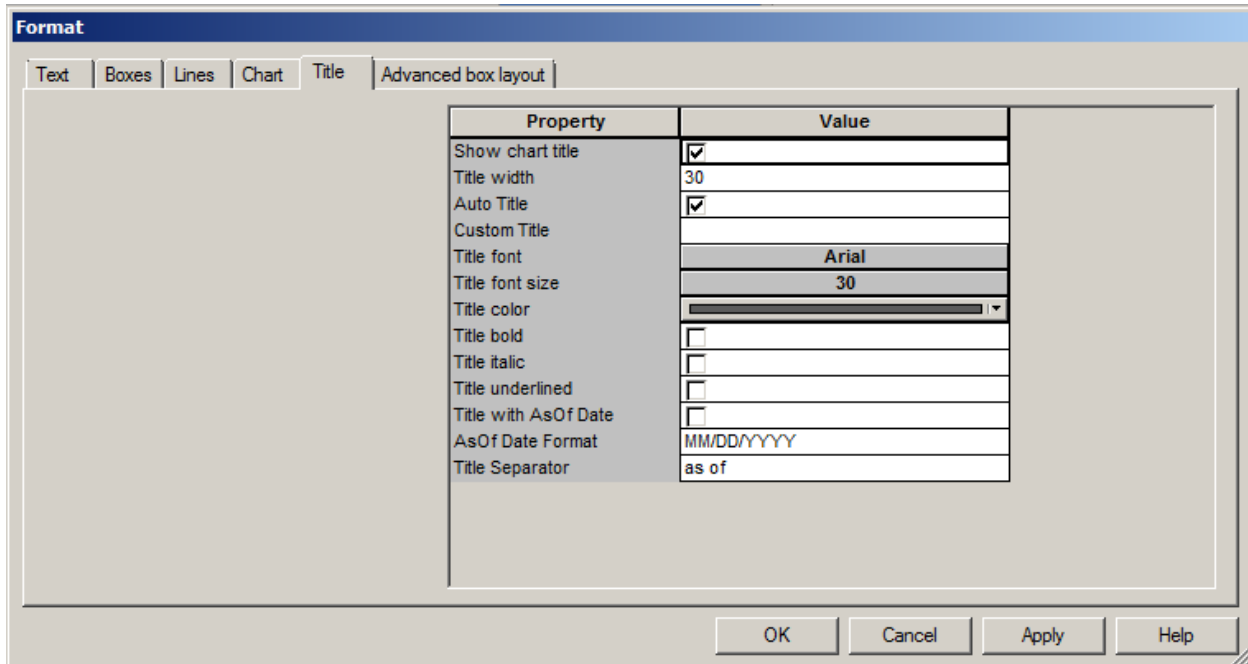
9.1 Chart Box Gradient Examples

The chart boxes below display several of the gradient options available.



10 Formatting the Title

You can choose to show a title, use a custom or auto title, and define the format of the title. Auto Title displays the Box Title for the top box of the current view. An As Of date can also be added to the title.

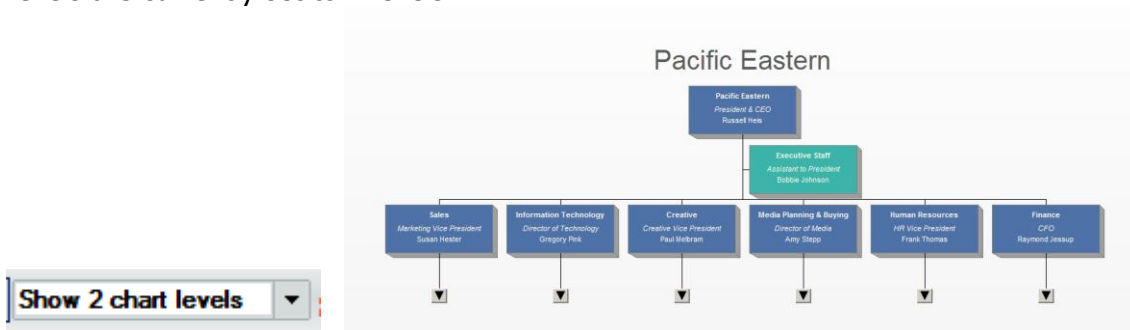


11 Levels and Drilling

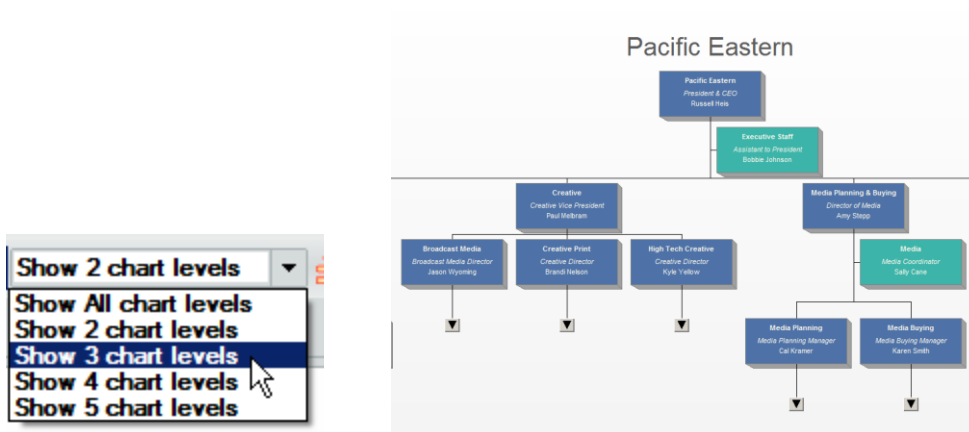
Drilling is turned on and arrows are displayed in the chart



Levels are currently set to 2 levels



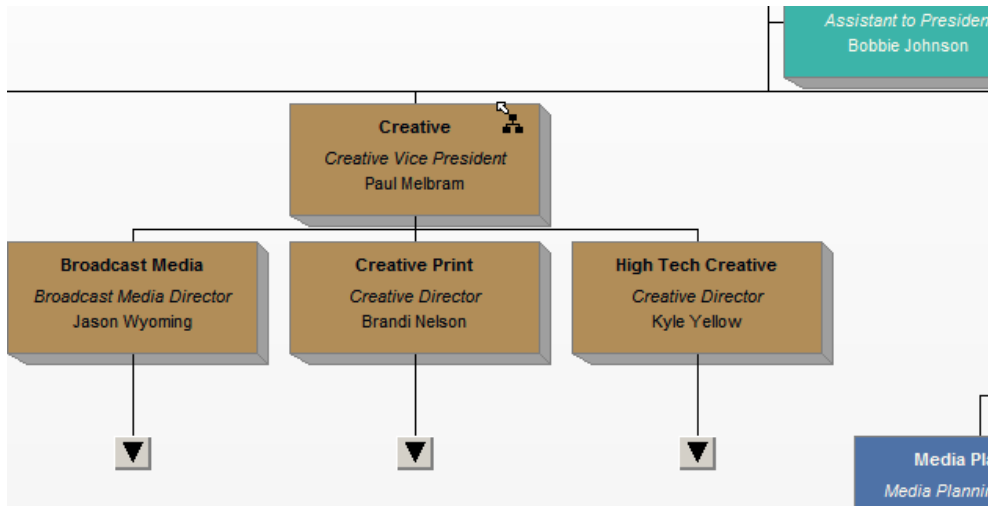
Select the drop down arrow to change the number of levels displayed



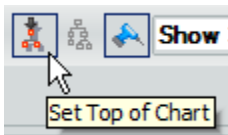
Select All chart levels to display all of the levels below the current top box

12 Setting Top of Chart

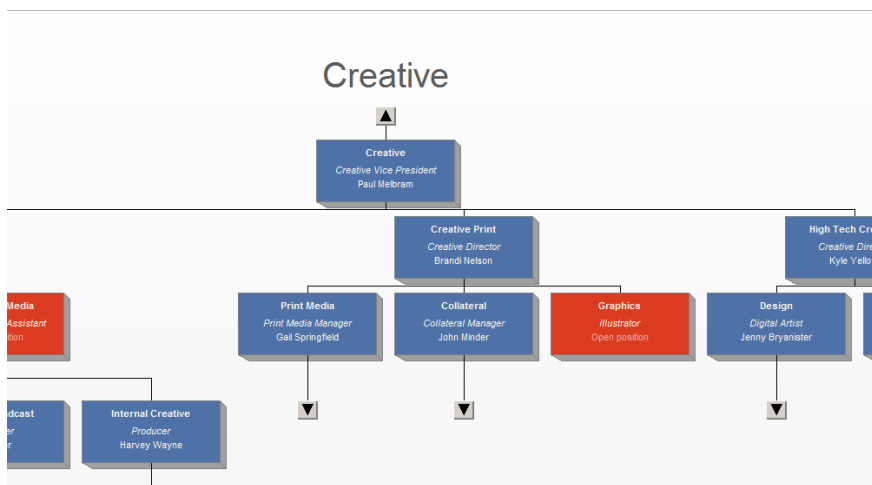
1. Place the mouse pointer on the top edge of the box you wish to set as the top of the chart. Click to select the box and all of its reports.



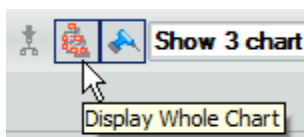
2. Select the Set top of Chart button



3. The Creative Department becomes the top of chart.

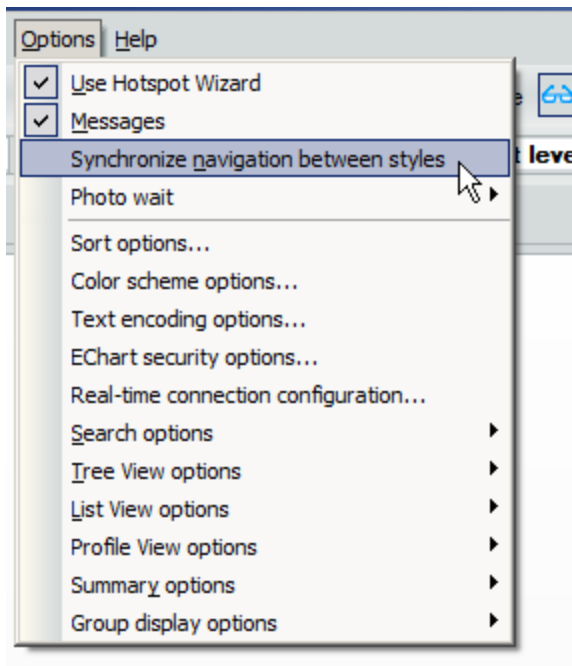


4. To return to the whole chart, select the Display whole chart button



13 Synchronizing Navigation between Styles

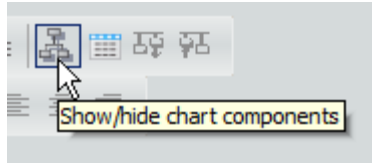
There is an option to synchronize navigation between styles. If the user navigates to their box within the chart and this feature is activated, when they switch styles they will see their chart box. If a specific box has been set as the top of chart within a style, the synchronization setting will override the top of chart setting.



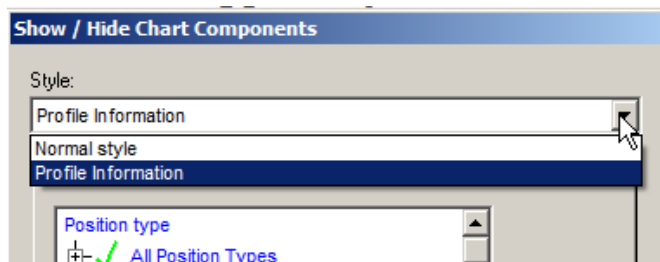
14 Show/Hide Chart Components

Data displayed in the boxes is controlled using the Show/Hide Chart Components Option

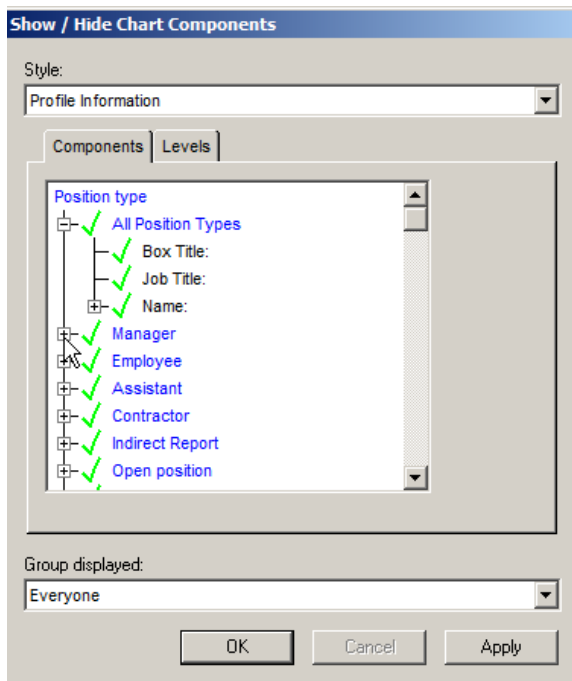
1. Select the Show/Hide chart components button



2. Select the style to be modified. The current style is selected



3. Select the + beside a specific Position Type or All Position Types. Select the + beside the attribute you wish to hide or display.

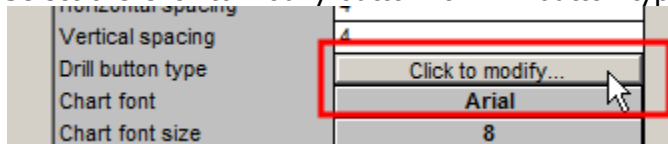


4. Click to select the fields that you do not want to display.
 Red **X** does not display
 Green **✓** does display

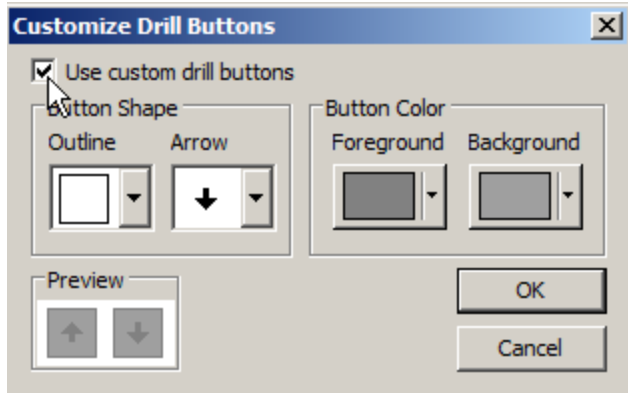
Please note: If Advanced Box Layout is used in a Style (see the *Advanced Box Layout* manual for more information), these selections do not override those settings.

15 Enhanced Drill Buttons

1. Select Format, then Chart.
2. Select the Click to Modify button for Drill button type.



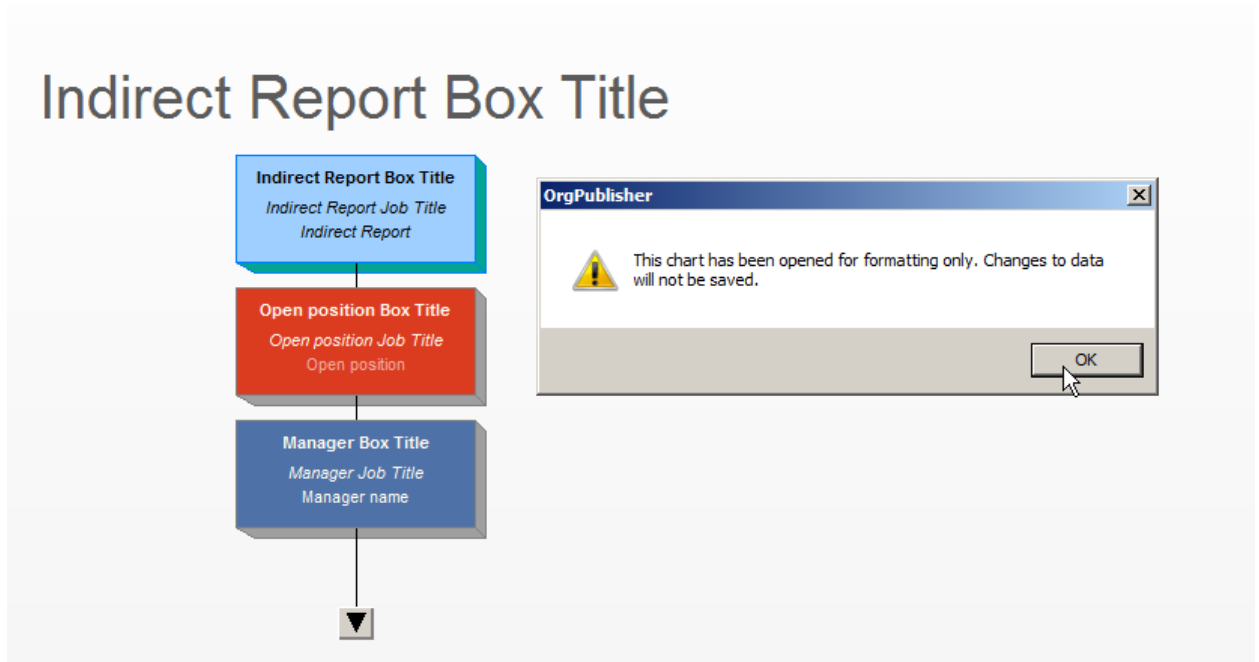
3. Select Use custom drill buttons.



4. Click to select:
 - 4.1. Outline shape
 - 4.2. Arrow shape
 - 4.3. Foreground and background colors
5. Click OK to complete.

16 Open for Formatting Only

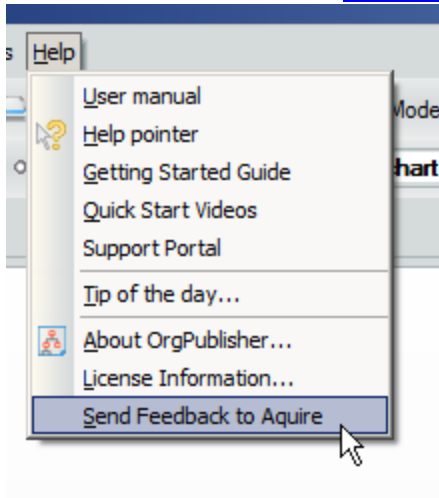
1. Select **File**.
2. Then **Open for formatting only. (Open a .ocb file)**
3. Click OK to confirm you want to do formatting only.
4. All formatting is brought in – one box representing each Position Type is also brought in. No data changes are allowed.



17 Send Feedback to Aquire

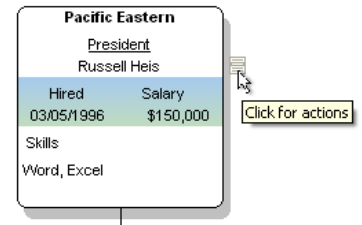
Aquire is interested in any feedback you have on the functionality and ease of use within OrgPublisher. Please give us your comments using the Feedback option.

1. Click on Help, and then Send Feedback to Aquire.
2. Email launches with the OrgPublisher version in subject line.
3. The email is addressed to feedback@aqire.com



18 Chart Action Buttons

Chart Action Buttons are available for each data field in the chart. This eliminates the need for the user to right click to see available options. This feature is available when charts are published as PluginX or EChart Rich Client and Organizational and Succession Planning charts.



In this example, the Job Title Action button was clicked. This data has Smart Links associated with the Job Title. The Smart Links appear at the top of the Action box. To learn more about Smart Links, see the Hotspots and Smart Links manual.

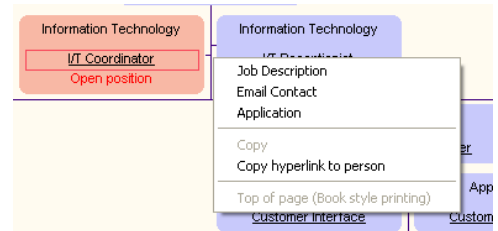


Chart action buttons have more options when used by the chart administrator within OrgPublisher. The following screenshot shows the same box and job title from the chart administrator's perspective.

