

# **OrgPublisher End User Help**



# Table of Contents

End User Help.....	1
Making the Chart Work for You .....	1
How to Tell if You're Working with a Thin Client or PluginX Chart.....	3
New for OrgPublisher 10 .....	5
Adding a Group Category .....	5
Creating New Groups for Planning Charts Using the Group Creation Assistant .....	7
Printing the Published EChart as PDF .....	13
Using Print Preview Enhancements to Print Charts .....	14
Using the Smart Search Option .....	15
Using the Toolbar Search with Quick Search Results .....	16
Viewing a Chain of Command.....	17
General Chart and View Capabilities .....	21
Adjusting Column and Row Widths in Views.....	21
Copying a Hyperlink to a Person in the Chart .....	21
Copying the Summary View.....	21
Embedding or Copying Charts .....	22
Going to the Top of the Displayed Chart .....	22
Locating Information with the List View .....	23
Locating Information with the Tree View .....	23
Opening a Password Protected Chart.....	23
Opening and Pinning the Styles View .....	24
Selecting Drilling Options .....	24
Sending the Chart to Microsoft PowerPoint.....	25
Setting the Top of Chart.....	26
Sorting the List View.....	26
Understanding Profile View Subheadings .....	27
Understanding the Chart Legend .....	28
Using Click and Drag Scrolling.....	28
Using OrgPublisher in Accessibility Mode .....	28
Using the Symbol Indicators in Tree View .....	29
Viewing Information in the Profile View .....	30
Viewing a Chain of Command.....	31

Viewing the Hover Profile .....	33
Viewing the Matrix Reporting Hover Display .....	34
Searching for and Working with Groups .....	35
Adding a Group Category .....	35
Adding a New Group to the My groups Tab .....	37
Adding a Person to a Group in the My groups Tab.....	38
Deleting a Group from the My groups Tab .....	38
Editing a Group Definition in the My groups Tab .....	39
Exporting and Importing Groups from the My groups Tab .....	39
Opening a Selected Group in the Chart View .....	40
Removing a Person from a Group in the My groups Tab.....	40
Saving Side-by-side Profiles as Groups.....	41
Searching Charts.....	41
Sending Email to a Group in the My groups Tab .....	43
Spotlighting Search Results or Groups in the Chart View .....	43
Using the My groups Tab in the Search Dialog.....	44
Viewing Search Results in Microsoft Excel .....	44
Using the Smart Search Option .....	45
Using the Toolbar Search with Quick Search Results .....	46
Previewing and Printing Charts.....	49
Creating and Editing a Book Style Page Customization List .....	49
Customizing Header and Footer Information .....	49
Previewing and Printing a Book Style Chart.....	51
Previewing and Printing a Wall Style Chart.....	53
Printing a 9 Box Matrix.....	58
Printing a Chart Legend.....	58
Printing a Workforce Analysis Graph .....	59
Printing the Published EChart as PDF .....	59
Selecting Pages to Print in Book Style Preview .....	60
Sending the Chart to Microsoft PowerPoint.....	60
Using Print Preview Enhancements to Print Charts.....	61
Working with Organizational Model Planning for Administrators.....	65
Creating a New Planning Chart.....	65

Creating New Groups for Planning Charts Using the Group Creation Assistant .....	65
Deleting a Planning Chart .....	71
Managing Planning Charts .....	72
Opening a Planning Chart .....	72
Setting Levels for Planning Charts .....	72
Storing Planning Charts.....	73
Working with Succession Planning for Administrators.....	75
Adding a Succession Candidate to a Box.....	75
Creating a New Succession Planning Chart.....	75
Creating Side-by-side Profiles .....	75
Printing a 9 Box Matrix.....	77
Saving Side-by-side Profiles as Groups.....	77
Searching for Person Successor Counts .....	77
Searching for Successors in a Box .....	78
Viewing the 9 Box Matrix.....	79
Index.....	81



# End User Help


---

## Making the Chart Work for You

These pages will help you make the most of OrgPublisher's feature-rich published chart. Depending on the choices made by your chart Administrator, all of these features may not be available to you.

**Note:**

*Published real-time charts provide single field searching capabilities; complex or group searching and saving **My groups** are not available. In addition, published real-time charts do not contain the summary reporting feature.*

If you are an Administrator who will publish modeling or succession planning-enabled charts, the published chart will contain a specific toolbar with a Planning button  **Planning**. This button may look different, depending on whether your published chart is enabled for both org modeling and succession or just one of the planning options. Click the button if you or designated planners want to create, open, and delete planning charts for organizational modeling or succession planning. Additional online help is provided for the planner within the planning chart. See the Working with Organizational Model Planning for Administrators topic.

Once you open a published chart in your browser, you can view an organizational chart which may contain photos and other pertinent information. In addition, you may be able to see a *List View*, often used as an up-to-date phone list, a *Profile View*, often displaying a photo and additional information about an employee, or a *Summary View* providing numerical information, such as sales dollars, percentages, or a graph version of the summary totals.

If made available by your chart Administrator, you can send a chart to Microsoft® PowerPoint via the print preview feature, as well as view search results in Microsoft Excel.

Depending on which features your administrator has made available, you can perform several tasks using toolbar buttons, or you can use the *Search View*, accessed through the *List View*, to create and save your own groups, and much more.

If you open a real-time chart you can conduct simple searches in order to create groups, access summary reporting, or save your own groups.

Real-time charting does not offer the following features:

- summary/analytic reporting
- compound searching
- group-based searching

New for OrgPublisher 10

## Working with a PluginX chart

In addition to viewing information you can, depending on the choices of your administrator, perform any number of tasks pertaining to:

General chart and view capabilities

Searching for and working with Groups

Previewing and printing charts

Working with Organizational Model Planning for Administrators


### Working with Succession Planning for Administrators

Your administrator may have published your chart as a Thin Client, in which case the scope of some features may be limited. Review [How to tell if you're working with a Thin Client or PluginX Chart](#) for additional information.


If you have specific questions that these help pages cannot answer, please contact your administrator for more information.

## How to Tell if You're Working with a Thin Client or PluginX Chart

Your chart Administrator may have published your chart as a Thin Client, in which case the scope of some features may be limited.

Click on the OrgPublisher button  in the toolbar. The *About* text box tells you whether you are using a PluginX or Thin Client chart. The thin client chart format enables your chart Administrator to publish a chart without placing add-on controls to your PC, but at the same time, some of the OrgPublisher features are not fully enabled. See the list below for details.

There are several reasons why you should know that you're working with a Thin Client chart.

- Depending on the choices made by your chart Administrator, all views are available except the *Tree View*.
- You can copy a chart only by using your browser **Edit>Select All>Copy** menu option.
- You can copy only the visible records in a search results list by selecting the list and using the browser **Edit>Copy** menu option.
- The *Search View* does not contain a separate *List View* pane.
- You cannot resize or move the views.
- You can use the toolbar Print button  to print only the *Chart View*, as a Book Style, via an Adobe PDF (portable document format) document.
- You can click on hotspot links that may be in the chart or *Profile View*, but a Smart Links list (list of all hotspot links associated with that field) is not available.
- The **My groups** tab is not available, and you cannot save or edit, ad hoc groups in Thin Client.
- The **Send email to group** feature is not available.
- You cannot zoom in or out in the *Chart View*.

If you have any further questions about your chart, please contact your chart Administrator.



Return to [Making the Chart Work for You](#)



## New for OrgPublisher 10

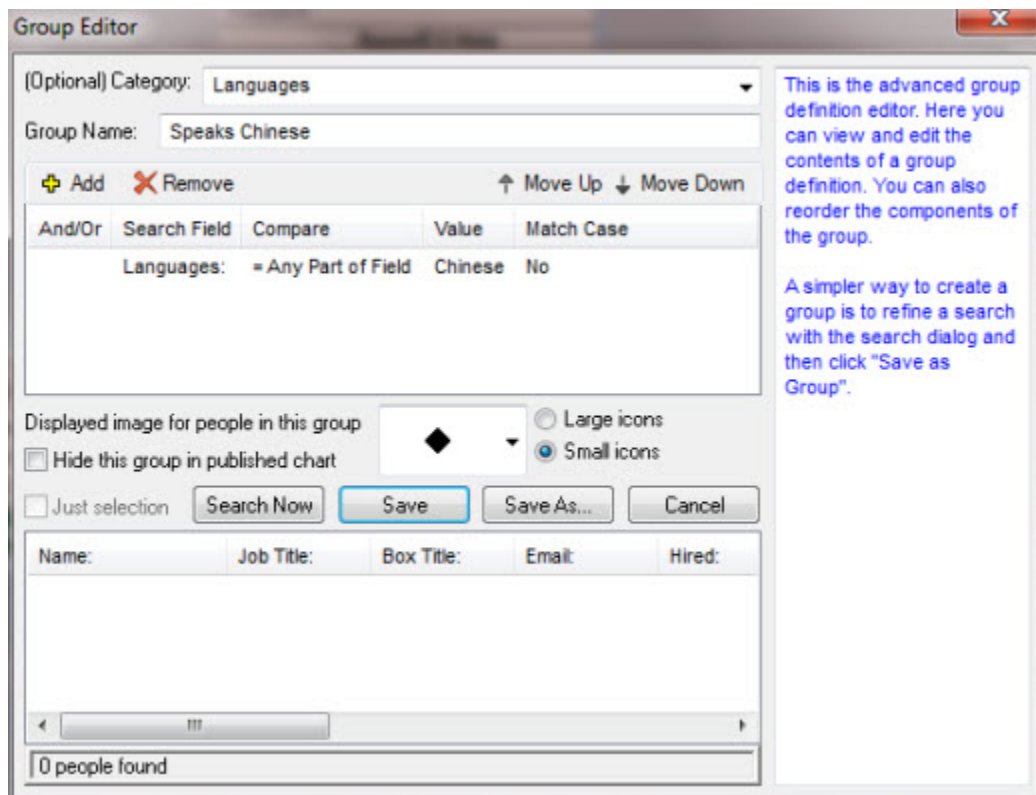
### Adding a Group Category

You can now add group categories to your chart in order to classify groups with a common theme, such as, for a global company, groups by country or HR items like retirements or ethnicity.

1. Open the **Groups** tab of the *Search* dialog by clicking the Groups button  in the toolbar, or by clicking the Advanced Search button  **Search** and selecting the **Groups** tab.
2. Double-click on a group name for which you want to create a category. The *Group Editor* dialog opens.
3. In the optional **Category** field, type the name of the category you want to add. The category name appears in the **Search Field** of the record displaying the selected group criteria.

**Note:**

The category name is not a searchable field. The **Value**, or group name, is the searchable field.




**Group Editor**

(Optional) Category: Languages

Group Name: Speaks Chinese

+ Add - Remove      ↑ Move Up ↓ Move Down

And/Or	Search Field	Compare	Value	Match Case
	Languages:	= Any Part of Field	Chinese	No

Displayed image for people in this group:   Large icons  Small icons

Hide this group in published chart

Just selection    Search Now    Save    Save As...    Cancel

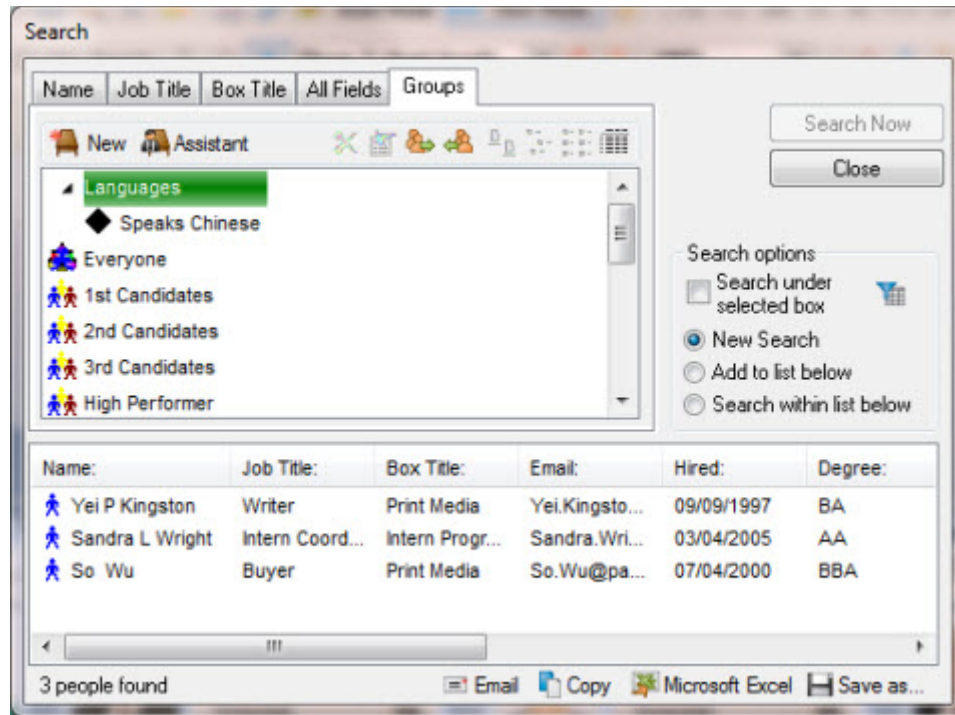
Name:    Job Title:    Box Title:    Email:    Hired:

0 people found

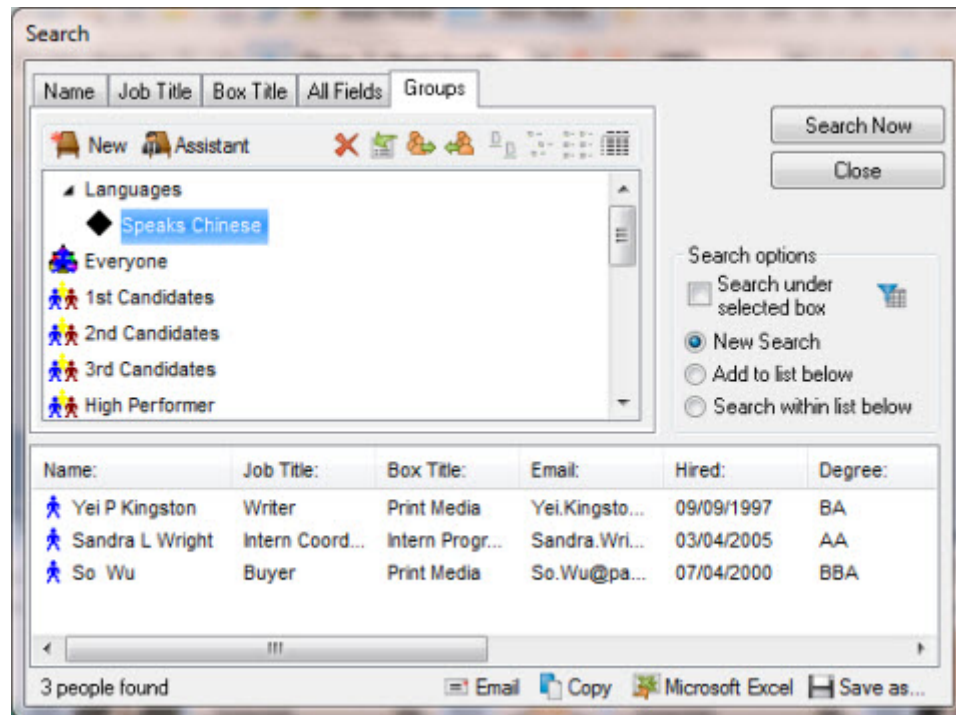
This is the advanced group definition editor. Here you can view and edit the contents of a group definition. You can also reorder the components of the group.

A simpler way to create a group is to refine a search with the search dialog and then click "Save as Group".

4. Click **Save**. The **Groups** tab re-displays with the new category name, and the group name indented below it. When selected, the **Category** name is highlighted in green.



When selected, the **Group** name is highlighted in blue.

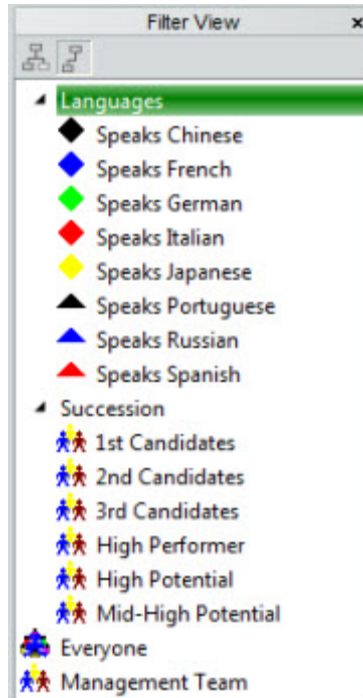


- Repeat steps 2 - 4 to add additional categories.

If you want to use an existing category, click the drop-down arrow in the **Category** field and select the name you want to use.



The *Filter View* displays the groups indented below the associated category name. The *Filter View* list first displays the category names in alphabetical order, then the associated group with the category name in alphabetical order, then the groups without categories in alphabetical order.



Return to *New for OrgPublisher 10*


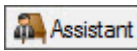
Return to *Searching for and Working with Groups*

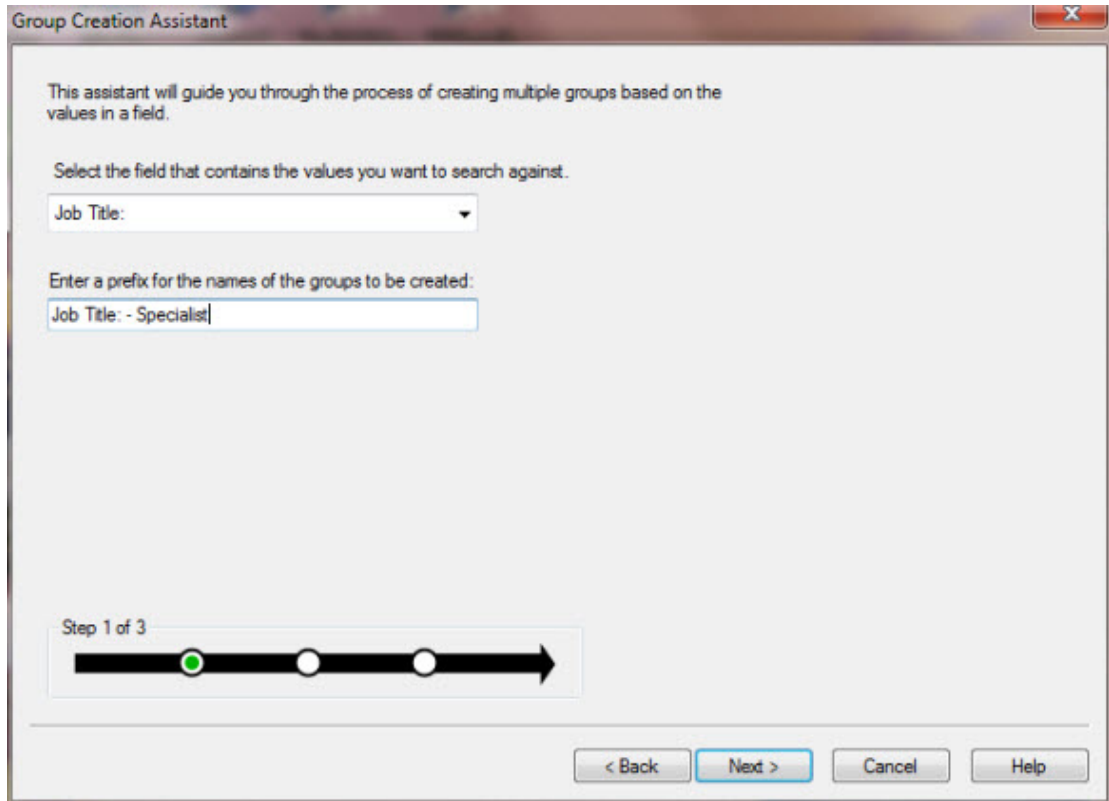
## Creating New Groups for Planning Charts Using the Group Creation Assistant

### Note:

*This feature is available only in Modeling and Succession planning charts.*

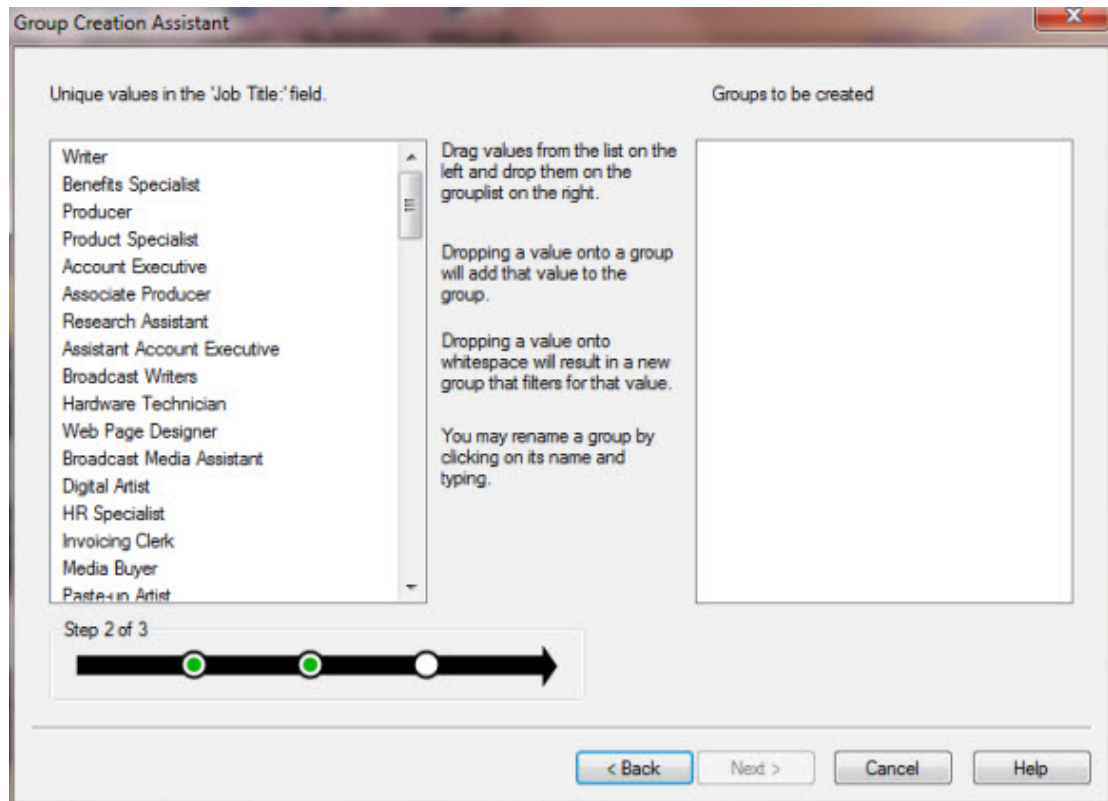
The *Group Creation Assistant* provides a series of dialogs which ask the questions needed to create multiple groups at the same time, although you can use the assistant to create a single group.

1. Click Search  Search in the Navigation bar. The *Search* dialog opens.
2. Select the **Groups** tab.
3. In the **Groups** tab, click the Group Creation Assistant button  Assistant. The *Group Creation Assistant Step 1* dialog opens.
4. Click the drop-down arrow in the **Select the field that contains the values you want** field, and select the field you want to search on.



5. Type a prefix or name for the group in the **Enter a prefix for the names of the groups** field. Click **Next**. The *Group Creation Assistant Step 2* dialog opens.

The left pane contains the values available for grouping the data in the field you selected. These values are sorted first by "hit" count (the highest number of records to match the criteria), then alphabetically.

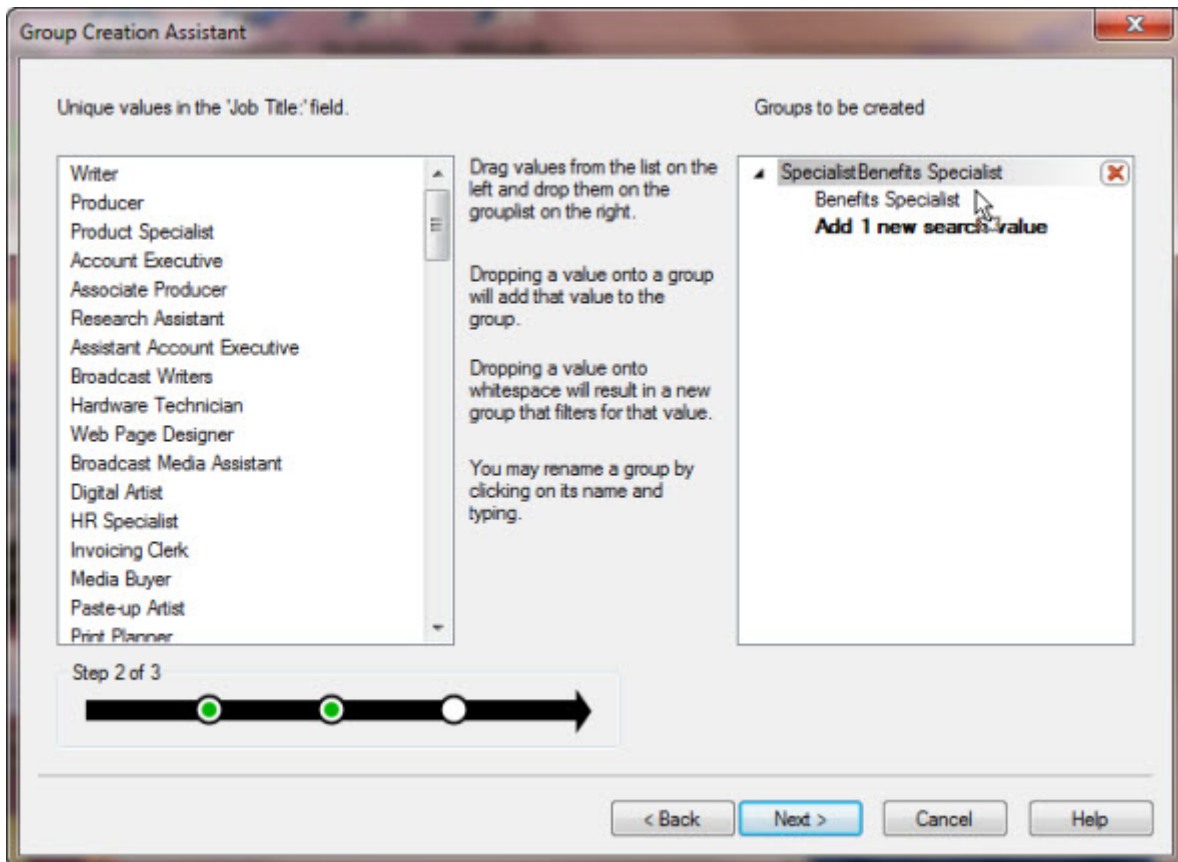


6. Drag and drop the correct value to the right pane.

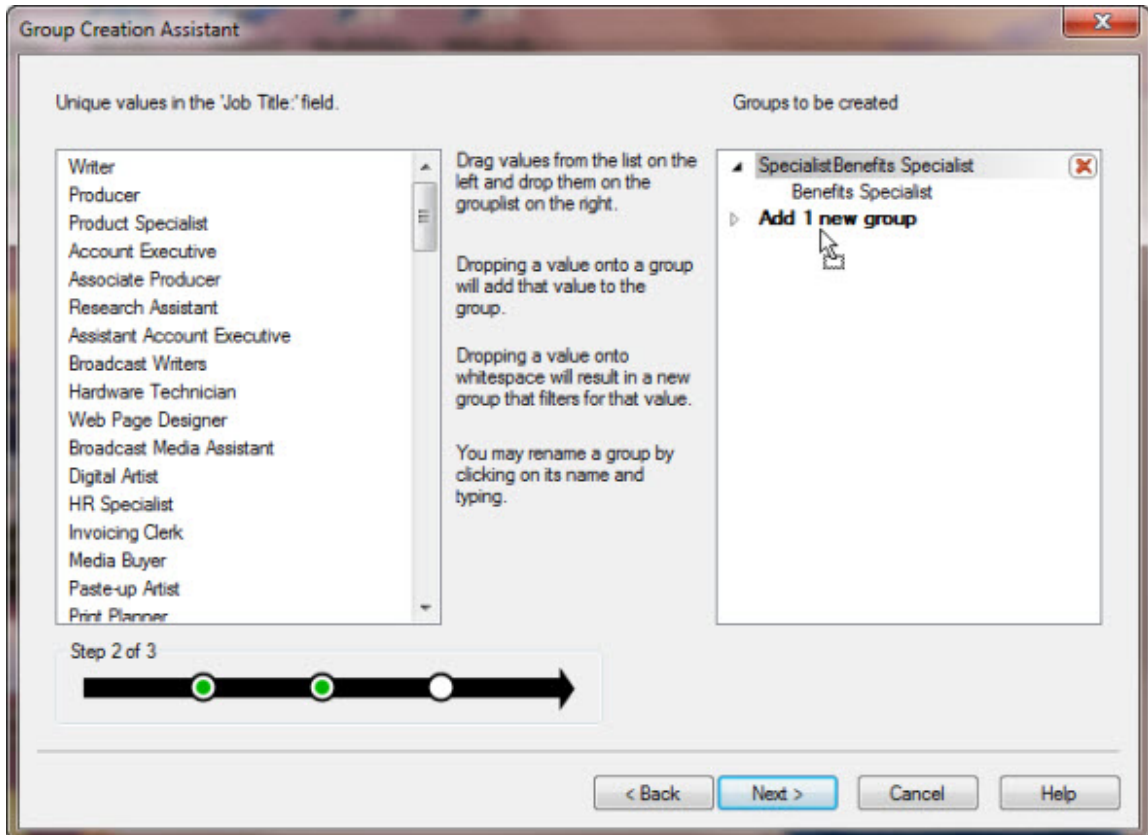
**Note:**

*You can create more than one group by selecting multiple fields.*

7. If you want to use multiple values from which to create the group, drag another value from the left pane and drop it on the first value.

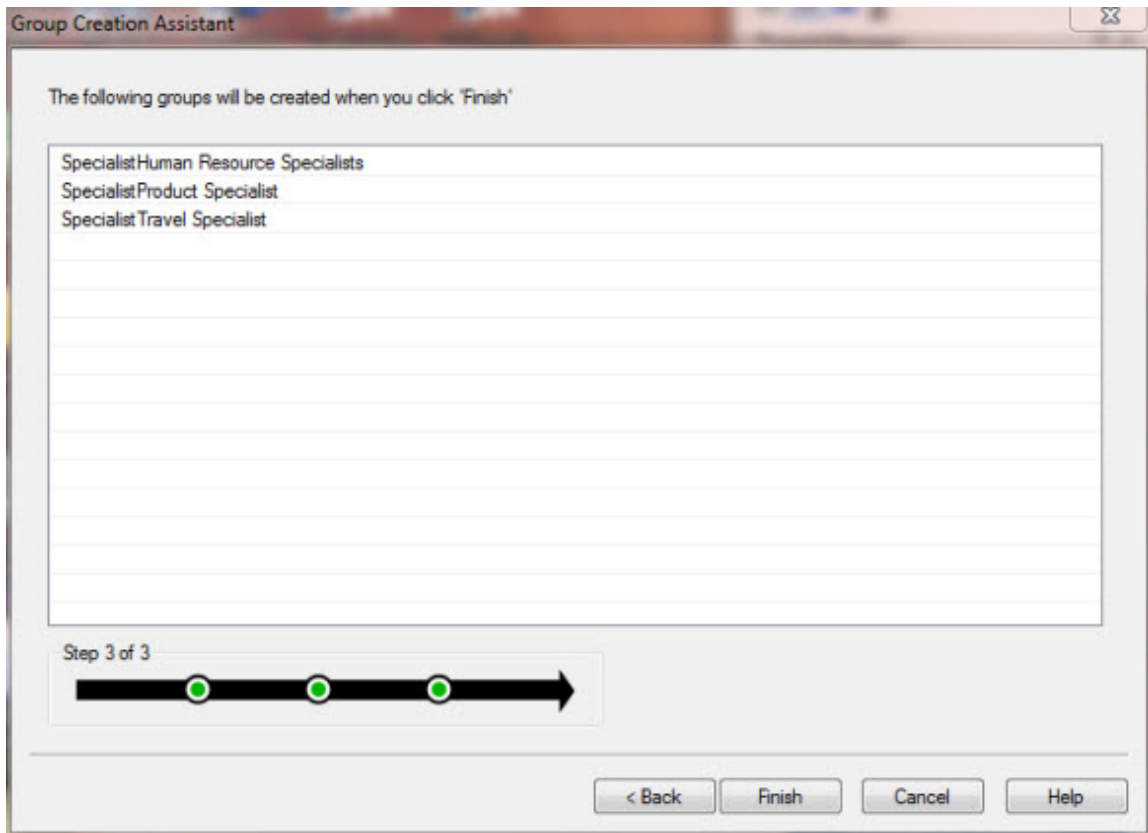


8. If you want to create multiple groups, drag a value from the left pane and drop it in the white space of the right pane.

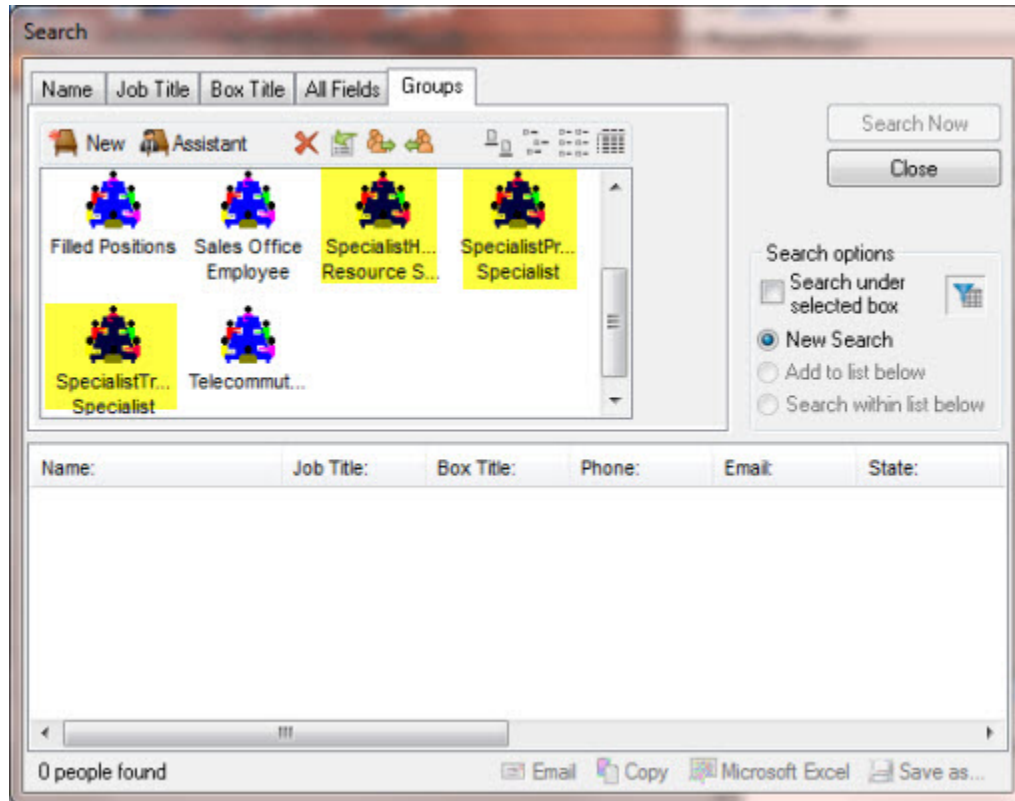


You can create several groups at the same time using single or multiple values in each. When you have created the group parameters you want, click **Next**.

9. The *Group Creation Assistant dialog Step 3* opens, displaying the groups that will be created. If the listed groups are correct, click **Finish**. If they are not correct, click **Back** and repeat the applicable steps 4 - 9.



The **Groups** tab of the *Search* dialog displays the groups that were created using the *Groups Creation Assistant*.



10. On the Style Bar, click the Groups View button  to display the *Filter View*.

11. Click on group to display it in the *Chart View*.

Return to New for OrgPublisher 10


Return to Working with Organizational Model Planning

## Printing the Published EChart as PDF

When the published EChart is opened and the Send to PDF button  displays in the toolbar, you can print the chart as PDF.

### Note:

*This feature is available for published ECharts only, but may have been disabled by the chart Administrator.*

1. Open the published chart. Verify that the Send to PDF button is enabled, as highlighted in the sample below.
2. Click the button  to create a PDF of the chart. A dialog opens that allows you to select the **Number of OrgChart levels** to print.

In addition, you can choose whether or not to **Include index**, a version of the *List View*.

3. Click **OK** when you have made your selections. A *File Download* dialog opens. You can **Open** the PDF immediately or **Save** the document to a folder of your choice.

When you open the PDF, the index is at the beginning of the document, if you elected to include an index.

The printed chart follows, displaying as many levels as you selected.

[Return to New for OrgPublisher 10](#)

[Return to Previewing and Printing Charts](#)

## Using Print Preview Enhancements to Print Charts

The OrgPublisher *Print Preview* features have been enhanced to provide more chart printing options. You can see detail of all the enhancements in the [Previewing a Book Style Chart](#) and [Previewing a Wall Style Chart](#) topics.

When working with a published Thin Client chart, OrgPublisher also provides a popup option to select the number of levels to print.

### Book Style preview

Both the Wall style and Book style previews now contain a Print Setup button for easier access to your print client.

The Book Style preview now provides the ability to print all levels of the chart using the Levels button .

The Book Style *Print Settings* dialog includes the Header/Footer button to open the *Print Header/Footer Options* dialog in order to configure the header and footer display.

### Wall Style preview

The Wall Style Preview has been configured to provide the preview and print controls at the top of the window. The controls also provide a section with thumbnails that give you an idea of what your chart will look like when you select a specific layout.

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit a the page. The first thumbnail shows the current default setting for the preview. The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.

Click the thumbnail you want to use, and its layout is displayed in the preview pane.

The default chart layout in Wall Style preview is based on the number of levels displayed in the *Chart View*.

- If 2 levels are displayed:
  - If there are 8 or fewer direct reports, chart **layout 1** is used.
  - If there are more than 8 reports, chart **layout 4** is used.
- If 3 or more levels are displayed, chart **layout 2** is used.

If you accept the default *Wall Style* preview settings, then no check is performed on the size of the chart when the preview is opened.

If you select one of the suggested *Wall Style* thumbnails, then OrgPublisher checks to see if the chart must be shrunk by 50% to fit on a single page when the preview. If so, then the zoom is set to 80%. In all other cases, zoom-to-fit is the default.

In addition, the *Wall Style* preview includes new buttons:

- opens you system *Print Setup* dialog to select printer, paper size, orientation, and source.
- removes all modifications made to the preview layout and returns to the OrgPublisher default layout.
- presents options, depending on the layout selected, to optimize the chart layout on the page.
  1.
    - **Compact boxes** - reduces the box size, field size, and drill arrow lines; shrinks box shadow.
    - **Use narrow font** - changes font to Arial Narrow 8pt.
    - **Put employees in box with manager** - Turns on **Auto Build**; available only when at least 1 leaf node box is visible.
    - **Hide secondary fields** - Turns on *Compact Build* mode.
    - **Customize** - Enabled if **Hide secondary fields** is selected; opens the *Select fields to print* dialog, displaying box fields to show or hide; the default is to print only box title and name.

**Note:**

*If the Advanced Box Layout Editor was used in the chart, Hide secondary fields and Customize are not available.*

- Opens the *Wall Style Preview* Format toolbar in order to set top of chart, choose layout, move boxes, and more.

[Return to New for OrgPublisher 10](#)

[Return to Previewing and Printing Charts](#)

## Using the Smart Search Option

The toolbar [Quick Search Results](#) dialog can be used in a Smart Search option when you pin the search results into the *Search View*.

1. Type a single or multiple words or initials in the **Look For** toolbar field.
2. Click the Go button to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

A list of matching results displays in the *Quick Search Results* dialog below the toolbar, the characters entered for the search are in bold font.

3. Click the Pin button  in the dialog. The *Search View* opens, displaying the *Quick Search Results* list.

Once you pin the *Quick Search Results* into the *Search View*, OrgPublisher identifies this as the **Smart Search** mode by the "pushed in" appearance of the chevron button. Hover the cursor over the button to see a tooltip indicating how to switch to the **Advanced Search** mode.

4. You can select a record right away, or click the Details button to display more information for the shown results. Click the List button to return the display to just the found records. If you select the Detail button, the *Smart Search View* displays additional columns of data.
5. You can search further by typing additional letters to the original search and click Go.
6. Once you have selected the records you want, you can also select the **Groups** tab to save the search results as a group, send the results to Microsoft Excel, send the results to the clipboard to copy and paste into another application, place the results in the *Profile View*, and more.
7. When you have completed your **Smart Search** tasks, click the Search Mode button to return the *Search View* to its original display, or **Advanced Search**, as identified by the label when you hover over the button.

You can click the button again to return to the **Smart Search** mode.

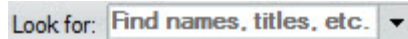
Return to New for OrgPublisher 10


Return to Searching for and Working with Groups

## Using the Toolbar Search with Quick Search Results

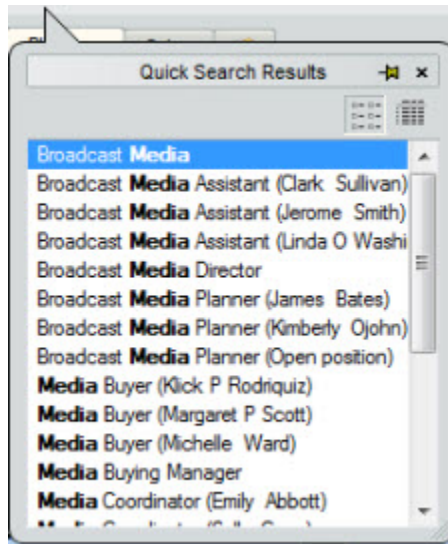
The simple toolbar search feature in the published chart has been modified to provide more detailed results.



1. Type a single or multiple words or initials in the **Look For** toolbar field.



2. Click the Go button  to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

A list of matching results displays in the *Quick Search Results* dialog below the toolbar, the characters entered for the search are in bold font.



3. You can select a record right away, or click the Details button  to display more information for the shown results. Click the List button  to return the display to just the found records.

- To reuse previous searches, click on the down-arrow and select the search item you want. To clear the search list, right-click on the button and select **Clear List**.

Return to New for OrgPublisher 10

Return to Searching for and Working with Groups

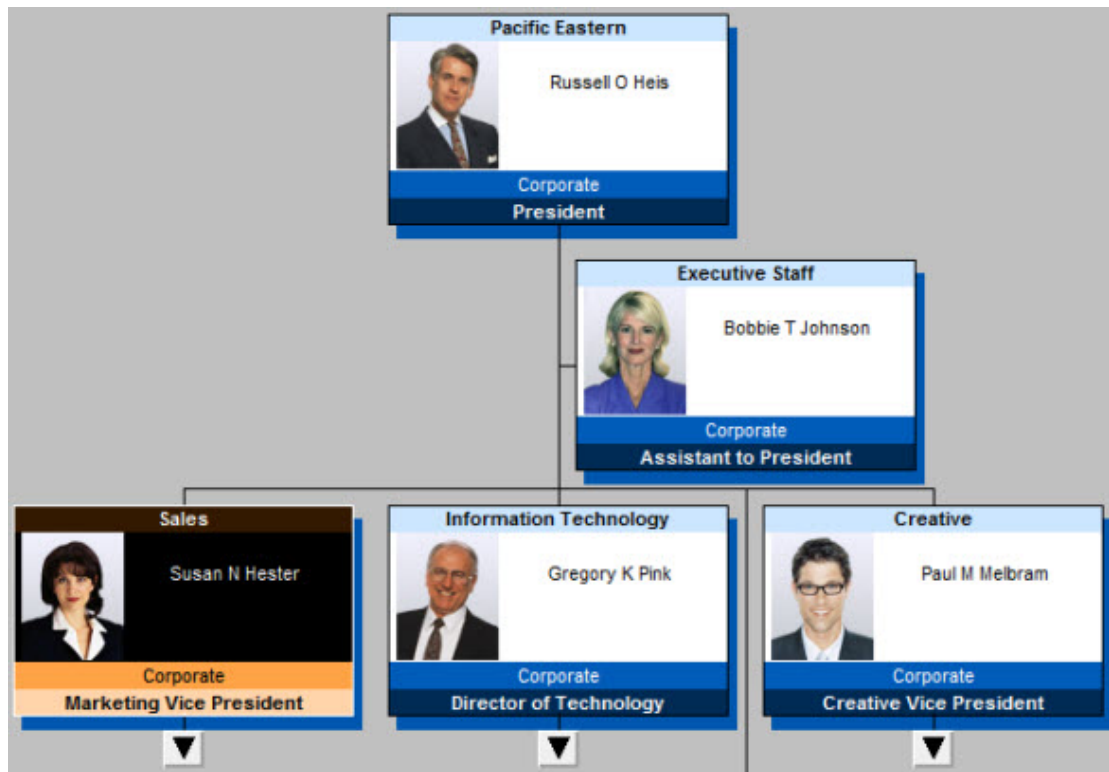
## Viewing a Chain of Command


### Note:

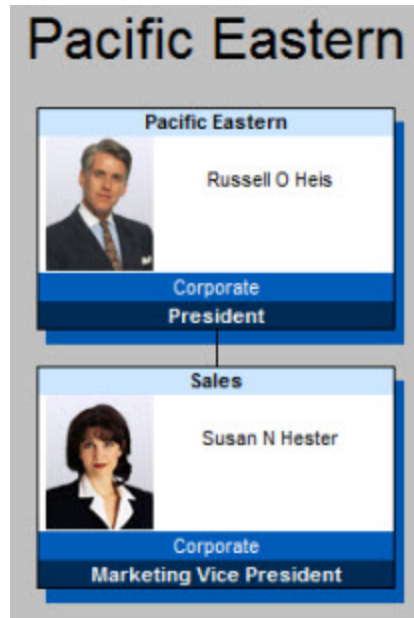
*This feature is not available in Modeling and Succession planning charts.*

The *Chain of Command* mode is available in the published chart using PluginX or EChart, including the published planning-enabled chart. It is not available in the modeling or succession planning published charts, as these charts are about reassigning responsibilities and positions.

- Select the chart box containing the person whose chain of command you want to see.



- The Display Chain of Command button  is enabled in the Main toolbar. Click the button to view the person's chain of command, the reporting hierarchy upward from this person in the chart.



The *Chart View* changes to display the selected person's chain of command from the selected box to the top of the chart.

**Note:**

*This view is affected by the number of levels shown. If the chain of command spans 3 levels, but the chart is set to display only two, just the first two levels in the chain of command are shown.*

3. Click the button again to re-display the whole chart. If the *List View* is open, the list changes to reflect the people in the boxes now displayed.

List View			
First name:	Last name:	Phone:	Email:
Russell	Heis	7999	Russell.Heis@
Susan	Hester	6999	Susan.Hester

Return to New for OrgPublisher 10

Return to General Chart and View Capabilities





## General Chart and View Capabilities

### Adjusting Column and Row Widths in Views

**Note:**

*This feature may have been disabled by the chart Administrator.*

- To resize a column or row width in the *List View*, *Profile View*, *Summary View*, or *Tree View*, place the cursor in the column or row heading on the line separating one column or row from the next. Click and hold down the left mouse button. The cursor changes appearance.
- Drag the column or row line to the width you want and release the mouse button. The column or row is resized.

Return to General Chart and View Capabilities

### Copying a Hyperlink to a Person in the Chart

Depending on how your administrator published your chart, you can copy the link to a person in the published chart **if you publish to and access the published chart from a server**. You can copy the link from the person's **Name**, **Job title**, or **Box title**.

1. Open the published chart and right-click on a person's name, the job, or the box title. A list of menu options appears.
2. Select the **Copy hyperlink to person** or **Copy hyperlink to box** option.
3. Open an application that can recognize and use hyperlinks, such as an email client, and paste the link into the application. The hyperlink text appears.

For instance, you can copy a link to a person in a chart, paste the link into an email message, and send the email to a supervisor who should review information in this person's chart box. The supervisor clicks on the link, and the chart opens at that person's location in the chart.

**Note:**

*If there are multiple people listed in a box, OrgPublisher opens the box and selects the first person listed.*

Return to General Chart and View Capabilities.

### Copying the Summary View

You can copy information from the *Summary View*  to other Microsoft Windows applications.

**Note:**

*This feature may have been disabled by the Administrator. Published real-time charts do not contain the summary reporting feature.*

1. Right-click in the *Summary View*.

2. Select **Copy Summary** from the options list. OrgPublisher highlights the summary information.
3. Open the Windows application and right-click to paste the summary in the new application.

Return to General Chart and View Capabilities.

## Embedding or Copying Charts

You can embed a chart in another COM automation-compliant document. You can also use *Previewing a Wall Style Chart to copy a modified chart*.


**Note:**

*This feature may have been disabled by the Administrator.*

*You can also copy the print preview into Microsoft PowerPoint, and open the search results in Microsoft Excel.*

1. Select a portion of the chart by highlighting a box or hierarchy of boxes.

2. Click the Copy button .

3. Open a Windows application and click the Paste button . A copy of the chart displays in the document.

Return to General Chart and View Capabilities.


## Going to the Top of the Displayed Chart

**Note:**

*This feature may have been disabled by the Administrator.*

You can return to the top of the current chart level in the *Chart View* after you have scrolled to a specific box or after you have performed a search.

- Select **View** from the menu bar, then **Go to top of displayed chart** from the pull-down menu.

- You can also use the Go to top of displayed chart button  from in the toolbar.

OrgPublisher displays the box at the top of the current drilling level and its reporting boxes.

Return to General Chart and View Capabilities

## Locating Information with the List View

**Note:**

*This feature may have been disabled by the chart Administrator.*

- To use the *List View* to locate information in the chart, click on the name, position or custom field in the *List View* that you want to find. The chart re-centers and the matching record is highlighted in the chart.
- To use the *Chart View* to locate information in the *List View*, click on the name, position, or field in the chart. The matching record is highlighted in the *List View*.


Return to General Chart and View Capabilities

## Locating Information with the Tree View

**Note:**

*This feature may have been disabled by the chart Administrator.*

You can use the *Tree View* to locate information in the *Chart View*, or to view chart information in an outline format.

If not already open, click the Tree View button  in the toolbar. The *Tree View* opens on the right-hand side of the chart window.

1. In the *Tree View*, select the person, job, or custom field you want to find in the chart.
2. Click on that person, job, or custom field.
3. The chart re-centers and the matching record is outlined in red in the *Chart View*.

Return to General Chart and View Capabilities

## Opening a Password Protected Chart

Depending on how your chart Administrator published your chart, you may be required to use a valid password to open it.

1. The *Enter Password* text box opens when you access a protected chart in your browser.

2. If you know the password to open the chart, type the password in the **Password** field.
3. If the **Remember my password** option is enabled and you want to open the protected file in the future without entering the password again, select this check box.
4. Click **Unlock** to open the chart.
5. If you do not have a password, click **Cancel** and contact the publisher of the chart you want to open.



Return to General Chart and View Capabilities

## Opening and Pinning the Styles View

**Note:**

*This feature may have been disabled by the chart Administrator.*

You can open and pin the *Styles View* while you work in the published chart if your Administrator has made more than one style available.

1. Click the Styles View button  to display the list of styles for the chart. The *Style View* opens on the left side of the OrgPublisher window.
2. Highlight a style from the list and click on the "pin"  in the upper right corner of the view. This makes the *Style View* easily accessible while you work.
3. When you close the *Style View*, an arrow displays to the right of the style name in the Style bar.

The Style bar also displays the group name, if groups exist in the chart, in the right-hand corner.

If enabled by your chart administrator, you can also view the styles list as tab options.

Return to General Chart and View Capabilities

## Selecting Drilling Options




Move up or down in the *Chart View* based on a specific hierarchical tree with these buttons. The **Custom Level** field determines how many levels display in the chart at one time. A button containing an arrow pointing downward moves down through the chart. If there are tiers of the chart above the viewed area, an arrow pointing upward moves toward the top.

**Note:**




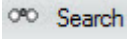

*This feature may have been disabled by the chart Administrator.*

1. To use drill-up and drill-down custom levels, first set the number of custom levels to display



2. Click on the Drill-up/drill-down button  to turn this feature on or off.
3. Scroll through the chart until you see the drill-down arrow .
4. Click on the arrow to move down the chart.
5. Click on the arrow pointing upward  to move back up the chart.

Other ways to navigate around a chart are:

- Find Next 
- Top of Chart 
- List View 
- Search 
- Scrolling 


Return to General Chart and View Capabilities

## Sending the Chart to Microsoft PowerPoint

You can copy the chart directly to Microsoft® PowerPoint, providing enhanced chart graphic quality and flexibility within presentations. All the information you can see in the OrgPublisher chart is sent to PowerPoint.

### Note:

*This feature disables the header and footer options, as well as the index or group icon legend for Book style. In addition, the page number circle drill buttons are not available for the copy to PowerPoint option.*

1. In the Main toolbar, click the Send to PowerPoint button . The *PowerPoint Preview* list box opens.
2. Select either the **Wall chart preview** or **Book style preview** radio button. Click **OK**. The *Microsoft PowerPoint Preview* window opens.
3. Make your modifications in the Wall style or Book style preview. If you click **Settings** in the *Book Style preview*, the *Book Style PowerPoint Settings* dialog opens. Follow the *Preview and Print a Book Style Chart* procedure to choose the PowerPoint settings.
4. Click **Send**. The *Send to PowerPoint* dialog opens.
5. In the **Page Range** section, select which pages you want to send to PowerPoint, **Current Page**, **All Pages**, or **Pages**, and enter the page numbers or range.

6. In the **Chart Options** section, select the optional chart features you want to send to PowerPoint. These features include **Show Drill Buttons**, **Chart Title**, which allows you to choose **Title is part of image** or **Title is part of slide**, and **Chart Background**, which allows you to choose **Background is part of image** or **Background is part of slide**.
7. In the **PowerPoint Options** section, the default is **Use currently open presentation**. Clear this check box if a current presentation does not exist or you want to choose a different presentation.
8. In the **Image Options** section, select **Copy as metafile** or **Copy as bitmap**.
9. Click **OK** once you have selected all the options you want to use. Microsoft PowerPoint opens with the chart embedded in the slides.

**Note:**

*When previewing as Wall Chart the Show Drill Buttons option is not available.*

Return to General Chart and View Capabilities

## Setting the Top of Chart

You can select any box you wish as the top of the chart using this button. Head counts for the chart are set to only reflect the count from the selected top of chart box down.

**Note:**

*This feature may have been disabled by the Administrator.*

1. To set the top of chart, select the box that you want to see at the top of the *Chart View*.

2. Click the Set top of chart button .

3. The chart repositions to center the *Chart View* using the new top of chart.


4. To view the whole chart again, click the Display Whole Chart button .

Return to General Chart and View Capabilities

## Sorting the List View

**Note:**

*This feature may have been disabled by the chart Administrator.*

1. Open the *List View* by selecting **View** from the Main menu then **List View** from the options list. You can also click the List View  button in the toolbar.
2. Click on the column heading that you want to sort by.

3. Click on the heading for a numeric field, such as telephone number, to sort the list numerically, or on a date column to sort the list by date. The date format must be **YYYY/MM/DD**.

In addition, the **Search View** is available within the *List View* and offers features much like the *Search* dialog.

*Columns shown in the List View determine the columns shown in the Search View.*

Return to General Chart and View Capabilities

### Understanding Profile View Subheadings

Depending on your chart administrator, you may see subheadings in the *Profile View*. Subheadings help organize data fields for better viewing and understanding.

Open the *Profile View*, if available, in your chart.



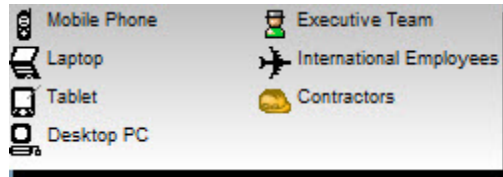
The *Profile View* displays subheadings, indented one space, with corresponding fields indented two spaces and listed beneath the subheadings. Subheadings group information of the same type for a quicker grasp of available data.

You can also view subheadings as tab options.

Return to General Chart and View Capabilities

## Understanding the Chart Legend


The Chart Legend tells you what the icons and colors used in the chart mean.




Each icon is accompanied by the name of the associated group. Custom colors can also be displayed with a label describing how they are used in the chart.

Return to General Chart and View Capabilities

## Using Click and Drag Scrolling

When the mouse cursor sits over a blank area in the *Chart View*, the cursor changes to a hand icon . Using the click and drag scrolling feature is another way to navigate through a large chart. This option is always enabled and cannot be turned off.

- Click and hold down the mouse button. The hand closes  and allows you to scroll through the displayed chart levels by dragging or moving the mouse wheel in the direction you want the *Chart View* to move.

For instance, if you want to see the bottom of a chart level, you want the *Chart View* to move up. Click the hand in the background of the view and drag upwards.

### OrgPublisher Scrolling Enhancement

Chart scrolling is now updated with more of an iPod® scrolling feel. As you drag to move a chart, it will appear more as a “toss.” As you release the mouse, the chart continues to move with a gradual slow down to its new position.

Return to General Chart and View Capabilities

## Using OrgPublisher in Accessibility Mode

The OrgPublisher PluginX chart (versions 5 and later) can be accessed by JAWS® for Windows screen reading software for the blind and visually impaired (End User Accessibility).

**Note:**  
*This feature may have been disabled by the chart Administrator.*

The following functions are supported in the PluginX chart via the keyboard.

Functions	Keyboard command	Description
Find	<b>F key</b>	Opens the <i>Enter Search text</i> dialog. This is equivalent to an <b>All fields</b> search; for example, type a first or last name, or a job or box title. Press the space bar or <b>Enter</b> to begin the find, or press <b>TAB</b> to the <b>Cancel</b> button.
Find Next	<b>N key</b>	Performs a "find next" matching record function if a previous search occurred.
Zoom in	<b>Ctrl+</b>	Raises the zoom factor by one level.
Zoom out	<b>Ctrl-</b>	Lowers the zoom factor by one level.

**Note:**  
*JAWS hot keys, such as **F** for the next form field and **L** for the next list, are disabled. OrgPublisher PluginX accessible charts do not contain form fields, lists, links or tables. If you use a high zoom-in level, you may notice JAWS takes a little longer to read the screen.*

You can navigate through the chart using the **Up**, **Down**, **Left** and **Right** arrow keys on your keyboard. The Drill-up:Drill-down to another level function occurs automatically.


- When a chart is opened, the top box is automatically selected.
- A box must always be selected. Drilling on "white space" will not de-select the current box.
- Only one box is selectable at a time. Hierarchical "trees" are not available.
- To access a sibling of a selected top box with a drill-up button, click the up arrow first, then the left or right arrow. If the requested sibling does not exist, the original box will remain selected.
- If JAWS is running and you tab away to another application, the focus on the chart may be lost. To regain focus, press **Alt TAB** to go to another application and then press **Alt TAB** again to refocus on the chart.

Return to General Chart and View Capabilities

## Using the Symbol Indicators in Tree View

You can use the *Tree View* to locate information in the *Chart View*, or to view chart information in an outline format, if your Administrator has made the *Tree View* available in the published chart. Symbols in the *Tree View* indicate whether additional chart components are available for viewing, or that a branch is collapsed into summary format.



Open the *Tree View* by clicking the Tree View button  in the toolbar. If you do not see this button, this view has not been made available by the chart Administrator. The *Tree View* opens on the right-hand side of the chart window.

Symbols used in the *Tree View*, their function and locations are:

<b>Symbol</b>	<b>Function</b>	<b>Location on the Tree</b>
+	A component is collapsed and can be expanded to show more components by clicking on the plus sign	Corner of the branch connected to the chart component
-	A component is expanded and can be collapsed by clicking on the minus sign	Corner of the branch connected to the chart component
>	More boxes are available for display by double-clicking the box containing the greater-than sign	Chart box

Return to General Chart and View Capabilities

## Viewing Information in the Profile View


**Note:**

*This feature may have been disabled by the chart Administrator.*

1. Open the *Profile View* in the chart by clicking the Profile button .





2. Click on a name in the *Chart View*. The *Profile View* changes to display information associated with the selected name.
3. Click the Profile View button  again to close the view.

You can also use the tabbed *Profile View*.

Return to General Chart and View Capabilities

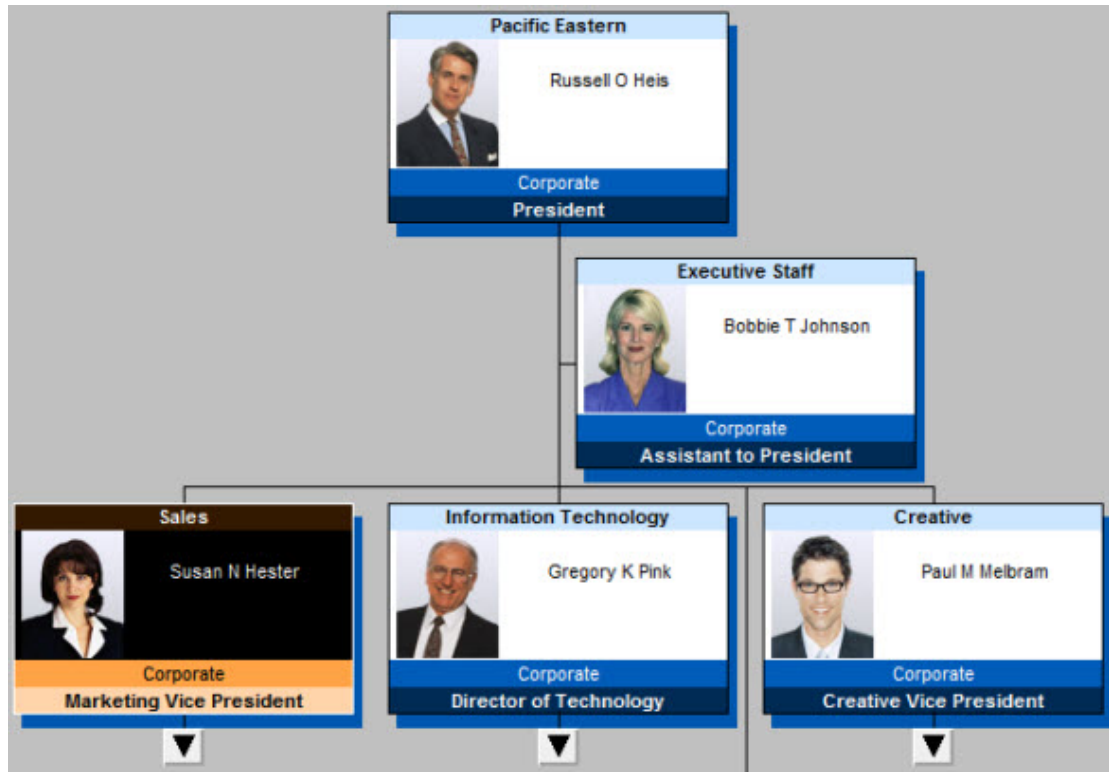
## Viewing a Chain of Command


### Note:

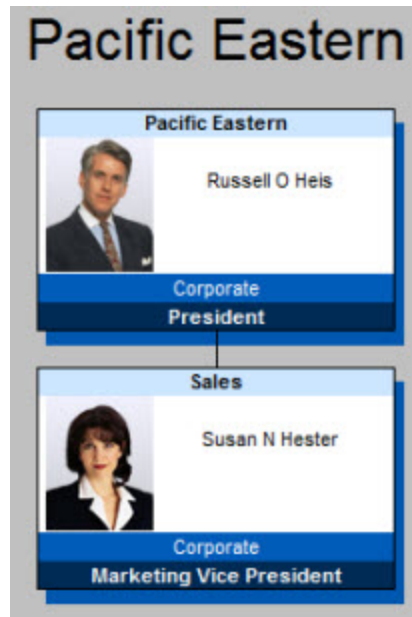
*This feature is not available in Modeling and Succession planning charts.*

The *Chain of Command* mode is available in the published chart using PluginX or EChart, including the published planning-enabled chart. It is not available in the modeling or succession planning published charts, as these charts are about reassigning responsibilities and positions.

1. Select the chart box containing the person whose chain of command you want to see.



2. The Display Chain of Command button  is enabled in the Main toolbar. Click the button to view the person's chain of command, the reporting hierarchy upward from this person in the chart.

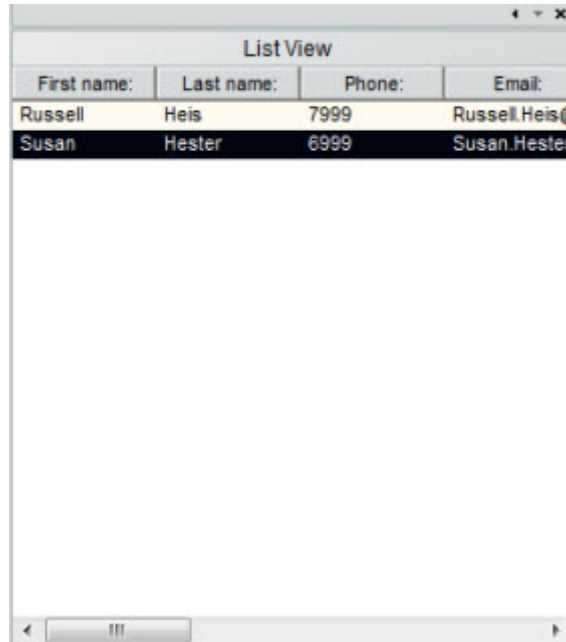


The *Chart View* changes to display the selected person's chain of command from the selected box to the top of the chart.

**Note:**

*This view is affected by the number of levels shown. If the chain of command spans 3 levels, but the chart is set to display only two, just the first two levels in the chain of command are shown.*

- Click the button again to re-display the whole chart. If the *List View* is open, the list changes to reflect the people in the boxes now displayed.



List View			
First name:	Last name:	Phone:	Email:
Russell	Heis	7999	Russell.Heis@
Susan	Hester	6999	Susan.Hester

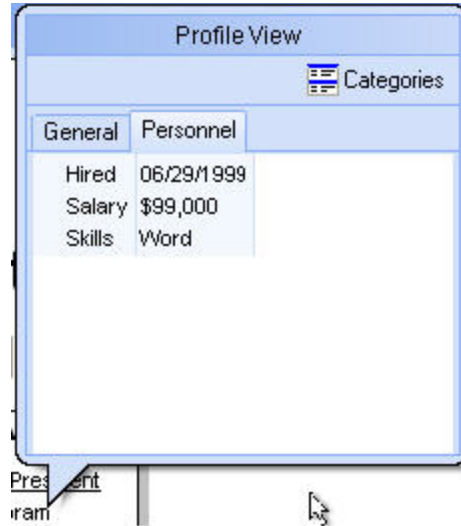
Return to New for OrgPublisher 10

Return to General Chart and View Capabilities

## Viewing the Hover Profile

The *Hover Profile* is a quick way to view the most important employee information without opening the *Profile View*. The pop-up profile is anchored to the upper right or, depending on the location in the *Chart View*, the upper left, of the data element that the mouse is over.

- Move the mouse cursor over a data element in the chart, a person, a job, or a box title, and let it hover there. The *Hover Profile* opens.  
A vertical scroll bar is available if the number of displayed fields requires it. The *Hover Profile* displays the selected chart color scheme. Depending on your chart administrator, the profile may also contain subheadings with associated fields listed beneath the heading.



2. When you have finished reviewing the information in the *Hover Profile*, click some where else in the chart to close it.

If enabled by your Administrator, you can also view the tabbed *Hover Profile*.

Return to General Chart and View Capabilities

## Viewing the Matrix Reporting Hover Display

**Note:**

*This feature may have been disabled by the chart Administrator.*

1. Open a chart that contains multiple relationships/matrix reporting icons.
2. Move the mouse cursor over the matrix reporting icon in a box. The Matrix reporting hover display appears, listing that person and all report to instances.
3. You can move the cursor to close the hover display, or you can pin the matrix reporting hover display to the *Search View* by clicking the Pin button .



Return to New for OrgPublisher 10

Return to General Chart and View Capabilities

## Searching for and Working with Groups

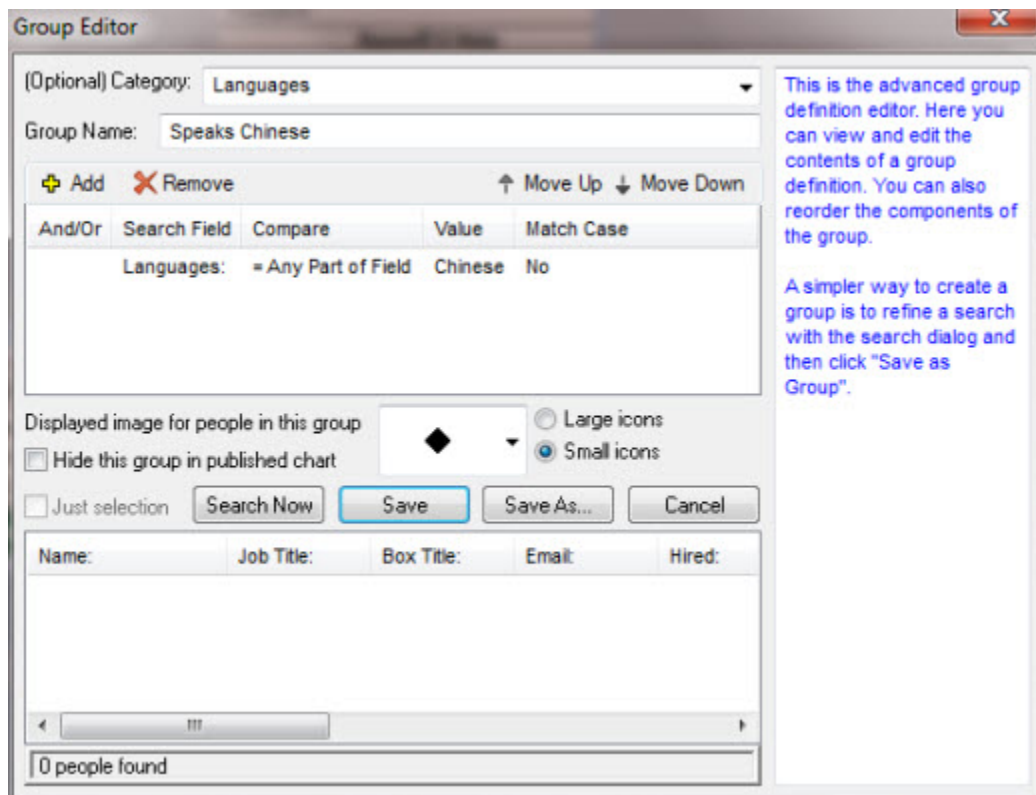
### Adding a Group Category

You can now add group categories to your chart in order to classify groups with a common theme, such as, for a global company, groups by country or HR items like retirements or ethnicity.

1. Open the **Groups** tab of the *Search* dialog by clicking the Groups button  in the toolbar, or by clicking the Advanced Search button  **Search** and selecting the **Groups** tab.
2. Double-click on a group name for which you want to create a category. The *Group Editor* dialog opens.
3. In the optional **Category** field, type the name of the category you want to add. The category name appears in the **Search Field** of the record displaying the selected group criteria.

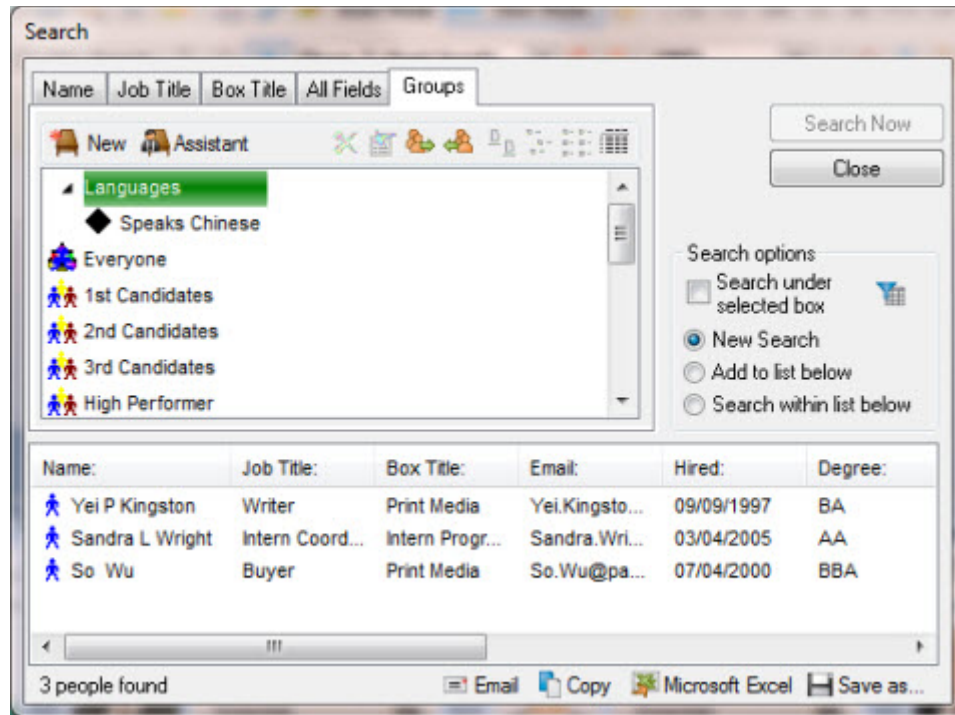
**Note:**

The category name is not a searchable field. The **Value**, or group name, is the searchable field.

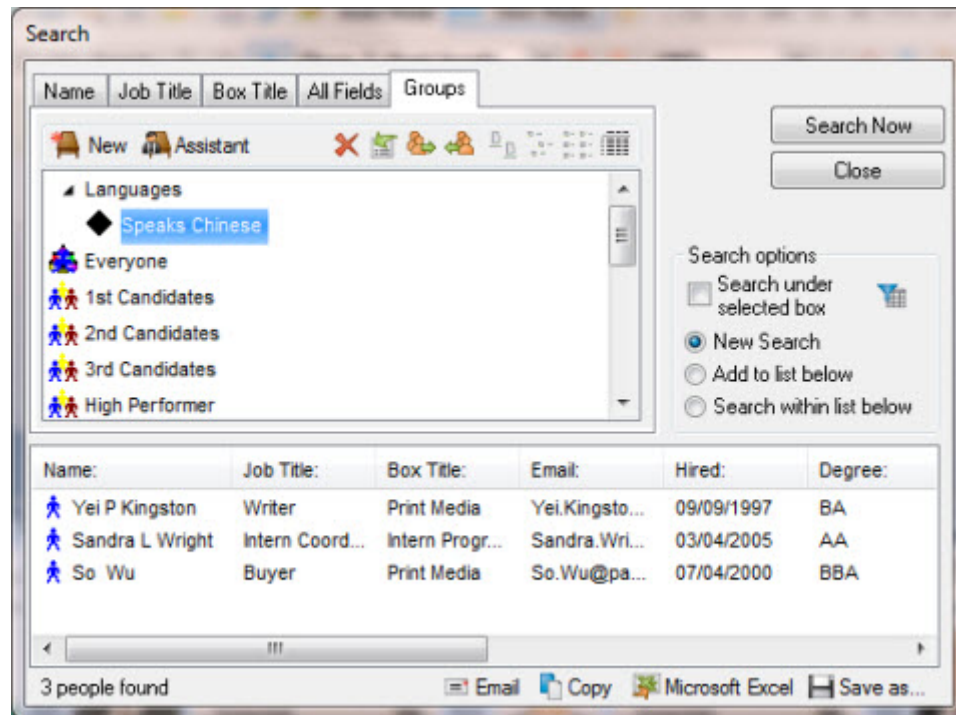


And/Or	Search Field	Compare	Value	Match Case
	Languages:	= Any Part of Field	Chinese	No

4. Click **Save**. The **Groups** tab re-displays with the new category name, and the group name indented below it. When selected, the **Category** name is highlighted in green.



When selected, the **Group** name is highlighted in blue.

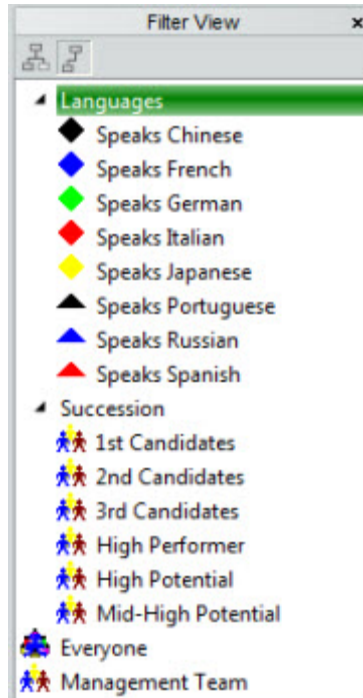


- Repeat steps 2 - 4 to add additional categories.

If you want to use an existing category, click the drop-down arrow in the **Category** field and select the name you want to use.



The *Filter View* displays the groups indented below the associated category name. The *Filter View* list first displays the category names in alphabetical order, then the associated group with the category name in alphabetical order, then the groups without categories in alphabetical order.



Return to *New for OrgPublisher 10*


Return to Searching for and Working with Groups

## Adding a New Group to the My groups Tab

You can add a new group to your chart by searching for select criteria and saving the results as a group.

### Note:

*Published real-time charts do not provide the **My groups** feature.*

1. Conduct your search using one of the *Search* dialog tabs in the or by using the **Search View** pane in the *List View*.
2. When your search result is the way you want it, click . The *Enter a group name* text box opens.
3. Type the name of the group. Click **OK**. The *Search* dialog or *Search View* displays the **My groups** tab which includes the new group.

## Adding a group using the right-click menu

1. In the *Chart View*, select the name of the person you want to add to a new group.
2. Right-click on the person's name. The *Select a Group* text box opens.

3. Click **New Group**. The *Enter a group name* text box opens.
4. Type the name for the group. Click **OK**. The text box closes and the new group is created and the name is added to the *Groups View*.

Return to Searching for and working with Groups

## Adding a Person to a Group in the My groups Tab

You can add a person to a group directly from the *Chart View*.

**Note:**

*Published real-time charts do not provide the **My groups** feature.*

1. In the *Chart View*, select the name of the person you want to add to an existing group.
2. Right-click on the person's name and select the **Add person to the Group** option. The *Select a Group* text box opens.
3. Click the down-arrow and select a group from the drop-down list.
4. Click **OK**. The text box closes and the person is now included in the selected group.

Return to Searching for and working with Groups

## Deleting a Group from the My groups Tab

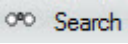

**Note:**

*Published real-time charts do not provide the **My groups** feature.*

You can delete a group only from the **My groups** tab. The general groups are not editable, except to search.

**Note:**

*There is no warning message when you delete a group. Please verify you have the correct group before you click the delete button.*



1. Open the **Search View** pane in the *List View*. You can also click on the Search button  in the toolbar.
2. Select the **My groups** tab.
3. Click once on the group you want to delete.
4. Click on the Delete Group Definition button . The group is immediately deleted from the existing groups.

Return to Searching for and working with Groups

## Editing a Group Definition in the My groups Tab

### Note:

*Published real-time charts do not provide the **My groups** feature.*

1. Click the Search  **Search** button in the toolbar or open the **Search View** pane in the *List View*. Click the **My groups** tab.
2. Click the Edit Group Definition button  to open the *Group Editor* dialog.
3. To add search criteria, click **Add** to copy the last criteria line, then modify it by using the **And/Or**, **Search Field**, **Compare**, **Value**, and **Match Case** fields. Select the values in each field and choose the option you want to use from the drop-down list.
4. When you have added all the search criteria, click **Search Now** to conduct the search. If you are modifying an existing group, the results are added to that list. If you are creating a new group, the matching records display in the results pane.
5. To delete an existing group criterion, highlight the record and click **Remove**.
6. Save the changes to an existing group by clicking **Save**. Save to a new group by clicking **Save As**.
7. You can continue to build criteria for additional groups or click **Cancel** to close the *Group Editor* dialog and return to the *Search View*.

Return to Searching for and working with Groups

## Exporting and Importing Groups from the My groups Tab

### Note:



*Published real-time charts do not provide the **My groups** feature.*

In order to import a group successfully, the number, type, and order of custom fields in the chart receiving the import must match exactly the number, type, and order of custom fields in the chart from which the group was exported. The **Everyone** group cannot be exported or imported.



If duplicate group names are imported, OrgPublisher will append the name with a number, 1, 2, 3, etcetera. No groups are overwritten by the import process.

When exporting groups that reference other groups, verify that they reference the correct group. If a referenced group is not included in the import, the affected group will not be imported and an error message displays.

### Export a Group

1. Open the **Search View** pane in the *List View*, or click the Search button  **Search** in the toolbar. Click on the **My groups** tab to view the group names.
2. Click the Export groups button . The *Select Groups to Export* dialog opens.
3. Click **Select all** if you want to export all of the groups. You can clear the check boxes for groups you do not want to export, or you can click **Clear all** to clear all the listed groups.
4. Type or **Browse** to the file into which you want to export your groups, such as a file in your network drive. Type a name for the group files and click **Open**. The file extension is **OCG, Group Data Files**.
5. Click **Export** to send the groups to the selected file. A message displays to let you know if your groups were successfully exported.

## Import a Group

1. Open the **Search View** pane in the *List View* , or click the Search button  **Search** in the toolbar. Click on the **My groups** tab to view the group names.
2. Click the Import groups button . The *Select Groups to Import* dialog opens.
3. Type or **Browse** to the file from which you want to import your groups. The names of the groups in the selected file display.
4. Click **Select all** to import all of the displayed groups to your PC. You can clear the groups you do not want to import or click **Clear all** if there are many groups and you want to select just a few.
5. Click **Import**. A message states that your groups have been successfully imported. The selected groups display in your **My groups** tab.

Return to Searching for and Working with Groups

## Opening a Selected Group in the Chart View

**Note:**

*This feature may have been disabled by the chart Administrator.*

Your chart may contain several groups. OrgPublisher displays only one group at a time, but you can quickly select and open another.

1. Click on the group label in the Style Bar. The *Filter View* opens.
2. Click on the group you want to view. The *Filter View* closes, and your selected group hierarchy displays in the *Chart View*.

Groups can be created by end users in the published chart using the *Search View*.

Return to Searching for and Working with Groups

## Removing a Person from a Group in the My groups Tab

You can remove, or delete a person from a group by using the right-click menu in the *Search View*.

**Note:**

*Published real-time charts do not provide the **My groups** feature.*

1. Open the *List View* and click on the **Search View** pane.
2. Click on the **My groups** tab and select the group you want to modify. The group members list displays in the lower pane.
3. Right-click on the name of the person you want to delete from the group.
4. Select **Remove person from group** from the options list. The name is deleted from the group.

**Note:**

*There is no "Undo" option for this process. If you remove a person in error, you can locate them in the chart and add them back into the group.*

Return to Searching for and working with Groups

## Saving Side-by-side Profiles as Groups

You can create groups from the displayed and pinned [side-by-side profiles](#).

1. Select the profiles you want to use as a side-by-side profile then click on the **Save the current set of people as a new group** button. The *Group Editor* dialog opens.
2. The default **Group Name** displays as **Profile Group**. You can keep this name or type over it with the name you want to use.
3. Click **Save**. The *Group Editor* dialog closes and the new group is included in the *Groups View*. You can select the group name from the *Groups View* to display the selected people in the *Chart View*.

Return to Working with Succession Planning

Return to Searching for and Working with Groups

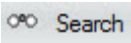
## Searching Charts

**Note:** *Published real-time charts provide single field searching capabilities; complex or group searching and saving **My groups** are not available.*

You can search your org charts to locate information using the *Search* dialog or the Search View. You can specify the chart component, field, and text for which you want to search. The *Search* dialog and *Search View* include a "Sounds Like" feature to increase your chance of a successful search for a text field.

Searches can be case-sensitive and can match all or a part of the field. You can search a portion of the chart or the entire chart for employee names, job titles, or box titles. The availability of the search feature is dependent upon the publishing format and options chosen by your chart Administrator.

You can also view the search results list in Microsoft Excel.

1. Click on the Search button . The *Search* dialog opens at the **Name** tab.
2. If the word you are looking for is part of a job title, select the **Job Title** tab, etc. If you select the **Groups** tab, click on the group and then select **Search Now**. The following steps apply to **Name**, **Job Title**, **Box Title**, and **All Fields** searches.
3. Type the text for searching. If you have selected a specific box in the *Chart View*, the *Search* dialog selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
4. Click on the **Match** drop-down arrow and select how you want the data to be matched. Choices will vary based on the type of data you are searching.



The drop-down list indicates where in the field to search. The options are:

1.
  - Any Part of Field
  - Match Whole Field
  - Start of Field
  - Sounds Like

As an example, the **Box Title** is searched for the word "Clerical."

2.
  - If **Any Part of Field** is selected, job titles such as Clerical Assistant, Assistant Clerical Manager, and Director of Clerical Services are found.
  - If **Match Whole Field** is chosen, only job titles that consist of the word "Clerical" are found.
  - If **Start of Field** is selected, only job titles that begin with the word Clerical are found.
  - The **Sounds Like** option is available for text fields only. For instance, if "clricl" was typed in as the search word, only job titles that consist of the word "Clerical" are found.

5. Select **Match Case**, if applicable.
6. Click **Search Now**.
7. A list of all matching records displays in the Search results area in the lower pane. You can:

6.
  - Sort any column in the search results.
  - Click on any record and OrgPublisher will locate that person within the chart.
  - If you have selected a specific box in the *Chart View*, the *Search* dialog automatically selects the **Search under selected box** check box.
  - Click on Copy List to Clipboard button  and then paste the list into any other Windows application.
  - Click on Save as Group button  to create a group in the **My groups** tab. This group is available only in the published chart.
  - Select **Add to list below** in the **Search options** section to conduct a secondary search against these results.
  - Select **Search within list below** in the **Search options** section to add additional search results to the list.

If you chose to **Add to the list** or **Search within the list below**, follow these steps to refine the first search result.

6.
  1. Select the appropriate tab to start the secondary search.
  2. Key in search criteria and match options.

3. Click **Search Now**.
4. Your search results list will be modified.

In the following search, the 3 original records for **Operations** was reduced to 1. This represents 1 **Operations** staff position is an open position.

7. Click **Close** to exit the *Search* dialog.

You can also [Use the Smart Search Option](#) in the *Search View*.

Return to Searching for and working with Groups

## Sending Email to a Group in the My groups Tab


### Note:

*Published real-time charts do not provide the **My groups** feature.*

If the Administrator associated an email address to a job, box, or name in the chart, and groups exist in the chart, you can send an email message to a group.

### Note:

*OrgPublisher defaults the maximum number of email addresses to "20." Your chart Administrator may override this number to make it more or less than the default.*


1. Open the **Search View** pane of the List View.
2. Click the **My groups** tab and select the group you want to send an email to. (You can also select your search criteria to create and save a group for your email message.)
3. Click Send email to everyone in group button . OrgPublisher opens your email client and displays the email addresses in the **To** field.
4. Type your message and send the email in the normal method.



### Note:

*OrgPublisher looks for the first custom field of Email type when sending email to a group. If you decide to use more than one email address in your chart, the primary email must be first in the custom field sequence order.*

Return to Searching for and Working with Groups

## Spotlighting Search Results or Groups in the Chart View

You can use the Chart Spotlighting feature to highlight search results in the *Chart View*, or dim boxes that are not part of the search result by clicking the Highlight search results in chart button  in the *Search View*.

1. Open the *Search View*.
2. Select the search criteria and click **Go** to begin the search.
3. When the search results display in the *Search View*, click the Spotlight search results in chart button . The boxes in the *Chart View* that are not part of the search results are dimmed.
4. If you want to spotlight a specific group in your chart, click on the **Groups** or **My groups** tab in the *Search View*. You can spotlight any group except the **Everyone** group. Select the group and click the Spotlight search results in chart button . The group is spotlighted in the chart.

5. Click the button again to disable the spotlight search results feature.

**Note:**

*When printing a chart with the spotlighting feature enabled, if your printer does not support AlphaBlend, your printed chart will show all boxes as in the past. See your IT administrator if you have any questions.*

Return to Searching for and Working with Groups

## Using the My groups Tab in the Search Dialog

**Note:**

*This feature may have been disabled by the chart Administrator.*

Not only can you search for information in a published chart, you can also save the search results as a group. Groups saved by end users are displayed in the **My groups** tab of the *Search View* in the published chart.






You can search for and create a group using the *Search View* in the same way you can use the *Search* dialog.

The **Everyone** group, the OrgPublisher default, automatically displays in the **My groups** tab.

**Note:**

*When working with a very large chart, you can add new groups, but the existing groups cannot be modified or deleted. The new group cannot be displayed in the Chart View.*

1. Open a published chart in your browser.
2. Open the *List View* and select the **Search View** pane. Three tabs are available, **Search**, **Groups** and **My groups**. The **Search** tab enables you to search for specific information in the chart. You can copy the results list or save the list as a group. The **Groups** tab displays the groups created by the OrgPublisher Administrator before publishing the chart. The **My groups** tab displays all groups saved by you, the end user, plus the default **Everyone** group.
3. If you haven't already done so, conduct your search using the *Search View*.
4. When your search result is the way you want it, click **Save as Group**. The *Enter a group name* dialog opens.
5. Type the name of the group and click **OK**. The **My groups** tab opens and displays the new group name. Several buttons are also available.

The New Group Definition button  opens the *Group Editor* dialog to add a new group definition. The Delete Group Definition button  deletes a selected group, and the Edit Group Definition button  opens the *Group Editor* dialog to edit an existing group definition. If you must change computers, the export  and import  buttons enable the transfer of end user groups from one machine to another. See the [Exporting and Importing Groups](#) procedure for details.

6. To display a specific group in the published chart, open the *Filter View* by clicking on the groups label in the OrgPublisher Style bar.




Return to Searching for and Working with Groups

## Viewing Search Results in Microsoft Excel

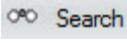
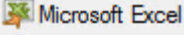

**Note:**

*This feature may have been disabled by the chart Administrator.*

You can open and view your search results list directly in Microsoft® Excel. All the information you can see in the results list in OrgPublisher is copied into Excel.

1. Open the *List View*  in the chart.
2. Select the **Search View** pane.
3. Conduct the search you want, or sort the records as needed. Click the Microsoft Excel button  at the bottom of the view. Microsoft Excel opens with your chart records list.
4. You can also open the **Groups** or **My groups** tab in the *Search View*, select a group, and click the Microsoft Excel button  to open the group list in Microsoft Excel.


### Open your search results from the *Search* dialog in Microsoft Excel.

1. Open the *Search* dialog by clicking the Search button  in the toolbar.
2. Conduct the search you want then click the Microsoft Excel button . Microsoft Excel opens with your search results list.
3. You can also open the **Groups** or **My groups** tab in the *Search* dialog, select a group, and click the Microsoft Excel button  to open the group list in Microsoft Excel.

Return to Searching for and working with Groups

### Using the Smart Search Option



The toolbar [Quick Search Results](#) dialog can be used in a Smart Search option when you pin the search results into the *Search View*.

1. Type a single or multiple words or initials in the **Look For** toolbar field.
2. Click the Go button  to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

A list of matching results displays in the *Quick Search Results* dialog below the toolbar, the characters entered for the search are in bold font.

3. Click the Pin button  in the dialog. The *Search View* opens, displaying the *Quick Search Results* list.

Once you pin the *Quick Search Results* into the *Search View*, OrgPublisher identifies this as the **Smart Search** mode by the "pushed in" appearance of the chevron button. Hover the cursor over the button to see a tooltip indicating how to switch to the **Advanced Search** mode.

4. You can select a record right away, or click the Details button  to display more information for the shown results. Click the List button  to return the display to just the found records. If you select the Detail button, the *Smart Search View* displays additional columns of data.

5. You can search further by typing additional letters to the original search and click Go.
6. Once you have selected the records you want, you can also select the **Groups** tab to save the search results as a group, send the results to Microsoft Excel, send the results to the clipboard to copy and paste into another application, place the results in the *Profile View*, and more.
7. When you have completed your **Smart Search** tasks, click the Search Mode button to return the *Search View* to its original display, or **Advanced Search**, as identified by the label when you hover over the button.

You can click the button again to return to the **Smart Search** mode.

Return to New for OrgPublisher 10


Return to Searching for and Working with Groups

## Using the Toolbar Search with Quick Search Results

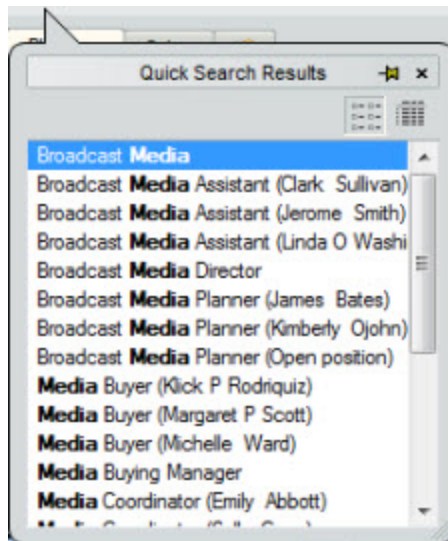
The simple toolbar search feature in the published chart has been modified to provide more detailed results.



1. Type a single or multiple words or initials in the **Look For** toolbar field.



2. Click the Go button  to begin the search navigate around the chart; this feature searches on a box-to-box basis for the next instance of a matching record.

A list of matching results displays in the *Quick Search Results* dialog below the toolbar, the characters entered for the search are in bold font.



3. You can select a record right away, or click the Details button  to display more information for the shown results. Click the List button  to return the display to just the found records.
4. To reuse previous searches, click on the down-arrow and select the search item you want. To clear the search list, right-click on the button and select **Clear List**.

Return to New for OrgPublisher 10

[Return to Searching for and Working with Groups](#)




## Previewing and Printing Charts

### Creating and Editing a Book Style Page Customization List

You can create a list of boxes to print at the top of pages in your Book Style printed chart.

**Note:**

*This feature may have been disabled by the chart Administrator.*


1. In the *Chart View*, right-click on a name or box you want as the top of a page in your Book Style printed chart. **This box must be a hierarchically logical box**, such as a manager's box. An assistant's box cannot be selected as the top of a page.
2. Select **Top of page (Book style printing)** from the options list. When you open the *Book Style Print Preview*, the selected box displays at the top of the page for the selected hierarchy.
3. Select **File** from the menu and **Print preview** from the pull-down list. The *Print Preview Type* list box opens. You can also click the Print Preview button  in the toolbar.
4. Select the **Book style print preview** radio button and click **OK**. The *Book Style Print Preview* window opens.
5. Click **Settings**. The *Book Style Print Settings* dialog opens.
6. Select **Page customization list**. The *Book style page customization list* text box opens.
7. You can remove a name, or any other customized page, from the customization list by selecting the corresponding check box then clicking **Remove selected items**. The name is removed from the list and that customized page no longer displays in the preview pane.
8. Click **OK** to accept the changes or **Cancel** to discard the changes.

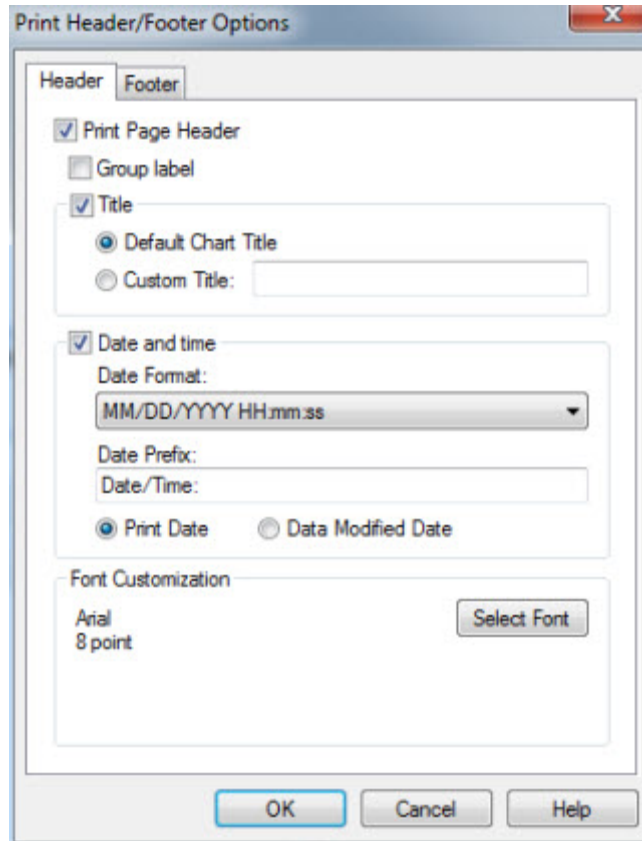
[Return to Previewing and Printing Charts](#)

### Customizing Header and Footer Information

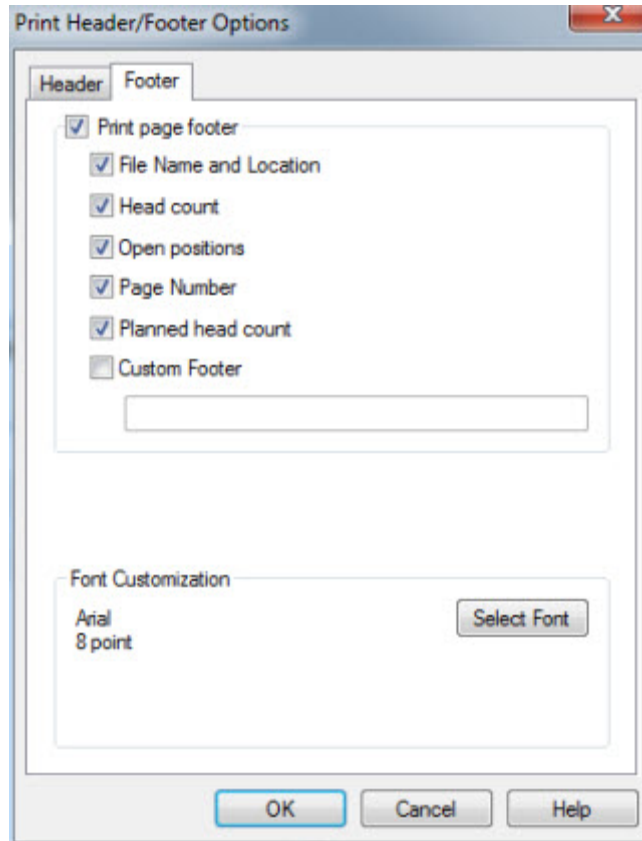
The Header/Footer print option enables you to display a **Group label**, modify the chart **Title**, and the printed **Date and time** in the header, as well as select data to display in the footer such as head count, number of open positions, and the file name and location.

You can also customize font information, such as type, size and color, for both header and footer in a printed OrgPublisher chart. Customized footers print above any other existing footer information.

1. Click on the Print button  in the toolbar. The *Print Wizard* opens.
2. If multiple views appear in the chart, select the view you want to print. Click **Next**.
3. Select either the **Wall Chart** or **Book Style** radio button. Click **Next**. If you selected **Wall Chart**, proceed to Step 5.
4. If you selected **Book Style**, complete your selections in the *Settings* dialog. Click **Next**.
5. Click **Header/Footer** to open the *Print Header/Footer Options* dialog.



6. Make your selections in both the **Header** and **Footer** tabs, such as **Date and time**, **Group label**.



7. The **Font Customization** section, in both tabs of the dialog, displays a sample of the current font used for the printed chart. You can change the font for either the header or footer, or both. Click **Select Font**. The *Font* dialog opens.
8. Select the **Font**, **Font style** and **Size** for your text. Your selection displays in the **Sample** pane of the dialog.
9. You can also choose **Effects**, such as **Underline** or **Color**.
10. When you have made your selections, click **OK** to accept your changes and close the *Font* dialog.
11. Click **Finish**. Your system *Print* dialog opens.
12. Verify the print settings and print your chart.

Return to Previewing and Printing Charts

## Previewing and Printing a Book Style Chart

You can preview charts before printing them to check how the chart fits on the pages. The *Chart View* is the only view you can preview. The *Print Preview* window enables you to fine-tune a chart for printing; for instance, by moving boxes or a selection of boxes or changing the chart layout.

Using the toolbar, you can change box layouts, change layouts and zoom in or out. You can set a specific row size or select optimization settings.

If you have **Print Wizard** selected in the **Print Options**, and you select **File, Print Preview**, the *Print Preview Type* dialog opens, requiring a selection of either *Book style print preview* or *Wall chart preview*. The default selection is the preview type you used last.

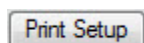
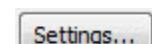
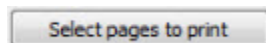
**Note:**

If you choose to print a chart legend in your org chart, it does not display in the Book Style Print Preview. It does, however, print.

1. Select **File** from the menu bar, then **Print Preview** from the pull-down menu. You can also click on the Print Preview button  in the toolbar. The *Print Preview Type* dialog opens.
2. Select **Book style print preview** radio button and click **Show Preview**. The *Book Style Print Preview* dialog opens and the chart displays as it will print on each page. The top pane displays thumbnails of each page. The lower pane displays the selected page. The *Book Style Print Preview* enables you to format individual pages. Each page is displayed in a thumbnail.
3. The *Print Preview* Menu bar contains buttons that enable you to print, modify your Book Style print settings, or cancel the preview.

**Button**




**Action Performed**

	Click this button to print the chart. This button opens your system <i>Print</i> dialog.
	Click this button to open the system <i>Print Setup</i> dialog in order to select the printer device, paper size, orientation, and source.
	Click this button to open the <i>Book Style Print Settings</i> dialog. You can also access the <i>Print Header/Footer Options</i> dialog, the page customization list, or enable the Print a chart legend feature.
	This button closes the <i>Book Style Print Preview</i> dialog.
	Click this button to print only selected pages.
<a href="#">Printing Tips</a>	Click this link to access the <i>OrgPublisher Printing Tips</i> web page for ideas on successfully printing your chart.

- 4.
5. You can use the Print Preview toolbar buttons to change the layout for the printed page, change the number of levels to print on a page, and zoom to a selected percent per page.

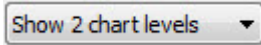
**Button**

**Description**

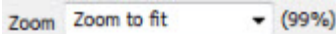
	Click this button to select <b>Layout 1</b> , the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.
	Click this button to select <b>Layout 2</b> , the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.
	Click this button to select <b>Layout 3</b> , the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.



Click this button to select Layout 4, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.



Click this button to select the number of levels from the drop-down list that you want to display.



Click this button to set the zoom percent for the chart display. The default is **Zoom to fit**.



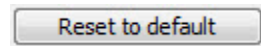
Click this button to place employees in individual boxes below the supervisor box. (Same as **Auto Build** option.)



Click this button to place employees in a box below the supervisor box. (Same as **Auto Build** option.)



Click this button to place employees in the same box as the supervisor. (Same as **Auto Build** option.)



Click this button to reset the chart boxes with employees and supervisors in normal build.

- 6.
7. Click **Print** to print the chart. This button opens your system *Print* dialog.
8. Or, you can close the *Print Preview* without printing the chart by clicking **Cancel**.

Return to Previewing and Printing Charts

## Previewing and Printing a Wall Style Chart

You can preview charts before printing them to check how the chart fits on the pages. Only the *Chart View* can be previewed before printing. Modifications made in the *Print Preview* window now enable you to fine-tune a chart for printing, for instance, by moving boxes or a selection of boxes or changing the chart layout. Using the toolbar, you can move boxes, change box layouts, zoom in or out and select and move boxes.

### Note:

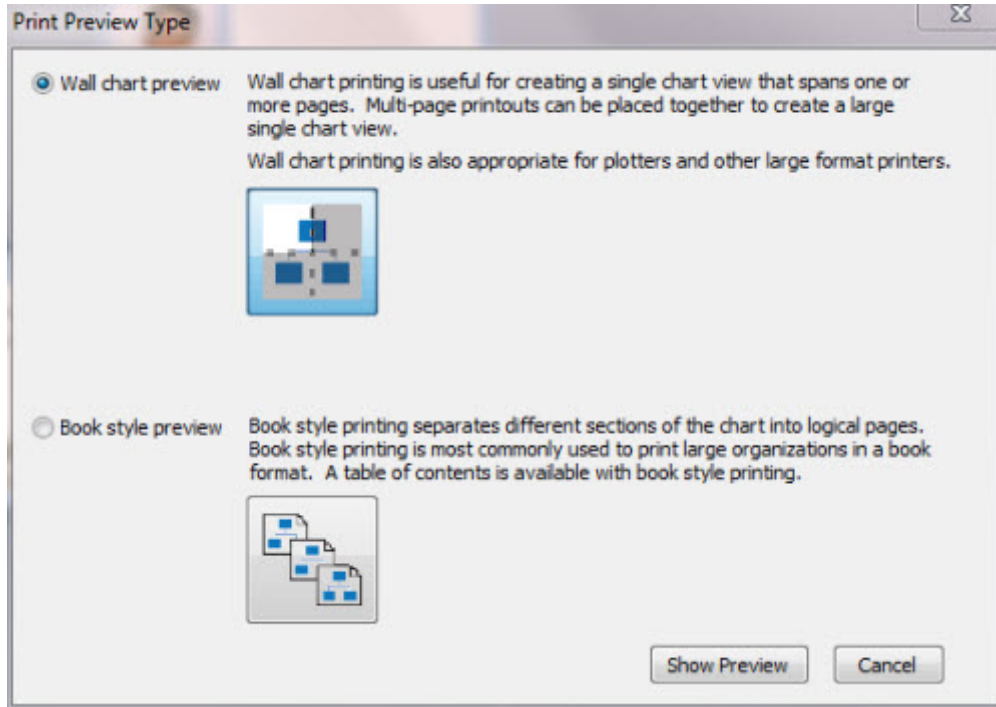
*Note that the connecting line moves with the box. **OrgPublisher is not a drawing tool**, so you do not want to move the box across from or above its manager box because the reporting line draws through it. If you select the top box in a hierarchy, all reporting boxes move as well. Remember these basic rules when moving boxes:*

- *Vertical lines move with the boxes.*
- *The boxes at either end of a row must stay at the end because the corners of the horizontal and vertical lines which link these boxes are "owned" by the boxes.*
- *Unexpected results occur if you move boxes outside of the OrgPublisher hierarchical drawing standards. These standards assure that an OrgPublisher chart can be viewed without written explanation and be understood anywhere in the world.*

If you have **Print Wizard** selected in the **Print Options**, and you select **File, Print Preview**, the *Print Preview Type* text box displays requiring a selection of either **Wall chart print preview** or **Book style print preview**.

1. Open the *Print Preview* by selecting **File** from the menu then **Print preview** from the options list. The *Print Preview Type* dialog opens.

You can also click the Print Preview button  in the toolbar.



The default selection is the preview type you used last. If you are not using the *Print Wizard*, OrgPublisher assumes you will print as a Wall style chart. Click **OK** to accept the default **Wall chart preview** type. The *Print Preview* opens.

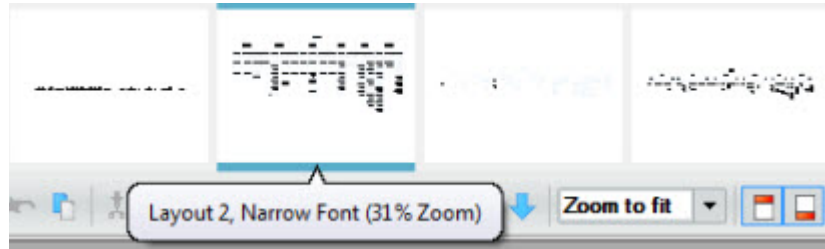


**Note:**

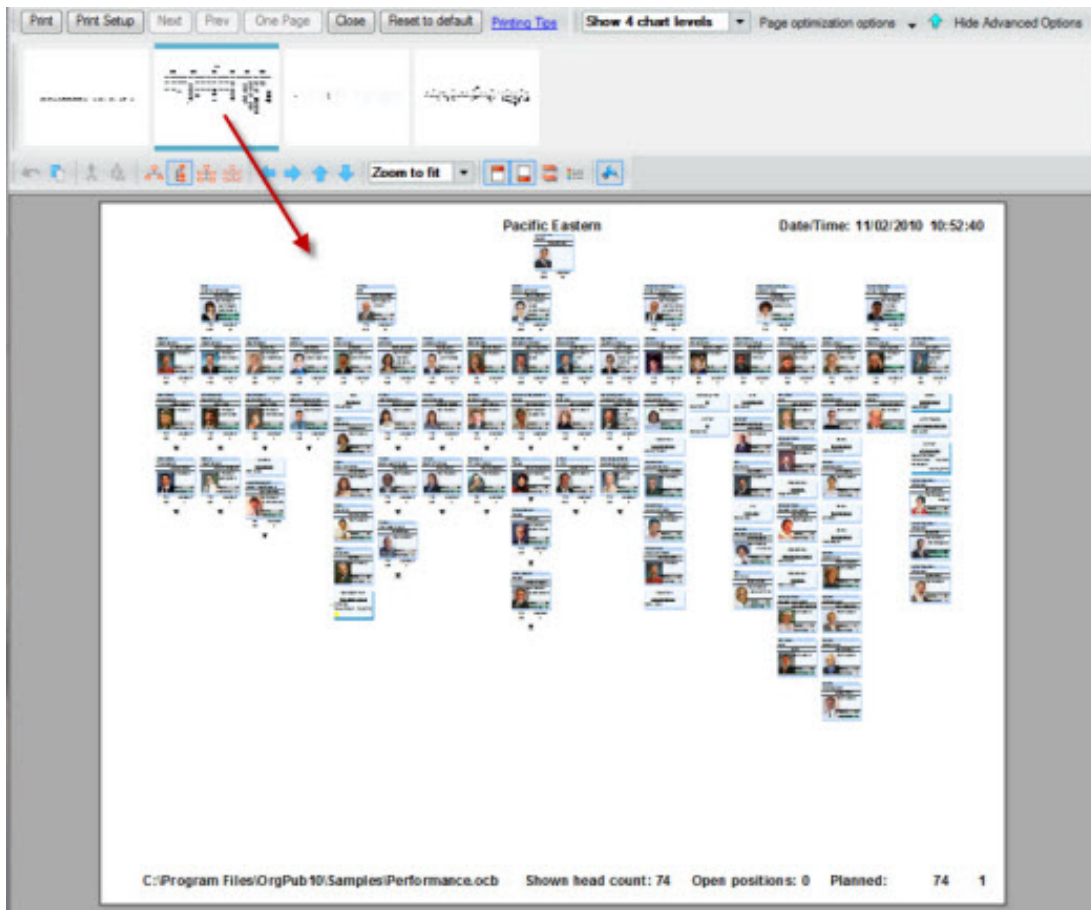
*A thumbnail view may be blank when previewing larger charts or charts displays all levels using less than 1% zoom. Hover the cursor over the thumbnail area to view a description of the layout option.*

The preview now displays the Menu bar as well as thumbnails for preview layouts.

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit on the page. The first thumbnail shows the current default setting for the preview. The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.


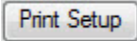



2. Click the thumbnail you want to use, and the layout is displayed in the preview pane.



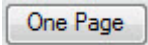
The Menu bar contains buttons that enable you to print, move from page to page, zoom in or out and change from a one page view to two page. Additional buttons have been added for page optimization and advanced options.

The Menu bar buttons include:

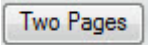
Button	Action Performed
	Click this button to print the chart. If you have <b>Print Wizard</b> selected in <b>Print Options</b> , this button opens the <i>Print Wizard</i> . If you do not have <b>Print Wizard</b> selected, this button opens your system <i>Print</i> dialog.
	Click this button to open the system <i>Print Setup</i> dialog in order to select the printer device, paper size, orientation, and source.
	If your chart will print on multiple pages, click this button to view the next page.



If your chart will print on multiple pages, click this button to view the previous page. This button is enabled only after you've clicked **Next**.



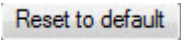
This button indicates your chart can print on multiple pages. Click **Next** to see a page preview. After you have clicked this button, it reads **Two Page**. Click to return to the single page preview.



If your chart will print on multiple pages, this button enables you to see two pages at a time in the preview window. This button is enabled only after you have clicked **Next Page**. After you have clicked this button, it reads **One Page** to return to the single page preview.



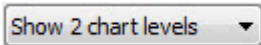
This button closes the *Wall Chart Style Print Preview* dialog.



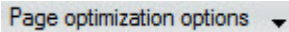
Click this button to reset the chart boxes with employees and supervisors in normal build. (Same as **Auto Build** option.)

[Printing Tips](#)

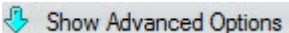
Click this link to access the *OrgPublisher Printing Tips* web page for ideas on successfully printing your chart.



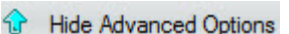
Click this button to select the number of levels from the drop-down list that you want to display.



Click this button to display the check box options for optimizing chart boxes on a page. Options vary, depending on the selected layout.  
**Compact boxes** - reduces the box size, field size, and drill arrow lines; shrinks box shadow.  
**Use narrow font** - changes font to Arial Narrow 8pt.  
**Put employees in box with manager** - turns on Auto Build; available only when at least 1 leaf node box is visible.  
**Put employees in box below manager** - displays reporting employees in a box below assigned manager.  
**Hide secondary fields** - turns on Compact Build mode.  
**Customize** - enabled if Hide secondary fields is selected; opens the Select fields to print dialog, displaying box fields to show or hide; the default is to print only box title and name.



Click this button to display the preview Advanced toolbar.



Click this button to hide the preview Advanced toolbar.

Wall Style preview contains an Advanced toolbar, which offers additional flexibility and control. The toolbar buttons include:

**Button**

**Action Performed**



Click this button to **reverse** the latest action. May be repeated to undo additional actions.



Click this button to **copy** the chart displayed in the preview to another application. Photos in the chart are also copied using this button.



Clicking this button designates the selected box as the **top of your chart**

for the selected style.



Click this button to **display the whole chart** from the highest box in the hierarchy.



Click this button to select **Layout 1**, the layout with the lowest level of each branch in the chart arranged in a horizontal line. This creates shorter, wider charts.



Click this button to select **Layout 2**, the layout with the lowest level of each branch in the chart arranged in a vertical row. This creates narrower, taller charts.



Click this button to select **Layout 3**, the layout with the lowest level of each branch in the chart arranged with the boxes side by side. This creates more compact charts.



Click this button to select **Layout 4**, the layout with the lowest level of the chart (displays only two levels) arranged in a horizontal line across the width of a page for as many lines as it takes to display the lowest level. The number of boxes across is determined automatically or set to a specific number.



Click this button to move the entire *Chart View* to the left.



Click this button to move the entire *Chart View* to the right.



Click this button to move the entire *Chart View* up.



Click this button to move the entire *Chart View* down.



Click this button to set the zoom percent for the chart display.



Click this button to show or hide the header text.



Click this button to show or hide the footer text.



Click this button to open the *Print Header:Footer Options* dialog and select your print options.



Click this button to print a chart legend.



Click to display or hide the drill buttons for printing.

3. You can use the *Print Preview* toolbar buttons to set top of chart, display the whole chart, change the layout for the printed chart, move individual boxes, move the chart left, right, up or down, zoom in or out, show or hide headers and footers, print a chart legend, even open the *Print Header/Footer Options* dialog.

4. For a clearer view of the chart, move the cursor anywhere on the chart and click. The chart enlarges each time you click on it until it fills the page. When you click on a full-page display, it reduces to display the entire chart as it will print. You can also use the **Zoom In** and **Zoom Out** buttons to enlarge and reduce the chart.


5. Click **Print** to print the chart. If you have **Print Wizard** selected in **Print Options**, this button opens the *Print Wizard*. If you do not have *Print Wizard* selected, this button opens your system *Print* dialog.

Or, you can close the *Print Preview* without printing the chart by clicking **Close** or **Esc**.

Return to Previewing and Printing Charts

## Printing a 9 Box Matrix

If included in the published chart, you can print the [9 Box Matrix](#) if the *Print Wizard* has been enabled.

1. Open your chart then open the *9 Box Matrix*.
2. Click the Print button  in the Main toolbar. The *Print Wizard* opens.
3. Select **9 Box Matrix** and click **Next**.
4. Click **Finish** to print the view. The printed *9 Box Matrix* includes the designations for each box, such as High Performance-High Potential or Average Performance-Low Potential.

Return to Working with Succession Planning


Return to Previewing and Printing Charts

## Printing a Chart Legend


### Note:

*This feature may have been disabled by the Administrator. The chart legend does not display in the Book Style print Preview. It does, however, print.*

If you use several group or custom items in your chart, you can choose to print a chart legend when you print your chart using the *Print Wizard* or the *Print Preview*.

1. Open the *Print Wizard* by clicking on the Print button  or, if you have turned off the this option, select **File** from the main menu, then **Print Options** from the pull-down list and **Use Print Wizard** from the options list. The *Print Wizard* opens.
2. Follow the wizard dialogs to print either in Wall chart or Book style.
3. The last dialog enables you to choose header or footer options. If you select the **Include Legend** check box, your printed chart includes the legend on each page of your chart.
4. Click **Finish** to close the wizard and print your chart.

If you are using the *Print Preview* option and a legend appears in your chart, you can use the Print legend


button  in the Wall Chart style preview and select the **Print Legend** check box in the *Settings* dialog of the Book style preview.

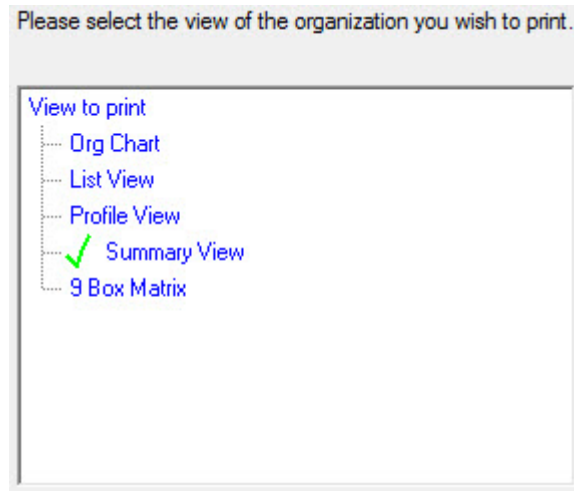
The legend prints on one page in Wall style and on every page in Book style. You may need to make adjustments in your chart for the size of the legend so that it does not print over boxes.

Return to Previewing and Printing Charts

## Printing a Workforce Analysis Graph

Graphs are available for printing when the *Print Wizard* is enabled. Each graph will print one to a page.

1. In the *Summary View*, select the **Graphs** tab.
2. Click the Print button  in the Main toolbar. The *Print Wizard* opens. If you have more than one graph, each graph prints one to a page.
3. Select **Summary View** and click **Next**.



4. Click **Finish** to print the graph. The printed graph displays whatever is shown in the **Graphs** tab, such as a legend or categories.


Return to Previewing and Printing Charts

## Printing the Published EChart as PDF

When the published EChart is opened and the Send to PDF button  displays in the toolbar, you can print the chart as PDF.

**Note:**

*This feature is available for published ECharts only, but may have been disabled by the chart Administrator.*

1. Open the published chart. Verify that the Send to PDF button is enabled, as highlighted in the sample below.
2. Click the button  to create a PDF of the chart. A dialog opens that allows you to select the **Number of OrgChart levels** to print.

In addition, you can choose whether or not to **Include index**, a version of the *List View*.

3. Click **OK** when you have made your selections. A *File Download* dialog opens. You can **Open** the PDF immediately or **Save** the document to a folder of your choice.

When you open the PDF, the index is at the beginning of the document, if you elected to include an index.


The printed chart follows, displaying as many levels as you selected.

Return to New for OrgPublisher 10

Return to Previewing and Printing Charts

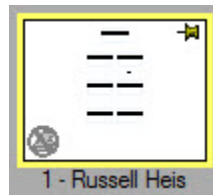
## Selecting Pages to Print in Book Style Preview

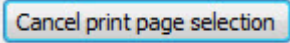
You do not have to print the entire book in the Book Style Print Preview - you can select just the pages you want to print.

1. Select **File** from the menu bar, then **Print Preview** from the pull-down menu. The *Print Preview Type* dialog opens. You can also click on the Print Preview button in the toolbar.
2. Click **Show Preview**. The *Book Style Print Preview* dialog opens, and the chart displays as it will print for each page. The box with the yellow border indicates the current view shown in the preview. See the Preview and Print a Book Style Chart procedure for additional tasks you can perform.
3. Click the  button to enable the selection of specific pages for printing. The *Selective printing mode enabled* message dialog opens, notifying you that the selective printing mode is enabled. You can choose not to display the message again by selecting the **Don't show this dialog again** check box.
4. The individual page thumbnails now include a printer icon.



5. Select the pages that you do NOT want to print. The print icon changes.



6. If you choose not to print only selected pages, click . You can also right-click on a printer icon to use the context menu. Options are **Select all pages to print** and **Clear all pages**.

If you choose to print the selected pages only, click .


Return to Previewing and Printing Charts

## Sending the Chart to Microsoft PowerPoint

You can copy the chart directly to Microsoft® PowerPoint, providing enhanced chart graphic quality and flexibility within presentations. All the information you can see in the OrgPublisher chart is sent to PowerPoint.

**Note:**

*This feature disables the header and footer options, as well as the index or group icon legend for Book style. In addition, the page number circle drill buttons are not available for the copy to PowerPoint option.*

1. In the Main toolbar, click the Send to PowerPoint button . The *PowerPoint Preview* list box opens.
2. Select either the **Wall chart preview** or **Book style preview** radio button. Click **OK**. The *Microsoft PowerPoint Preview* window opens.
3. Make your modifications in the Wall style or Book style preview. If you click **Settings** in the *Book Style preview*, the *Book Style PowerPoint Settings* dialog opens. Follow the *Preview and Print a Book Style Chart* procedure to choose the PowerPoint settings.
4. Click **Send**. The *Send to PowerPoint* dialog opens.
5. In the **Page Range** section, select which pages you want to send to PowerPoint, **Current Page**, **All Pages**, or **Pages**, and enter the page numbers or range.
6. In the **Chart Options** section, select the optional chart features you want to send to PowerPoint. These features include **Show Drill Buttons**, **Chart Title**, which allows you to choose **Title is part of image** or **Title is part of slide**, and **Chart Background**, which allows you to choose **Background is part of image** or **Background is part of slide**.
7. In the **PowerPoint Options** section, the default is **Use currently open presentation**. Clear this check box if a current presentation does not exist or you want to choose a different presentation.
8. In the **Image Options** section, select **Copy as metafile** or **Copy as bitmap**.
9. Click **OK** once you have selected all the options you want to use. Microsoft PowerPoint opens with the chart embedded in the slides.

**Note:**

*When previewing as Wall Chart the Show Drill Buttons option is not available.*

Return to General Chart and View Capabilities

## Using Print Preview Enhancements to Print Charts

The OrgPublisher *Print Preview* features have been enhanced to provide more chart printing options. You can see detail of all the enhancements in the [Previewing a Book Style Chart](#) and [Previewing a Wall Style Chart](#) topics.

When working with a published Thin Client chart, OrgPublisher also provides a popup option to select the number of levels to print.

### Book Style preview

Both the Wall style and Book style previews now contain a Print Setup button for easier access to your print client.

The Book Style preview now provides the ability to print all levels of the chart using the Levels button .

The Book Style *Print Settings* dialog includes the Header/Footer button to open the *Print Header/Footer Options* dialog in order to configure the header and footer display.

### Wall Style preview

The Wall Style Preview has been configured to provide the preview and print controls at the top of the window. The controls also provide a section with thumbnails that give you an idea of what your chart will look like when you select a specific layout.

The thumbnails display a tooltip showing the percent zoom necessary for the chart to fit a the page. The first thumbnail shows the current default setting for the preview. The thumbnails are sorted by the largest percent (least shrinkage) first. However, if a thumbnail is within 5% of the thumbnail preceding it, then OrgPublisher checks to see which thumbnail is squarer; that one will be the first in the list.

Click the thumbnail you want to use, and its layout is displayed in the preview pane.

The default chart layout in Wall Style preview is based on the number of levels displayed in the *Chart View*.

- If 2 levels are displayed:
  - If there are 8 or fewer direct reports, chart **layout 1** is used.
  - If there are more than 8 reports, chart **layout 4** is used.
- If 3 or more levels are displayed, chart **layout 2** is used.

If you accept the default *Wall Style* preview settings, then no check is performed on the size of the chart when the preview is opened.

If you select one of the suggested *Wall Style* thumbnails, then OrgPublisher checks to see if the chart must be shrunk by 50% to fit on a single page when the preview. If so, then the zoom is set to 80%. In all other cases, zoom-to-fit is the default.

In addition, the *Wall Style* preview includes new buttons:

- opens you system *Print Setup* dialog to select printer, paper size, orientation, and source.
- removes all modifications made to the preview layout and returns to the OrgPublisher default layout.
- presents options, depending on the layout selected, to optimize the chart layout on the page.
  1.
    - **Compact boxes** - reduces the box size, field size, and drill arrow lines; shrinks box shadow.
    - **Use narrow font** - changes font to Arial Narrow 8pt.
    - **Put employees in box with manager** - Turns on **Auto Build**; available only when at least 1 leaf node box is visible.
    - **Hide secondary fields** - Turns on *Compact Build* mode.
    - **Customize** - Enabled if **Hide secondary fields** is selected; opens the *Select fields to print* dialog, displaying box fields to show or hide; the default is to print only box title and name.

**Note:**

*If the Advanced Box Layout Editor was used in the chart, Hide secondary fields and Customize are not available.*

- Opens the *Wall Style Preview* Format toolbar in order to set top of chart, choose layout, move boxes, and more.

Return to New for OrgPublisher 10

Return to Previewing and Printing Charts



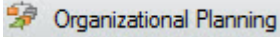




## Working with Organizational Model Planning for Administrators

### Creating a New Planning Chart

**Note:**

*This topic is intended only for planning chart administrators.*

1. Open the planning-enabled chart in the web browser and click the Planning button . (This button may vary, depending on the type of planning charts selected.)
2. Select **Create new planning chart** from the options list. The *Create New Planning Chart* dialog opens. The dialog indicates where the planning chart begins, such as "This chart will include boxes from (name) and down." For instance your chart administrator may publish the chart for you to work from your box down.
3. The planning chart name defaults to "OrgPlan for" and names the top person in the chart, as well as the name of the original chart. Type a name for the chart if you do not want to accept the default name.
4. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
5. Type the **Password** then **Retype password**.
6. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the chart on my Windows desktop** check box.
7. Click **Create and edit chart**. The browser opens the OrgPlan chart with the Insert Toolbar, the Generate a change report , and email  buttons enabled.

The planning chart saves to the folder specified when the original chart was published. PluginX planning charts can be saved to the local hard drive or the web server.

**Note:**

*If you save multiple planning charts to the same web folder, you must specify separate storage folders in order to maintain user name and password security.*

*When you create a planning chart, verify that the box you have selected as top of chart is correct. Once the planning chart is created, drilling up from the designated top of chart is not available.*

*Planning charts do not contain a separate **My groups** tab in the Search View. If you already have groups in the **My groups** tab in the PluginX chart however, those groups are copied to the planning chart.*

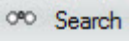
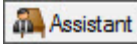
Return to Working with Organizational Model Planning for Administrators

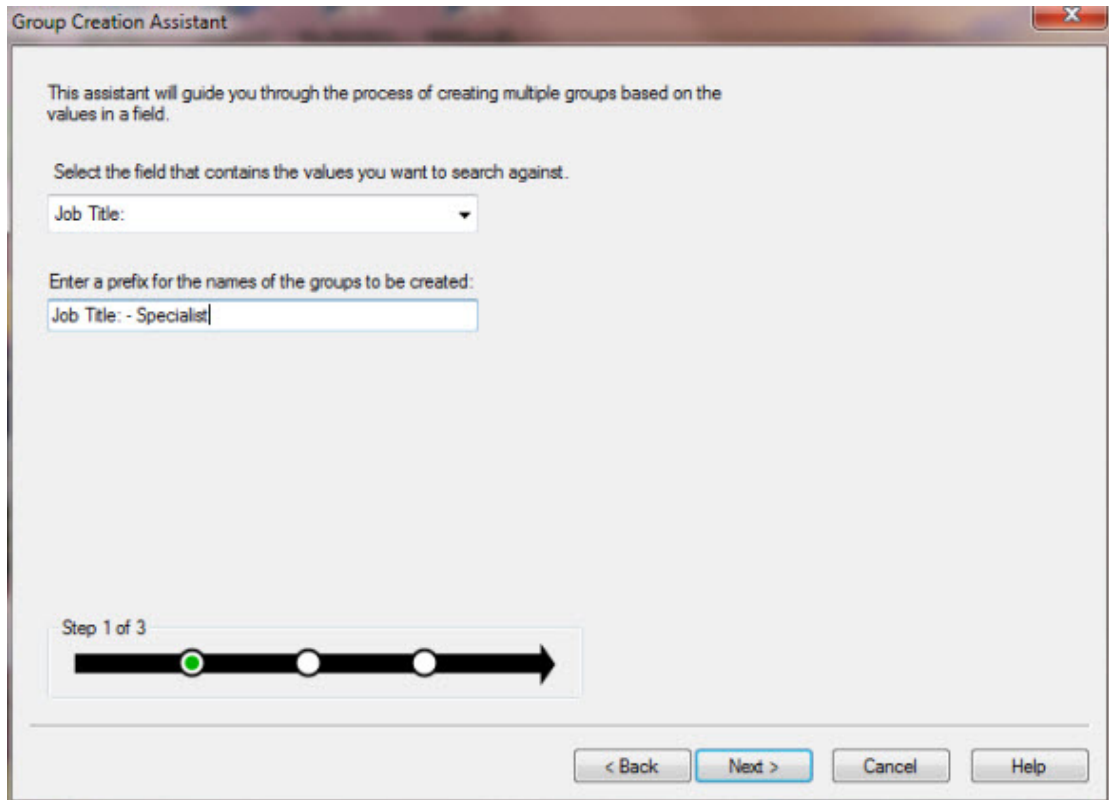
### Creating New Groups for Planning Charts Using the Group Creation Assistant

**Note:**

*This feature is available only in Modeling and Succession planning charts.*

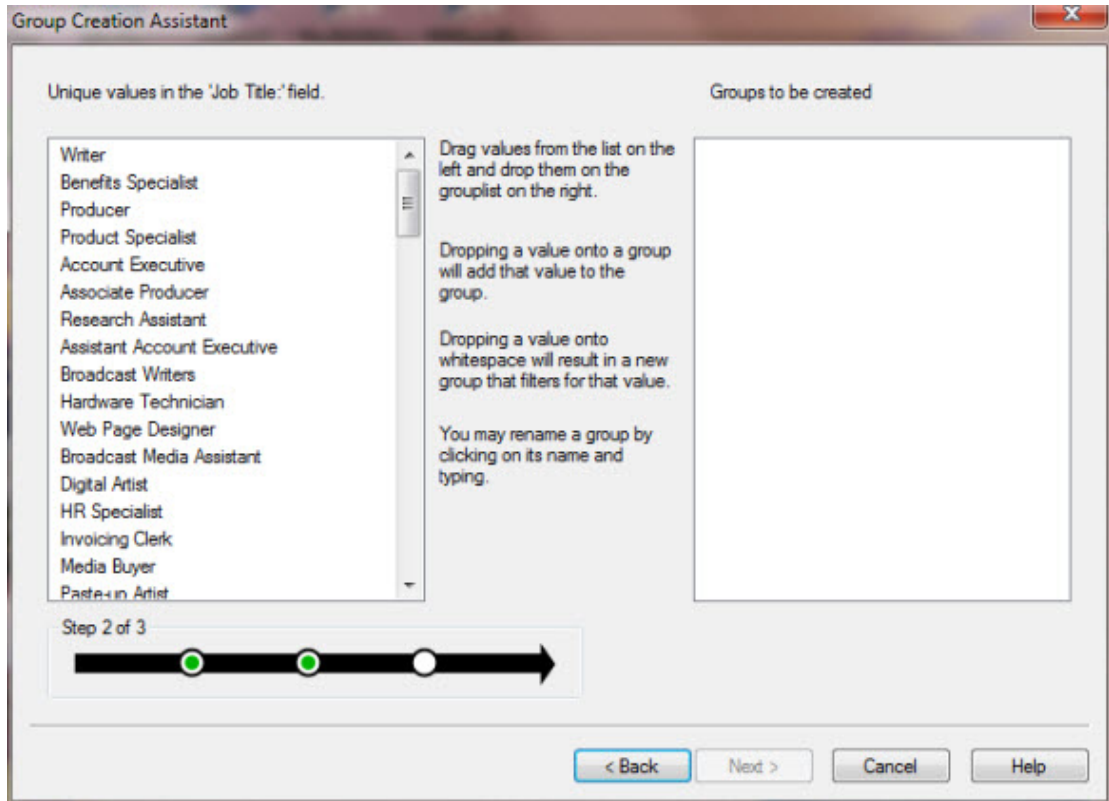
The *Group Creation Assistant* provides a series of dialogs which ask the questions needed to create multiple groups at the same time, although you can use the assistant to create a single group.

1. Click Search  in the Navigation bar. The *Search* dialog opens.
2. Select the **Groups** tab.
3. In the **Groups** tab, click the Group Creation Assistant button . The *Group Creation Assistant Step 1* dialog opens.
4. Click the drop-down arrow in the **Select the field that contains the values you want** field, and select the field you want to search on.



5. Type a prefix or name for the group in the **Enter a prefix for the names of the groups** field. Click **Next**. The *Group Creation Assistant Step 2* dialog opens.

The left pane contains the values available for grouping the data in the field you selected. These values are sorted first by "hit" count (the highest number of records to match the criteria), then alphabetically.

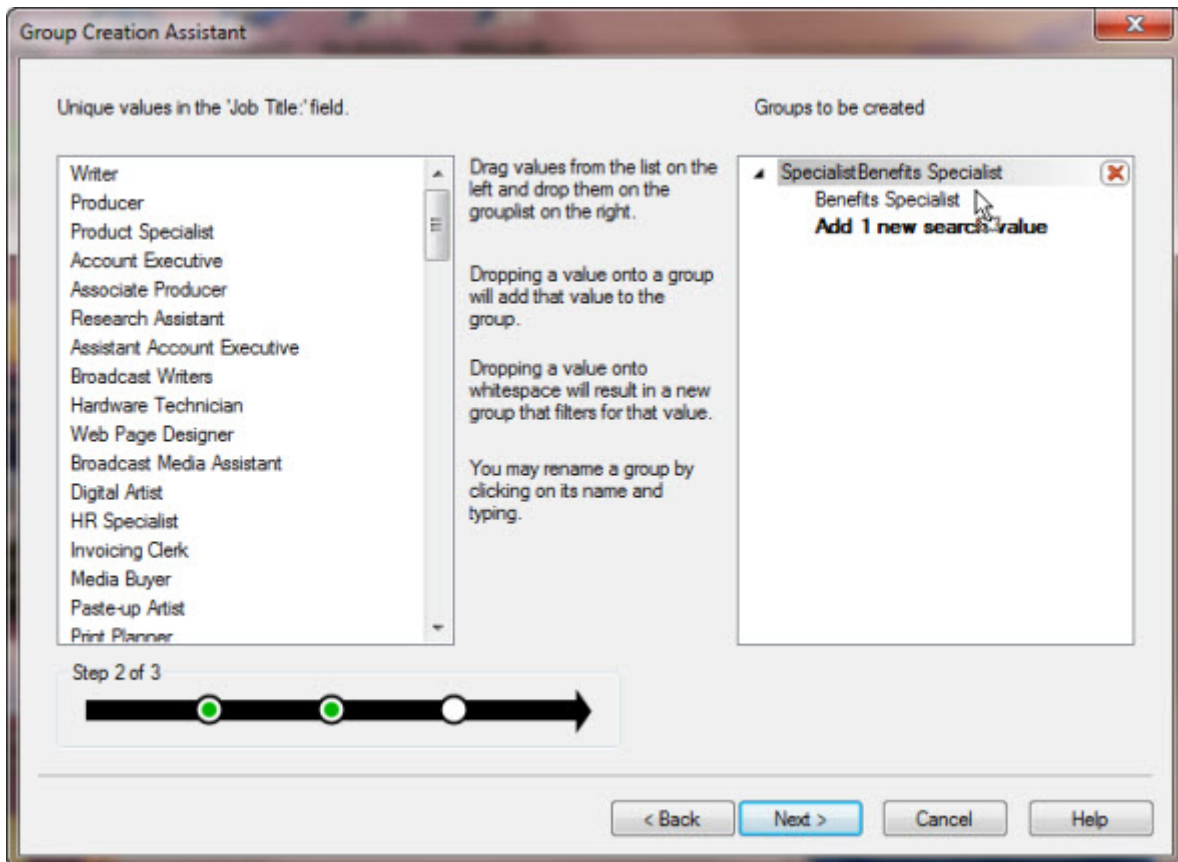


6. Drag and drop the correct value to the right pane.

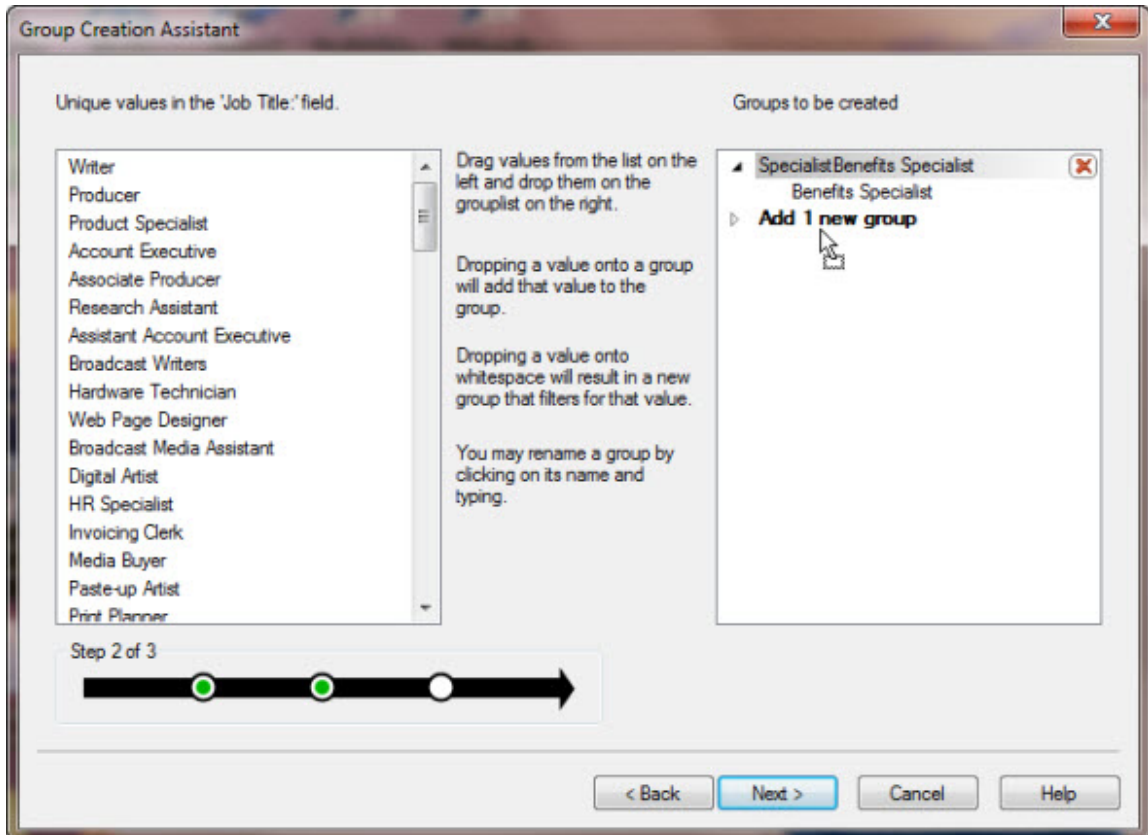
**Note:**

*You can create more than one group by selecting multiple fields.*

7. If you want to use multiple values from which to create the group, drag another value from the left pane and drop it on the first value.

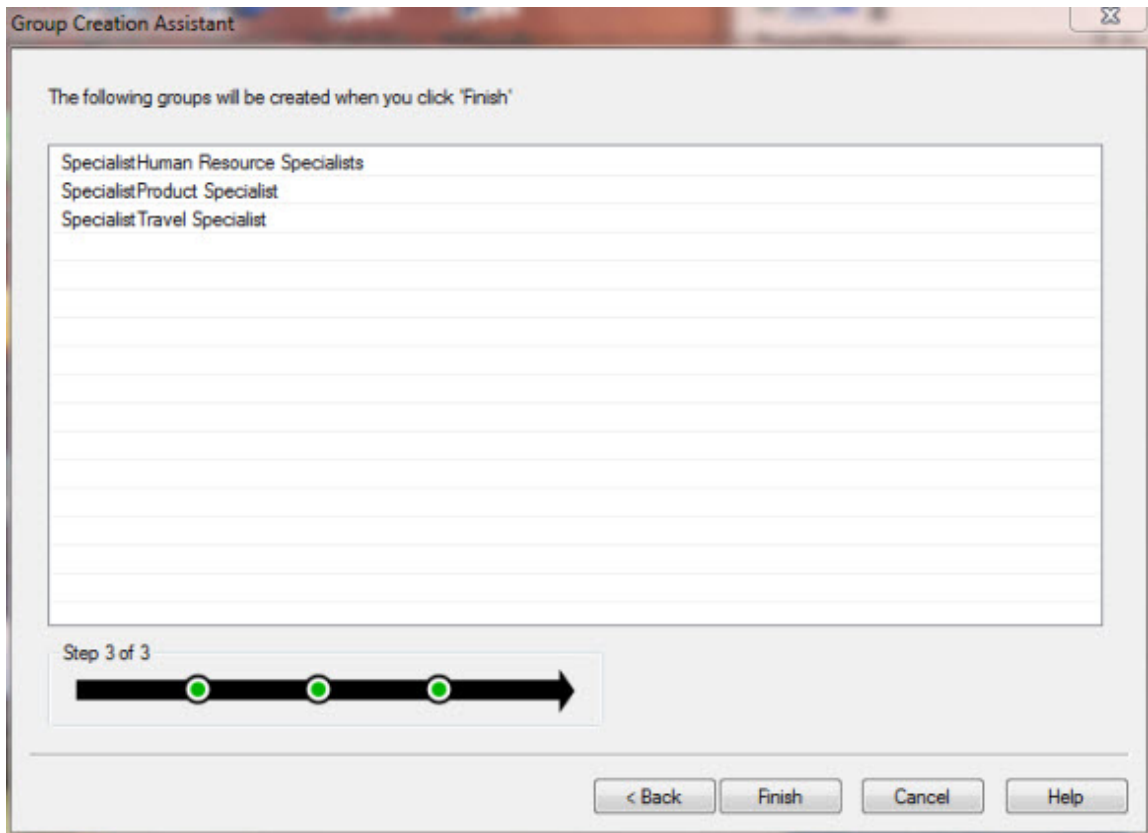


8. If you want to create multiple groups, drag a value from the left pane and drop it in the white space of the right pane.

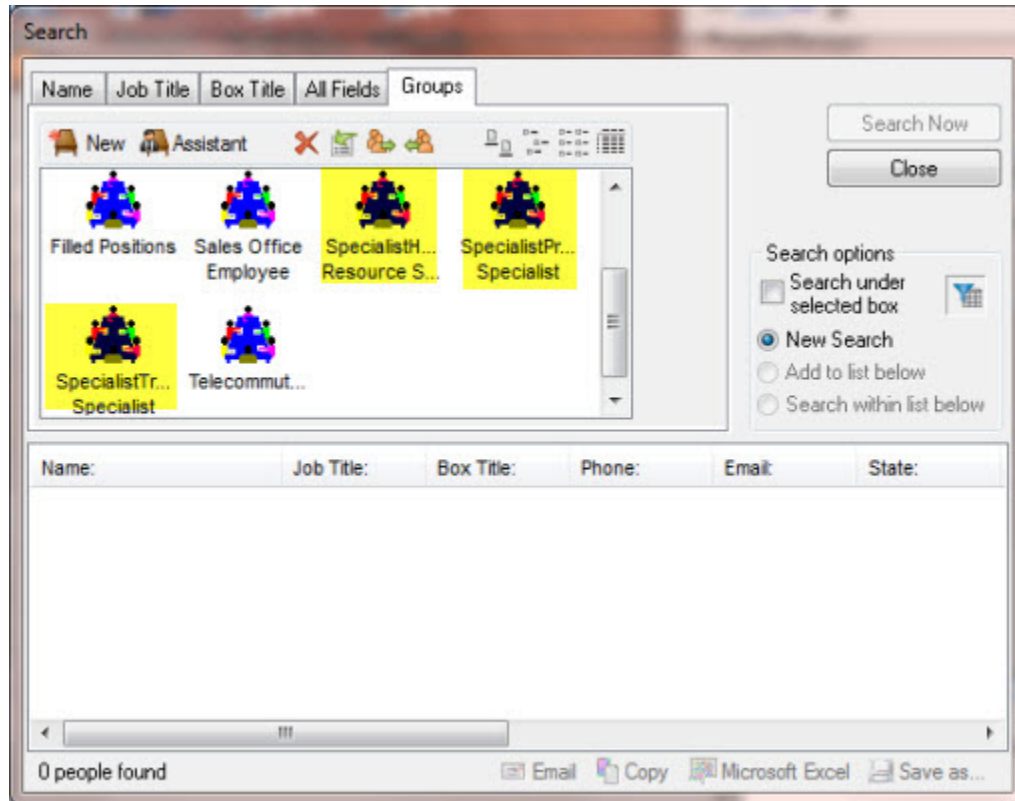


You can create several groups at the same time using single or multiple values in each. When you have created the group parameters you want, click **Next**.

9. The *Group Creation Assistant dialog Step 3* opens, displaying the groups that will be created. If the listed groups are correct, click **Finish**. If they are not correct, click **Back** and repeat the applicable steps 4 - 9.



The **Groups** tab of the *Search* dialog displays the groups that were created using the *Groups Creation Assistant*.



10. On the Style Bar, click the Groups View button  to display the *Filter View*.

11. Click on group to display it in the *Chart View*.



Return to New for OrgPublisher 10

Return to Working with Organizational Model Planning

## Deleting a Planning Chart

### Note:

*This topic is intended only for planning chart administrators.*

1. Open the planning-enabled published chart in the web browser. Click the Planning button  **Organizational Planning**. This button may vary, depending on which planning option you are using.
2. Click  **Delete** from the options list. A list of all planning charts appears.
3. Select the planning chart definition you want to delete. A message states that the task cannot be undone and verifies that you want to delete a planning chart.
4. Click **Yes**. A message notifies you that the selected chart has been deleted.


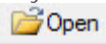

Return to Working with Organizational Model Planning for Administrators

## Managing Planning Charts

**Note:** This topic is intended only for planning chart administrators.

When viewing a published planning-enabled chart, you can manage the planning charts.

When you click the Launch planning charts button  the first time, the standard create a chart dialog opens.

If a planning chart already exists, you see the list of existing charts. You can create a new planning chart , select a chart to open , or select a chart to delete .

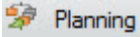

[Return to Working with Organizational Model Planning Charts](#)

[Return to Working with Succession Planning Charts](#)

## Opening a Planning Chart

**Note:**

*This topic is intended only for planning chart administrators*

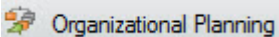
1. Open the planning-enabled published chart in the web browser. Click the Planning button .
2. Select **Open planning chart** from the options list.
3. Click once on the planning chart definition you want to open. The selected chart opens in the same browser window.
4. Return to the planning-enabled chart by clicking the Back button  in the browser.

[Return to Working with Organizational Model Planning for Administrators](#)

## Setting Levels for Planning Charts

**Note:** This topic is intended only for planning chart administrators.

When creating a new planning chart, you can determine how many levels to allow in the planning chart.

1. In the published planning-enabled chart, click the Organizational Planning button . This button may vary, depending on whether or not Succession Planning has been enabled.

If planning charts exist, the *Organizational Planning Charts* dialog opens with a list of existing planning charts. Click the New button  **New**.

If no planning charts currently exist, the *New Organizational Planning Chart* dialog opens automatically.

2. Select the **Restrict planning chart size** check box.
3. Use the down-arrow to select the number of levels you want to **Limit chart size to** field.
4. Click **Create and edit chart** to open the new planning chart.

Return to Working with Organizational Model Planning Charts

## Storing Planning Charts

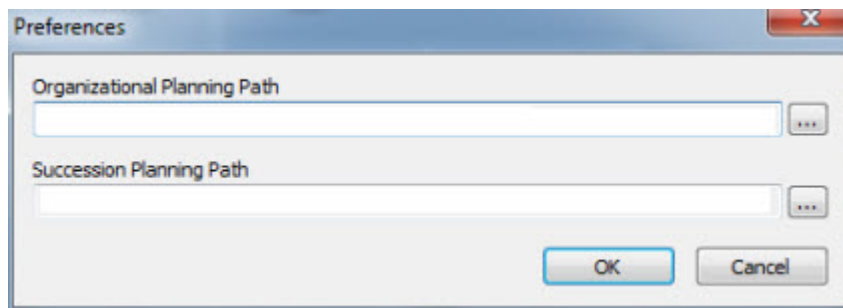
### Note:

*This topic is intended only for planning chart administrators.*


When a secured EChart is published using the OrgPlan feature, you can store your planning charts either on the end user's PC or the EChart web server. Planning charts can be shared via email when using the end user PC option. When using the server option, each end user automatically has access to planning chart information that exists at or below the user's box in the hierarchy.

Storing the planning charts on the server makes sharing them very easy, but, possibly, makes the information in them highly vulnerable. It is essential that the folder in which they are stored is properly secured.

1. In the planning chart, select **File** from the Main menu then **Preferences** from the options list. The *Preferences* dialog opens.



The dialog displays the default locations set by the IT administrator. If you have the appropriate permissions, you can select to store the planning chart on a local drive or a network location.

2. Type or browse  to the folder on the server to store planning charts, and verify that the folder is secure - accessible to the EChart sever but not to HTTP requests. If you are in doubt about the security, contact your IT administrator.
3. Click **OK** to save the specified folder and return to the planning chart.

If you are in doubt about the security, contact your IT administrator.

**Note:** *Planners may encounter an error when sending a planning chart created on a local machine using Microsoft Vista. It is recommended that administrators use a secured server location.*

Return to Working with Organizational Model Planning for Administrators

[Return to Working with Succession Planning for Administrators](#)

## Working with Succession Planning for Administrators

### Adding a Succession Candidate to a Box

When you create a succession planning chart, the chart opens with no hierarchical information included because this type of chart is meant to help you plan for successors to specific positions within your company.

**Note:**

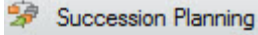


*Succession candidates are not included in head counts or summaries.*

- Drag and drop individuals from their current box into the box of the position for which they are candidates. You must then change the position type manually.

Return to Working with Succession Planning

### Creating a New Succession Planning Chart

If published through OrgPublisher Premier, planning administrators can create a new succession planning chart, modify an existing chart, or delete a planning chart. When in succession planning chart end users can add and remove successors from the chart but cannot change the chart structure.

1. Open the planning-enabled chart in the web browser and click the Succession Planning button .
2. Select **Create new succession planning chart**. The *New Succession Planning Chart* dialog opens. If a current succession planning chart does not exist, the dialog opens as soon as you click the button.
3. Type a name for the chart if you do not want to accept the default.
4. If not already enabled by the chart administrator, you can select the **Password protect this chart** check box to require typing a password whenever the chart is opened.
5. Type the **Password** then **Retype password**.
6. If you want a shortcut to the planning chart to display on your desktop, select the **Create a shortcut to the chart on my Windows desktop** check box.
7. Click **Create and edit chart**. The browser opens the succession planning chart with the Insert toolbar, the Generate a change report , and email  buttons enabled. See the *Generating a Change Report* procedure for detailed information.

Return to Working with Succession Planning

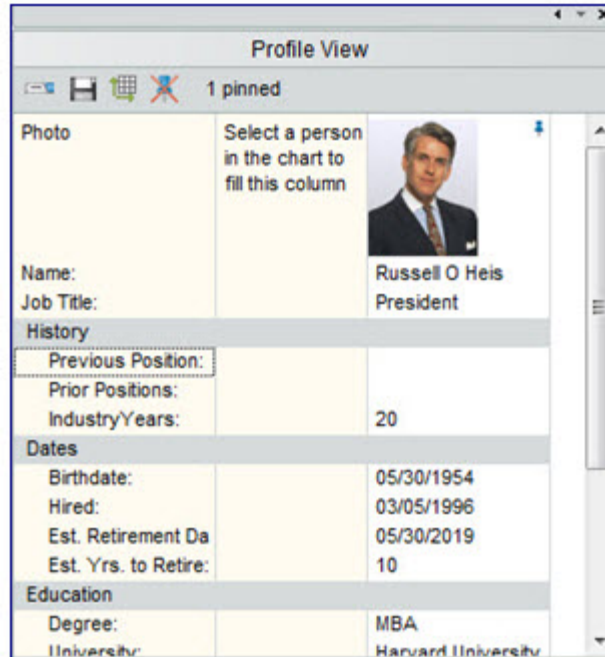
### Creating Side-by-side Profiles

Side-by-side *Profile View* allows the you 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 the published chart if your chart administrator has created side-by-side profiles.

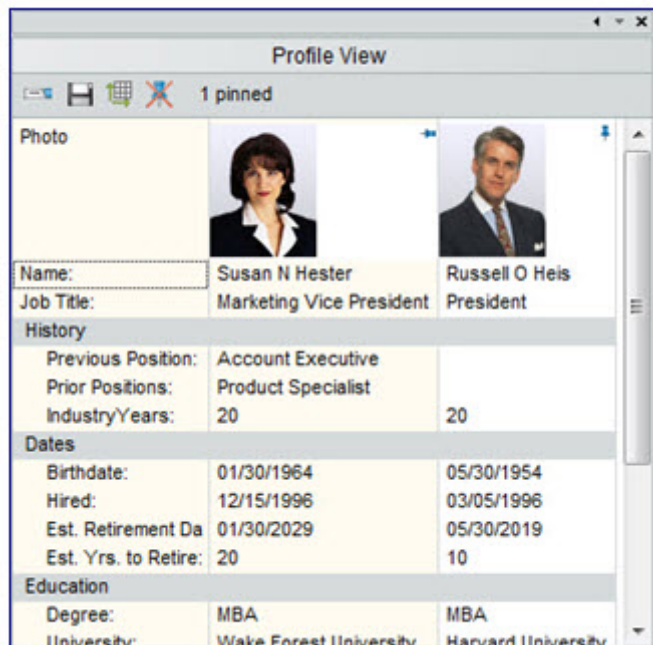
When you have selected the side-by-side profiles you want to use, you can create a new group.

The side-by-side profiles can be printed by selecting the *Profile View* in the *Print Wizard*.

1. Open the *Profile View*. The profile for the top box appears.
2. Select the name, job title, or box title in the chart you want to see in the side-by-side *Profile View*.
3. Click the pin button in the upper right corner to anchor the profile. The profile is anchored and moved to the right, and a placeholder is created on the left for the next profile.



4. Click on another person's name, job title, or box title (depending on the data you are profiling; you want to compare like data fields) to populate the placeholder with the selected person's information.
5. If the added profile is pinned, both pinned profiles move to the right, and an additional placeholder appears.




6. Continue selecting and pinning the profiles you want, repeating Steps 2-3.

Return to Working with Succession Planning

## Printing a 9 Box Matrix

If included in the published chart, you can print the [9 Box Matrix](#) if the *Print Wizard* has been enabled.

1. Open your chart then open the *9 Box Matrix*.
2. Click the Print button  in the Main toolbar. The *Print Wizard* opens.
3. Select **9 Box Matrix** and click **Next**.
4. Click **Finish** to print the view. The printed *9 Box Matrix* includes the designations for each box, such as High Performance-High Potential or Average Performance-Low Potential.

Return to Working with Succession Planning

Return to Previewing and Printing Charts

## Saving Side-by-side Profiles as Groups

You can create groups from the displayed and pinned [side-by-side profiles](#).

1. Select the profiles you want to use as a side-by-side profile then click on the **Save the current set of people as a new group** button. The *Group Editor* dialog opens.
2. The default **Group Name** displays as **Profile Group**. You can keep this name or type over it with the name you want to use.
3. Click **Save**. The *Group Editor* dialog closes and the new group is included in the *Groups View*. You can select the group name from the *Groups View* to display the selected people in the *Chart View*.

Return to Working with Succession Planning

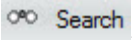

Return to Searching for and Working with Groups

## Searching for Person Successor Counts

The **Person succession count** uses the employee ID and position type of **<SC>** to determine if a person is slated for more than one position. Your organization may want to see everyone slated for more than one position. You may also want to create groups showing people slated for 2 positions, 3 positions, etc.

**Note:**

The results show only the <SC> record, not an entry for the successor's standard position. In addition, this is a compound search. The Person succession count search option first goes through the data to find all <SC> records in the chart. The resulting <SC> records are searched a second time to see if any employee IDs appear on the list more than once. **Accurate employee IDs for each record must exist in your data in order to use this option.** from the menu bar, then **Search** from the pull-down options, or open the **Search View** pane in the List View. You can also click on the Search button in the toolbar.

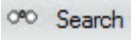
1. Open the *Search dialog* by clicking .
2. If you have selected a specific box in the *Chart View*, the *Search dialog* selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
3. If you are using the *Search View* and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
4. Select the **All Fields** tab.
5. In the **Search** field, click the drop-down arrow to select **Person successor count**. You can also press the key of the first letter of the field you want to navigate through the list.
6. In the **For** field, type the number you want to search on. For instance, if you want to see how many positions contain more than one successor, type the number 2.
7. In the **Match** field, click the down-arrow to select **>= Greater than or equal to**.
8. Click **Search Now** or Go . OrgPublisher performs the search and displays the matching records in the lower pane.
9. You can save the search results as a group or perform an additional search.


Side by side profiles are limited to 6 at a time if you auto-pin the profiles in the *Search View*.

[Return to Working with Succession Planning](#)

## Searching for Successors in a Box


This search option provides a list of people in a box containing a selected number of successors, and helps you locate where you have no successors or too many successors for a specific position.


1. Open the *Search dialog* by selecting **Edit** from the menu bar, then **Search** from the pull-down options, or open the *Search View* pane in the *List View*. You can also click on the Search button  in the toolbar.
2. If you have selected a specific box in the *Chart View*, the *Search dialog* selects the **Search under selected box** check box. This begins the search at that point in the chart. If you want to search the entire chart, click the **Search under selected box** check box to clear it.
3. If you are using the *Search View* and want to start your search from a specific box in a chart, you must first select a box in the *Chart View* and then select the **Search under** check box. This begins the search at that point in the chart.
4. Select the **All Fields** tab.

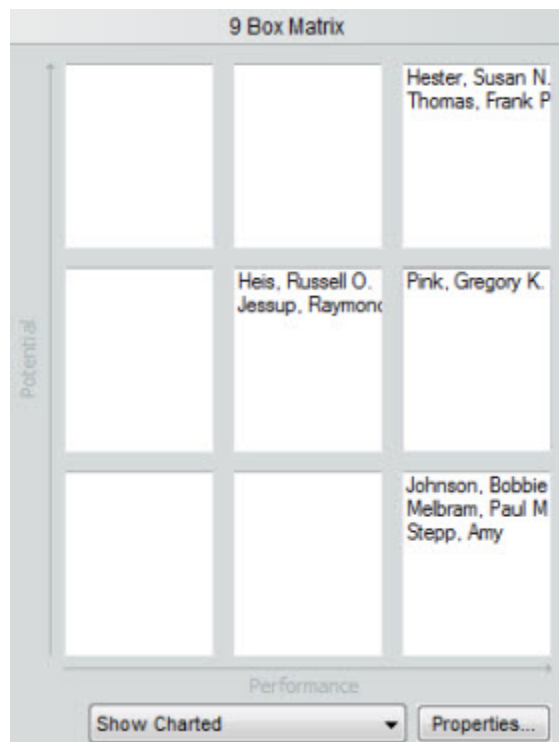
5. In the **Search** field, click the drop-down arrow to select **Successor(s) in a box**. You can also press the key of the first letter of the field you want to navigate through the list.
6. In the **For** field, type the number of successors in a box you want to find. For instance, if you want to see all boxes that contain more than one successor, type **1**.
7. In the **Match** field, click the down-arrow to select **=Equal to**.
8. Click **Search Now** or Go . OrgPublisher performs the search and displays the matching records, successors and managers in the box in the lower pane.
9. You can save the search results as a group or perform an additional search.

Return to Working with Succession Planning

## Viewing the 9 Box Matrix

If made available in the published chart, you can view the *9 Box Matrix*. The matrix will either be displayed in the chart or the 9 Box Matrix button  will be enabled in the toolbar.

- Open your chart. If the matrix is not displayed, click the 9 Box Matrix button . The *9 Box Matrix* opens.



Return to Working with Succession Planning



## Index

<b>9</b>	
9 Box Matrix.....	58, 77, 79
<b>A</b>	
Accessibility.....	28
Add person to the Group.....	38
Add to list below.....	41
Adding a Group Category.....	5, 35
Adding a New Group to the My groups Tab.....	37
Adding a Person to a Group in the My groups Tab.....	38
Adding a Succession Candidate to a Box.....	75
Adjusting Column and Row Widths in Views.....	21
Advanced Search.....	15, 45
Advanced toolbar.....	53
All Fields.....	28, 41, 77, 78
All Pages.....	25, 60
And/Or.....	39
Any Part of Field.....	41
<b>B</b>	
Background is part of image.....	25, 60
Background is part of slide.....	25, 60
Book Style.....	49
Book Style Preview.....	14, 25, 60, 61
Book style print preview.....	49, 51, 53, 60
Box below the supervisor box.....	51
Box layouts.....	51
Box title.....	21, 41, 75
Boxes below the supervisor box.....	51
Box-to-box.....	15, 45
<b>C</b>	
Case-sensitive.....	41
Category.....	5, 35
Chain of Command.....	17, 31
Chart Background.....	25, 60
Chart legend.....	28, 53
Chart Options.....	25, 60
Chart Title.....	25, 60
Chart View.....	7, 14, 17, 22, 23, 24, 26, 28, 29, 30, 31, 33, 38, 40, 41, 43, 51, 53, 61, 65, 77, 78
Clear all.....	39
Clear all pages.....	60
Clear List.....	16, 46
Click and Drag.....	28
Collapse.....	29
Color.....	49
COM automation.....	22
Compact boxes.....	14, 53, 61
Compare.....	39
Copy.....	22, 53
Copy as bitmap.....	25, 60
Copy as metafile.....	25, 60
Copy hyperlink to box.....	21
Copy hyperlink to person.....	21
Copy List to Clipboard.....	41
Copying a Hyperlink to a Person in the Chart.....	21
Copying the Summary View.....	21
Create.....	72
Create a shortcut to the chart.....	65, 75
Create and edit chart.....	65, 72, 75
Create multiple groups.....	7, 65
Creating a New Planning Chart.....	65
Creating a New Succession Planning Chart.....	75
Creating and Editing a Book Style Page Customization List.....	49

Creating New Groups for Planning Charts Using the Group Creation Assistant .....	7, 65	End User Accessibility.....	28
Creating Side-by-side Profiles .....	75	Enter a prefix for the names of the groups .....	7, 65
Ctrl- .....	28	Enter Password .....	23
Ctrl+ .....	28	Enter Search text.....	28
Current Page .....	25, 60	Equal to.....	78
Custom field .....	23	Everyone group .....	39
Custom Level.....	24	Excel.....	15, 44, 45
Customize .....	14, 53, 61	Expand.....	29
Customizing Header and Footer Information .....	49	Export .....	44
<b>D</b>		Export a Group.....	39
Date and time.....	49	Exporting and Importing Groups from the My groups Tab .....	39
Date format.....	26	<b>F</b>	
Delete.....	72	F key.....	28
Delete Group Definition.....	44	File .....	49, 51, 53, 58, 60, 73
Deleting a Group from the My groups Tab .....	38	File Download.....	13, 59
Deleting a Planning Chart.....	71	Filter View .....	7, 40, 44, 65
Details .....	15, 16, 45, 46	Find .....	28
Display Chain of Command.....	17, 31	Find Next.....	24, 28
Display Whole Chart .....	26, 53	Font .....	49
Drag and drop .....	75	Font Customization .....	49
Drill buttons .....	53	Font style .....	49
Drill-down .....	24	Footer .....	14, 49, 61
Drilling level .....	22	For.....	78
Drill-up .....	24	<b>G</b>	
<b>E</b>		Generate a change report .....	65
EChart .....	13, 59, 73	Go .....	15, 16, 43, 45, 46, 77, 78
Edit .....	78	Going to the Top of the Displayed Chart .....	22
Edit Group Definitio .....	44	Graphs .....	59
Editing a Group Definition in the My groups Tab....	39	Greater than or equal to .....	77
Effects .....	49	Greater-than sign .....	29
email address .....	43	Group.....	28, 40, 75
End of a row .....	53	Group Creation Assistant .....	7, 65

Group Data Files ..... 39  
 Group Definition..... 44  
 Group Editor..... 5, 35, 39, 41, 44, 77  
 Group label ..... 49  
 Group Name..... 41, 77  
 Groups..... 5, 7, 15, 35, 38, 40, 41, 43, 44, 45, 65

**H**

Head counts ..... 26  
 Header/Footer ..... 14, 49, 61  
 Heading ..... 26  
 Hide secondary fields..... 14, 53, 61  
 Hierarchical drawing standards ..... 53  
 Hierarchically logical box..... 49  
 Hierarchy ..... 17, 31  
 Highlight search results in chart ..... 43  
 Horizontal ..... 51, 53  
 Hotspot link..... 3  
 Hover Profile..... 33  
 How to Tell if You're Working with a Thin Client or  
 PluginX Chart..... 3  
 Hyperlink ..... 21

**I**

Icon ..... 28, 34  
 ID ..... 77  
 Image Options ..... 25, 60  
 Import ..... 44  
 Import a Group..... 39  
 Include index..... 13, 59  
 Include Legend ..... 58  
 Individual boxes below the supervisor box..... 51

**J**

Job..... 23  
 Job title ..... 21, 41, 75

**K**

Keyboard command ..... 28

**L**

Layout..... 14, 61  
 Layout 1 ..... 14, 51, 53, 61  
 Layout 2..... 14, 51, 53, 61  
 Layout 3..... 51, 53  
 Layout 4..... 14, 51, 53, 61  
 Layouts ..... 53  
 Levels ..... 14, 17, 24, 28, 31, 51, 53, 61  
 Limit chart size to ..... 72  
 List ..... 15, 16, 45, 46  
 List View..... 17, 23, 24, 26, 31  
 Locating Information with the List View ..... 23  
 Locating Information with the Tree View..... 23  
 Look For ..... 15, 16, 45, 46

**M**

Making the Chart Work for You..... 1  
 Managing Planning Charts..... 72  
 Match..... 78  
 Match Case ..... 39, 41  
 Match Whole Field..... 41  
 Matching record..... 15, 16, 45, 46  
 Matrix reporting..... 34  
 Minus ..... 29  
 Mouse cursor ..... 28, 33, 34  
 Move down ..... 53  
 Move left ..... 53  
 Move right ..... 53  
 Move up ..... 53  
 Move up or down ..... 24  
 Multiple people listed in a box ..... 21  
 Multiple relationships ..... 34

Multiple values.....	7, 65	Password.....	23, 65, 75
My groups.....	1, 3, 37, 38, 39, 40, 43, 44, 65	Password protect this chart.....	65, 75
<b>N</b>		Paste.....	22
N key.....	28	PDF.....	13, 59
Name.....	21, 23, 41, 75	Permissions.....	73
New Group.....	37	Person.....	23
New Group Definition.....	44	Person succession count.....	77
New Planning Chart.....	65, 72	Person's location in the chart.....	21
New succession planning chart.....	75	Pin.....	15, 34, 45, 75
Next Page.....	53	Pin the Style View.....	24
Number of OrgChart levels.....	13, 59	Pinned profiles.....	75
Number of successors.....	78	Placeholder.....	75
<b>O</b>		Planning.....	72
OCG.....	39	Planning chart.....	17, 31, 71, 72, 73
One Page.....	53	Planning-enabled chart.....	1, 17, 31, 65, 71, 72
Open.....	72	PluginX.....	3
Open planning chart.....	72	Plus.....	29
Opening a Password Protected Chart.....	23	Positions.....	23, 75
Opening a Planning Chart.....	72	PowerPoint.....	25, 60
Opening a Selected Group in the Chart View.....	40	PowerPoint Options.....	25, 60
Opening and Pinning the Styles View.....	24	PowerPoint Preview.....	25, 60
Optimization settings.....	51	Preferences.....	73
Optimizing chart boxes.....	53	Previewing and Printing a Book Style Chart.....	51
Organizational Model Planning.....	72, 73	Previewing and Printing a Wall Style Chart.....	53
Organizational Planning Charts.....	72	Previous page.....	53
Orientation.....	14, 61	Primary email.....	43
Outline.....	29	Print.....	51, 59
<b>P</b>		Print Header/Footer Options.....	51
Page customization list.....	49	Print all levels.....	14, 61
Page Range.....	25, 60	Print Header/Footer Options.....	14, 49, 53, 61
Page thumbnails.....	60	Print icon.....	60
Pages.....	25, 60	Print legend.....	58
Paper size.....	14, 61	Print on multiple pages.....	53

- Print only selected pages..... 51
- Print Options ..... 51, 53, 58
- Print preview ..... 14, 49, 51, 53, 60, 61
- Print Preview Type..... 51, 53, 60
- Print Settings..... 14, 61
- Print Setup ..... 14, 51, 53, 61
- Print Wizard..... 51, 53, 58, 59, 77
- Printer ..... 14, 61
- Printing a 9 Box Matrix..... 58, 77
- Printing a Chart Legend ..... 58
- Printing a Workforce Analysis Graph ..... 59
- Printing the Published EChart as PDF ..... 13, 59
- Printing Tips ..... 51, 53
- Profile Group ..... 41, 77
- Profile View ..... 15, 27, 30, 33, 45, 75
- Published chart ..... 1
- Put employees in box below manager ..... 53
- Put employees in box with manager ..... 14, 53, 61
- Q**
- Quick Search Results ..... 15, 16, 45, 46
- R**
- Real-time charting..... 1
- Re-centers ..... 23
- Remember my password ..... 23
- Remove ..... 39
- Remove person from group ..... 40
- Remove selected items ..... 49
- Removing a Person from a Group in the My groups Tab..... 40
- Report to instances ..... 34
- Reporting boxes..... 22
- Reset..... 51, 53
- resize ..... 3, 21
- Restrict planning chart size ..... 65, 72
- Retype password ..... 75
- Right-click menu..... 37, 40
- Row size..... 51
- S**
- Same box as the supervisor ..... 51
- Sample..... 49
- Save As..... 39
- Save as Group..... 41, 44
- Save the current set of people as a new group 41, 77
- Saving Side-by-side Profiles as Groups ..... 41, 77
- Screen reading software ..... 28
- Scroll ..... 24
- Scrolling ..... 28
- Search ..... 7, 24, 44, 65
- Search criteria..... 43
- Search Field ..... 5, 35, 39
- Search Mode ..... 15, 45
- Search Now ..... 39, 41, 77, 78
- Search options ..... 41
- Search Results ..... 44
- Search under ..... 78
- Search under selected box..... 41, 77
- Search View... 15, 26, 34, 38, 39, 40, 41, 43, 44, 45, 77, 78
- Search within list below..... 41
- Searching Charts ..... 41
- Searching for Person Successor Counts ..... 77
- Searching for Successors in a Box..... 78
- Security..... 73
- Select a Group ..... 38
- Select all ..... 39
- Select all pages to print..... 60

Select fields to print .....	14, 61	Style Bar .....	40
Select Font .....	49	Styles View .....	24
Select Groups to Export .....	39	Subheadings .....	27
Select the field that contains the values you want ..7, 65		Succession planning .....	41, 58, 73, 75, 77, 78, 79
Selecting Drilling Options .....	24	Successor .....	77, 78
Selecting Pages to Print in Book Style Preview .....	60	Successor(s) in a box .....	78
Selective printing mode enabled.....	60	Summary View .....	21, 59
Send email to group .....	3	Symbols .....	29
Send to PDF .....	13, 59	<b>T</b>	
Sending Email to a Group in the My groups Tab ....	43	Thin Client .....	1, 3, 14, 61
Sending the Chart to Microsoft PowerPoint .....	25, 60	Thumbnail view .....	53
Setting Levels for Planning Charts .....	72	Thumbnails .....	14, 61
Setting the Top of Chart .....	26	Title .....	49
Settings .....	25, 49, 58, 60	Title is part of image .....	25, 60
Show Drill Buttons.....	25, 60	Title is part of slide .....	25, 60
Show or hide .....	53	To.....	43
Show Preview .....	51	Toolbar Search .....	16, 46
Side-by-side Profile View .....	75	Top of Chart.....	24, 53
Side-by-side profiles .....	41, 51, 53, 77	Top of page (Book style printing) .....	49
Simple searches .....	1	Tree View .....	23, 29
Single field searching.....	1, 41	Two Page.....	53
Size.....	49	<b>U</b>	
Smart Links .....	3	Underline.....	49
Smart Search .....	15, 45	Understanding Profile View Subheadings.....	27
Sort order .....	26	Understanding the Chart Legend.....	28
Sorting the List View.....	26	Undo.....	40, 53
Sounds Like.....	41	Unlock.....	23
Source .....	14, 61	Use currently open presentation .....	25, 60
Spotlighting.....	43	Use narrow font.....	14, 53, 61
Spotlighting Search Results or Groups in the Chart View .....	43	Use Print Wizard .....	58
Start of Field .....	41	Using Click and Drag Scrolling .....	28
Storing Planning Charts .....	73	Using OrgPublisher in Accessibility Mode.....	28

Using Print Preview Enhancements to Print Charts	14, 61	Viewing the Matrix Reporting Hover Display	34
Using the My groups Tab in the Search Dialog	44	Views	3
Using the Smart Search Option	15, 45	<b>W</b>	
Using the Symbol Indicators in Tree View	29	Wall Chart	49
Using the Toolbar Search with Quick Search Results	16, 46	Wall chart preview	25, 60
<b>V</b>		Wall chart print preview	53
Value	5, 35, 39	Wall Style preview	14, 61
Values	7, 65	Warning	38
Vertical	51, 53	Workforce Analysis Graph	59
Vertical lines	53	<b>Z</b>	
View	22, 26	Zoom	3, 14, 61
Viewing a Chain of Command	17, 31	Zoom factor	28
Viewing Information in the Profile View	30	Zoom In	28, 53
Viewing Search Results in Microsoft Excel	44	Zoom Out	28, 53
Viewing the 9 Box Matrix	79	Zoom percent	53
Viewing the Hover Profile	33	Zoom to fit	51