



Professional & Platinum User Guide

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Introduction

Welcome to OrgChart Professional and OrgChart Platinum, the premiere application for all your chart creation needs. With its dynamic and powerful interface, the designing of any chart – from the layout of a single department to the hierarchy of an entire corporation – is just a few mouse clicks away.

This is possible because OrgChart's unique workflow allows complex structures to be organized simply, quickly and efficiently. Whether you prefer dragging and dropping or simply double clicking, changes ranging from the universal to the individual are immediately applied to whatever element you choose.

To further increase productivity, the work environment can be customized and rearranged to meet your personal preferences. Never use a menu? Simply hide it. Like a toolbar on the bottom instead of the top? Just re– dock it. Have what you want, when you want, where you want it.

To make certain that your charts get the attention they deserve, OrgChart also provides a wide range of themes, backgrounds, borders and unique shapes to make presentations that people don't just have to look at, but ones they *want* to look at (see below).



Moving on

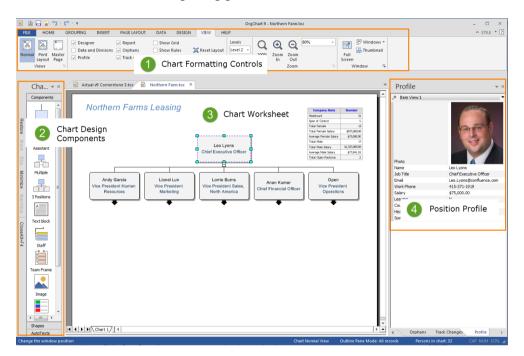
The following chapters will introduce you to the OrgChart work environment, teach you to master its powerful tools, and ultimately show you how to present your final, polished vision to the world. So let's get started and make those charts a reality!

(Please visit us online at <u>http://www.orgchartpro.com</u> for additional tips, tutorials and the latest events in the OrgChart world.)

Quick Start Guide: OrgChart overview

Let's start with a quick overview of the OrgChart application. Designed with you in mind, it is easy to use and easy to learn. OrgChart lets you quickly build simple or very complex organizational charts.

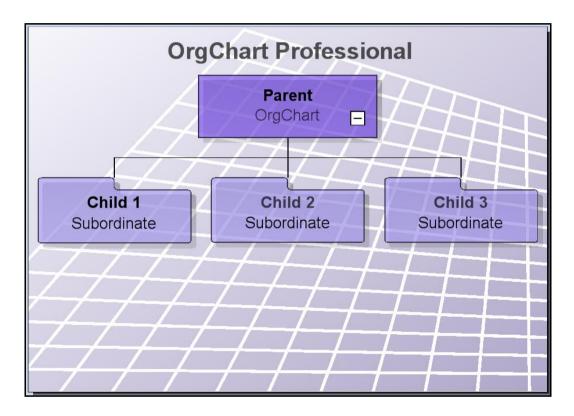
OrgChart also provides a wide range of themes, backgrounds, borders and shapes to make informative, attention– getting presentations.



- 1. Chart Formatting. The program is organized using Tabs that make it easy to complete a function or task.
- 2. Chart Design. This area contains drag– and– drop tools to add boxes and shapes to the chart.
- 3. Chart Worksheet. This area is where you will build your chart.
- 4. Position Profile. Any box selected will show its data in this window.

Quick Start Guide: Building a chart in minutes

Creating eye– popping org charts is fun and easy. In this section, we will show you how to build the following chart in three brief 5 minute tutorials.



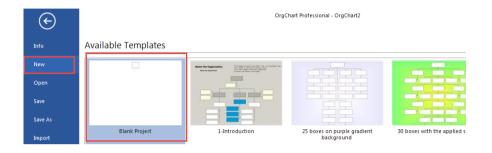
Note: details on each step and many other incredible functions, options and resources for chart creation are covered in– depth in other parts of this manual.

Okay, let's get started!

OrgChart Professional minutes

Part 1: Building a 3– D chart in 5 minutes

1. Open a new OrgChart by pressing the **File** Tab and then the **New** button.

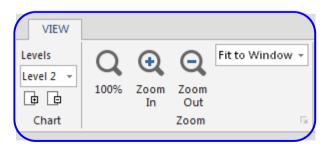


Or select the quick link at the top left corner of the program.



A new OrgChart will appear with a single component on screen.

2. Set the Zoom level to 100% by clicking in the **View** tab and using the **Zoom Toolbar** and either picking 100% from the drop down menu or using your mouse scroll wheel (recommended).



OrgChart Professional minutes

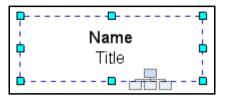
3. Go to the **Chart Design Palette** (on the left side of the screen) and open up the **Components** area (by clicking on the **Components** title bar).

Chart Design 🚽 👻	
Components	
Position Assistant	
Multiple 3 Positions	
Text block Staff	
Team Frame Dynamic Connector	
Image Legend Image	
Shapes	I
AutoTexts	

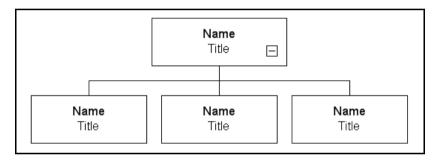
4. Scroll down the list of components and choose the component labeled **3 Positions**.

Components	
Position	Assistant
Multiple	3 Positions

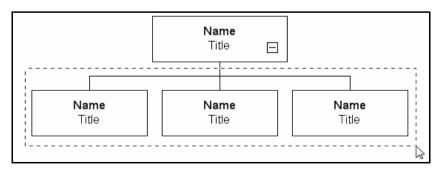
5. Holding down the Left mouse button, drag the **3 Positions** icon from the Components area and drop it directly onto the on– screen component (an icon will indicate that the component is in the correct position).



6. You will now have a parent component with 3 subordinate components. It will look like this:

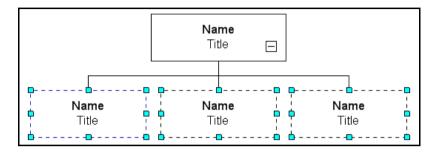


- 7. You now have a basic chart. But plain boxes are pretty boring, so let's jazz things up by giving our components unique shapes for each level.
- 8. Select the bottom three components by holding down the Left mouse button and dragging an area slightly larger than the components you want to select.



OrgChart Professional minutes

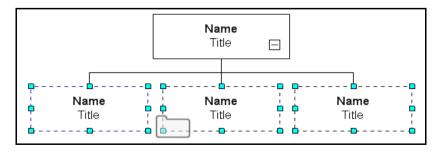
When you release the mouse button, the selected components will appear with dotted lines around them. (Note: sometimes they will also appear with either arrows or small boxes on each node – as in these illustrations – depending if you are in **Move** or **Resize** mode.)

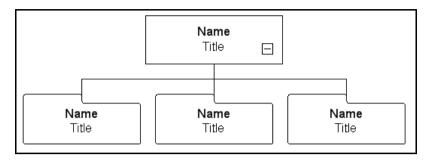


9. Open up the Shapes area of the Chart Design Palette by clicking on Shapes.

Component	5	
Shapes		
		^
Rectangle	Rounded Rectangle	
Chevron	Folder Shape	

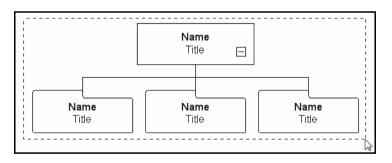
10. Scroll down and select **Folder Shape**. Just as you did in Step 4, hold down **the** Left mouse button, drag the **Folder Shape** icon from the **Shapes** area and drop it on to any of three highlighted components.



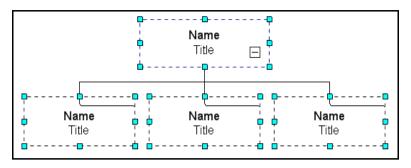


Release the icon. All the selected components will now have folder shapes.

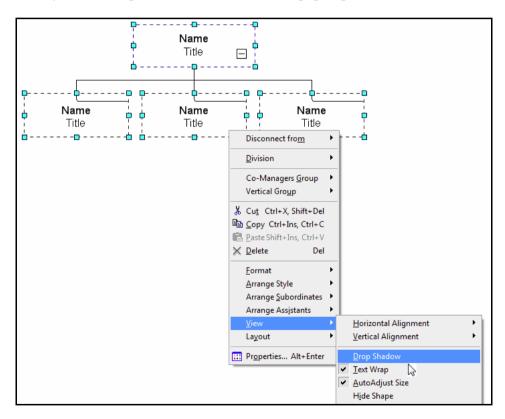
- 11. Now our chart has distinct shapes for each level, but it still looks flat. We'll give the components a nice three– dimensional feel by creating Drop Shadows.
- 12. To create Drop Shadows, select all the components by holding down the Left mouse button and dragging an area slightly larger than all the components (see below).



Release the mouse and they will all be selected.

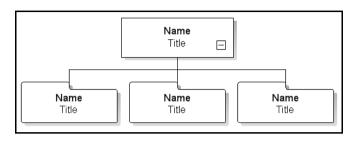


13. With all the components still selected, Right mouse click in an empty area of any of the components. This will launch a pop– up menu.



14. In the pop– up menu go to **View > Drop Shadow** (shown above).

15. Choose **Drop Shadow**. Click in an empty area of the chart to de– select the components. Notice that the drop shadows are present, giving the components a nice three– dimensional feel (see below).



16. The basic OrgChart is complete. Now let's save it. To save your chart, go to the **File** tab and click on **Save As**.

${ \bigeneduc}$		OrgChart Professional - OrgChart2
Info New	Save As	Save As
Open	Add a Place	greenbox step 1 GrogChatt Documentation Example GrogChatt for document
Save Save As		Documents @ OrgChart211 SA Demo 1 Desktop
Import Print		My Documents
Print Outline Share		
Publish	Browse	My Computer
Export Close		My Network Save as type: Projects ("toc) Cancel Save Sub-charts Save Current Chart Tab

17. When the **Save As** menu appears, type in the words "OrgChart Tutorial 1" and click **ENTER**.

Congratulations! You have just created an OrgChart in record time! When you are ready, move on to the next 5 minute segment where you will learn how to enter information into the chart you just created.

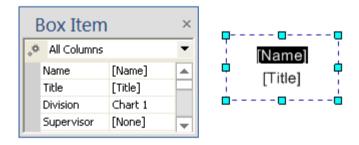
Part 2: Customizing data fields in 5 minutes

This lesson uses the chart you created in Part 1. To load that chart, go to **File** tab and click on **Open**, choose the file named *OrgChart Tutorial 1* and click **Open**. The chart will appear in the Main Work area.

In the previous lesson, you learned how to make a 3D chart with components that were unique on the outside. Now it is time to learn how to make components that are unique on the inside.

The different areas inside a component are known as data fields. Data fields can hold many types of information including text, attachments and even images. In this exercise, we are going to customize the **Name** and **Title** data fields of our components.

Although there are many ways to do this, we will concentrate solely on using the **Box Item** menu (located by default on the lower left side of the screen, directly below the **Chart Design Palette**) to make our changes.

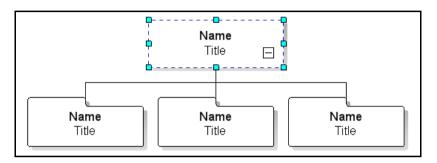


Box Item pane shows data fields contained in a box record

Important: the Box Item menu only becomes active when a component is selected. If no component is selected then it will appear empty with no data fields present.

Now that you are familiar with the basic principles of data fields, let's move on to the step– by– step process of using the **Box Item** menu to customize the names and titles of each component.

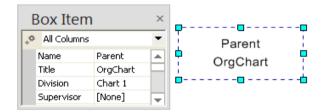
1. Let's start by naming the Parent component. To do this, click on the Parent component (the top one).



Notice that the **Box Item** menu is now active and is displaying the component's data fields.

2. To alter a data field, simply double click the field inside the **Box Item** menu (to make it editable) and type the new information into the (highlighted) area.

With the *parent* still selected, **double click** inside the *Name* field in the **Box Item** menu, type in the word "Parent" and hit the **ENTER** key.



Box Item pane with "Parent" in Name field and "OrgChart" in Title field

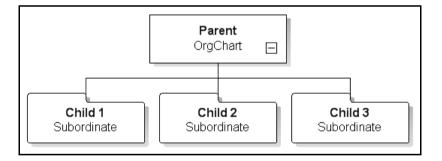
Hitting **ENTER** applies the change to the on– screen component. It also highlights the next lower data field in the **Box Item** menu and makes it editable (in this example, the *Title* field).

- 3. In the Title field, type in the word "OrgChart" (see above) and hit **ENTER**. The title will appear on– screen.
- 4. Repeat Steps 2 & 3 for each subordinate component.

To do this, select the subordinate component on the left side and type "Child 1" into the Name field and "Subordinate" into the Title field.

Do the same with the other components, typing "Child 2" and "Child 3" into each respective *Name* field and "Subordinate" into the *Title* fields of both. Type in both the *Name* and *Title* fields for each subordinate component BEFORE moving on to the next.

Notice that OrgChart remembers the last entry entered into a field (regardless of component) and displays it – making re– typing the same information unnecessary.



When you are done, the chart should look like this:

5. To save this chart, go to the **File** tab and click on **Save As**, type in the name "OrgChart Tutorial 2" and click **Save** (also see *Part 1, Steps 15 & 16*).

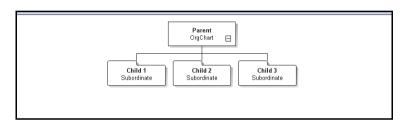
Congratulations! You have now learned the basics of data fields and how to customize the names and titles for each component. The final tutorial in this section will show you how to add colors, titles, designs and more to give your chart a polished, professional look.

Part 3: Making your chart look professional in 5 minutes

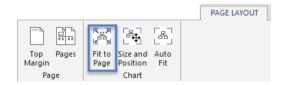
This lesson uses the chart built in Part 2. To load the chart, go to **File > Open**, choose the file named **OrgChart Tutorial 2** and click **Open**. The chart will appear in the Main Work area.

You now have a fully functional OrgChart. Now let's snazz it up by adding colors, a design, a title and even arranging all the elements in an eye pleasing fashion.

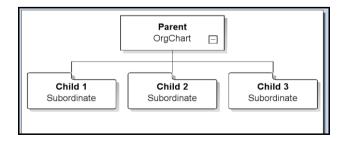
1. First, let's set up our work area so we can see the entire chart. To do this, go to the **Zoom Toolbar** on the **View** tab and choose **Fit to Window** from the drop down menu, or click in the box and use the mouse scroll wheel.



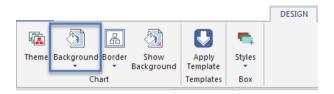
2. Next, let's automatically resize the components so they fill the page nicely. To do this, simply click the **Page Layout** tab and click the **Fit to Page** button.



The chart will now appear like this (see below):



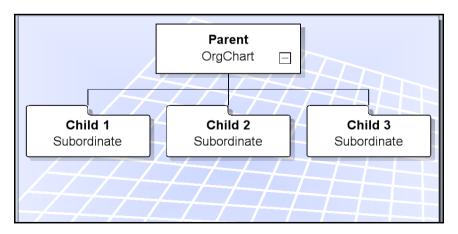
3. Now that the basics of our components are set up, it's time to put them on a nice background. Go to the **Design** tab and select **Background**.



4. Scroll down and select **Grid**.

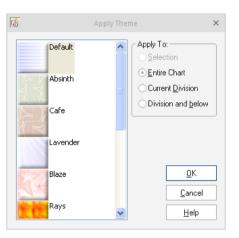
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Laver	ider	Cancel	
	~	<u>H</u> elp	

5. To apply the theme, hold down the Left mouse button, drag the **Grid** icon from the **Backgrounds** area and drop it anywhere on the chart. Notice that an attractive grid design now appears behind the components (see below):



6. Now let's apply some colors. There are many ways to add colors to a chart and its components, but the easiest is to simply use a **Theme**. Themes are color coordinated, professional designs that can be applied by simply dragging and dropping them on to a chart.

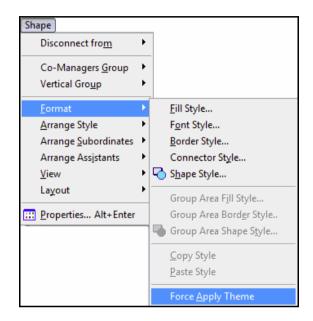
To apply a theme, go to the **Design** tab and click on the **Theme** icon.



7. Important: in default mode, themes do not affect the look or color of the components.

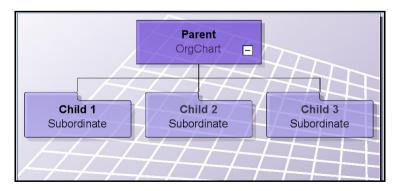
To have components adopt a theme's attributes, first select all the components by holding down the Left mouse button and dragging an area slightly larger than all the components, or by clicking **Ctrl+a**.

Once all the components are selected, right click over one of them and select **Format** and then **Force Apply Theme** (see below):



Choosing this will force the theme to be applied to the components in addition to other chart (and workplace) elements.

8. Scroll down and select **Lavender**. Hold down the Left mouse button, drag the **Lavender** icon from the **Themes**. Notice that a color scheme and pattern is applied to the entire chart and all the components (see below):



Remember, backgrounds and borders can be applied using the same steps.

9. The next step will be to name our chart. To do this, go to the **Chart Design Palette** and click on the **AutoTexts** bar.

Components	
Shapes	
AutoTexts	
CHART -	
Chart Title	Division Title

Select **Chart Title**. To apply, hold down the Left mouse button, drag the **Division Title** icon from the **AutoTexts** area and drop it in the center of the chart below the components. (Notice that the default name of "Chart 1" appears in the element).

10. To change the name that appears in the **Chart Title AutoText** element, go to the tab at the bottom of the chart.

Chart 1	OrgChart Professional

You can change this by double clicking on the tab and then typing the new name (i.e., *OrgChart Professional*)

11. Alternately you can click on the **Data Outline View** at the bottom of the Main Work area, then click on the **Divisions View** tab (see below).

1	Chart 1					
	Chart 1					
	Data View Divisions View					

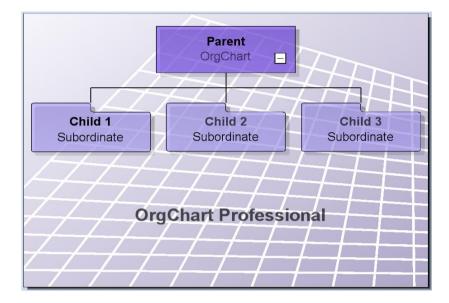
12. Click on the word "**Chart 1**" and Right mouse click to launch a pop– up menu (see below):

Rename Chart/Division
Enter new name
OrgChart Professional
OK Cancel

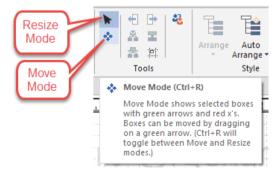
- 13. Type in the words "OrgChart Professional" and hit **Enter** or click **OK** to apply the changes. The new title will appear in the on– screen *AutoText*.
- 14. The text in the AutoText Chart Title element is too small, so to make it larger, click in the AutoText. A dark box will appear around the text to indicate that it is editable. With the text still selected, go to the **Home** tab on the **Font** section and do the following:
 - a. Click on the *Font Type* drop down box and choose **Arial** (if this is not already present by default).
 - b. Click on the Font Style drop down box and choose Bold.
 - c. Click on the *Font Size* drop down box and choose the number "**28**" (see below).

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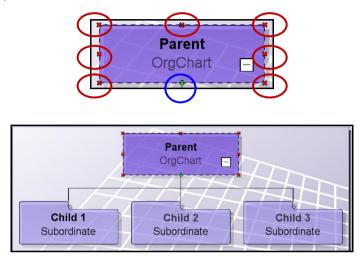
15. The changes will be applied automatically. Your chart will now appear very similar to the following example:



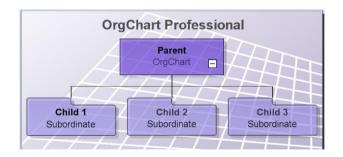
- 16. We're almost done! All the elements are now present; now we just have to arrange them in an attractive pattern. To do this, we will move the components to the middle of the chart and center the title.
- 17. Components can only be moved when you are in Move mode. To enter Move mode, go to the Home tab and click the Move mode button (located in the Tools section). (Note: the Move mode button is a toggle switch which turns on and off if selected repeatedly, so you may need to press it twice to get into Move mode.)



18. To move a group of components, click on the group's parent. Green arrows will appear on the parent's nodes to indicate which directions are available for movement. Red "**x**"s will indicate directions that are not available (see below).



- 19. Grab the green down arrow on the parent component and while holding down the Left mouse button drag downward to place the entire group in the middle of the chart.
- 20. To center the title, simply grab the title (the words "OrgChart Professional") and holding down the Left mouse button, drag it to the center of the screen. Your final result should look like this:



Congratulations! You have completed your first polished OrgChart! For more detailed information on all of the processes covered in this tutorial, please see the rest of the manual. Additional tips and resources are also available online at <u>http://www.officeworksoftware.com</u>

Chapter 1: OrgChart basics

This chapter will introduce you to the OrgChart environment, teach you how to customize the workspace and outline many powerful and diverse chart making tools. (*Note: screens may appear slightly different on different systems.*)

Welcome Screen

ർ Welcome to OrgChart 7 × Platinum Edition Description Create a new chart New Chart Onen Import Wizard From Template Example charts Chart Wizard Watch the tutorial to learn now ΟK Cancel Show Welcome screen on startup

When OrgChart Professional loads, the user is greeted with the Welcome Screen.

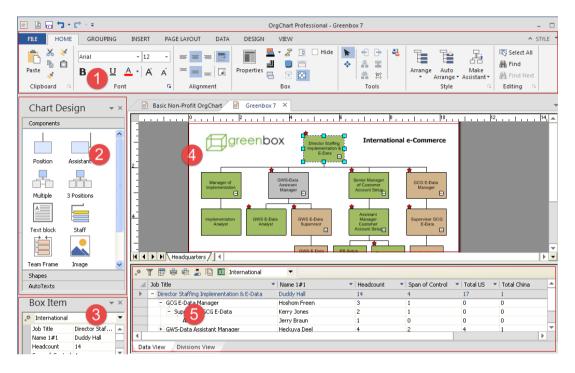
This interface is active by default and contains a variety of tools to quickly and efficiently facilitate the chart making process.

Activating and deactivating the Welcome Screen

- 1. **To deactivate the Welcome Screen** uncheck the "Show Welcome Screen on startup" box. (Once this box is deactivated, the Welcome Screen will no longer appear automatically when OrgChart loads.)
- 2. To activate the Welcome Screen go to the File tab and select Options. On the General screen, check the "Welcome Screen Display on application startup" box.

Interface Overview

OrgChart's powerful interface



- 1. **Chart Formatting** The program is organized using Tabs that make it easy to complete a function or task.
- 2. Chart Design contains drag– and– drop tools to add boxes and shapes to the chart.
- 3. **Box Item** any box selected will show its data in this window.
- 4. **Chart Worksheet** area where you will build your chart.
- 5. **Data Outline** view views of the data behind the org chart.

NOTE: this dynamic interface can be customized to match your own creative style. It may also appear different on different hardware configurations and operating systems. Certain buttons and interfaces may also be present or absent and appear in different combinations depending upon your particular version of OrgChart.

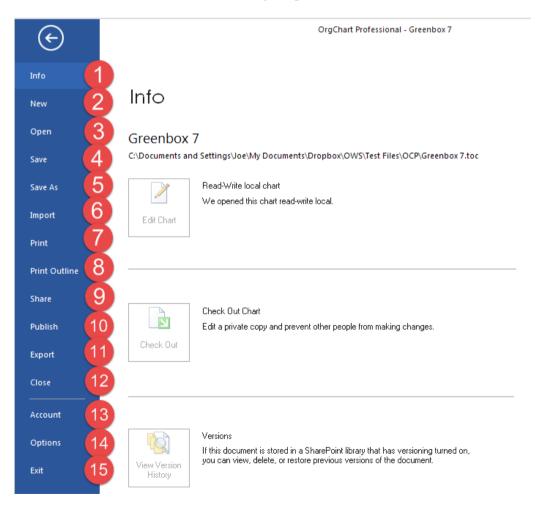
Toolbars and Menus

All tools are available through the program's ribbon interface.

FILE HOME GROUPING	INSERT PAGE LAYOUT DAT	A DESIGN VIEW		^ S
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File Tab

The File tab contains all of the "back stage" options.



- 1. Info information about the chart properties, author, number of records.
- 2. **New** Use this command to create a new chart from a blank sheet or a template. You do not need this command if you are importing data for a chart.
- 3. **Open** Opens a chart previously created from the desktop, a network drive, SharePoint, DropBox or OneDrive.
- 4. **Save** Saves your chart file in .toc (native chart format) or .ocpt (template) formats.
- 5. **Save As** Saves chart with a different name or to other locations, such as SharePoint or Office365 OneDrive.
- 6. **Import** Launches the data import wizard.
- 7. **Print** Sends chart view to a print device.
- 8. **Print Outline** Prints the data outline portion of the chart view
- 9. **Share** Sends the native chart file by email.
- 10. **Publish** Launches the publish wizard for outputs such as MS Office, interactive PDF, HTML5, Flash and more.
- 11. **Export** Launches the Export wizard, sending chart data to various output formats.
- 12. Close Closes the current chart file.
- 13. Account Contains help resources, options and program update functions.
- 14. **Options** allows setting of options for startup, checking for updates and more.
- 15. **Exit** Quits the program.

Top Toolbar

These icons in the top left corner of the interface are convenient shortcuts for frequently used commands.



The Top Toolbar commands include:

- 1. New Chart starts a new chart.
- 2. Save Chart stores the chart for later retrieval.
- 3. **Undo** Undoes the previous operation.
- 4. **Redo** Redoes the previous operation

Home Tab



1. Clipboard Section

- a. **Format Painter** an amazingly powerful tool that takes the visual attributes of a component (size, shape, text fonts, etc.) and applies them to another component or group of components. Fantastic for assigning unique formats to positions, divisions and professions.
- b. **Format Painter Wizard** Copies properties of a box to any scope within the chart. This wizard also has an option for using a conditional format using a data value or using a pre– chosen rule.
- c. **Copy Image to Clipboard** Takes a snapshot of the chart image and copies it to the clipboard for pasting into an email of document.

2. Font selection and formatting

a. Font and Size – Determines font, color and size.

3. Alignment

- a. **Horizontal/Vertical** Determines horizontal and vertical text alignment
- b. Word wrap For any text field, a space in a character string may be used to wrap text and thus reduce box width.
- c. **Show label** Shows or hides the name of the field.

4. Box operations

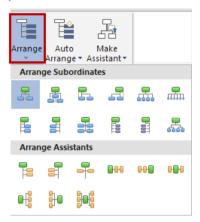
- a. **Properties** Shows both the box data format and the box data contents. Box layout is used to show and hide fields. Edit Data may be used to add or change box content.
- b. **Box formatting** Enables color of box outline, connectors, shadow and more.

5. Tools

- a. **Move mode** allows components to be moved on the chart. It affects components only and is only active when a component is chosen (see Moving Components for details).
- b. **Resize mode** allows components to be resized on the chart. It affects components only and is only active when a component is chosen (see Resizing Components for details).

6. Arrangement Styles

a. Pick a layout style for the boxes by selecting a supervisor and then one of these layouts.

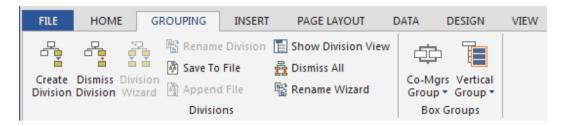


7. Edit

a. Shortcuts to **Select** and **Find**

Grouping Tab

The **Grouping** tab offers ways to break down larger charts into hyperlinked Divisions (also known as sub– charts). Other grouping functions let you optimize chart space, to show as many boxes as possible on a given page.



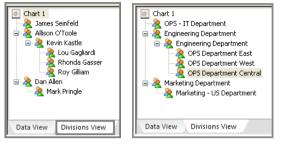
1. Divisions

a. Create Division – Select any manager with subiordinates. The Create Division command will create a separate hyperlinked chart page. Division boxes have a large arrow in the lower portion of the box. Clicking on this arrow displays the subordinate boxes.



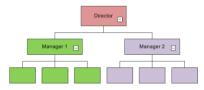
- b. **Dismiss Division** Select any Division box. This command will eliminate the hyperlinked chart page, showing all of the subordinate boxes on the same page with the manager.
- c. **Division Wizard** Using this wizard you can automatically set division pagination for the entire chart file.
- d. **Save to File** Select a box that is a division. This command creates a chart file with only the detail for the selected division.
- e. **Append File** Adds boxes and associated data from another chart file.
- f. **Show Division View** Displays the list of Divisions in the lower pane of the application.

g. **Division Rename Wizard** – Any data field can be used to name the divisions appearing in the outline view. The result from this wizard shows in the division view and the Division Title autotext field.

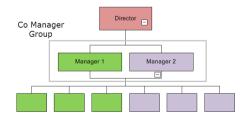


Divisions View

- 2. Box Groups
 - a. **Co-Managers Group** Two boxes can be joined to form a manager group.

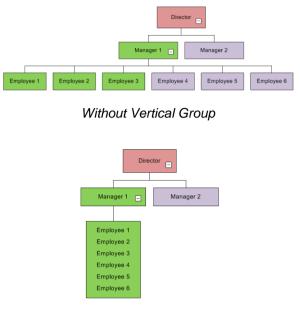


Without Co-Manager Group



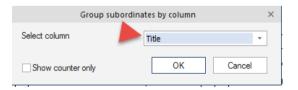
With Co-Manager Group

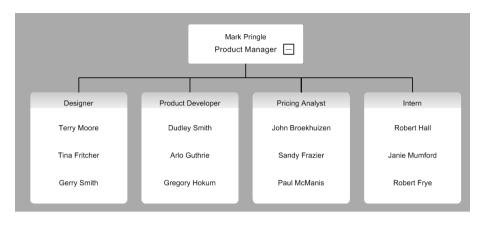
b. Vertical Group – When looking to show many boxes on a page the vertical Group offers an efficient use of space.



With Vertical Group

c. **Auto Summary Group** – You can group boxes according to a field such as title. Right click on the supervisor box ans select Vertical Group / Group by. The field you select automatically determines the grouping of boxes.



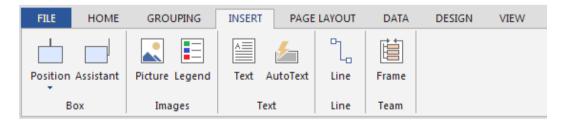


d. **Show Group Counter Only**: Another option is to show only the count for the number of records with the same title.

	1	•	
	Mark P Product N	ringle Manager —	
Designer x 3	Product Developer x 3	Pricing Analyst x 3	Intern x 3

Insert Tab

The **Insert** tab allows you to add boxes, images, text and special connectors to your chart.

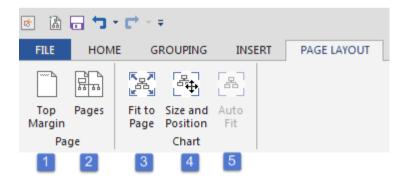


- 1. **Box**
 - a. Insert a **Position box** or **Team Frame.**
 - b. Insert an Assistant box.
- 2. Images
 - a. Insert a **Picture** Adds any supported image type (i.e., .jpg, .png, gif, etc.) to your chart background.
 - b. Insert a **Legend** Adds a legend graphic, either from premade Rules of by manual creation. (Note: once a legend is created it cannot be edited. Rather it must be re– created from scratch).



Page Layout Tab

The Page Layout tab controls how charts are positioned and sized on each page.



1. **Page**

- a. Top Margin Sets all pages with a specified top margin.
- b. **Pages** Change pages height and width for larger charts.

ta La	yout Print Pages ×
Fit Chart On	dth 1 🔹 Pages in Height
Orientation Orientation Orientatit Orientation	Apply to <u>Entire Chart</u> Current <u>D</u> ivision
<u> </u>	<u>Cancel</u> <u>H</u> elp

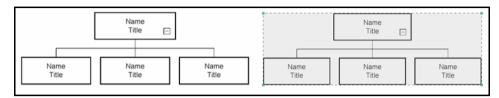
2. Chart

a. **Fit chart to pages** – resizes the components on a chart to fill up as much of the available space as possible (see below).



Same chart BEFORE (left) and AFTER (right) "Fit Chart to Pages" applied

b. Size and Position Chart – creates an area around the entire chart which allows the chart – as a whole – to be moved and resized. (The moveable area appears as a gray box with nodes at the corners – see below.)



Same chart BEFORE (left) and AFTER (right) "Free move and resize" mode applied

- **To move the chart** place the mouse cursor in the gray box, hold down the Left Mouse Button and drag to the desired location.
- To resize the chart place the mouse cursor over one of the nodes, hold down the Left Mouse Button and drag to the desired size.
- To exit Free Move and Resize mode click the button again to toggle the mode on and off.

Data Tab

The Data tab provides access to the data import and export wizards, as well as the Platinum **Markers** features and the **Compare** utility.

FILE	HOME	E GROU	JPING	INSERT	PAGE LAYOU	T DATA	DESIGN	VIEW	HELP								
$\mathbf{\tilde{N}}$		Ê.	器 Resyr 器 Resyr	nc Data nc Properties	.				3	X	x	AB	AB	2			×
Import	Chart . Data Set	Automation			Manage C	onditional Ma ormatting	rkers Re	oorts Fas Repo	Dynamic ts Reports		Export Summary Fields		Compare to Active	Track Changes	PCN Report	Accept Changes	Reject Changes
	Imp	ort & Confi	guration			Rules		Analy	ze	1	Export	Com	ipare		Track (hanges	

1. Import and Configuration

- a. **Import** Perhaps the most powerful feature of OrgChart. This command starts the Import Wizard and allows import of various file types to automatically create the chart.
- b. Chart Data Set Opens the chart's database. From this dialog you can add fields and calculations, or change the name of any data field. Note: Any changes made in the Chart Data Set impact the entire chart file, nor just a single box. Any field added becomes available to all boxes in the chart file.
- c. Automation This wizard configures a script for automating the organization chart update and publishing process. The script that is produced from this procedure includes two files; a .bat file and a .ini specifications file. Together these files can be used with Windows Task Scheduler to kick off functions such as data resync and publishing report outputs.
- d. **Resync Data** If External data has been changed this option will update the chart database. Only if data has been imported is Resync Data an option.
- e. **Resync Properties** Resync Properties are the configuration options for Resync Data.

2. Rules

a. **Markers and Rules** – let you color boxes based on data values present in each box. Markers set the possible box colors, and Rules set the data conditions under which the Markers are applied. Markers and Rules work together. You must define a Rule if you want to apply a color Marker to boxes. b. **Conditional Formatting** – a box format style can be configured based upon a rule to instantly respond to a change in data.

3. Analyze

- a. **Reports** Custom data reports can be created to show any chart data in tabular form. These reports may be printed or output to Excel for additional customization.
- b. **Fast Reports** Fast Reports is a special reporting module that creates custom reports and photo directories.
- c. **Dynamic Reports** A flexible, interactive report writer that can sort, filter, group and summarize on the fly. Results of the report can be exported to Excel for additional operations or published to PDF.

4. Export

- a. **Export** This command starts the Export Wizard. Any data that is imported, calculated or added manually to the chart can be exported to Excel or a database.
- b. **Export Summary Fields** Any hierarchical totals for calculations can be exported.

5. Compare

- a. **Compare Tool** This utility will compare any two chart files allowing you to see any and all record and field differences.
- b. **Compare to Active** Lets you compare any chart file to the one that is currently open and in view.

6. Track Changes

- a. Track Changes- This enables identification of any fields that change, or records added or records deleted. Results show in a separate pane titles 'Change Tracking'. Current values, prior values and author are included in the tracking.
- **b. PCN Report** After any change the Personnel Change Notification document is generated for management approval.
- c. Accept Changes cumulative changes are itemized in the tracking pane. These changes can be accepted in bulk.
- d. Reject Changes Or changes can be rejected in bulk.

Design Tab

The **Design** tab offers borders, box templates and backgrounds for your charts.



1. Chart Design

- a. Themes enables color schemes for your chart boxes and data.
- b. **Backgrounds** lets you set color or image backgrounds for a chart page.
- c. **Show Background** shows or hides a background previously applied.

2. Templates

a. **Apply a Template** – use a style from another chart file or template file. Note that OrgChart template files have an .ocpt file extension. These template files do not carry any data; they only have style, color and background.

3. **Box**

- a. **Preferred Box Styles** These box styles include color and data field layouts.
- b. Add to Preferred Styles This command lets you add any box style you have created to the preferred style library.

View Tab

The View tab controls general visualization of the chart.

FI	E.	ном	IE (GROUPING	INSERT	PAGE LAYOUT	DATA	DESIGN	VIEW	HE	LP							
Nor	mal	Print I ayout		 Designer Data and Profile 		 ✓ Report ✓ Orphans ✓ Track Changes 	Show G	Rules	📓 Reset La	yout	Levels Level 1 🔻	Q 100%	Zoom In	Q Zoom Out	Fit to Window 👻	Full Screen	문 Windo 과 Thumb	
	Vi	ews	5			Show				5	Chart			Zoom	5	N 1	Vindow	- 5

[Home Tab] Zoom Toolbar

From here, you can control the magnification of the chart area.



The Zoom Toolbar commands include:

- 1. **Zoom in** increases magnification.
- 2. **Zoom out** decreases magnification.
- 3. **Magnification drop down menu** lists default magnifications.
- 4. **Background visibility** toggles Backgrounds on and off. (Note: the Background Visibility button will only become active after a Background has been applied.)

View Tab

This tab controls the visual appearance of the work area.

FIL	E H	OME	GROUPING INSERT	PAGE LAYOUT	DATA DESIGN	VIEW HE	LP							
Nor	nal Prin				 Show Grid Show Rules Show Status Bar 	洒 Reset Layout	Levels Level 1 👻	Q 100%	Com Zoom In	Q Zoom Out	Fit to Window 👻	Full Screen	🗗 Windov 🛃 Thumbr	
	Views		ž.	Show		E.	Chart			Zoom	E.	v	Vindow	- 5

The Select View Toolbar commands include:

- 1. Views
 - a. **Normal view** the default chart creation view (visually simple and uncluttered).
 - b. **Print layout view** optimized view for printing (with "print safe" borders, extra tools and the ability to show how a chart is spread across multiple pages).
 - c. Master Page view a powerful mode which allows universal changes to be applied to every page of a multi– page chart. It is extremely valuable for creating titles, logos, division names, etc. you wish to repeat on every sheet. This view only reflects universal changes so elements which change from page to page such as individual chart elements and components are hidden in this mode. They reappear once Master Page view has been deactivated.

2. Show

- a. **Reset Layout** returns the program interface to its original layout. This feature is helpful in case you have closed some of the windows and panes and want to have access to them again.
- b. **Designer** Show the chart design components on the left side of the screen.
- c. **Profile** Preciously named 'Box Item' this window shows the data details for any org chart box selected.
- d. **Report** Shows the Dynamic reporting pane for report output.
- e. **Orphans** Shows the window that can be used to identify people without supervisors. It also serves as a staging area or 'parking lot' for holding people until you have decided where to place them.

3. Chart

a. **Levels -** If multiple levels of an organization are showing the levels selector can limit the ones that appear

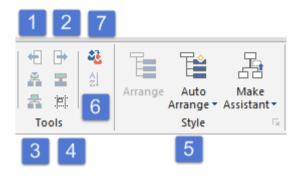
4. **Zoom**

5. Window

a. Window Options – Enable presentation of two charts side-by-side.

[Home Tab] Arrange Toolbar

The Arrange commands are on the Home tab in the Tools and Style groups. These control how certain Components are arranged on the chart.



The Arrange Toolbar commands include:

- 1. **Move Sibling Left / Up** moves equal subordinates left (or up) the same level.
- 2. **Move Sibling Right / Down** moves equal subordinates right (or down) the same level.
- 3. **Reset positioning** this returns a subordinate component back to its previous optimal location after having been repositioned.
- 4. **Reset subordinates' positioning** this returns the subordinates to their optimal location after having been manually repositioned. The subordinate's *parent* must be chosen for this button to become active.
- 5. AutoArrange shapes this automatically arranges components in a logical order.
- 6. **Sort** Select a manager with subordinates. This command will let you sort by up to three fields.
- 7. **Replace Person** When replacing a person deep in a hierarchy this command offers a way to transfer data from one position to another. This function is best used in a position-based org chart for succession planning purposes.

[Home Tab] Font and Alignment Toolbar

This toolbar controls font and text alignment attributes:



The Format Toolbar provides the following font controls:

- 1. **Font type** a drop down menu with a list of available alphabets.
- 2. Font style a drop down menu with choices on letter orientation and weight.
- 3. Font size a drop down menu for choosing the size of the letters.
- 4. Font color this launches a palette of pre– defined and custom color options.
- 5. Left align text text starts on the left side and expands to the right.
- 6. Center align text text starts in the middle spreads evenly to the sides.
- 7. **Right align text** text starts on the right and expands to the left.
- 8. Vertical top align places text at topmost position possible
- 9. Vertical center align places text at center of field
- 10. Vertical bottom align places box at bottom of field
- 11. Word Wrap allows text to wrap where a space in the character string occurs.
- 12. **Show Title** shows the field name with a colon before the text. (E.g., *Headcount: 32*)

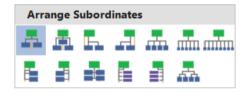
[Design Tab] Themes Drop Down Menu

Clicking on the Theme icon opens up a list of Themes. (These themes can also be found in the Themes area of the **Chart Design Palette**.)

СÊ	Apply Theme	×
Default	Apply To:	
Absinth	● <u>E</u> ntire Chart	
Cafe	O Division and <u>b</u> elow	
Lavender		
Blaze		
Rays	<u>C</u> ancel <u>H</u> elp	

[Home Tab] Arrange Subordinates Toolbar

Use this menu to automatically arrange Subordinates in a variety of patterns.



Important: the Parent component must be chosen for the Arrange Subordinates functions to become active.

The following arrangement options are available:

- 1. **Horizontal center align** distributes the subordinates equally on each side; creating a very balanced pattern.
- 2. **Horizontal stagger** creates a 'stair– step' pattern starting with the first subordinate higher, followed a lower component, then followed by another high one. This pattern is repeated with all the subordinates in a chain.
- 3. **Horizontal right align** places all the subordinates in a horizontal line to the lower right of the Parent.
- 4. **Horizontal left align** places all the subordinates in a horizontal line to the lower left of the Parent.

- 5. Horizontal Four Columns (Wide Organization) equally distributes the first four subordinates on a horizontal line beneath the Parent. Any additional subordinates will appear in a new row beneath the first, using the Parent as the center. A new row is formed every time the maximum number of four subordinates is reached. Note: this button only becomes active after four subordinates are present. With less than four, the button is grayed out.
- 6. **Horizontal Six Columns (Wide Organization)** equally distributes the first six subordinates on a horizontal line beneath the Parent. Any additional subordinates will appear in a new row beneath the first, using the Parent as the center. A new row is formed every time the maximum number of six subordinates is reached. Note: this button only becomes active after four subordinates are present. With less than four, the button is grayed out.
- 7. **Horizontal Eight Columns (Wide Organization)** equally distributes the first eight subordinates on a horizontal line beneath the Parent.
- 8. Vertical align right places all the subordinates in a vertical line to the lower right of the Parent.
- 9. Vertical align left places all the subordinates in a vertical line to the lower left of the Parent.
- 10. Vertical side- by- side stacks the subordinates side- by- side beneath each other (very much like stacking crates). It is similar to Align center in that it attempts to create a balanced pattern using the center for alignment.
- 11. Vertical staff right affects only Staff components and places all staff elements on a vertical line facing to the right of the Parent.
- 12. Vertical staff left affects only Staff components and places all staff elements on a vertical line facing to the left of the Parent.
- 13. Vertical Four Columns (Wide Organization) equally distributes the first four subordinates on a horizontal line beneath the Parent. Any additional subordinates will attach vertically to the component above it, moving from left to right, until the maximum number of four components per row is reached. After that number, the process begins again on a new row. Note: this button only becomes active after four subordinates are present. With less than four, the button is grayed out.

Vertical hanging connector options – You can change the spot where the subordinate connects to the supervisor box to create a more horizontally

compact chart. Right click on the Supervisor box and select Arrange Subordinates / Vertical Arrange Options.

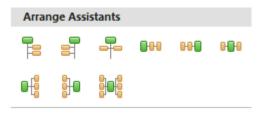
₨	Vertical arrange options	×
Bottom pin	shift from the center of the box (%)	70
	1	
Box shift fr	om the pin position ($\%$)	0
	ок	Cancel

Based upon settings you choose these may be the results:

	
Mark Pringle Product Manager	Mark Pringle Product Manager
Designer x 3	Designer x 3
Product Developer x 3	Product Developer x 3
Pricing Analyst x 3	Pricing Analyst x 3
Intern x 3	Intern x 3

Arrange Assistants toolbar

This menu is used to automatically arrange Assistants in a variety of professional patterns. (*Note: Assistant buttons only_become active when more than one Assistant component is attached to the same Parent.*)



- 1. Assistant align right Places all assistant components on a vertical line facing to the right of the Parent.
- 2. Assistant align left Places all assistant components on a vertical line facing to the left of the Parent.
- Assistant side- by- side Stacks the assistant components side- by- side beneath each other (very much like stacking crates). It is identical to normal Side- by- side except it only works on Assistant components.
- 4. Align Assistants horizontal right Stacks the assistant components on the same level and side– by– side horizontally to the right of the Parent (very much like the links in a chain).
- 5. Align Assistants horizontal left Stacks the assistant components on the same level and side– by– side horizontally to the left of the Parent.
- 6. Align Assistants horizontal side- by- side Stacks the assistants on the same level and evenly* on either side of the Parent component.
- 7. Align Assistants vertical right Stacks all of the assistants on top of each other to the right of the Parent (very much like stacking crates, but only on one side).
- 8. Align Assistants vertical left Stacks all of the assistants on top of each other to the left of the Parent.
- 9. Align Assistants vertical side- by- side Stacks all of the assistants on top of each other evenly on either side of the Parent.

Note: Assistants are only stacked evenly if there are an even amount of components. If an odd number of assistants are present, then one more assistant will appear on one side of the Parent than on the other.

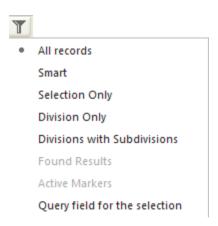
Outline View Control Bar

The Outline View Control Bar sits atop the Outline View area and provides a convenient, central location for buttons and menus that are also found in other areas of the program (see below):

°,	T	Ð	÷	R	2	Ì	XI	All Columns	•	

The Outline View Control Bar contains the following functions (from left to right):

- 1. Edit Display Options Show hierarchy or not, show column icons or not.
- 2. Filter Options Outline data view records can be filtered for display scope.



- 3. **Define or Edit Current Data View** launches the Edit Data View (Static) menu. By modifying the currently selected data view, this interface determines what data fields appear in the Box Item and Outline View areas. It also determines the order in which these fields are displayed.
- 4. **Print Data Outline Pane** launches the standard Windows print interface. This prints the names and values of the data fields currently displayed in the Outline View area.
- 5. **Print Preview Outline** launches a preview screen showing how the data fields in the currently displayed Outline View area will appear when printed out.
- 6. **Locate Person** displays where a person's component is located. It automatically expands the division which contains the person and centers their component on the screen.
- 7. Copy takes information from one area and makes it available in another.
- 8. **Export Wizard** launches the Export Wizard which takes the user step-bystep through the process of exporting data fields to various formats and locations. (For more information on exporting data, please see the Export Wizard section of this manual.)
- Data View Quick Selector this drop down menu allows for the rapid selection of available data views. This menu performs the same function as the Current Box Layout drop down menu available in the Box Item area.
- 10. **View Options** provides a choice of the different display options available in Outline View.

Docked Menus

Two of OrgChart's most powerful and commonly used menus are the **Chart Design Palette** and the **Box Item** menu. By default, both of these are docked on the left side of the screen. (Note: both of these menus can be "un– docked" and dragged almost anywhere in the workspace.)

Chart Design Palette

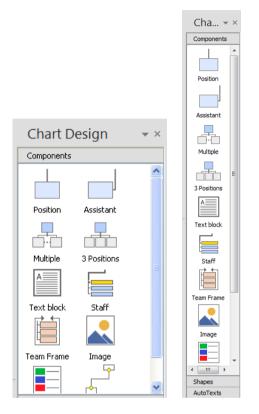
This is where most of the actual chart creation takes place. The **Chart Design Palette** contains the following expandable areas:

- 1. **Components** the building blocks of a chart. Components can be moved, linked, hidden and resized. By default, they display an entry's Name and Title but can show an almost infinite range of information.
- 2. **Shapes** styles that modify a component's shape. IMPORTANT: a shape can only be applied to components that are already present on the chart.
- 3. AutoTexts boxes which contain the titles of *Chart* and *Division* which can be automatically applied to the chart and customized.

Note: Information inside an AutoText can only be changed from the Divisions View. To change an AutoText, do the following:

- a. Place an AutoText on the Chart.
- b. Open up Divisions View.
- c. In Division View, highlight the name of the level the AutoText is on. The level will have a default name such as 'Chart', 'Division 1', 'Division 2', etc.
- d. Press the **F2** key to make the default Division name editable or right– click to rename.
- e. Input the text you wish to appear in the AutoText.
- f. Hit **ENTER** to apply the change.

To expand an area of the **Chart Design Palette**, click on an area's title bar (In the example below, the Components section has been expanded by clicking its title bar)



Position Profile (Previously Box Item) menu

Dynamic in nature, this dialog displays the Data Fields for any currently selected component. (Note: the **Box Item** menu will only become active after an on screen box has been selected.)

	Position Profile	×
[Name] [Title]	o ^o Phone Directory	•
	Orphans Track Changes Profile	>

Data Outline View

This area is located at the bottom of the work area. It allows the centralized management of component information. It can also be used to connect components, assign Supervisors, and change Data Field content. (Note: Data Outline View can only be toggled "on" and "off" through the **Data View** and **Divisions View** tabs.)

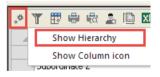
Data Outline View can display information in either a list or hierarchy form.

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🖌 Name 🔻 Title		Name 🖵	Title
- Supervisor [Title]	:]	Supervisor	[Title]
- Subordinate 1 [Title]]	Subordinate 2	[Title]
Subordinate 2 [Title]]	Subordinate 1	[Title]
Data View Divisions View		a View Divisions View	

Data Outline View with Hierarchy ON

Data Outline View with Hierarchy OFF

To toggle **Hierarchy View** on and off go to the **View** tab and select the leftmost icon. Click on **Show Hierarchy.** (A check mark will appear next to the title to indicate if the view is on or off).



In the hierarchy view a plus sign (+) means the list can be expanded into a hierarchy. A minus sign (-) means the hierarchy is fully expanded. Clicking inside the box a second time will toggle between views. Each level or component can have its own

hierarchy which can be expanded or contracted. The **Data Outline View** has these additional features:

1. Edit multiple components and their data fields simultaneously – Note: for multiple data fields to be edited at once, the data field being edited must be empty in ALL of the chosen components. If any of the selected components has an entry already in that field the process will not work.

To edit data fields in multiple components simultaneously, do the following:

- a. Make certain that there is more than one component on the chart.
- b. Choose multiple components by holding down the Left mouse button and dragging diagonally across an area just wider than all of the components.
- c. Examine the **Data Outline View**. Notice that the data fields for all the chosen components turn blue.
- d. With all of the components still selected, place the mouse cursor in one of the on screen components.
- e. Right click the mouse to bring up a pop- up menu of options.
- f. Choose **Properties** from the pop– up menu. This will launch the **Data Properties** interface.
- g. In the **Data Properties** menu, edit the data field of choice and hit **OK** (for more details on editing data fields, see the *Editing component data* section).
- h. Click **OK** again to close the **Data Properties** menu.
- i. Notice that your new entry appears in all of the components. (Note: the edited data field must be set to "visible" for each component or the change will not be noticeable on screen.)
- 2. Create new data fields with their own unique titles New data field titles can be created through a variety of methods. These new headings such as *Name, Company*, or any other topic you choose will be displayed along the horizontal title bar in the **Data Outline View**. For more details on creating new data fields, please see the *Changing component data* section.

(Note: new data field headings will only appear on the **Data Outline View** title bar <u>after</u> they are set to "visible" in the **Box Item** menu. For more

information on hiding and revealing data fields, please see the *Displaying and hiding a component's data on the chart* section.)

- Arrange the title bar in any order Data field headings (such as *Name*, *Company*, etc.) can be arranged in any order along the horizontal title bar in Data Outline View. To change a heading's location, do the following:
 - a. **Click** on the section of the title bar you want to move (i.e. *Name*, etc.).
 - b. Holding down the Left Mouse Button, drag the section horizontally across the title bar to a new location.



Rearranging by dragging across the title bar

A translucent copy of the section being moved will indicate the field's location as it is being moved. The copy will disappear when the mouse is released.

- c. Release the mouse button. The section will appear in the new location.
- 4. **Resize title bars** to resize existing title bars:
 - a. Place the mouse cursor on the divider between one title area and another. It will turn into a two sided arrow (see below):



- b. Holding down the Left Mouse Button, drag the arrow horizontally across the title bar, making the area either larger or smaller. Notice that the size of the data field changes accordingly.
- c. Release the arrow. The title bar and the data field are now the new size.

Moving and resizing toolbars

Moving a toolbar

Many of the toolbars can be moved from their original locations and placed almost anywhere on the screen. To move a toolbar:

- 1. Left click on either: 1) the toolbar's title or 2) the small vertical bar on the toolbar's left side.
- 2. Holding the Left mouse button, drag the toolbar to the desired position and release.

Resizing a toolbar

To change a toolbar's size:

- 1. Place the mouse cursor over either: 1) one of the toolbar's edges or 2) in the corner of the toolbar.
- 2. The mouse will change into a Duplex Arrow.
- 3. Hold down the Left mouse button and drag the toolbar to the desired size.

(Note: only the **Chart Design Palette, Box Item** menu, **Data Outline View** and **Tutorials** window can be resized; the small toolbars on the upper tool deck cannot be changed.)

Hiding and revealing toolbars

Toolbars can be hidden and revealed to un– clutter the workspace. In the View tab Show group, a check mark will be present or absent to indicate that the toolbar is visible or hidden.

Designer	🗸 Report	Show Grid	
Data and Divisions	Orphans	Show Rules	📓 Reset Layout
✓ Profile	✓ Track Changes	✓ Show Status Bar	
	Show		5

Hiding toolbars

To hide a visible toolbar:

- 1. Go to the **View tab**, **Show** group.
- 2. Click on the name of the toolbar you wish to affect.
- 3. The toolbar will disappear.

Revealing toolbars

To display a hidden toolbar:

- 1. Go to the **View tab**, **Show** group.
- 2. Click on the name of the toolbar you wish to affect. (Notice that there is no check mark beside the tool's name.)
- 3. The hidden toolbar will reappear. *NOTE: Hidden toolbars will reappear in their previous locations.*

Revealing and hiding other sections

The Data Outline View, Box Item, Status Bar and Tutorials window are listed on the **View** menu (not the Toolbars menu). To hide and reveal these areas:

- 1. Go to the **View tab**.
- 2. Click on Data Outline View, Box Item, or Status Bar.
- 3. The chosen area will toggle in and out of view accordingly.

Preparing the work area

Measuring tools and guides

For precision work, OrgChart provides the following three measuring tools and guides:

- 1. **Rules** Rules can be added to the top and left of the work area. To perform this operation, go to the **View** tab and select **Show Rules**.
- 2. **Grid** To superimpose a grid over a chart, go to the **View** tab and select **Show Grid**. (*Note: although visible on– screen, the grid never appears in the final version of the chart*.)
- 3. **Snap to Grid** This option forces items to "snap" to the grid lines and not to the spaces in-between. It is very good for precise alignments. To toggle this option, go to the **Home** tab and select **Snap to Grid** in the Tools group.



Snap to Grid

Zooming in and out

Chart magnification can be adjusted in the following two areas:

- 1. Go to the **View tab** and select **Zoom**.
- **2.** The Zoom Toolbar:



By default, the work area view is set to "Fit to Window". To change this setting:

- 1. Click the **Zoom In** button to increase magnification.
- 2. Click the **Zoom Out** button to decrease magnification.

- 3. Open up the **Zoom Toolbar's** drop down menu and choose from the magnification list. Manually enter a new zoom setting in the **Zoom Toolbar**. To do this:
- 4. Click in the **Zoom Toolbar**'s drop down menu.
 - a. Highlight the numbers in the drop down box by either double clicking on the numbers or placing the cursor to the left or right then holding down the Left mouse button and dragging over the numbers.
 - b. Type in a new magnification setting.
- 5. Left click in the drop down box and roll the mouse scroll wheel to increase or decrease magnification.
 - a. **Roll down** to zoom in.
 - b. **Roll up** to zoom out.

TIP: clicking in the Zoom Toolbar drop down box and using the mouse scroll wheel is the most convenient way to zoom in and out.

(Note: to return the chart to its default view, open the Zoom Toolbar's drop down menu and choose "Fit to Window".)

Screen Modes

Modes are screen configurations which have unique layouts and toolsets to streamline the chart making process. OrgChart has the following modes:

- 1. Full Screen
- 2. Chart Normal View
- 3. Master Pages View
- 4. Chart Print Layout View
- 5. Thumbnail View
- 6. Data Outline View
- 7. Divisions View

Full Screen mode

This mode maximizes the work area by hiding distracting toolbars and frame elements.

Activating Full Screen mode

There are two methods to activate **Full Screen** mode:

- 1. Go to the View tab and select Full Screen in the Windows group. (OR)
- 2. Press the **F11** key to toggle **Full Screen** mode on and off.

Returning to Chart Normal mode

There are three ways to return to Chart Normal mode:



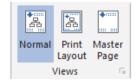
- 1. Go to the View tab and click on Full Screen. (OR)
- 2. Press the F11 key to toggle Full Screen mode on and off. (OR)
- 3. Click the "floating" Return To Chart Normal box in the work area.

Chart Normal view

This is OrgChart's default configuration. This mode displays the maximum number of tools to optimize all stages of chart creation while simultaneously allowing access to numerous data entry and information retrieval fields.

Activating Chart Normal mode

Go to the View tab and click on Normal.



Master Page View

Master Page view is a powerful mode which allows universal changes to be applied to every page of a multi– page chart. This is extremely valuable for creating titles, graphics, logos, information areas and anything else you wish to repeat on every sheet.

In essence, **Master Page** view is a blank canvas which only reflects the universal changes. Therefore, elements which change from page to page – such as individual chart elements and components – are hidden in this mode. They reappear once **Master Page** view has been deactivated.

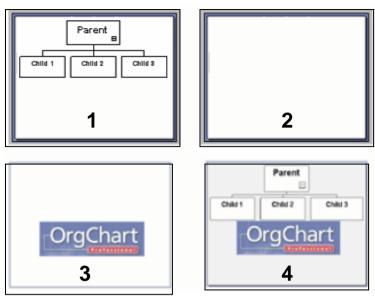
Activating Master Page view

Two ways to activate the Master Page mode:

- 1. Go to the View tab and click Master Page. (OR)
- 2. Right click on an empty area of the chart. When the supplemental menu appears, click on **Master Page**.

Tips for Mastering Master Page View

- The chart seems to disappear in Master Page view don't worry! It is still there, just hidden. It will reappear once Master Page view is deactivated.
- **Components cannot be placed on the Master Page** this occurs because the Master Page will only accept universal (repeating and non– changing) elements, whereas OrgChart interprets components as dynamic. Therefore, it will not allow them to be placed in this mode.
- Elements applied to the Master Page cannot be removed or modified EXCEPT in Master Page view this is done on purpose. By locking these repeating elements in the background, OrgChart allows for the unhampered modification of your chart without having to worry about changing the overall format.



Applying a Graphic Using Master Page

To apply a graphic using **Master Page**, do the following:

- 1. Star with a chart in **Normal View**.
- 2. Go to the **View** tab and click on the **Master Page** button to switch to **Master Page View** (notice that the chart from Step 1 is now hidden).
- 3. Apply a graphic to the Master Page.
- 4. Close the Master Page by choosing another view (Normal, Print, etc.)
- 5. The process is complete. Notice that the chart from Step 1 and the graphic from Step 3 are now both visible.

IMPORTANT TIP: <u>AutoTexts</u> as well as graphics can be applied in Master Page view. Use AutoTexts for chart titles, division names, dates, or any other text you want to appear on every page of your chart.

Bonus Tip: Almost any type of graphic can be applied in Master Page view – including photos. If you want to apply a photo and have it appear <u>through</u> a component of the chart, first apply the picture in Master Page view, then return to Normal view, choose the component you want the picture to appear through and set its Transparency to 100% (Format > Fill Style > Color tab).

Chart Print Layout view

This mode is optimized for chart printing. When in this view: 1) dotted "printer safe" lines will appear in the work area and 2) several grayed out areas of the **Print Toolbar** will become active. From this mode, you can:

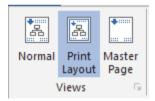
- 1. Add and delete print pages.
- 2. Change page orientation between Portrait and Landscape modes.
- 3. Arrange multiple pages to optimize the printing of oversized charts (charts larger than a single page).

Note: the user must be in Print Layout view for certain print functions to become active.

Activating Print Layout view

There are two ways to activate **Print Layout** view:

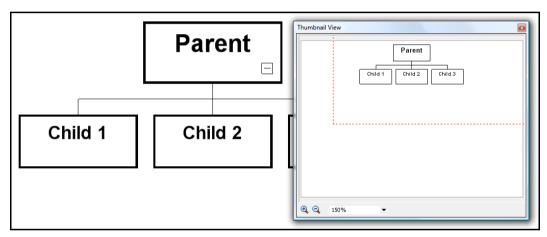
- 1. Go to the View tab and click on the Print Layout icon. (OR)
- 2. Press the **Print Layout View** button on the **View** tab.



Thumbnail View

One of the challenges posed by large charts is being able to conveniently navigate while still seeing enough detail to actually find what you are looking for. OrgChart has solved this problem by creating the **Thumbnail View**.

In essence, the Thumbnail View acts as a reverse magnifying glass – showing a small version of the entire background chart (which would otherwise be hidden because of the high zoom factor). A red selection rectangle in the thumbnail represents the enlarged area of the chart currently visible in the Main Work space (see below).



Thumbnail View in front of zoomed chart in Main Work pane (the red rectangle indicates the magnified area of the chart)

IMPORTANT TIP: the selection rectangle in Thumbnail View is most effective when you are zoomed in close enough to see the details of individual components. If you are zoomed out too far, the thumbnail – and its selection square – is indistinguishable from the zoomed out view of the chart in the main work space.

Thumbnail View has two elements:

- 1. The *Thumbnail pane* this displays a small picture of the entire chart.
- 2. The *Selection rectangle* this rectangle (red in color) appears inside the thumbnail. It represents the area of the larger background chart which is currently in view. There are two ways to move the rectangle:

- a. With the mouse place the mouse cursor inside the selection rectangle, hold down the Left mouse button and drag the rectangle to the desired location. A zoomed view of that area will appear on the chart in the main work space. (OR)
- With the chart scroll <u>bars</u> In the main work area, move the vertical and/ or horizontal scroll bars (by either clicking on the bar and dragging, or using the arrow buttons at the extremes of the bar). Notice that the selection rectangle within the Thumbnail View moves as you scroll.

To launch Thumbnail View – go to View menu and select Show Thumbnail.

To close Thumbnail View – choose from one of the following options: 1) click the red \mathbf{X} in the upper right corner of the **Thumbnail View** pane or 2) go to the *View* menu and reselect **Show Thumbnail** (this will toggle the view off).

Data Outline View

Located at the bottom of the work area, the **Data Outline View** is an area that allows the centralized management of component information in table form. It can also be used to connect components, assign Supervisors, and change Data Field content.

Name	A Title	Ä	Division	ΔÅ	Supervisor	WBS Code 🏘
🤦 Parent	Title>		∑ Chart 1		🖵 <none></none>	Σ 0
🤦 Child 1	Title>		Σ Chart 1		💻 Parent	Σ 0
2 Child 2	Title>		Σ Chart 1		💻 Parent	Σ 0
O Child 3	🖹 <title></th><th></th><th>S Chart 1</th><th></th><th>Parent</th><th>50</th></tr><tr><td>•</td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Data view Dir</td><td>visions View</td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table></title>					

To access the Data Outline View (this view is on by default):

- 1. Go to the **View tab** and click on the **Data Outline View** checkbox to toggle the Data View on and off.
- 2. Choose the **Data View** tab at the bottom of the **Data Outline View** area.

Division View

Division View shares the same window as the **Data Outline View** but is accessed through a different tab. This view allows you to view and navigate complex charts easily. It does this by displaying the entire chart – including all hidden division sub– charts – in an elegant and simple tree structure.

Chart 1 Child 3's Division Child 3's Division 2 Child 3's Division 3	
Data view Divisions View	

To access the **Divisions View**:

- 1. Go to the **View tab** and click on the **Data and Divisions** checkbox to toggle the **Data View** on and off.
- 2. Choose the **Divisions View** tab at the bottom of the **Data Outline View** area.

Security - Protecting Your Chart

OrgChart comes with a password security feature which can be applied to individual charts (see below). After a chart's security is set, a prompt will appear requiring the correct password to be entered before the chart will open.

Project Protection	×			
Set password to restrict access to this project. You will be prompted to enter the password next time you open this project.				
Enter password				
Confirm password				
	OK Cancel Help			

- 1. To access the Document Security screen go to the Main Menu and click on Tools > Protect Project.
- 2. To set the password enter an identical password in both the Enter password and Confirm password fields.
- 3. **To access a protected chart** enter the correct password when the OrgChart security prompt appears (see below):

Project Protection		×
This project is protecte Please enter the pass		ed.
I		
ОК	Cancel	Help

Important: DO NOT lose your password! Password protected documents <u>cannot be</u> <u>accessed</u> once the password is lost.

To complete this screen, choose one of the following options:

- 1. **OK** enters the password.
 - a. If the password is correct the chart will open.
 - b. **If the password is incorrect** an Incorrect Password notification will be displayed. (Remember, passwords are case sensitive so double– check that you are entering your code correctly.)
- 2. Cancel closes the security prompt without opening the locked chart.

Chapter 2: Chart Creation

In this chapter, you will learn how to use OrgChart's many tools to create compelling, informative charts.

Arranging chart elements

All charts are constructed by applying some (or all) of the following seven elements. They can be mixed and matched to create an almost infinite number of unique designs.

- 1. **Themes** visual motifs which affect the appearance of the chart, applied components and certain menu views. [Located on the Design tab]
- 2. **Backgrounds** patterns which appear only on the chart (but don't affect components). [Located on the Design tab]
- 3. **Borders** designs which appear only along the outer edges of the chart. [Located on the Design tab]
- 4. **Shapes** styles that modify a component's shape. IMPORTANT: a shape can only be applied to components that are already present on the chart.
- Components the building blocks of a chart. Components can be moved, linked, hidden and resized. By default, they display an entry's *Name* and *Title* but can show an almost infinite range of information. <u>IMPORTANT</u>: people (components) can only be applied through the graphics interface.
- 6. AutoTexts boxes which contain the titles of *Chart* and *Division* which can be automatically applied to the chart and customized.

(Note: most of these elements can be accessed several different ways; the most convenient is often through the Chart Design Palette.)

Working with Components

Components are the building blocks of a chart. Movable, scalable, linkable and able to contain vast amounts of information, they are the most basic and important element of any project. Components are found in the **Components** area of the **Chart Design Palette.**

IMPORTANT: People (components) can only be applied through the graphics interface. You cannot add people through the Data Outline view.

Chart Design ×		
Components		
Position	Assistant	
Multiple	3 Positions	
A		
Text block	Staff	
Team Frame	Image	
Legend Image	Dynamic Connector	
Shapes		
AutoTexts		

Opening the Components Area

- 1. Make certain the Chart Design Palette is visible (see *Chapter 1: How to hide and reveal toolbars*).
- 2. Place the mouse cursor over the **Components** bar and Left click the button.

Types of Components

OrgChart Professional

There are ten basic components:

- 1. **Single element components** (only one element appears when the component is dragged on the screen):
 - a. **Position** the third largest default sized component. This size is the default scale for most of the other components.
 - b. **Assistant** a unique component designed to be attached and arranged to a Parent. It creates its own space on the main connector and acts independently of any other subordinate components which may be attached.
- 2. **Multiple element components** (several components appear as a group when the component is dragged on the screen):
 - a. **Multiple** launches the **Multiple Shapes** menu. From there, the number of components and their styles are chosen before being placed on the chart.
 - b. **3 Positions** places three standard sized components on the chart. If this is attached as a subordinate, then the three components will be linked when they appear.

3. Unique single components:

- a. **Team Frame** a scalable area with an editable title that can "frame" other components
- b. Staff a component with an invisible border so only its text information appears on screen. To make a staff visible either: 1) go to the Chart Design Palette, grab a Shape and drop it on the staff, or 2) Right click the staff and on the pop– up menu go to Format > Shape Style.
- c. **Text Block** a component designed for text entry.
- d. **Dynamic Connector** a configurable connector used to join other components together.

e. **Image** – a combined image browser and image editor perfect for finding, modifying and placing graphics onto a chart. It is also perfect for positioning logos (and the like) on multiple chart pages simultaneously by placing them on a chart in **Master Page View**.

Adding Components to a Chart

Components can be placed on the chart in the following ways:

- 1. **From the Components area** Hold down the Left mouse button and drag a component on to the chart.
- 2. From the Main Menu Go to the Insert tab and click on Position
- 3. Use the hotkeys Alt+A.

Selecting Components

Once components have been placed on the chart they can be selected individually or in groups.

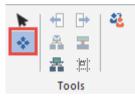
- 1. To select an individual component, you can do any of the following:
 - a. Click on the component with the mouse.
 - b. Hold down the Left mouse button and drag diagonally across an area just wider than the component.
 - c. Go to **Data Outline View** and click on the component's name.
- 2. To select multiple components at once:
 - a. Hold down the Left mouse button and drag diagonally across an area just wider than all of the components.

IMPORTANT: when multiple components are selected, all changes (new shapes, formatting, etc.) will be applied to all of the components.

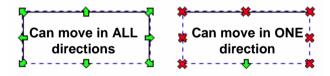
Moving Components

To move a component, do the following:

- 1. Enter Move mode Important: Components can only be moved when Move mode is active. To enter Move mode:
 - a. Go to the **Home** tab and click this button to toggle between the *Move* and *Resize* modes and back again.



- b. Left click the **Move Mode** button on the **Home** tab **Tools** section:
- 2. Select component To select a component do the following:
 - a. Left click on the component with the mouse.
 - b. Hold down the Left mouse button and drag diagonally across an area just wider than the component.
 - c. Go to **Data Outline View** and click on the component's name.
- 3. Green arrows will appear on certain nodes to signify the component is ready to be moved (see below).



Note: green arrows will only appear in the directions the component can be moved. Red "X" marks will appear in all directions that are not available.

- 4. Left mouse click on any of the available arrows (nodes) to grab it.
- 5. Hold down the Left mouse button and drag the component in any of the available directions.

Important: Although many components can be moved at once, only one component_ can be highlighted at a time for movement.

To move several components at once, highlight the highest component in the hierarchy (the uppermost parent) and move it. The rest of the subordinate components will move along with the parent (as a group).

Resizing Components

To resize components, do the following:

- 1. Enter Resize mode Important: Components can only be resized when Resize mode is active. To enter Resize mode:
 - a. Go to the Home tab Tools group and click on the Resize mode option.



- 2. **Select component(s)** Components can be selected individually or in groups. There are three ways to select components:
 - a. Left click on the component with the mouse.
 - b. Hold down the Left mouse button and drag diagonally across an area just wider than the component. This technique also works for selecting multiple components.
 - c. Go to Data Outline View and click on the component's name.
- 3. Blue boxes will appear on each of the component's nodes to signify it is ready to be resized (see below).



- 4. Left mouse click to grab one of the nodes.
- 5. Hold down the Left mouse button and drag in or out to resize the component.

Deleting Components

To delete a component from the chart:

- 1. Highlight the component.
- 2. Press the **Delete** key.

Component Cut, Copy and Paste

Components can be cut, copied and pasted. Each of these performs the following function:

- 1. **Cut**: this deletes the selected component from the screen and places it on the Windows Clipboard (in memory where it can be retrieved later and placed elsewhere).
- 2. **Copy**: the selected component remains on– screen and a copy of it is placed on the Windows Clipboard.
- 3. **Paste**: this puts the (previously cut or copied) component from the Windows Clipboard on to the work area.

Connecting components through Cut, Copy and Paste

Components can be connected by cutting, copying and pasting. These commands can be accessed in as follows:

1. Go to the **Home** tab **Clipboard** group. Cut, copy and paste are all located here.



- 2. Make certain two (unconnected) components are on the chart.
- 3. Cut or copy a component (we will call this Component #1).

- 4. Highlight the second component (we will call this Component #2).
- 5. With Component #2 still highlighted, paste Component #1 from the clipboard.
- 6. When Component #1 appears, it will be connected to Component #2.

Editing Component Data

On screen graphics are just a small part of what components can do. Components can also contain vast amounts of information which can be entered, edited, exported and even printed out.

A component's information is displayed in Data Fields. These Data Fields appear in the following areas:

- 1. The **Position Profile** (Box Item) menu.
- 2. The **Data Outline View** area.
- 3. The **Data Properties** box.

Displaying a component's data in the Data Fields

Click on a component to display its data. (Note: the **Box Item** menu and the **Data Outline View** will remain empty until at least one component is selected.)

Displaying and hiding a component's data on the chart

A component can have dozens of Data Fields – far too many to be displayed on the chart. To solve this, the user can control which fields are visible. By default, the *Name* and *Title* fields are active. To select which fields will be displayed:

- 1. Click on the desired component/box.
- 2. Right-click and select **Properties**. (or you can press Alt-Enter)
- 3. Go to the **Define Layout** tab in the **Box Properties** dialog.
- 4. Drag a field from the left field list to the box preview in order to display it in a chart box.

R	Box Properties	×
Edit Data Define	Layout Shape Style Border and Fill	
122 Person ID Supervisor ID abc Department abc Critical abc SP 1 Name abc SP 1 Status abc IS Assistant Office Location 1 Office Location 2 abc Mobile Phone 122 Flag 1 123 Flag 2 122 Flag 3 Image: Apply To: Oglection	Use mouse click to select the formatting cell. Hold Ctrl key pressed to select several cells	
	QK Cancel Help	

Accessing individual Data Fields

There are four ways to access a component's data fields:

- 1. **Position Profile (Box Item)**: single click in the box next to the field's name.
- 2. **Data Outline View**: double click in the field of choice.
- 3. **On screen Component** (method 1): double click in an empty area in the component. This will launch a new **Box Properties** window. Once the window appears, single click in a field for data entry.
- 4. **On screen Component** (method 2): right click in an empty area of the component. This will launch an additional menu. Go to the bottom of the menu and choose **Properties**. This will launch the **Box Properties** interface. Click on a data field and edit as normal.

Data Fields information types

Information fields may be of the following types:

- 1. **Text** text information can be typed directly (or cut and pasted) into these fields.
- 2. **Link** double clicking this field launches a new interface for link creation.
- 3. **Image** stored images are linked to a component through this field (see *Appendix B*).
- 4. **Attachment** stored information files are linked to a component through this field (see *Appendix B*).
- 5. **Numeric** Numbers with or without decimals.
- 6. **Date/Time** Various date formats
- 7. **Currency** Most international currencies are available.
- 8. Enumeration Develops a dropdown list of specific data choices
- 9. **Query** Enables a search using predefined rules.
- 10. **Calculated** Count and Sum for headcount, span of control, budget summaries, levels and more.
- 11. Name 26 permutations of a name can be accommodated.
- 12. Smart field Sets a graphical or text indicator on a box based upon a rule.
- 13. **Concatenation** Let's you connect two data fields such as first and last names.
- 14. Time Span Calculates the number of days between two dates.

15. Formula – Use any two numeric fields in a computation to generate a third.

Changing components' Data Fields

Data Field customization takes place in the following areas:

- 1. Global changes to ALL the data fields are made on the Default Fields Set menu (for more details, please see the Default Fields Set section).
- 2. Changes to a single component's data fields are made on the Data Properties menu (for more details, please see the Data Properties section).

Connecting components

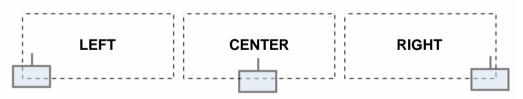
Charts are created by taking independent components and linking them together in a logical order (or hierarchy). There are five ways to link components together:

- 1. Drag and drop one box directly on top of another.
- 2. Use a **Dynamic Connector** to link two elements together.
- 3. Paste a previously cut or copied component on a highlighted element.
- 4. In the **Box Item** menu, click on the **Supervisor** field and choose from the list.
- 5. In the **Data Outline View**, click on the name of a component and drop it over the name of another component in the table.

Connecting by dragging and dropping

Most commonly you will use this method to connect boxes in the OrgChart.

- 1. Select an on screen box component by clicking on it.
- With the original box component still highlighted, go to Chart Design palette > Components.
- 3. Left mouse click on a new component.
- 4. Still holding down_the Left mouse button, drag the new component over the (still highlighted) on– screen component you wish to connect to.
- 5. Small icon boxes will appear indicating when the new component is in the correct position to link either to the left, center or right of the original on-screen component (see below).



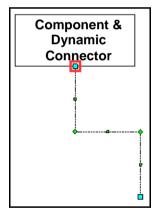
6. When the icon indicates the direction you wish to place the new component, release the left mouse button and drop it on the (still highlighted) on screen component.

7. Notice that the new component appears to "jump off" the original element and that the two are now connected.

Connecting components with a Dynamic Connector

A dynamic connector is unique because it does not show up in the database. It is graphical only. Use the dynamic connector when you want to show a person who reports to more than one supervisor.

- 1. Make certain two (unconnected) components are on the chart.
- 2. Go to **Chart Design** palette in the **Components** area and drag a **Dynamic Connector** onto the chart (between the two components).
- 3. Place the mouse cursor over one of the **Dynamic Connector's** end nodes. The cursor will turn into a pointing finger.
- 4. Hold down the Left mouse button and drag the **Dynamic Connector's** end node to a node on one of the components (a red square will appear to signify that the connector can successfully link to the node; see below):



- 5. Repeat steps 3 5 and attach the free end of the **Dynamic Connector** to a node on the second component.
- 6. The two components are now linked.

Connecting components through Cut, Copy and Paste

Components can be connected by cutting, copying and pasting. To do this:

- 1. Make certain two (unconnected) components are on the chart.
- 2. Cut or copy a component to the Windows Clipboard (we will call this component #1).
- 3. Highlight the second component (we will call this component #2).
- 4. With component #2 still highlighted, paste component #1 from the clipboard.
- 5. When component #1 appears, it will be connected to component #2.

Connecting components through the Box Item menu

- 1. Make certain two (unconnected) components are on the chart.
- 2. Click on a component.
- 3. Go to the **Box Item** menu and scroll down until the **Supervisor** field is visible.
- 4. In the **Supervisor** field, click **None**.
- 5. The **None** field will appear to turn into a box. Click on the small arrow to open up a menu that contains the names of other components on the chart (see below):

E	Box Item ×		
¢	All Columns	•	
	Name	Example	
	Title	[Title]	
	Division	Chart 1	
►	Supervisor	Manager 🗾 👻	
	WBS Code	Manager	
	Photo l	[None]	
	Phone	[Phone]	

- 6. Select the name of a component from the list.
- 7. On the chart, the two components are now linked.

Connecting components through Data Outline View

- 1. Make certain two (unconnected) components are on the chart.
- 2. Go to **Data Outline View**. The names of both components are listed.

- 3. In the **Name** field, click on the first component's name and drag and drop it onto the name of the second component.
- 4. On the chart, the two components are now linked.
- 5. In the **Data Outline View**, the linking of the two components is signified by a line which joins their names. (*In the below illustration, Box 1 is the "Parent" and Box 2 is the "Child"*.)

Name 🛆 🖉	à	Title
- 🤦 Box 1		Parent
L 🕵 Box 2		Child

Collapsing Subordinates in Data Outline View

In **Data Outline View**, the hierarchical tree of linked components can be collapsed or expanded by clicking the box next to the *Parent* component's name (*see above illustration*).

Rule: A plus sign (+) in the box next to a name indicates that the tree is collapsed and a minus sign (-) indicates that the tree is expanded.

Arranging Components Automatically

In addition to manual placement, components can be arranged automatically through the following:

- 1. **Parent components** use the **Arrange Toolbar**.
- 2. **Subordinate (child) components** use the **Arrange Subordinates** commands. These can be accessed in the following ways:
 - a. Go to **Home tab** and select **Arrange Subordinates**.
 - b. Choose the Arrange Subordinates toolbar on the main interface.

Arranging Parent Components

Parent components are arranged using the Home tab Arrange Toolbar (see below).



The Arrange Toolbar commands include:

- 1. AutoArrange shapes this automatically arranges components in a logical order.
- 2. **Reset subordinates' positioning** this returns the subordinates to their optimal location after having been manually repositioned. The subordinate's Parent_must be chosen for this button to become active.
- 3. **Reset positioning** this returns a component back to its previous optimal location after having been repositioned. This drop down button offers five vertical arrangements for subordinate components.
- 4. **Move Sibling Left (up)** moves equal subordinates left (or up) the same level.
- 5. **Move Sibling Right (down)** moves equal subordinates right (or down) the same level.

Arranging Subordinate Components

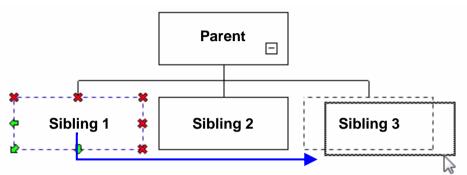
A *subordinate component* (sometimes referred to as a *child*) is an element which is beneath another component in a chart's hierarchy. (The higher component is often known as the *parent*.) Subordinate components can be arranged either manually or through the **Autoarrange Shapes** functions.

Note: all automated arrangement functions require that the parent component be the only selected element. If the parent is not selected, the options will be inactive (or

grayed out). The only exception to this is Move Left/Right, which only becomes active when a sibling is selected.

Arranging a subordinate manually

- 1. Select an on- screen subordinate by Left mouse clicking on it.
- 2. Holding down_the Left mouse button, drag the new component <u>over</u> another sibling. An outline of the sibling being moved will appear (see below).



Sibling 1 being manually dragged & dropped into Sibling 3's position

- 3. A small icon box (with direction arrows or a box pointing up or down) will appear (see above).
- 4. When the icon indicates the direction you wish to place the original sibling, release the left mouse button.
- 5. Notice that the original sibling has taken the position of the one it was dropped on. All the additional siblings shift place accordingly.

Arranging subordinates automatically

The Autoarrange Shapes functions can be accessed in two ways:

1. Go to [Home Tab] Arrange Subordinates.



 Arrange Subordinates

 Image: Subordina

Important: the Parent component must be chosen for the Arrange Subordinates functions to become active. Also, Assistant align right, Assistant align left and Assistant side– by– side only become active when more than one Assistant component is attached to the same Parent.

The following arrangement options are available:

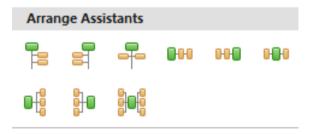
- 1. **Horizontal align center** distributes the subordinates equally on each side; creating a very balanced pattern.
- 2. **Horizontal stagger** creates a stairstep pattern starting with the first subordinate higher, followed a lower component, then followed by another high one. This pattern is repeated with all the subordinates in a chain.
- 3. **Horizontal align right** places all the subordinates in a horizontal line to the lower right of the Parent.
- 4. **Horizontal align left** places all the subordinates in a horizontal line to the lower left of the Parent.
- 5. Horizontal Four Columns (Wide Organization) equally distributes the first four subordinates on a horizontal line beneath the Parent. Any additional subordinates will appear in a new row beneath the first, using the Parent as the center. A new row is formed every time the maximum number of four subordinates is reached. (Note: this button only becomes active after four subordinates are present, before that threshold, the button remains grayed out.)
- 6. Horizontal Six Columns (Wide Organization) equally distributes the first six subordinates on a horizontal line beneath the Parent. Any additional subordinates will appear in a new row beneath the first, using the Parent as the center. A new row is formed every time the maximum number of six subordinates is reached. (Note: this button only becomes active after four subordinates are present, before that, the button remains grayed out.)

2. Click on any of the functions on the Arrange Subordinates toolbar.

- 7. Vertical align right places all the subordinates in a vertical line to the lower right of the Parent.
- 8. Vertical align left places all the subordinates in a vertical line to the lower left of the Parent.
- 9. Vertical side- by- side stacks the subordinates side- by- side beneath each other (very much like stacking crates). It is similar to Align center in that it attempts to create a balanced pattern using the center for alignment.
- 10. Vertical staff right affects only Staff components and places all staff elements on a vertical line facing to the right of the Parent.
- 11. Vertical staff left affects only Staff components and places all staff elements on a vertical line facing to the left of the Parent.
- 12. Vertical Four Columns (Wide Organization) equally distributes the first four subordinates on a horizontal line beneath the Parent. Any additional subordinates will attach vertically to the component above it, moving from left to right, until the maximum number of four components per row is reached. After that number, the process begins again on a new row. (Note: this button only becomes active after four subordinates are present, before that threshold, the button remains grayed out.)

Arrange Assistants Toolbar

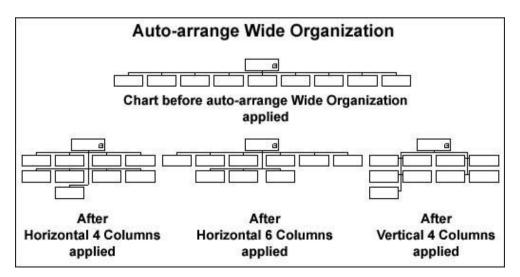
This menu is used to automatically arrange *Assistants* in a variety of professional patterns. (*Note: Assistant buttons only_become active when more than one Assistant component is attached to the same Parent.*)

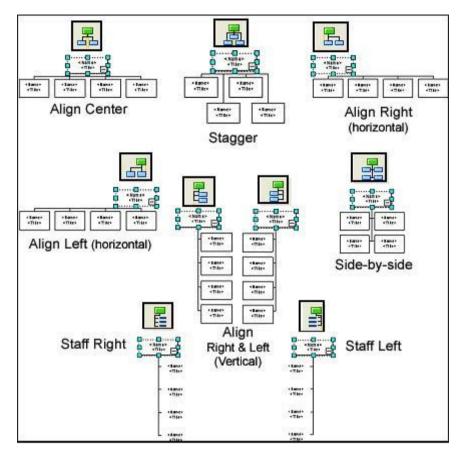


1. Assistant align right – Places all assistant components on a vertical line facing to the right of the Parent.

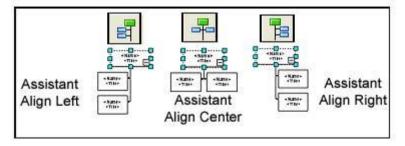
- 2. Assistant align left Places all assistant components on a vertical line facing to the left of the Parent.
- 3. Assistant side- by- side Stacks the assistant components side- by- side beneath each other (very much like stacking crates). It is identical to normal Side- by- side except it only works on Assistant components.
- 4. Align Assistants horizontal right Stacks the assistant components on the same level and side– by– side horizontally to the right of the Parent (very much like the links in a chain).
- 5. Align Assistants horizontal left Stacks the assistant components on the same level and side– by– side horizontally to the left of the Parent.
- 6. Align Assistants horizontal side- by- side Stacks the assistants on the same level and evenly* on either side of the Parent component.
- 7. Align Assistants vertical right Stacks the assistants on top of each other, to the right of the Parent (akin to stacking crates, but only on one side).
- 8. Align Assistants vertical left Stacks all of the assistants on top of each other to the left of the Parent.
- 9. Align Assistants vertical side- by- side Stacks all of the assistants on top of each other evenly* on either side of the Parent.

(*Note: Assistants are only stacked evenly if there are an even amount of components. If an odd number of assistants are present, then one more assistant will appear on one side of the Parent than on the other.)



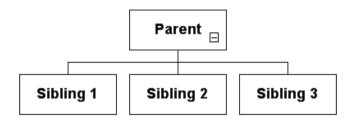


ARRANGE SUBORDINATES CHART



Arranging siblings with the Move Left and Move Right buttons

Siblings are child (or subordinate) components that are on the same hierarchical level (see below):

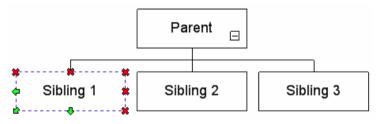


Siblings can be rearranged on the same level by using the **[Home Tab] Move Left** and **Move Right** buttons. *Important: the Move Left/Right function only becomes active when a sibling is selected.*

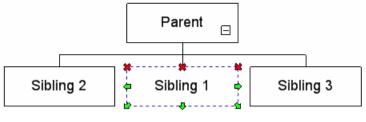


There are two ways to access the Move Left and Move Right functions:

- Go to Chart > Move Sibling > Move Left/Up Move Right/Down.
- Choose either button from the Arrange Toolbar.



BEFORE Left / Right move



AFTER Left / Right move

Controlling graphics with the Image component



The Image component offers an easy way to place graphics on a chart.

Unlike the other components, such as Executive or Team Frame, this item does not attach directly into a chart's hierarchy. Instead, the Image component launches a combined image browser and graphics editor. It is perfect for finding, modifying and placing graphics onto a chart. It is also ideal for positioning logos (and the like) on multiple chart pages simultaneously by placing them on a chart in **Master Page View**.

Activating the Image component

Similar to the other components, the Image component is activated in the following two ways:

- 1. Double click the Image icon in the Components area. (OR)
- 2. Hold down the Left mouse button then drag- and- drop it onto the chart.

Unlike the other components, however, the component will not appear_on the chart. Instead, the Image Component interface will be automatically launched (see below):

Image Component	
OfficeWork	Image correction Brightness 31% Contrast 75% Opacity 100% Tint 0% Tint Color 0% Select Image Maintain Aspect Ratio while resizing
OK	Cancel Apply Help

The Image Component interface is a combined image browser and graphics editor that can perform the following functions:

- 1. Navigate to an image.
- 2. Adjust an image's brightness, contrast, opacity, tint and tint color.
- 3. Adjust or maintain an image's aspect ratio (*Note: these two options are only available after an image has already been placed on the chart and the Image Control interface is opened by double clicking on the image.*)

Using the Image component to place a graphic

- 1. Go to the **Components** area of the **Chart Design Palette**.
- 2. Activate the Image component by either double clicking on it, or dragging and dropping it onto the chart work area.
- 3. The Image Component interface will open.
- 4. Click the **Select Image** button to open up the browser.
- 5. Use the browser to navigate to the desired image's location.
- 6. Once the graphic has been located, highlight it and click the **OK** button.

- 7. The graphic will appear in the Image Component interface's **Preview Pane**.
- 8. If necessary, use the sliders to adjust the image's brightness, contrast, opacity and tint. Press the **Tint Color** button if you wish to access additional options regarding the graphic's tint. (Note: the **Maintain Aspect Ratio While Resizing** and **Restore Original Size** options only become available when adjusting a graphic which is already on the chart.)
- 9. Click the **OK** button.
- 10. The image will appear on the chart.

To adjust the attributes of a graphic that is already on the chart

- 1. Double click on the graphic.
- 2. The **Image Component** interface will open.
- 3. Use the sliders to adjust the image's brightness, contrast, opacity and tint. Press the **Tint Color** button if you wish to access additional options regarding the graphic's tint. If necessary, check or unchecked **Maintain Aspect Ratio While Resizing** and **Restore Original Size** depending on your preferences.
- 4. Click the **OK** button and the changes will be applied to the image on the chart.

Divisions

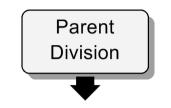
Divisions are groups of subordinate components which can be hidden or expanded in the main chart. Each Division can be also displayed on its own page. Divisions are ideal for organizations that want to represent business units, teams or groups. *Tip: When creating charts with many people, breaking the chart up into divisions is very helpful.*

Creating, expanding and hiding Divisions

To create a Division:

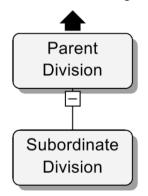
- 1. Choose a component which will be the division head. We will refer to this as the division Parent.
- 2. Make certain a subordinate component is connected to the Parent.

- 3. Select the Parent component and either:
 - a. Select the Grouping tab, Create Division.
 - b. Right mouse click and choose **Create Division** from the pop– up menu.
- 4. A down arrow will appear in the Parent component to indicate that a Division has been successfully created (see below).



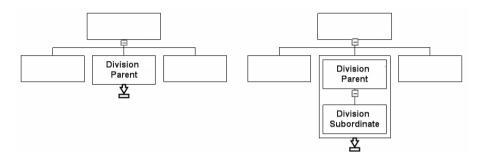
Click down arrow to display Division sub- chart

5. Click the large down arrow to display the Division sub– chart. This chart will appear on its own page. The division's Parent (the same component which appears on the main chart with the down arrow) will appear at the top of the division's sub– chart, but this time with a large up arrow (see below).



Division sub– chart (Click the up arrow to return to main chart)

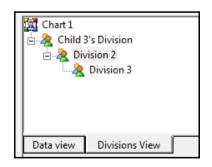
6. To hide and expand a Division sub– chart in the main chart, right click over the box with the arrow and select Division / Expand. When a division is displayed on the main chart, the down arrow (used to switch between the main chart and Division sub– chart) appears at the bottom of the division's bounding box (see below).



Same chart with Division hidden (left) and revealed (right)

Divisions View

Divisions View allows you to view and navigate complex charts easily. It does this by displaying the entire chart – including all hidden division sub– charts – in an elegant and simple tree structure (see below).



To access **Divisions View**:

1. Make certain that **Data Outline View** is active by choosing the **View** tab, **Data Outline View**.

2. Click the **Divisions View** tab at the bottom of the **Data Outline View** window (see above).

Divisions View tree conventions:

- 1. **Main chart** situated at the top of the tree in the upper left corner.
- 2. **Highest tier Divisions** these first divisions run vertically along the left of the diagram.
- 3. All additional (lower) divisions run in a staggered (stair step) pattern from left to right; starting from their Parent (first tier) divisions (see below).
- 4. Navigating in Division View simply click on the division's name and the chart for that division will appear in the Main Work Area.

Tip: The easiest way to move between data fields is to highlight a field and use the keyboard arrow keys. (*This works for both on– screen components and data field menus such as Data Outline View, Box Item and Division View.*)

Shapes

Shapes are styles that modify a component's outline. By default, OrgChart comes with the following shapes (see below):

Chart D	Design ×			
Components				
Shapes				
Rectangle	Rounded Rectangle			
Chevron	Folder Shape			
Square Round	Square Rounded Left			
Round End Right	Round End Left			
Arc Shape Right	Arc Shape Left			
$ $ \bigcirc				
Oval	Double Rect			
5	\Diamond			
Star 5 rays	Star 8 rays			
AutoTexts				

(Note: a shape can only be applied to components already present_on the chart.)

Accessing the Shapes menus

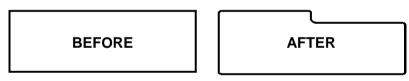
Shapes can be accessed in the following ways:

- 1. Go to the **Chart Design Palette** and click on the **Shapes** bar (pictured above).
- 2. Select a box component, then drag the shape on top of it.
- 3. Right click a component to launch a pop– up menu. On the pop– up menu click **Format > Shape Style**.

Applying shapes to a chart

Shapes may be applied in the following ways:

- 1. Drag and drop a shape icon from the **Shapes** menu directly on to the chart.
- 2. Double click a shape icon in the Shapes menu and it will appear on the chart.
- 3. In the floating menu launched by **Shape > Format > Shape Style**, either: 1) double click a shape icon or 2) select an icon and press **OK**.



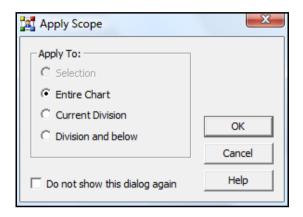
Example of a component with an applied shape

Hiding and revealing shapes

- 1. Right click a component. A pop- up menu will appear.
- On the pop- up menu, go Format > Hide Shape. The shape modification will disappear (although the component will still be visible on screen). A check mark will appear on the menu to indicate that the shape is hidden.
- 3. Repeat steps 1 and 2 to toggle the shape back into view.

Apply Scope

Apply Scope is an intuitive interface which allows you to quickly set the range and locations of the changes in your chart. Now, with a single mouse click you can affect everything from the data in individual components to the look of the entire chart (and everything in between).



There are slightly different variations of the **Apply Scope** interface in different parts of OrgChart, but all have versions of the same following options:

- 1. **Selection** affects only the currently selected components (this option is available in Paint Format's scope but not in Themes, Backgrounds or Borders).
- 2. Entire Chart affects the entire chart.
- 3. **Current Division** affects only the currently selected division.
- 4. **Division and below** affects the currently selected division and every division beneath it.

To use Apply Scope:

- 1. In the **Chart Design** tab click on a Theme, Background or Border. The **Apply Scope** interface will appear. (Drag and drop activation is only available in certain versions.)
- 2. Click the appropriate radio button to choose the scope, then click **OK**.
- 3. The changes will be applied.

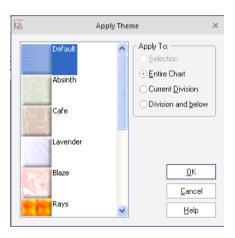
Themes

Themes are visual motifs which affect the appearance of the chart, most of the chart's components and certain menu views.

Accessing Themes

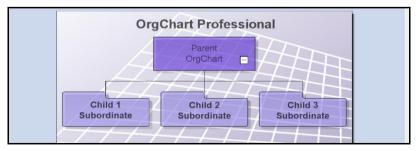
To access **Themes**, do one of the following:

- 1. Go to the **Design** tab and click on the **Themes** button.
- 2. Right click in an empty space in the chart to bring up the contextual menu and choose **Themes**. A menu similar to that shown below will appear.



Applying Themes to a chart

Choose a theme from the **Themes** drop down menu.



Example of an applied Theme

Backgrounds

Backgrounds are patterns which appear only on the chart but don't affect components. OrgChart comes with the following default backgrounds (see below):

\$	Chart Ba	ckgro	ound	×
	None	•	Apply To: Selection Entire Chart Current <u>D</u> ivision	
Г	Linear Border 1		O Division and <u>b</u> elow	
	Thick/Thin Stripes			
$\overline{\mathcal{N}}$	Arc Pattern Large		<u>0</u> K	
4			Cancel	
	Triangle Corners 1	~	<u>H</u> elp	

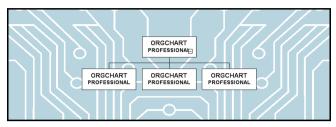
Accessing Backgrounds

To access Backgrounds, do one of the following:

- 1. Go to the **Design** tab and click on the **Backgrounds** button (pictured above).
- 2. Right click in an empty area of the chart and choose **Background Style** from the pop– up menu.

Applying backgrounds to a chart

Go to the **Design** tab and click on **Background** and then **Style.** Select a style and scope and click **OK**.



Example of a chart with an applied background

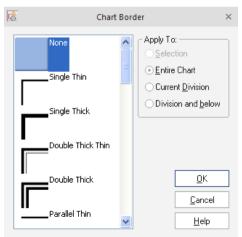
Hiding and re-displaying a background

The background on a chart can be toggled from visible to hidden by:

- 1. Going to the **Chart** tab select **Background** and then **Hide**.
- 2. Right clicking an empty space on the chart to bring up a pop– up menu and choosing **Hide Background**.

Borders

Borders are designs which appear only along the outer edges of a chart. They can be resized and placed on charts which already have themes and backgrounds. By default, OrgChart comes with the following borders (see below):



Accessing Borders

Go to the **Design** tab and click on the **Borders** button.

Applying borders to a chart

To apply a border, do one of the following:

- 1. Double click a border icon in the **Borders** menu. It will appear on the chart. (OR)
- 2. Go to the **Design** tab and select **Border**, and then either: 1) double click a border icon or 2) select an icon and press **OK**.

			7
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Example of a chart with an applied border

Replacing border styles

To change from an already applied border style to a new one:

- 1. Go to the **Design** tab, select **Border**, then **Style**, then **None**.
- 2. To apply a new border, repeat the above process.

AutoTexts

AutoTexts are fields containing both automatically generated and user defined information which can be applied to a chart.

- 1. User defined **AutoTexts** require manual input of information, such as a Chart's title, or the name of a division. User defined **AutoTexts** are: 1) Chart Title, 2) Division Title and 3) Division Number.
- 2. Automatically generated **AutoTexts** supply information directly from your computer's operating system. These AutoTexts include: 1) Creator Name, 2) Organization, 3) Current Time and 4) Current Date.

NOTE: All of these fields can be edited manually by: 1) highlighting the current entry and then 2) typing in the new information

Accessing AutoTexts

- 1. Go to the left **Chart Design** pane and click on the **AutoTexts** bar.
- 2. Go to the **Insert** tab and select **AutoText**.



Applying AutoTexts to a chart

AutoTexts can be applied in the following ways:

- 1. Drag and drop an icon from the AutoTexts menu directly on to the chart.
- 2. Double click an icon in the AutoTexts menu and it will appear on the chart.
- 3. Go to the **Insert** tab and select **AutoTexts**. This will open up the **Add AutoText Element** menu. From here, either: 1) double click an icon or 2) select an icon and press **OK**.

Modifying AutoText text

Important: Information inside an AutoText can only be changed from the Divisions View. To change an AutoText, do the following:

- 1. Place an AutoText on the Chart.
- 2. Open up **Divisions View**.
- 3. In **Division View**, highlight the name of the level the AutoText is on. The level will have a default name such as *Chart*, *Division 1*, *Division 2*, etc.
- 4. Press the **F2** key (or right–click) to make the default Division name editable.
- 5. Input the text you wish to appear in the AutoText.
- 6. Hit **ENTER** to apply the change.

Changing the Order of Data Fields

To change the order of a component's data fields:

- 1. Select the component. Its data fields will appear in the **Box Item** menu.
- 2. Go to the **Properties** dialog and select the field you wish to move.
- 3. Click the **Move** arrows at the top of the **Box Item** menu to move the selected data field higher or lower on the list (see below).

Name Visible Name Division Division Supervisor Vestore Photo Photo Photo Photo Paral Photo Division Division Division Photo Photo Paral Photo Division Divi	Use mouse click to select the formatting cell. Hold Ctrl key pressed to select several cells
--	---

Customizing the Appearance of Box Components and Connectors

Components and connectors can be customized to meet all your chart making needs. By default, components appear as rectangles which display the *Name* and *Title* fields in 10 pt Tahoma font. Connectors appear as plain black lines. These can be changed to much more interesting designs through the **Home** tab **Connector Style** icon.



Modifying the Fill Style, Border and Shape of a Box Component

The Shape modification menus can be accessed in two ways:

- 1. Go to **the Home tab** and select from the box icons for **Fill Style, Border** and **Shape.** For this method an on screen component must be selected or the shape modification menus will be inactive (grayed out). (OR)
- 2. Right click an on screen component to launch a pop– up menu. When the menu appears, go to **Format** and choose from the expanded list of menus.

The following is a detailed look at the various shape modification menus and how to use them to customize your components and connectors:

Fill Style menu

This menu is divided into the following four areas (pictured below):

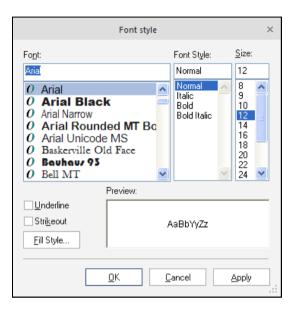
5			Fill	Style	×
	Color	Gradient	Pattern	Picture Color:	Apply To: Selection Entire Chart Current Division Division and Delow
		Other			K Cancel

Click on a tab to display any of the **Fill Style** menus:

- 1. **Color** choose a standard fill color or create a custom one.
- 2. Gradient choose a gradient (gradual transition) from one color to another.
- 3. **Pattern** choose from a menu of pre– loaded patterns.
- 4. **Picture** choose a picture then apply a tint color (to change its shade).

Font Style menu

This custom interface allows you to assign Font Family, Font Size, Font Weight, Effects, Script and Fill Style (see below).



Note: text alignment cannot be done through this menu. To align text within a component, go to the Home tab and choose the **Align Left**, **Align Center** or **Align Right** buttons (a component's text is centered by default).



Border Style menu

This menu controls the appearance of the line which defines a component's shape. You can control the following: Line Style, Line Width, Fill Style, Join Style and Transparency.

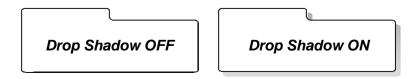
Connector Style menu

This controls the appearance of a component's connector and of Dynamic Connectors. From here you can control: Line Style, Line Width, Join Style, Fill Style, and how a connector starts and ends (i.e. with an arrow, plain, etc.). See below:

Important: you cannot directly select the connector between two components (if you wish to edit it). Instead, you must choose one of the components and then bring up the Connector Style menu.

Drop Shadow

This option creates a shadow effect; thereby giving the component a three dimensional appearance. Clicking this entry toggles the shadow on and off (a check mark will appear next to the entry accordingly).

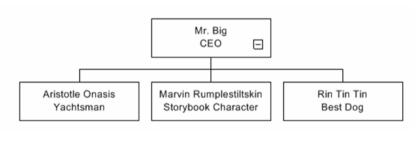


Using Auto Adjust Size & Word Wrap on Components

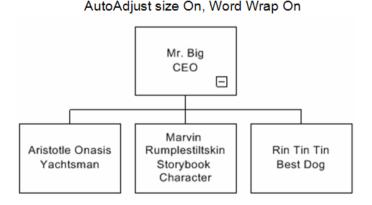
Components can hold and display an almost encyclopedic amount of text. To keep this information orderly and within each component's confines, OrgChart has Word Wrap and Auto Adjust Size.

- 1. **Word Wrap** keeps the length of the text within the width of a component. It makes the component longer to accommodate excessive text.
- 2. Auto Adjust Size extends the width of the component to accommodate the length of the text. This feature also adjusts all visible boxes in a chart to the same size. This feature is automatically turned off for any box whose size is manually adjusted.

Note: Both of these functions are on by default:



AutoAdjust Size On, Word Wrap Off



To toggle Text Wrap and Auto Adjust Size on and off:

1. Go to the Home tab and choose either Word Wrap or Auto Adjust Size.



2. Right mouse click a component to launch a pop– up menu. When the menu appears, go to **View** and choose either **Word Wrap** or **Auto Adjust Size**.

Paint Format: the Ultimate Component Modifier

One of OrgChart's most powerful modifiers is **Paint Format**. This amazing tool allows you to take the visual attributes of one component - such as its shape, color and font - and transfer those same attributes directly to other components in your chart.

The changes can be as sweeping or as precise as you need – from individual components, to divisions or even to the entire chart. **Paint Format** even has the ability to focus on specific professions or titles. So, for example, you could create a unique format for each profession, then apply those unique changes across the entire project (such as automatically applying a gold chevron to all supervisors and a green folder to all accountants).

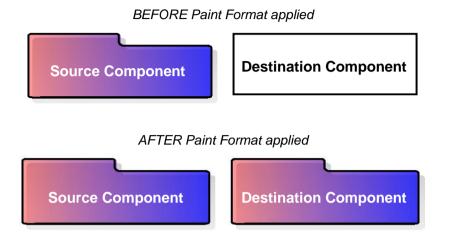
Tip: Think of Paint Format as a clone tool that only affects a component's appearance, yet leaves all the component's unique information intact and unchanged.

Paint Format has two modes:

- 1. Special mode or Format Painter Wizard.
- 2. Selection mode (this is on by default).



To toggle between these two modes, click the small arrow to the right of the button (see below):



Note: The Paint Format button will only become active when a single component is currently selected; otherwise it will appear grayed out.

Selection mode

Choose this mode when you wish to manually copy format changes. To use Selection mode, do the following:

- 1. Select the source component which contains the format you wish to copy.
- 2. Click the Paint Format button. Notice that the button stays depressed.
- 3. Highlight the destination component(s) you wish to apply the changes to. (For single components, simply click on the component. For multiple components, hold down the Left mouse button and drag a rectangle around the group; the components will appear highlighted when the button is released.)
- 4. The destination component(s) will now have the same visual format as the source component.

Special mode (Format Painter Wizard)

Select this option when you wish to apply format changes automatically. Special mode works by launching the **Paste Format** interface (see below):

1 Contraction of the second se		Paste Format		×
Apply Scope:	Find what:	eting this the condition	All Format Options Primary Box Options ✓ Fill Style	>
 Entire Chart Current Division 	Find <u>w</u> here: Co <u>m</u> parison:	Any Field	Border Style Connector Style Shape Style	=
O Division and <u>b</u> elow Apply for levels:	Apply if me	e	- Size	
All levels	Rule	Do not use rule when applying sty	Manual Data Fields' Options	
	<u> </u>	Options < Cancel Help	Layout Image field size	>

This interface is divided into two basic areas: 1) Scope and 2) Conditions.

- 1. **Scope** this area determines the range and locations in the chart that your changes are going to affect. The available ranges are:
 - a. Selection
 - b. Entire Chart
 - c. Current Division
 - d. Division and below
- 2. **Conditions** this area is used to choose which component(s) are going to be affected based on certain parameters. In essence, from here you choose the component(s) that you want to change based on something in their data such as a name or title.

This is a powerful tool because it allows you to group components based on a relationship between their data. This means that you can either locate, or assign factors for certain components and then control how every one of them appears no matter where they are located in the hierarchy.

This makes Paint Format amazingly efficient at applying sweeping changes that make entire groups, positions and professions immediately recognizable based on their format (such as having all managers appear as blue ovals).

The Conditions area contains the following sections:

- 1. **Apply if meets condition** this box must be checked to activate the rest of the *Conditions* area.
- 2. **Find what** tells **Paint Format** what to look for. Any data or text may be entered into this area. Click the arrow on the right to activate a drop down menu which holds a record of the criteria previously entered into this field.
- 3. **Find where** determines which data fields **Paint Format** is to search when matching the text or data entered into the *Find what* field. The default is *Any Field*. If you need to specify one data field in particular, click the drop down menu and a list of all the available data fields will appear.
- 4. **Comparison** click the arrow to open up a menu of additional search parameters (such as *Contains* (default), *Equal to*, etc.).
- Match case checking this box sets Paint Format to recognize capital letters, upper and lower case, etc. (Tip: leave this box unchecked most of the time. When it is active, components may not be found or affected because of simple errors, such as someone forgetting to capitalize a name or title, etc.).
- 6. **Options** click this button to open up a menu of additional options.

Using Special mode

To use Special mode, do the following:

- 1. Select the source component which contains the format you wish to copy.
- 2. Click the **Paint Format** button if necessary, click the arrow next to the button and select **Special** from the drop down menu.
- 3. The **Paint Format** interface will appear.
- 4. To activate the *Conditions* area, check the *Apply if meet conditions* box. The *Conditions* section will now become active.
- 5. Type your criteria (position, title, etc.) into the *Find what* field.
- 6. Go to the *Find where* area and choose from the list of available data fields.

- 7. If necessary, go to the *Comparison* section, click the arrow to open the drop down menu and choose from the available additional search parameters (the default is *Contains*).
- 8. Check the *Match case* box if you want **Paint Format** to recognize capital letters, upper and lower case, etc.
- 9. If necessary, specify any additional options with the Options button.
- 10. Go to the *Scope* section and click the appropriate radio button to choose the range and locations in the chart that your changes are going to affect.
- 11. Click OK.
- 12. When the interface closes, notice that your changes have been applied.

Box Properties interface

On– screen graphics are just a small part of what components can do. Components can also contain vast amounts of information which can be entered, edited, exported and even printed out. An important area for the manipulation of this information is the **Box Properties** interface. (*This area has two tabs. The image below shows the Box Properties menu with the Edit Data tab selected*).

с¢	Box Properties ×
Edit Data Define Layout Name Visible © Employee_Name 122 Employee_Name abc Department 122 Decision_Maker 123 Decision_Maker 124 Decision_Maker 125 Supervisor 126 Supervisor 127 Supervisor 128 Supervisor 129 Supervisor 120 Salary abc Location Image: Photo Image: Photo Image: Photo Image:	Use mouse click to select the formatting cell. Hold Ctf key pressed to select several cells Image: Content of the several cells Image: Cell alignment Image: Cell alignment
	<u>D</u> K <u>C</u> ancel <u>H</u> elp

6	Box Properties	×	Box Properties ×
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Displaying the Box Properties interface

Once a component is selected, the Box Properties interface can be accessed in the following ways:

- 1. Go to the **Home** tab and select **Properties**.
- 2. Double click an empty area inside a box component (an area with no text or graphics, etc.).
- 3. Right click a component to launch a pop– up menu. In the pop– up menu choose **Properties**.
- 4. Use the hotkey combination of **Alt+Enter**.

Box Properties: Scope

Scope is a powerful and intuitive interface which allows you to quickly set the range and locations of the data changes in your chart. It is found in the Apply To section at the bottom of both **Box Properties** tabs. It has the following options:

Apply To: O Selection C Entire Chart C Current Division

- 1. Selection only applies changes to the currently selected component(s).
- 2. Entire Chart applies changes to every component in the chart.

3. Active Division – only applies the changes to the division of the currently selected component.

Special Tip: Scope is one of OrgChart's most useful features because it can be applied to any data field in any combination anywhere on the chart. This means that you can set certain fields, like the company's name or telephone number, to appear in every component in the division or chart, but leave all the other data fields unaffected. Since you can have any data (or field) appear anywhere, the possibilities and time saving features of scope are almost limitless.

Box Properties: Edit Data

This area is used to define what data will be associated with certain component(s). To use this section:

- 1. Click in the right hand column of the data field you want to edit. The area will turn blue.
- 2. Enter the data.
- 3. Press **ENTER** or click in another field to apply the data.
- 4. Set the scope of the changes by going to the **Apply To** area and clicking one of the available choices.
- 5. Click the **OK** button to apply the changes and close the menu.

Box Properties: Define Layout

This area determines the visual appearance the data in the component. It determines what is visible and where (see below):

OrgChart Professional

6	Box Properties	×
Edit Data Define La 123 Position ID abs Department	ayout Shape Style Border and Fill Use mouse click to select the formatting cell. Hold Ctrl key pressed to select several cells	1
123 Decision_Maker Date_of_Hire abc_src_IsAssistant Supervisor 123 Supervisor 123 Supervisor PID 123 Level \$ Salary \$ Proposed Salary \$ Market	Cell alignment Display options Cell positioning	
abc Salary Grade abc Dotted_line_1 123 DL-ID-1 abc Dotted_line_2 123 DL-ID-2 abc Diversity 123 Years_in_Job	■ ■ Eont Style N: Show fiel N: Show fiel Word wrap Hide empty Hide empty Multiline Bottom line Columns in box: Set this layout as a default for the new boxes.	
Apply To: • Selection Entire Cha	art OCurrent <u>D</u> ivision	_
	QK <u>Cancel</u> <u>H</u> elp	

This tab consists of the following areas:

- 1. **The Data Field area** displays what data fields are available (this changes depending on what field data view you have chosen). It contains the following:
 - a. Drag the fields you want in the chart box to the layout window.
- 2. The Preview Pane displays a simple diagram of the component. It shows:
 - a. *Data fields that will be visible* to change this, drag and drop foelds from the Data Fields area.
 - b. Order of the data fields to change the order, highlight the desired field in the Data Fields area, then click the Move Up or Move Down buttons. Note: The Move Up and Move Down buttons will only become active if a data field with a check in the visibility box is selected. These buttons will also either activate or deactivate depending which data field is selected.
 - c. *Components text font* this is selected in the *Display Properties* area (see below).

- d. *Components text alignment this* is selected in the *Display Properties* area (see below).
- 3. **The Display Properties area** determines certain visual properties of the component. It contains the following:
 - a. *Display Column Name* check this box to make the title of the data field appear in the component (for example, with the box checked a person named "Mr. Sample" would appear in the component as "Title: Mr. Sample".)
 - b. *Text alignment buttons* click any of the three buttons to determine if the text will be aligned on the left, center or right of the component.
 - c. *Font Style* click this button to open the font menu (for more details, please see the *Font Style* section of this manual).
- 4. **The Apply To area** determines the scope of the changes which have been determined in the other areas (for more details, please see the *Box Properties: Scope* and *Apply Scope* sections of this manual).

Once you have made your selections from the above sections, click the **OK** button to apply the changes and close the menu.

Arranging Data Fields by using the Move Up and Move Down buttons

To change the order of Data Fields (by moving them higher or lower on the list), choose the desired field in the *Layout tab* of the *Box Item* menu, then click the **Move Up** or **Move Down** button.

8		Box Properties	×
Edit Data 123 Position ID abc Department 123 Decision_Maker Boate_of_Hire abc_src_lsAssistant E Supervisor 123 Supervisor_PID 123 Level	Define Layout	Shape Style Border and Fill Use mouse click to select the formatting cell. Hold Ctrl key pressed to select several cells	
\$ Salary \$ Proposed Salary \$ Market abc Salary Grade abc Dotted_line_1 123 DL-ID-1 abc Dotted_line_2 123 DL-ID-2 abc Diversity 123 Years in Job		Cell alignment Eont Style N: Show fiel Word wrap Hide empty Bottom line Bottom line Bottom line Bottom line Bottom line	
Apply To:) <u>E</u> ntire Chart	Current Division	
		QK <u>C</u> ancel <u>H</u> elp	

Data Fields information types

- 1. **Text** text information can be typed directly (or cut and pasted) into these fields. Single click to open.
- 2. **Salary** used for dynamic, on-the-fly calculations of budgets and expenditures. It is used in conjunction with the *Headcount* and *Team Budget* fields.

To use this function, single click the *Salary* data field and type in numbers (*note: this field accepts numbers only*). When finished, hit the **ENTER** key. The input will be applied and a dollar sign (\$) will automatically be placed in the field.

3. **Link** – this is where links are created (see *Appendix B*). Double click in the field to open the **Link Data** menu (see below):

📕 Link Data		×
Link To		
file:/// 💌 C:	\OrgChart\OrgChart Information.t	Browse
Display As 🛛 🛛	rgChart Information.txt	Clear data
OrgChart Inform	nation.txt	
	OK Cancel	Help

4. **Image** – this field links stored images to a component (see *Appendix B*). Double click the field to open the **Image Data** menu (see below):



5. Attachment – stored information files are linked to a component through this field (see *Appendix B*). Double click the field to open the **File** Attachment Data menu (see below):

ଜ	File Attachment Data	×
<u>D</u> isplay name	Job Description.doc	<u>S</u> ave As
Initial file path	C:\Documents and Settings\Joe\Desktop\Org	Browse
	⊻iew	Clear data
	<u>Q</u> K <u>C</u> ancel	Help

6. **Calculated field** – enables the automatic tallying of personnel, salaries and team budgets. The scope can be set to branches, managers and subordinates (see below):

r <mark>ð</mark>	Calculated	l Field		>	<
Operation Sum	fected Column otal people	Ţ	Affected Branch a]
		<u>0</u> K	<u>C</u> ancel	<u>H</u> elp	

This menu is accessed by double clicking in the following two data fields.

- a. **Headcount** default configuration for calculating number of personnel.
- b. **Team Budget** default configuration for calculating budget.

To view totals for a group of components, click on the parent component to display the tallies for the parent and all its subordinates.

For more information and step- by step details on other options available in the *Calculated Field* menu, see *Appendix B: Calculated Field* – *Headcount and Team Budget*.

Dynamic calculations with Headcount, Salary and Team Budget

Headcount, Salary and *Team Budget* all work together to make certain calculations possible. This occurs because the *Team Budget* is determined from information gathered from both the *Headcount* and *Salary* fields.

For step– by– step instructions on performing Headcounts and Team Budgets, see *Appendix B: Calculated Fields – Headcount and Team Budget*.

Chart Data Set: mastering global data fields

In addition to the default *Data Fields* present in the *Box Properties* menu, new fields can be created, modified or deleted globally through the **Chart Data Set** interface (see below):

Name	Туре	Visible	Display name	Formula	Format	New
Name	👗 Name	\checkmark			0 .00	
Title	abc Text	\checkmark				<u>A</u> dd Predefined
Division	∑ Calculated			Σ		Delete
Supervisor	🔁 Supervisor			Σ		Delete
WBS Code	∑ Calculated			Σ		<u>S</u> et Title
Photo	🔱 Image					
Phone	abe Text					
eMail	🥏 Link					
Headcount	\sum Calculated			Σ		Move <u>U</u> p
Span of Control	\sum Calculated			Σ		Maus Dawn
Total Salaries	∑ Calculated			Σ		Move Do <u>w</u> n
Salary	\$ Currency				0 .00	
Load	123 Numeric				0	
Loadcount	\sum Calculated			Σ		0K
Note	abc Text					
Area of Responsibility	abo Text					<u>C</u> ancel

IMPORTANT: The **Chart Data Set** stores and creates data fields that can become available to every component (globally). However, although these fields are available, they are not automatically included or visible in the final component. Only after you set the data field to be accessible and visible will it then be available for the chart building process.

Accessing the Chart Data Set interface – Go to the Data tab, Chart Data Set.

Editing an existing data field:

There are five fields which can be edited in the **Chart Data Set**:

- 1. Name to edit this field, do the following:
 - a. Click on the *Name* column of the chosen data field. The area will turn blue, signifying that it is now editable.
 - b. Enter the new information.

- c. Press **ENTER**, or click in another data field and the information will be applied.
- Type there are nine different types of data fields: 1) text, 2) numerical, 3) currency, 4) calculated, 5) link, 6) image, 7) attachment, 8) FormTool document and 9) supervisor. To edit this field, do the following:
 - a. Click on the *Type* column of the chosen data field. The field will turn blue and a small button will appear on the right side.
 - b. Click the button to open a drop down menu displaying the nine types of fields listed above.
 - c. Click on your choice in the drop down menu.
 - d. The selection will now appear in the *Type* field.
- 3. **Visible** determines whether the data field will be visible. Check this box to toggle between visible and hidden.
- 4. Display Name determines whether the title of the data field (such as Name, Title, Photo, etc.) will appear in the component. (For example, in a component with a person named "Mr. Sample", the name would appear as "Title: Mr. Sample" if Display Name was checked.) Check this box to toggle the data field title between visible and hidden.
- 5. **Formula** formulas are only available if certain types of data field were selected in the *Type* column (i.e. numeric, currency, calculated, etc.). To edit this field:
 - a. Click on the *Formula* column of the chosen data field. The field will turn blue and a small button will appear on the right side.
 - b. Click the button to open a drop down menu displaying the **Calculated Field** menu (see below):

6		Calculated Fie	eld			×
Operation Sum	Ŧ	<u>A</u> ffected Column Total people	Ŧ	Affected Branch a		
				[Use condition	
		1 <u>0</u>	ĸ	<u>C</u> ancel	Help	

- c. Choose options from the drop down menus in the *Operation*, *Affected Column* and *Affected Scope* areas and click **OK**.
- d. The **Calculated Field** menu will close and your selection will now appear in the *Formula* area of the *Chart Data Set*.

To create a new data field:

- 1. Click the **New** button. The *Name* column will turn blue and a new entry entitled "*Unnamed*" will appear.
- 2. Type in a name for your new data field, then either hit **ENTER** or click in another field to apply the change.
- 3. Choose your options, from the *Type*, *Visible*, *Display Name* and *Formula* areas.
- 4. When you are done editing the data sets, click **OK** to close the interface.
- 5. The Add Columns in Data Views menu will open. This interface provides the option to add your newly created data field to already existing Defined Data Views (see below):

Add Columns in Data Views		X
New Data Columns:	Defined Data Views:	
Unnamed	Default Salary Planning Phone Directory	
	DK Cancel	Help

To add your new field to an existing Defined Data View:

- 1. Check the box next to the views you want your new field to appear in.
- 2. Click OK.
- 3. The interface will close and you will be returned to the main work area.
- (From this point on, whenever any of the views you checked is chosen in the Box Item: Current Box Layout or Outline View: Data View Quick Selector menus, your new data field will appear along with the other data fields.)

To load a predefined data field:

OrgChart comes with a library of predefined (previously designed) data fields. To load from this library:

- 1. Click the Add Predefined button.
- 2. The Add Predefined Columns menu will appear (see below):

ß	Add Predefined	Columns ×
	Name Title Supervisor Company Organization Division Title WBS Code Headcount Span of Control Median Span of Control Average Span of Control Levels above Levels below	 ∑ Current level \$ Salary 123 Load 2 E-Mail Office Photo File Resume Business Form abc Location abc Address abc City abc State abc Zip abc Country
<		>
	Add	I <u>C</u> lose

- 3. Highlight the data field you wish to add and click the **Add** button.
- 4. The Add Predefined Columns interface will disappear and your selected, predefined data field will appear in the *Chart Data Set* area.

Additional Chart Data Set buttons:

- 1. **Delete** removes a data field from the *Chart Data Set* area. To use, simply highlight the field you wish to remove and press **Delete**.
- 2. **Set Title** sets the currently chosen data field as a title. If the currently highlighted field has already been set through this option, the button will automatically switch to *Remove Title*.
- 3. **Move Up** moves an item higher on the list. This option is inactive if the selection is already at the top.
- 4. **Move Down** moves an item lower on the list. This option is inactive if the selection is already at the bottom.

To complete the Chart Data Set process, choose from the following:

- 1. **OK** accepts your choices and applies them universally to the data fields of every component.
- 2. **Cancel** closes the panel without making any changes.
- 3. **Help** launches the Help menu.

Viewing & Controlling Data Views in Outline View

The *Outline View Control Bar* is one of the main interfaces used to work with data views. Sitting atop the *Outline View*, it provides a convenient, central location to access all the tools necessary to view, create and manipulate these powerful resources.

Although this control bar has many options, this section will only focus on those directly related to data views.



 Edit Current Data View – launches the Edit Data View menu. By modifying the currently selected data view, this interface determines what data fields and data views will be available in the Box Item: Current Box Layout and Outline View: Data View Quick Selector drop down menus. It also determines the order in which these fields are displayed (see below):

Data View Name:		
Available Data Columns: Supervisor WBS Code Photo Phone Office E-Mail Office Headcount Team Budget Salary Load Loadcount	Add -> Add all Add all <-Remove	Selected Data Columns:
Note	-	Move Up Move Down
	OK	Cancel Help

2. Creating a new data view in Edit Data View:

- a. Type a new name in the Data View Name field.
- b. Use the *Add* and *Remove* buttons to shift data fields between the *Available Data Columns* and *Selected Data Columns* areas. Items may also be dragged and dropped across panes.
- c. Once all the desired data fields are present in the **Selected Data Columns** pane, use the *Move Up* and *Move Down* buttons to determine how those fields will appear in your final data view. Items may also be dragged and dropped into the desired order.
- d. Click **OK** to close the interface and apply the results.
- e. Back in the main work area, notice that the name of your new data view appears in the **Outline View: Data View Quick Selector**.
- 3. Editing an existing data view in Edit Data View follow the above instructions but do not type a new name in the *Data View Name* field.
- Define Data Views launches the Define Data Views menu. This interface is used to add new data views which will then become available in the Box Item: Current Box Layout and Outline View: Data View Quick Selector drop down menus. It can also be used to edit currently existing data views.

1 Colored	Define Data Views	×
All Columns Default		<u>A</u> dd
Salary Planning Phone Directory		<u>E</u> dit
		Delete
		Move Up
		Move <u>D</u> own
		Move
		<u>0</u> K
		<u>C</u> ancel
		Help

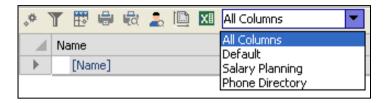
5. Adding a data view using the Define Data Views menu:

- a. Click the **Add** button.
- b. The Edit Data View menu will appear.
- c. In the **Edit Data View** menu, type a new name into the *Data View Name* field and choose which items you wish to populate your view (for more information on using the **Edit Data View** menu please see the *Edit Current Data View* section).
- d. Click **OK** to close the menu and return to the **Define Data Views** menu.
- e. Arrange your data views by using the *Move Up* and *Move Down* buttons.
- f. When you are satisfied with the entries and their arrangement, click **OK** to close the interface.
- g. To see the results of your change, open the *Outline View: Data Quick View Selector*. Notice that your changes have been applied and are available for immediate use.

6. Editing a data view using the Define Data View menu:

- a. Click the **Edit** button.
- b. The Edit Data View menu will appear.
- c. In the **Edit Data View** menu, choose which items you wish to populate your view (for more information on using the **Edit Data View** menu please see the *Edit Current Data View* section).
- d. Click **OK** to close the menu and return to the **Define Data Views** menu.
- e. Arrange your data views by using the *Move Up* and *Move Down* buttons.
- f. When you are satisfied with the entries and their arrangement, click **OK** to close the interface and return to the main work area.

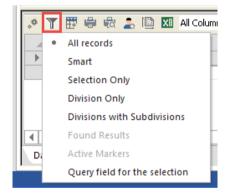
 Data View Quick Selector – this drop down menu enables rapid selection of available data views. This menu performs the same function as the *Current Box Layout* drop down menu available in the *Box Item* area. To use, simply open the menu and select the data view. It will be immediately applied.



8. **View Options** – provides a selection of display choices available in *Outline View*. By using sophisticated identification, ordering and tagging techniques these options utilize intelligent filtering – thereby allowing you see exactly the information you need to see, when you need to see it.

View Options can be accessed in the following ways:

- a. Main menu_- go to the **View** tab and check **Data Outline Pane** to choose the desired option.
- b. Outline View Control Bar click the View Options button.



The following choices are available:

- a. **All records** displays all the components on the entire chart, including all divisions and subdivisions.
- b. **Smart** displays only the selected components and their subordinates.
- c. **Division** displays only the components in the currently selected division
- d. **Division with Subdivisions** displays the current division and the subdivisions below it.
- e. **Found Results** this option works in conjunction with OrgChart's *Find* feature. Note: This option only becomes active after a successful search has been initiated. *Found Results* then displays the latest results of the search. To test this option, go to **Edit > Find** and run a search for an item you are certain is in the chart. After *Find* returns a positive result, go to **View Options** and select *Found Results*. The found component will appear in the *Outline View* area.
- f. **Show Hierarchy** toggles the *Outline View* between *hierarchy* and *list* formats (for visual examples of these styles, please see the *Outline View* section).

Chart Wizard

The Chart Wizard is a streamlined series of five consecutive screens which guide the user step– by– step through the process of making customized charts and templates.

Launching the Chart Wizard

To launch the Chart Wizard:

1. Click the File tab, then New, and then the Chart Wizard icon on the right.



Chart Wizard: Start and Load Settings screen

The wizard opens with the *Start and Load Settings* screen (see below):

Chart Wizard	This Chart Wizard will guide you through the chart creation process. If you need to create many similar
N R	dagam, jut prepare one that you like and save the settings. The next time you create a chart you will only need to load the settings and then make content adjustments as desired.
	Finish Next > Cancel Help

This screen contains the following options:

- 1. **Load Settings** from a previously saved chart (.tcw file). To Load Settings, do the following:
 - a. Click the **Load Settings** button.
 - b. Browse to the location of your .tcw file in the **Select Chart Wizard Settings File** box.

- c. Choose the file by double clicking the file name, or by highlighting the file and clicking **Open**.
- d. A "Settings loaded successfully" message will appear. From here you can either:
 - Click **Finish**. This will load the chart/template directly into the Main Work Area without modification. (Note: the "Finish" button will only become active once a file is loaded. Until then, it will remain grayed out.)
 - Click **Next**. This loads the chart/template into the wizard for additional modification. The next screen will then appear.

To complete this screen, select one of the following options:

- 2. **Next** start a new chart or modify a loaded template.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launches the OrgChart Help system.
- 5. Finish this option is only available when a previously designed chart or template has been loaded through the Load Settings command (see Load Settings, above). Until a chart is loaded, this button remains inactive (grayed out). Once a chart is loaded, click this button to load the template into the work area and close the wizard.

Chart Wizard: Chart Design screen

The second area of the Chart Wizard is the *Chart Design* screen (see below). Here you can specify the number of levels in a chart's hierarchy, how many subordinates are on each level and the appearance of each level's components.

Chart Wizard	level can have a different	r in tems of the number of levels in your organization. If desired, boxes for each color, border, connector and shape. Whatever settings you choose can be applied ing the "Set for All levels below" button.
Leve Leve	Levels: Level 1 Level 2 Level 3 Level 4	Bounded
\leq	Subordinates: 3 ÷	Fill Border Connector Set for All levels below
		< Back Next > Cancel Help

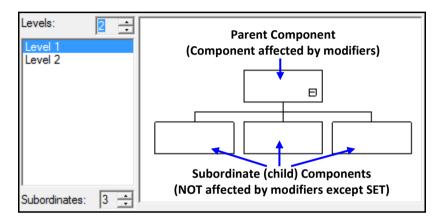
This screen contains the following:

1. **Preview Window** – the large area in the center of the screen which displays the component design for the currently selected level (see *Select Level*, below).

Important: The diagram in the Preview Window does not show the entire chart. Instead, it shows only a single (representational) component of the selected level and its immediate subordinates. A more accurate diagram of the entire chart appears later in the wizard.

- 2. **Levels** this field determines the number of levels present in a chart's hierarchy. This value will create a corresponding number of levels in the *Select Level* area. There are two ways to set the number of levels:
 - a. Click the small up and down arrows to increase or decrease the number.

- b. Place your mouse in the *Levels* area, highlight the number and type in a new numeric value. Select Level – displays a list of levels currently present in the chart. Highlight a level to display a single (representational) component of the level and its immediate subordinates in the *Preview Window*.
- 3. **Select Level** displays a list of levels currently present in the chart. Highlight a level to display a single (representational) component and its immediate subordinates in the *Preview* Window.



Example: Parent Component is from Level 1 because it is the actively selected layer

- 4. **Subordinates** this field determines the number of subordinate components present in a level's hierarchy. There are two ways to set the number of subordinates:
 - a. Click the up and down arrows to increase or decrease the number.
 - b. Place your mouse in the Subordinates area, highlight the number and type in a new numeric value.
- 5. **Total boxes** the total number of components (boxes) that will be present in the final chart. This counter is dynamic and instantly re-calculates every time a change is made to the chart hierarchy.

- 6. **Shape** this field contains a scrollable display of styles that can be applied to modify a component's outline. (For more details, please see the **Shapes** section.) To apply a shape in the wizard:
 - a. Highlight the desired level in the *Select Levels* area. A representational diagram of a single component from the level and its immediate subordinates will appear.
 - b. Choose an aesthetically pleasing design from the scrollable *Shapes* area.
 - c. Double click the chosen shape.
 - d. The shape will be automatically applied to the component in the *Preview Window*.
- Fill this button launches a multi– function, tabbed menu used to customize a component's color, gradient, pattern and can even apply pictures. (For more details on controlling this powerful menu, please see the Fill Styles section.)
- 8. **Border** this button initiates the **Border Style** menu. This controls the appearance of the line which defines a component's shape. From here you can control the style, width, transparency and many other attributes of a component's border. (For more details, please see the **Border Style** section.)
- 9. **Connector** this button launches the **Connector Style** menu. This interface controls the appearance of the line(s) which connect one component to another. (For more details, please see the **Connector Style** section.)
- 10. **Set** this command automatically applies the changes made to the parent component to all its subordinates.

Important: In the Chart Wizard, changes made through the Shapes, Fill, Border and Connector commands can only be applied directly to the components of the chosen level. To apply those changes to the subordinates, use the **Set** button.

To complete this screen, choose one of the following options:

- 1. Back return to the previous Chart Wizard screen.
- 2. Next proceed to the next Chart Wizard screen.
- 3. **Cancel** close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart **Help** system.

Chart Wizard: Data Fields Design screen

The third area of the Chart Wizard is the *Data Fields Design* screen (see below). Here, you can add, remove and customize the *Data Fields* associated with the components on any level.

🛃 Chart Wizard				×
OrgChart	At this step you Select level: Level 1 Level 2	can specify the data fields th Set field visibility: ☑ Name ☑ Title ☑ Use Default Layout Chart Data Set	at you want to appear in the boxes for each level.	
			< Back Next > Cancel He	elp

Note: Some buttons will be inactive (grayed out) under certain circumstances.

This screen contains the following:

- 1. **Select level** displays a list of levels currently present in the chart. Highlight a level to display a single (representational) component of the level in the **Preview** Window.
- Set field visibility a list of currently available *Data Fields*. To choose which field(s) will appear in your components, click in the box next to a field. A check mark will appear in the box and the field will appear in the component.
- 3. **Preview** the large area on the right side of the screen which displays the component and data field design for the currently selected level.
- 4. **Modify Diagram Fields** this area contains six commands. To use these functions, do the following:

- a. Choose a level in the **Select level** window.
- b. Highlight a field in the **Diagram fields** area.
- c. Choose from the following commands:
 - Add launches the New Data Field box (see below):

🗃 New Data Fi	eld	×
Data Field Name	Example	
Data Field Type	Calculated	
	✓ Include in calculation	Formula
	ОК	Cancel

From here, you can create new data fields which will be added to the *Diagram Fields* area of the Chart Wizard and all *Data Fields* areas of your project. (For more details, see the New Data Field section.)

- Remove deletes a data field from the *Diagram Fields* area.
- Move Up moves a data field entry up the *Diagram Fields* list. Note: the Move Up button will be inactive (grayed out) if the data field is already at the top of the list.
- **Move Down** moves a data field entry down the *Diagram Fields* list. Note: the Move Down button will be inactive (grayed out) if the data field is already at the bottom of the list.
- **Field Font** launches the **Font** menu for setting the preferred type style. Each different field can have its own unique font settings and look (please see the *Font Style* section for more details).
- Set Value automatically inserts a User defined value (text or numeric) into a chosen data field for every component of a given level. (For example, you could place the word "*Manager*" automatically in the *Title* data field for every component of Level 1, or the name of your organization to appear in the *Company* data field for every component of Level 2, etc.).

Click the **Set Value** button to launch the **Default field value** box (see below):

🔀 Default field value	
Input default value for the field "Name "	ОК
	Cancel
	Help

- [°] Enter a value in the **Input default value** field.
- [°] Choose one of the following options:
 - **OK** accepts your choice and applies it to the data field.
 - ° **Cancel** closes the panel without saving any data.
 - **Help** launches the Help menu.

Note: In the Chart Wizard, changes made through the above data field commands are only to be applied directly to the components of the chosen level. To apply those changes to the subordinates, use the **Set** button.

To complete the Data Fields Design screen, choose one of the following options:

- 5. **Back** return to the previous *Chart Wizard* screen.
- 6. Next proceed to the next *Chart Wizard* screen.
- 7. **Cancel** close the wizard without saving and return to the Main Work area.
- 8. **Help** launch the *OrgChart* Help system.

Chart Wizard: Customizing components for each level

The fourth area of the Chart Wizard is the **Chart Wizard** screen (see below). From here, you can add, remove and modify components for any level, use the **Arrange** features to create the overall look and structure of your chart and even save your design for future use with the **Save Settings** command.

Chart Wizard			also modify the data within boxes for any level. Use the ance. Click on Save Settings to save your design.	×
	B-2 <name></name>	Add Remove Modify Arrange >>		
		Save Settings	< Back Next > Cancel H	lelp

Note: Some buttons will be inactive (grayed out) under certain circumstances.

This screen contains the following:

1. **Outline Structure** area – displays an expandable list (tree) of components currently present in the chart. Click on a selection in this view to highlight its corresponding component in the *Preview Window*.

Important: components can only be selected in the Outline Structure area. They cannot be chosen in the Preview Window.

- 2. **Preview Window** the large area on the right side of the screen which displays the overall appearance of the chart.
- 3. **Modification buttons** to use these functions, first highlight a selection in the *Outline Structure* area, then choose from the following commands:
 - a. Add adds a new subordinate component to the currently highlighted selection.
 - b. **Remove** deletes the currently selected component from the chart.

- c. Modify opens the Data Properties menu for the selected item.
- d. **Create Division** creates a new Division (for more information, see the *Divisions* section).
- e. **Arrange** opens up a menu of twelve automated arrangement options. (For more information on auto– arranging components, see the *Arranging subordinate components* section).
- 4. Save Settings As this command allows you to save your chart as a template for future use. When the Save As interface opens, choose the location and name of your chart, then choose Save to save the chart as a .*tcw* file or Cancel to quit the menu without saving.
- To retrieve and load your template open the Chart Wizard and choose Load Settings on the *Start and Load Settings* screen (please see the *Chart Wizard – Start and Load Settings* section for details).

To complete this screen, choose one of the following options:

- 6. **Back** return to the previous *Chart Wizard* screen.
- 7. Next proceed to the next *Chart Wizard* screen.
- 8. **Cancel** close the wizard without saving and return to the Main Work area.
- 9. **Help** launch the *OrgChart* Help system.

Chart Wizard: Finish screen

The fifth and final section of the wizard is used to save your chart as a new document, a new chart or part of an already active chart (see below).

Chart Wizard	Specify the destination, where the chart will be created. It could be separate document, separate new chart within the current document or the existing current chart. New Project New Chart Current Chart	
SA NO		
	< Back Finish Cancel Help	

- 1. Click in the radio button to choose from the following:
 - a. **New document** will save the chart as a new document.
 - b. **New chart** creates a new, separate chart within the current document or active chart.
 - c. Active chart places the data into the currently active chart (regardless if the current chart has components already present or not).

To complete this screen, choose one of the following options:

- 2. Back return to the Chart Wizard Chart Wizard screen.
- 3. Next complete the wizard and enter the Main Work area.
- 4. Cancel close the wizard without saving and return to the Main Work area.
- 5. **Help** launch the OrgChart **Help** system.

Multiple Charts and Tabbed Browsing

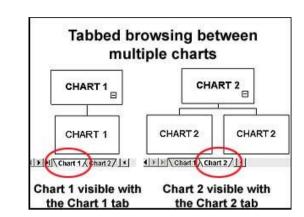
OrgChart allows you to work with several charts at the same time. This can be useful when scenario planning and for copying and pasting from one chart to another. A tabbed browsing interface is used to switch between the charts (see below).

-	
	CHART 1
Name =] 🎗 CH	MChart 1 Chart 2
Data 16a	w Divisions View

Important: Tabbed browsing is only available when more than one chart is open.

1. **To add or open multiple charts** – Right click on a chart tab and select **Add**. A new chart will appear in the Main Work Area and a new tab will be placed on the chart browser. A new tab will appear for each new chart that is added.





2. To browse between charts – click the chart's corresponding tab.

3. To remove a chart tab from the browser – close the chart.

Chapter 3: Working with other formats

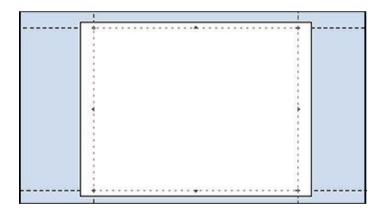
Now that you have mastered chart creation, it is time to share your vision. To do that, this chapter will teach you how to print, import, export and publish – and in no time at all, you will be sharing your masterpieces with the world.

Printing

Factors to consider when preparing a chart for printing include the number of pages, position of the components, page orientation and additional considerations (depending on each individual project).

Print Layout View

This mode is optimized for chart printing. When in this view: 1) dotted "printer safe" lines will appear in the work area and 2) several grayed out areas of the Print Toolbar will become active.



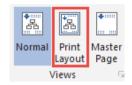
From this mode, you can:

- 1. Add and delete print pages.
- 2. Change page orientation between Portrait and Landscape modes.
- 3. Arrange multiple pages to optimize the printing of oversized charts (charts larger than a single page).

Activating Print Layout view

There are two ways to activate the Print Layout view:

- 1. Go to the **File tab** and **Print**.
- 2. Go to the **View tab** and select **Print Layout**.



Print Preview

The Print Preview screen displays what a chart will look like before actually printing.

¢	OrgChart Polestional - Greenbox 7.2 calc 1 $- \theta imes$
	Print 🔿
	Biet Copies: 1 1
	Printer
	Mark Pringle Tedveld Director
	Salary : \$8,000,00
	Settings
	Print All Pages Designer Scient Manage Deem Print the entire document Hadowrit 10 MID Laws 110
	From: 1 To: 8
	Collated 1,23 1,23 1,23
	Pad Mithain Bahat Prys 2017 Mithain Bahat Prys 2017 Mithain Bahat Prys 2019 Data Mithai
	Paradovat 7 (2000) Letter 8.Sxilin. 100 100 100 100 100 100 100 1
	Dial Fore Stap

To access the *Print Preview* screen go to the **File** tab and select **Print**. To exit *Print Preview* click the back arrow button at the top left of the screen.

Printing Single Page Charts

Press the **Print** button on the *Print screen* (see above).

Printing Multiple Page Charts

OrgChart can print charts which range from a single page to mega-sized charts that fill an entire wall. To print these charts:

1. Open the **Page Setup** menu by choosing **File** tab, then click **Chart Page Setup** (see below).

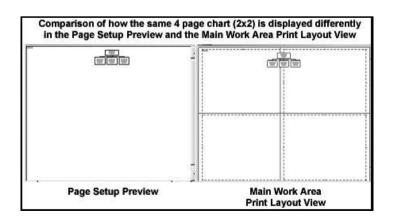
	Settings
Print	Gerry Smith
Print Outline	Print All Pages Print the entire document Pr
Share	Find the characteristic Samy - \$140,000.00 6 From: 1 To: 8 0 0
Publish	Collated
Export	
Close	Landscape Orientation
Account	Letter 8.5x11in. 21.59 cm x 27.94 cm
Options	Chart Page Setup
Exit	✓ Page 8 ▶
	🕈 Page Setup
	+
	greenbox
	88888888888888888888888888888888888888
	Layout Pages Restore Printer
	Remove transparency (Might improve quality when printing to Adobe Print Driver)
	Paper Size: Letter 8.5x11in.
	Source: Tray 1
	Margins (inches)
	Left: 0.584 Right: 0.584
	Top: 0.375 Bottom: 0.375
	OK Cancel Help

2. Choose the Layout Pages button to launch the Layout Print Pages box.

ත් Layout	Print Pages ×
Fit Chart On	1 r Pages in Height
Orientation Dertrait OLandscape	Apply to © Entire Chart ○ Current Division
<u>0</u> K	<u>Cancel</u> <u>H</u> elp

- a. For oversized charts (charts more than one page) set the number of pages to more than one in the *Pages in Width* and/or the *Pages in Height* field.
- a. For single page charts leave the *Pages in Width* and *Pages in Height* fields set at **1**.
- 3. To complete the process select:
 - a. **Orientation** click a radio button to set the page orientation to either **Portrait** or **Landscape**.
- 4. Choose **OK** to accept the settings and close the **Layout Print Pages** box.
- 5. On the *Print Setup Page* choose either **Print** to go directly to the print interface or **OK** to return to the Main Work area.

Note: The Preview window on the Page Setup screen will only show the chart in relative size to the entire work area. To see how the chart actually flows across the different pages, close the Page Setup menu, return to the Main Work area and choose Print Layout View (see below).



Importing files

Importing files is a powerful way to take complex data created in other programs (such as Excel) and convert them into captivating, easy to understand charts.

Supported formats

OrgChart can import the following formats:

- 1. Microsoft Excel files.
- 2. Microsoft Outlook contacts.
- 3. CSV (Comma Separated Values) files.
- 4. Active Directory / LDAP
- 5. Microsoft SQL Server
- 6. XML Document (OrgChart Schema)
- 7. Oracle
- 8. Tab delimited files
- 9. OrgChart Now files
- 10. **OLE DB DataSource**. OrgChart supports the following OLE DB Data sources:
 - a. Microsoft ISAM 1.1 OLE DB Provider.
 - b. Jet 4.0 OLE DB Provider.
 - c. Microsoft OLE DB Provider for Indexing Service.
 - d. Microsoft OLE DB Provider for Internet Publishing
 - e. Microsoft OLE DB Provider for ODBC Drivers.
 - f. Microsoft OLE DB Provider for OLAP Services.
 - g. Microsoft OLE DB Provider for Oracle.
 - h. Microsoft OLE DB Provider for SQL Server.
 - i. MS Data Shape.
 - j. OLE DB Provider for Microsoft Directory Services.

Import Wizard

To open the **Import Wizard** – go to the **File** tab and select **Import**.

Import Wizard overview

The wizard uses the same basic system to import all six formats. Although some formats have unique screens for entering more technical settings, they all have the following in common:

- 1. All formats begin the same in the wizard. They all start with: 1) the introduction screen and 2) a page to select the import format.
- 2. All formats finish the same in the wizard. They all end with a Finish screen.
- 3. All formats use the same basic navigation buttons. Most pages have Back, Next, Cancel and Help buttons at the bottom of the screen to move back and forth through the wizard.

TIPS:

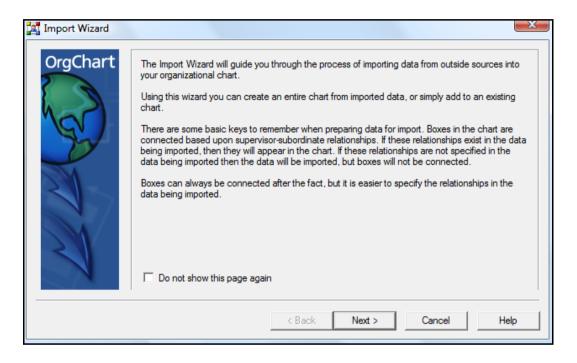
- 1. The data you intend to import must have a hierarchical structure for the import to succeed.
- 2. Until the final (*Finish*) screen, you can move back and forth through the wizard to change your choices before you commit to the final import.

This manual will take you step– by– step through the import process by importing an Excel document.

Import Wizard – Importing Excel

To import Microsoft Excel, launch the wizard and proceed through the following screens.

Import Wizard – Importing Excel – Introduction screen



This screen is the first step for all publishing formats. To complete this page, choose one of the following options:

- 1. Check the **Do not show this page again** box if you do not wish the introduction screen to appear the next time the wizard is launched.
- 2. Next proceed to the next Import Wizard screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Import Wizard – Importing Excel – Selecting import format

This screen offers multiple import choices (see below).

OrgChart	In this step you will use the Import Wizard to choose from where the data will be imported. Note: Depending upon your choice other steps of the Wizard will be looking differently.	
	 O Microsoft Excel File 	-
n a ci	Comma Separated Values (CSV) File	
W	Microsoft Outlook Contacts	
Vord	OLE DB DataSource	
	 Lightweight Directory Access Protocol (LDAP) DataSource 	
Excel	OXML Document (OrgChart Professional Schema)	
<	⊖ Microsoft SQL Server	
XML	⊖ Microsoft Access	
	Microsoft Project	
	Microsoft SharePoint Server	
CSV		

- 1. **Click** in a radio button to select which format to import. Choose from the following:
 - a. Microsoft Excel files.
 - b. Comma Separated Values (CSV) files.
 - c. Microsoft Outlook contacts.
 - d. OLE DB DataSource.
 - e. Lightweight Directory Access Protocol (LDAP) DataSource.
 - f. XML Document (OrgChart Schema).
 - g. Microsoft SQL Server
 - h. Oracle
 - i. Microsoft Access
 - j. TAB delimited text files
 - k. OrgChart Now files

To complete this screen, choose one of the following options:

- 2. Back return to the previous Import Wizard screen.
- 3. Next proceed to the next Import Wizard screen.
- 4. Cancel close the wizard without saving and return to the Main Work area.
- 5. Help launch the OrgChart Help system.

Import Wizard – Importing Excel – Selecting source file

This screen is used to choose which file to import (see below).

Select source file	
OrgChart	Specify the location from which the organization data will be imported. Use the "Browse" button or type in the location destination path manually.
STANK IN	C:\OrgChart\Chart 1.xls Browse
	< Back Next > Cancel Help

To select the file to import:

- 1. Click the **Browse** button. The **Open** menu will appear.
- 2. Browse to a location and select a file to import.
- 3. Click **Open**.
- 4. The destination path will be displayed in the **Publishing Wizard**.

To complete this screen, choose one of the following options:

- 5. Back return to the previous Import Wizard screen.
- 6. Next proceed to the next Import Wizard screen.
- 7. Cancel close the wizard without saving and return to the Main Work area.
- 8. **Help** launch the OrgChart Help system.

Import Wizard – Importing Excel – Selecting data tables

This screen allows you to choose from available Excel tables and view their data fields (see below).

Import Wizard		×
OrgChart	Choose the data table to import from and verify that OrgChart Professional is hierarchy correctly. Chart_1S Chart_1S Chart_1S Columns: Records: Name Title OrgChart Parent Component 1 Component 2 Component 3 Status: Ok	building the chart 11 4 Options >>
	< Back Next > Can	cel Help

This screen contains the following:

- 1. **Available tables** field this scrollable pane displays all the available Excel tables. Highlight a table to display its attributes in the *Table Overview* and *Data Field* display areas.
- 2. **Table Overview** displays the number of *Columns* and *Records* in the selected table.
- 3. **Data Field display** area this field is used to preview the data being imported.

To complete this screen, choose one of the following options:

- 4. **Back** return to the previous **Import Wizard** screen.
- 5. Next proceed to the next Import Wizard screen.
- 6. **Cancel** close the wizard without saving and return to the Main Work area.
- 7. **Help** launch the OrgChart Help system.

Import Wizard – Importing Excel – Setting hierarchy

OrgChart	At this step you can modify autodetected chart hierarchy or establish hierarchy manually by selecting correct "Position" and "Reports To" columns. O No hierarchy C Single column Position: Name Position: Name Reports to: Title OrgChart Parent Component 1 Component 3 OrgChart Parent Component 3 Dotted-line hierarchy
	< Back Next > Cancel Help

This screen is used to set a simple hierarchy (see below).

The hierarchy can be set either manually or automatically.

To automatically set the hierarchy:

- 1. **Do nothing** Leave the *Define chart hierarchical structure* box checked_and click the **Next** button at the bottom of the screen to move to the next page.
- 2. **Uncheck** the *Define chart hierarchical structure* box (In this configuration, the "*Position*" and "*Report to*" fields will be inactive and appear grayed out).

To manually set the hierarchy:

- 1. Make certain there is a **check** in the *Define chart hierarchical structure* box. The "*Position*" and "*Report to*" fields will become active.
- 2. Choose an available data field from the "*Position*" drop down menu.
- 3. Choose an available data field from the "*Reports to*" drop down menu.

IMPORTANT: unless the "First data row contains column names" box was checked

on the previous page, only generic database headings will be available (i.e. F1, F2, F3, etc.).

A diagram of the data fields in a simple hierarchical structure is visible in the preview area on the right of the screen.

To complete this screen, choose one of the following options:

- 1. Back return to the previous Import Wizard screen.
- 2. Next roceed to the next Import Wizard screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Import Wizard – Importing Excel – Organizing data fields

This screen is used to select which data fields will appear in the final OrgChart. It can also be used to set the data field order (see below).

	News	T	Mertile.	Diselaura	Ē	New
ACL	Name Name	Type Name	Visible	Display name	F	New
4	Title				Σ	Add Predefined
						Delete
						Set Title
						Remove Key
						Move Up
2	•				Þ	Move Down
	, Manage Syste	em columns Res	et 1			

- 1. **To modify the list of available data fields** highlight a field and choose from the following:
 - a. **Add** adds a data field to the list.
 - b. **Remove** deletes a data field from the list.
 - c. **Reset** restores the default data field setup.
 - d. **Move Up** moves an item higher on the list. This option is inactive if the selection is already at the top.
 - e. **Move Down** moves an item lower on the list. This option is inactive if the selection is already at the bottom.
- 2. To complete this screen, choose one of the following options:
 - a. Back return to the previous Import Wizard screen.
 - b. Next proceed to the next Import Wizard screen.
 - c. Cancel close without saving and return to the Main Work area.
 - d. Help launch the OrgChart Help system.

Import Wizard – Importing Excel – Selecting import destination

This screen is used to set divisions and save your chart as a new document, a new chart or part of an already active chart (see below).

	could be data within the exi	sting, current org	chart.	
	Create divisions:			
Su	C At Level			Enter level numbers, separated by
	C Every		-	semicolons or commas. Example: 2,4;6
	C Using field	Name	- -	
37	Import data to:			
	New Project			
\geq	O New Chart			
	C Current Chart			

- 1. Click in the radio button to choose from the following:
 - a. **Do not create** (Division) no divisions will be created.
 - b. At Level (Division) enter level numbers, separated by semicolons or comas to specify where the divisions will be created.
 - c. **Every** (Division) use the drop down menu to reveal the choice of currently available options.
 - d. **Using field** specifies which field you wish to use. Expand the drop down menu to reveal a list of the currently available choices.
 - e. **New Project** creates a new chart based on the imported information. This option automatically closes any currently open OrgCharts, so you must save any open projects or they will be lost.
 - f. **New Chart** creates a new chart in the current OrgChart session. This chart can be accessed through the tabbed browsing feature.
 - g. Current chart places the data into the currently active chart.

To complete this screen, choose one of the following options:

- 2. Back return to the previous Import Wizard screen.
- 3. Next proceed to the next Import Wizard screen.
- 4. **Cancel** close the wizard without saving and return to the Main Work area.
- 5. **Help** launch the OrgChart Help system.

Import Wizard – Importing Excel – Results page

This screen displays your intermediate importing results. This page generates its report automatically after the previous wizard screen is completed.

All results, messages or errors are displayed in the **Progress report** area. To complete this screen, choose one of the following options:

- 1. **Back** return to the previous **Import Wizard** screen.
- 2. Next proceed to the next Import Wizard screen.
- 3. **Cancel** close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Import Wizard – Importing Excel – Finish screen

This screen displays the final results of your import (see below). This page generates its report automatically after the previous wizard screen is completed.

1	Import Wizard	×
OrgChart	The Wizard is providing you with progress information	
	Progress report:	
5	Wizard controller reports no errors Wizard processor is ready to be executed	*
No. 10		Ŧ
	< Back Next > Cancel	Help

All final results, messages or errors are displayed in the **Progress report** area. To complete this screen, choose one of the following options:

- 1. **Finish** complete the wizard and return to the Main Work area.
- 2. Cancel close the wizard and return to the Main Work area.
- 3. Help launch the OrgChart Help system.

Importing Databases - the Data Link Properties Screen

When importing OLE DB DataSource, the **Data Link Properties** screen is used to choose the database provider, test the connection, set access permissions and specify many other important settings (see below).

OLE DB Provider(s) Microsoft ISAM 1.1 OLE DB Provider Microsoft OLE DB Provider for Indexing Service Microsoft OLE DB Provider for Indexing Service Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for OTAcle Microsoft OLE DB Provider for SQL Server Microsoft OLE DB Simple Provider MSDataShape OLE DB Provider for Microsoft Directory Services	Select (he data you want to connect to:						
Microsoft Jet 4.0 DLE DB Provider Microsoft DLE DB Provider for Indexing Service Microsoft DLE DB Provider for Internet Publishing Microsoft DLE DB Provider for ODLAP Services Microsoft DLE DB Provider for OLAP Services Microsoft DLE DB Provider for OLAP Services Microsoft DLE DB Provider for SQL Server Microsoft DLE DB Simple Provider MSDataShape	OLE	D8 Provider(s)						
Microsoft OLE DB Provider for Indexing Service Microsoft OLE DB Provider for Internet Publishing Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for OLAP Services Microsoft OLE DB Provider for OLAP Service Microsoft OLE DB Provider for SQL Server Microsoft OLE DB Simple Provider MSDataShape	1							
Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for OLAP Services Microsoft OLE DB Provider for Oracle Microsoft OLE DB Provider for SQL Server Microsoft OLE DB Simple Provider MSDataShape	Micr	osoft OLE DB Provider for Indexing Service						
Microsoft DLE DB Provider for OLAP Services Microsoft DLE DB Provider for Oracle Microsoft DLE DB Provider for SQL Server Microsoft DLE DB Simple Provider MSDataShape								
	Micr Micr Micr MSD	ocoll OLE DB Provider for Oracle ocoll OLE DB Provider for SQL Server ocoll OLE DB Simple Provider DataShape						
	OLE	DB Provider for Microsoft Directory Services						

To access the Data Link Properties screen:

- 1. Go to **File > Import** to launch the Import Wizard.
- 2. Click **Next** on the *Introduction* screen.
- 3. Choose **OLE DB DataSource** as the import format.
- 4. Click **Build** on the connection parameters page.
- 5. The Data Link Properties screen will appear.

Data Synchronization

OrgChart provides the latest in dynamic project creation through Data Synchronization – an on-the-fly method of updating a chart's information in almost real time. With this amazing tool, you can constantly – and automatically – update your OrgChart by linking it to a database containing your latest information. Then, by simply clicking a button, or setting OrgChart to resynchronize when launched, your chart will instantly reflect any new changes – without additional effort on your part.

OrgChart makes this possible because it automatically remembers the location of any database you import. It can then find that database at a later time and import any changes that have been made.

OrgChart even has the ability to link into different databases. So if you decide to store your chart's information in another file, OrgChart can be instructed where to look. It can then retrieve the data and update your chart accordingly.

IMPORTANT NOTE: to enable Data Synchronization, the information must first be imported from an external database file (such as Microsoft Excel).

Special OrgChart Tip: if you wish to first construct a chart, and then make Data Synchronization possible, use the Export Wizard and save your project's information as an Excel file (or other supported format). Then go to the **Data** tab and select **Resync Properties** to map to the database file you just created. Data Synchronization will now be available for that chart.

Data Synchronization is perfect for:

- 1. Adding and removing personnel.
- 2. Changing and assigning supervisors.
- 3. Changing the values in any field.
- 4. Adding and removing data fields to the chart.

	A	В	С		Parent	
1	Name	Title	Note		Data Sync	
2	Parent	Data Syr	nc Unchanged		Unchanged 🖃	
3	Child 1	Data Syr	nd Unchanged	Child 1	Child 2	Child 3
4	Child 2	Data Syr	nd Unchanged	Data Sync	Data Sync	Data Sync
5	Child 3	Data Syr	nc Unchanged	Unchanged	Unchanged	Unchanged
1 2	Name Parent		Note nc Changed		Data Sync Unchanged	
	A	В	С		Parent	
		Data Svr	nd Changed			
3	Child 1		nd Changed			
4	Child 2		nc Changed	Data Sync	Child 2 Data Sync	Child 3 Data Sync
-	Child 3	Data Svr	nc Changed	Unchanged	Unchanged	Unchange
5						
		hanged b h b Title	ut chart displays as not yet been s C Note			
D a	A Name	hanged b h B Title Data Syr	ut chart displays as not yet been s C Note nc Changed	synchronized	Parent Data Sync Changed ⊟	its data
D a	A A Name Parent	Hanged b h B Title Data Syr Data Syr	ut chart displays as not yet been s C Note		Parent	

Setting up a chart to use Data Synchronization:

Note: OrgChart has the ability to import many different types of database. For detailed instructions – and illustrations – on importing data please see the *Import Wizard* section of this manual.

1. Go to the **File** tab and select **Import** to launch the **Import Wizard**.

- 2. Follow the wizard's step-by-step instruction screens to choose the import format, source file, and select the other appropriate options for your chart. Click **Finish** on the final screen. The chart will appear in the main work area.
- 3. Decorate and customize the chart to reflect the needs of your project.
- 4. When you change your data source information in the future, you will be able to use Data Synchronization to update your chart to reflect those changes.

Using Data Synchronization:

Now that you have an appropriately constructed chart, do the following to enable Data Synchronization.

- 1. Open the chart you want to synchronize.
- 2. Open the **Chart** menu on the main toolbar.
- 3. Click on **Resync Data**.
- 4. The data in your chart will update to reflect any changes that were applied in the source database.

Automatic Data Synchronization (only available in certain versions):

A chart can be set to synchronize its data on load up. To do this:

- 1. Open the **Chart** menu on the main toolbar.
- 2. Click on **Resync At Load**. (Click this option again to toggle on & off.)
- 3. The chart will automatically synchronize its data the next time it loads.

Data Synchronizing from a different database or data location:

OrgChart can be set to synchronize data from different data sources or the same file in different locations. To change the Data Synchronization path:

- 1. Open the **Chart** menu on the main toolbar.
- 2. Click on **Resync Properties**.
- 3. The Import Wizard will launch. Work through the screens.
- 4. On the **Selecting source file** screen, select the new file or location.
- 5. Finish the Wizard as normal. Your new source path will be set.

Importing LDAP – Special Considerations

Many of the unique settings necessary for a successful LDAP import are entered on this connection parameters screen (see below).

Import Wizard	×
OrgChart	At this step you need to specify LDAP (Lightweight Directory Access Protocol) connection parameters to allow OrgChart Professional to connect to the LDAP server and list the data that will be imported. LDAP connection string: Base entry DN (may be blank): Log on settings: © Use your current logon © Specify custom usemame and password:
·	Usemame (<domain>\<usemame> or <usemame>@<domain> format): Password: Cancel Help</domain></usemame></usemame></domain>

When importing LDAP, take the following into consideration:

- 1. Make certain the server you are importing from is up and running.
- 2. Obtain the **Root DN** and **Root Password** information. This information is usually found on the server's slapd.conf configuration file. (In the file, look for the name of the root object (**rootdn**) and the password (**rootpw**).
- 3. Use the information gathered in Step #2 to fill in the **Username** and **Password** fields of the LDAP connection parameters box (pictured above).
- 4. Make certain you correctly enter the LDAP connection string before proceeding to the next page.

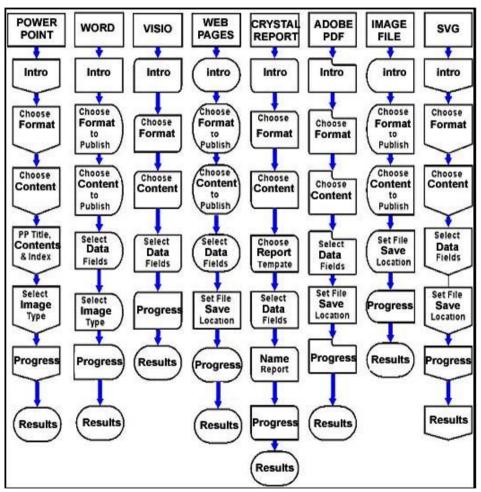
Publishing Charts

Publishing is a powerful process which exports certain file formats, then can immediately open up the associated program and display the results. (For example, if you publish an OrgChart to MS Word, the chart would be saved in MS Word format and then Microsoft Word would automatically load and display your chart.) In addition, OrgChart Professional now offers Flash Publishing, which harnesses the power of Macromedia Flash – one of the worldwide standards for internet graphics. So now your charts can be posted on the internet and are viewable in any browser installed with Macromedia Flash Player 8 or later (available for free download at http://www.adobe.com).

OrgChart publishes the following formats:

- 1. Interactive PDF
- 2. Microsoft PowerPoint
- 3. Microsoft Word
- 4. Microsoft Visio
- 5. Web Pages with HTML5
- 6. Crystal Report
- 7. Adobe PDF
- 8. Image File
- 9. Flash

The Publishing Wizard incorporates the same essential workflow for all supported formats. However not all screens are used for all publishing. The following listing of wizard screens is in approximate order from start to finish, but will vary with each individual format (see below).



Publishing Wizard Workflow for Each Format

Note: all formats begin with the same three screens. All formats also end with the same two final screens, except for Crystal Reports which launches an additional Report Viewer.

Publishing Wizard – Introduction screen

This screen welcomes you to the Publishing Wizard (see below).

🚉 Publish Wizard		x
OrgChart	The Publish Wizard guides you through the process of publishing data from your organizational chart to a variety of presentation applications.	
	< Back Next > Cancel Help	

This screen is the first step for all publishing formats. To complete this page, choose one of the following options:

- 1. Check the *Do not show this page again* box if you do not wish the introduction screen to appear next time the wizard is launched.
- 2. Back return to the previous Import Wizard screen.
- 3. Next proceed to the next Import Wizard screen.
- 4. **Cancel** close the wizard without saving and return to the Main Work area.
- 5. **Help** launch the OrgChart Help system.

Publishing Wizard – Select publishing format

This screen offers eight publishing options (see below)

r <mark>6</mark>	Publish Wizard	×
Word	Select the destination application that you want to publishing to.	
Excel	Interactive PDF	
77	⊙ Web Pages HTML5	
XML	⊖ Flash	
XML	🔿 Image File 🛛 🔁	
Xer	O Microsoft Word	
CSV	O Microsoft Visio	
OrgChart	OrgChart Now - Cloud	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	

- 1. Click in a radio button to select which format you want your chart to be published in. Choose from the following:
 - a. Interactive PDF
 - b. Microsoft PowerPoint
 - c. Web Pages HTML5
 - d. Flash
 - e. Image File
 - f. Microsoft Word
 - g. Microsoft Visio

To complete this screen, choose one of the following options:

- 2. Back return to the Publish Wizard Introduction screen.
- 3. Next proceed to the Select data source screen.
- 4. **Cancel** close the wizard without saving and return to the Main Work area.
- 5. **Help** launch the OrgChart Help system.

Publishing Wizard – Select content scope

This page sets exactly what part of your chart is going to be published (see below).

Publish Wizard	×
	Select the source content to publish from.
OrgChart	Current Chart C Active Sheet C Selection
	< Back Next > Cancel Help

- 1. Choose from one of the following options:
 - a. Active chart exports the chart and all additional (hidden) subcharts.
 - b. Active sheet exports only the currently displayed sheet.
 - c. Selection only exports only components currently selected.

Note: not all options will be available for all publishing formats. Unavailable selections will be inactive (grayed out).

- 2. Choosing **Next** will send each format to the following Publishing Wizard screens. For each selection, please go to the corresponding area to complete the next stage of the publishing process:
 - a. Word, Visio, Web Pages, Adobe PDF and SVG Select data fields.
 - b. **PowerPoint** Configuring PowerPoint titles, contents and index pages.
 - c. **Flash** Choose destination file path.

The following navigation options are also available at the bottom of the page:

- 3. **Back** return to the previous wizard screen.
- 4. **Cancel** close the wizard without saving and return to the Main Work area.
- 5. **Help** launch the OrgChart Help system.

Publishing Wizard – Set data fields

This screen determines which data fields will appear in your published chart.

OrgChart	Select the desired data fields th	at you want to publish fr	om the list of availa	ble "Current helds".
	Defined Data Views:			
-1	Available columns:		Output columns:	
TA	Supervisor	Add ->	2 Name	
7	Phone Office E-Mail Office	Add all	Title	
A	E Team Budget	<- Remove	1	
62	Salary 1 Load Load Loadcount	Remove al	J	
St I			Move Up	Move Down

Note: 1) This menu applies to all formats except PowerPoint and Image File. 2) For Crystal Reports, an additional screen for choosing report templates will appear prior to this menu. (For more details, see Publishing Wizard – choosing report templates.)

Macromedia Flash Publishing Tip: For privacy purposes, choose only the fields you want to appear in the final, published version.

Data fields are chosen by making selections from the **Available columns** pane and transferring them to the **Output columns** pane.

To move items between panes simply highlight a selection and use the appropriate button. The following options are available:

- 1. Add moves a selection from the Available columns pane to the Output columns pane.
- 2. Add all moves all the selections from the Available columns pane to the Output columns pane.
- 3. **Remove** moves a selection from the **Output columns** pane to the **Available columns** pane.
- 4. **Remove all** moves all the selections from the **Output columns** pane to the **Available columns** pane.

The following options are available in the **Output columns** pane only:

- 1. **Move Up** moves an item higher on the list. This option is inactive if the selection is already at the top.
- 2. **Move Down** moves an item lower on the list. This option is inactive if the selection is already at the bottom.

Choosing **Next** will send each format to the following Publishing Wizard screens. For each selection, please go to the corresponding area to complete the next stage of the publishing process:

- 1. **Word** the Select image type interface.
- 2. Visio the Progress screen.
- 3. Web Pages the Choosing the destination file path screen.

The following navigation options are also available at the bottom of the page.

- 1. **Back** return to the Select data source screen.
- 2. Cancel close the wizard without saving and return to the Main Work area.
- 3. **Help** launch the OrgChart Help system.

Publishing Wizard – Configuring PowerPoint titles, contents and index pages

This page is unique to PowerPoint and applies to no other formats. This interface is used to set the title, contents and index pages (see below).

Publish Wizard	
	Configure the Index page with a title, table of contents, and your choice of a key field for the index age. ✓ Include Title Page Title: Chart 1 ✓ Include Contents Page ✓ Show division title Show division manager's manager ✓ Include index page Index: R Name
	< Back Next > Cancel Help

- 1. **Include Title Page** check this box to add a title page to your PowerPoint presentation.
 - a. Title field type your presentation's title in this field.
- 2. **Include Contents Page** check this box to add a contents page to your PowerPoint presentation.
- 3. Show division title check this box to have the title appear on every page.
- 4. Show division manager's manager check this box to have this information appear on every page.

- 5. **Include Index Page** check this box to add an index to your PowerPoint presentation.
 - a. **Index** expand the drop down menu and choose a field to index. This list is composed of the default data fields present when a component is first placed on a chart.
 - Sort: Ascending / Descending click the appropriate radio button to specify if you wish the index to sort the selected index field in ascending or descending order.
- 6. Choose Next to proceed to the Selecting image properties screen.

The following navigation options are also available at the bottom of the page.

- 7. **Back** return to the previous wizard screen.
- 8. **Cancel** close the wizard without saving and return to the Main Work area.
- 9. **Help** launch the OrgChart Help system.

Publishing Wizard – Selecting image properties (PowerPoint and MS Word only)

This screen is used to set the published data as a bitmapped image or metafile. It is only used for PowerPoint and MS Word.

Publish Wizard	
	Choose the parameters of the image, which will represent the organizational chart inside the publication. Selection of Metafile with "Maximize chart area" gives an image that can be easily resized on the final output.
TAP	O Bitmap image
	• Metafile
OrgChart	I Maximize chart area
	< Back Next > Cancel Help

- 1. Choose a publishing option:
 - Bitmap image
 - **Metafile** (recommended)
- 2. Choose **Next** to proceed to the Progress screen (all formats).

The following navigation options are also available at the bottom of the page.

- 3. **Back** return to the previous wizard screen.
- 4. **Cancel** close the wizard without saving and return to the Main Work area.
- 5. **Help** launch the OrgChart Help system.

Emailing a Chart

OrgChart makes it easy to share your creations with friends and colleagues. Among the many forms of export available, OrgChart provides the option to email your charts.

Tip: Save your chart with a unique name before emailing it. Otherwise, OrgChart will assign an automatically generated name (such as OrgChart1.toc, OrgChart2.toc, etc.) to the file it attaches to the email.

To email your chart:

- 1. Go to the **File** menu.
- 2. Choose Share / Send as Attachment.
- 3. Your default email client will launch in Compose mode with your OrgChart already attached (the chart will appear as a *.toc file).
- 4. Address and compose your email message as you normally would.
- 5. Send your email.
- 6. Your message will arrive to its addressee with your chart (as a *.toc attachment) ready to download and view.

Exporting Charts With the Export Wizard

Exporting is the process of saving OrgCharts in formats that can be opened and utilized by other programs. In OrgChart, this is done through the **Export Wizard**. The wizard can export to the following formats:

- 1. Comma Separated Values (CSV) File.
- 2. Microsoft Excel.
- 3. XML Document (OrgChart Schema).
- 4. OLE DB DataSource.

OrgChart Professional with other formats

The export process is virtually identical for all these formats. The only exception is during the path selection phase, which appears on the third screen of the Export Wizard. At that stage, Excel and OLE DB DataSource have a different selection process.

To launch the Export Wizard go to [File tab] Export.

Export Wizard – Introduction screen

Export Wizard		
OrgChart	The Export Wizard will guide you through the process of sending data from your organizational chart to an external data source.	
The second second		
Age)	Do not show this page again < Back Next > Cancel Help	

To complete this screen, choose one of the following options:

- 1. Check the *Do not show this page again* box if you do not wish the introduction screen to appear next time the wizard is launched.
- 2. Next proceed to the next screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Export Wizard – Select export format

This screen offers various export options (see below).

6	Export Wizard	×
OrgChart	In this step choose the destination to where the data will be exported. Note: Depending on your choice, the steps for each export will look a bit different. Microsoft Excel Comma Separated Values (CSV) File Comma Separated Values (CSV) File Cate Microsoft SQL Server Dracle Microsoft Access Microsoft Project Microsoft SharePoint Server	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	

Click a radio button to choose the desired export format.

To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. Next proceed to the next screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Export Wizard – Select export path (CSV, Excel and XML only)

This page appears if CSV, Excel or XML is chosen. It sets the location path to where the document will be exported (see below).

Export Wizard		-
OrgChart	Specify destination to export chart data to. Use "Browse" button or type in destination path manually.	
	C:\OrgChart\Chart 2.xls Browse	
S	< Back Next > Cancel Help	-

The path selection process differs slightly depending on the format type:

Comma Separated Values (CSV) File and XML Document (OrgChart Schema):

- 1. Left mouse click the **Browse** button. The **Browse for Folder** menu appears:
- 2. Use the **Browse for Folder** screen to set a destination folder and click **OK**.
- 3. The export path will be displayed in the **Export Wizard**.

Microsoft Excel File:

1. Left mouse click the **Browse** button. The **Save As** menu will appear (see below):

🔄 Save As						X
Save in:	🔒 OrgChart			• • •	➡ 🖩 🎦	
Recent Places Desktop Adam	Name	Date modif Chart 1_files	Туре	Size	Tags	
Computer	File name: Save as type:	Chart 1 x/s Microsoft Off	ice Excel 5.0-20	03 Files	•	Save Cancel

- 2. Browse to a location and set a file name. Click **Save**.
- 3. The export path will be displayed in the **Export Wizard**.

To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. Next proceed to the Select data source screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

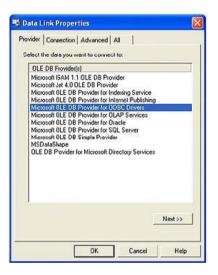
Export Wizard – Data Source screen (OLE DB DataSource only)

This screen appears when **OLE DB DataSource** is selected (see below).

Dig	At this page you ne exported to, and in	ed to choose, how i out the connection (to connect to the dat parameters	asource where the	data wil be
TH V	G Use connection	string			
HA.				· [4]	Build
F				0	
4	C Use Universal D	ata Link (UDL) File			
and and	J				
1					

Choose one of the two following methods to set the DataSource:

- 1. Use connection string
 - a. Choose this radio button and click the **Build** button. The **Data Link Properties** menu will appear (see below).
 - b. Choose the correct OLE DB Providers. If necessary navigate to each area by either clicking **Next** or selecting the appropriate tabs. When all the areas are completed click **OK**.
 - c. The provider will appear in the Use connection string field.



- 2. Use Universal Data Link (UDL) File
 - a. **Click** the **Build** button. The **Open** menu will appear.
 - b. Browse to a location and set a file name. Click **Open**.
 - c. The file will appear in the Use Universal Data Link (UDL) File field.

To complete this screen, choose one of the following options:

- 3. **Back** return to the previous wizard screen.
- 4. Next proceed to the Select data source screen.
- 5. **Cancel** close the wizard without saving and return to the Main Work area.
- 6. **Help** launch the **OrgChart** Help system.

Export Wizard – Select data source screen

This page sets exactly what data is going to be exported (see below).

Export Wizard	
OrgChart	Specify the source data that you want to export. This could be the current chart, the active sheet or just some selected items.
	Current Chart
	C Active Sheet
	C Selection
35	< Back Next > Cancel Help

Choose from one of the following options:

- 1. Active chart exports the entire chart and all additional (hidden) division sub-charts.
- 2. Active sheet exports only the currently displayed sheet.
- 3. **Selection only** exports only the components which are currently highlighted.

To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. Next proceed to the Set data fields screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. Help launch the OrgChart Help system.

Export Wizard – Select data fields

This screen sets which data fields will be exported (see below).

🛃 Export Wizard					×
button their o	step, you will specify the s to choose the data col rder of appearance in the ed Data Views:	umns. U	se the Move Up and		
Availa	ble columns:			Output columns:	
	hone Office -Mail Office leadcount eam Budget		Add -> Add all <- Remove Remove all	R Name ☐ Title ☐ Note	
Sł	now System Columns			Move Up	Move Down
		<	Back Next	> Cancel	Help

Data fields are chosen by making selections from the **Available columns** pane and transferring them to the **Output columns** pane.

To move items between panes simply highlight a selection and use the appropriate button. The following options are available:

- 1. Add moves a selection from the Available columns pane to the Output columns pane.
- 2. Add all moves all the selections from the Available columns pane to the Output columns pane.
- 3. **Remove** moves a selection from the **Output columns** pane to the **Available columns** pane.
- 4. **Remove all** moves all the selections from the **Output columns** pane to the **Available columns** pane.

The following options are available in the **Output columns** pane only:

- 1. **Move Up** moves an item higher on the list. This option is inactive if the selection is already at the top.
- 2. **Move Down** moves an item lower on the list. This option is inactive if the selection is already at the bottom.

To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. Next proceed to the next wizard screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Export Wizard - Select data set title

This page sets the data set title for your exported document (see below).

Export Wizard	
OrgChart	At this step of export wizard specify the title of the data set. This is the name of the worksheet for Excel, or a Table name when exporting to a database.
	Data set title: Chart_1
	Note: Data set title may contain only alpha or numeric characters.
	< Back Next > Cancel Help

To use, simply type the title into the **Data set title** field.

Note: a title can only contain either letters or numbers – it cannot contain both. In addition, no spaces or wildcard symbols (asterisks, etc.) are allowed. To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. Next proceed to the Progress indicator screen.
- 3. **Cancel** close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Export Wizard – Progress screen

This screen activates automatically after the previous wizard screen is completed. This page reports the progress of your export (see below).

Export Wizard		×
OrgChart	The Wizard is providing you with progress information	
	Progress report:	
161	Wizard controller reports no errors Wizard processor is ready to be executed	*
		~
	< Back Next > Cancel	Help

IMPORTANT: export time is dependent upon the complexity of the chart. If the chart is simple and the indicator does not update in a few seconds, or you believe that the progress indicator is stuck, simply click **Next** to proceed to the final screen.

To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. Next proceed to the *Results* screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart Help system.

Export Wizard – Results screen

This screen displays the results of your export (see below).

🔀 Export Wizard		X
OrgChart	The Wizard is providing you with progress information Progress report: Wizard controller reports no errors Wizard processor is ready to be executed Processing data Success	•
	< Back Finish Cancel	Help

The following areas and options are present on this page:

- 1. **Results report** displays the results of your export.
- 2. **Errors report** displays any errors that may have occurred during the export process.
- 3. **Details** click this button for any additional information which may be available regarding the export of your document.

To complete this screen, choose one of the following options:

- 1. **Finish** complete the wizard and return to the Main Work area.
- 2. **Cancel** close the wizard and return to the Main Work area.
- 3. **Help** launch the OrgChart Help system.

Reports

Reports are pragmatic, graphically simple reports usually produced for in-house informational purposes.

ج - 😭 ᢏ 😭 🖌 🗑		123	OrgChar	t 9 - Actual v9 Cornerstone 3.toc
FILE HOME GROUPING INSERT	PAGE LAYOUT DATA DE	SIGN VIEW HELP		
Resync Data		· · · · · · · · · · · · · · · · · · ·		8 🌲 🗐 📝 🔀
Import Chart Automation Data Set	Manage Conditional Markers Rules Formatting	Reports Fast Dynamic Reports Reports	Export Export Compare Com Wizard Summary Fields Tool to A	
Import & Configuration	Rules	Analyze	Export Compare	Track Changes

There are three options for reporting:

- 1. Simple tabular reports Simple, canned reports
- 2. Custom 'Fast Reports' Customizable reports (fairly complicated)
- 3. Dynamic Reports Flexible reports that can be quickly designed

Dynamic Reposts are recommended for most reporting needs.

1. Simple Tabular Reports

To create a **Report**:

1. Go to the **Data** tab and click on **Reports**. The **Report** wizard will appear (see below).

OrgChart Professional with other formats

Report	×
The report function will allow you to output any of the data contained in the OrgChart Profession can create new report formats and afterwards save them. Choose from existing "Existing Repo if you are just starting.	
Where you have an existing report, the "Fields Selected For The Report" and "Criteria To Filter in view.	Report Data'' will be
Existing Reports:	
OrgChart Report 1 - Chart 1 OrgChart Report 2 - Chart 1	New
	E dit
	Delete
	Printer Setup
Fields Selected For The Report:	View Report
	Export to Excel
Criteria To Filter Report Data:	
A	Close
*	Help

- 2. On the **Existing Reports** page, click **New**.
- 3. The **Report Name** page will appear (see below).

OrgChart Professional with other formats

8	Report	×
	Enter or edit the name of the report. The report name you enter will appear as the title for the report." Based on:" refers to the chart whose data you wish to present.	
	Report Name:	
	Report	
	Based on:	
	Chart 1	
_		
	< Back Next > Cancel He	p

- 4. Enter a new title in the **Report Name** field and click **Next**.
- 5. The Report columns page will be displayed (see below).

Defined Data Views:				
Available columns:			Output columns:	–
D ivision	*	Add ->	Name	
		Add all	Title	
∑ WBS Code			Note 📄 Note	
Phone Office	=	<- Remove	1	
E-Mail Office		Remove all	1	
Σ Team Budget		Homovo di	1	
§ Salary				
1 Load	-		Move Up	Move Down

6. On this screen, choose which column fields you want (and don't want) by highlighting topics and clicking the arrow symbols. Click **Next**.

7. The *Report Criteria* page is displayed (see below):

	he report, simply click on "Finish".		
Logic	Criterion	Case Sensitive	Add
	Any Field Contains OrgChart Professional		E dit
			Remove
			Change Logic
			Clear All

If you don't want any additional criteria, click Finish to return to the main wizard page.

If you want to add criteria, click the Add button. This will launch the Edit report criteria box (shown below).

🛃 Edit report	criteria	X
Find what:	OrgChart Professional	OK
Find where:	Any Field	Close
Comparison:	Contains	
n Match cas	e Search scope: C Selection C Entire Chart	
	C Current Division	Help

This is search/find function will search your chart and place the returned results into your report. Fill in the fields and click **OK**.

8. The *Report Criteria* page will reappear. Notice that your newly created report is listed in the **Existing Reports** window.

- 9. Highlight a report in the **Existing Reports** window (*Note*: the **View Report** button will remain inactive grayed out if a report is not highlighted).
- 10. Click the **View Report** button.
- 11. Your report will be generated.

Viewing, printing and exporting Reports

All Report viewing, printing and exporting commands are accessed through the *Reports – Report Viewer*.

To view Reports:

- 1. Highlight the report's name in the **Existing Reports** window and click the **View Report** button:
- 2. The report will be automatically displayed in the *Reports Report Viewer* (see below).

CrgChar	t Professional - [OrgChart2]		
Print	Next Page Prev Page Two	Page Zoom In Zoom Out	Close
			A
			Report
Nam	e	Title	Photo
2	OrgChart	Title>	<pre>(ii) <photo></photo></pre>
2	OrgChart	Title>	<pre>(@ <photo></photo></pre>
2	Org Chart	Title>	<pre>(@ <photo></photo></pre>
2	OrgChart	Title>	(i) <photo></photo>
2	OrgChart	Title>	<pre>(@ <photo></photo></pre>
2	Org Chart	Title>	<pre>(i) <photo></photo></pre>
2	Org Chart	📄 <title></th><th><pre>(@ <Photo></pre></th></tr><tr><th>2</th><th>Org Chart</th><th>Title></th><th><pre>(@ <Photo></pre></th></tr><tr><th>2</th><th>Org Chart</th><th>Title></th><th>(iii) <Photo></th></tr><tr><th>2</th><th>OrgChart</th><th>Title></th><th><pre>(iii) <Photo></pre></th></tr><tr><th>2</th><th>OrgChart</th><th>Title></th><th><pre>(@) <Photo></pre></th></tr><tr><th>2</th><th>OrgChart</th><th>Title></th><th>(∂) <Photo> ▼</th></tr><tr><th>•</th><th></th><th></th><th>4</th></tr><tr><th>Page 2</th><th>Chart Normal View</th><th>Outine Pane Mode: All records</th><th>Persons in chart: 60</th></tr></tbody></table></title>	

To access all printing options in the Report Viewer:

1. Left mouse click the **Report** button in the top left corner of the *Report Viewer*. A list of options will appear (see below).

Report	
Print	
Print Setup	
Print Preview	_
Export 🕨	Excel
Close	1

- 2. Choose from the following printing options:
 - a. **Print** launches the standard Microsoft Windows Print interface.
 - b. **Print Setup** launches the standard Microsoft Windows Print Properties interface.
 - c. **Print Preview** launches the OrgChart Professional *Print Preview* screen (for more details, please see the *Print Preview* section).

(Note: Print, Print Setup and Print Preview follow all standard printing conventions outlined in Chapter 3: Printing.)

To export a Report from the Report Viewer:

- 1. Left mouse click the **Report** button in the top left corner of the Report Viewer. A list of options will appear (see above).
- 2. Choose **Export** > **Excel**.

2. Fast Reports

Fast Reports are highly customizable but getting assistance from support is highly recommended.

Contact support@officeworksoftware.com

Go to the Fast Reports icon on the Data tab. Start the publish wizard.

1	Publish Wizard	×
	Select the source content to publish from.	
OrgChart	Ohart Content: Oument Qhart Active Sheet Selection Division and below	
	< Back Next > Can	cel

Next.

1	Publish Wizard	×
	Select the source content to publish from.	
OrgChart	Current Qhart Active Sheet Division and below Select available rule or create by pressing "Manage" button. Donot use rules when creating report Leaving After 2015 III Load settings	tanage
	< Back Next >	Cancel

Next

Select the report template.

OrgChart Professional with other formats

6	Publish Wizard	×
	From the list of "Available templates" choose a pre-set report template. See the "C template" description to determine the number of available data fields and availab fields for the template you have chosen. Please note that these values are different template.	e parameter
	Available templates:	
	Employee list with photos Standard Employee Directory with photos	Create new
7/	Simple table	Edit
IN	Custom Table	Delete
	Template description	
OrgChart	Employees list, contains the employee photo and general information	~
	< Back Next >	Cancel

Next

Map fields from data source to the template.

7	Available chart columns:		Template Data Source a	and Fields
	123 Position ID abc Department 123 Decision_Maker B Date_of_Hire abc_src_IsAssistant Output columns:	•	Employees abc Address abc HomePhone abc Note abc Supervisor	v Militaria V
OrgChart	Data Column Employee Name abc Title Photo	Mapped I abc Name abc Title		<- <u>A</u> dd <u>R</u> emove -> Remove all

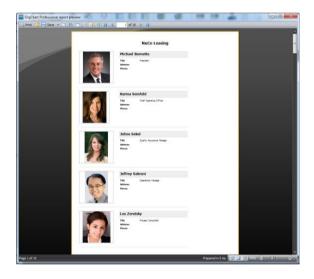
Next

Add a title to the report.

OrgChart Professional with other formats

	Specify the report parameters by	entering the data in	ito the Value colu	umn	
7	<u>Available template parameters:</u>				
	Name	Val	lue		
	Title	NuC	Co Leasing		
IN					
2					
'CV]					
T					
OrgChart	Save report settings on press	ing "Next"		S	ave As
	·				
			< <u>B</u> ack	Next >	Cance

Finally the report is created.

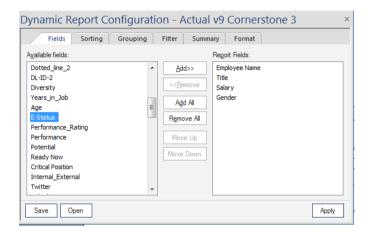


If desired the report template can be modified to you needs. The OfficeWork support group can advise you.

3. Dynamic Reports

Dynamic reports give a lot of flexibility and can be configured on-the-fly.

Click on Dynamic Reports, click on the Fields tab and select (Add) the data fields needed for your report.



Go to the sorting tab. Sort by Gender and Title.

Fields Sorti	ng Grouping	Filter	Summary	Format	
vailable <u>f</u> ields:			S	ort by fields:	
Employee Name Salary		Add	Ju /	+ [†] Gender + [†] Title	
Save Open		Move	Down	Sort Order:	Apply

Select the Grouping tab. Select Gender and click on Add Group. Then select Title and click on Add Group. (This will cause the report to be grouped by Gender first, and then Title within the Gender groups.

Dynamic Report Configuration - Actual v9 Cornerston	e 3	×
Fields Sorting Grouping Filter Summary Format		
Report L_Gender	Add Group	
Title	Remove Group]
Salary	Move <u>U</u> p]
	Move <u>D</u> own]
Save Open	Apply]

If you want to limit the records you are reporting use the filter tab. Otherwise proceed to the Summary tab.

Click 'Count' for each of Report, Gender and Title.

Dynamic Report Configuration -	Actual v9 Cornerstone 3 ×
Fields Sorting Grouping Filte	Summary Format
Summary for:	Selected Fields:
-Report └ Gender └ Title	Count
 ⊖Sum ⊖Min ⊙Count	Show: • Detail and Summary
Average Max	Summary Only
Save Open	Apply

Go to the Format tab. Select desired report shading and title (Header)

Dynamic Report Configuration - Actual v	9 Cornerstone 3
Report tem Style Report Body Group Tetals Report Tetal Report Te	Report Attributes Even row fill color: Odd row fill color: Qisplay Grid Lines Header: NuCol Footer: No Foo Margins (in inches) Left: 0.39 Top: 0.39
Save Open	Apply

Click on Apply.

View the report in the report pane on the right side of the screen. If this is not visible go to the View tab and click on the Report checkbox.

FILE	HON	ME G	ROUPING INST	PAGE LAYOUT	DATA DESIGN	VIEW H	ELP						
Normal	Print Layout Views	Master Page	 Designer Data and Divisions Position Detail 		 Show Grid Show Rules Show Status Bar 	📓 Reset Layout	Levels	Q 100%	Q Zoom In	Q Zoom Out Zoom	Fit to Window *	Full Screen W	🗗 Windows 🔻

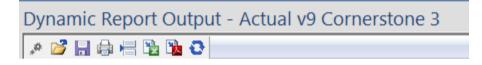
The report should now be visible.

e 💕 🔛 🤅) ++ B_ B_ C				
NuCo L	easing				
Gender	Title	Employee Name	Title	Salary	Gender
	Administrative clerk				
	Addition of the Cont	Kim Sung Lee	Administrative derk	\$150,000.00	
	Intern	nen oor g coo	Harris and Gold	4100/000100	
		Janie Mumford	Intern	\$150,000.00	F
	Manager - Cloud Apps				
		Rhonda Gasser	Manager - Cloud Apps	\$55,000.00	F
	Manager - Desktop Apps		- and - and - the		
		Tine Fritcher	Manager - Desktop Apps	\$55,000.00	F
	Pricing Analyst				
		Sandy Frader	Pricing Analyst	\$55,000.00	P.
	Process Consultant				
		Lee Zeretsky	Process Consultant	\$65,000.00	F
	Product Designer				
		Nadia Garcia	Product Designer	\$300,000.00	F
	QA Tech				
		Marcy Chang	QA Tech	\$65,000.00	P.
		Donna Schultz	QA Tech	\$65,000.00	
		Terry Brown	QA Tech	\$65,000.00	P
	QC Tech				
		Eddie Haskell	QC Tech	\$65,000.00	
		Norma Lear	QC Tech	\$65,000.00	
		Sophia Sanchez	QC Tech	\$65,000.00	
		Ludwid Ahsato	QC Tech	\$65,000.00	
		Dudley Hall	QC Tech	\$65,000.00	F
	Sr VP of Engineering				
		Allison O'Toole	Sr VP of Engineering	\$150,000.00	۴
	Systems Architect				
		Ben Greenberg	Systems Architect	\$300,000.00	P
FTotal				\$1,800,000.00	
F Count: 17					
	Advanced Engineering				
	Asvances Engineering	Steve Luning	Advanced Engineering	\$55,000.00	
	Assistant Manager	siere comy	Autorities crighteering	\$33,000.00	-
	Assistant Manager	OPEN	Assistant Manager	\$300.000.00	
	Chief Operating Officer	CFCH	Post of a real style	4.000,000.000	
	cher operang entes	Karina Seinfeld	Chief Operating Officer	\$150,000.00	M
	Consultant	the second se	cher operany erred	4100,000.00	
		Ash Gorakpirala	Consultant	\$55,000.00	м
	Design Manager	and and anget and			
		Lou Gaglardi	Design Manager	\$55,000.00	м
		Rob Nance	Design Manager	\$75,000.00	
		David Wilelanti	Design Manager	\$150.000.00	
	Derinner				

Change the fields, filter or any criteria and re-apply the settings. The report will quickly refresh. In addition the report is sensitive to the selected scope of the org chart. By selecting a person you will see their detail and everyone in their organization. If you select the top of the hierarchy, or do not select any box, the report will include all records in the chart's database.

Note that when any of the data in the chart's boxes is changed the report will also change in response.

The report pane also shows options for saving settings, opening a preconfigured set of settings, printing and export to excel and PDF.



Appendix A: Interfaces

This chapter details OrgChart's interfaces, control panels and modes.

Attachments – File Attachment Data Menu

This menu enables you to attach files to components.

🛃 File Attachme	nt Data	X
Display name	OrgChart Information.txt	Save As
Initial file path	C:\OrgChart\OrgChart Information.txt	Browse
	View	Clear data
	OK Cancel	Help

The File Attachment Data menu can be opened in the following ways:

- 1. **Box Item** double click *File Resume*, or any custom designed data field with an *Attachment* attribute.
- 2. Data Outline Pane
 - a. **If no attachments are associated with the component** double click *File Resume*, or any custom designed data field with an Attachment attribute.
 - b. **If attachments are already associated with the component** double click the cell containing the name of the attachment.
 - c. **On-screen component** double click any visible data field with an *Attachment* attribute. *Note: if none are visible, go to the Box Item menu, choose a data field with an Attachment attribute (i.e. File Resume, etc.) and click in the visibility column (for more details, see Box Item menu).*

Attaching Files

To make attachments in the File Attachment Data menu:

1. **Browse to the file** using the **Browse** button. When the **Open** box appears, browse to the desired file and choose it by either double clicking the file or highlighting it and clicking **Open**.

Note: once an attachment is chosen, an icon representing the file type will appear in the lower left area of the menu (see the above illustration).

- 2. Name the attachment. The name appearing in the **Display name** field is the name that will appear in the on-screen component. Names can be created in the following ways:
 - a. **Customize the attachment name** type a new name into the **Display name** field to replace the file's original name, then click **OK** or hit the **Enter** key.
 - b. Use the attachment's original name (no modification) a file's original name is automatically placed in the **Display name** field when it is chosen. To keep this name simply click **OK** or hit the **Enter** key.
- 3. Complete the process. Select one of the following options:
 - a. **OK** accepts your choice and inserts it into the chart.
 - b. **View** opens the file for viewing. *Note: the View button will be inactive (grayed out) if the attachment is empty (such as a text file with no text).*
 - c. **Save As** allows you to save the attachment in a new location and with a new name.
 - d. Clear data clears all fields and resets the menu defaults.
 - e. **Help** launches the Help menu.
 - f. **Cancel** closes the panel without saving any data.

OrgChart Professional Interfaces

Border Style

This menu enables you to control the following: Line Style, Line Width, Fill Style, Join Style and Transparency. *Note: a border must be present on the chart or the Border Style menu will be inactive (grayed out).*

	Border Style	:
Line Style	Eil Style	Apply To: • Selection Entire Chart Current Division Division and below
	<u>D</u> K <u>C</u> ancel	Apply Help

Accessing the Border Style menu

- 1. Select the current chart's border (see Selecting Borders for details).
- 2. Access a **Border Style** menu right click in the chart to launch a pop– up menu. When the menu appears, go to **Format > Border Style**.

The following options are available:

- a. Line Style a list of solid and dotted line styles.
- b. Fill Style this launches the Line Fill Style palette.
- c. **Line Width** this determines line thickness. Sizes can be chosen from the list or typed in manually.
- d. Join Style this drop down menu provides three corner styles.
- e. **Transparency** this button toggles the line between complete opacity (0, 0) to complete transparency (255, 255).
- f. **Preview** this window allows you to see your choice before committing it to the on– screen component.
- g. **Help** this launches OrgChart **Help**.

- 3. To complete the process, you must select one of the following options:
 - a. **OK** applies and saves your choices then closes the panel.
 - b. **Cancel** closes the panel without saving the changes.

Box Item Menu

Dynamic in nature, this menu displays the Data Fields for any currently selected component. (*Note: the Box Item menu will only become active after an on screen component has been selected*.)

[Box Item	~	×
¢	All Columns		Ŧ
	Name	Executive	
	Title	[Title]	
	Division	Chart 1	
	Supervisor	Board of	
	WBS Code	1.1	
	Photo	[Photo]	
	Phone	[Phone]	
	eMail	[eMail]	
	Headcount	4	

Hiding and revealing Box Item

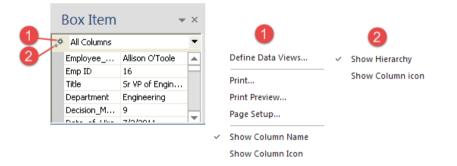
- 1. Go to the **View tab** and click on **Box Item**.
- 2. The **Box Item** menu will toggle in and out of view accordingly. (*Note: a check mark next to the item's name will indicate if it is hidden or visible.*)

Data Fields information types found within Box Item

- 1. **Text** text information can be typed directly (or cut and pasted) into these fields.
- 2. **Salary** single click this field to make dynamic, on-the-fly calculations of budgets and expenditures. It is used in conjunction with the *Headcount* and *Team Budget* fields.
- 3. Link double clicking this field launches a new interface for link creation.
- 4. Image stored images are linked to a component through this field.
- 5. Attachment stored information files are linked to a component through this field.

Box Item Options button

Two options show on the Box Item view.

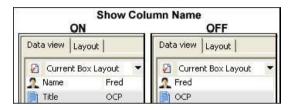


1. **Options button on the Data View tab** – affects primarily the Box Item work space and data. Most of the options launch either another screen, or another dialogue to help organize, print or export the data itself.

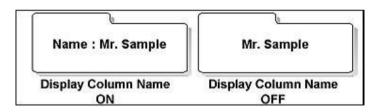
Options available from this drop down menu:

a. Edit Chart Data Set – launches the Chart Data Set menu. The Chart Data Set interface sets global changes which can affect every component if you so choose. From this menu you can: a) create new data fields, b) load predefined fields, 3) edit fields, 4) rearrange the order in which fields appear and 5) delete existing fields.

- b. Edit Current Data View launches the Edit Data View menu. This interface is used to define and edit data views currently available in the Current Box Layout drop down menu directly to the right of the Options button.
- c. **Show Column Name** toggles between displaying and hiding the data field titles in the Box Item area.



- Options button on the Layout tab These affect only on– chart components. The following is a list of options available from this drop down menu:
 - a. **Display Column Name** toggles between displaying and hiding the data field titles in the on-chart component (see below):



Note: this affects each data field independently, so one field could be set to Display Column Name "on", while another data field in the same component could be set to have this option toggled off.

- b. Align Left aligns the text of the on– chart component to the left.
- c. Align Center centers the text of the on– chart component.
- d. Align Right aligns the text of the on– chart component to the right.
- e. **Font Style** launches the **Font Style** menu. This interface provides a range of choices on how the text inside a component will appear.

Displaying a picture in Box Item window

In addition to displaying text or numerical information, images and pictures can now be displayed in the **Box Item** window (see below):



This tool is great for browsing personnel photos or having instant access to any other visual data you may wish to have associated with a component.

To display a picture in the **Box Item** window:

- 1. Click on a component in your chart to activate the **Box Item** window.
- 2. In the **Box Item** window, make certain the data view you have chosen contains the Photo data field. (*For more information on editing and choosing data views, please see the Current Box Layout section.*)
- 3. **Click** on the Photo data field. The field will turn gray and a button will appear.



4. Click the small button, this will launch the **Image Data** box (see below)



- 5. Click the Browse button and navigate to the location of the image you wish to display.
- 6. Select the image and click **OK**.
- 7. The image will now appear in the *Preview Pane* of the **Image Data** box.
- 8. Select the **Display Size** from the drop down menu and click **OK**.
- 9. The image will appear in the **Box Item** window.

Box Properties Window

Components can contain vast amounts of information that can be edited, exported and printed. An important area for the manipulation of this information is the **Box Properties** window. (*This area has two tabs. The image below shows the* **Box Properties** menu with the **Edit Data** tab selected).

Name	Data Sample Component
🤦 Name 🗎 Title	Sample Component
Company	OrgChart
Company On Photo	Orgenalt
Division	Chart 1
	<none></none>
WBS Code	0
Phone Office	
E-Mail Office	
E Headcount	1
Σ Team Budget	\$0.00
\$ Salary	\$0.00
	,
Apply To:	Entire Chart C Current Division

Displaying the Box Properties window

- 1. Go to **Shape > Properties**.
- 2. Double click an empty area inside a component (an area with no text or graphics, etc.).
- 3. Right click a component to launch a pop– up menu. In the pop-up menu choose **Properties**.
- 4. Use the hotkey combination of **Alt+Enter**.

Box Properties: Scope

Scope is a powerful and intuitive interface which allows you to quickly set the range and locations of the data changes in your chart. It is found in the **Apply To** section at the bottom of both **Box Properties** tabs. It has the following options:

Apply To:	C Entire Chart	C Current Division	
-			

- 1. **Selection** only applies changes to the currently selected component(s).
- 2. Entire Chart applies changes to every component in the chart.
- 3. Active Division only applies the changes to the division of the currently selected component.

Scope can be applied to any data field, in any combination, anywhere on the chart. This means that you can set certain fields, like the company's name or telephone number, to appear in every component in the division or chart, but leave all the other data fields unaffected. Since you can have any data (or field) appear anywhere, the possibilities and time saving features of scope are almost limitless.

Box Properties: Edit Data

This tab is used to define what data will be associated with certain component(s). To use this section:

- 1. Click in the right hand column of the data field you want to edit. The area will turn blue.
- 2. Enter the data.
- 3. Press **Enter** or click in another field to apply the data.
- 4. Set the scope of the changes by going to the **Apply To** area and clicking one of the available choices.
- 5. Click the **OK** button to apply the changes and close the menu.

Box Properties: Define Layout

This tab determines the visual appearance the data in the component. It determines what is visible and where (see below):

This tab consists of the following areas:

- 1. **Data Fields area** displays what data fields are available (this changes depending on what data view you have chosen). It contains the following:
 - a. Data field names in the left column.
 - b. Visibility box in the right column. Check this box to toggle the selected field between being visible and hidden.

- 2. **Preview Pane** displays a simple diagram of the component. It shows:
 - a. Data fields that will be visible to change this, check or uncheck the *visibility box* in the Data Fields area.
 - b. Order of the data fields to change the order, highlight the desired field in the Data Fields area, then click the Move Up or Move Down buttons. (Note: The Move Up and Move Down buttons will only become active if a data field with a check in the visibility box is selected. These buttons will also either activate or deactivate depending upon which data field is selected.)
 - c. Component text font this is selected in the Display Properties area (see below).
 - d. Component text alignment this is selected in the Display Properties area (see below).
- 3. **Display Properties area** determines certain visual properties of the component. It contains the following:
 - a. Display Column Name check this box to make the title of the data field appear in the component (for example, with the box checked a person named "Mr. Sample" would appear in the component as "Title: Mr. Sample".)
 - b. Text alignment buttons click any of the three buttons to determine if the text will be aligned on the left, center or right of the component.
 - c. Font Style click this button to open the font menu (for more details, please see the *Font Style* section of this manual).
- 4. **Apply To area** determines the scope of the changes which have been determined in the other areas (for more details, please see the *Box Properties: Scope* and *Apply Scope* sections of this manual).

Once you have made your selections from the above sections, click the **OK** button to apply the changes and close the menu.

Calculated Field – Headcount and Team Budget

This menu allows the automatic tallying of personnel, salaries and team budgets. It is applied to a parent component to track its subordinates. The scope can be set to branches, managers and subordinates (see below):

Calculated Field								x
Operation Sum	•	Affected Col Team Budge		•	Affected Sc Branch and	·		•
			ОК		Cancel		Help	

Accessing the Calculated Fields menu

- 1. Go to Box Item.
- 2. Double click one of the following data fields:
 - a. Headcounts
 - b. Team Budget
- 3. The Calculated Field menu will appear.

OrgChart Professional Interfaces

The following screen shows a parent component with *Headcount* and *Team Budget* applied. (*Salary* is also present since it is integral to calculating *Team Budget*. For more information on using *Salary*, see *Data Field – information types – Salary*).

Box Item Salary Planning Name Title Salary Total Salaries Headcount	Supervisor Manager \$0.00 \$10.00 3	- N	upervisor lanager eadcount : otal Salarie		0.00	0
			Employe Headcour Salary : \$	nt : 2		
			Employe Headcou Salary : \$	nt : 1		

Performing Headcounts

To perform Headcounts, chose the following settings for each corresponding field:

- 1. **Operations** field Count
- 2. Affected Data field Headcount

Note: this field is inaccessible (grayed out) when **Count** is selected in the **Operations** area. To make changes in the **Affected Data** field:

- a. Choose **Sum** in the **Operations** area. This will make the **Affected Data** field active.
- b. Choose an option in the Affected Data field.
- c. Go to any other field and make any selection.
- 3. Affected Scope any setting may be applied. Default settings of Branch and Mgr. appear when the Headcounts field is double clicked. Under other circumstances, the settings may have to be manually selected.

The following options are available in each area:

- 1. **Operation** -1) Sum and 2) Count.
- 2. Affected Data Field 1) Headcount, 2) Salary and 3) Team Budget.
- 3. Affected Scope 1) Branch and Mgr., 2) Branch Excl. Mgr., 3) Direct Subordinates and 4) Mgr., Direct Subordinates Excl. Mgr.

Performing Team Budget

Team Budget is calculated from the Headcount and Salary fields of a parent component and its subordinates. As a result, a number must be entered into at least one component's Salary field or the Team Budget will be zero.

To perform a **Team Budget**, do the following:

- 1. In **Box Item**, double click **Team Budget**.
- 2. Make sure that Calculated Fields is set as followed:
 - a. **Operations** field Sum
 - b. Affected Data field Salary
 - c. Affected Scope any setting may be applied (the default is Branch and Mgr.). (These settings appear when the Team Budget field is double clicked. Under other circumstances, the settings may have to be manually selected).
- 3. Make certain a number is entered in at least one component's Salary field.
- 4. Highlight the parent component.
- 5. The Team Budget for the parent component and all its subordinates will be displayed.

To complete the **Calculated Fields** menu, select one of the following options:

- 1. **OK** accepts and saves your choices and closes the panel.
- 2. **Cancel** closes the panel without saving the changes.

Chart Data Set

In addition to the default Data Fields in the **Box Properties** menu, new fields can be created, modified or deleted globally through the **Chart Data Set** window (see below):

Name	Туре	Visible	Display name	Formula	Format	New
Name	🧟 Name	\checkmark			0 .00	
Title	Text	✓				Add Predefined
Company	Text	✓				Delete
Photo	🔞 Image					Delete
Division	S Calculated			Σ		Set Title
Supervisor	💻 Supervisor			Σ Σ Σ		
WBS Code	S Calculated			Σ		
Phone Office	Text					
E-Mail Office	🌐 Link		v			Move Up
Headcount	S Calculated			Σ		Move Down
Team Budget	S Calculated			Σ		Move Down
Salary	\$ Currency	Y	✓		⁶⁰	
						ОК
						Cancel
						Help

IMPORTANT: **Chart Data Set** stores and creates data fields that can become available to every component (globally). However, although these fields are available, they are not automatically included or visible in the final component. After you set the data field to be accessible and visible, it will be available for the chart building process.

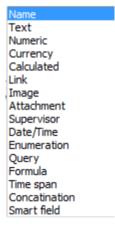
OrgChart Professional Interfaces

To access the Chart Data Set interface: Go to Data tab, to Chart Data Set.

Editing an existing data field:

There are five fields which can be edited in the **Chart Data Set**:

- 1. **Name** to edit this field, do the following:
 - a. Click on the Name column of the chosen data field. The area will turn blue, signifying that it is now editable.
 - b. Enter the new information.
 - c. Press **Enter**, or click in another data field and the information will be applied.
- 2. **Type** there are various types of data fields available to you:



To edit this field, do the following:

- a. Click on the **Type** column of the chosen data field. The field will turn blue and a button will appear on the right side.
- b. Click the button to open a drop down menu displaying the nine types of fields listed above.
- c. Click on your choice in the drop down menu.
- d. The selection will now appear in the **Type** field.

- 3. **Visible** determines whether the data field will be visible. Check this box to toggle between visible and hidden.
- 4. Display Name determines whether the title of the data field (such as Name, Title, Photo, etc.) will appear in the component. (For example, in a component with a person named "Mr. Sample", the name will appear as "Title: Mr. Sample" if Display Name is checked.) Check this box to toggle the data field title between visible and hidden.
- 5. **Formula** formulas are only available if certain types of data field were selected in the Type column (i.e. numeric, currency, calculated, etc.). To edit this field:
 - a. Click on the **Formula** column of the chosen data field. The field will turn blue and a button will appear on the right side.
 - b. Click the button to open a drop down menu displaying the **Calculated Field** menu (see below):

Calculated Field						×
Operation Sum	•	Affected Column Team Budget		•	Affected Scope Branch and Mgr.	•
			ОК		Cancel	Help

- c. Choose options from the drop down menus in the **Operation**, **Affected Column** and **Affected Scope** fields, then click **OK**.
- d. The **Calculated Field** menu will close and your selection will now appear in the **Formula** area of the **Chart Data Set**.

To create a new data field:

- 1. Click the **New** button. The **Name** column will turn blue and a new entry entitled "Unnamed" will appear.
- 2. Type in a name for your new data field, then either hit **Enter** or click in another field to apply the change.

- 3. Choose your options from the **Type**, **Visible**, **Display Name** and **Formula** areas.
- 4. When you are done editing the data sets, click **OK** to close the interface.
- 5. The Add Columns in Data Views menu will open. This window provides the option to add your newly created data field to already existing Defined Data Views (see below):

Add Columns in Data Views		X
New Data Columns:	Defined Data Views:	
OrgChart Data Field Example	Default Salary Planning Phone Directory	
C	Cancel	Help

To add your new field to an existing Defined Data View:

- 1. Check the box next to the views you want your new field to appear in.
- 2. Click OK.
- 3. The window will close and you will be returned to the main work area. (From this point on, whenever any of the views you checked is chosen in the Box Item: Current Box Layout or Outline View: Data View Quick Selector menus, your new data field will appear with the other data fields.)

To load a predefined data field:

OrgChart comes with a library of predefined data fields. To load fields from this library:

- 1. Click the **Add Predefined** button.
- 2. The Add Data Fields menu will appear (see below):

₿	Add Predefined	Columns	×
	ny ration Title ode unt Control Span of Control e Span of Control above	 ∑ Current lev \$ Salary 123 Load ? E-Mail Office Photo ? File Resum ? Business For abc Location abc Location abc Address abc City abc State abc Zip abc Country 	e
<			>
	Ado	i <u>C</u> lo:	se

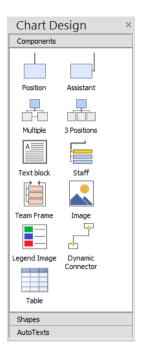
- 3. Highlight the data field you wish to add and click the **Add** button.
- 4. The **Add Data Fields** window will disappear and your selected, predefined data field will appear in the **Chart Data Set** area.

Additional Chart Data Set buttons:

- 1. **Delete** removes a data field from the **Chart Data Set** area. To use, simply highlight the field you wish to remove and press **Delete**.
- 2. Set Title sets the currently chosen data field as a title. If the currently highlighted field has already been set through this option, the button will automatically switch to **Remove Title**.
- 3. **Move Up** moves an item higher on the list. This option is inactive if the selection is already at the top.
- 4. **Move Down** moves an item lower on the list. This option is inactive if the selection is already at the bottom.
- 5. To complete the **Chart Data Set** process, choose from the following:
 - a. **OK** accepts your choices and applies them universally to the data fields of every component.
 - b. **Cancel** closes the panel without making any changes.
 - c. **Help** launches the Help menu.

OrgChart Professional Interfaces

Chart Design Palette



The Chart Design Palette contains the following seven expandable areas:

- 1. **Themes** visual motifs which affect the appearance of the chart, applied components and certain menu views.
- 2. **Backgrounds** patterns appearing only on the chart (without affecting components).
- 3. Borders designs which appear only along the outer edges of the chart.
- 4. **Shapes** styles that modify a component's shape. *IMPORTANT: a shape can only be applied to components that are already present on the chart.*
- 5. **Components** the building blocks of a chart. Components can be moved, linked, hidden and resized. By default, they display an entry's Name and Title but can show an almost infinite range of information.
- 6. AutoTexts boxes which contain text and information which can be automatically applied to the chart and customized.

Note: Information inside an **AutoText** *box can only be changed from the Divisions View.*

To change text in an **AutoText** box, do the following:

- a. Place an AutoText on the Chart.
- b. Open up **Divisions View**.
- c. In **Division View**, highlight the name of the level the **AutoText** is on. The level will have a default name such as Chart, Division 1, Division 2, etc.
- d. Press the **F2** key to make the default **Division** name editable.
- e. Input the text you wish to appear in the AutoText.
- f. Click **Enter** to apply the change.
- 7. **Clipart** graphics and images designed to be inserted into charts to visually enhance your presentations. **OrgChart** comes with a pre– installed library of images. Users may also import images from almost any source.

Connector Style

This controls the appearance of a component's connector and of Dynamic Connectors. From here you can control: Line Style, Line Width, Join Style, Fill Style, and how a connector starts and ends (i.e. with an arrow, plain, etc.).

Line Style Line Style Line Width 1.0 Transparency start: 100 %, end: 100 % Ioggle Preview:	Connector Style Fill Style Line Join Starts with Ends with	Apply To: • <u>Selection</u> • Entire Chart • Current <u>D</u> ivision • Division and <u>b</u> elow
	<u>D</u> K <u>C</u> ancel	Apply Help

Important:

- 1. You cannot directly select the connector between two components (if you wish to edit it). Instead, you must select one of the components and then bring up the **Connector Style** menu.
- 2. An on screen component must be selected or the **Connector Style** menu will be inactive (grayed out).

Accessing the Connector Style menu

The **Connector Style** menu can be accessed in two ways:

- 3. Go to Home tab, Connector Style.
- 4. Right click an on screen component to launch a pop– up menu. When the menu appears, go to **Format** and choose from the expanded list of menus.

Connector Style menu

The following options are available for connector style manipulation:

- 1. Line Style a list of solid and dotted line styles.
- 2. **Fill Style** this launches the **Line Fill Style** palette (a four– tabbed menu which is essentially identical to the **Fill Style** menu. For more details, see *Fill Style*).
- 3. **Start with** a drop down menu of styles to start the connector with. This list includes various arrows, bulges and curved edges.
- 4. End with a drop down menu of styles to end the connector with. This list includes various arrows, bulges and curved edges.
- 5. Line Width this determines how thick a line is. Sizes can be chosen from the list or typed in manually.
- 6. **Join Style** this drop down menu provides a choice of three different corner styles.
- 7. **Transparency** this button toggles the line between complete opacity (0, 0) to complete transparency (255, 255).
- 8. **Preview** this preview window allows you to see your choice before committing it to the on– screen component.
- 9. Help this launches OrgChart Help.

To complete the process, you must select one of the following options:

- 1. **OK** applies and saves your choices then closes the panel.
- 2. **Cancel** closes the panel without saving the changes.

Customize Columns (in Data Outline View)

The Edit Data View panel (see below) allows you to sort, add and delete columns.

Data View <u>N</u> ame:				
Di ^l ectory View				
Available Data Columns:			Selected Data Col	lumns:
123 ID	~	Add ->	abo Name	
			abo Title	
abo _src_IsAssistant		Add all	🥏 Email	
abo Gender			abe Phone	
abo Department		Z Pamaua		
👵 Photo		<- <u>R</u> emove		
\sum Levels above		Remove all		
\sum Levels below				
\sum Current level				
\sum Headcount				
\sum Span of Control	_			
\sum Median Span of Control	~		Move <u>U</u> p	Move <u>D</u> own
		1		

Customize Columns menu

To access this menu, do one of the following:

1. Go to the **View** tab, click **Data and Divisions.** In the outline tool bar select the **Define Data Views** icon.



2. Right click the title bar of any field in the **Data Outline View**, then choose **Edit Current Data View** (see below).

-	Select All
* T 🖽 🖶 🕾 🕹	Locate Person
Name	Replace with this person
- Jim Stein	Delete
😑 Jason Falstaff	f Edit Current Data View
Josh Niche	ols Define Data Views
- Alexander	Griç
- Adrian Kni	ight Print
•	Print Preview
Data View Divisions	s Vier Export
	Properties
	Expand All Ctrl+Shift+X
	Collapse All Shift+Alt+X

Assigning Columns:

- 1. **To add columns** choose items from the **Available Data Columns** pane on the left and click the **Add** button.
- 2. To remove columns choose items from the Selected Data Columns pane on the right and click the **Remove** button.

Arranging Columns – highlight an item in the **Selected Data Columns** pane, then click:

- 1. **Move Up** moves an item higher on the list. This option is inactive if the selection is already at the top.
- 2. **Move Down** moves an item lower on the list. This option is inactive if the selection is already at the bottom.

Data Link Properties Screen

When importing OLE DB DataSource, the **Data Link Properties** screen is used to choose the database provider, test the connection, set access permissions and specify many other important settings.

To access the Data Link Properties page:

- 1. Go to the **File** tab, **Import** to launch the Import Wizard.
- 2. Click **Next** on the Introduction screen.
- 3. Choose OLE DB DataSource as the import format.
- 4. Click **Build** on the connection parameters page.
- 5. The **Data Link Properties** screen will appear (see below).

Provi	der Connection Advanced All
Sek	ect the data you want to connect to:
F	DLE DB Provider(s)
1	Acrosoft ISAM 1.1 OLE DB Provider Acrosoft Jet 4.0 OLE DB Provider Acrosoft OLE DB Provider for Indexing Service Acrosoft OLE DB Provider for Internet Publishing
E	Accessel: DLE DB Provider for DDBC Drivers Accessel: DLE DB Provider for DDBC Drivers
1	Vicrosoft DLE DB Provider for Oracle Vicrosoft DLE DB Provider for SQL Server Vicrosoft DLE DB Simple Provider ASDataShape DLE DB Provider for Microsoft Directory Services
	Nest >>

Data Outline View

Located at the bottom of the work area, the **Data Outline View** is an area that allows the centralized management of component information. It can also be used to change Data Field content. (*Note: Data Outline View can only be toggled "on" and "off" through the* **View** tab.)

Name	M Title	ň	Division	A A	Supervisor	WBS Code 🏘
🤶 Parent	📄 <title></th><th></th><th>Chart 1</th><th></th><th>🖵 <None></th><th>Σ 0</th></tr><tr><td>🤶 Child 1</td><td>Title></td><td></td><td>Chart 1</td><td></td><td>🖵 Parent</td><td>Σ 0</td></tr><tr><td>2 Child 2</td><td>Title></td><td></td><td>Chart 1</td><td></td><td>💻 Parent</td><td>Σ 0</td></tr><tr><th>Child 3</th><th>🖹 <Title></th><th></th><th>Chart 1</th><th></th><th>Parent</th><th>T 0</th></tr><tr><th>•</th><th></th><th></th><th></th><th></th><th></th><th>III</th></tr><tr><td>Data view D</td><td>ivisions View</td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table></title>					

Note: The main advantage of Data Outline View over the Box Item menu is that you can manage all of the component data fields in one place.

Hiding and revealing Data Outline View

The **Data Outline View** is not listed on the Toolbars menu; instead, it is found on the **View** tab. To hide and reveal this palette:

- 1. Go to the **View** tab.
- 2. Click on **Data and Divisions**. The palette will toggle in and out of view accordingly.

Data Field types in Data Outline View

Information fields may be of the following types:

- 1. **Text** text information can be typed directly (or cut and pasted) into these fields.
- 2. **Salary** is a powerful field used for dynamic, on– the– fly calculations of budgets and expenditures. It is used in conjunction with the Headcount and Team Budget fields. Single click to open.
- 3. Link double clicking this field launches a new interface for link creation.
- 4. **Image** stored images are linked to a component through this field.

5. **Attachment** – stored information files are linked to a component through this field.

Collapsing Subordinates in Data Outline View

In this view, the hierarchical tree of linked components can be collapsed or expanded by clicking the box next to the parent component's name. (A plus sign (+) in the box indicates that the tree is collapsed and a minus sign (-) indicates that the tree is expanded.)

Additional Data Outline View commands

The following **Data Outline View** functions can be accessed by going to **View** on the **Main Menu**:

- 1. Customize **Data Outline View** columns.
- 2. Intelligence sort.
- 3. List Sort.
- 4. Field Hidden

Manually rearranging data fields in Data Outline View

To manually rearrange the data fields:

- 1. Click on the data field's column header.
- 2. Hold down the Left mouse button and drag the header along the top of the data fields area. Release the header when you reach the desired location. For more details on resizing and rearranging the **Data Outline View** title bar, please see *Data Outline View* in the first chapter of this manual.

(Note: the order of the data fields in Data Outline View does not influence how they appear in the associated on– screen component.)

Displaying and hiding a component's data on the chart

A box component can contain more Data Fields than can be displayed on the chart. To solve this, the user can control which fields are visible. By default, the Name and Title fields are active. To select which fields will be displayed you need to use the **Box Properties** dialog (see below):

Edit Data Define	Box Properties Layout Shape Style Border and Fill Use mouse click to select the formatting cell. Hold Ctrl key pressed to select several cells	×
 ⊕ Photo abc Phone ⊘ eMail ∑ Headcount ∑ Span of Control ∑ Total Salaries \$ Salary 	<title></td><td></td></tr><tr><td>123 Load
∑ Loadcount
abc Note
abc Area of Responsibility</td><td>Cell alignment Display options Cell positioning Font Style Show field title Image: Cell positioning Draw empty photo Word wrap Image: Cell positioning Hide empty Multime Image: Cell positioning Show fined title Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Image: Cell positioning Im</td><td></td></tr><tr><td></td><td>Set this layout as a default for the new boxes.</td><td></td></tr><tr><td>Apply To:
OSelection Entire</td><td>Chart Current Division</td><td>_</td></tr></tbody></table></title>	

Fields are dragged from the field list on the left to the right preview area. In the above example, name and title have been selected to be visible on chart boxes.

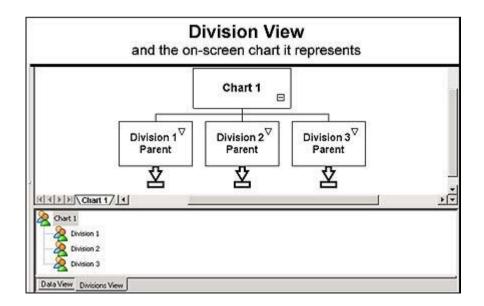
Data Fields information types

Information fields may of the following types:

- 1. **Text** text information can be typed directly (or cut and pasted) into these fields. Single click to open.
- 2. **Salary** is a powerful field used for dynamic, on– the– fly calculations of budgets and expenditures. It is used in conjunction with the Headcount and Team Budget fields. Single click to open.
- 3. Link this is where links are created. Double click in the field to open the Modify Link menu.
- 4. **Image** stored images are linked to a component through this field. Double click in the field to open the **Photo Property** menu.
- 5. Attachment stored information files are linked to a component through this field. Double click in the field to open the Attachment menu.

Division View

Division View allows you to view and navigate complex charts easily. It does this by displaying the entire chart – including all hidden division sub-charts – in an elegant, simple tree structure (see below).



To access Division View:

- 1. Make certain that **Data Outline View** is active by choosing **View** tab and then **Data and Divisions.**
- 2. Click the **Division View** tab at the bottom of the **Data Outline View** window.

Divisions View tree conventions:

- 1. **Main chart** situated at the top of the tree in the upper left corner.
- 2. **Highest tier Divisions** these first divisions run vertically along the left of the diagram.
- 3. All additional (lower) divisions these run in a stair step pattern from left to right, starting from their Parent (first tier) divisions (see below).

🔯 Chart 1
📄 \lambda Child 3's Division
Division 2
Division 3
_
Data view Divisions View

4. **Navigating in Division View** – simply click on the division's name and the chart for that division will appear in the Main Work Area.

Find

Find allows the user to locate specific components through their data fields (such as name, address, business, title, etc.). It is pictured below:

	Find		×
Fill criteria op	tions		Find Next
Find what:	Senior Manager	Ŧ	
Find <u>w</u> here:	Any Field	*	Find <u>A</u> ll
Co <u>m</u> parison:	Contains	Ŧ	<u>C</u> lose
	Match case		Help
Choose rule t	o search]
Rule	Do not use rule when applying style	-	
	Find what: Find <u>w</u> here: Co <u>m</u> parison: Choose rule t	Fill criteria options Find what: Senior Manager Find where: Any Field Comparison: Contains Match case Choose rule to search	Fill criteria options Find what: Senior Manager Find where: Any Field Comparison: Contains Match case Choose rule to search

Accessing the Find menu

The **Find** menu can be accessed in two ways.

- 1. On the **Home** tab go to the **Find** command.
 - Select All
- 2. Press CTRL+F.

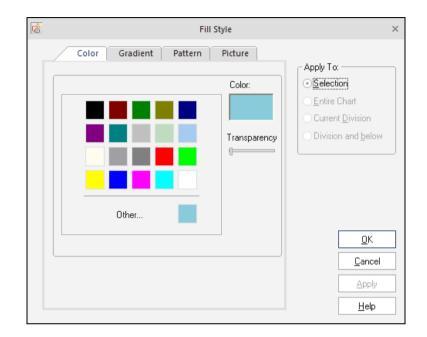
Find search parameter fields

Find contains three search parameter fields. The following is a list of the filter fields and their associated options (accessed through each field's drop down menu).

- 1. **Field Name** this area allows you to conduct a search based on the chart's data fields (i.e. name, title, company, etc.).
 - For the broadest search, choose **Any Field**.
 - To narrow the search, choose a specific data field listed in the drop down menu.
- 2. **Comparison** this filter tells the search engine how to interpret the text you input into the Contents field. It tells the engine if it is looking for text that matches, or text that doesn't, etc. The following is a list of the available options:
 - **Equal to** searches for a data string that is equal to the value in the Contents field.
 - Not Equal to searches for all data that is not equal to (does not match) the value in the Contents field.
 - Not contains this filter searches for all data that does not contain the value in the Contents field.
 - **Empty** searches for components that contain empty fields.
- 3. **Contents** this is where you type keywords relating to your search. A list of previously entered keywords is located in the drop down menu.

OrgChart Professional Interfaces

Fill Style



This powerful mega-menu is divided into four areas (pictured below):

Fill Style menu

Click on a tab to display any of the following four areas:

- 1. **Color**: choose a standard fill color or create a custom one.
- 2. Gradient: choose a gradient (gradual transition) from one color to another.
- 3. **Pattern**: choose from a menu of pre– loaded patterns.
- 4. **Picture**: choose a picture then apply a tint color (to change its shade).

Accessing the Fill Style menu

- 1. Select a component or border.
- 2. Do one of the following:
 - a. Go to the **Home** tab, and click on the **Fill Style** button.



- b. Right click in the chart to launch a pop– up menu. When the menu appears, go to **Format > Fill Style**.
- c. Right click in the chart to launch a pop– up menu. When the menu appears, go to **Format > Border Style**. Once in the **Border Style** menu, click the **Fill** button.

OrgChart Professional Interfaces

Font Style

This menu allows you to control font attributes in every OrgChart element where text can be applied (see below):

Font style		×
Fo <u>n</u> t:	Font Style:	<u>S</u> ize:
Arial	Bold	12
O Arial ▲ O Arial Black O Arial Narrow □ O Arial Rounded MT Bo □ O Arial Rounded MT Bo □ O Arial Unicode MS □ O Baskerville Old Face □ O Baskerville Old Face □ O Berlin Scins FB □ O Bodoni MT □ O Bodoni MT □ O Bodoni MT Iblack ▼	Normal Italic Bold Bold Italic	8 A 9 10 12 14 16 18 20 22 24 26 28 36 48 72
Preview: Underline Strikeout Fill Style	AaBbYyZz	
	ancel	Apply

Accessing the Font Style menu

- 1. Select the border (see *Selecting Borders* for details).
- 2. Access a **Font Style** menu by doing one of the following:
 - a. Go to the **Home** tab and select from the color, font and size choices.
 - b. Right click in a box to launch a pop-up menu. When the menu appears, go to **Format > Font Style**.

The following options are available for font manipulation:

- **Font** a list of available alphabets.
- Font Style a list of choices on letter orientation and weight.
- **Font Size** where letter size is determined. Sizes can be chosen from the list or typed in manually.
- **Effects** two effects are available: 1) Underline and 2) Strikeout (a line is placed through the letters).
- **Fill Style** this button launches the **Fill Style** menu (see *Fill Style*).
- **Sample** this preview window allows you to see your choice before committing it to the on– screen component.
- Script this offers the following encoding options: Western, Hebrew, Arabic and Greek.
- Help this launches OrgChart Help.
- 3. To complete the process, you must select one of the following options:
 - a. **OK** applies and saves your choices then closes the panel.
 - b. **Cancel** closes the panel without saving the changes.

Gradient

A Gradient is a gradual transition from one color to another. The **Gradient** menu is located on the second tab of the **Fill Style** menu (see below):

🛃 Fill Style	×
Color Gradient Pattern Picture Colors Transparency Start Color Image: Color in the start color in the sta	Apply To: Selection C Entire Chart C Current Division Division and below
	OK Cancel
	Apply Help

Accessing the Gradient menu

- 1. Select a component or border.
- 2. Do one of the following:
 - a. Go to the **Home** tab and select the **Fill Style** icon.
 - b. Right click in a box to launch a pop– up menu. When the menu appears, go to **Format > Fill Style**.
 - c. Right click in the chart to launch a pop– up menu. When the menu appears, go to **Format > Border Style**. Once in the **Border Style** menu, click the **Fill** button.
- 4. Choose the **Gradient** tab.

The following options are available for gradient creation:

- 1. **Colors** this determines the gradient's start and end colors. Click the Start Color and End Color fields to launch a palette of colors to choose from.
- 2. **Transparency** these sliders determine the transparency of the colors chosen in the Start Color and End Color fields. On the slider scale, the left end equals 100% opacity and right end equals 100% transparency.
- 3. **Shading Style** select one of these radio buttons to determine the gradient's pattern.
- 4. **Sample** this preview window allows you to see your choice before committing it to the on-screen component.

To complete the gradient process you must select one of the following options:

- 1. **OK** accepts and saves your choices then closes the panel.
- 2. **Cancel** closes the panel without saving the changes.
- 3. **Apply** applies and saves the changes without leaving the panel.

Image Data Menu

Photos and images are managed in the Image Data menu (pictured below):



To open this screen, double click the Photo field in the **Box Item** menu or **Data Outline View** areas.

Inserting a picture into a chart

- 1. Go to the **Box Item** or **Data Outline View.** Double click on the Photo field.
- 2. In the **Photo Property** box, click the **Browse** button.
- 3. Browse to the location that has your image.
- 4. Choose the image file and click **Open**. A preview of the picture will appear in the **Photo Property** preview window.
- 5. Select from the following options:
 - a. **Display Size** determines how large the picture is displayed in the on– screen component. Choices range from 32x32 to 1024x1024 pixels. (512 x 512 is recommended.
 - b. **OK** accepts your choice and inserts it into the chart.
 - c. **Save** *A***s** *–* allows you to browse to a save location, assign a file name and save the image as a BMP, JPEG, GIF, TIFF or PNG.
 - d. Clear data erases all changes and resets the panel defaults.
 - e. **Help** launches the Help menu.
 - f. Cancel closes the panel without saving any data.

LDAP – Special Considerations

Many of the unique settings necessary for a successful LDAP import are entered on this connection parameters screen (see below).

Drochal	At this st paramet	ep you need to s ers to allow OrgO	pedify LDAP (Lig hart connect to	htweight Dire LDAP server	and list the	ss Protocol) cor data which cou	nection Id be imported
##	LDAP con	nection string:					
the second	c	settings: Use your curren Specify custom u Usernama: Password:	Contract of the second	nsoword:		-	
1							

When importing LDAP, take the following into consideration:

- 1. Make certain the server you are importing from is up and running.
- 2. Obtain the **Root DN** and **Root Password** information. This information is usually found on the server's **slapd.conf** configuration file. (In the file, look for the name of the root object (**rootdn**) and the password (**rootpw**).
- 3. Use the information gathered in Step #2 above to fill in the **Username** and **Password** fields of the LDAP connection parameters box (pictured above).
- 4. Make certain you correctly enter the LDAP connection string before proceeding to the next page.

Layout Print Pages

OrgChart can print charts which range from a single page to mega- sized charts which fill an entire wall. The workhorse for this feature is the **Layout Print Pages** menu (see below).

🔞 🛛 Layout P	rint Pages ×
Fit Chart On Pages in <u>W</u> idth	1 • Pages in Height
Orientation <u>P</u> ortrait <u>L</u> andscape	Apply to <u>Entire Chart</u> Current <u>D</u> ivision
<u></u> K	<u>C</u> ancel <u>H</u> elp

To access this menu:

- 1. Go to File tab and select Print. Click on the Chart Page Setup link.
- 2. On the **Page Setup** screen, choose the **Layout Pages** button.

The main purpose of this interface is to create charts which span as many pages as you require. To achieve this, do the following:

- 1. Fit Chart On area set the number of pages your chart will be printed out on:
 - a. For oversized charts (charts more than one page) set the number of pages to more than one in the Pages in Width and/or the Pages in Height field.
 - b. For single page charts leave the Pages in Width and Pages in Height fields set at 1.
- 2. **Orientation area** click a radio button to set the page orientation to either Portrait or Landscape.

- 3. Enlarge chart to fit all available check this box to re– size the chart to spread correctly across all the pages.
- 4. Choose **OK** to accept the settings and close the **Layout Print Pages** screen.
- 5. On the **Print Setup Page** choose either **Print** to go directly to the print interface or **OK** to return to the Main Work area.

Link Data Menu

All links are controlled from the Link Data menu (see below):

🛃 Link Data	X
Link To	
file:/// 💌 C:\OrgChart\OrgChart Information.t	Browse
Display As OrgChart Information.txt	Clear data
OrgChart Information.txt	
OK Cancel	Help

Note: the Browse button is only active when "file://" is chosen. In all other instances it will be inactive and grayed out.

The Link Data menu can be opened in the following ways:

- 1. **Box Item** double click e-mail office, e-mail home, or any custom designed data field with a Link attribute.
- 2. Data Outline Pane can launch the Link Data menu in two ways:
 - a. If no links are associated with the component go to Box Item and click in the visibility column of e– mail office, e– mail home, or any custom designed data field with a link attribute. The item will now appear in the **Data Outline View**. Once the item is present, go to **Data Outline View** and double click the cell which contains the name of the link.

- b. If links are already associated with the component double click the cell which contains the name of the link.
- 3. **On-screen component** double click any visible data field which has a link attribute. *Note: if no data fields with a link attribute are visible, go to the* **Box** *Item menu, choose a data field with a link attribute (i.e. e– mail, etc.) and click in the visibility column (for more details, see Box Item menu).*

Link creation in the Link Data menu

- 1. **Choose the Link type**. Click the down arrow to expand the **Link To** drop down menu. The following types of links are available:
 - a. **file:**/// use by clicking the **Browse** button to locate a valid entry then click **Open**. The choice will be displayed the upper field.
 - b. Mail to type a valid email address into the upper field.
 - c. http:// type a valid internet address into the upper field.
 - d. **ftp:**// requires a valid ftp (file transfer protocol) address to be typed into the upper field.
- 2. Name your link. The name that appears in the Display As field is the name that will appear in the on– screen component. Names can be created in the following ways:
 - a. **Customize the link name** type a new name into the Display As field, then click **OK** or hit the **Enter** key.
 - b. Use the link's original name (no modification) leave the Display As field empty then click **OK** or hit the **Enter** key.
- 3. **Test the link**. Your link will appear, underlined in blue, in the area beneath the Display As field and above the navigation buttons (see the underlined *mailto:* link in the above illustration).
- 4. **Complete the process**. Select one of the following options:
 - a. **OK** accepts your choice and inserts it into the chart.
 - b. Clear data clears all changes and resets the menu defaults.
 - c. **Help** launches the Help menu.
 - d. **Cancel** closes the panel without saving any data.

Multiple Shapes

This special dialogue allows multiple shapes to be simultaneously placed on the chart (see below):

6	Mult	iple		×
Number of Sha	apes		8	*
		^	<u> </u>	yle
			<u>B</u> order	Style
Rectangl	e		Conne	ctor
			Font S	tyle
		~	Font]	[itle
Preview				
	[Nai [Tit	me] ile]=		
	(Nai (Tit	-		
<u>0</u> K	<u>C</u> a	ance		<u>H</u> elp

Accessing the Multiple Shapes menu

This menu is automatically launched when the **Multiple Shape** component is applied to the chart.

Multiple Shape menu

The following options are available from the Multiple Shapes menu:

Number of Shapes – this determines how many components will be automatically placed on the chart. The number can be chosen by using the arrows or typed in manually.

- 1. **Shape Box** this scroll bar displays all available shape designs. Click on an icon to choose that style. All styles will be immediately updated in the Preview area.
- 2. **Preview** this preview window allows you to see your choice before committing to a final decision.
- 3. Fill Style this launches the Fill Style menu (for more details, see *Fill Style*).
- 4. **Border Style** this launches the **Border Style** menu (for more details, see *Border Style*).
- 5. **Connector Style** this launches the **Connector Style** menu (for more details, see *Connector Style*)
- 6. **Font Style** this launches the **Font Style** menu (for more details, see *Font Style*).
- 7. **Font Title** this also launches the **Font Style** menu (for more details, see *Font Style*).
- 8. **Help** this launches OrgChart **Help**.

To complete the Multiple Shapes process, you must select one of the following:

- 1. **OK** applies and saves your choices then closes the panel.
- 2. **Cancel** closes the panel without saving the changes.

Calculations

Use the Chart Data Set dialog under the Data tab to add and configure calculations.

FILE	ном	E GROUPING	INSERT	PAGE L	AYOUT	DATA	DESIGN	VIEW		
mport	=	蠡 Resync Data 螽 Resync Properties	Markers	Manage Rules	Reports	Fast Reports	Export Wizard	Export Summary Fields		AB Compare to Active
Import & Configuration			Ru	les	Ana	lyze		Export	Com	pare

Keep in mind that the **Chart Data Set** is the chart's database and that it is comprised of the fields that were imported from external data, provided the import function was used to build the chart.

Selecting **New** (1) will add a new field to the chart database. If you select **Add Predefined** (2), there are a number of pre-set calculations such as headcount and span of control that are ready to use.

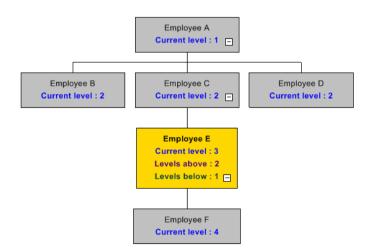
After adding a new calculation such as headcount, it can be edited in the **Chart Data Set**. The formula can be modified (3) to change the way headcount is calculated, or to introduce a condition where records are included or omitted.

Name	Туре	Visible	Display name	Formula	Format		New
Division	aba Text						
Department	abe Text					(2)	Add Predefined.
Telephone	aba Text					-	Delete
eMail	🥏 Link						Delete
Start Date	🐯 Date/Time				-0		<u>S</u> et Title
Tenure	123 Numeric						
5alary	\$ Currency				-00		
Current Performance	123 Numeric				-0		
Average Performance	123 Numeric						Move <u>U</u> p
Photo File	👶 Image						Move Down
evels above	∑ Calculated			Σ			Move Do <u>w</u> n
evels below.	∑ Calculated			Σ			
Current level	∑ Calculated			2			
Headcount	∑ Calculated			Σ.	(3)		OK
5pan of Control	∑ Calculated			Σ			
Median Span of Control	∑ Calculated			₩₩			Cancel
Average Span of Control	∑ Calculated			Σ			
				-		~	Help
	Calcula	ted Field			×		
Deration			Affected	l <u>S</u> cope			
Count			Branch	and Mgr.	-		
				_			
				Use co	ondition		

Standard calculations included consist of Sum and Count for:

🗟 🛛 Add Predefin	ned Columns X
Name tab Title Supervisor ab: Conpany ab: Organization ∑ Division Title WBS Code Headcount Span of Control Median Span of Control Average Span of Cont Levels above Levels above	Current level Solary 22 Load Definition Def
4	Add <u>C</u> lose

- 1. **Headcount** summarizes the number of boxes reporting to a particular manager to the lowest level of the branch.
- 2. **Span of Control** counts the number of boxes reporting to a manager.
- 3. **Levels** calculations are provided for current level, levels above and below. OrgChart introduces a calculation that specifies the current level, as shown in the boxes below. The number of levels that are above a particular box to the top is calculated as "levels above". The number of levels below a box to the bottom of the hierarchy is calculates as "levels below".



The "levels" calculation may be used to filter information, perform a search, or format by hierarchy level. Additional calculations, such as "total headcount at level 2" for example, are now possible with the levels calculation.

4. Calculation of **Median and Average**– OrgChart calculates Average and Median, in addition to Sum and Count. These calculations can be applied to any numeric field. Now you can calculate average salary, median age, and more using these new functions.

5. Calculation of Average and Median Span of Control (Platinum version Only)

Now the OrgChart program calculates Average and Median Span of Control. If you need to calculate the Average Span for a particular management level, the Average Span can be used with a conditional scope of a specific hierarchy level. Consider that OrgChart's calculation results are integer only, so any results are rounded to the nearest whole number.

6. Conditional calculations using Level

OrgChart calculations will now include a condition to include or omit records based on hierarchical level. An example would be the total number of employees at level 3, or the total salaries of those at level 2, the number of part time workers below level 5, etc.

Name Oper			•	Affected Scope Branch and Mgr.	New
Skills_3				Use condition	Add Predefined
Email				· · · · · · · · · · · · · · · · · · ·	Delete
Prior Year Salary			ОК	Cancel Help	
Chosen Employee			UK		Set Title
Chief		Text			
Headcount	Σ		🗷 Condition		
Span of Control	Σ	Calculated			
WBS Code	Σ	Calculated	Use condition from the	Include in scope if meet condition —	
Total Salaries	Σ	Calculated	right to include box into calculation. If you wish	Find what: 3	
Store Type		Text	box to participate in	Find where: Current level	
Levels above	Σ	Calculated	calculation without any	Currenciever	<u> </u>
Levels below	Σ	Calculated	condition, keep check box unchecked	Comparison Equal to	-
Current level	Σ	Calculated	ununeuxeu	Much case	
Median Span of Control	Σ	Calculated			H
Average Span of Control	Σ	Calculated		/	
Total Employees Level 3		Calculatec 💌			· · ·

This calculation will now allow you to summarize totals for each level of the organization and display them on the top page of the chart. This works for Count, Sum, Average and Median for any numeric value.



Example of Conditional Total Headcount by Hierarchy Level

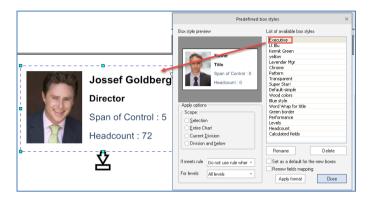
Preferred Styles

Preferred Styles are preset, custom box configurations. There are preset box styles that come with the application, and the user may configure custom Preferred Styles.

Under the **Design** tab select **Styles**.

FILE	HOME	GRO	UPING IN	ISERT P/	AGE LAYOU	T DATA	DESIGN	VIEW
Theme	Background	日 Border	Show Background	Apply Template	Styles			
	Ch	art		Templates	Box			

Choose **Add to** if you have configured and selected a box style you wish to add to the library or select **Preferred Styles** if you want to apply a style from the list to a selected box.

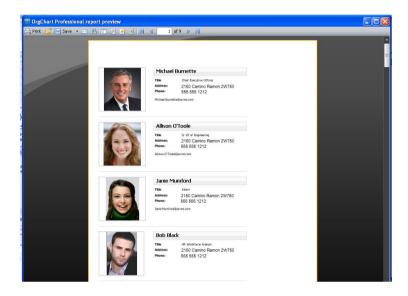


Preferred Style showing Name, Title, Photo and Calculations

Notice that the styles can be applied with any scope, or they may be applied to individual employees meeting specific rule criteria.

Fast Reports Module (Platinum version only)

OrgChart's Fast Reports is a new report writer module. It enables user configurable reporting of all kinds. OrgChart Platinum ships with two preset report templates.



Fast Reports Employee Photo Directory

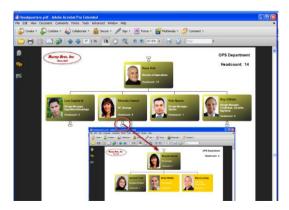
Custom reports can be configured with filter, sort and calculations. Reports can be saved in a variety of formats for sharing.



Interactive PDF

OrgChart's special Interactive PDF option lets you navigate your way – up or down – through a multi-level, multi-paged org chart. The way you created your Org chart in the application is the way you see it in the Interactive PDF. Publishing options allow you to specify scope – be it the whole organization or just a group.

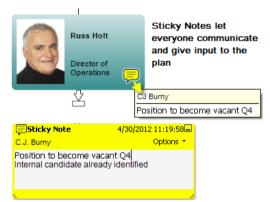
To create a PDF use the **Publish** wizard on the **File** Tab.



Click on the Navigation Arrow in the PDF and you can drill down the organization and details about the people.



The Interactive PDF gives you the ability to preview, search for people, and even add sticky notes.



The new PDF becomes a powerful method of communication and collaboration. Recipients who do not have the OrgChart software can still view and search the organization quickly and easily.

The Interactive PDF also generates a table of contents and index that make it easy to find anyone in the chart.

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📮 Create	• 🦨 Combine • 🔬 Collaborate • 🔒 Se	cure 🔹 🥒 Sign 🔹	E Fo	orms 🔹 📑 Multimedia 🔹 💪	Comment •			
	📋 🖃 🌮 🔷 🐥 💈 / 56 🛛	114 🖑 🤻	• •	67.6% • 拱 🚱	Find	•		
Ð			Cor	itents				
%	Headquarters						Page 4	
	Michael Burnette						Page 5	
1	Abbie Landies						Page 6	
	Engineering Department						Page 7	
	Dan Allen						Page 8	
	Engineering Department						Page 9	
	Mark Pringle						Page 10	
	Arlo Guthrie						Page 11	
	Jerome Howard Dan Tobler						Page 12	
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\$	Abbie Landies	Page 6	Page 4	Paul McNaughton		Page 19	Page 9	
	Amanda Twill	Page 45	Page 43	Rhonda Gasser	Page 44	Page 37	Page 43	
1	Arlo Guthrie	Page 11	Page 9	Rob Nance		Page 48	Page 37	
	Ashly Gorakpiraia	Page 51	Page 49	Robert Frye		Page 20	Page 9	
	Brian Ridder	Page 46	Page 43	Roy Gilliam	Page 50	Page 37	Page 49	
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Succession Planning

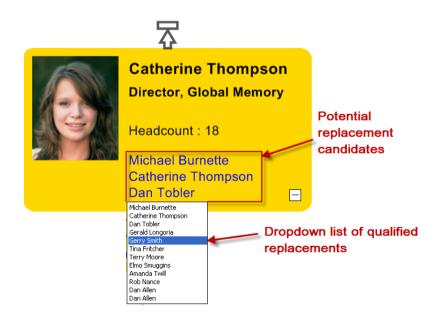
Identifying potential successors using rules and queries

Organizations change all the time. Therefore succession plan is critical. OrgChart enables any organization to do "What-if" modeling and planning rapidly.

OrgChart Pro's new Query function enables you to find and show potential replacements for an employee. Queries may be simple or you can develop rules that are based on different parameters such as skills or performance ratings.

Rule field value	X
Attached rule	
Hi Potential:(Performance Rating Contains exceeds)	Attach rule
- Performance_Rating Contains exceeds	Detach rule
	OK
	Cancel
1	
Find in scope Entire Chart	
Weigh of selected sub-rule within attached rule. (Numeric value from 0 to 10)	

In the Query above the rule will search for individuals with a performance rating equal to "exceeds" and display the results in an employee's box.

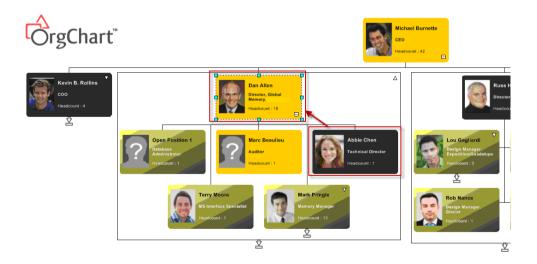


The Query field in this employee's box shows a list of candidates with performance ratings equal to "exceeds". A dropdown list allows you to click and inspect any of the possible replacement candidates.

You can create an unlimited set of rules or search criteria, and each person's box can have a different rule, depending on the desired succession criteria.

Replace Person Function

Quickly assign people to new positions. OrgChart has the ability to find, replace and promote employees with desired skill sets or attributes. Moving people in any chart is a very tedious process but even more so in large multilayered organizational charts. With the new Replace function the task is made easy. When a box is moved you have complete control over exactly which data fields move with a person and which data fields are inherited from the new position. Let's walk through an example on how a promotion would be accomplished.



Appendix A:

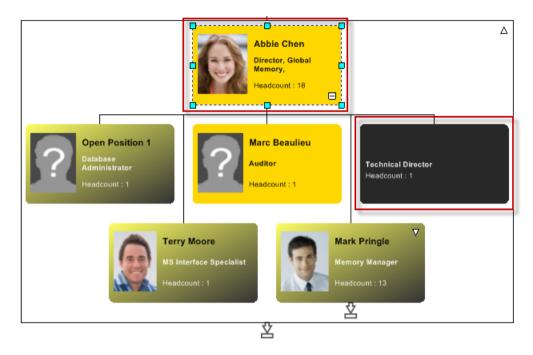
OrgChart Professional Interfaces

• 📬 🖬 🕼 😒	🐵 👔 🕁 🕇 😴 🗧 OrgChart Professional - Org												
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	_) Da a a		0.01.10						vidual with cified criteria.

To replace a person:

- 1. Select a person's box to replace (i.e., Dan Allen).
- 2. Click on the Replace Person icon.
- 3. Search for a person with a specific name or one meeting desired requirement (i.e., Performance Rating equal to "exceeds").

🖾 Find				
Search scope	Fill criteria options			
C Selection	Find what:		_	Find
Entire Chart	Find where: Any Fiel	d	-	ок
C Current Division	Comparison: Contains	5	_	Cancel
O Division and below	Г	Match case		Help
C Search by criteria	-Choose rule to search			
Advanced rule search	Rule Hi Poten	tial	-	
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Employee_Name	Title	Performance_Rating	Years_in_Posi	
🤦 Michael Burnette	EO EO	Exceeds	1 14	
🧟 Abbie Chen	Technical Director	exceeds	1 8	
🤶 Dan Allen	📄 Director, Global Men	Exceeds	1 2	
🧟 Dan Tobler	📄 Manager	Exceeds	10	
🧟 Gerald Longoria	📄 Advanced Engineeri	Exceeds	1 4	
🤦 Gerry Smith	Designer	Exceeds	1 1	
Tipa Eritcher	📑 GCM - Notebook De	Evceeds	1 2	<u>~</u>



4. Select the desired person (i.e., Abbie Chen) and click OK.

5. Abbie is promoted and a vacant position remains to be backfilled.

It's that easy. OrgChart's Replace function has a variety of options to find, fill and replace positions within the org chart. When your succession planning exercise is complete, you can export data to Excel or publish to a sharable format such as PDF or PowerPoint.

Custom Rules

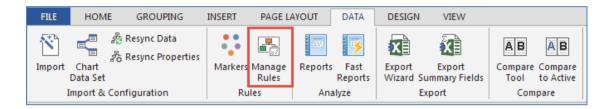
Rules are a very powerful way to search, format and change the structure of the organization chart. Creating custom rules makes for a more efficient, repeatable and tailored planning process.

OrgChart allows you to create simple and compound rules that can be defined for use with style markers, data filtering, template application and the format painter tool.

With OrgChart making rules for performance rating or any special condition where the data is available is easy.

For example: we want to find all individuals we have identified as a 'Flight Risk', who have a performance rating of "exceeds" and have been on the job for more than three years. You define the rule as follows:

Click on the Manage Rules icon in the Data tab.



Rules properties	X
Existing rules Flight Risk Hi Potential Good Performer Bottom 10% Rule structure	New rule Delete rule
	Add existing rule Add criteria Edit Renmove from rule
	Toggle rule logic
Details	
((Performance_Rating Contains exceeds)) And (Years_in_Position Greater then 3)	ок
	Cancel

Rules can be used in conjunction with any query, find, format or marker application. For example as a markers, when the "Flight Risk" criteria is met the identified individuals box is made red.

5				903	
	🖄 Find				
	Search scope	– Fill criteria op	tions		Find Next
	C Selection	Find what:		-	
	<u> <u> </u> </u>	Find <u>w</u> here:	Any Field	-	Find <u>A</u> ll
	C Current <u>D</u> ivision	Co <u>m</u> parison:	Contains	-	<u>C</u> lose
	C Division and <u>b</u> elow		Ma <u>t</u> ch case		Help
1	C Search by criteria	Choose rule	to search		
	Advanced rule search	Rule	Do not use rule when applying style	-	
			Do not use rule when applying style Flight Risk	<u>^</u>	
1.50	Analys	51	Hi Potential Good Performer	~	(S)

Select a search rule.



One individual meeting the Flight Risk rule was located. In a Find All option, the entire list of such individuals can be seen in the data view pane.

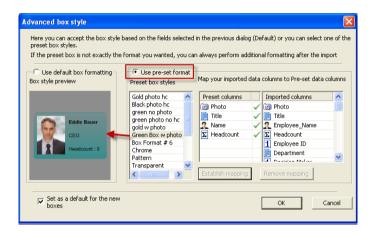
-	_							
-	P	Find						
- 2.0		Search scope	Fill criteria op	ptions		Find Next	erald	Lon
-		C Selection	Find what:		*	Find All		
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		C Current Division	Comparison:	Contains	-	Close	lvanc	ea En
		O Division and below		Match case		Help		
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_	_	Amanda Twill		Storage Architect	Exceeds	1 7		
	2	Gerald Longoria		Advanced Engineerir		1 4		
_	-	Michael Burnette		EO CEO	Exceeds	1 14		
	1	Rob Nance		📄 Design Manager, Gla	icier 📄 Exceeds	1 5		

Advanced Import Controls

Using the Import Wizard, you can specify preset or custom box styles, plus data alignment parameters. It is easy to pick the box format style before you import data.

		so, you will specify the			ig tables for the iported.
	Name	Туре	Visible	Display name	New
'QV	Employee ID Employee_Name	1 Numeric 2 Name			Add Predefined
	Nitle	Text			Delete
	Department Decision Maker	Text			Set Title
<	lient Facing	1 Numeric	ö	ö	Set as Key Column
	src_IsAssistant	Text			Dec as key Coldmin
	 Supervisor Supervisor ID 	Supervisor			Move Up
\geq	<				Move Down
	Manage System column	s Reset		_	Advanced style

The advanced style option shows the template library.



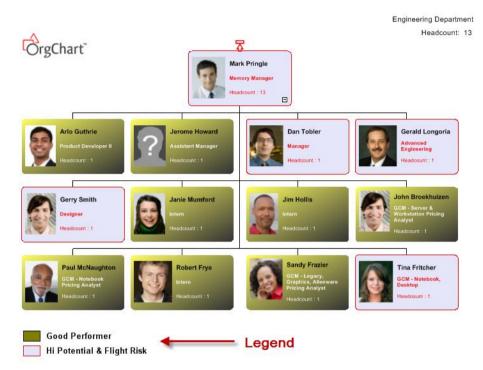
With OrgChart you select a box design template and direct how the data fields are mapped from the imported data. The benefit is that your organization will have a standard look for your company.

Format Painter / Paintbrush

Format Painter tool is a timesaving feature of OrgChart. Boxes can be configured to any size, color, font, or dataset, and then propagated throughout the chart based on a scope or a single data condition. Using the rules option, OrgChart's Format Painter can act on multiple data conditions. This feature is very helpful with larger, more complex organizational structures.

P -	<u></u>	
Paste Format	Mark Pringle Memory Manager Headcount : 13	
Apply Scope: © Selection © Entire Chart © Current Division © Division and below Apply for levels: All levels	Apply if meeting this the condition Find what: Find where: Any Field Comparison: Contains Contains Find wheth case Connector Style Size Size Size Connector Style Size Size Connector Style Size Size Size Size Size Size Size Siz	

The "Apply if Meeting Condition" feature is available for ad hoc formatting, but OrgChart has an "Apply if Meeting Rule" option. This feature allows for conditional formatting based upon custom rules that can be applied at any time. Rules may handle multiple or compound data and criteria conditions.



Automatic legend feature adds context to the chart.

Silent Update

You can now schedule automatic daily updates to the org chart using data from your HR database. The OrgChart program can be run using command line parameters. Updates may be made to a web site, PowerPoint, and more.

This feature is a great help to users who receive frequent changes to their HR data and want to update the OrgChart on a daily basis. This frees their time from having to run the OrgChart program manually.

With Silent Update you can schedule a job to run OrgChart with the most recently updated organization / HR data, and automatically update the common outputs such as a PowerPoint presentation or Flash web site. (Details can be found here:

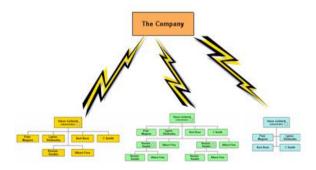
www.officeworksoftware.com/programs/documentation/silentupdate.pdf

Creating Charts from Multiple Files

Save Division to file / Create Division from file – This gives you the ability to break a larger chart into smaller, separate chart files, or create a larger chart from many smaller chart files.

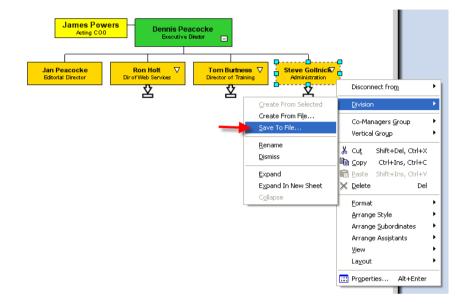
OrgChart has the ability to break a chart into divisions (or smaller sub charts), making it easier to arrange a presentation in the most readable format. Using the **Save to file**... feature in the **Divisions** menu, you can also save a division to a separate chart file.

You can also delete members of a division by deleting the division manager. Finally, a smaller chart can have multiple charts appended by using the "Division / Create from file" command. This feature is perfect for larger companies where one person is combining charts of different groups into one master chart.



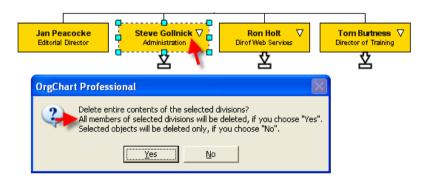
Save Division to a file

In this example we save Steve's division to a separate file names scs1.toc.



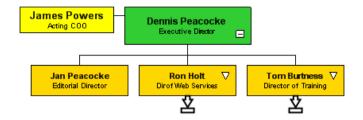
Delete Division

Delete Steve's division and all of its members.



Interfaces

The result: Steve and all of his team have been removed.



Create Division from file

We will now add in Steve's division from the previously saved file.

James Powers Acting COO	Dennis Peacocko Executive Director	Disconnect from	
Jan Peacocke	Ron Holt	Division •	⊆reate From Selected
Editorial Director	Dir of Web Services	Co-Managers Group	Create From Fi <u>l</u> e 🔫 🚽
	凶	Vertical Group	Save To File
		👗 CutShift+Del, Ctrl+X	<u>R</u> ename
		Copy Ctrl+Ins, Ctrl+C	Dismiss
		Raste Shift+Ins, Ctrl+V	Expand
		X <u>D</u> elete Del	Expand In New Sheet
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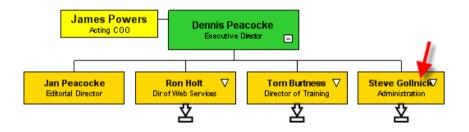
... select the file ...

Look in:	Daily Work	🔹 🔶 🗈 💣 💷-	1
27	Name	Size Type	Date
	BLS Web Site 2-13-07 v2 shell	16 KB OrgChart Professio	12/24
Recent	and sets 3	8 KB OrgChart Professio	12/24
	X 9532	8 KB OrgChart Professio	12/24
	🖽 sest 🚽 👘	8 KB OrgChart Professio	12/24
	12-21-07 test 23	79 KB OrgChart Professio	12/24
Desktop	12-21-07 test 22	76 KB OrgChart Professio	12/24
	12-21-07 test 2	71 KB OrgChart Professio	12/21
	A nick	11 KB OrgChart Professio	12/21
My Documents	12-21-07 test	76 KB OrgChart Professio	12/21
Hy Documents	Inicholas	11 KB OrgChart Professio	12/21
-	alload test	13 KB OrgChart Professio	12/21
	CrgChart 12-19-07	32 KB OrgChart Professio	12/19
My Computer	Kecko 12-17-07	100 KB OrgChart Professio	12/18
	Plastic Logic Org Dec 1 b	87 KB OrgChart Professio	12/17
(]	<		>
My Network	File name: scs1	•	Open
Places	Files of type: Projects (".toc)		Cancel

Specify the top level.

Divisions	3
Multitled 은 Magnetic Gollnick's Division 는 소출 Steve Gollnick's Division	
OK Cancel Help	

The result: Steve's chart has been incorporated into the larger chart.

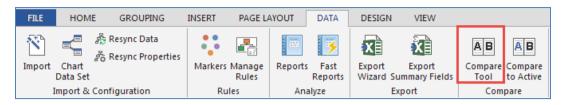


It is important to note that multiple files can be appended at the same time. Also note that the columns of chart data will require mapping if not identical in both files.

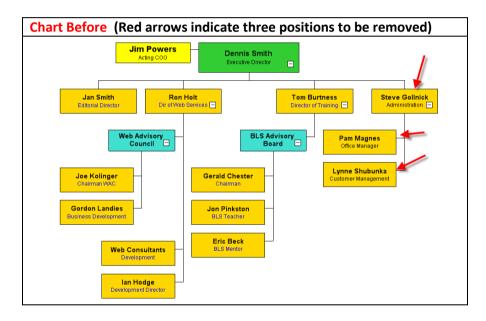
Audit and Compare Tool for Tracking Org Chart Changes

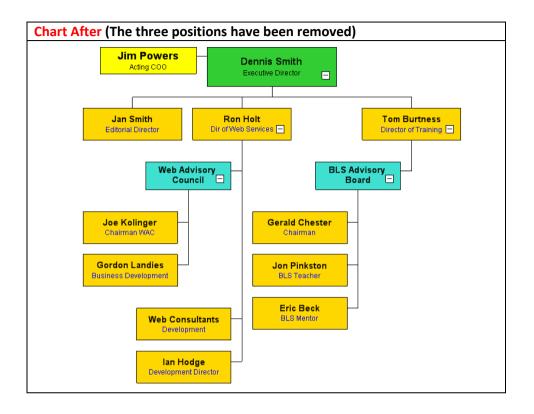
Common situation: You have made numerous changes to a chart since last month. So, what changed? How can you know if all of the intended changes were made?

The **Compare Tool** creates a color– coded, visual presentation revealing 'what has changed' as you continue to make chart updates. You can compare charts within one file, or compare charts in two separate files.



When making changes to a chart it is recommended that you work with a copy. After making changes you can run the compare utility to illustrate exactly what has changed from the previous version of the chart.





Compare Tool Results Reports

The comparison of the two charts reveals changes with color coding. **Red** indicates deleted records, **Green** for added, and **Blue** for any field that has changed. All results can be published to Excel with color coding.

e	- 🖬 🚯 🖪 🖗		8								
	Name	Title	Supervisor	Photo	Phone Offi		Name	Title	Supervisor	Photo	Phone C
1	BLS Advisory Board		Tom Burtness			1	BLS Advisory Board		Tom Burtness		
2	Dennis Smith	Executive Director				2	Dennis Smith	Executive Director			
3	Eric Beck	BLS Mentor	BLS Advisory Board			3	Eric Beck	BLS Mentor	BLS Advisory Board		
4	Gerald Chester	Chairman	BLS Advisory Board			4	Gerald Chester	Chairman	BLS Advisory Board		
5	Gordon Landies	Business Development	Web Advisory Council			5	Gordon Landies	Business Development	Web Advisory Council		
5	Ian Hodge	Development Director	Ron Holt			6	Ian Hodge	Development Director	Ron Holt		
7	Jan Smith	Editorial Director	Dennis Smith			7	Jan Smith	Editorial Director	Dennis Smith		
8	Jim Powers	Acting COO	Dennis Smith			8	Jim Powers	Acting COO	Dennis Smith		
9	Joe Kolinger	Chairman WAC	Web Advisory Council			9	Joe Kolinger	Chairman WAC	Web Advisory Council		
10	Jon Pinkston	BLS Teacher	BLS Advisory Board			10	Jon Pinkston	BLS Teacher	BLS Advisory Board		
11	Lynne Shubunka	Customer Management	Steve Golinick			11					
12	Pam Magnes	Office Manager	Steve Golinick			12					
13	Ron Holt	Dir of Web Services	Dennis Smith			13	Ron Holt	Dir of Web Services	Dennis Smith		
14	Steve Golinick	Administration	Dennis Smith			14					
15	Tom Burtness	Director of Training	Dennis Smith			15	Tom Burtness	Director of Training	Dennis Smith		
16	Web Advisory Council		Ron Holt			16	Web Advisory Council		Ron Holt		
17	Web Consultants	Development	Ron Holt			17	Web Consultants	Development	Ron Holt		
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Microsoft Project Import and Export – Work Breakdown Structure (WBS) Modeling

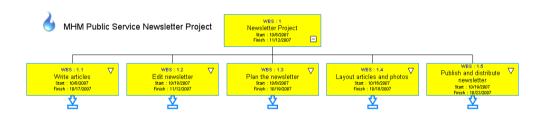
OrgChart reads MS Project Schedule (.mpp) files, presenting the project outline in a work breakdown structure (WBS) format. Now you can import an MS Project schedule and turn it into a WBS view in OrgChart.

Communicate your project plan with greater clarity. Many times a different picture can help team members, management, and clients understand and plan a project. The new Work Breakdown Structure (WBS) view available through OrgChart helps condense even large complex project plans into a presentation that can be easily navigated, analyzed, communicated, and understood.

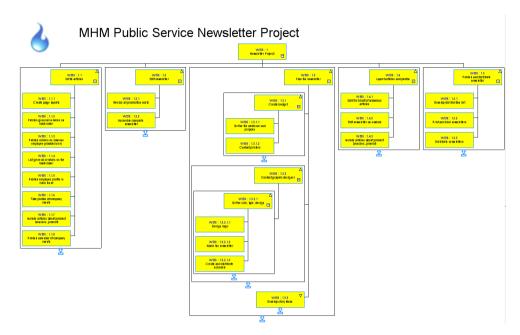
This project plan can also be viewed as a WBS chart:

	0	WBS	Task Name	Duration	Start	Finish	%	Nov '07 7 14 21 28 4 1
1		1	Newsletter Project	25.25 days	Mon 10/8/07	Mon 11/12/07		
2		1.1	Write articles	8 days	Mon 10/8/07	Wed 10/17/07		
11		1.2	🛨 Edit newsletter	17.25 days	Thu 10/18/07	Mon 11/12/07		+
14		1.3	Plan the newsletter	10 days	Mon 10/8/07	Fri 10/19/07		
29		1.4	Eayout articles and photos	3 days	Tue 10/16/07	Thu 10/18/07		
33		1.5	Publish and distribute newsletter	3 days	Fri 10/19/07	Tue 10/23/07		+++++++++++++++++++++++++++++++++++++++

The import process takes seconds and gives you the option of working with the project in a top– down, structured planning method.



The MS Project chart in this example contains more activities, which also can be seen in the WBS view in OrgChart. Each of the nodes can be expanded or collapsed for optimal viewing. If you want to see the entire project on one large piece of paper, just select a larger paper size or plotter output.



Below is the MS Project outline Gantt that the above chart represents:

	WBS	Task Name	Duration	Start	Finish	% Com
1	1	Newsletter Project	25.25 days	Mon 10/8/07	Mon 11/12/07	
2	1.1	Write articles	8 days	Mon 10/8/07	Wed 10/17/07	
3	1.1.1	Create page layouts	1 day	Mon 10/8/07	Mon 10/8/07	
4	1.1.2	Publish general services on back cov	1 day	Tue 10/9/07	Tue 10/9/07	
5	1.1.3	Publish column on how one employee	1 day	Wed 10/10/07	Wed 10/10/07	
6	\$ 1.1.4	List general services on the back cov	1 day	Thu 10/11/07	Thu 10/11/07	
7	1.1.5	Publish employee profile in each issue	1 day	Fri 10/12/07	Fri 10/12/07	
8	1.1.6	Take photos at company events	1 day	Mon 10/15/07	Mon 10/15/07	
9	1.1.7	Include articles about product launche	1 day	Tue 10/16/07	Tue 10/16/07	
10	1.1.8	Publish calendar of company events	1 day	Wed 10/17/07	Wed 10/17/07	
11	1.2	🖃 Edit newsletter	17.25 days	Thu 10/18/07	Mon 11/12/07	
12	1.2.1	temize all production costs	8.75 days	Thu 10/18/07	Tue 10/30/07	
13	1.2.2	Assemble complete newsletter	8.5 days	Tue 10/30/07	Mon 11/12/07	
14	1.3	Plan the newsletter	10 days	Mon 10/8/07	Fri 10/19/07	
15	1.3.1	Create budget	2 days	Mon 10/8/07	Tue 10/9/07	
16	1.3.1.1	Define the audience and purpose	1 day	Mon 10/8/07	Mon 10/8/07	
17	1.3.1.2	Contact printers	1 day	Tue 10/9/07	Tue 10/9/07	
18	1.3.2	Contact graphic designer	3 days	Wed 10/10/07	Fri 10/12/07	
19	1.3.2.1	🖃 Define size, type, design	3 days	Wed 10/10/07	Fri 10/12/07	
20	(.3.2.1.1	Design lago	1 day	Wed 10/10/07	Wed 10/10/07	
21	\$.3.2.1.3	Name the newsletter	1 day	Thu 10/11/07	Thu 10/11/07	
22	.3.2.1.3	Create and distribute schedule	1 day	Fri 10/12/07	Fri 10/12/07	
23	1.3.3	Develop story ideas	5 days	Mon 10/15/07	Fri 10/19/07	
24	1.3.3.1	Include articles about product laur	1 day	Mon 10/15/07	Mon 10/15/07	
25	1.3.3.2	Offer discounts and other perks to	1 day	Tue 10/16/07	Tue 10/16/07	
26	1.3.3.3	Develop photo ideas	1 day	Wed 10/17/07	Wed 10/17/07	
27	1.3.3.4	Create a stylebook for contributor:	1 day	Thu 10/18/07	Thu 10/18/07	
28	1.3.3.5	Assign articles	1 day	Fri 10/19/07	Fri 10/19/07	
29	1.4	Layout articles and photos	3 days	Tue 10/16/07	Thu 10/18/07	
30	1.4.1	Edit first draft of individual articles	1 day	Tue 10/16/07	Tue 10/16/07	
31	1.4.2	Edit newsletter as a whole	1 day	Wed 10/17/07	Wed 10/17/07	
32	1.4.3	Include articles about product launche	1 day	Thu 10/18/07	Thu 10/18/07	
33	1.5	Publish and distribute newsletter	3 days	Fri 10/19/07	Tue 10/23/07	
34	1.5.1	Develop distribution list	1 day	Fri 10/19/07	Fri 10/19/07	
35	1.5.2	Print and bind newsletters	1 day	Mon 10/22/07	Mon 10/22/07	
36	1.5.3	Distribute newsletters	1 day	Tue 10/23/07	Tue 10/23/07	

Data Import Supports Both One and Two Column Hierarchy Methods

Hierarchies are typically built on Subordinate / Supervisor reporting relationships. An Organizational Breakdown Structure (OBS) or Work Breakdown Structure (WBS) can be used to develop the chart hierarchy.

For example, this is an Excel worksheet with a standard two– column hierarchy method (each employee has a supervisor):

	A	E	G	
1	NAME	JOBSUPERVISOR 🚽	JOBTITLEDESCR 🛛 🕞 🛛	
	Abragamova, Svitlana D	Rinkens, Helen M	A/P Assistant	
3	Abraham, Lisa A	Hartle, Sarah S	Area Manager 🛛 💦	
4	Acker, Christian P	Meyer, Joachim	Art Director	
5	Admana, Mahalia	Sias, Malia C	Senior Denim and Woven't Designer A	
6	Ahn, Harvey H	Kinder, Philip T	Director of Business Intelligence	
7	Aldea Maria E	San Juan Christonher G	Designer Knits	

The Two columns hierarchy option shows in the import process as the following:

OrgChart	selecting correct "Position" and "Reports To	d chart hierachy or establish hierarchy manually by To" columns. Two columns A Mishara, Peter E Buser, Justin J Buser, Justin J Fields, Alan L	^
	NAME Preferred Name Abragamova, Svitlana D Lana Abraham, Lisa A Acker, Christian P Admana, Mahalia Molly Ahn, Harvey H Aldea. Maria E	O un of parts	
	Dotted-line hierarchy	Cohen, Diane	elp

But we can also import the following Excel file using the Single column (outline number) method:

	Α 🖌	В
1	WBS 🛑	Name
2	1	Newsletter Project
3	1.1	Write articles
4	1.1.1	Create page layouts
5	1.1.2	Publish general services on back cover
6	1.1.3	Publish column on how one employee provided serv
7	1.1.4	List general services on the back cover
8	1.1.5	Publish employee profile in each issue
9	1.1.6	Take photos at company events

In the import process the Single column radio button is checked, along with the appropriate delimiter. This is all that is needed to establish the chart's hierarchy.

i mannes i i Sunninka i i i	_
	×
At this step you can modify autodetected chart hierarchy or establish hierarchy manually by selecting correct 'Position' and 'Reports To' columns. No hierarchy Single column Two columns Hierarchy mass and the selecting correct 'Position' and 'Reports To' columns. Level delimiter:	
< Back Next > Cancel Help	
	selecting correct "Position" and "Reports To" columns. No hierarchy Single column Two columns Hierarchy WBS Level delimiter: UWBS Name 1.1.1 Create page layouts 1.1.2 Politish general services on back cover 1.1.3 Publish column on how one employee provid 1.1.4 List oneral services on the back cover 1.1.4 List oneral services on the back cover 1.1.5 Publish column on how one employee provid 1.1.4 List oneral services on the back cover 1.1.5 Publish column on how one employee provid 1.1.4 List oneral services on the back cover 1.1.5 Publish column on how one employee provid 1.1.6 Publish column on how one employee provid 1.1.7 Publish column on how one employee provid 1.1.8 Publish column on how one employee provid 1.1.9 Publish column on how one employee provid 1.1.1 Urited Publish column on how one employee provid 1.1.2 Publish column on how one employee provid 1.1.3 Publish column on how one employee provid 1.1.4 List one column on how one employee provid 1.1.5 Publish column on how one employee provid 1.1.1 Write Publish column on how one employee provid 1.1.2 Publis

This latter single column hierarchy method is appropriate for an Organizational Breakdown Structure (OBS) or a Work Breakdown Structure (WBS).

Name Field Formatting and Recognition

You can format names to be compatible with most HR databases. Names stored as Last, First, Middle Initial can be displayed as First, Middle, Last, or 39 other common formats – without making any changes to the data. These formats will be automatically recognized through the normal import process.

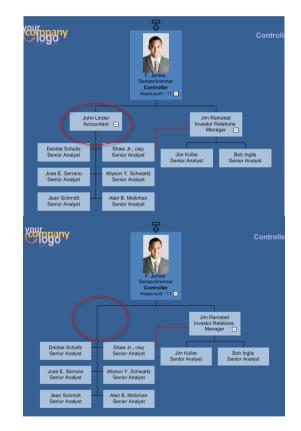
As Typed Last Last Suffix LAST LAST Suffix Last, First	Robert John HAYWORTH Jr
Last, First Suffix Last, F. Last, F. Suffix LAST, First	v

Without changing any data, thi	s:	Can easily be displayed as this:
Jim Powers Acting COO	_	Powers, Jim Acting COO

Appendix A:

Hide Shape

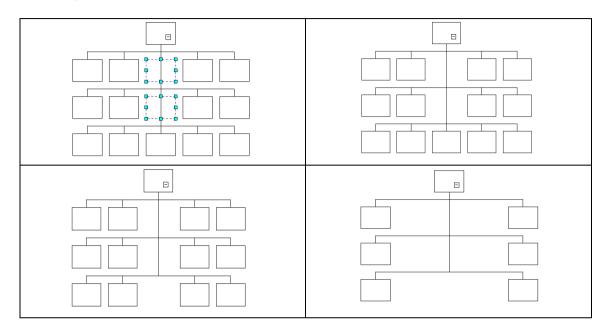
Using the Hide Shape option will prevent the chart box from being seen, however the space that box was taking up on the chart will continue to be occupied. With the ability to hide a shape you can hide the display of a person or create new styles of arrangements.



Here is an example of how the person or shape can be hidden:

OrgChart Professional Interfaces

Here are three examples of how new chart arrangements can be made simply by hiding some boxes:



Different Arrangements Made Using the Hide Box Function

Keep in mind that when using Hide Shape the data still exists in the hidden box and the database, but it simply is not showing on the chart.

Date Fields Support International Date and Time Formats

Any date stored in a chart can be presented in any International date and time format. Formatting selection is available in the Import process, and also through the **Chart / Chart Data Set** menu item.

12/27/2007		Current date/time
12/27/07	-	Thursday, December 27, 2007
12/27/07		4:25:58 PM
12/27/2007		
07/12/27		Locale:
2007-12-27 27-Dec-07		English (United States)
Thursday, December 27, 2007	_	English (United States)
December 27, 2007		English (Zimbabwe)
Thursday, 27 December, 2007	$\mathbf{\sim}$	Estonian
		Faeroese

Importing Dotted Line Relationships

Import and export now handles System Columns, Assistants, Arrangements, Dotted line reporting relationships, and more.

Dotted line relationships are established at the following dialog in the import process:

	nd "Rep column /ee Nam	orts To" columns	ns 🤉 Cha	art Company	by	
1	ed Mani	ager		2 Christina Gillies 2 John Randall		
667 1 175 1 118 1 154 3 156 1	8 7 # 3 1 2 6 2	Position	ame	Reports to	 	
	ployee Payroll Code M 167 1 175 1 118 1 154 3 156 1 201 1	ployee Payroll Code M 20 0 167 18 175 17 118 13 154 30 156 16 201 18 3 4 5 5 5 6 7 7 7 7 7 7 7 7 7 7 7 7 7	Ployee Payroll Code M	ployee Payroll Code M 67 18 175 17 18 13 1 ≧ Employee Name 56 16 2 2 4 5 5 17 18 5 54 30 55 16 2 5 17 5 17 5 17 5 17 5 17 5 18 2 5 18 4 5 5 19 7 18 7 18 1 ≧ Employee Name 7 18 4 5 5 19 7 18 7	Polycee Payroll Code M. I Define Hierarchy Position Reports to 167 16 1 Image: Constraint of the second sec	Polyce Payroll Code M. 20 Define Hierarchy 167 16 175 17 18 13 154 30 16 2 17 18 18 14 19 Employee Name 101 16 4 5 6 7 8

OrgChart Professional Interfaces

System fields are available for import at the next dialog.

🔀 Import Wizard		×
OrgChart		ort Wizard to manually select the importing tables for the will specify the data fields which will be imported.
5	Name Type Employee Payro 1 Numer Imager's ID 1 Numer Imployee Name 2 Name Imager 1 Ext 1 Ext	Manage System Columns Here you can map input fields into the System Columns (or fields). First select the Source Data Column, then select the Destination System Data Column. Finally cick on the Establish Mapping button to link the two fields.
	Surname Text Email Addresses Text Payroll Classifice Text Line of Business Text Org within Line (Text	Source Data Columns: Destination Dãã Columns:
	Manage System columns	Email Addresses GroupID Cassification GroupType Cassification GroupType Gro
		Establish mapping Remove mapping
• [OK Cancel Help

You now have complete control over data imported into your chart and database.

Hierarchical Data Reports

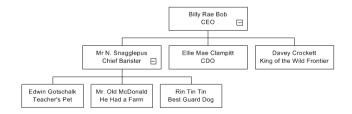
OrgChart creates a new quick tabular view and report of the organization. After your planning exercises the nested outline report shows how the organization is structured and how its people are connected.

Print Next Page Prey	Page <u>I</u> wo Page Zo	oom <u>I</u> n Zoom <u>O</u> ut	<u>C</u> lose		
	Headquarters - Engineering Department				
En ployee_Name	Title	Performance_Rating	Years_In_Position	Salary	
Dan Allen	[Title]	[Performance_Rating]	0	\$55,000.00	
Michael Burnette	CEO	Exceeds	14	\$99,000.00	
Russ Holt	Director of Operations	meets	0	\$55,000.00	
Lou Gagliardi	Design Manager, Expediti	Meets	7	\$55,000.00	
Aaron Vowell	Administrative clerk	Meets	3	\$44,000.00	
Matt Petis	Design Manager, Sequoia	does not meet	6	\$55,000.00	
Rhonda Gasser	VP, Storage	Does not meet	10	\$55,000.00	
Steve Luning	Advanced Engineering	Meets	5	\$55,000.00	
Amanda Twill	Storage Architect	Exceeds	7	\$98,000.00	
Brian Ridder	TSS Support	Meets	6	\$300,000.00	
Rob Nance	Design Manager, Glacier	Exceeds	5	\$55,000.00	
Roy Gilliam	Design Manager, Trio/Kol	Does not meet	3	\$55,000.00	
David Villalanti	Design Manager, Mondec	Meets	3	\$76,000.00	
Greg Vance	Management Trainee	Meets	5	\$150,000.00	
Kim Sung Lee	Administrative clerk	Meets	6	\$150,000.00	
Ashly Gorakpiraia	Administrative clerk	Meets	2	\$300,000.00	

AutoAdjustSize - Automatic Box Sizing

AutoAdjustSize is a powerful new feature that helps you – automatically – create a chart with boxes of uniform size. In previous versions of OrgChart you would have boxes of different size based upon the amount of text you placed in them. If you wanted to make boxes the same size you would adjust them individually or use the Paint Formatter function.

When first creating the chart all boxes automatically become same size.



OrgChart Professional Interfaces

The **AutoAdjustSize** feature makes it easy to build a chart with boxes of uniform size.

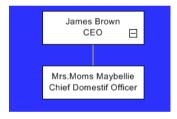
How AutoAdjustSize Works

As you build a chart, a box's size is determined by the amount of data that is entered. In addition, as you add more boxes, their sizes will all automatically adjust to the size of the largest one. This makes creation of a chart with uniform box size easy.

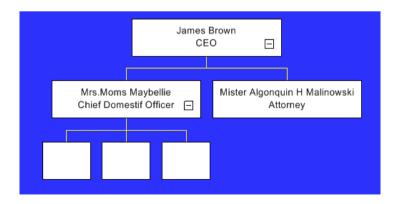
For example here is the first box in the chart:



Next we add another person (reporting to James) with a larger name. Notice how James' box expands to match the size of the new one:



As we add new boxes to a new level they are un-sized until filled.



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Stuart C. Smith

OrgChart's **AutoAdjustSize** will work to optimize the size of boxes at <u>each level</u>. That is why we now see the third level of boxes sizing the same as Stuart's box.

CEO Mrs.Moms Maybellie Chief Domestic Officer Stuart C. Smith

James Brown CEO

> James Brown CEO

Ξ

Ξ

Mister Algonguin H Malinowski

Attorney

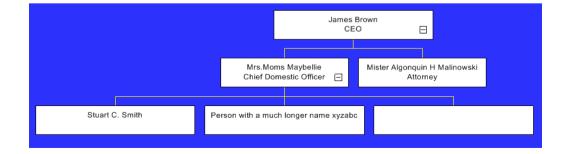
Next, let's give someone a very long name, and watch the sizing that takes place.

Instead, here is what I would have expected... (levels 1 and 2 unchanged, but level 3 maintaining new common size.)

Mrs.Moms Maybellie

Chief Domestic Officer

Person with a much longer name xyzabc



Boxes all expand or contract to match the size of the largest box. You still have the ability to manually control the size of the box, but with **AutoAdjustSize** the chart automatically adjusts to give you a balanced result.

AutoAdjustSize Rules

- 1. **AutoAdjustSize** is turned on by default. You can turn it off for a single box or group of boxes. Look under the local menu under View.
- 2. Using **AutoAdjustSize**, a box size is determined by the length of the longest data field.
- 3. The longest (widest) box determines the size of the others, provided they have **AutoAdjustSize** turned on. Boxes with **AutoAdjustSize** turned off will be skipped in the adjustment calculation.
- 4. Box size may be smaller if Word– Wrap is turned on. To see if Word– Wrap is on, look at the local menu under View. Remember that word wrap works based upon spaces in a character string.
- 5. Paint Formatter has options that can be viewed under special mode. If you are using Paint Formatter the default is **AutoAdjustSize** but you may change it to manual.

OrgChart Professional Interfaces

Options Screen

The **Options** screen is used to set certain global defaults in OrgChart. It is comprised of the **General** and *Default Fields Set* screens. To access the Options screen - go to **File** Tab, then **Options**.

Options Screen – General

This menu is used to set which introductory screens and messages will be displayed (see below).

R	Options	×
General	General	
User Information	Welcome Screen	
QuickInfo Tip	✓Display on application startup ✓ Unfold tips section	
Templates		
Paste Format	Wizard Dialogs	
Chart Decorations	Show Publish Wizard intro page	
Dotted Line Supervisors	Show Export Wizard intro page	
Updates	✓ Show <u>R</u> esync Properties Wizard intro page	
Replace position	Find Dialog	
Logging	Show restart search message	
	OK Cancel Help	

- 1. Tell OrgChart to show or hide pages by checking or un-checking boxes:
 - a. **To display a screen** Check the corresponding box.
 - b. **To hide a screen** Uncheck the corresponding box. The following screens can be set to be displayed or hidden:

2. Welcome Screen:

- a. Display on application startup.
- b. Unfold tips section.

3. Wizard Dialogs:

- a. Show Import Wizard intro page.
- b. Show Publish Wizard intro page.
- c. Show Export Wizard intro page.

4. Find Dialog:

- a. Show not found message.
- b. Show restart search message.

Options screen – Setting default fields

The **Chart Data Set** screen creates global changes that determine which Data Fields will be present in every component in the project (see below).

Name	Туре	Visible	Display name	Formula	Format	New
Name	🧟 Name	\checkmark			0 .00	
Title	Text	✓				Add Predefined
Company	Text	\checkmark				Delete
Photo	🗑 Image					Delete
Division	S Calculated			Σ		Set Title
Supervisor	🖵 Supervisor			Σ		
WBS Code	S Calculated			Σ		
Phone Office	Text					
E-Mail Office	🌐 Link		✓			Move Up
Headcount	Σ Calculated			Σ		Move Down
Team Budget	Σ Calculated			Σ		Move Down
Salary	\$ Currency	\checkmark	✓		-0.00	
Unnamed	Text	\checkmark				
Example	Text	\checkmark				OK
OrgChart Data Field Example	Text	\checkmark				
Unnamed1	Text	\checkmark				Cancel
						Help

For full details on how to use this screen, please see the *Modifying Datafields* – *Default Fields Set* section.

Page Setup Menu

This interface is used to set the paper attributes for your chart (see below). To access this menu, go to **File** tab, **Print**, and select **Chart Page Setup**.

🛃 Page Setup			? X
	 a		
Layout Pages Paper Size: A4	Restore		J
Source: Auto	o Selection		•
		s) 197 Right: 167 Bottom:	0.197
	ОК	Cancel	Help

This screen contains the following:

- 1. **Layout Pages** this button launches the **Layout Print Pages** menu, which is used to set the physical size of the chart by setting how many pages it will be printed out on (for more information on printing multiple page charts, see *Printing multiple page charts* and *Layout Print Pages*).
- 2. **Restore** resets the page defaults.
- Paper area contains options for: 1) Size (allows you to choose from an extensive list of paper sizes and shapes from the drop down menu and 2) Source (sets the paper source. The default is "Automatically select").
- 4. **Margins** area displays the Left, Right, Top and Bottom margins. These can be altered by manually entering new values in the fields for each margin.

OrgChart Professional Interfaces

Pattern

OrgChart provides a suite of patterns which can be applied to components. This catalog is located on the **Pattern** tab of the **Fill Style** menu (pictured below):

8	Fill Style	×
		Apply To:

To Access the Patterns menu:

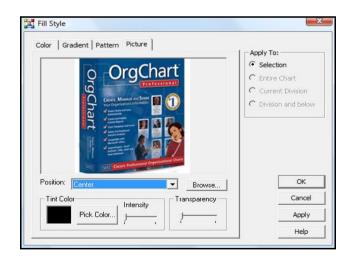
- 1. Select a component or border.
- 2. Do one of the following:
 - a. Go to the Home tab, Fill Style, Fill Effect.
 - b. **Right click** in the chart to launch a pop– up menu. When the menu appears, go to **Format > Border Style**. Once in the **Border Style** menu, click the **Fill** button.
- 3. When the **Fill Style** menu appears, click the **Pattern** tab.

The following options are available for pattern creation:

- 1. **Pattern** each button represents a different pattern which can be applied to the component. Click the button to choose a pattern.
- Color this determines the pattern's foreground and background colors. Click the Foreground and Background fields to launch a palette of colors to choose from.
- 3. **Transparency** these sliders determine the transparency of the colors chosen in the Foreground and Background fields. On the slider scale, the left end equals 100% opacity and right end equals 100% transparency.
- 4. **Sample** this preview window allows you to see your choice before committing it to the on– screen component.

Picture

In addition to gradients and patterns, OrgChart allows you to place pictures on a component. Imagine not just having the name of a friend on your chart, but their photo as well! The possibilities are limitless – and the **Picture** tab on the **Fill Style** menu is where you can make it happen (see below):



Accessing the Picture menu

- 1. Select a component or border.
- 2. Do one of the following:
 - a. Go to the **Home** tab, **Fill Style, Fill Effect**.
 - b. Right click in the chart to launch a pop– up menu. When the menu appears, go to **Format > Fill Style.**
 - c. Right click in the chart to launch a pop– up menu. When the menu appears, go to **Format > Border Style**. Once in the **Border Style** menu, click the **Fill** button.
- 3. When the **Fill Style** menu appears, click the **Picture** tab.

The following options are available for picture import and manipulation:

- 1. **Picture** this preview window allows you to see your choice before committing it to the on-screen component.
- 2. Browse click this button to browse to your picture's location.
- 3. **Style** this drop down menu provides different choices for your picture's orientation and dimensions. They are as follows:
 - a. **Tile** this takes pictures that are too small and repeats them to fill the frame.
 - b. **Flip Horizontally** this flips a picture horizontally.
 - c. Flip Vertically this flips a picture vertically.
 - d. Flip Horizontally and Vertically this creates a mixed flip for an interesting effect.
 - e. **Center** this takes a picture and centers it in the frame.
 - f. **Stretch** this takes a picture that is too small and stretches it to fit the frame (so it doesn't need to be tiled).
 - g. **Clear** this removes the chosen picture (and simultaneously clears the preview window).
 - h. **Tint Color** this area allows the imported picture to be tinted in different hues. It includes:

- i. **Tint Color** this is a tiny preview window that displays the color selected in Pick Color.
- j. Pick Color this opens a palette of available tinting hues.
- k. **Intensity** this is very similar to transparency, except it dictates how strongly the tint color affects the imported picture.
- 1. **Transparency** these sliders determine the picture's transparency. On the slider scale, the left end equals 100% opacity and right end equals 100% transparency.

Report Viewer – Reports

All Report viewing, printing and exporting commands are accessed through the Reports – Report Viewer.

To view Reports:

- 1. Highlight the report's name in the *Existing Report*s window and click the **Report** button:
- 2. The report will be automatically displayed in the Reports Report Viewer (see below).

🙀 OrgChar	t Professional - [OrgChart2]		
Print	Next Page Prev Page Two P	age Zoom In Zoom Out	Close
			Report
Nam	e	Title	Photo
2	OrgChart	Title>	<pre></pre>
2	OrgChart	Title>	<pre>(@ <photo></photo></pre>
2	OrgChart	Title>	<pre>(ii) <photo></photo></pre>
2	OrgChart	Title>	<pre>(i) <photo></photo></pre>
2	Org Chart	Title>	<pre>(@) <photo></photo></pre>
2	Org Chart	Title>	<pre>(@) <photo></photo></pre>
2	Org Chart	Title>	<pre>(@) <photo></photo></pre>
2	OrgChart	Title>	(j⊚ <photo></photo>
2	OrgChart	Title>	(j⊚ <photo></photo>
2	Org Chart	Title>	(j⊚ <photo></photo>
2	OrgChart	Title>	<pre>(ii) <photo></photo></pre>
2	OrgChart	Title>	(ii) <photo> ▼</photo>
			•
Page 2	Chart Normal View 0	utine Pane Mode: All records	Persons in chart: 60

To access all printing options in the Report Viewer:

1. Left mouse click the **Report** button in the top left corner of the Report Viewer. A list of options will appear (see below).

Report	
Print	
Print Setup	
Print Preview	
Export 🕨	Excel
Close	1

- 2. Choose from the following printing options:
 - a. **Print** launches the standard Microsoft Windows Print interface.
 - b. **Print Setup** launches the standard Microsoft Windows Print Properties interface.
 - c. **Print Preview** launches the OrgChart Print Preview screen (for more details, please see the Print Preview section).

(Note: Print, Print Setup and Print Preview follow all standard printing conventions outlined in Chapter 3: Printing.)

To export a Report from the Report Viewer:

- 1. Left mouse click the **Report** button in the top left corner of the Report Viewer. A list of options will appear (see above).
- 2. Choose **Export > Excel**.

Wizards

OrgChart has a variety of wizards to streamline importing, exporting, publishing and report generation. The following is a listing of the main interface for each. To launch the Export Wizard go to the **File tab** and select **Export**.

Export Wizard

Exporting is the process of saving OrgCharts in formats that can be opened and utilized by other programs. In OrgChart, this is done through the Export Wizard. The wizard can export to the following formats:

- 1. Comma Separated Values (CSV) File.
- 2. Microsoft Excel File.
- 3. XML Document (OrgChart Schema).
- 4. OLE DB DataSource.

The export process is almost identical for all these formats. The only exception is during the path selection phase, which appears on the third screen of the Export Wizard. At that stage, Excel and OLE DB DataSource have a different selection process. Once selection is complete, the rest of the wizard process is identical for all formats.

Export Wizard – Export Selection screen

This screen offers the following export options (see below).

8	Export Wizard	×
OrgChart	In this step choose the destination to where the data will be exported. Note: Depending on your choice, the steps for each export will look a bit different. Microsoft Excel Comma Separated Values (CSV) File Comma Separat	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	

Click in a radio button to choose one of the following:

- 1. Microsoft Excel File
- 2. Comma Separated Values (CSV) File
- 3. OLE DB DataSource
- 4. XML Document (OrgChart Schema)
- 5. Microsoft SQL Server
- 6. Oracle
- 7. Microsoft Access
- 8. Microsoft Project
- 9. Microsoft SharePoint Server

To complete this screen, choose one of the following options:

- 1. **Back** return to the previous wizard screen.
- 2. **Next** proceed to the next screen.
- 3. Cancel close the wizard without saving and return to the Main Work area.
- 4. **Help** launch the OrgChart **Help** system.

For a detailed, screen-by-screen walkthrough of the export process, please see *Exporting charts with the Export Wizard*.

Import Wizard

The Import Wizard is designed to take the user step– by– step through the import process. At each stage, the wizard will request information to be entered onto a page, then proceed to the next screen through the use of **Next** buttons.

To open the Import Wizard – go to the **File** tab, **Import**.

Import Wizard overview

The wizard uses the same basic system to import all six formats. Although certain formats have unique screens for entering more technical settings, they all have the following in common:

- 1. All formats begin the wizard the same. They all start with: 1) the introduction screen and 2) a page to select the import format.
- 2. All formats finish the wizard the same. They all end with a Finish screen.
- 3. All formats use the same basic navigation buttons. Most pages have Back, Next, Cancel and Help buttons at the bottom of the screen to move back and forth through the wizard.

Importing Tips:

- The data you intend to import must have a hierarchical structure for the import to succeed.
- Until the final (**Finish**) screen, you can move back and forth through the wizard to change your choices before you commit to the final import.

Import Wizard – Import selection screen

This screen offers the following import options (see below):

8	Import Wizard	×
OrgChart	In this step you will use the Import Wizard to choose from where the data will be imported. Note: Depending upon your choice other steps of the Wizard will be looking differently.	
	Microsoft Excel File	-
Mar I	Comma Separated Values (CSV) File	
Went	Microsoft Dutlook Contacts	
Vord	OLE DB DataSource	
Excel	 Lightweight Directory Access Protocol (LDAP) DataSource 	
Excel	XML Document (OrgChart Professional Schema)	
	O Microsoft SQL Server	
XML	⊖ Oracle	
XML	O Microsoft Access	
	O Microsoft Project	
CSV	🔿 Microsoft SharePoint Server 🛛 🔁	
	◯ TAB delimited text files	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	2

Click a radio button to select which format to import. Choose from the following:

- 1. Microsoft Excel files.
- 2. Comma Separated Values (CSV) files.
- 3. Microsoft Outlook contacts.
- 4. OLE DB DataSource.

- 5. Lightweight Directory Access Protocol (LDAP) DataSource.
- 6. XML Document (OrgChart Schema).
- 7. Microsoft SQL server
- 8. Oracle
- 9. Microsoft Access
- 10. Microsoft Project
- 11. Microsoft SharePoint Server
- 12. TAB delimited text files

For a detailed, screen-by-screen walkthrough of the import process, please see the *Import Wizard* section.

Publishing Wizard

Publishing is a powerful process which exports certain file formats, then can immediately open up the associated program and display the results. (For example, if you publish an OrgChart to MS Word, the chart would be saved in MS Word format and then Microsoft Word would automatically load and display your chart.)

Publishing Wizard – Publishing selection screen

₿ Publish Wizard × Select the destination application that you want to publishing to. O Interactive PDF 8 Microsoft PowerPoint ○ Web Pages HTML5 Flash 🔘 Image File 6 Microsoft Word Microsoft Visio OrgChart Now - Cloud OrgChart < Back Next > Cancel Help

This screen offers eight publishing options (see below).

Click in a radio button to select which format you want your chart to be published in. Choose from the following:

- 1. Interactive PDF
- 2. Microsoft PowerPoint
- 3. Web Pages HTML5
- 4. Flash

- 5. Image File
- 6. Microsoft Word
- 7. Microsoft Visio
- 8. OrgChart Now Cloud

Note: The Publishing Wizard incorporates the same essential workflow for all supported formats but some formats use different screens and a slightly different sequence. For a detailed, screen-by-screen walkthrough of the publishing process, please see the Publishing Wizard section.

Report Wizard – Reports

Reports are pragmatic, graphically simple reports usually produced for in– house informational purposes. To start the Wizard go to the **Data** tab, **Reports**. The **Report** wizard will appear (see below).

Report	×
The report function will allow you to output any of the data contained in the OrgChart Professi can create new report formats and afterwards save them. Choose from existing "Existing Rep if you are just starting.	
Where you have an existing report, the "Fields Selected For The Report" and "Criteria To Film in view.	er Report Data'' will be
Existing Reports:	
OrgChart Report 1 - Chart 1 OrgChart Report 2 - Chart 1	New
	E dit
	Delete
	Printer Setup
Fields Selected For The Report: Name Title	View Report
indite, nos	
-	Export to Excel
Criteria To Filter Report Data:	_
	Close
-	Help

To start a new report click **New**. To view a report, click **View Report**. For a detailed walkthrough of the publishing process, please see the *Reports* section.

Appendix B: Glossary

Add Print Page

Press to add a new print page.

Add Shape...

Press to add a new shape on the work area. (If you select another shape prior to this, the new shape will be a subordinate of the first one.)

Arrange Print Pages

Press to arrange print pages on the screen in such a way to cover the entire chart.

Arrange Subordinates...

Press to arrange subordinates into logical patterns. (*Note: the parent component must be chosen or this function will not become active.*)

Auto arrange Components

Press to automatically arrange components into logical patterns.

AutoTexts

Boxes with the words Chart & Division which can be dropped on to chart levels. To change **AutoTexts**, go to **Division View**, highlight a division level and press **F2**.

Border Style...

Press to call the Border Style menu. This controls all the border characteristics of a selected component.

Box Item Menu

A menu which displays a component's data field information.

Cascade

Click this item to make all windows cascade on the screen.

Change Page Orientation

Press to toggle the selected page orientation between portrait and landscape.

Chart Design Palette

This menu contains tools for working with charts.

Close

Press to close the active project. If there are unsaved changes, the program will prompt you to save them before closing.

Columns Intelligent Sort

Mark this item to maintain the relationship between the data fields order on the **Data Properties** panel and their order in the **Data Outline View** table. Moreover, adding a new properties field within the **Data Properties** panel (for any component) will produce the new column in the **Data Outline View** table. (*Note: changing the column order in the Data Outline View table cancels this mode.*)

Connector Style...

Press to call the Connector Style menu. This controls the appearance of both Dynamic Connectors and the connectors belonging to individual components.

Сору

Press to make a copy of the selected data. The data will be stored in the clipboard.

Create Report...

Press to call a wizard that will guide you step- by- step through the report creation process.

Customize Data Outline View Columns

Press to call up the **Data Outline View** customization menu. From here, you can set data field visibility and arrange data field order.

Cut

Press to place the selected item into the clipboard. (The item will disappear from the project area.)

Appendix B:

Data Outline View

Press to display the **Data Outline View** on the screen. This table displays every chart component, their associated data fields and their relationships to each other.

Data Properties...

Press to call the special Data Fields dialogue corresponding to the selected component.

Delete

Press to delete the selected object (component or text).

Delete Print Page

Press to delete the selected print page.

Disconnect From Parent

Press to disconnect the selected component from its parent.

Divisions

Sub-groups and sub-charts used to break up (and simplify) large charts.

Division View

A tabbed section in **Data Outline View** that displays a simplified hierarchy of subgroups and sub-charts.

Drop Shadow

Press to place a drop shadow on all selected components. The **Drop Shadows** function is used to give a component a three dimensional feel.

Edit

This will display the edit tools and provide access to the program's setup.

Email Chart...

Press to email the chart. Your default email program will launch and the chart will appear as an attachment.

Appendix B:

Exit

Press to close the program.

Export

Press to export a project's data to different formats.

Field Hidden

Press this to hide a data field from the selected cell in **Data Outline View**.

File

Under this menu you can find essential tools related to general program options.

Fill Style...

Press to call the **Fill Style** dialogue. From here, you can control a variety of component properties including: color, gradient, pattern and photo.

Find...

Searches all components. Also allows the user to define additional search filters.

Find Next

Press to find the next item which meets your search criteria.

Fit to Window

Press to resize the work area to match the screen size for maximum overall visibility.

Font Style...

Press to call the Font Style dialogue. This controls all aspects of font control.

Full Screen

Press to expand the work area to fill the entire screen.

Help

Use this menu to launch OrgChart Help.

Hide Background

Press to toggle the current background between hidden and visible.

Hide Shape

Press to hide the selected components from the screen. (*Note: the data fields of hidden items are still displayed in areas such as Data Outline View*.)

Hide Subordinates

Press to hide all of a chosen component's subordinates. (*Note: the parent component must be chosen or this function will not become active.*)

Import

Displays a list of available import formats. Once you choose a format, OrgChart will convert the other program's file so it can be read (and displayed) within the program. (Note: if necessary, OrgChart will launch an appropriate Import Wizard to guide you through the import process.)

Move Subordinates

Place the cursor over this item and choose an appropriate move direction:

- 1. Left/Up. Moves the selected component to the left in the object tree within one level.
- 2. Right/Down. Moves the selected component to the right in the object tree within one level. (*Note: the parent component must be chosen or this function will not become active.*)

New

Press to create a new project. The new work area will appear on the screen. To switch between work areas go to the Windows menu and choose an appropriate area from the corresponding menu.

Normal View

Press to return the program to the **Normal** view mode. In this mode, you can work with components independent of which print page they are on.

Appendix B:

Open

Press this item to open an existing (previously created and saved) project.

Options screen

Set OrgChart General and Data Fields Set options (makes global changes).

Page Background...

Press to launch a menu where you can select and apply a background to the chart.

Paste

Press to place items (cut or copied) on the clipboard into the project area. You can use this function to connect components. To do so, select a parent component on the work area and paste the copied/cut component on top of it. When the pasted component appears, it will be connected to the parent.

Print...

Press to print your chart. Before printing, you will be prompted to confirm printing options in the standard Microsoft Windows dialogue box.

Print Layout View

Press to turn the program to the **Print Layout View**. In this mode, you can prepare your chart to print arranging it on print pages of your choice.

Print Preview

Preview mode lets you can check the appearance of your document before printing. Documents can also be printed directly from the **Print Preview** window.

Print Setup...

Press to launch the standard Windows Print Options dialogue box.

Publish

Press to publish (export and display) the project.

Appendix B:

Redo

Press to cancel the previous undo action. (This essentially "un-does" undo.)

Save

Press to save all changes in the project.

Save as...

Press to choose a new destination and name for the project you are saving.

Select All

Press to select all the components in the work area.

Shape

This menu provides a list of aesthetic shapes which can be applied to components.

Shape Style

Press to call a menu where you can select a new style for the selected component.

Show Grid

Press to superimpose a reference the grid over the work area. (*Note: although the grid is visible on the screen, it is never printed out.*)

Show Rulers

Press to display rulers at the top and left side of the screen.

Snap to Grid

Press to make components snap to grid coordinates (this is good for precision work).

Sort the List

Place the cursor over this item to choose Ascending or Descending order for the **Data Outline View** data fields.

Status Bar

Select this to show the narrow information bar at the bottom of the screen.

Text Align

Place the cursor over this menu to choose a component's text alignment (left, right, centered, etc.).

Tile

Click this item to tile the screen with windows.

Toolbars

Mouse over this menu to choose the toolbar you wish to hide or make visible:

- 1. Arrange displays the tools for automatically arranging components.
- 2. Format displays various font modification tools.
- 3. Arrange Subordinates –tools for automatically arranging subordinate components.
- 4. **Box Item** shows data fields associated with the highlighted component.
- 5. Chart Design presents all the items necessary for complete chart creation.
- 6. Main Toolbar contains essential OrgChart settings and options.
- 7. Select View presents tools for changing view and component modes.
- 8. Themes a drop down menu where different Themes can be chosen.
- 9. **Show Level** drop down menu providing different chart levels.
- 10. **Zoom** displays the magnification tools.

Undo

Press to cancel the previous action.

View

Toggles between Normal and Print Layout View modes.

Appendix B:

Window

Under this menu you can find tools to arrange windows on the screen.

Zoom In

Press to zoom in (increase magnification).

Zoom Out

Press to zoom out (decrease magnification).

Appendix C: Hot Keys

You can access useful program features and actions via shortcut hot keys.

Shortcut	Action
Ctrl+N	New chart
Ctrl+O	Open chart
Ctrl+S	Save project
Ctrl+Y	Redo
Ctrl+Z; Alt+Backspace	Undo
Ctrl+A	Select All
Ctrl+X: Shift+Del	Cut
Ctrl+Ins; Ctrl+V	Past
Del	Delete
Alt+Enter	Data Properties
Alt+=; Alt++	Zoom In
Alt+	Zoom Out
Alt+Ctrl+A	Arrange Subordinates
Ctrl+F	Find
F3	Find Next
Alt+A	Add Component
Ctrl+F	Find

Working with components on the work area can be done by using key combinations. It is assumed one component is selected on the work area.

Shortcut	Action
Arrow keys	Navigate chart
Ctrl+	Collapse branches
Ctrl++	Unroll branches
Ctrl+Down Arrow	New component the level below
Ctrl+Right Arrow	New component the same level

Component Shortcuts

Appendix D: Contacts

We value you as our customer. Please visit us online at http://www.officeworksoftware.com for additional tips, tutorials and the latest events in the OrgChart world.

Please refer to the following links for OrgChart- related information and support:

- 1. Homepage http://www.orgchartpro.com
- 2. Technical support http://www.orgchartpro.com/orgchart-faqs.aspx

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