



OrgPublisher Formatting

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Format Organizational Charts

When data is brought into OrgPublisher, a default format is applied, a basic black and white chart. Only one style exists in the chart, Normal. Custom field data does not display in chart boxes until you define and assign the fields. See the Custom Fields document on the Web page.

Any custom position types you bring in are not defined (see Position Type document), and special formatting is not applied.

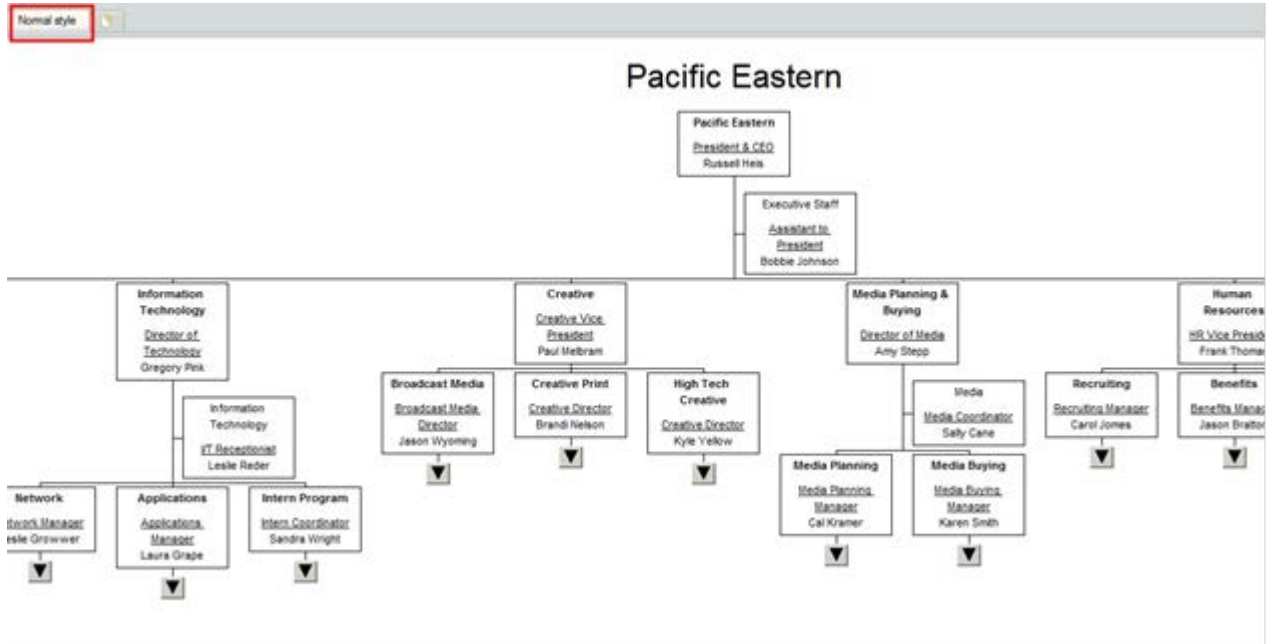


Figure 1.

As the chart administrator, this is where you make the chart more serviceable for your users. You choose what data displays, how it displays, what it looks like when it displays, and where it displays. You can customize colors to follow your corporate guidelines.

If you publish to multiple audiences who need the same data but the data must be presented in the chart or separate view differently, you can achieve this through formatting.

One OrgPublisher chart can contain many different styles applied to the same data. If one audience needs to see the phone number field displayed in the chart box, but another audience should not have access to the phone number, you can create two styles in the same chart to meet both audience needs.

Create a Style

A style is a collection of all formatting choices you make. Styles can be created in one of two ways.

First method

The *Style Wizard* dialogs guide you through the creation of new styles.



Figure 2.

You can also start the *Style Wizard* by clicking the New Style Wizard tab.

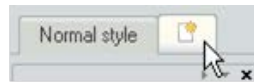


Figure 3.

Second method

Select **File** from the menu then **Styles** from the options list to open the *Styles* dialog.

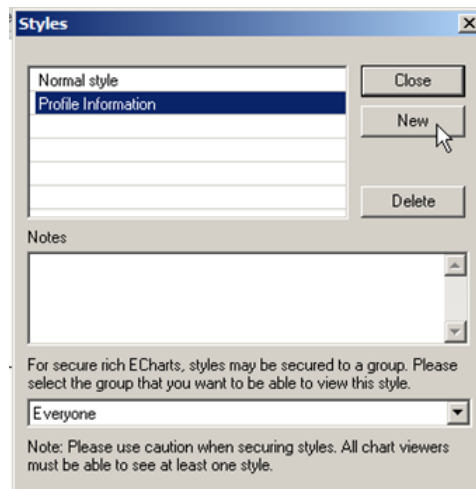


Figure 4.

- Select a style and click **New** to create a copy, then type your own name for the new style.
- Select a style and click **Delete** to remove it.
- Select a style and type comments in the Notes section.
- If groups, other than **Everyone**, exist in the style and you are publishing as an EChart, you can secure the style for use by one group only.

Style List Selector

OrgPublisher displays available style with tab across the Styles toolbar or from a drop-down list of styles.

The tabbed styles include the last tab to open the New Style Wizard. The styles list can be accessed via a drop-down arrow or you can pin the open list to the OrgPublisher window.

Tabbed View



Figure 5.

The last tab contains the New Style Wizard button. Published charts do not contain this tab.

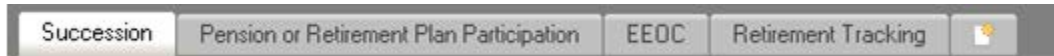


Figure 6.

Styles List View

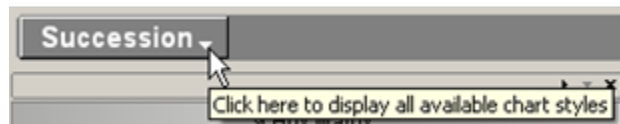


Figure 7.

Once the *Styles View* is open, click the pin button to anchor the view in the select chart style.

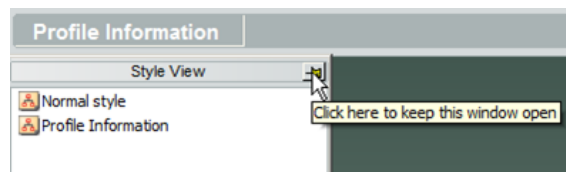


Figure 8.

Instant Formatting with Chart Design templates

These design templates instantly apply formatting to brand new charts, or enhanced formatting to existing charts. If you switch style or create a new style, you can apply a second template to the style.

Apply a Chart Design Template to a New Chart

1. Start the *Style Wizard* and click **Next**.
2. Select the **New Style** radio button and click **Next**.
3. Type the Style name and select the option to **Use this wizard to create a new style**. Click **Next**.
4. Choose **Selecting a chart design template** and click **Next**.
5. Scroll through the thumbnail options and select a window layout for the style. Click **Next**.

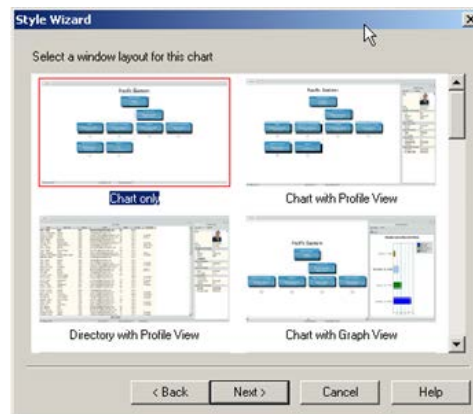


Figure 9.

6. Choose the chart view format and click **Next**. Click **Finish**.

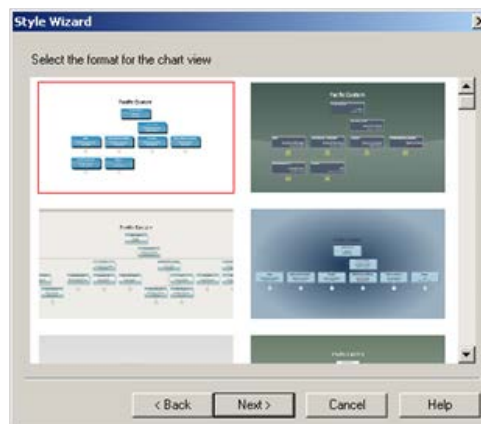


Figure 10.

Apply a Chart Design template to an Existing Chart

1. Open the chart and style.
2. Click the Chart Design Templates button in the toolbar.



Figure 11.

3. Scroll through the thumbnails and select the layout you want. Click **OK** to apply.

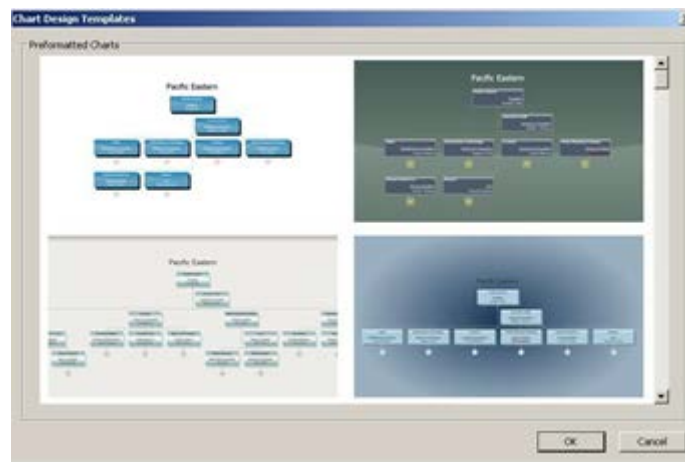


Figure 12.

Format Menu

You can access the *Format* dialog containing several tabs to help you format your chart and data.

1. Select **Format** from the menu and then an attribute you want to format, such as **Text**.

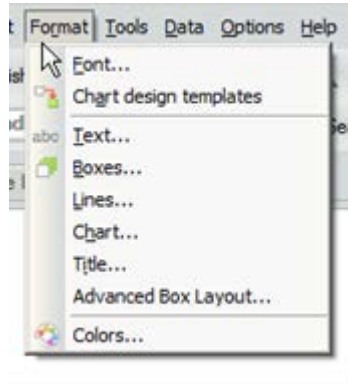


Figure 13.

Tab options are:

- [Text](#)
- [Boxes](#)
- [Lines](#)
- [Chart](#)
- [Title](#)
- Advanced Box Layout

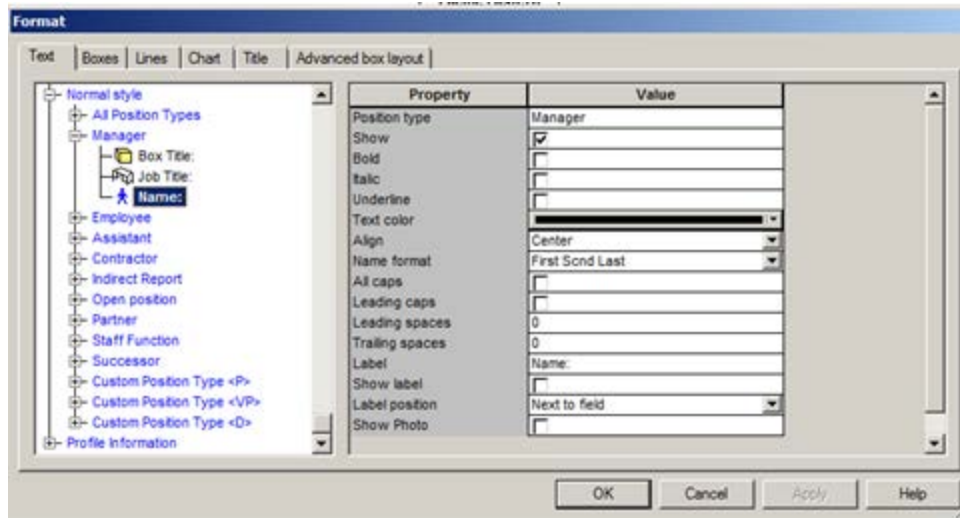


Figure 14.

2. After making your changes, click **OK** to save the change and close the dialog, or click **Apply** to save the change and keep the dialog open.

Format Boxes

You can define the following for each position type or all position types.

- Style
- Height
- Width – set for the whole chart and applied to each position type when modified
- Box outline – can display outline or not, and set the outline width
- Background, shadow, and outline colors
- Gradients
- Group icon display

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

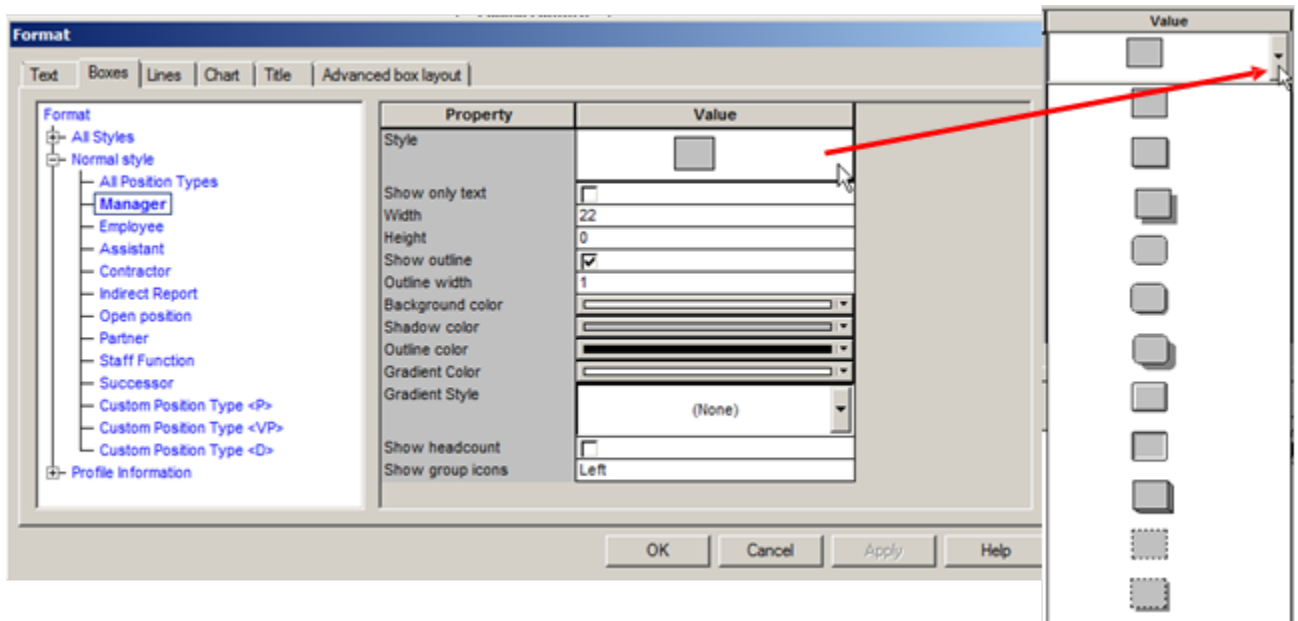


Figure 15.

Format Text

You can select which box element and associated custom fields you want to modify for each position type. The following options can be modified

- Show or hide
- Bold, italic, underline, color
- Alignment
- All caps or leading caps
- Leading and trailing spaces
- Label name, show or hide, placement

- Show or hide photo

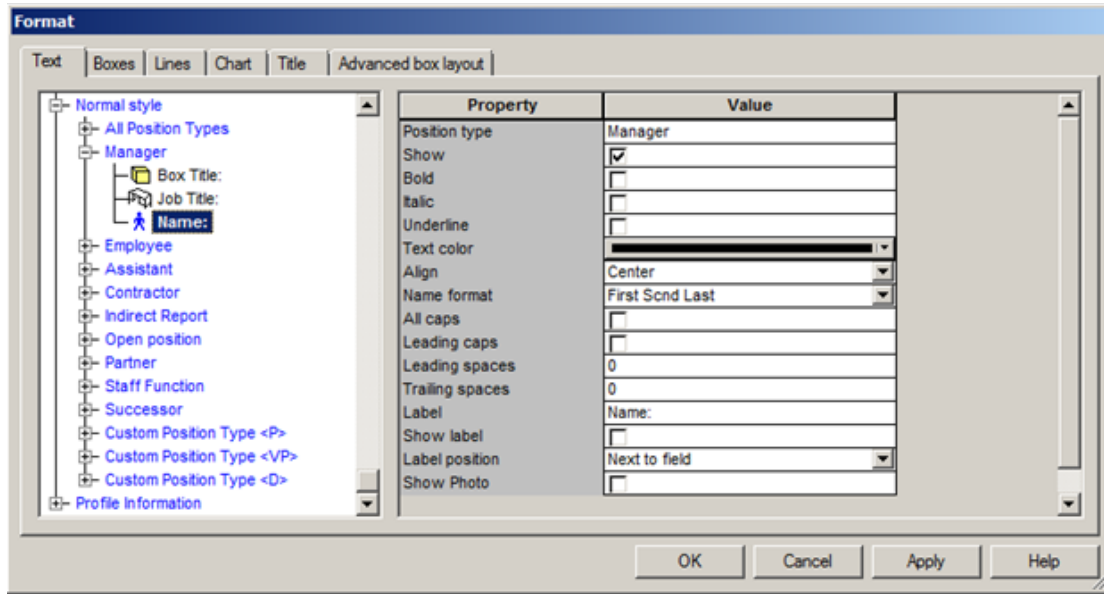


Figure 16.

Format Lines

You can format the connecting lines for each position type or for all position types. The following options can be modified:

- Style
- Width
- Color

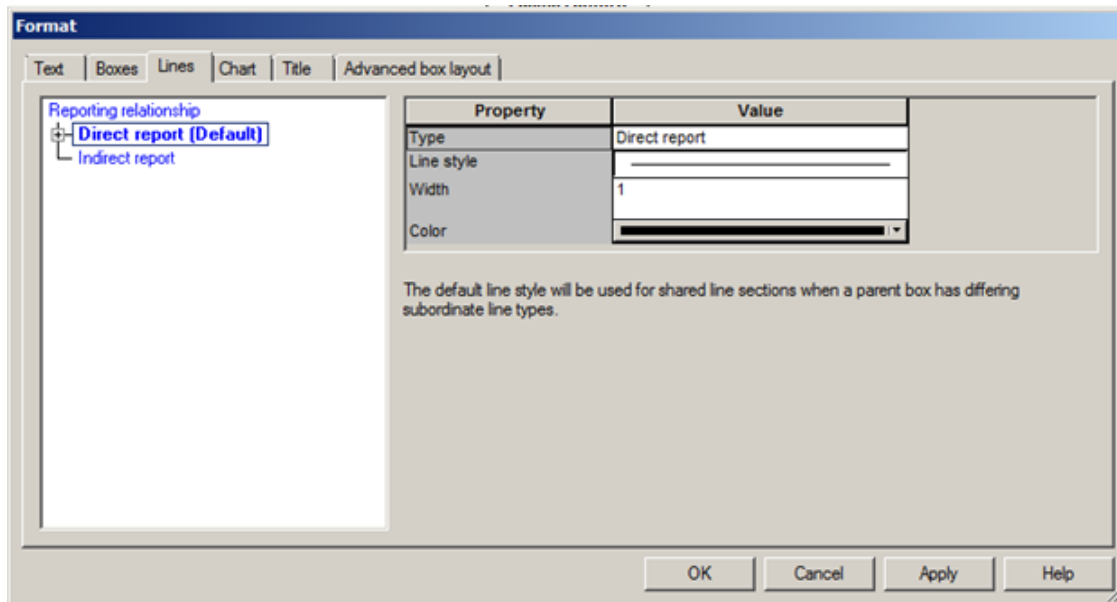


Figure 17.

Format the Chart

You can select background color and gradient, drill button type, Auto Build, and more. The following options can be modified:

- Box layout applies to the configuration of the lower level of chart boxes shown
- Background color, gradient, style
- Background image, and whether or not to print it
- Display multi-report icon, choice of icon
- Auto Build – choose, everyone listed in their own box, all employees in a box below the manager, or manager and employees in the same box
- Box spacing – horizontal and vertical
- Drilling button modification
- Chart font and size
- If chart layout 1, 2, or 3 is selected:
 - Align top of boxes
 - Hide lowest level boxes
- If chart layout 4 is selected:
 - Automatic row size option – how many boxes across based on user window size
 - Boxes per row – control the number of boxes across
- Enable Hover Profile and how long to wait for display

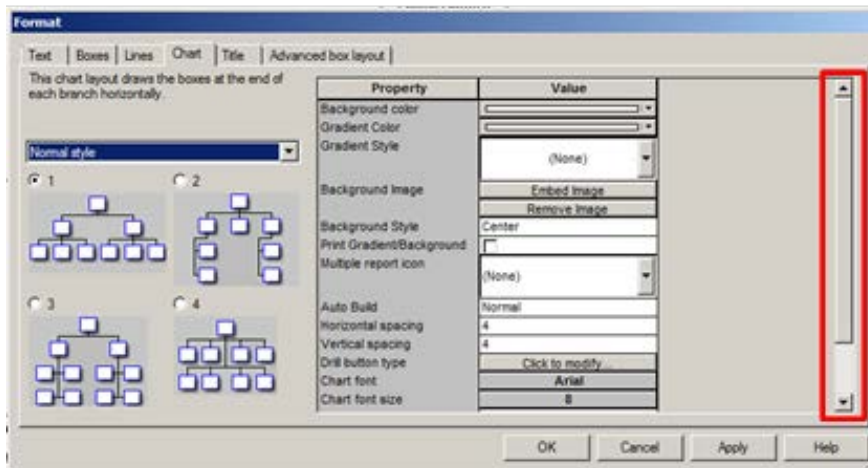


Figure 18.

Chart Box Layouts from the Toolbar

You can also select chart layouts using the toolbar button, both in the application and the published chart.

1. Click the Select the layout style for this chart button.

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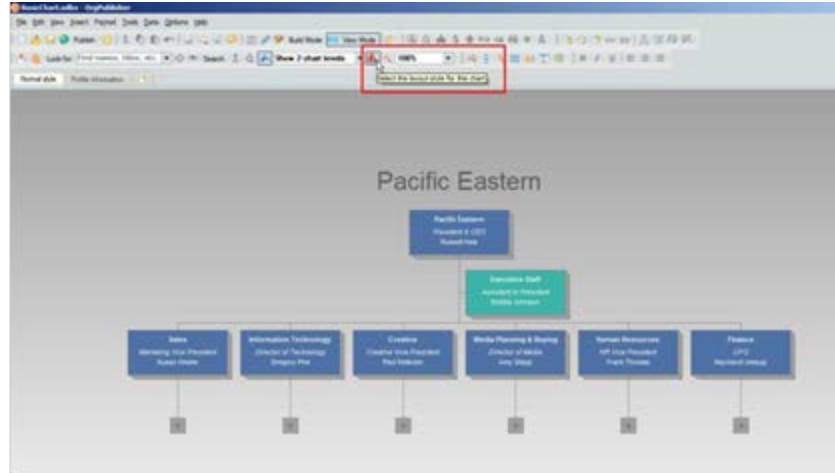


Figure 19.

A drop-down list displays thumbnail options, with the current layout selected. In this example, layout 1, horizontally represented lowest level boxes, is the current selection.

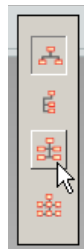


Figure 20.

2. Select the layout you want to use. In the above example, layout 3, side-by-side vertical boxes is selected. The chart dynamically changes the layout.



Figure 21.

Chain of Command Layout from the Toolbar

To display a selected person's chain of command:

1. Select a person's chart box.

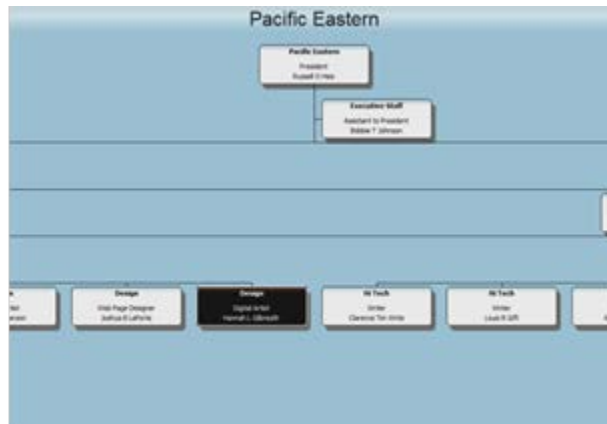


Figure 22.

2. Click the Chain of Command button in the toolbar.

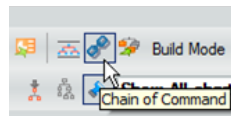


Figure 23.

The chain of command for the selected person displays in the chart.

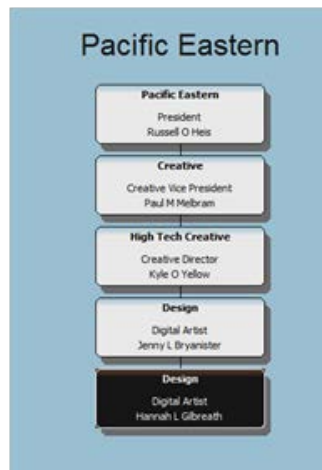


Figure 24.

3. Click the Chain of Command button again to return to the normal chart view.

Background Image and Gradient

The example below uses a company name-confidential image that is tiled across the chart. This image also uses a gradient.

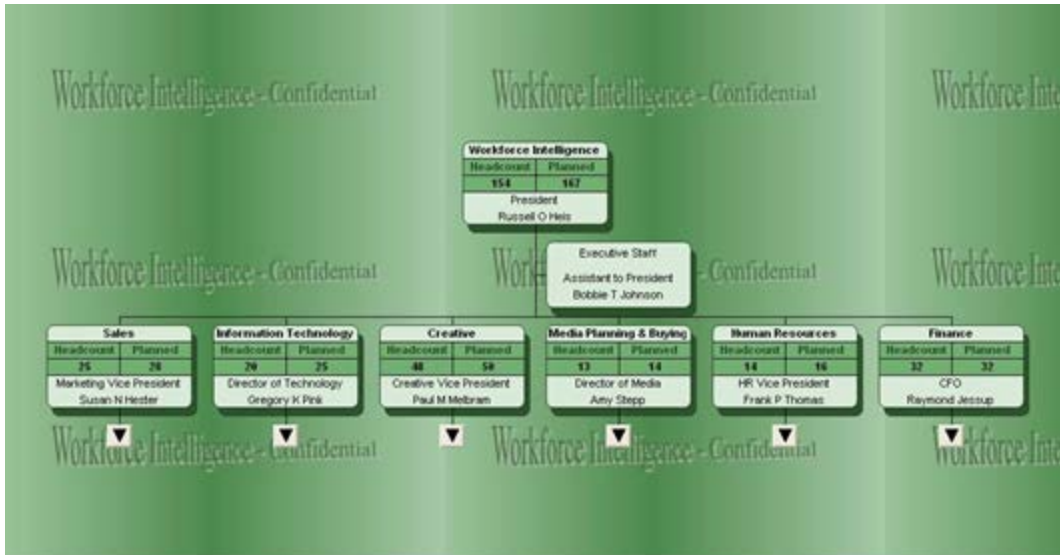


Figure 25.

Chart Box Gradients

The chart boxes below show several available gradient options.

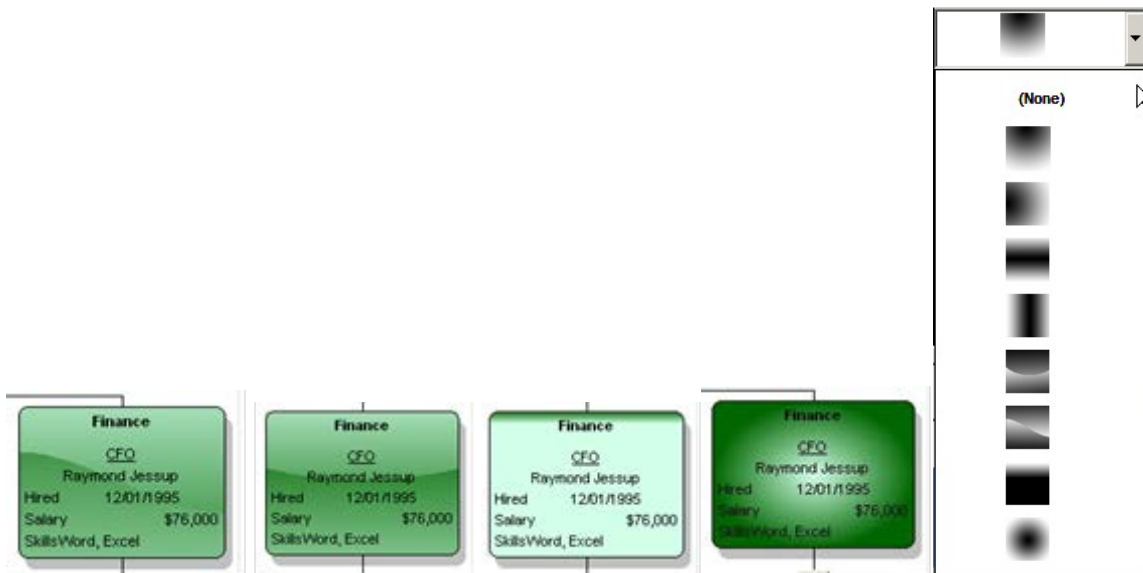


Figure 26.

Format Chart Title

You can show a title, use a custom or auto title, and define the format of the title. Auto Title uses the box title of the top box in the current chart view. You can also add an AsOf date and format.

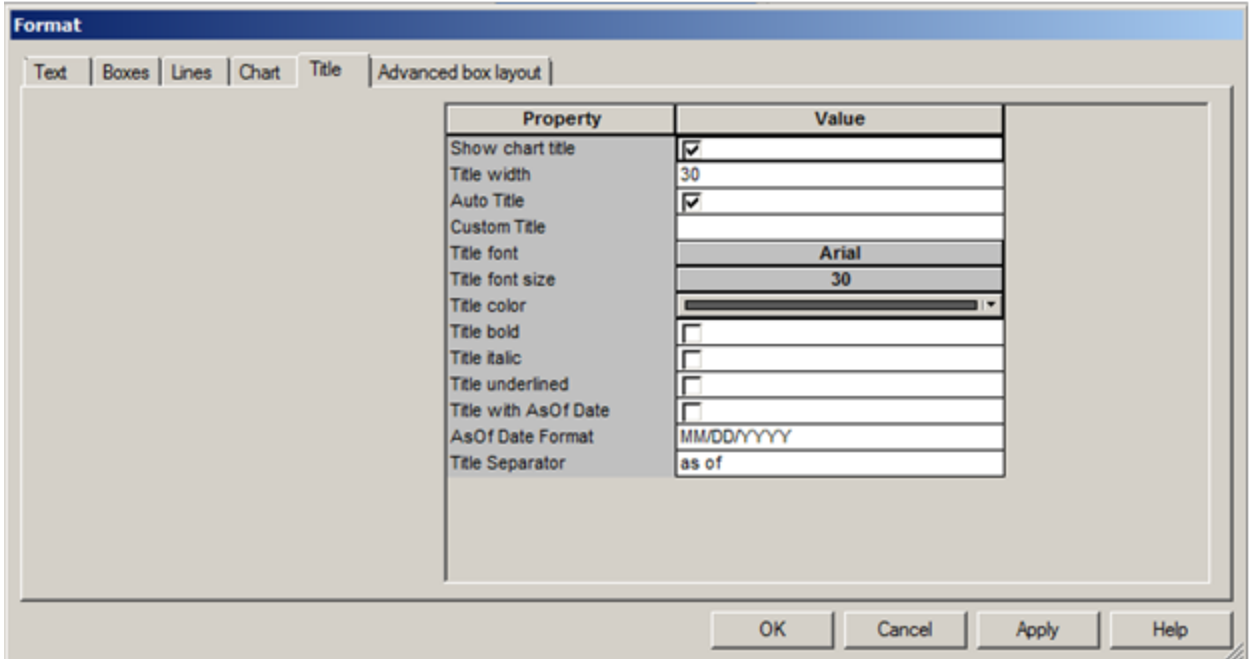


Figure 27.

Levels and Drilling

Example of drilling turned on, as well as the arrows used in the chart:

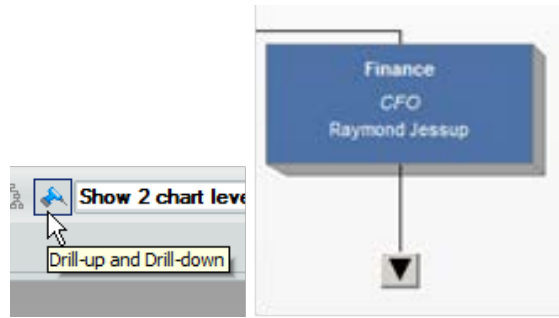


Figure 28.

Example of levels – set as two chart levels to display:

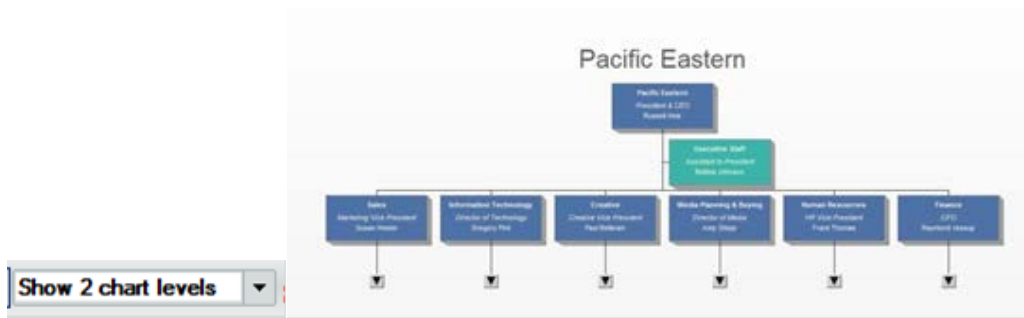


Figure 29.

Example of changing the levels to display:

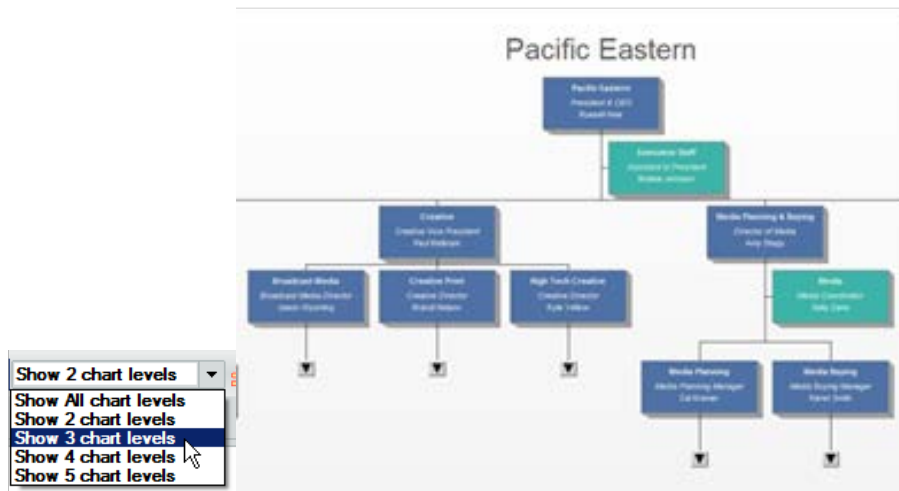


Figure 30.

You can also choose to display all levels below a selected top of chart.

Set Top of Chart

1. Place the mouse cursor at the top edge of the box you want to make the top of chart and click to select the box and all of its reporting boxes.

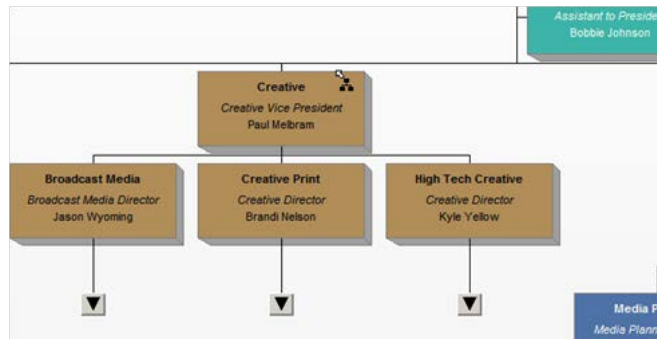


Figure 31.

2. Click the Set Top of Chart button in the toolbar.

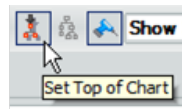


Figure 32.

In this example, the Creative Department becomes the top of the chart.

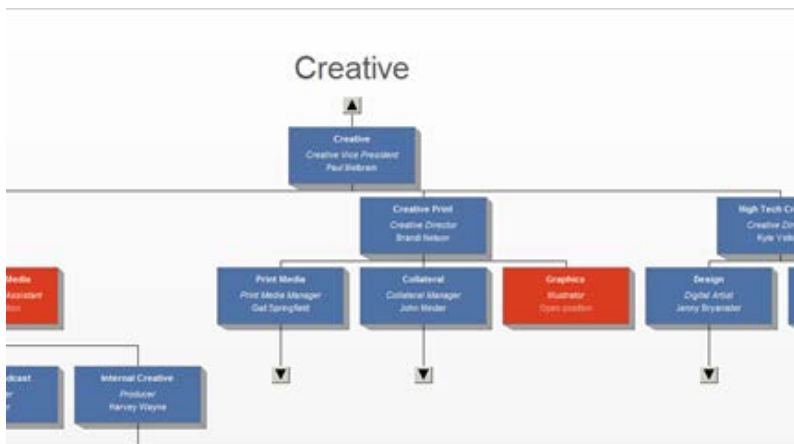


Figure 33.

3. To return to the original whole chart, click the Display Whole Chart button in the toolbar.

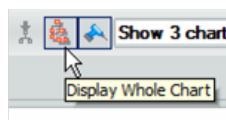


Figure 34.

Synchronize Navigation between Styles

If activated, this feature allows end users who navigate to their own box in the chart to automatically go to their own box again when they switch styles.

The synchronization setting, if enabled, overrides the top of chart setting.

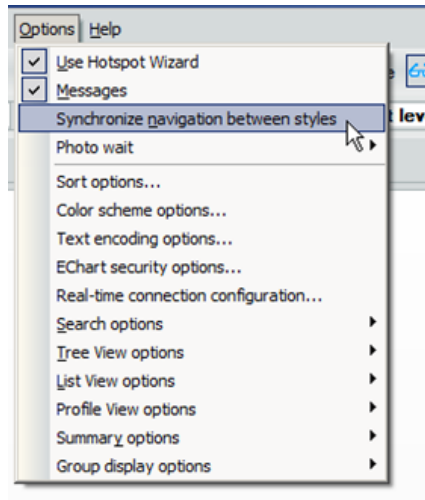


Figure 35.

Show/Hide Chart Components

The display of data in chart boxes is controlled using the show/hide feature.

1. Click the Show/hide chart components button in the toolbar.

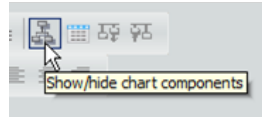


Figure 36.

2. Select the style you want to modify. The current style is selected by default.

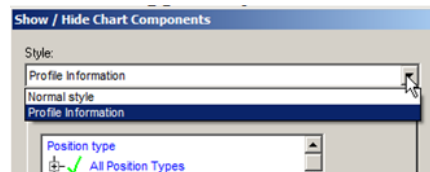


Figure 37.

3. Click the plus (+) button adjacent to a specific **Position type** or **All Position Types**, then click the plus button adjacent to the attribute you want to show or hide.

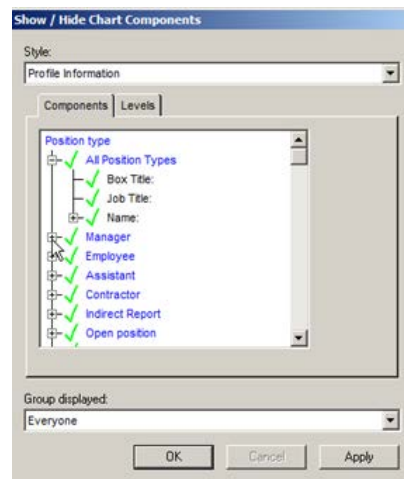


Figure 38.

4. Click to select the fields you do not want to display in the chart. A red **X** indicates the attribute will not show in the chart. A green check mark indicates that the attribute will appear in the chart.

Note: If Advanced Box Layout is used in a style, selections made here do **not** override those settings. See the Advanced Box Layout document for detailed information.

Enhanced Drill Buttons

1. Select **Format** in the menu then **Chart** from the options list.
2. Click the **Click to modify** button in the **Value** column. The *Customize Drill Buttons* dialog opens.



Figure 39.

3. Select the **Use custom drill buttons** check box.

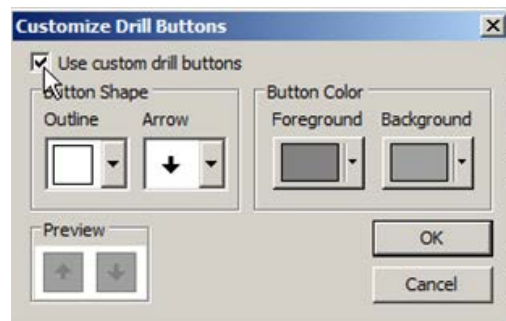


Figure 40.

4. Click to select the:
 - **Outline** shape
 - **Arrow** shape
 - **Foreground** color
 - **Background** color
5. Click **OK** to complete the changes. Click **OK** again to save the changes and close the *Format* dialog.

Open the Chart for Formatting Only

1. Select **File** to open the OrgPublisher dialog.
2. Select an .ocb chart file and then select the **Open for formatting only** check box. Click **OK**.

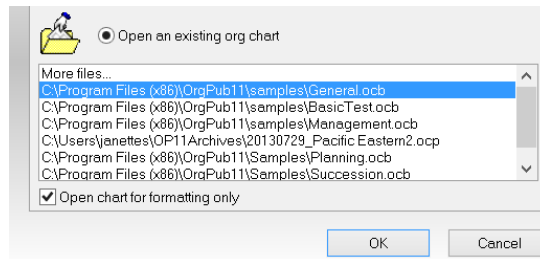


Figure 41.

All formatting is brought into the open chart, one box representing each Position Type is also shown. No data changes are allowed in the formatting only feature.

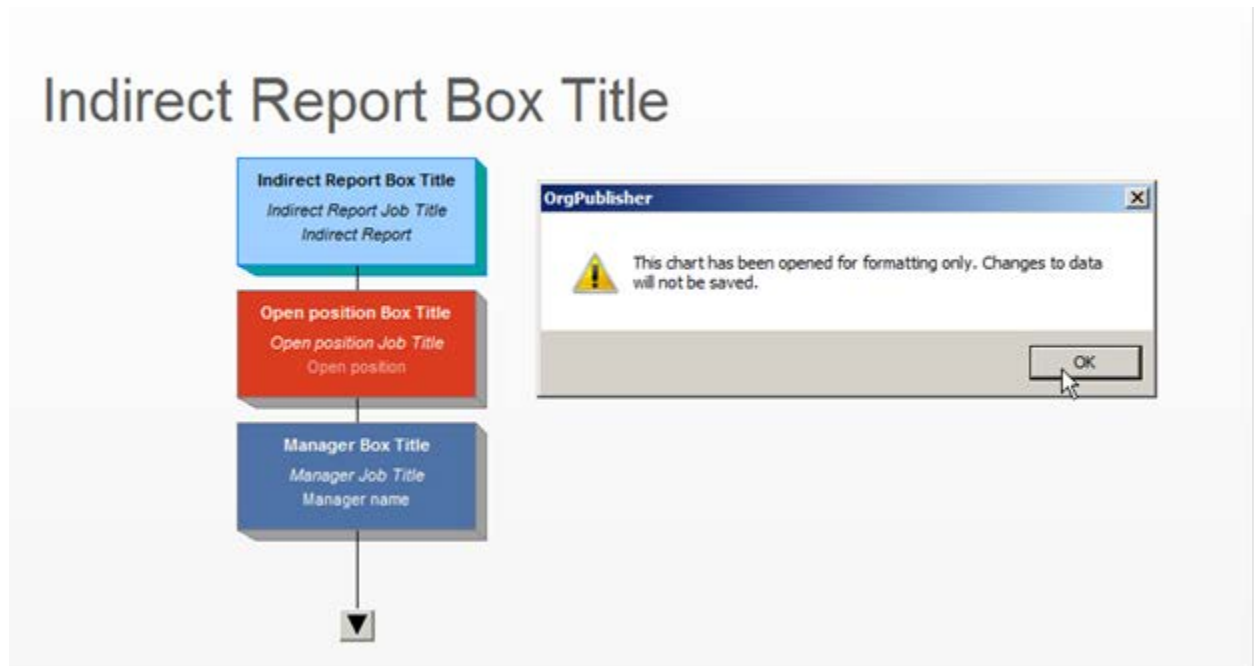


Figure 42.

Send Feedback

Feedback on the functionality and ease of use within OrgPublisher is welcomed.

1. Select **Help** in the OrgPublisher application menu then **Send Feedback to Aquire**.

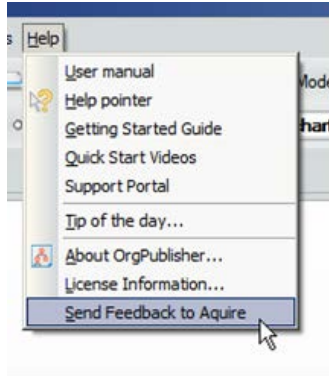


Figure 43.

2. Your email client launches with the OrgPublisher version in the subject line. The email message is addressed to feedback@aquire.com.
3. Type your comment or question in the body of the message and **Send**.

Chart Action Buttons

The action buttons automatically display when the mouse cursor hovers over each data field in the chart, eliminating the need to right-click to see available options.

This feature is available in published PluginX, EChart rich client, and both planning charts options, organizational and succession.

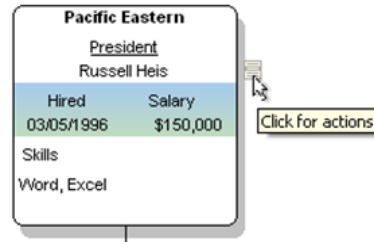


Figure 44.

In this example, the Job title action button was clicked. The data associated with the job title is a Smart Link. Smart Links appear at the top of the action box. See the Hotspots and Smart Links document for more detailed information.



Figure 45.

Chart Action buttons display more options when used by the chart administrator within the OrgPublisher application. This example shows chart administrator options for the same box and job title as in the figure above.



Figure 46.