



OrgPublisher Print and PowerPoint

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Printing in OrgPublisher

OrgPublisher provides many options to layout print pages as needed by the end user. The layout techniques can be used in print output as well as Microsoft® PowerPoint.

Print Setup

We recommend that you set up the printer information before you select the *Print Wizard* default and begin printing charts to prevent the output from using the machine default settings.

Setting Print Defaults

1. Click the Print button  in the toolbar. The *Print* dialog opens.
2. Options vary, depending on available print drivers. Set your print preferences, such as the actual printer device, paper size, paper orientation, etc.

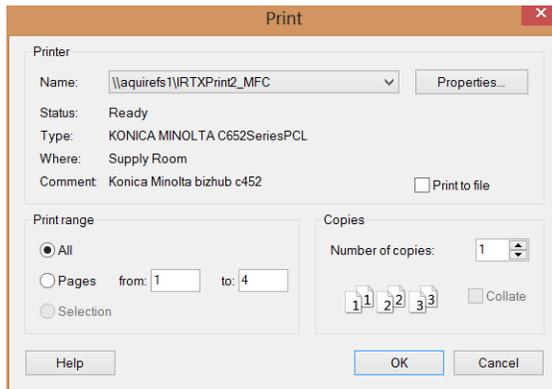


Figure 1.

3. Click **OK** to save the changes.

Print Defaults Set by Chart Administrator

As chart administrator, you can set defaults that make printing easier for viewers of the published chart.

Note: This document includes just some of the available options you can use to make the printed page look the way you want it. Many different results are achievable, and you are not limited to the examples we show here.

Print Wizard Option

The Print Wizard provides options to the user preparing to print a chart. By default, the Chart View is printed when the print button is used. When the Print Wizard is enabled by the administrator, a prompt directs the user to select any visible view for printing.

Options include, but are not limited to:

- Chart View
- List view
- Profile View
- Tree View
- Summary View
- 9 Box Matrix View

Activating the Print Wizard

4. Select **File** from the menu bar then **Print options**.
5. Click to select **Use Print Wizard**.



Figure 2.

Save Preview Settings

The OrgPublisher *Print Preview* offers many options for formatting the page output prior to sending the job to the printer. As administrator, you can preview the output, make modifications to the page layout, set page breaks, set defaults for whether or not an index prints, etc. If the **Save Preview Settings** option is enabled, your settings become part of the published PluginX and EChart rich client chart settings.

Activating the Save Preview Settings Option

1. Select **File** from the menu bar then **Print options**.
2. Click to select **Save Preview Settings**.



Figure 3.

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Using the Print Wizard

When the *Print Wizard* is enabled, the end user is prompted to select the print view when the print button is clicked.

Note: Although you can go straight to the Print Wizard, we recommend that you launch the Print Preview where you can modify the layout before printing the chart.

1. Click the Print button . The Print View dialog opens.

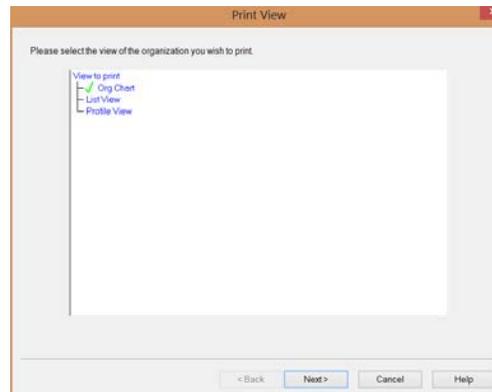


Figure 4.

2. Select the view you want to print and click **Next**.
3. If you select **Org Chart**, choose one of the **Print Options**, **Wall Chart** or **Book Style**.

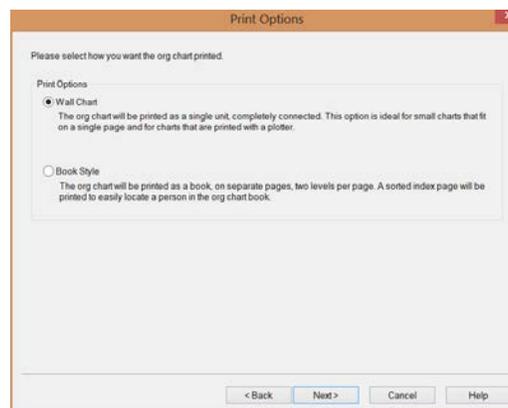


Figure 5.

Click **Next**.

4. If you select **Book Style**, a dialog provides additional setting options. See the for detailed information.

If you select **Wall Chart**, a dialog allows you to define **Header/Footer** information and indicate if you want to **Include Legend**. See the for detailed information on header and footer options.

Click **Finish**.

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Wall Chart Print Preview

Wall Chart is the best option when sending the whole chart to a plotter or printing a large section of the chart.

Previewing in Wall Chart

1. Click Print Preview  in the toolbar. The *Print Preview Type* dialog opens.
2. Select **Wall chart preview**.

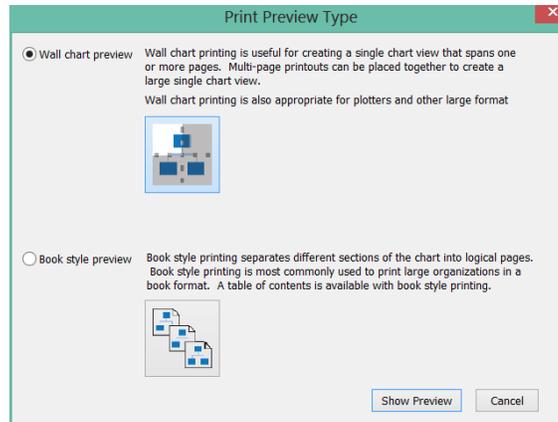


Figure 6.

3. Click **Show Preview**. The chart preview opens using the current chart layout.

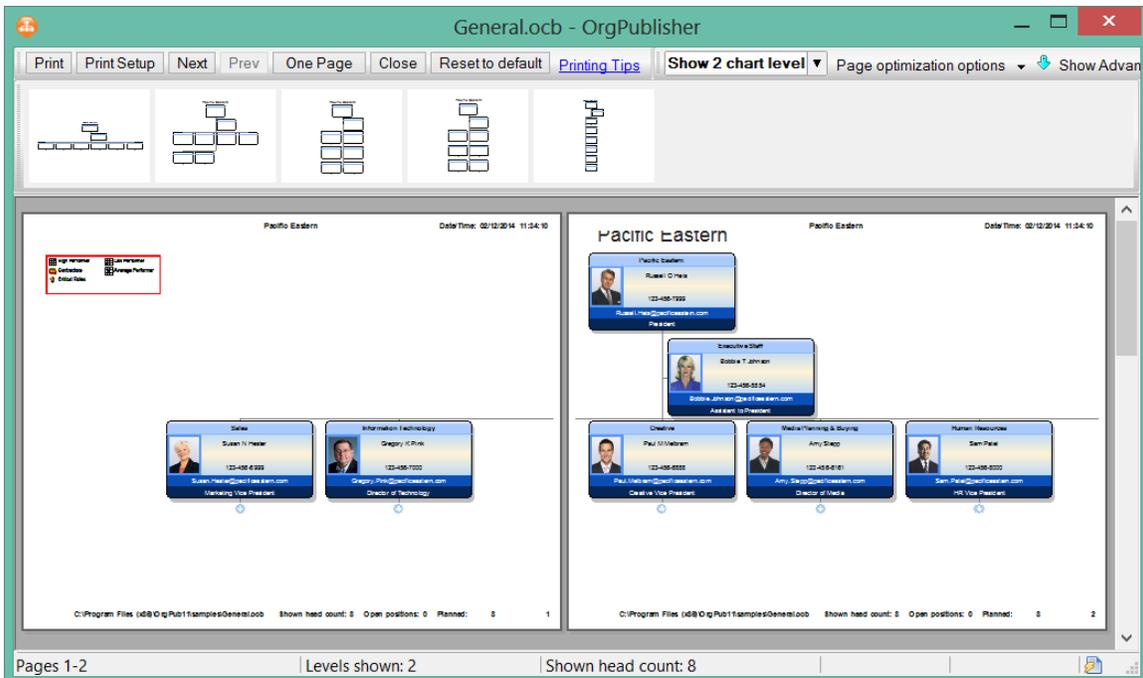


Figure 7.

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Configuring the Printed Page

OrgPublisher *Print Preview* provides options to control the printed page output. Toolbar buttons and brief descriptions follow.



Figure 8.

- **Print** – Sends the output to the printer as it currently displays in the preview window.
- **Print Setup** – Launches your print driver so you can select the printer, paper size, etc.
- **Next** – Displays the next page of the chart in the preview window – enabled when the chart is set to print across several pages.
- **Prev** – Displays the previous page of the chart in the preview window – enabled when the chart is set to print across several pages.
- **One Page/Two Pages** – Displays the chart in the preview window as one page or across two pages – enabled when the chart is set to print across several pages.
- **Close** – cancels the print preview and returns to the Chart View.
- **Reset to default** – Removes all modifications made in the preview window and returns the preview back to its original settings.
- **Printing Tips** – Links to a user help page for Print Preview.
- **Show levels** – Changes the number of chart levels displayed in the preview window.
- **Page optimization options** – Provides options allow for more readable boxes on a printed page.
- **Show Advanced Options/Hide Advanced Options** – Displays a toolbar with additional modification options. See the for detailed information.

Page Optimization Options

There are four options available to reduce the height and width of the chart on a page. Each of these options creates “white space” on the printed page for easier viewing and space utilization.

- Compact boxes
- User narrow font
- Put employees in box with manager
- Put employees in box below manager
- Hide secondary fields

Using Compact Boxes

Click **Page optimization settings** and select **Compact boxes**.

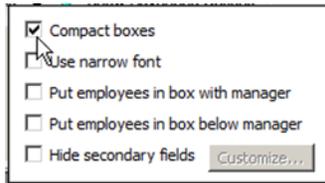


Figure 9.

Preview before optimization

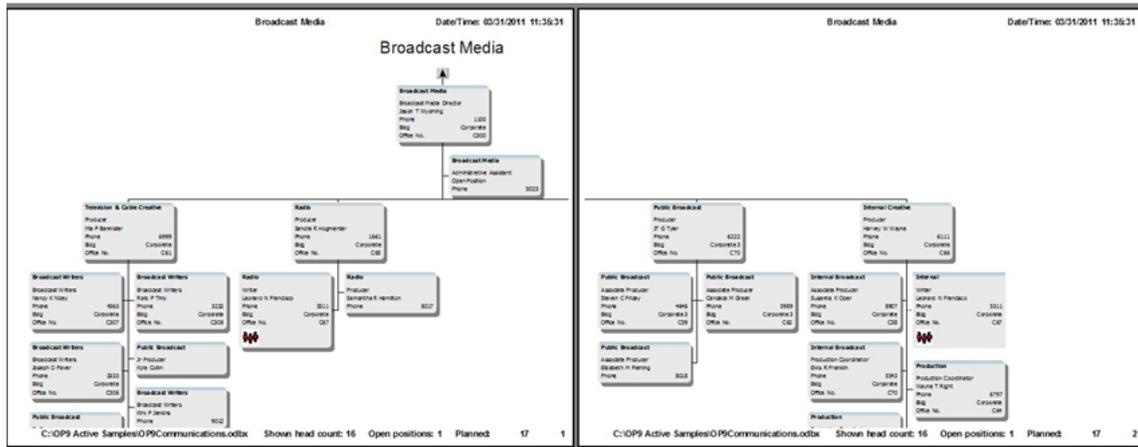


Figure 10.

Preview after optimization

Unnecessary white space has been removed from the chart and boxes no longer “drop” off of the page.

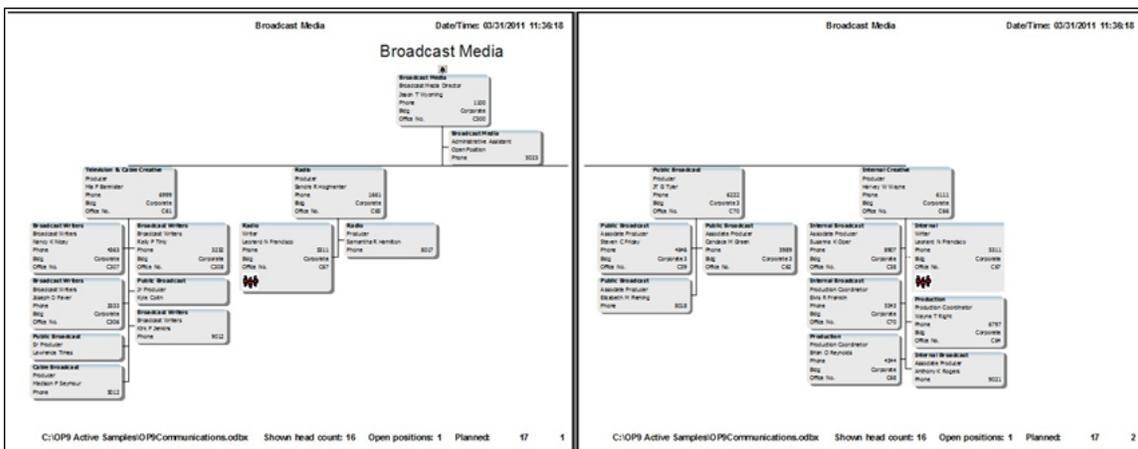


Figure 11.

Using Narrow Font

The following example uses a combination of compact boxes and using narrow font. Click **Page optimization options** and select **Use narrow font**.

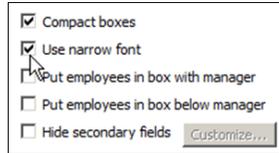


Figure 12.

Preview before optimization

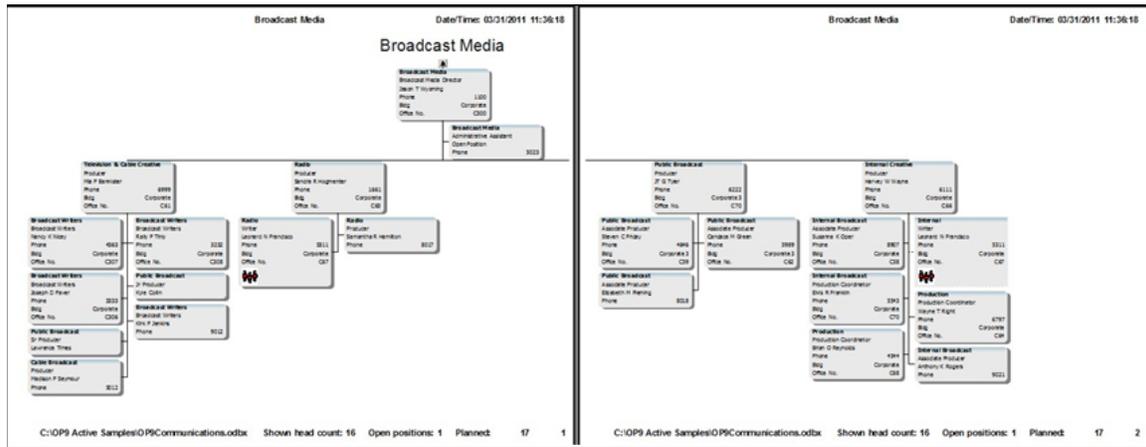


Figure 13.

Preview after optimization

The width of each chart box has been reduced and only one arm of the organization remains on the second page.

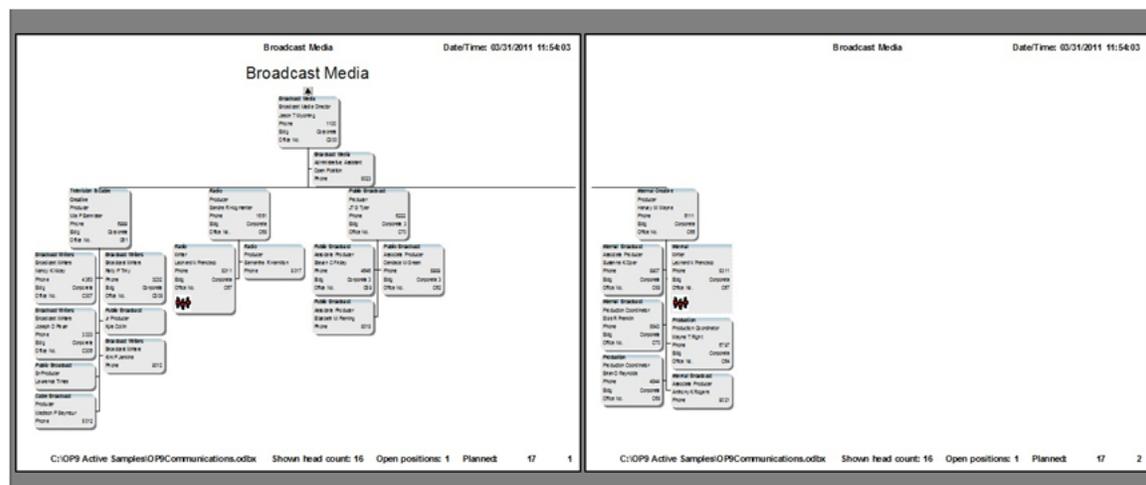


Figure 14.

Putting Employees in Box with Manager or in Box Below Manager

The following example uses a combination of compact boxes, using narrow font, and putting employees in box with manager or putting employees in box below manager.

Click **Page customization options** and select **Put employees in box with manager**.

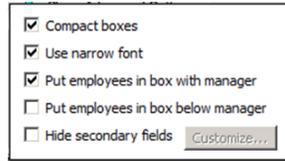


Figure 15.

Preview before customization

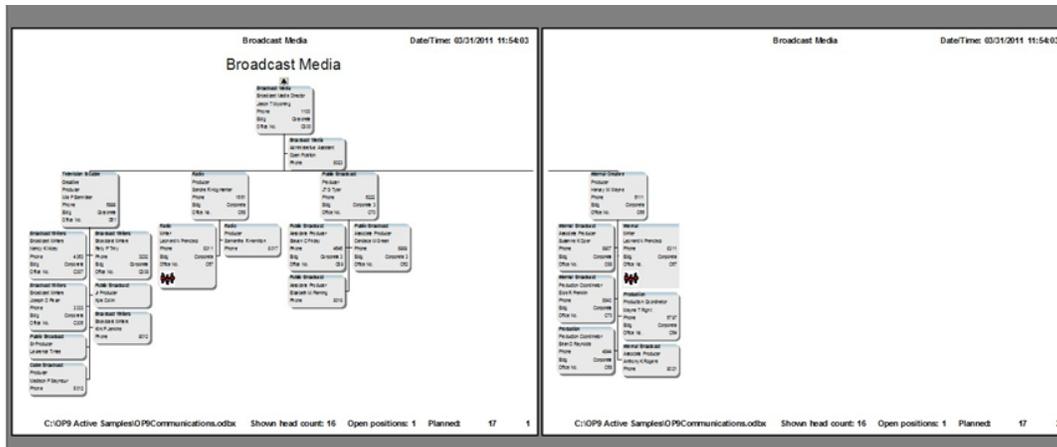


Figure 16.

Preview after customization

Each manager now resides in the same box as all of his direct reports, and the boxes are stacked side-by-side, flowing over to another page.

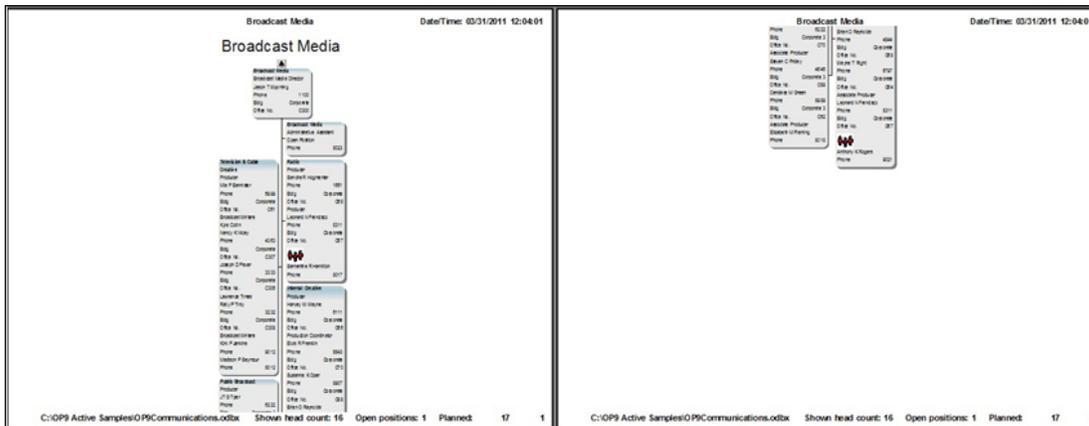


Figure 17.

Preview after customization

After switching to the **Put employees in box below manager** option, manager boxes display horizontally and their direct reports appear in a single box below each manager. One arm of the organization spills over onto a second page.

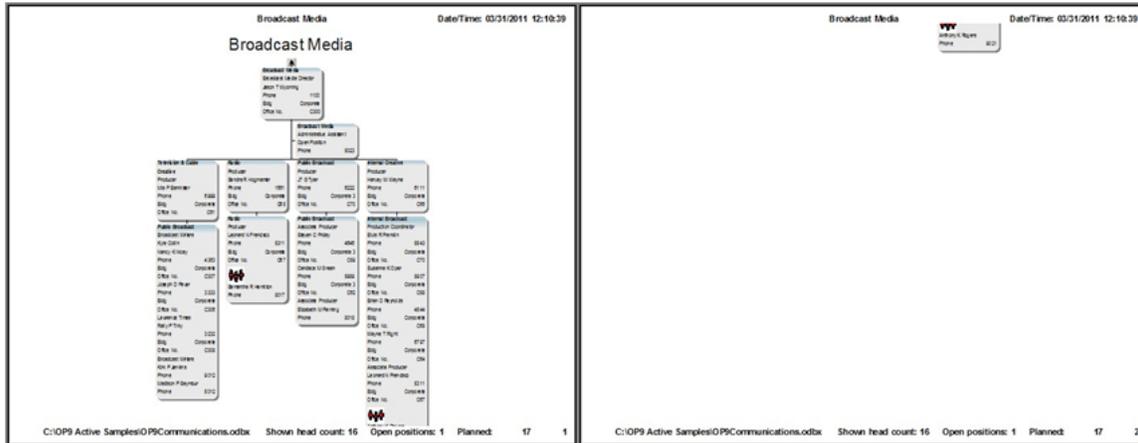


Figure 18.

Hiding Secondary Fields

The following example uses a combination of compact boxes, using narrow font, and hiding secondary fields. The **Hide secondary fields** option allows you to remove unnecessary fields in chart boxes in order to print the chart more effectively.

The hide option is not available for use with **Put employees in box with manager** or **Put employees in box below manager**.

Click **Page optimization options** and select Hide secondary fields. A **Customize** button appears.

Preview before optimization

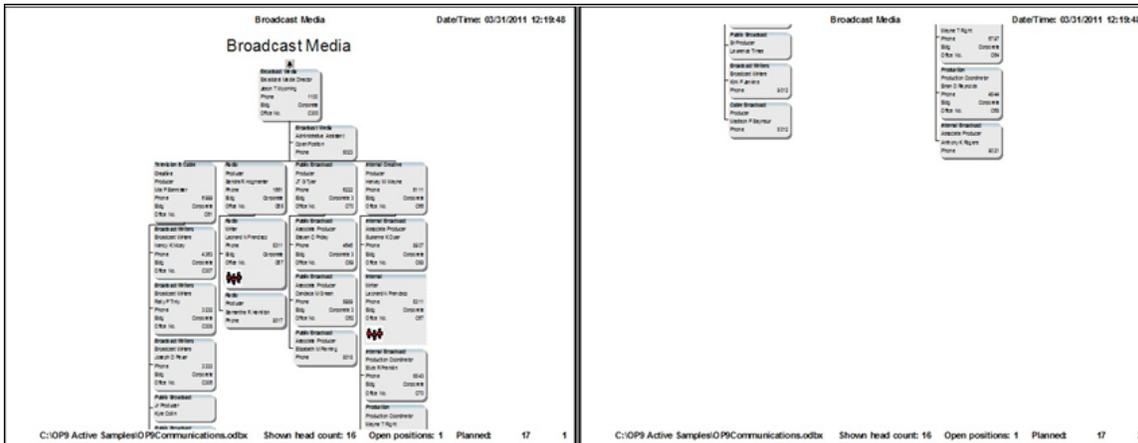


Figure 19.

Preview after optimization

All custom fields have been hidden and the chart fits on one page.

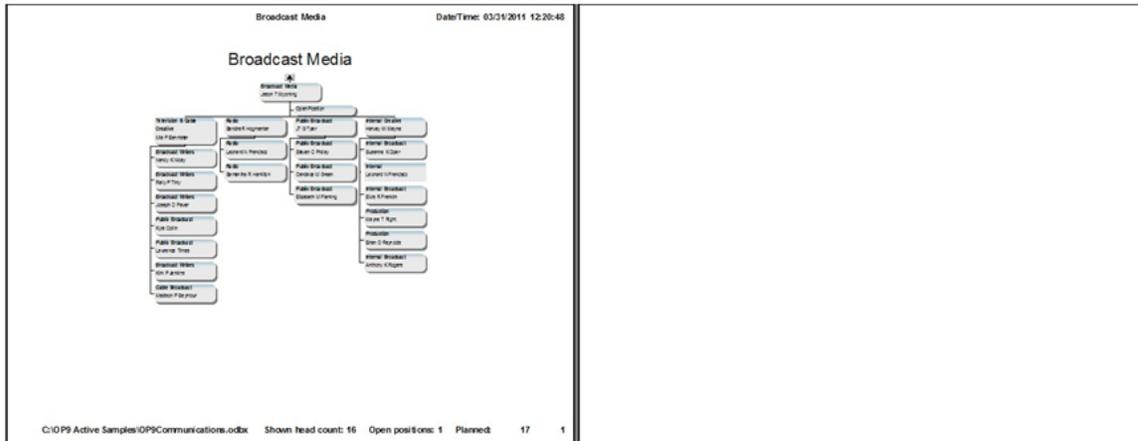


Figure 20.

Preview after optimization with Hide/Customize option

Click **Customize** then select fields to print in the chart. This example uses Bldg, and Office No.

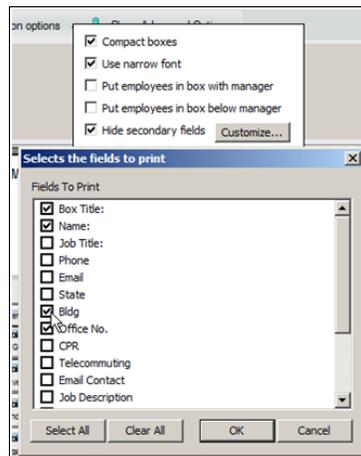


Figure 21.

Although additional fields are included in the chart boxes, the chart still fits on one page.

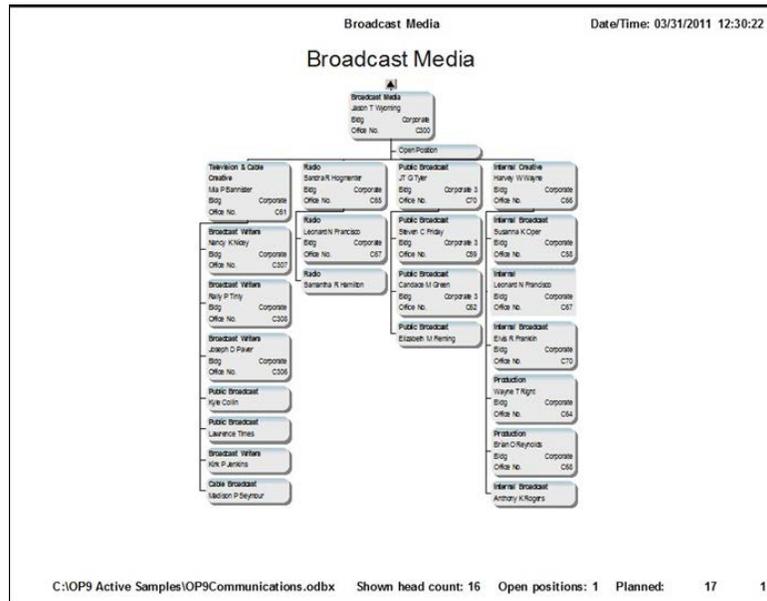


Figure 22.

Show Advanced Options

The advanced options provide additional controls to arrange the printed page.

Click **Show Advanced Options**.

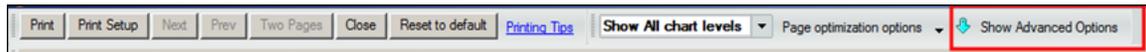


Figure 23.

Additional buttons display in a second toolbar just above the preview pane. The **Show Advanced Options** button now appears as **Hide Advanced Options**.

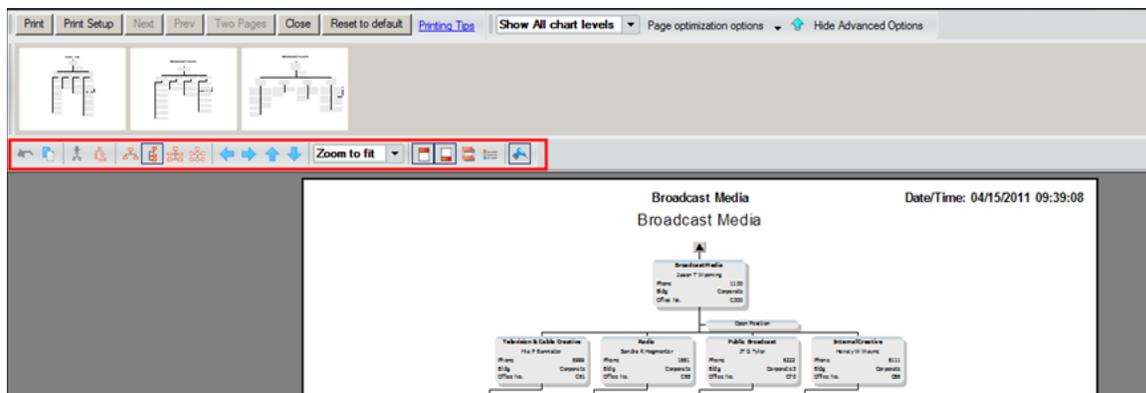
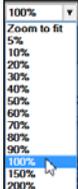


Figure 24.

Advanced Option Button	Description
	Undo – Click to clear the last change: available if the arrow buttons or drag/drop are used to change the chart, departments, or boxes.
	Copy – Click to copy the preview page and then paste into another document: available if arrow buttons or drag and drop are used to change the chart, departments, or boxes.
	Set Top of Chart – Click to set selected box as the top of the displayed chart.
	Display Whole Chart – Click to view the complete chart hierarchy if the current view is not already set at the top of the chart.
	Layout buttons – Click to change the chart layout, 1, 2, 3, or 4, which affects how the lowest level boxes in each hierarchical arm are displayed.
	Move – Click a directional arrow to move a box, department or the chart left, right, up, or down on the preview page.
	Zoom – Select the percent from the drop-down list to determine how large or small the chart boxes appear in the preview page. The Zoom to fit option automatically shrinks the chart boxes to fit on one page of the preview.
	Header and Footer – Click to open the Header/Footer dialog to configure elements or turn header/footer options on or off.
	Add or Remove Legend – Click to toggle the group icon legend on or off – if a legend is available for the chart.
	Drill-up and Drill-down – Click to toggle the display of the drilling through levels button on or off.

Setting Top of Chart

You may want to change the print area of your chart while in the preview window. If you can see the box that you want to use as the top of the chart, select it and the  button.

1. Select the top of chart box you want to use. The following examples uses the Sales division.

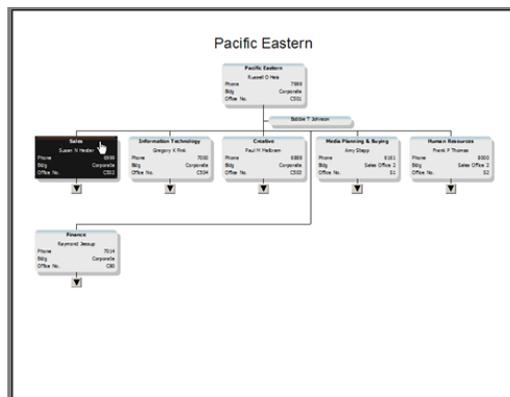


Figure 25.

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- Click the set top of chart button .
The Sales division now displays at the top of the preview window chart.

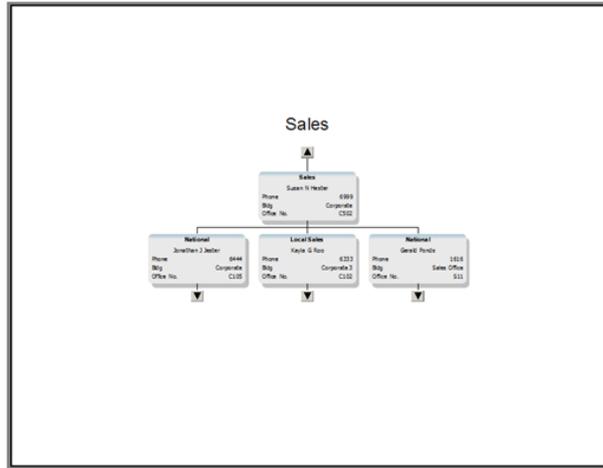


Figure 26.

- To return to the original top of chart, click the display whole chart button .

Changing Lowest Level Box Configuration

The four chart layout options determine how the lowest level of boxes are arranged in the chart. Examples of each layout follow.

- Layout 1** – lowest level boxes are horizontal

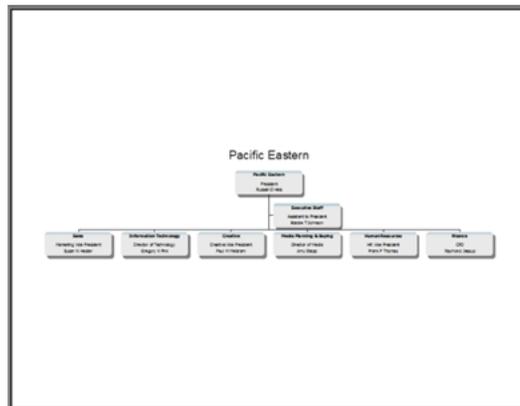


Figure 27.

Moving Boxes with Arrows or Drag and Drop

A chart box, department, or the whole chart can be repositioned on the preview page by using the directional arrows  or with drag and drop.

1. Select the box, department, or the chart you want to move.

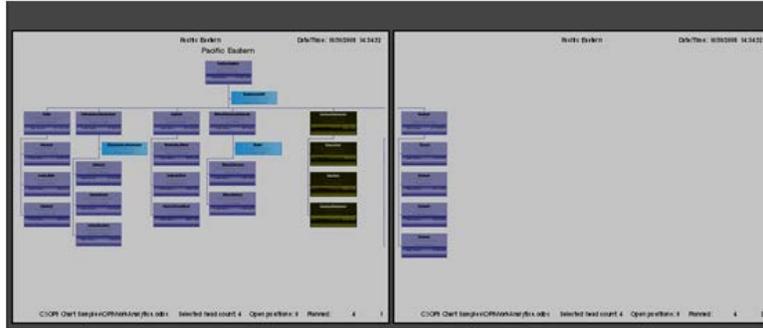


Figure 31.

2. Click the appropriate directional arrow. Or, hold down the left mouse button on the selection and then drag to the location and then release the mouse button.

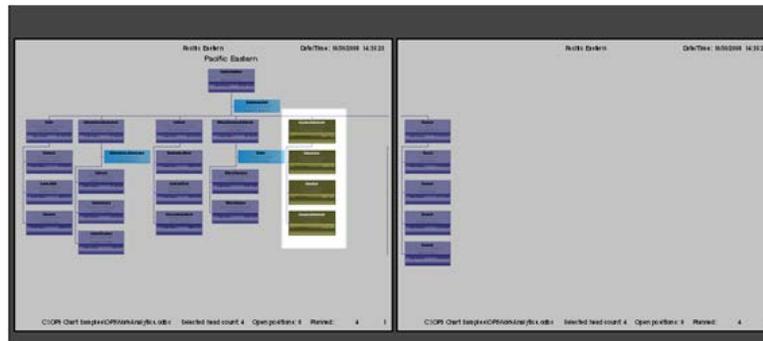


Figure 32.

3. If you place all boxes onto a single page, click the button to display only one preview page.

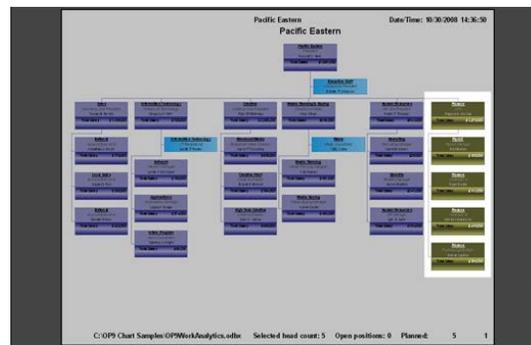


Figure 33.

Repositioning the Top Box on the Page

1. Click twice on the top box (not a “double-click”). This action selects only that box.

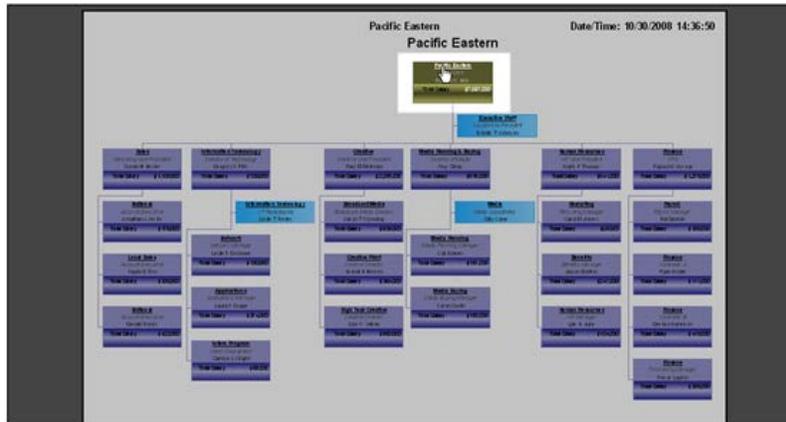


Figure 34.

2. Use the directional buttons or drag and drop to the new location. The top box and chart title are now repositioned on the page.



Figure 35.

3. Repeat the process with the Assistant box to move it under the top box.

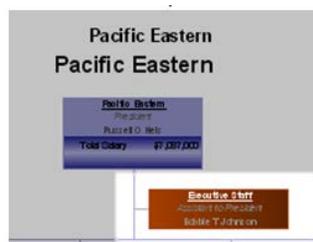


Figure 36.

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Changing the Size of the Chart with Zoom Control

Examples of the chart preview display using zoom .

- **Layout 2** with three levels shown – Zoom set to 100%

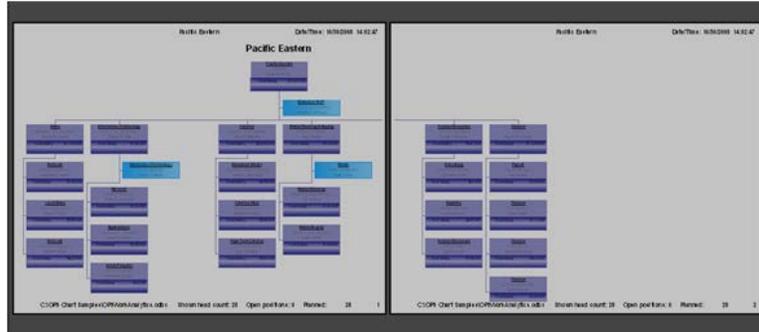


Figure 37.

- **Layout 2** with three levels shown – Zoom 70%



Figure 38.

Modifying the Header and Footer

Three buttons  control the configuration of the header and footer.

- The first button toggles the header on and off. Header is turned off.

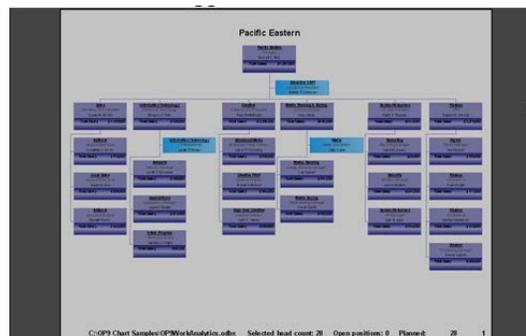


Figure 39.

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- The second button toggles the footer on and off. Footer is turned off.

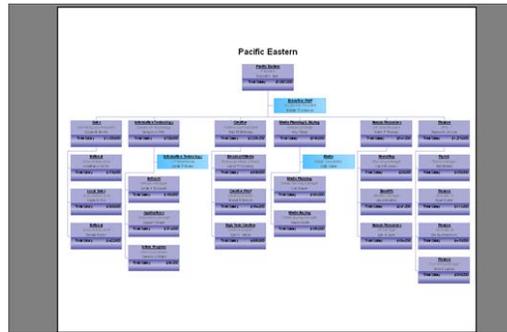


Figure 40.

- The third button controls the elements shown in the header and footer. Make changes as necessary and click **OK**.

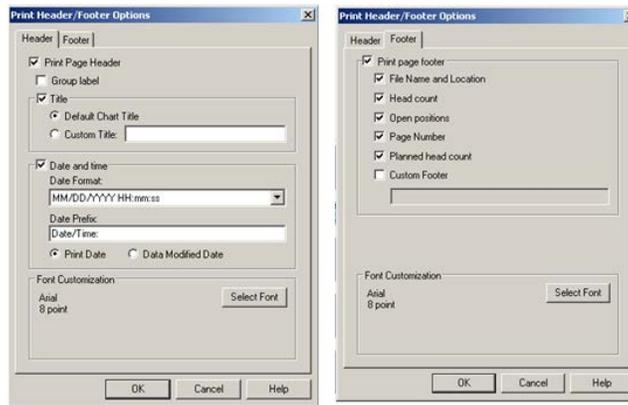


Figure 41.

Adding/Removing Legend

If your chart contains a legend, you can toggle the display on or off  in the print preview.

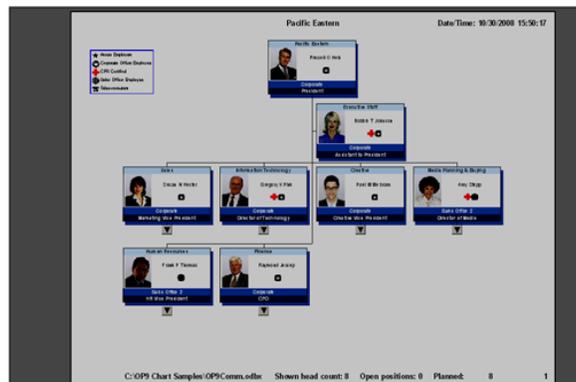


Figure 42.

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Turning Off Drill Arrow Buttons

The Drill button  allows you to toggle the display of the drill buttons in the chart preview.

If the drilling buttons are shown, the lowest level boxes display horizontally. The use of chart layouts 2 and 3 do not impact the display of the chart.

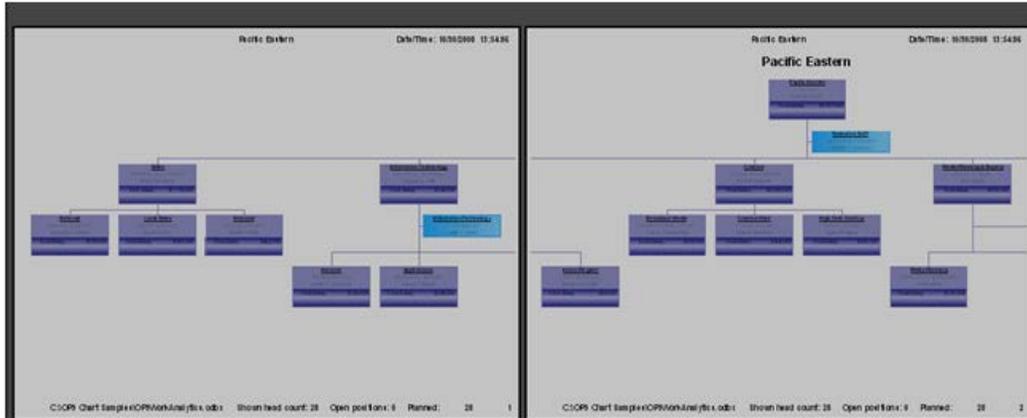


Figure 43.

Book Style Print Preview

Book style chart printing is best suited for printing large portions of the chart or the complete chart. OrgPublisher breaks the chart into pages.

Chart administrators can use the Print Preview to configure the whole organization. These settings are saved and become part of the published chart.

Previewing in Book Style

Select Print Preview from the toolbar and select **Book style preview**. Click **Show Preview**.

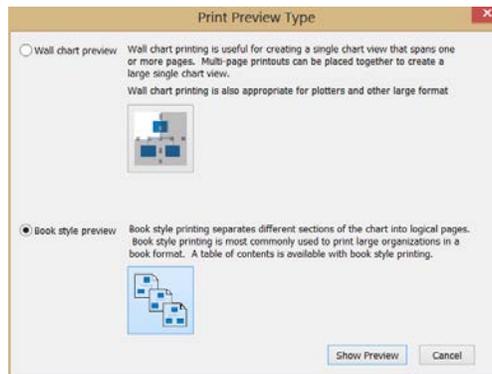


Figure 44.

The preview window shows two panes. The upper pane displays all pages for printing. The lower pane sets the focus on the selected page in the upper page. You can manipulate the page layout from this pane.

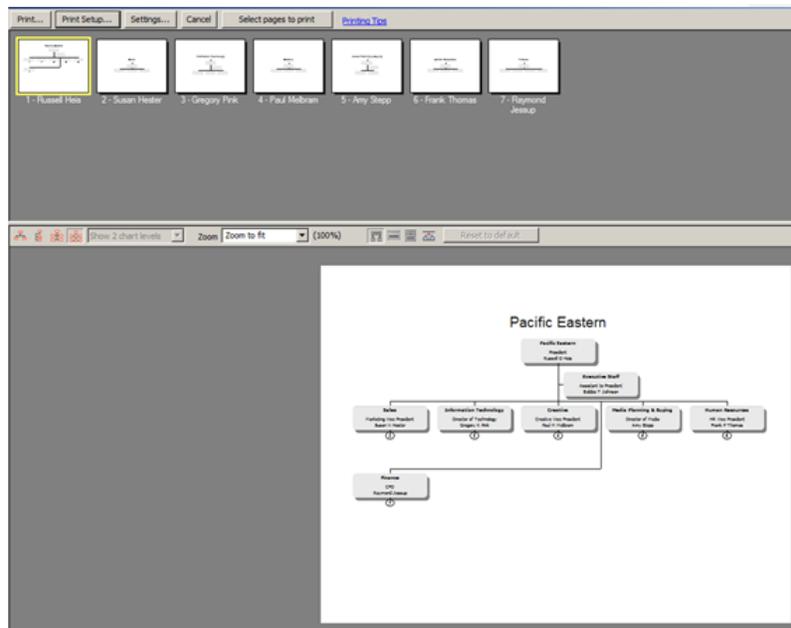


Figure 45.

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Each pane contains options to modify the print output. The upper pane displays the printing and settings buttons.



Figure 46.

The lower pane contains page manipulation buttons, as detailed in the [Wall Chart Preview](#) section.



Figure 47.

Using Settings

Select **Settings** in the upper pane menu. The *Settings* dialog opens. The highlighted section in the figure below provides 2 options.

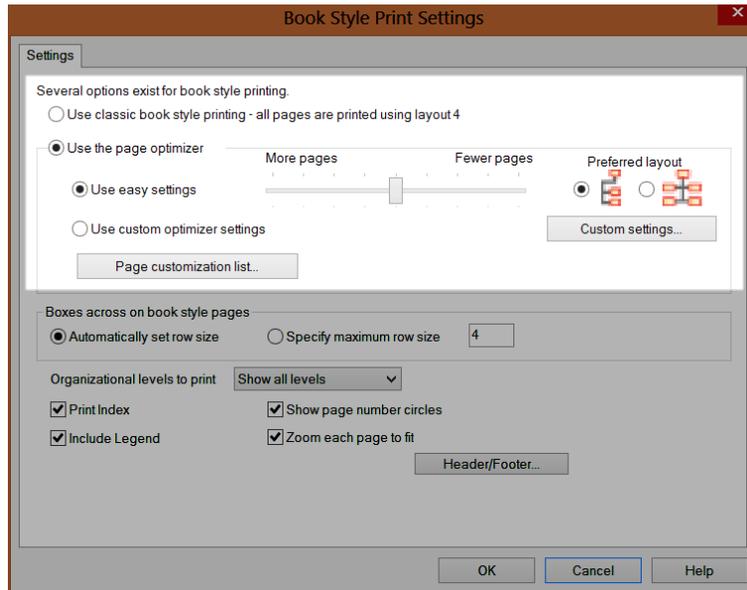


Figure 48.

- **Option 1** - Do you want to break the chart into two levels using Layout 4 (classic book style printing) on all pages?
- **Option 2** - Do you want to apply controls to optimize the printed pages?

Using the Page Optimizer

If you select option 2, you can use the setting options available under the optimizer.

- **Use easy settings** – Move the slider to reduce or increase the number of pages printed. Determine your **Preferred layout** for the lowest level boxes printed on the chart page.



Figure 49.

- **Use custom optimizer settings** – click the **Custom settings** button to open the *Advanced Page Optimizer Settings* dialog.

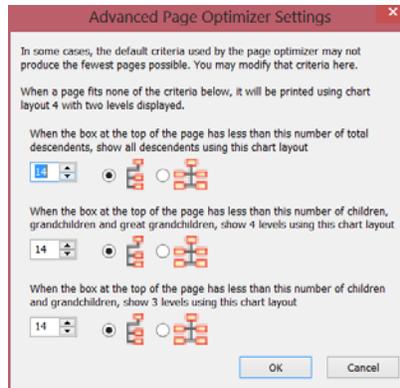


Figure 50.

Each setting controls the output of each individual page based on the criteria you select. Make your changes and click **OK**.

- **Page customization list** – opens a dialog to display specific pages that have been modified. Use this dialog to remove some or all of the pages listed. Detailed information about this options can be found in the ...section.

The highlighted section in the figure below provides several additional options to choose when printing your chart in book style.

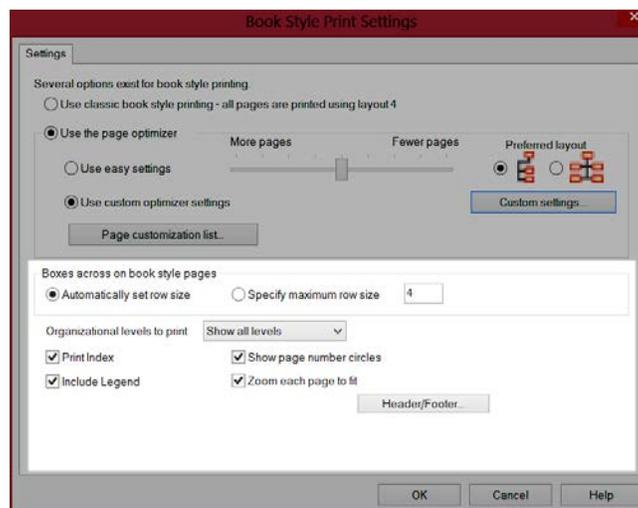


Figure 51.

- **Boxes across on book style pages** – gives you the option to control the number of boxes shown across pages the use Layout 4 (wrapped and stacked boxes). If you choose, OrgPublisher can automatically set the number or indicate the number you prefer to use for each line of boxes.

Boxes across on book style pages

Automatically set row size
 Specify maximum row size

Figure 52.

- Automatic – OrgPublisher selects 3 boxes across

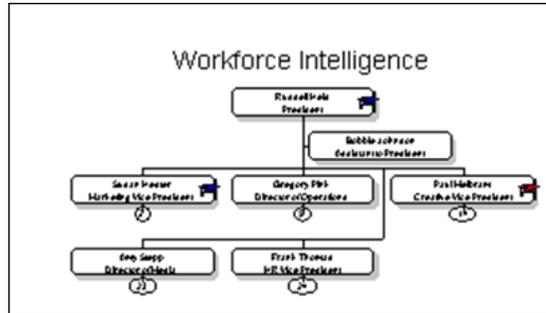


Figure 53.

- Maximum - manually specified 4 boxes across

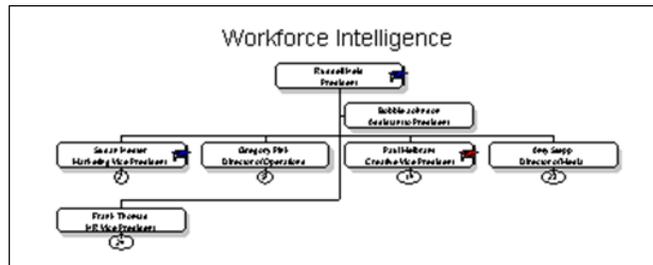


Figure 54.

- **Organizational levels to print** – allows you to determine the number of levels from the top of the chart you want to print. Click the drop-down arrow to select the levels.

Organizational levels to print Show 3 chart levels ▼

Figure 55.

- **Additional elements to print** – allows you to configure other elements on the printed page.

Print Index Show page number circles
 Include Legend Zoom each page to fit

Figure 56.

- **Print Index** – uses the field layout of the *List View* in the selected style to print. This appears at the beginning of the printed chart. Each record is listed and sorted per the *List View* specifications showing the page number where the box is located. More information can be found in the OrgPublisher Views document.
- **Show page number circles** – prints the page number circles (replacing the drill arrow button) indicating where the selected hierarchical branch continues.
- **Include Legend** – valid when a legend is included in the selected chart style, prints the legend on each chart page.
- **Zoom each page to fit** – automatically resizes each output page to fit on a single printed sheet. You can modify the zoom percent on individual pages to fit better this selection.
- **Header/Footer** – opens a dialog that allows you to modify or turn off the header and footer for the printed pages. Once selections are made, click **OK** to return to the Settings dialog.

Selecting Pages to Print

1. Click the **Select pages to print** button to designate all pages in the chart for printing.

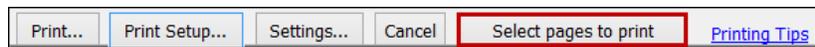


Figure 57.

A message opens letting you know that you have turned on **Selective printing mode** and can cancel printing for selected pages by clicking on the print icon. Click **OK** to continue.

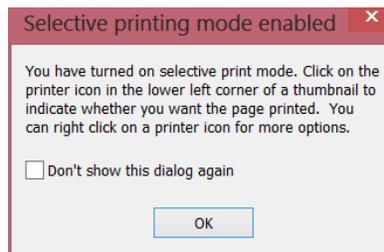


Figure 58.

The menu now displays a **Cancel print page selection** button in place of the **Select pages to print** button.

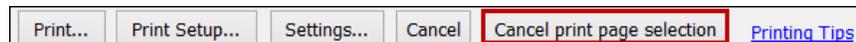


Figure 59.

By default all pages are selected to print.

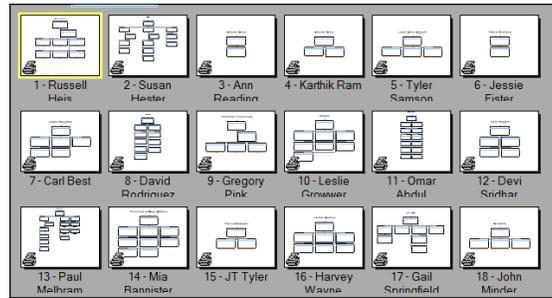


Figure 60.

- To cancel the printing of a page, click the print icon in the lower-left corner of the page thumbnail. The icon appears in a grayed out circle with a line drawn through it, indicating this page will not print.



Figure 61.

- To exit from this print mode, click **Cancel print page selection**.

Manually Customizing a Page

The lower pane of the book style preview shows the selected page and provides options to modify the look of the page.

- Select the thumbnail of the page you want to modify in the upper pane. That page displays in the lower pane.

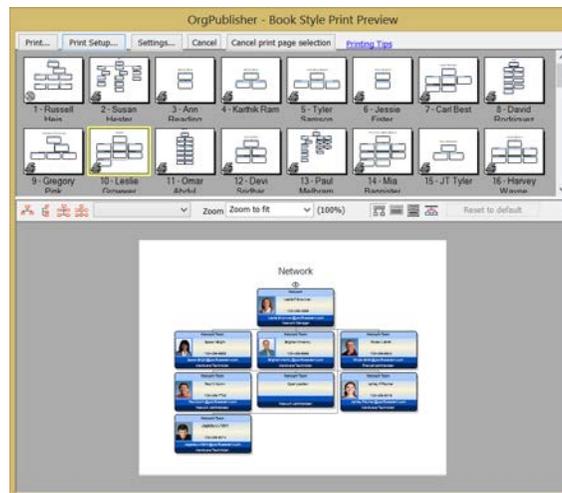


Figure 62.

- Use the toolbar buttons to modify the page. Details for each buttons or group of buttons can be found in the [Wall Chart Preview](#) section.

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Using Zoom and Drag and Drop

When modifying individual pages to ensure readability, work from the highest zoom percent possible. Fifty percent and higher typically provide good readability on the printed page.

If increasing the zoom percent moves some of the boxes beyond the edge of the page, you can move the boxes back onto the page with drag and drop. See the [Moving Boxes](#) topic for more information.

100% Zoom – left and right edge cut off Boxes moved to fit left and right edges

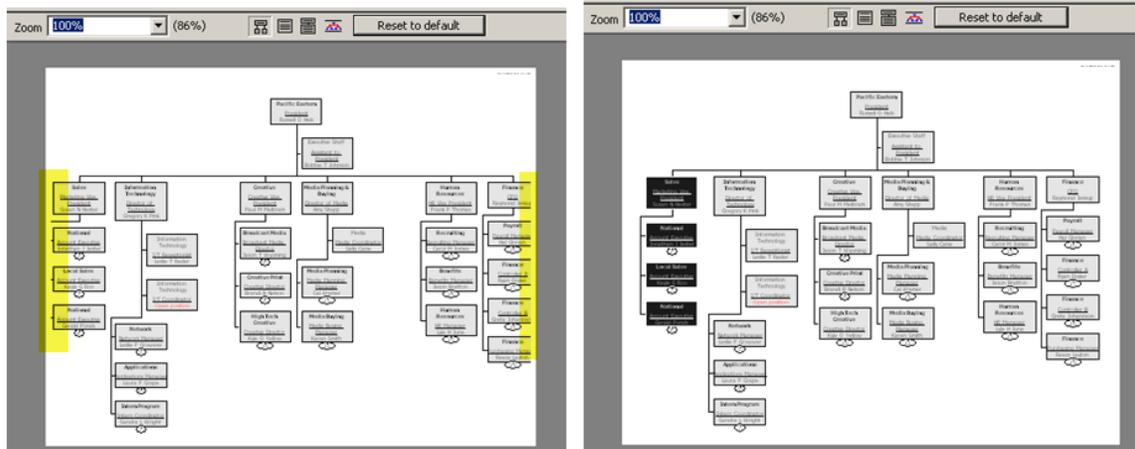


Figure 63.

Working with a Page Customization List

The chart administrator can make customizations to a page that are carried over to the published chart. You can also remove the customizations.

When a page has been customized, a pushpin displays in the upper-right corner of the thumbnail.

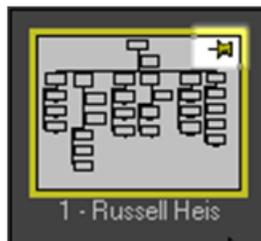


Figure 64.

1. To remove the customization, click **Settings**, then click **Page customization list** in the *Book Style Print Settings* dialog.

The *Book style page customization list* dialog opens.

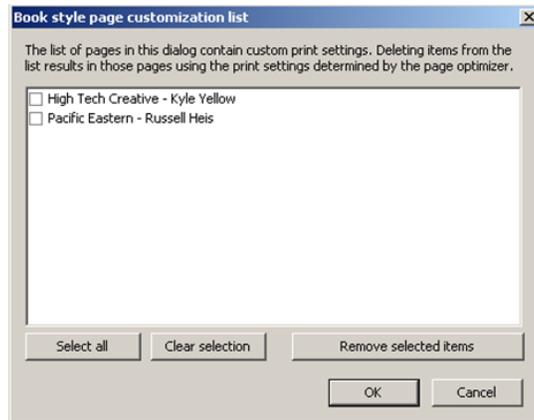


Figure 65.

2. Select the page you want to return to its original state and click **Remove selected items**. Click **OK** to make the change and return to the *Book Style Print Settings* dialog.

You can also remove all customizations by clicking **Select all** then **Remove selected items**.

Or, you can also **Clear selection** and **Cancel** out of the dialog.

Whenever you make customizations, whether or not you cancel them, OrgPublisher asks if you want to save the customization when you exit the preview or click Print.

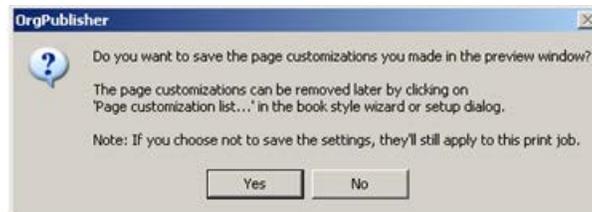


Figure 66.

Sending to PowerPoint

OrgPublisher sends output to Microsoft PowerPoint using the same methods available for Wall Chart and Book Style printing, with a few differences. You access the send to PowerPoint option by clicking the button in the toolbar.

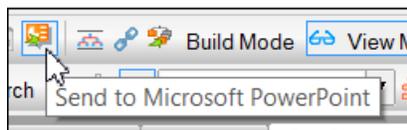


Figure 67.

1. Click Send to Microsoft PowerPoint  in the toolbar to open the *Microsoft PowerPoint Preview* dialog.

2. Select either **Wall chart preview** or **Book style preview** and click **Show preview**.

Using Settings Options in PowerPoint Book Style Preview

The PowerPoint settings options do not include items such as Print Index and Page number circles. It does, however, include a new option.

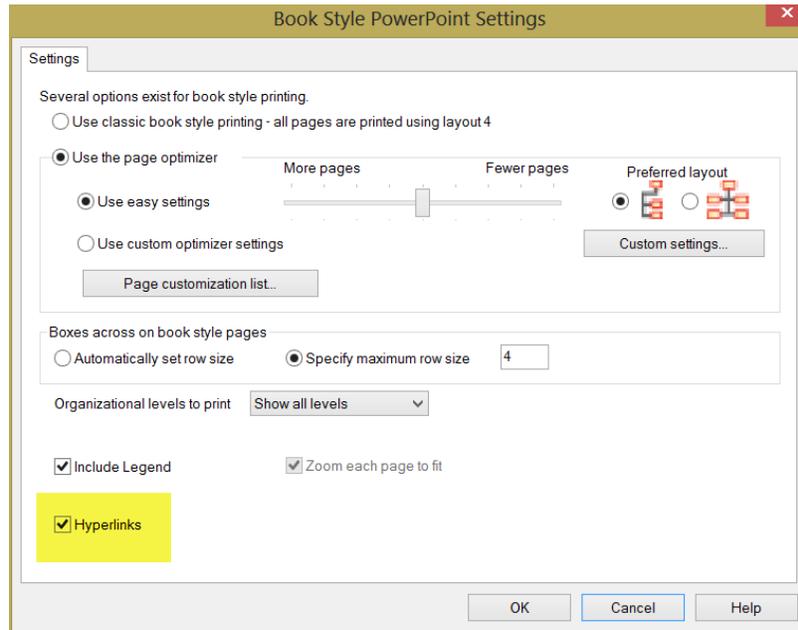


Figure 68.

You can select the **Hyperlinks** option to activate chart hyperlinks in the PowerPoint slides.

Modifying Chart Slides

The upper pane thumbnails in the PowerPoint preview represent individual slides. You modify these slide in the same way as in the print preview feature. See detailed information in the [Configuring the Printed Page](#) topic in the [Wall Chart Preview](#) section of this document.

Selecting Options in the Send to PowerPoint dialog

1. When you have completed your slide customization, click **Send** in the menu bar. The *Send to Microsoft PowerPoint* dialog opens. There are several areas in this dialog from which to make selections.

Page Range

2. Select the appropriate radio button to print just the Current page, All Pages, or just certain Pages. If you select the Pages option, type the page numbers you want to print.

If you used the Select pages to print button, the Pages field is automatically populated.

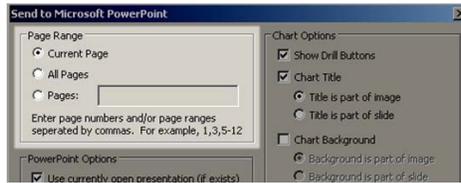


Figure 69.

PowerPoint Options

3. Select the checkbox in the **PowerPoint Options** section if you plan to place the chart slides into an open PowerPoint presentation. If you plan to create a new presentation, verify that the check box is clear.

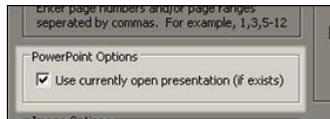


Figure 70.

Image Options

4. Select the radio button for the type of image you want to send to the slide.
Copy as metafile allows you to ungroup the image to manipulate lines and boxes in the slide. This option is not recommended to novice PowerPoint users.

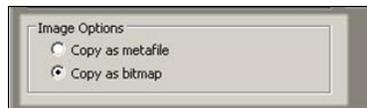


Figure 71.

Copy as bitmap is the default selection. Both options send the slides over a single images.

Chart Options

5. The largest section within the dialog allows you to make selections for the chart slides.

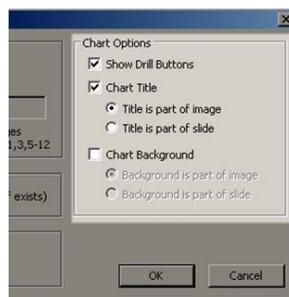


Figure 72.

If **Show Drill Buttons** is selected in this dialog and **Hyperlinks** is selected in the Settings dialog, the drilling arrows are active within the slides to navigate to the next appropriate area of the chart.

If you choose to display the **Chart Title**, it can either be part of the graphic image or part of the slide text, which makes it editable content.

If the chart administrator has enabled the chart background for printing in the *Format* dialog, **Chart** tab, you can continue in this section.



Figure 73.

Select the **Chart Background** check box to choose the background as part of the chart image or as part of the slide. If the background is part of the slide, you can size it to cover the entire slide or just the image of the chart.

6. Click **OK** to accept your selection and send the chart to PowerPoint.