



OrgPublisher Publishing

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Organization Chart Publishing

Publishing charts in OrgPublisher is the method for distributing charts to your organization. There are many options available to meet the needs of your end users.

This document assumes that you are familiar with the [OrgPublisher Architecture Overview](#) in order to determine the type of output required for your organization. Details for creating and managing your publishing definitions are provided in this document.

Publishing Output Features

OrgPublisher provides interact and document output options. A subset of features for the output types is listed below.

Interactive charts

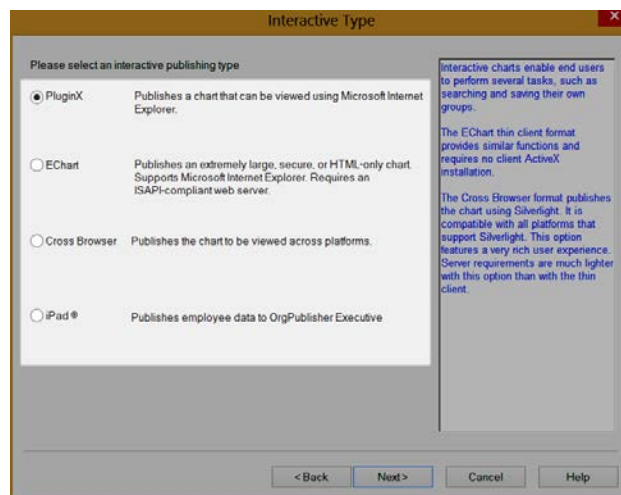


Figure 1.

- Mobile device viewing
- Print and print preview modification of output
- Chain of command
- Layout options
- Export to Microsoft PowerPoint, Excel, and other Windows-based applications
- Search and group for reporting
- Chart filtering and spotlighting
- Multiple styles and views
- Multiple navigation options
- PDF output for EChart rich client
- Organizational planning
- Succession planning

Chart documents

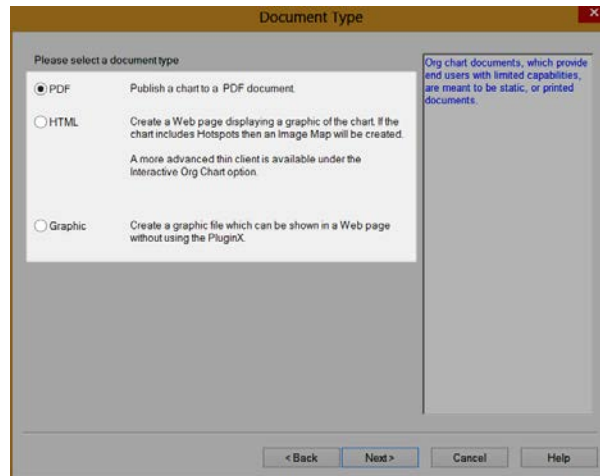


Figure 2.

- Restricted print capabilities
- Restricted navigation

Publishing Wizard

A wizard launches the first time you select the Publish button in the toolbar.

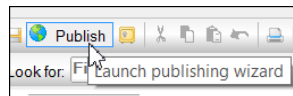


Figure 3.

The *Publishing Wizard* displays different dialogs based on the type of publishing output you select. There are two publishing modes, **Express** and **Advanced**.

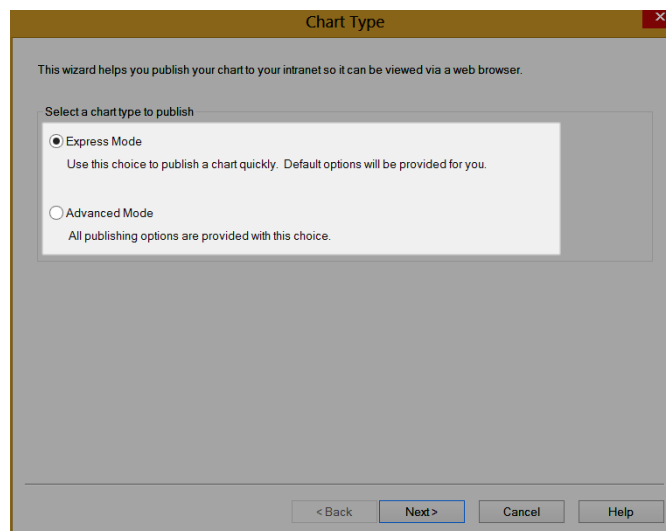


Figure 4.

Express Mode Publishing

Express publishing quickly produces a published chart by using default options on a single dialog.

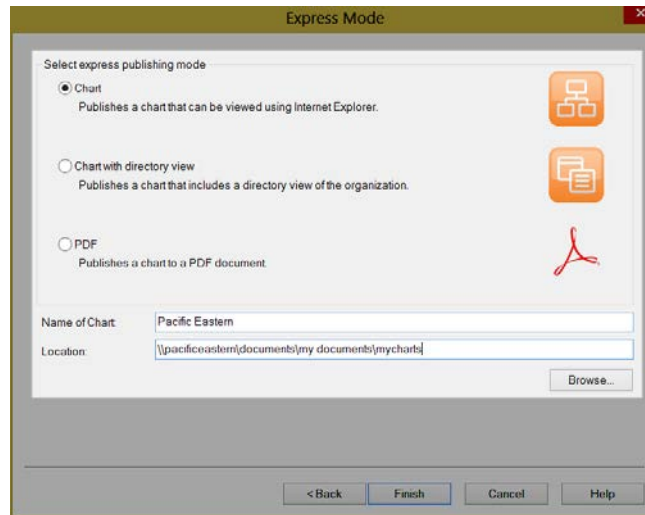


Figure 5.

Publishing Options in Express Mode

The selection dialog in **Express Mode** offers three type of publishing output, **PluginX**, **PluginX with Directory View**, and **PDF**. You type the published chart name and indicate where the chart should be published.

Initially, you can publish locally to view and test the output. If you are publishing to a permanent location, you may need to obtain the local information from your IT team or Web administrator.

If your chart contains more than one style, select the style you want to be active when the published chart is opened before you click the Publish button.

If you publish as PDF, preview the file in the Book Style Print Preview (which uses the selected style as well) to layout the pages the way you want them to appear in the PDF.

Express Publishing Examples

PluginX Express Publishing provides a chart with the interactive functionality as shown in the toolbar figure below.

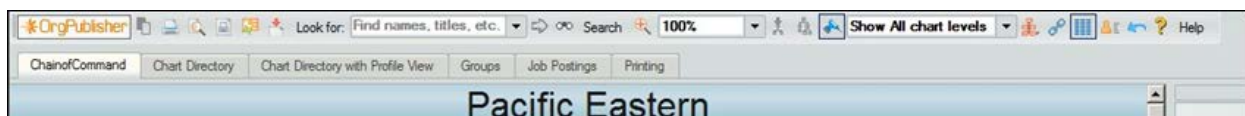


Figure 6.

PluginX with Directory View Express Publishing provides a chart with the same functionality as identified in the figure above, as well as a separate directory view.

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Figure 7.

PDF Express Publishing provides a “portable document file.”

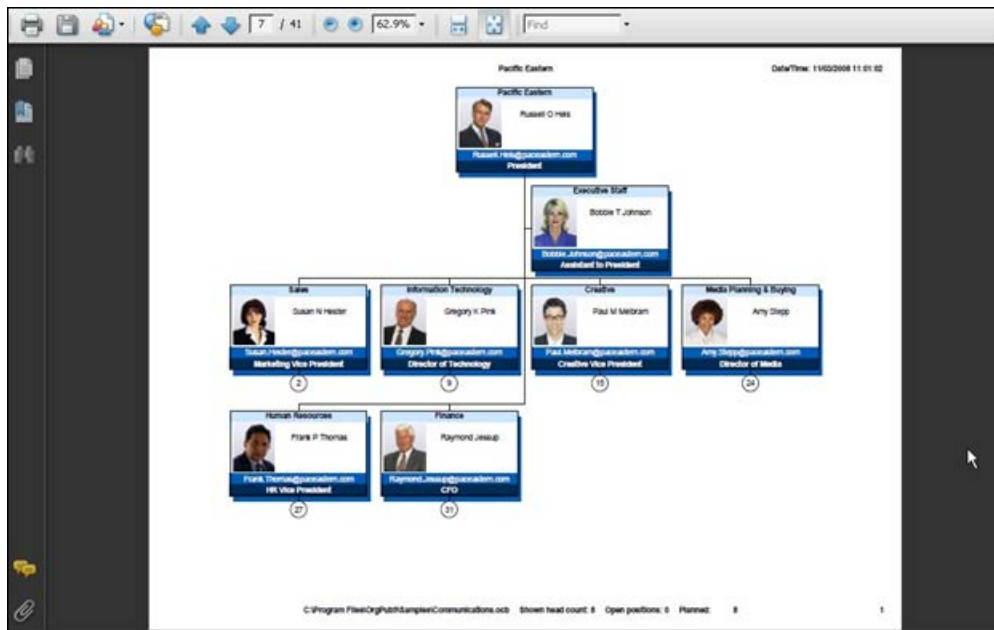


Figure 8.

Advanced Mode Publishing Interactive Charts

Advanced Mode publishing offers more control to the chart administrator. It is available as an option when you publish the first time. It is always the default option used to update any existing publishing definition within the *Published Charts* dialog.

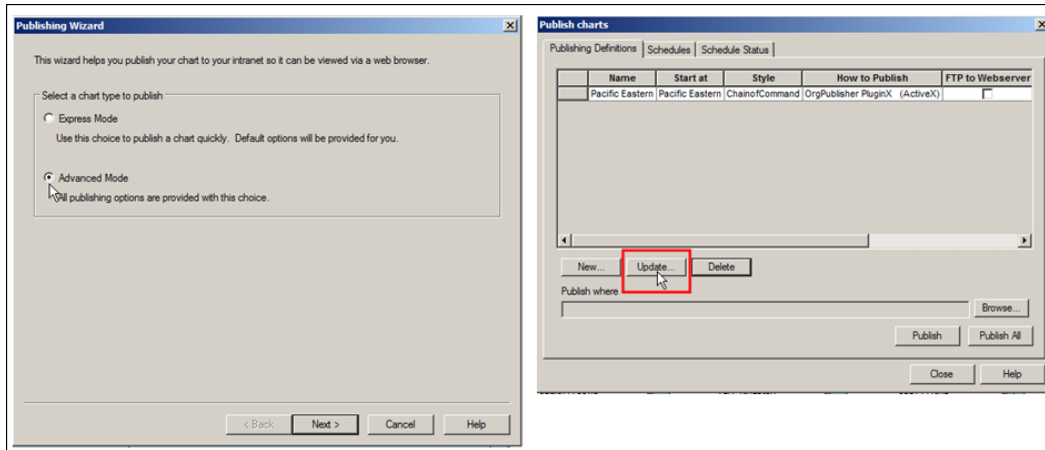


Figure 9.

When Advanced Mode is selected at publishing time, the wizard offers the option to select an interactive of document output. Review the [Publishing Output](#) section for more details.

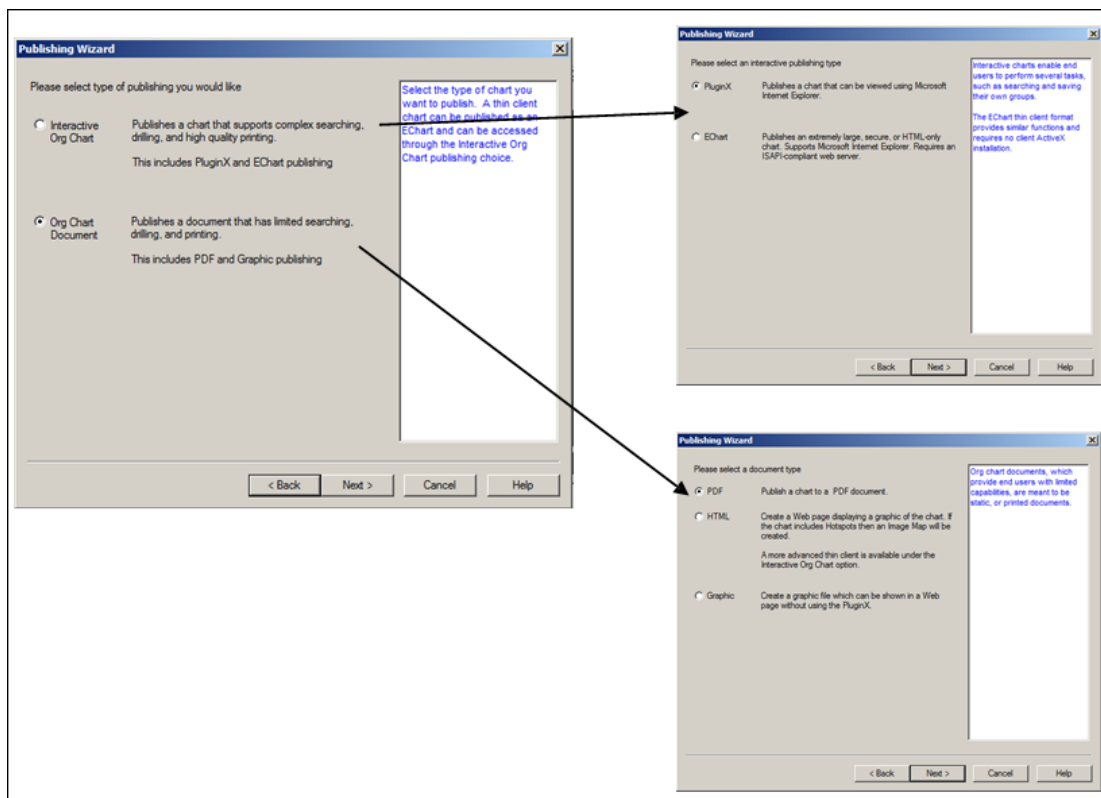


Figure 10.

The *Publishing Wizard* dialogs vary, based in the type of output selected. The following sections review each of the outputs.

Note: Options that appear grayed-out in the wizard are not available for the output type you selected.

Publish Location Dialog

- Type the path for the **Publish to location** where the chart will be published.

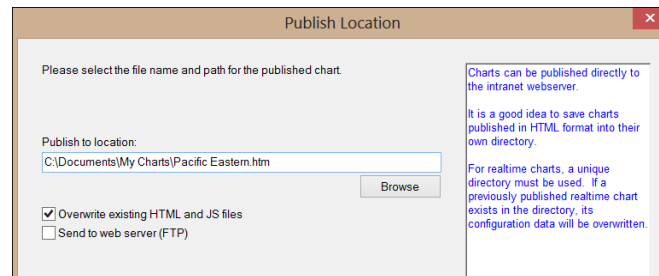


Figure 11.

- Select **Overwrite existing HTML and JS files** if you do not customize the produced HTML. Review information on using alternate VAB file location.
- Select **Send to web server (FTP)** if applicable

PluginX Password Protection Dialog

- Select the **Password protect this chart** check box.



Figure 12.

- Type the **Password** you want to use.
- Select the level of encryption.
- If applicable, select **Allow Remember my password**.

EChart Output Options

Additional dialog options are available with the EChart publishing selection.

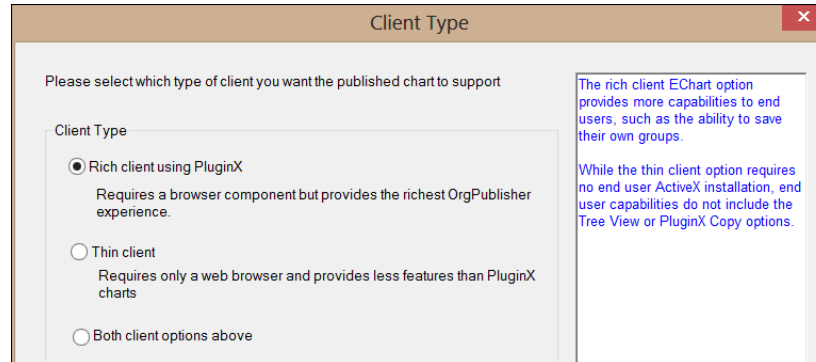


Figure 13.

You are prompted to select Rich client, Thin client, or both chart types. Review additional document on the [Support Portal](#) Web page for more details.

EChart Server Location and Maximum Levels

EChart publishing definition must identify the location of the EChart server. Your IT implementation team can provide this information to you.

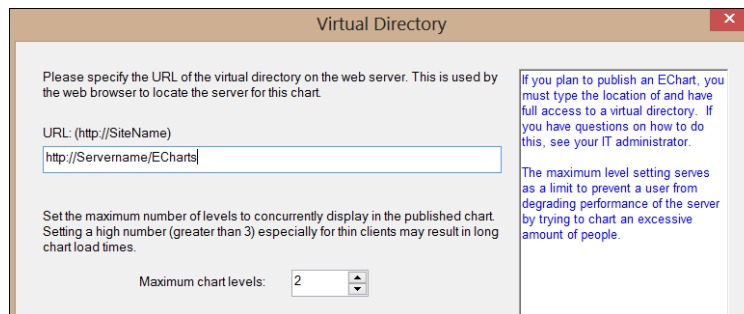


Figure 14.

You can also set the maximum levels to display in the published EChart. Lower numbers are the best option with large organizations, especially when publishing EChart thin client.

EChart Security

User authentication options are available when publishing using the EChart format.

Figure 15.

Options include:

- **Unsecured** – no authentication, all users can view the complete chart
- **Active Directory authentication** – the EChart server recognizes users by network login and password
- **System user ID/box linkage** – the EChart server recognizes user by local account information
- **Chart** authentication – the server prompts users to provide user ID and password; select the fields containing the password and user ID, as well as the format of the user ID
- **Starting box in chart** – controls the top box where users can open the chart; choosing the **Box ID** option requires selecting the field containing the identifying information
- **Reverse proxy** – OrgPublisher retrieves the user ID from HTTP header; the **Variable** option defaults but you can override the field; if applicable accept the **Passed as a cookie** option or clear the checkbox
- **Allow users to drill up from starting box** – leave check box cleared to prevent users from drilling upward to other areas of the chart

Default Style and Reset Starting Box

If there is more than one style in the chart, you must select the style you want to display when the published chart is opened.

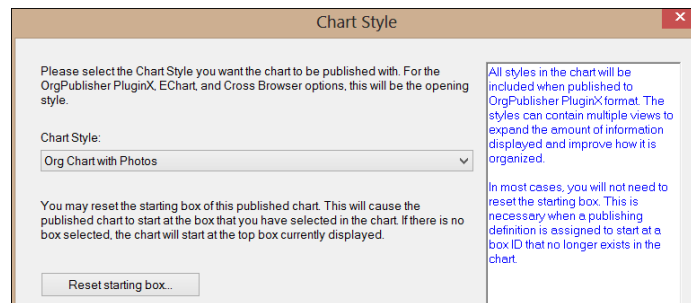


Figure 16.

If you want to change the top of chart box click **Reset starting box** to choose a new top of chart.

Publishing Error Notification

Select this option if you want to generate an email message when data errors are discovered at publishing time, and type the email address(es) where the message should be sent.

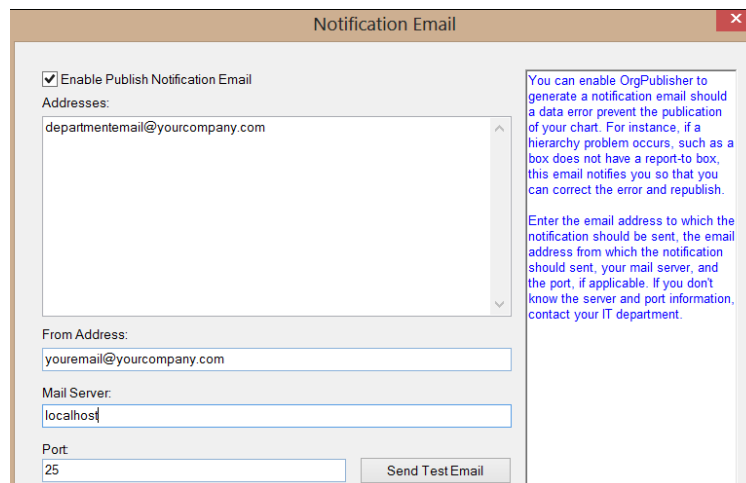


Figure 17.

Provide your email address and the **Mail Server** name, if the field does not populate automatically.

Published Chart Color Scheme Palette

Identify the color scheme that works best with your intranet theme or create your own, as noted in the section below.

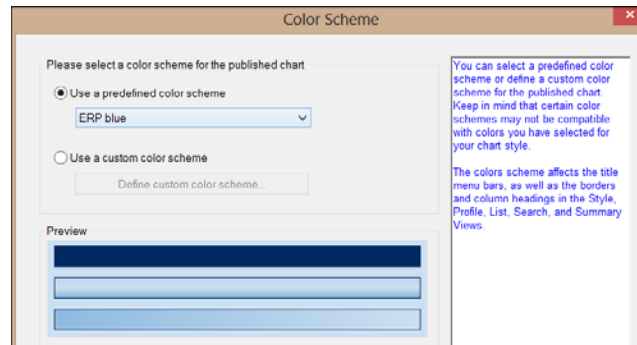


Figure 18.

Color Schemes to Blend with Intranet Palette

Configure your own color formats by selecting **Use a custom color scheme** and clicking **Define custom color scheme**.

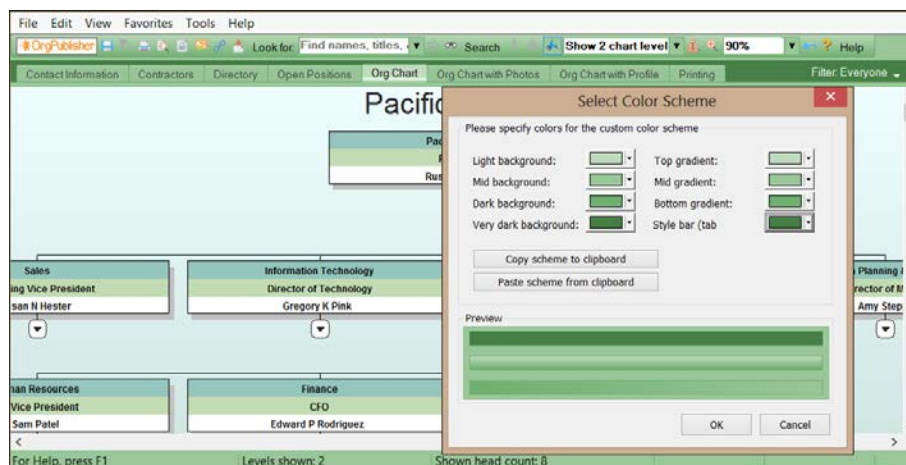


Figure 19.

You can **Copy scheme to clipboard** to save for use in another chart. When publishing the other chart, click **Paste scheme from clipboard**.

Toolbar Options

You can choose the toolbars and buttons to display in the published chart. By default, all toolbars and most buttons appear in the published chart. Clear the check box adjacent to the toolbars or buttons you do not want shown in the chart.

Secured ECharts also allow you to restrict group access to selected buttons. See the Toolbar Button Security section for details. Buttons shown with an asterisk are not available to users of thin client charts.

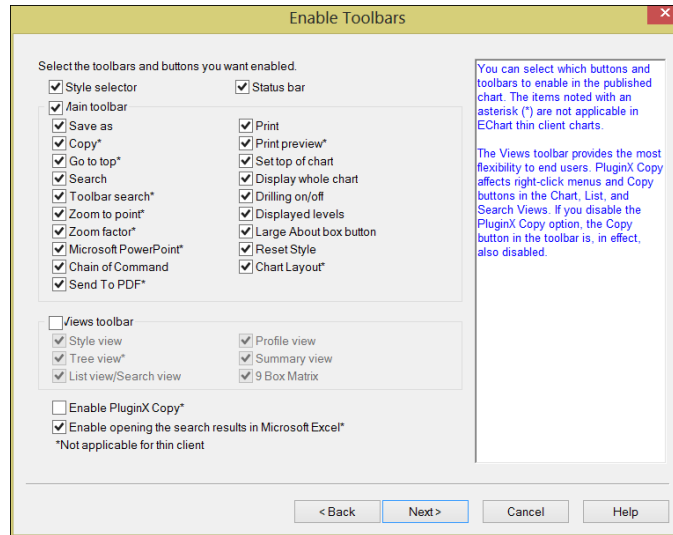

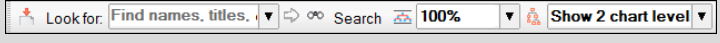


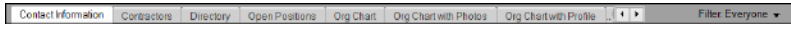
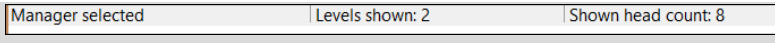



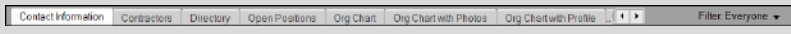
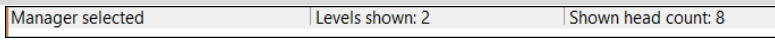


Figure 20.










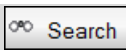





Toolbars and Buttons Defined











Published Chart Toolbar	Name	Definition
	Main Toolbar	Displays buttons for standard window tasks, navigation, and options enabled by administrator.
	Navigation Toolbar	Helps you move through the chart and find information.
	Layout, Views, and Help Toolbar	Select chart layout, views enabled by chart administrator, and open the help file.
	Style Bar	Tabs switch to other available styles and groups.
	Status Bar	Shows position type selected, number of displayed levels and shown head count.





Org Modeling Toolbar	Name	Definition
	Main Toolbar	Displays buttons associated with standard window tasks, as well as change report and email options.
	Navigation Toolbar	Helps you move through the chart and find information.
	Layout and Insert Toolbar	Contains buttons to set chart layout and add components.
	Views and Help Toolbar	Select views enabled by chart administrator, and open the help file.
	Style Bar	Tabs switch to other available styles and groups.
	Status Bar	Shows position type selected, number of displayed levels and shown head count.

Succession Planning Toolbar	Name	Definition
	Main Toolbar	Displays buttons associated with standard window tasks, as well as change report and email options.
	Navigation Toolbar	Helps you move through the chart and find information.
	Layout, Views, and Help Toolbar	Select chart layout, views enabled by chart administrator, and open the help file.
	Style Bar	Tabs switch to other available styles and groups.
	Status Bar	Shows position type selected, number of displayed levels and shown head count.








Buttons and toolbars in published charts must be enabled by the chart administrator.










Published chart Main Toolbar Button	Button Name	Button Definition
	Copy	Sends a copy of the selected text or object to the clipboard and leaves the text or object on the screen.
	Paste	Copies the contents of the clipboard to the screen.
	Print	Prints the chart. Prints a specific chart view if it is selected in Print Options or the Print Wizard dialog.
	Print preview	Displays the chart as it will look when you print it and is only available in the Chart View. You can modify the chart layout.
	Print setup	Opens the system Print Setup dialog.
	Send to Microsoft PowerPoint	Opens the Microsoft PowerPoint Preview dialog in order to prepare the chart to send to Microsoft PowerPoint.
	Go to top of displayed chart	Moves the Chart View to the top center of the displayed drilling level.
	Search from toolbar	Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Go (for toolbar search)	Starts the chart search on a box-to-box basis for the next instance of a matching record. Searches based on text you enter in the adjacent toolbar field or select from the drop-down list. You can type two words, such as first name and last name, and then press Enter to begin the search.
	Open advanced search dialog	Opens the Search dialog at the Name tab.
	Zoom to point	Makes a selected box the center of the chart display.
	Zoom percent	Sets the zoom percent for the chart display.
	Set top of chart	Displays the selected box and reporting boxes in the center of the Chart View.
	Display whole chart	Displays the chart from the highest box in the hierarchy.
	Drill up and Drill down	Enables the drill buttons in your chart which facilitate navigation between shown and hidden levels.





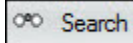












Published chart Main Toolbar Button	Button Name	Button Definition
	Levels	Selects the number of levels from the drop-down list that you want to display.
	Select the layout style for this chart	Displays four options to change the chart layout.
	Chain of command	Turns the Chain of Command mode on or off. Displays the selected chart record and all reports to upward to the top of the chart.
	Style View	Opens and closes the Styles View, which displays the styles available for the open chart.
	Tree View	Opens and closes the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.
	List/Search View	<p>Opens and closes the List View. The List View pane shows records data, such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted.</p> <p>The Search View pane enables you to conduct a search for specific information, and to create and save a new group. Click on a name in this list to locate it in the chart. Columns can be sorted.</p>
	Profile View	Open and closes the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Summary View	Open and closes the Summary View, which displays summary fields and totals by position type and group. You can also display this information in a graph.
	9 Box Matrix View	Opens and closes the 9 Box Matrix, which enables you to evaluate your organization's talent pool using comparative sets of data.
	Help	Opens the web page containing the PDF help document.

Org Modeling Toolbar Button	Button Name	Button Definition
	Save	Saves the chart. If this is a new chart, the Save As dialog displays so that you can assign a name to the file.
	Send chart to another person	Opens the Email OrgPlan dialog to select components you want to send, then opens your email client.
	Generate a change report	Opens the Change Report Options dialog to select components you want to include in the report.
	Cut	Sends the selected text or object to the clipboard and deletes the text or object from the screen.

Org Modeling Toolbar Button	Button Name	Button Definition
	Paste	Copies the contents of the clipboard to the screen.
	Print	Prints the chart. Prints a specific chart view if it is selected in Print Options or the Print Wizard dialog.
	Print Preview	Displays the chart as it will look when you print it and is only available in the Chart View.
	Print setup	Opens the system Print Setup dialog.
	Send to Microsoft PowerPoint	Opens the Microsoft PowerPoint Preview dialog in order to prepare the chart to send to Microsoft PowerPoint.
	Go to top of displayed chart	Moves the Chart View to the top center of the displayed drilling level.
	Search from toolbar	Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Go (for toolbar search)	Starts the chart search on a box-to-box basis for the next instance of a matching record. Searches based on text you enter in the adjacent toolbar field or select from the drop-down list. You can type two words, such as first name and last name, and then press Enter to begin the search.
	Open advanced search dialog	Opens the Search dialog at the Name tab.
	Compact	Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes.
	Zoom percent	Sets the zoom percent for the chart display.
	Display whole chart	Displays the chart from the highest box in the hierarchy.
	Levels	Selects the number of levels from the drop-down list that you want to display.
	Select the layout style for this chart	Displays four options to change the chart layout.
	Insert a box containing an open position	Inserts a normal box containing an open position field.
	Insert box containing a person	Inserts a normal box containing person and job fields into the chart.
	Insert box	Inserts a normal box into the chart.
	Insert job	Inserts a job field into a box in the chart.
	Insert person	Inserts a person field into a box in the chart.
	Insert open position	Inserts an open position field into a box in the chart.
	Insert assistant	Inserts an assistant box into the chart.
	Insert partner box	Inserts a partner box into the chart.

Org Modeling Toolbar Button	Button Name	Button Definition
	Style View	Opens and closes the Styles View, which displays the styles available for the open chart.
	Tree View	Opens and closes the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.
	List/Search View	Opens and closes the List View. The List View pane shows records data, such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted.
	Profile View	Open and closes the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Summary View	Open and closes the Summary View, which displays summary fields and totals by position type and group. You can also display this information in a graph.
	9 Box Matrix View	Opens and closes the 9 Box Matrix, which enables you to evaluate your organization's talent pool using comparative sets of data.
	Context Help	Displays pop-up definition when clicked on a toolbar button.

Succession Planning Toolbar Button	Button Name	Button Definition
	Save	Saves the chart. If this is a new chart, the Save As dialog displays so that you can assign a name to the file.
	Send chart to another person	Opens the Email OrgPlan dialog to select components you want to send, then opens your email client.
	Generate a change report	Opens the Change Report Options dialog to select components you want to include in the report.
	Cut	Sends the selected text or object to the clipboard and deletes the text or object from the screen.
	Paste	Copies the contents of the clipboard to the screen.
	Undo	Reverses, the latest action. May be repeated to undo additional actions. You can undo content-related changes, such as adding, deleting, moving, and copying information.
	Print	Prints the chart. Prints a specific chart view if it is selected in Print Options or the Print Wizard dialog.
	Print Preview	Displays the chart as it will look when you print it and is only available in the Chart View.
	Print setup	Opens the system Print Setup dialog.

Succession Planning Toolbar Button	Button Name	Button Definition
	Send to Microsoft PowerPoint	Opens the Microsoft PowerPoint Preview dialog in order to prepare the chart to send to Microsoft PowerPoint.
	Go to top of displayed chart	Moves the Chart View to the top center of the displayed drilling level.
	Search from toolbar	Searches are based on text you enter in the toolbar field or select from the drop-down list, if previous toolbar searches have been performed. You can type one or two words, such as first name and last name. Searches all fields one field at a time.
	Go (for toolbar search)	Starts the chart search on a box-to-box basis for the next instance of a matching record. Searches based on text you enter in the adjacent toolbar field or select from the drop-down list. You can type two words, such as first name and last name, and then press Enter to begin the search.
	Open advanced search dialog	Opens the Search dialog at the Name tab.
	Compact	Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes.
	Zoom percent	Sets the zoom percent for the chart display.
	Display whole chart	Displays the chart from the highest box in the hierarchy.
	Levels	Selects the number of levels from the drop-down list that you want to display.
	Select the layout style for this chart	Displays four options to change the chart layout.
	Style View	Opens and closes the Styles View, which displays the styles available for the open chart.
	Tree View	Opens and closes the Tree View, which displays the chart in an outline format. Click on a position or name to locate it in the chart.
	List/Search View	Opens and closes the List View. The List View pane shows records data, such as telephone numbers and office locations and is used as the index for a chart printed in Book style format. You can click on a name in this list to locate it in the chart. Columns can be sorted.
	Profile View	Open and closes the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type.
	Summary View	Open and closes the Summary View, which displays summary fields and totals by position type and group. You can also display this information in a graph.
	9 Box Matrix View	Opens and closes the 9 Box Matrix, which enables you to evaluate your organization's talent pool using comparative sets of data.
	Context Help	Displays pop-up definition when clicked on a toolbar button.

EChart Toolbar Security

You can secure access to toolbars when you publish as EChart rich client. You can also assign access to toolbar buttons to specific groups.

1. Once your chart is complete and custom fields have been set for specific groups only, open the *Publishing Wizard*.
2. Select a method to secure the chart when you reach the *Security Options* dialog.
3. In the *Enable Toolbars* dialog, open locks appear adjacent to each securable field. Click on the lock to view the secure options.

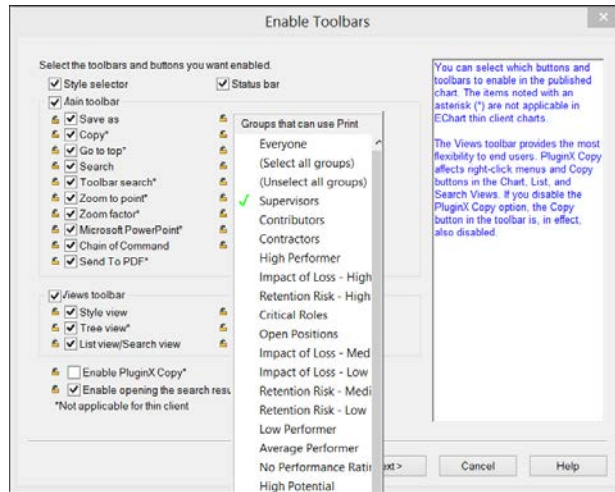


Figure 21.

4. Select the groups you want to have access to the button feature and click outside of the displayed list to close it and secure the field. The lock is now closed to indicate the field is secured to the selected groups only.

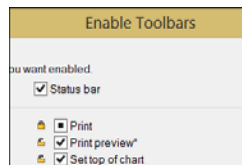


Figure 22.

Enable Organizational Planning or Succession Planning

You can publish your chart for organizational modeling or succession planning using PluginX and EChart rich client.

1. Open the *Publishing Wizard* and follow the dialog prompts.
2. In the *Enable Planning* dialog of the wizard, select the checkbox for one or both planning options

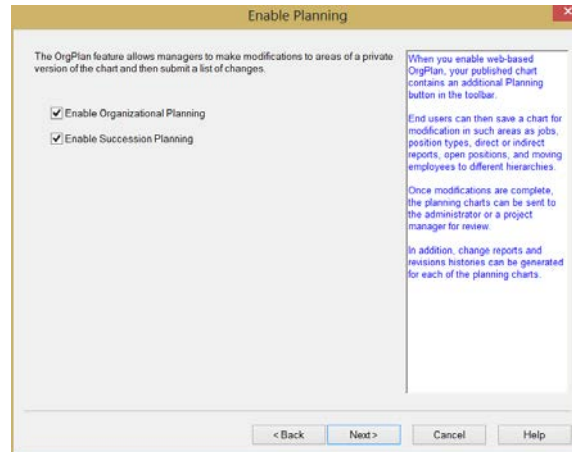


Figure 23.

Planning Chart Settings

When you enable planning, OrgPublisher provides additional options for you to choose.

- **Enable revision history** forces a prompt for plain text notes about changes made when users save the planning chart.

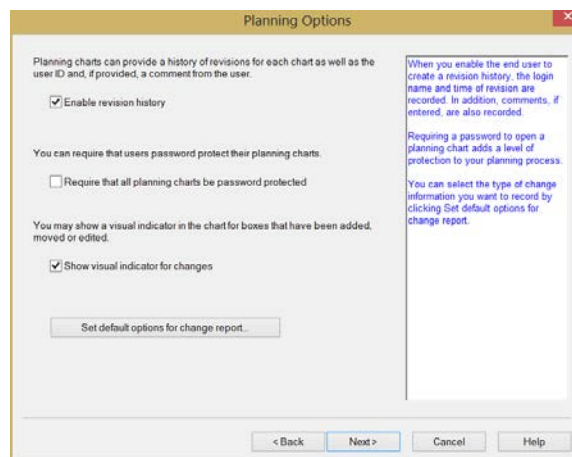



Figure 24.

- **Require that planning charts be password protected** prevents users from saving the planning chart without setting a password.
- **Show visual indicator for changes** places an edit icon  in the top-right corner of any box where changes have been made in the planning chart.

Set Default Options for Change Report

In the *Publishing Wizard*, the *Planning Options* dialog allows you to select set the default data points and format for the change report.

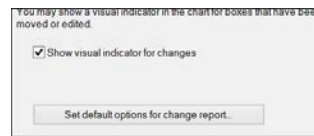


Figure 25.

Clicking the **Set default options for change report** button opens the Change Report Options dialog at the **Change Report** tab.

Generate Report Tab

The **Create summary section** in the top portion of the dialog displays several summary data options you can include in the report.

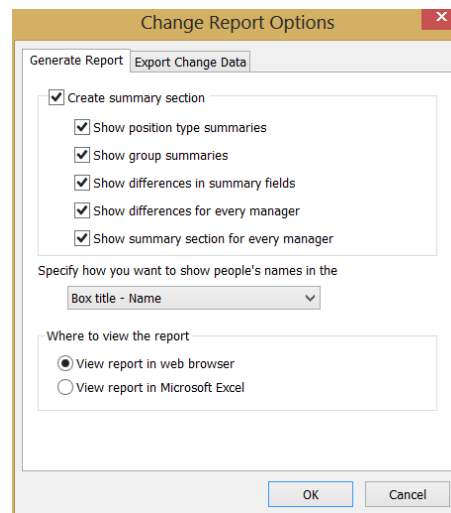


Figure 26.

- The **Specify how you want to show people's names** option in the center of the dialog allows you to select the display of employee names in the report. Click the drop-down arrow and choose from display the box title and the person's name, job title and the person's name, the person's name and box ID, or the person's name and person ID.

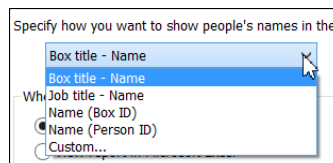


Figure 27.

- The **Box title – Name** option is the default selection.

The **Custom** option opens the *Custom Name Format* dialog that allows you to build the custom format.

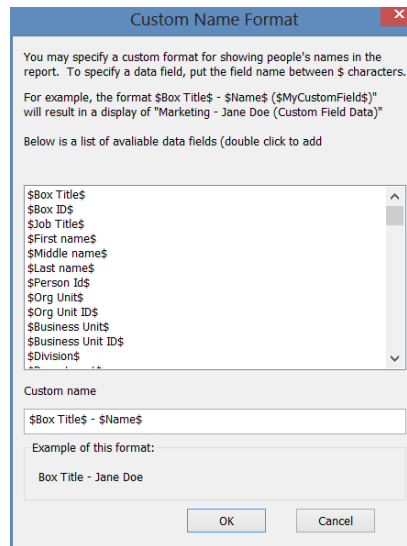


Figure 28.

The default shown in the **Custom name** field is also **\$Box title\$ – \$Name\$**. This indicates that the box title and the person’s name will both appear in the report.

An example of how the selected field displays in the report appears at the bottom of the dialog. You can delete text by selecting it and pressing **Delete** on your keyboard. Select the records you want and click **OK**.

Export Change Data Tab

Select this tab is you want to generate a Microsoft Excel spreadsheet for all changes. The **Parent Box ID** must be selected if you expect to see the current and previous parent box IDs.

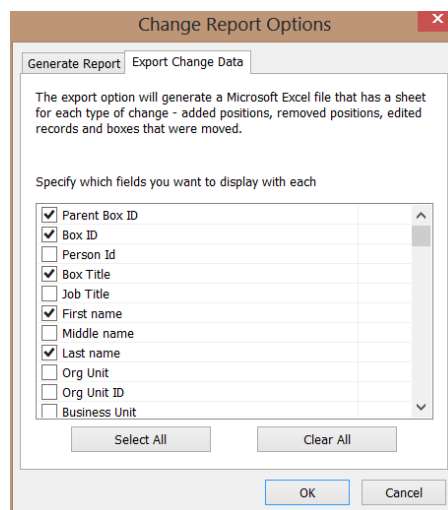


Figure 29.

OrgPublisher creates a work sheet each for changed records, added records, and deleted records and boxes.

	A	B	C	D	E	F	G	H	I
	Parent Box ID	Previous Parent Box ID	Box ID	Previous Person ID	Box Title	Job Title	First name	Last name	
2	106	37	433	15654			Joshua	LaPorte	
3	106	38	216	216			Hannah	Coleman	
4	37	38	206	206			Caren	King	
5	106	38	203	203			Sharon	Stuart	
6	37	38	205	205			Denise	Grace	
7	106	38	201	201			Karie	Jameson	
8	106	38	204	204			Sally	Johnson	
9	23	38	106	5186		Sr Writer	Kirk	Spudder	
10	106	38	210	210			Donita	Veccione	

Figure 30.

Planning Chart Storage for ECharts

When publishing an EChart rich client for planning you can also allow end users to store those charts on local drives or on the EChart server.

Planning Storage

With secure ECharts, there are two options for where to store the planning charts.

Store planning charts on the user's local hard drive.
With this option, charts may be shared with other users via email.

Store planning charts centrally on the EChart server.
With this option, planning charts can be shared more easily. Each user will automatically have access to planning charts that exist at or below the user's section of the hierarchy.

Specify the folder on the web server that will be used to store planning charts. It is strongly recommended that this folder be secured so that it is accessible to the EChart server but not HTTP requests.

When enabling OrgPlan in secured ECharts, you can store the planning charts either on the end user's local hard drive or on the EChart server.

Storing the planning charts on the server makes sharing the charts very easy, but it is essential that the folder be properly secured. Please enter file path (not a URL) for the storage folder.

If you have questions about this, contact the Aquire Support Team.

< Back Next > Cancel Help

Figure 31.

Limiting Access with EChart Rich Client

Publishing a planning chart as EChart rich client allows you to control access through group membership, as long as the custom field security and publish wizard security features are activated.

The *Planning Group Security* dialog opens in the Publishing Wizard to select a group to create, view, and modify planning charts, as well as a group that can create planning charts for the entire chart hierarchy.

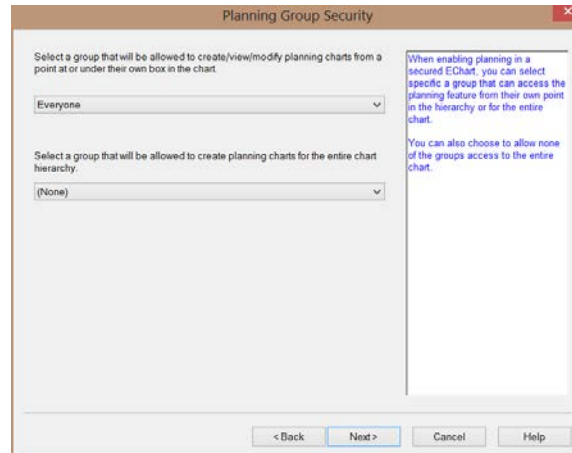


Figure 32.

Define Context Menus

Published charts allow access to certain functions through a context menu. As the mouse cursor hovers over a box component, the Context Menu button displays to the right of the box.

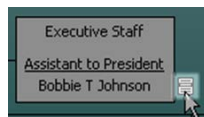


Figure 33.

The menu options vary, depending on the component selected, and are determined by the administrator during publishing. If a chart box contains more than one hotspot, each link is listed above the action options in the menu.

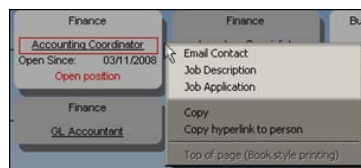


Figure 34.

The *Context Menu* dialog of the *Publishing Wizard* provides a list of several components in the chart that contain action options and are affected by security settings.

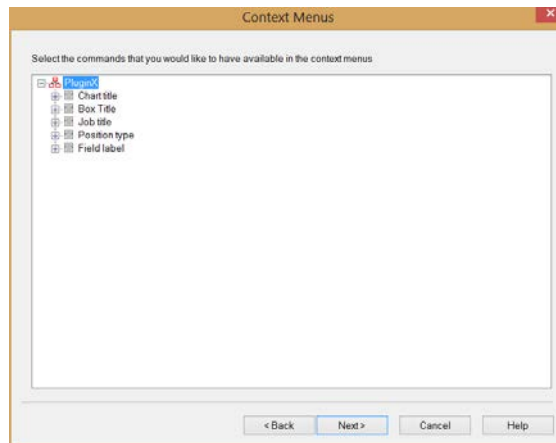


Figure 35.

Expanding the items in the list, allows you to select an action that the end user can perform, indicated by a green check mark ✓ in the left graphic, or select an action that the end user cannot access, indicated by a red X in the right graphic.

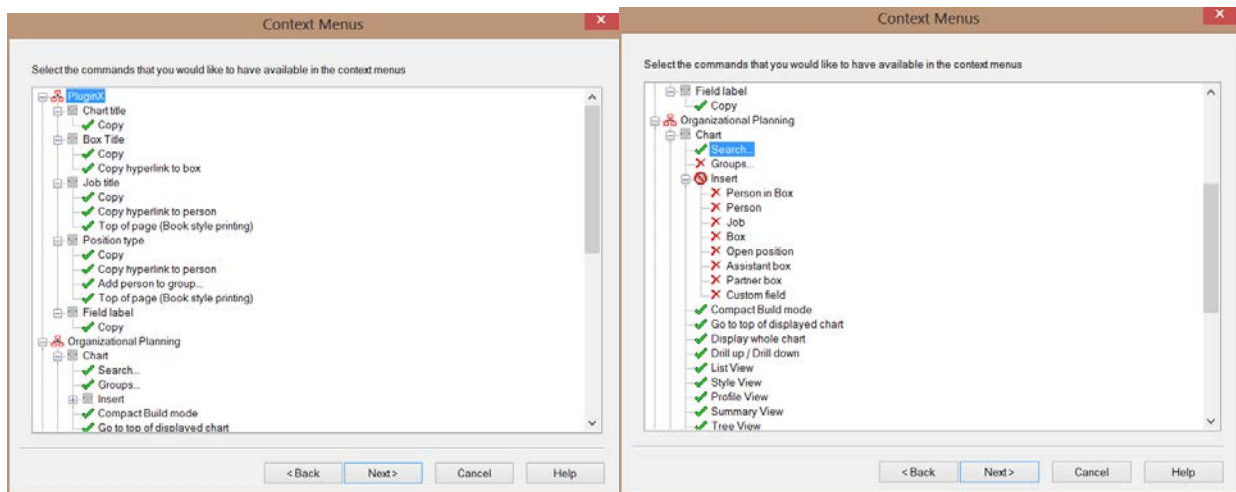


Figure 36.

If all actions under a component are removed or, if a field such as Box Title is restricted, then the Chart Action button does not appear for that area of the chart box. In the above example on the right, the Insert toolbar options are all restricted ⓧ, therefore the toolbar is not made available in the published chart.

Note: Copy options are available by selecting **Enable PluginX Copy** in the *Enable Toolbars* dialog in the *Publishing Wizard*.

Exclude Positions Above

If you select a box to be the top of the published chart before you have created that publishing definition, then the *Chart Options* dialog allows you to **Exclude positions above**. Selecting this option publishes a chart containing just that span of control, nothing that is shown above that hierarchical arm of the organization.

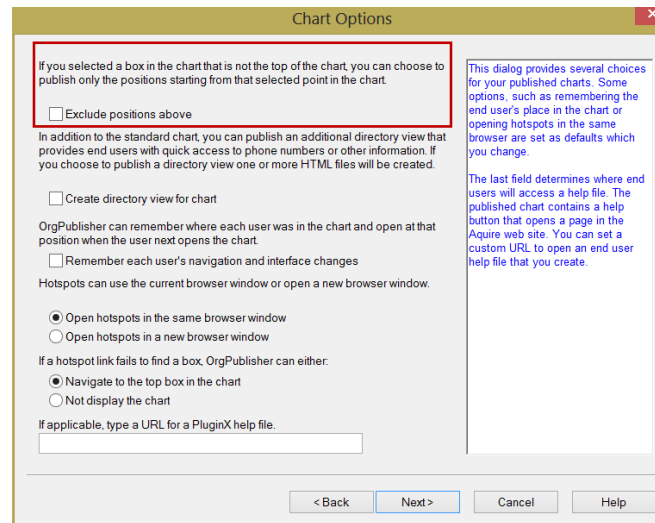


Figure 37.

Directory View

In the same dialog, *Chart Options*, you can **Create directory view for chart** that is based on the *List View* layout of the opening style. This format can be used as a telephone directory.

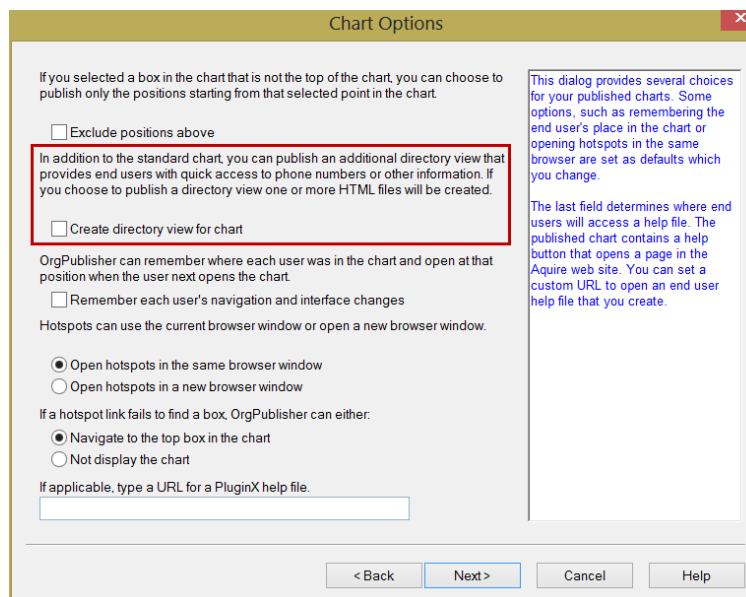


Figure 38.

Remember User's Navigation and Interface

Selecting this check box in the *Chart Options* dialog enables OrgPublisher to remember certain end user navigation and display choices for charts published as PluginX, EChart rich client and EChart thin client. Each time the end user opens the published chart, these settings are remembered, as long as they do not affect the behavior chosen by the chart administrator at publishing time.

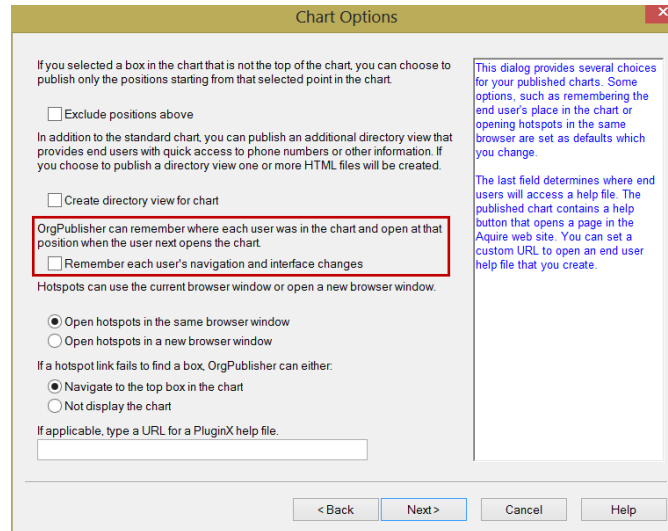



Figure 39.

Remembered settings:

PluginX only	PluginX and ECharts
Current style	Selected group
Pinned Style View	Current top of chart
Chart View zoom percent	Shown levels
Tree View and position in window	Drill buttons on or off
Graphs tab of Summary View	List View and position in window
	Profile View and position in window
	Selected pane, either List View or Search View
	Graphs tab of Summary View

Only one set of settings can be saved per chart. If the toolbar button is enabled by the chart administrator, the end user can reset  saved options.

Situations in which the administrator choices overrule the end user choices include:

- If the end user selects a specific style but that style has been removed by the administrator, then the default style opens in the published chart.
- If the end user turns on a view, such as the Summary View, but the administrator disables that view, then the end user cannot access it in the published chart.
- If the end user has access to a secured style but then the user is removed from the group allowed access to that style, then the next time the published chart is opened, the default style opens and user can no longer access the secured style.

Hotspots

The *Chart Options* dialog allows the administrator to choose between opening the hotspot link to use the current browser or open a new browser window.

In addition, if a link fails to find a box in the chart, the administrator can direct OrgPublisher to either go to the top of the chart or not display the chart at all.

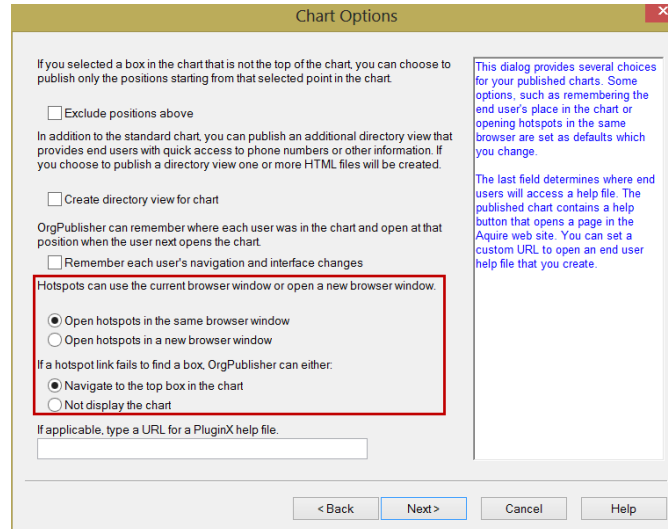


Figure 40.

Custom Help File

The toolbar help button in a published chart opens to a web page to access a PDF help document. The administrator can choose to point to a customized help file, if applicable.

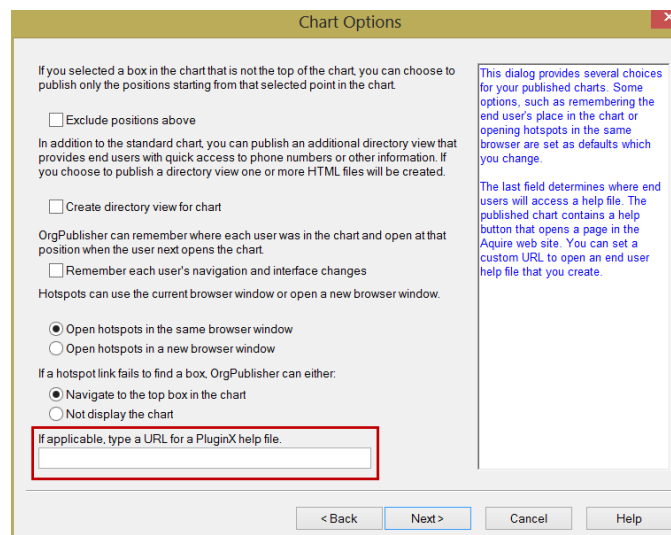


Figure 41.

Email and Visually Impaired Options

In the *Email and Accessibility* dialog of the *Publishing Wizard*, the administrator can set the maximum number of emails that are sent at one time by the end user, if an Email type custom field is included in your chart data.

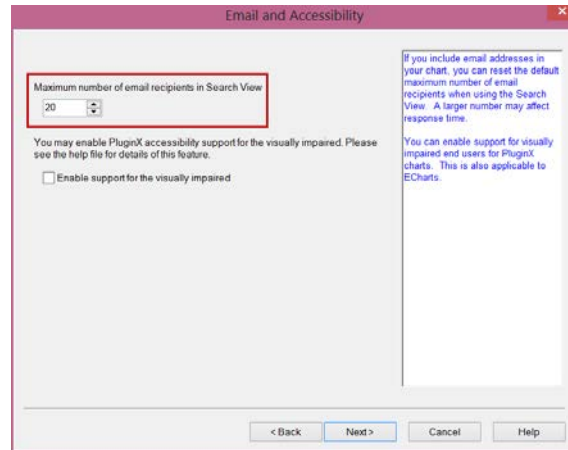


Figure 42.

The same dialog also enables the PluginX chart to support visually impaired if client uses the JAWS® screen reading software.

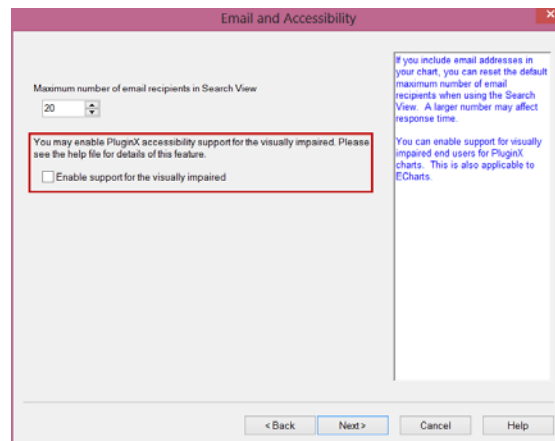


Figure 43.

Archive Scheduling

The *Archive* dialog in the *Publishing Wizard* gives you the option to set a schedule to archive your published chart. The archived files can be compared using a change tracking report. We recommend that you archive your charts at the same interval that you publish your charts.

The archive option is disabled by default. Select **Keep an archive of the chart** to enable this option.

Type the location of the secured folder where you want to store the archive and choose the interval.

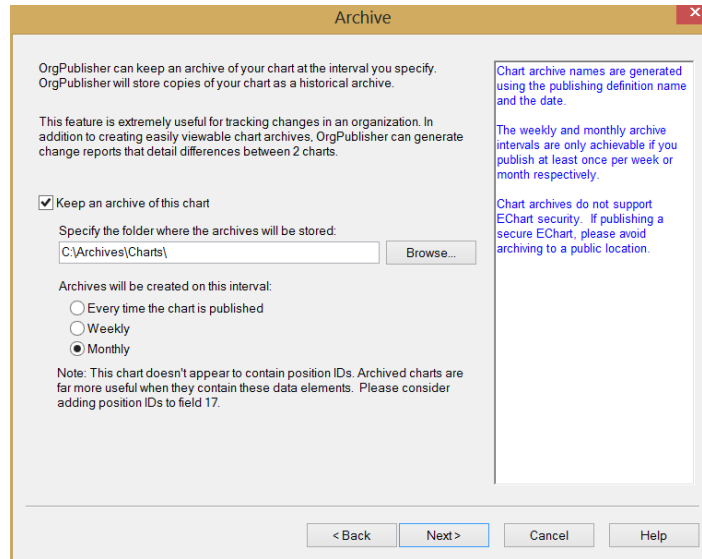


Figure 44.

Publishing

The final dialog in the *Publishing Wizard* allows you to publish your chart immediately or to keep the publishing definition available to publish later. When you select **Publish Now**, a link dialog, as shown below on the right, displays the URL to open the chart.

When you select **Publish later**, you can use the [Publish charts dialog](#) to publish or schedule the publish time for the chart.

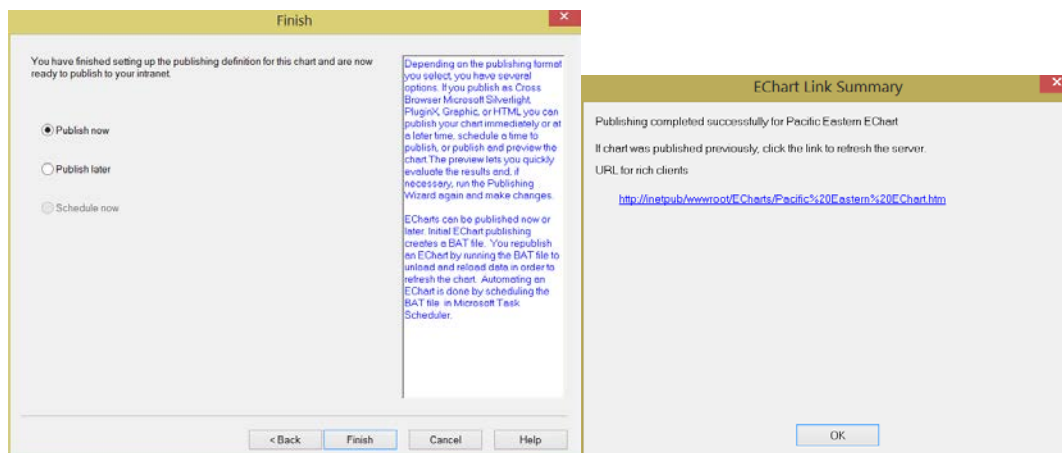


Figure 45.

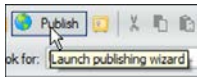
The **Schedule Now** option is not available for the EChart publishing format which requires some setup on the EChart server. See the [Scheduling ECharts](#) section of this document for details.

Advanced Mode Publishing Documents

OrgPublisher gives you the option to publish your chart data as documents. These publishing formats provide less interactive options.

- **PDF** – Creates a PDF document that you can email or place on your intranet and open with Adobe® Reader® software.
- **HTML** – Creates an HTML page and graphic for each drilled, if applicable, chart page.
- **Graphic** – Creates a graphic image of the chart.

Publishing Wizard

The first time you click the Publish button in a chart , a wizard opens to guide you through the process. Dialogs vary in the *Publishing Wizard*, depending on your choices.

To select a document type, open the wizard and choose **Advanced Mode**.

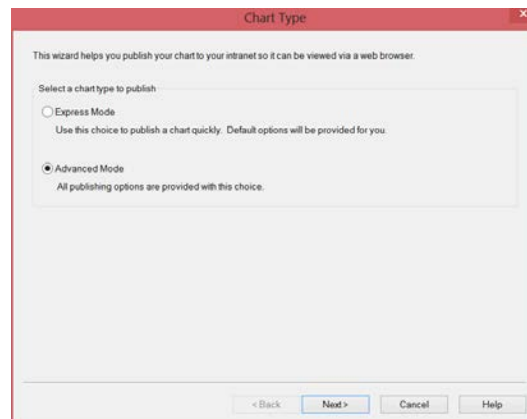


Figure 46.

Follow the dialog prompts and select **Org Chart Document**.

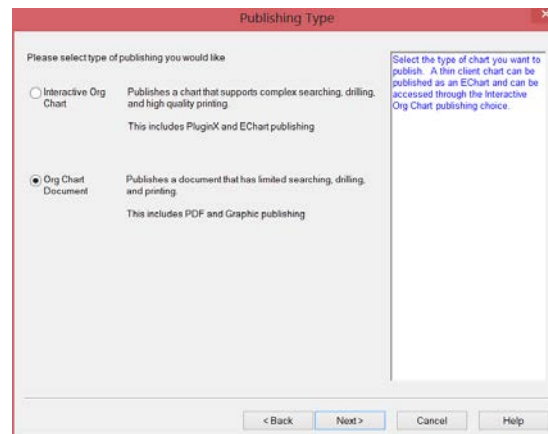


Figure 47.

Select the document type you want to publish.

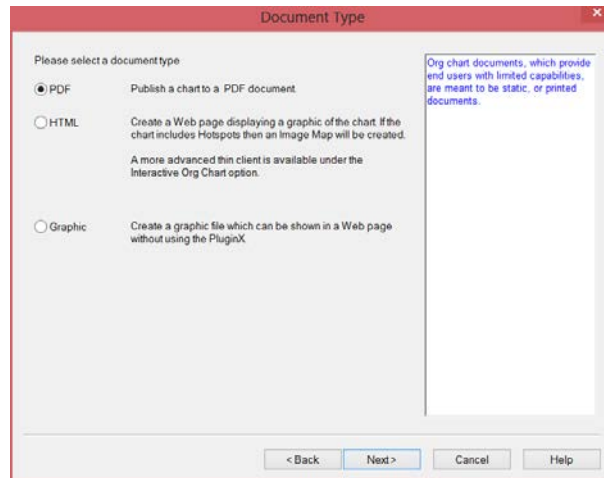


Figure 48.

Publish Location

The **Publish to location** includes your local drive or server information, as well as any associated folder or subfolder.

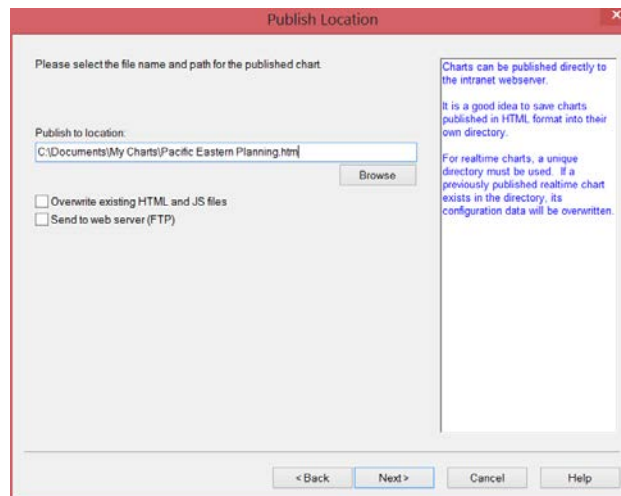


Figure 49.

In the same dialog, you can choose to overwrite HTML or JS files when publishing the current chart. You do NOT want to overwrite these files if you have customized them, for example to display special web elements, or you will lose your modifications.

See the **Alternate CAB File Location** section of the [OrgPublisher PluginX Implementation](#) guide for more details.

Default Style and Reset Starting Box

The *Publishing Wizard* prompts you to select an opening style in the published chart.

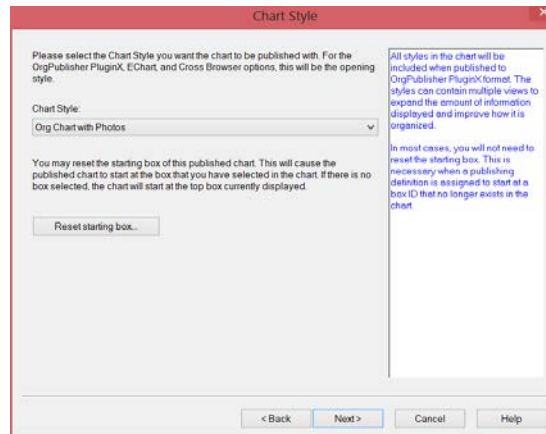


Figure 50.

If you navigated to a chart box other than the top of chart before you started publishing, you can click **Reset starting box** to confirm that you want to selected box to be the opening top of the chart.

Publishing Error Notification

If applicable, you can identify who should be notified if there are data errors at publishing time.

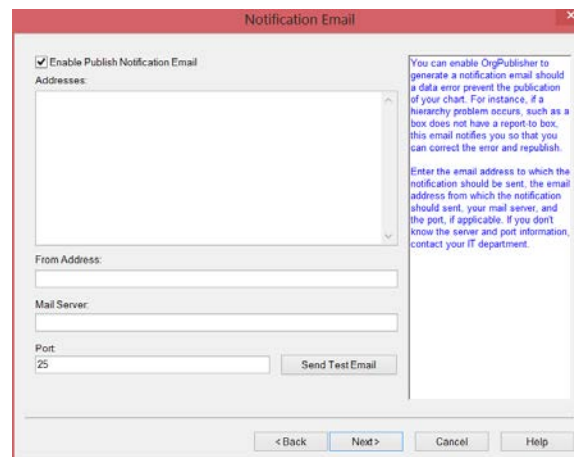


Figure 51.

PDF Page Layout

By default, PDF output uses the settings saved in Book Style print preview. If the preview hasn't been used, this dialog contains settings to control page layouts in the PDF without a preview option.

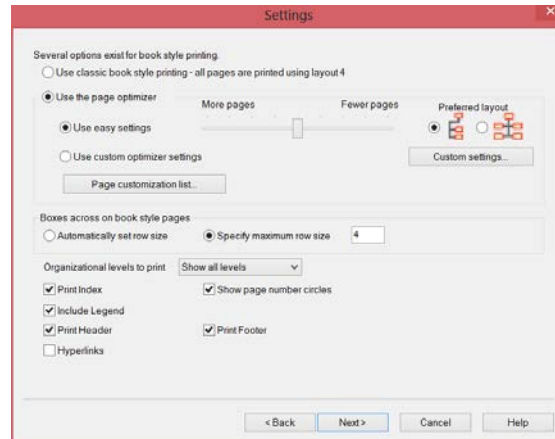



Figure 52.

- **Use classic book style printing** – chart pages are set to two levels in Layout 4 
- **Use easy settings** – moving the slider allows for more or fewer pages in one of two layouts shown
- **Use custom optimizer settings** – click **Custom settings** to open the optimizer dialog

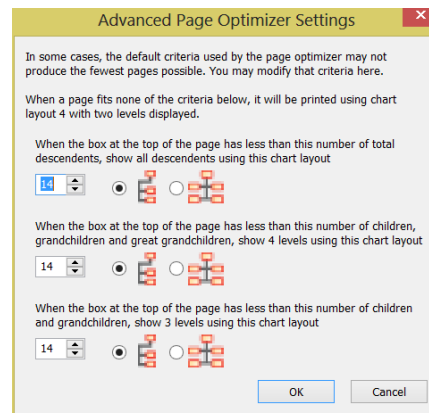


Figure 53.

- **Advanced Page Optimizer Settings** – control the output for each page by selecting the criteria you want to use in the three scenarios shown in the dialog

Page Customization List

If you used the print preview to customize Book Style page settings, then the list of those pages appears in this dialog. You can choose to keep those customizations or clear all or selected pages in order to use the settings you chose in the page optimizer.

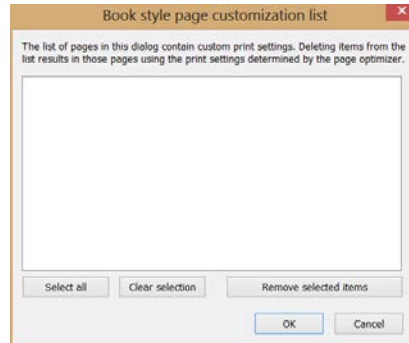


Figure 54.

Boxes Across on Book Style Pages

You can specify the maximum number of boxes displayed across the page when using Layout 4 (wrapping stacked boxes) or let OrgPublisher determine that number automatically

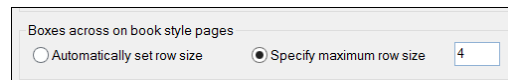


Figure 55.

Organizational Levels to Print

Select the number of levels down from the top of chart that you want to print.

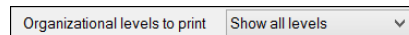


Figure 56.

The final options available in the *Settings* dialog include the following items. A check mark indicates the option is selected.



Figure 57.

Print Index

This option uses the current style’s List View layout to print the index at the beginning of the document. Each record includes the page number where it can be found.

Show page number circles

Displays page number circles instead of drill buttons to indicate where the hierarchy continues in the document. These page numbers can be links if the **Hyperlinks** option is also selected.

Include Legend

This option is available if the selected style uses a legend. The legend prints on each page.

Print Header

Places a header on each page using the settings selected by the administrator in the print preview or, if the preview was not used, the OrgPublisher default settings.

Print Footer

Places a footer on each page using the settings selected by the administrator in the print preview or, if the preview was not used, the OrgPublisher default settings.

Hyperlinks

Enables the page number circles and any hotspots in the chart as active links.

PDF Page Size and Orientation

This dialog allows you to set page size, orientation and margins.

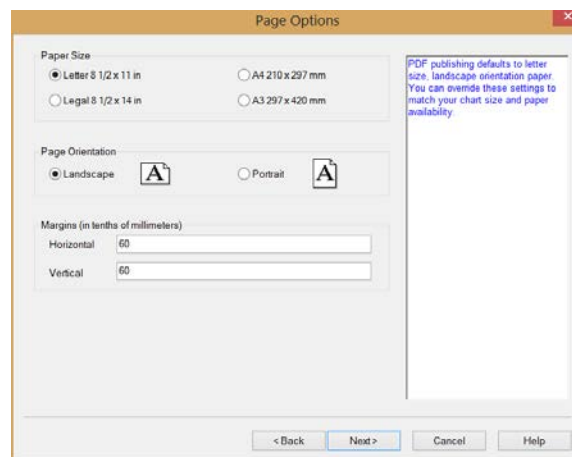


Figure 58.

PDF Font Embedding, Resolution and Image Options

This dialog allows you to choose options that can reduce the size of the chart file.

- **Font Embedding** – this selection copies chart fonts into the PDF wherever possible which increases the compatibility of the PDF file but also increases the size of the file
- **Printer Resolution** – set the print DPI (dots per inch), depending on your printer
- **Image Options** – options selected reduce the size of the PDF file; enabling the **JPEG Compression** is recommended when your chart includes photos

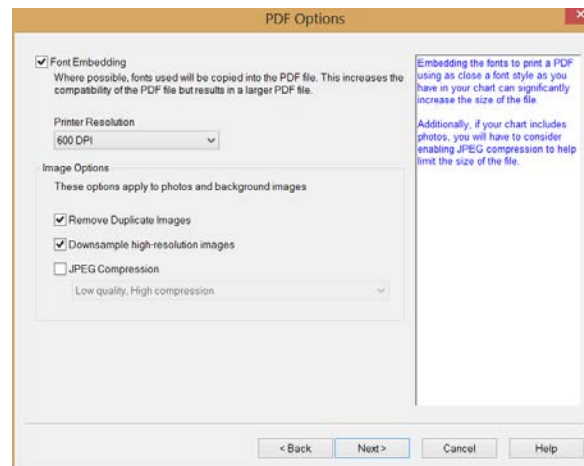


Figure 59.

HTML Drilling

When publishing in HTML you can elect to use drill buttons which generates multiple HTML pages and graphic images. And set the graphic image for clarity in chart photos.

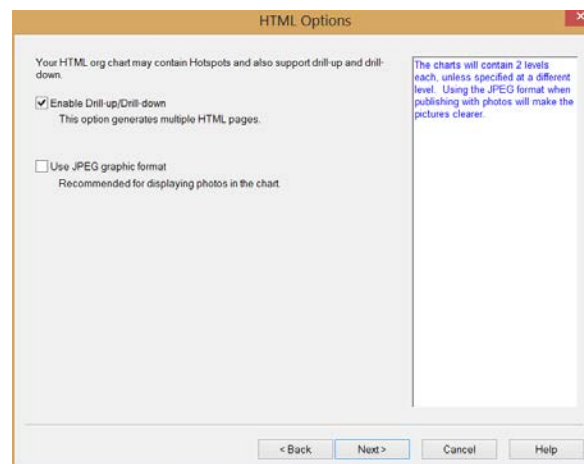


Figure 60.

Publishing

There are, typically, three publishing options presented if this is the first time you are publishing the selected format. This include setting a schedule to publish. Updating and republishing offer only the immediate and save but publish later options.

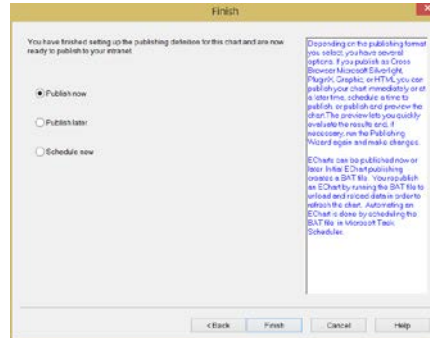


Figure 61.

Publishing Multiple Charts from a Single Formatted Chart

You can publish charts that focusing on a specific arm of the organization hierarchy. Select the top box of that area.

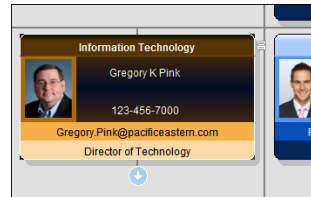


Figure 62.

The Publishing Wizard opens if there is not yet a publishing definition for this section of the chart. Follow the dialog prompts to complete the publishing process and click the link provided. Depending on your selections, users may or may not be able to drill up in the chart.

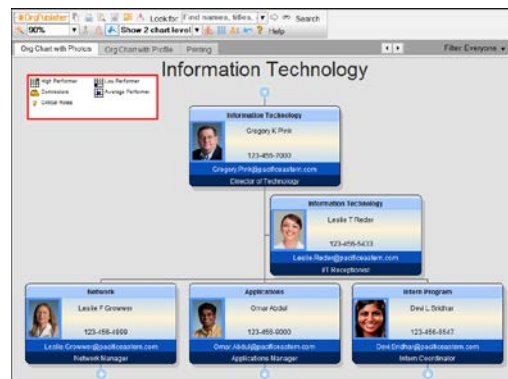


Figure 63.

Publish Charts Dialog

Once an active publishing definition exists, the *Publish charts* dialog opens when you click the **Publish** button in the toolbar. It opens to the **Publishing Definitions** tab and lists all current definitions with basic publishing information.

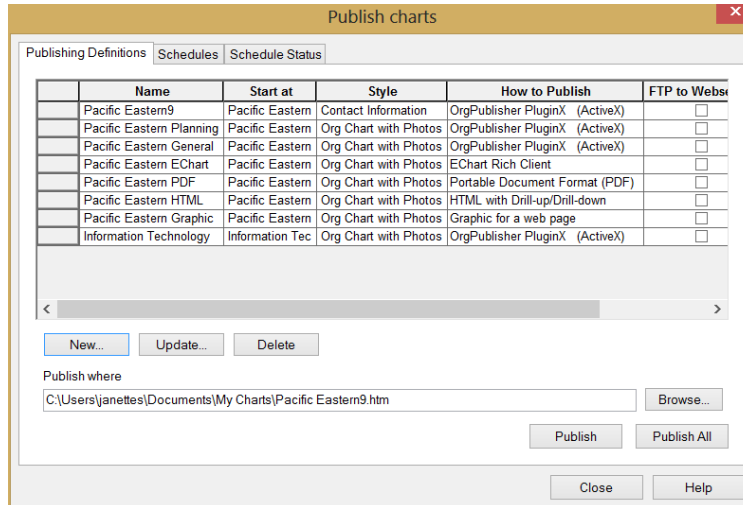


Figure 64.

Modifying an Existing Publishing Definition

You can change an existing publishing definition. Select a definition from the list in the *Publish charts* dialog and click **Update**. Following the *Publish Wizard* dialog prompts, make your changes to the definition.

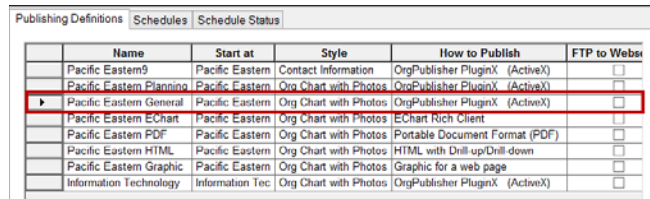


Figure 65.

Creating a New Publishing Definition

You can create new publishing definitions with the *Published charts* dialog. Click **New** and follow the *Publishing Wizard* dialog prompts.

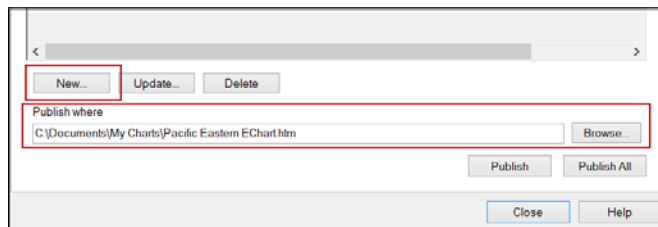


Figure 66.

Disabled Screen Capture in PluginX

When you publish a chart as PluginX, the **Alt+Print Scrn** function is disabled. End users cannot use these keys to take a screen shot of the published chart, but once they leave the chart, the function is active again.

Note: This does not prevent third party screen capturing software like TechSmith SnagIt® from taking screen captures.

Scheduled Publishing

OrgPublisher includes a publish feature that allows you to set the time and frequency for publishing charts.

Considerations:

- If you are required to FTP to your server, use the *Publishing Wizard* to include this information in your publishing definition.
- If a publishing definition already exists and you want to [set up a schedule](#), use the task scheduling wizard process noted below.
- If you are creating a new definition, the Publishing Wizard provides a scheduling option in the last dialog for most publishing formats using the **Advanced Mode** option.
- The OrgPublisher application must be closed in the machine where a job is scheduled to run.
- When [scheduling an EChart](#) publishing definition, use the Windows Task Scheduling function.

Scheduling When Creating a Publishing Definition

You can access the *OrgPublisher Automatic Task Scheduling Wizard* from the **Schedule now** option in the *Publishing Wizard* and the **Schedules** tab in the [Publish charts](#) dialog.

1. Complete the [Publishing Wizard](#) and select **Schedule now**. You are prompted to save the published chart first. Click **Yes**. The scheduling wizard opens. Click **Next**.
2. Follow the dialog prompts to set a name, frequency, and time for your schedule.

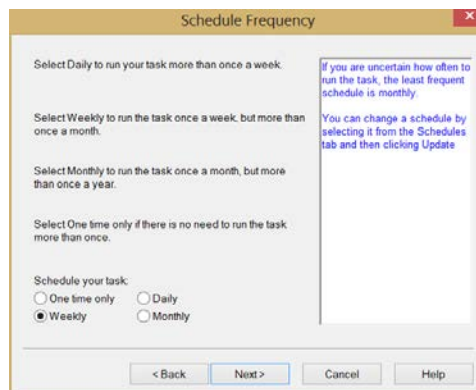


Figure 67.

The name of the schedule can be the same as the name of your publishing definition.

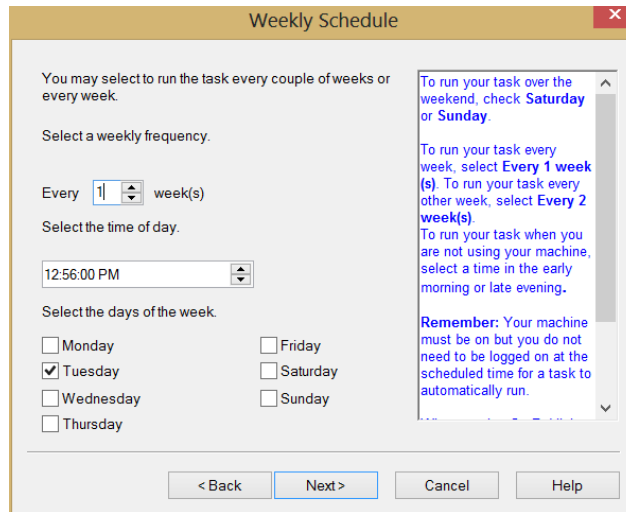


Figure 68.

3. Type your system user name and password. Click **Next** then **Finish**.

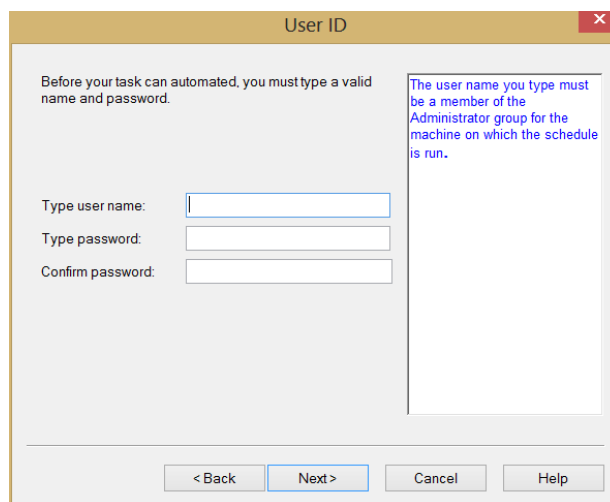


Figure 69.

Viewing, Editing, or Creating Publishing Schedules

You can use the *Publish charts* dialog to view, edit and create publishing schedules.

Note: The [EChart publishing schedule](#) feature is discussed in the following section.

The **Schedules** tab lists all scheduled publishing definitions and the last run date for that schedule. You can also create a **New** schedule, or **Delete** or **Update** an existing schedule.

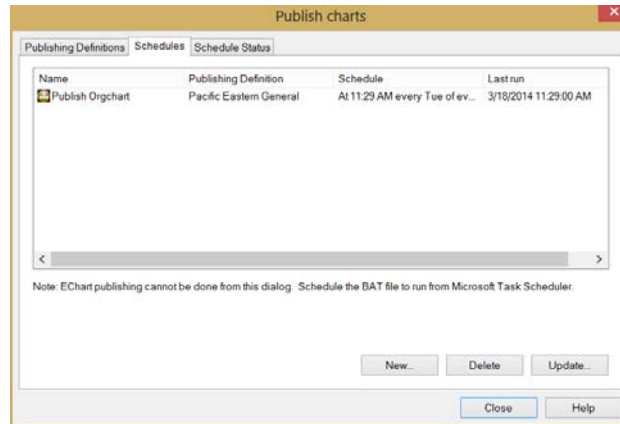


Figure 70.

The **Schedule Status** tab lists all publishing schedules and whether or not the process was successful, failed, or pending. The **View log** option opens Notepad with details of the scheduled task.

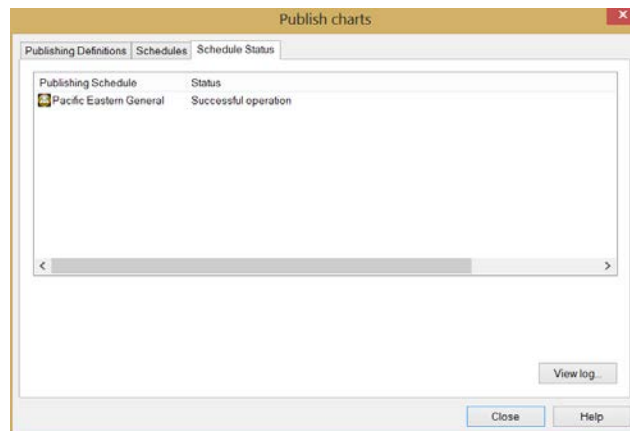


Figure 71.

OrgPublisher via Web Administration

The **Schedules** tab of the *Publish charts* dialog is not initially available in Web Administration.

1. Log on to the server as an administrator or power user.
2. Open the desktop OrgPublisher application.
3. Open the chart (found in the **SourceCharts** folder) and click **Publish**. The *Publish charts* dialog opens.
4. Select the **Schedules** tab and click **New** to create a new schedule. Or, select a schedule from the list and click **Update** to modify a schedule.

Note: If you schedule more than one publishing definition, verify that there is enough time for each schedule to complete before the next one begins. If not, data errors may occur if more than one schedule accesses the same data connection files at the same time.

Scheduling ECharts

EChart publishing is scheduled through Windows Task Scheduler.

1. Log on to the EChart server and publish the EChart one time using the *Publishing Wizard* to create a .BAT file.
2. Run the batch (.BAT) file. This file assumes that publishing and server processing occur on the same machine.
3. Open *Windows Task Scheduler* from the **Control Panel** (Windows 2000 and Windows XP) or **My Computer** (Windows NT) and double-click **Scheduled Tasks**.
4. Double-click **Add Scheduled Task** in the wizard and follow the dialog prompts to set up a scheduled task.

You can modify the batch file (.BAT) produced by the Publishing Wizard in order to publish to a location other than the web server. Doing this may minimize EChart downtime if your chart is extremely large (200,000+ records) or if resources are limited on the web server. EChart is very CPU intensive and may affect other processes running on the server.

To publish to a different location the following steps must be made in this order:

1. Move the EChart files to the server.
2. Unload the EChart from the server's memory.
3. Reload the EChart into the server's memory.

The batch file is not overwritten during publishing, so any modifications you make are preserved.

Testing a Publishing Schedule

To verify that your automatic schedule works, you can set the job to run one time two or three minutes after the current time on your machine. Then reopen the Publish charts dialog and scroll right to confirm a **Date Published**.