

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 <u>OrgPublisher Architecture Overview</u> in order to determine they 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

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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.

	blishing mode	
Chart	and the second	
Publishes a	a chart that can be viewed using Internet Explorer.	
O Chart with di	rectory view	
Publishes a	chart that includes a directory view of the organization.	HE
		6
	a chart to a PDF document.	4
Publishes (chance a - cr- document	
Name of Chart	Pacific Eastern	
Location	[/pacificeastern/documents/my documents/mycharts]	
		Browse

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.

*OrgPublisher	0 2 0 0 1	🐉 🔦 Look for: Find names, tit	les, etc.	- C 00 Sear	ch 🔍 100%	🔹 🏌 🥼 Show All chart levels 💌 🍰 🔗 🏢 🔐 🦛 💡 Help
ChainofCommand	Chart Directory	Chart Directory with Profile View	Groups	Job Postings	Printing	
			Pa	cific E	astern	

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.

)raPublisher

OrgPublisher Publishing Organization Chart Publishing

🖉 Pacific Eastern 1								
Search Groups My	groups							
Name:	✓ Last	First = Any Pa	rt of Field	▼ New search ✓ ∞ Go	×			
Name:	Job Title:	Box Title:	Phone	Email	State	Bldg	Office No.	Time Zone
🖈 Emily Abbott	Media Coordinator	Media	7018	Emily.Abbott@pacificeastern.com	CA			
📩 Lisa Abbott	Purchasing Agent 1	Finance	6028	Lisa.Abbott@pacificeastern.com	MA	Annex 2	A30	EST
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📩 Gail P Amster	Product Specialist	National	2277	Gail.Amster@pacificeastern.com		Sales Office	S18	CST
🛧 Caroline Anderson	Accts Rec/Cash Mgr	Finance	7010	Caroline.Anderson@pacificeastern.com	CA	Corporate	C82	PST
📩 Olivia K Bailey	Programmer	Business Applicati	6014	Olivia.Bailey@pacificeastern.com	MA			
📩 Henry K Banner	Writer	Collateral	8833	Henry.Banner@pacificeastern.com	CA	Corporate	C78	PST
📩 Mia P Bannister	Producer	Television & Cable	6999	Mia.Bannister@pacificeastern.com	CA	Corporate	C61	PST
📩 Elizabeth Bartlett	Capital Purchases	Finance	6020	Elizabeth.Bartlett@pacificeastern.com	MA	Annex 2	A35	EST
🖈 James Bates	Broadcast Media Planner	Broadcast	6633	James.Bates@pacificeastern.com	CA	Corporate	C301	PST
📩 Jeffrey A Bauer	Travel Specialist	National Sales	5388	Jeffrey.Bauer@pacificeastern.com	CA	Corporate	C100	PST
🖈 Justin Baxter	Purchasing Agent 2	Finance	6029	Justin.Baxter@pacificeastern.com	MA	Annex 2	A29	EST

Figure 7.









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.

Publishing Wizard	Publish	charts				×
This wizard helps you publish your chart to your intranet so it can be viewed via a web browser.	Publish	ing Definitions S	ichedules Sche	dule Status		1
		Name	Start at	Style	How to Publish	FTP to Webserver
Select a chart type to publish		Pacific Eastern	Pacific Eastern	ChainofCommand	OrgPublisher PluginX (ActiveX	
C Express Mode						
Use this choice to publish a chart quickly. Default options will be provided for you.						
Advanced Mode						
All publishing options are provided with this choice.						
	_	New Upd		ete		
	Pub	ish where	13			
						Browse
					Publis	h Publish Al
					10010	
					0	lose Help
< Back. Next > Cancel Help						
	1					

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.

			Pu	blishing Wizard		×
ublishing Wizard		×		Please select as a	nteractive publishing type	Interactive charts enable end
Please select type	of publishing you would like	Select the type of chart you want to publish. A thin client		PluginX	Publishes a chart that can be viewed using Microsoft Internet Explorer.	users to perform several tasks, such as searching and saving their own groups.
C Interactive Org Chart	Publishes a chart that supports complex searching, drilling, and high quality printing. This includes PluginX and EChart publishing	chart can be published as an EChart and can be accessed through the Interactive Org Chart publishing choice.		C EDhart	Rublishes an estremely large, secure, or HTML-only chart. Supports Microsoft Internet Epplorer. Requires an ISAPI-compilant web server.	The EChart thin client format provides similar functions and requires no client ActiveX installation.
Org Chart Document	Publishes a document that has limited searching, drilling, and printing. This includes PDF and Graphic publishing					
				blishing Wizard	< Back Next >	Cancel Help
						,,,
	< Back Next >	Cancel		blishing Wizard Please select a d		Org chart documents, which provide end users with limited capabilities, are meant to be
	< Back Next >	Cancel Help		Please select a d	bourrent type Rubish a chart to a POF document. Create a Web page displaying a graphic of the chart. If the chart chudes introposite them an integer Map will be created	Org chart documents, which provide end users with imited
	< Back Next >	Cancel Help		Please select a d	bournert type Publish a chart to a POF document. Oneide a Web page declarging approfile of the chart. If the orbits include Traditional Hara in those May will be	Org chart documents, which provide end users with limited capabilities, are meant to be
	< Back Next >	Cancel		Please select a d	bournert type Publish a chart to a POF document. Create a Web page designing a prohibit of the chart. If a the chart include integration them an image May will be created. A more submoder this number under the	Org chart documents, which provide end users with limited capabilities, are meant to be
	< Back Next >	Cancel Help		Please select a d	bournert type Rubih a chart to a POF document. Onste a Web page displaying a graphic of the chart. If the chart includes intrapola them an image May will be created A more adjunced thin clert is available under the interactive Og Davisord stor. Onste a graphic file which can be alrown in a Web	Org chart documents, which provide end users with limited capabilities, are meant to be
	< Back Next >	Cancel Help		Please select a d	bournert type Rubih a chart to a POF document. Onste a Web page displaying a graphic of the chart. If the chart includes intrapola them an image May will be created A more adjunced thin clert is available under the interactive Og Davisord stor. Onste a graphic file which can be alrown in a Web	Org chart documents, which provide end users with limited capabilities, are meant to be
	< Back Next >	Cancel Help		Please select a d	bournert type Rubih a chart to a POF document. Onste a Web page displaying a graphic of the chart. If the chart includes intrapola them an image May will be created A more adjunced thin clert is available under the interactive Og Davisord stor. Onste a graphic file which can be alrown in a Web	Org chart documents, which provide and users with limited capabilities, are meant to be
	< Back Next >	Cancel Help		Please select a d	bournert type Rubih a chart to a POF document. Onste a Web page displaying a graphic of the chart. If the chart includes intrapola them an image May will be created A more adjunced thin clert is available under the interactive Og Davisord stor. Onste a graphic file which can be alrown in a Web	Org chart documents, which provide and users with limited capabilities, are meant to be

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.

Publish Location	×
Please select the file name and path for the published chart.	Charts can be published directly to the intranet webserver.
Publish to location:	It is a good idea to save charts published in HTML format into their own directory.
C:\Documents\My Charts\Pacific Eastern.htm	For realtime charts, a unique
Overwrite existing HTML and JS files Send to web server (FTP)	directory must be used. If a previously published realtime chart exists in the directory, its configuration data will be overwritten.

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.

Virtual Directory	X
Please specify the URL of the virtual directory on the web server. This is used by the web browser to locate the server for this chart. URL: (http://SiteName)	If you plan to publish an EChart, you must type the location of and have full access to a virtual directory. If you have questions on how to do this, see your IT administrator.
http://Servername/ECharts	
Set the maximum number of levels to concurrently display in the published chart. Setting a high number (greater than 3) especially for thin clients may result in long chart load times. Maximum chart levels: 2	The maximum level setting serves as a limit to prevent a user from degrading performance of the server by trying to chart an excessive amount of people.

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.

Security Options	×
ECharts provide several advanced security options. Select a chart security option Unsecured - All users can view the entire chart Active Directory® authentication System user ID/box linkage (not secure) Chart - User enters user ID and password Can be used with portals for single signon Password field: User ID Reverse proxy - User ID is supplied in HTTP header Variable USER_D Passed as a cookie	Securing your org chart protects sensitive information from being read by unauthorized individuals. You may control who can access the org chart, and what portion of the hierarchy each user can view. To restrict access at the custom field level, visit the Custom Field Edit Dialog via the menu item, Data/Custom Field Properties.
User ID field: User ID v Format of User ID field: User ID only v Starting box in chart Top of chart Supervisor's box User's box Box ID in this field: %. High Performers v Allow users to drill up from starting box	

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

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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.

Chart Style	×
Please select the Chart Style you want the chart to be published with. For the OrgPublisher PluginX, EChart, and Cross Browser options, this will be the opening style.	All styles in the chart will be included when published to OrgPublisher PluginX format. The styles can contain multiple views to expand the amount of information displayed and improve how it is
Org Chart with Photos	organized.
You may reset the starting box of this published chart. This will cause the published chart to start at the box that you have selected in the chart. If there is no box selected, the chart will start at the top box currently displayed.	In most cases, you will not need to reset the starting box. This is necessary when a publishing definition is assigned to start at a box ID that no longer exists in the chart.
Reset starting box	

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.

Notif	ication Email	X
✓ Enable Publish Notification Email Addresses:		You can enable OrgPublisher to generate a notification email should a data error prevent the publication
departmentemail@yourcompany.com	~	of your chart. For instance, if a hierarchy problem occurs, such as a box does not have a report to box, this email notifies you so that you can correct the error and republish. Enter the email address to which the notification should be sent, the email address from which the notification should sent, your mail server, and the port, if applicable. If you don't know the server and port information, contact your IT department.
From Address:		
youremail@yourcompany.com		
Mail Server:		
localhost		
Port		
25	Send Test Email	

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.

	Color Scheme	
Please select a color scheme for the publishe	ed chart	You can select a predefined color scheme or define a custom color scheme for the published chart. Keep in mind that certain color
ERP blue Use a custom color scheme Define custom color scheme. Preview	~	schemes may not be compatible with colors you have selected for your chart style. The colors scheme affects the title menu bars, as well as the bodres and column headings in the Style, Profile, List, Sarch, and Summan Views



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.

File Edit View Favorite	es Tools Help		
🛊 OrgPublisher 🚍 👘 📇 D	🗈 🤐 🥜 📩 Look for, Find names, titles, 🔻	🥗 Search 🥢 🚮 Show 2 chart level 🔻 👖 🍕 90%	T - ? Help
Contact Information Contra	actors Directory Open Positions Org Chart	Org Chart with Photos Org Chart with Profile Printing	Filter.Everyone 🕳
Sales ing Vice President san II Hester	Pacifi P R B B B B B B B B C C C C C C C C C C C	Please specify colors for the custom color scheme	× ×
han Resources	Finance		
Vice President	CFO		
Sam Patel	Edward P Rodriguez	OK	Cancel V
<			>
For Help, press F1	Levels shown: 2	Shown head count: 8	1



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. Y 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.

✓ Style selector ✓ Aain toolbar ✓ Save as ✓ Copy* ✓ Go to top* ✓ Search ✓ Toolbar search* ✓ Zoom to point* ✓ Zoom factor* ✓ Chain of Command ✓ Send To PDF*	Status bar Print Print Print preview* Settop of chart Display whole chart Display whole chart Display whole chart Display whole chart Display diavels Large About box button Reset Style Chart Layout*	toolbars to enable in the published chart. The items noted with an asterisk (*) are not applicable in EChart thin client charts. The Views toolbar provides the mos flexibility to end users. PluginX Cop affects right-click menus and Copy buttons in the Chart, List, and Search Views. If you disable the PluginX Copy option, the Copy button in the toolbar is, in effect, also disabled.		
✓iews toolbar ✓ Style view ✓ Tree view* ✓ List view/Search view	 Profile view Summary view 9 Box Matrix 			
Enable PluginX Copy* C Enable opening the search results in Microsoft Excel* *Not applicable for thin client				

Figure 20.

Toolbars and Buttons Defined

Published Chart T			Name Main Toolbar	Definition Displays buttons for standard window tasks, navigation, and options enabled by administrator.
📩 Look for: Find names, title	es. ▼ ♀ ∞ Search 盃 100%	V 👸 Show 2 chart level V	Navigation Toolbar	Helps you move through the chart and find information.
ê. I i i i ii i	V 🔋 Help		Layout, Views, and Help Toolbar	Select chart layout, views enabled by chart administrator, and open the help file.
Contact Information Contractors Directory	Open Positions Org Chart Org Chart with Photos	Org Chartwith Profile [() Filter: Everyone 🗸	Style Bar	Tabs switch to other available styles and groups.
Manager selected	Levels shown: 2	Shown head count: 8	Status Bar	Shows position type selected, number of displayed levels and shown head count.

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Org Modeling Toolbar	Name	Definition
🕂 🔆 OrgPublisher 🔜 🖃 🕌 har	Main Toolbar	Displays buttons associated with standard window tasks, as well as change report and email options.
A Look for. Find names, titles, V v Search 🛣 100% V 🎄 Show 2 chart level V	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.
Contact Information Contractors Directory Open Positione Org Chart Org Chart with Photos Org Chartwith Profile 🤇 🕩 Filter Everyone 🗸	Style Bar	Tabs switch to other available styles and groups.
Manager selected Levels shown: 2 Shown head count: 8	Status Bar	Shows position type selected, number of displayed levels and shown head count.

Succession Planning Toolbar	Name	Definition
🔆 OrgPublisher 🔜 🖃 🕌 🐇 🛍 🖛 🖳 🖳 🞑 📮	Main Toolbar	Displays buttons associated with standard window tasks, as well as change report and email options.
Look for. Find names, titles, 🔻 🗢 search 🚋 100% 💌 🎄 Show 2 chart level 🔻	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.
Contact Information Contractors Directory Open Positions Oig Chart Org Chart with Photos Org Chartwith Profile (+) Filter Everyone v	Style Bar	Tabs switch to other available styles and groups.
Manager selected Levels shown: 2 Shown head count: 8	Status Bar	Shows position type selected, number of displayed levels and shown head count.



OrgPublisher Publishing Organization Chart Publishing

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

Dublished at a set	Dutter News	
Published chart Main Toolbar Button	Button Name	Button Definition
	Сору	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.
<u>í</u>	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.
Look for: Find names, titles, (V	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.
[∞] Search	Open advanced search dialog	Opens the Search dialog at the Name tab.
æ	Zoom to point	Makes a selected box the center of the chart display.
100% 🔹	Zoom percent	Sets the zoom percent for the chart display.
an an	Set top of chart	Displays the selected box and reporting boxes in the center of the Chart View.
8 8 00	Display whole chart	Displays the chart from the highest box in the hierarchy.
star.	Drill up and Drill down	Enables the drill buttons in your chart which facilitate navigation between shown and hidden levels.



OrgPublisher Publishing Organization Chart Publishing

Published chart Main Toolbar Button	Button Name	Button Definition
Show 2 chart levels	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.
d ^o	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.
10 Martine Contraction	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. 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.
	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.
博	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	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.



OrgPublisher Publishing

Organization Chart Publishing

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.
<u>ē</u>	Print Preview	Displays the chart as it will look when you print it and is only available in the Chart View.
2	Print setup	Opens the system Print Setup dialog.
G	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.
Look for, Find names, titles, 🔻	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.
○®○ Search	Open advanced search dialog	Opens the Search dialog at the Name tab.
Search		Opens the Search dialog at the Name tab. Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes.
∞ Search	search dialog	Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding
<u></u>	search dialog Compact	Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes.
<u>100%</u> ▼	search dialog Compact Zoom percent	Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the
	search dialog Compact Zoom percent Display whole chart	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down
100% Show 2 chart levels	Search dialog Compact Zoom percent Display whole chart Levels Select the layout	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display.
100% ▼ \$20 Show 2 chart levels ▼ \$	Search dialog Compact Zoom percent Display whole chart Levels Select the layout style for this chart Insert a box containing an open	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display. Displays four options to change the chart layout. Inserts a normal box containing an open position
100% ▼ \$20 Show 2 chart levels ▼ \$	 search dialog Compact Zoom percent Display whole chart Levels Select the layout style for this chart Insert a box containing an open position Insert box 	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display. Displays four options to change the chart layout. Inserts a normal box containing an open position field. Inserts a normal box containing person and job
100% ▼ \$20 Show 2 chart levels ▼ \$	 search dialog Compact Zoom percent Display whole chart Levels Select the layout style for this chart Insert a box containing an open position Insert box containing a person 	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display. Displays four options to change the chart layout. Inserts a normal box containing an open position field. Inserts a normal box containing person and job fields into the chart.
100% ▼ \$20 Show 2 chart levels ▼ \$	search dialog Compact Zoom percent Display whole chart Levels Select the layout style for this chart Insert a box containing an open position Insert box containing a person Insert box	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display. Displays four options to change the chart layout. Inserts a normal box containing an open position field. Inserts a normal box containing person and job fields into the chart.
100% ▼ \$20 Show 2 chart levels ▼ \$	search dialog Compact Zoom percent Display whole chart Levels Select the layout style for this chart Insert a box containing an open position Insert box containing a person Insert box	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display. Displays four options to change the chart layout. Inserts a normal box containing an open position field. Inserts a normal box into the chart. Inserts a normal box into the chart.
100% 100% 5how 2 chart levels ★ ★ ★ ▲ ▲ ▲	search dialog Compact Zoom percent Display whole chart Levels Select the layout style for this chart Insert a box containing an open position Insert box containing a person Insert box Insert job	 Displays an easy-to-view, compact chart to facilitate dragging and dropping boxes by hiding everything except names in the chart boxes. Sets the zoom percent for the chart display. Displays the chart from the highest box in the hierarchy. Selects the number of levels from the drop-down list that you want to display. Displays four options to change the chart layout. Inserts a normal box containing an open position field. Inserts a normal box into the chart. Inserts a person field into a box in the chart. Inserts an open position field into a box in the chart.



OrgPublisher Publishing Organization Chart Publishing

Org Modeling Toolbar Button	Button Name	Button Definition
8. (9.) 8	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.
<u></u>	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.
Σ	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.
9	Print	Prints the chart. Prints a specific chart view if it is selected in Print Options or the Print Wizard dialog.
<u>A</u>	Print Preview	Displays the chart as it will look when you print it and is only available in the Chart View.
2	Print setup	Opens the system Print Setup dialog.



OrgPublisher Publishing Organization Chart Publishing

Succession Planning Toolbar Button	Button Name	Button Definition
5	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.
Look for, Find names, titles, 🔻	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.
○ ^{eo} 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.
100% 🔹	Zoom percent	Sets the zoom percent for the chart display.
0 9 9 8 00	Display whole chart	Displays the chart from the highest box in the hierarchy.
Show 2 chart levels -	Levels	Selects the number of levels from the drop-down
Show 2 chait levels		list that you want to display.
	Select the layout style for this chart	list that you want to display. Displays four options to change the chart layout.
	style for this chart Style View	list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays the styles available for the open chart.
	style for this chart	list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays
	style for this chart Style View	 list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays the styles available for the open chart. Opens and closes the Tree View, which displays the chart in an outline format. Click on a position
	style for this chart Style View Tree View	 list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays the styles available for the open chart. 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. 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
	style for this chart Style View Tree View List/Search View	 list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays the styles available for the open chart. 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. 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. Open and closes the Profile View, which displays information about an employee or position, including custom fields that are defined for that
	style for this chart Style View Tree View List/Search View Profile View	 list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays the styles available for the open chart. 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. 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. Open and closes the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type. 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. Opens and closes the 9 Box Matrix, which enables you to evaluate your organization's talent pool
	style for this chart Style View Tree View List/Search View Profile View Summary View	 list that you want to display. Displays four options to change the chart layout. Opens and closes the Styles View, which displays the styles available for the open chart. 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. 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. Open and closes the Profile View, which displays information about an employee or position, including custom fields that are defined for that position type. 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. Opens and closes the 9 Box Matrix, which enables

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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.

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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





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.

Planning charts can provide a history of revisions for each chart as well as the user ID and, if provided, a comment from the user.	Planning Options	
You can require that users password protect their planning charts. planning charts. Require that all planning charts be password protected you can select the type of change information you want to record by cicking Set default options for change report. You may show a visual indicator in the chart for boxes that have been added. Change report. Show visual indicator for changes Planning charts be password protected	user ID and, if provided, a comment from the user.	create a revision history, the login name and time of revision are recorded. In addition, comments, if
You may show a visual indicator in the chart for boxes that have been added, moved or edited.		planning chart adds a level of protection to your planning process. You can select the type of change
		clicking Set default options for
Set default options for change report	Show visual indicator for changes	
	Set default options for change report	
	< Back Next >	Cancel Help

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.

moved	y show a visual indicator in the chart for boxes that have be or edited.
	Show visual indicator for changes

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.

Change Report Options	×			
Generate Report Export Change Data				
 Create summary section Show position type summaries Show group summaries Show differences in summary fields Show differences for every manager 				
Show summary section for every manager Specify how you want to show people's names in the Box title - Name				
Where to view the report View report in web browser View report in Microsoft Excel				
OK Cancel				



• 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.

Spec	ify how you want to show people's names in	the
	Box title - Name	
	Box title - Name	<u>Š</u>
Wh	Job title - Name	-
6	Name (Box ID)	
e	Name (Person ID)	
0	Custom	
1		

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.

Custom Name Format	x
You may specify a custom format for showing people's names in the report. To specify a data field, put the field name between \$ charact For example, the format \$Box Title\$ - \$Name\$ (\$MyCustomField\$)" will result in a display of "Marketing - Jane Doe (Custom Field Data)" Below is a list of available data fields (double click to add	ers.
\$Box Title\$ \$Box ID\$ \$Job Title\$ \$First name\$ \$Middle name\$ \$Last name\$ \$Person Id\$ \$Org Unit ID\$ \$Business Unit\$ \$Business Unit\$ \$Business Unit\$ \$Business Unit\$ \$Business Unit\$ \$Busines Unit ID\$ \$Division\$	<
Custom name \$Box Title\$ - \$Name\$ Example of this format: Box Title - Jane Doe	
OK Cancel	

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.

Change Report Options	×
Generate Report Export Change Data	
The export option will generate a Microsoft Excel file that has for each type of change – added positions, removed positions, records and boxes that were moved. Specify which fields you want to display with each	
Parent Box ID	^
Box ID	
Person Id	
✓ Box Title	
Job Title	
✓ First name	
Middle name	
✓ Last name	
Org Unit	
Org Unit ID	
Business Unit	*
Select All Clear All	
ОК	Cancel

Figure 29.



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

Ele Edit y	iew Insert Format Icol	B Dita W	ugow Reib		Туре а	a question for	rheb -	8
	-) + 10 Arid		10 - B I U		I S %	1課1曲	- 3 - A	•
M30 ·	5		the same and same					
A	B	C	D E	F	Ģ	н	- 1º	-
Parent Box ID			Previous BPerson Id	Box Title	Job Title		e 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	
106	38	204	204			Sally	Johnsen	
9 23	38	106	3186		Sr Writer	Kirk	Spudder	
0 106	38	210	210			Donita	Veccione	
1				-				
12								
3				-				
4								
5								
16								
7								
8				-			-	
19								
80				1				
21								
2			anged Positions					



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.



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.

Planning Group Security	
Select a group that will be allowed to create/view/modify planning charts from a point at or under their own box in the chart.	When enabling planning in a secured EChart, you can select specific a group that can access the planning feature from their own point
Everyone v	in the hierarchy or for the entire chart.
Select a group that will be allowed to create planning charts for the entire chart hierarchy.	You can also choose to allow none of the groups access to the entire chart.
(None) v	
	1
< Back Next>	Cancel Help
S DOUR INDAL?	

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.

Finance	Finance Bus			
Accounting Coordinator Open Since: 03/11/2008 Open position	Email Contact Job Description Job Application Copy Copy hyperlink to person			
Finance <u>GL Accountant</u>				
<u>e</u>	Top of page (Book style printing)			

Figure 34.

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OrgPublisher Publishing Organization Chart Publishing

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

Board Back Street			

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 \checkmark 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 $^{\circ}$, 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.

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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.

Chart Options	×
If you selected a box in the chart that is not the top of the chart, you can choose to publish only the positions starting from that selected point in the chart. Exclude positions above In addition to the standard chart, you can publish an additional directory view that provides end users with quick access to phone numbers or other information. If you choose to publish a directory view one or more HTML files will be created. Create directory view for chart OrgPublisher can remember where each user was in the chart and open at that position when the user next opens the chart. Remember each user's navigation and interface changes Hotspots can use the current browser window or open a new browser window.	This dialog provides several choices for your published charts. Some options, such as remembering the end user's place in the chart or opening hotspots in the same browser are set as defaults which you change. The last field determines where end users will access a help file. The published chart contains a help button that opens a page in the Aquire web site. You can set a custom URL to open an end user help file that you create.
 Open hotspots in the same browser window Open hotspots in a new browser window If a hotspot link fails to find a box. OrgPublisher can either: Navigate to the top box in the chart Not display the chart If applicable, type a URL for a PluginX help file. 	
<back next=""></back>	Cancel Help

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.

Chart Options	×
If you selected a box in the chart that is not the top of the chart, you can choose to publish only the positions starting from that selected point in the chart. Exclude positions above In addition to the standard chart, you can publish an additional directory view that provides and users with quick access to phone numbers or other information. If you choose to publish a directory view one or more HTML files will be created. Create directory view for chart OrgPublisher can remember where each user was in the chart and open at that	This dialog provides several choices for your published charts. Some options, such as remembering the end user's place in the chart or opening hotspots in the same browser are set as defaults which you change. The last field determines where end users will access a help file. The published chart contains a help button that opens a page in the Aquire web site. You can set a
position when the user next opens the chart.	Aquire web site. You can set a custom URL to open an end user help file that you create.
Hotspots can use the current browser window or open a new browser window. Open hotspots in the same browser window If a hotspot link fails to find a box, OrgPublisher can either: Navigate to the top box in the chart Not display the chart If applicable, type a URL for a PluginX help file.	
<back next=""></back>	Cancel Help

Figure 39.

Remembered settings:

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.

Chart Options	×
If you selected a box in the chart that is not the top of the chart, you can choose to publish only the positions starting from that selected point in the chart. Exclude positions above In addition to the standard chart, you can publish an additional directory view that provides end users with quick access to phone numbers or other information. If you choose to publish a directory view one or more HTML files will be created. Create directory view for chart OrgPublisher can remember where each user was in the chart and open at that position when the user next opens the chart. Hotspots can use the current browser window or open a new browser window. Open hotspots in the same browser window If a hotspot link fails to find a box. OrgPublisher can either: Not display the chart If applicable, type a URL for a PluginX help file.	This dialog provides several choices for your published charts. Some options, such as reemebeing the end user's place in the chart or opening hotspots in the same browser are set as defaults which you change. The last field determines where end users will access a help file. The published chart contains a help button that opens a page in the Aquire web site. You can set a custom URL to open an end user help file that you create.
<back next=""></back>	Cancel Help

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.

Chart Options		
If you selected a box in the chart that is not the top of the chart, you can choose to publish only the positions starting from that selected point in the chart. Exclude positions above In addition to the standard chart, you can publish an additional directory view that provides end users with quick access to phone numbers or other information. If you choose to publish a directory view one or more HTML files will be created. Create directory view for chart	This dialog provides several choice for your published charts. Some options, such as remembering the end user's place in the chart or opening hotspots in the same browser are set as defaults which you change. The last field determines where en users will access a help file. The published chart contains a helo	
OrgPublisher can remember where each user was in the chart and open at that position when the user next opens the chart Remember each user's navigation and interface changes Hotspots can use the current browser window or open a new browser window.	published chart contains a neip button that opens a page in the Aquire web site. You can set a custom URL to open an end user help file that you create.	
Open hotspots in the same browser window Open hotspots in a new browser window If a hotspot link fails to find a box, OrgPublisher can either:		
If applicable, type a URL for a PluginX help file.	Cancel Help	

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.

Maximum number of email recipients in Search V	iow.	If you include email addresses in your chart, you can reset the defau maximum number of email recipients when using the Search View. A larger number may affect response time.
You may enable PlugnX accessibility support fo see the help file for details of this feature.	the visually impaired. Please	You can enable support for visually impaired end users for PluginX charts. This is also applicable to ECharts.

Figure 42.

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

Email	and Acce	ssibility		
Assimum number of email recipients in Search View 20 • You may enable PluginX accessibility support for th searce. • Enable Support for the visually impaired •	w		If you include email and your chair, you can ner maximum number of energy recipients when using 1 View. A larger number response time. You can enable support impaired and users for acts. The s allow ap 2Dants.	et the default nail he Search may affect t for visually PluginX
	< Back	Next>	Cancel	Help

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.

	Archive	
OrgPublisher can keep an archive of your chart a OrgPublisher will store copies of your chart as a This feature is extremely useful for tracking chan addition to creating easily viewable chart archive change reports that detail differences between 2	historical archive. ges in an organization. In ss, OrgPublisher can generate	Chart archive names are generated using the publishing definition name and the date. The weekly and monthly archive intervals are only achievable if you publish at least once per week or month respectively.
Keep an archive of this chart Specify the folder where the archives will be s	Chart archives do not support EChart security. If publishing a secure EChart, please avoid	
C:\Archives\Charts\	Browse	archiving to a public location.
Archives will be created on this interval: Every time the chart is published Weekly Monthly		
Note: This chart doesn't appear to contain po far more useful when they contain these data adding position IDs to field 17.		
	< Back Next >	Cancel Help

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 <u>Publish charts dialog</u> to publish or schedule the publish time for the chart.

rinsi		
You have finished setting up the publishing definition for this chart and are now ready to publish to your intranet.	Depending on the publishing format you select, you have several options. Hyou publish as Cross Browser Microsoft Silverlight	EChart Link Summary
Publish now Publish later	PluginX, Graphic, or HTML you can publish your chart immediately or at a foler time, schedule o time to publish, or publish and proview the chart. The preview lets you quickly evaluate the results and, if	Publishing completed successfully for Pacific Eastern EChart If chart was published previously, click the link to refresh the server. URL for rich clients
Schedule now	necessary, run the Publishing Witzerd again and make changes. ECharts can be published now or later Initial EChart publishing creates a BAT file. You republish an EChart by wraning the BAT file to	http://inelpub/www.col/ECharts/Pacific%20Eastern%20ECharthtm
	unload and reload data in order to reheah the chart. Automoting an EChart is done by scheduling the BAT tile in Microsoft Task Scheduler.	
<back finish<="" td=""><td>Cancel Help</td><td>OK</td></back>	Cancel Help	OK

Figure 45.

The **Schedule Now** option is not available for the EChart publishing format which requires some setup on the EChart server. See the <u>Scheduling ECharts</u> 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 k for kand publishing wizard, 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.





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

	Publishing Type	
Please select type o Interactive Org Chart	fpublishing you would like Publishes a chart that supports complex searching, drilling, and high quality printing This includes PluginX and EChart publishing	Select the type of chart you want it publish. A thin client chart can be published as an EChart and can be accessed through the interactive Org Chart publishing choice.
Org Chart Document	Publishes a document that has imited searching, doiling, and printing. This includes PDF and Graphic publishing	
	<back next=""></back>	Cancel Help

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.

Publish L	ocation	
Please select the file name and path for the published chart Publish to location. C:Documents/My Charts/Pacific Eastern Planning htm		Charts can be published directly to the intranet webserver. It is a good idea to save charts published in HTML format into their own directory. For realtime charts, a unique
	Browse	directory must be used. If a previously published realtime chart exists in the directory, its
Overwrite existing HTML and JS files		configuration data will be overwritter
		0.43

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 <u>OrgPublisher PluginX Implementation</u> guide for more details.



Default Style and Reset Starting Box

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

	Chan Style	
Please select the Chart Style you want the chart to OrgPublisher PluginX, EChart, and Cross Browse style. Chart Style:		All styles in the chart will be included when published to OrgPublisher Plugink Common. The styles can contain multiple views to expand the amount of information displayed and improve how it is
Org Chart with Photos	v	organized.
You may reset the starting box of this published c published chart to start at the box that you have so box selected, the chart will start at the top box cur	elected in the chart. If there is no	In most cases, you will not need to reset the starting box. This is necessary when a publishing definition is assigned to start at a box ID that no longer exists in the chart.
Reset starting box		
	<back next=""></back>	Cancel Help

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 identity who should be notified if there are data errors at publishing time.

 Enable Publish Notification Email 			You can enable OrgPublisher to
Lindua rouns rouncason cinas Addresses:			To can easily objection to the state area prevent the publication of your chart. For instance, if a hierarchy problem occurs, such as box does not have a report to box, this email notifies you so that you can correct the error and republish. Enter the email address to which the notification should be sent, the ema address from which the notification the port, if applicable. If you don't know the senser and point information contact your 10 department.
From Address:			
Mail Server			
Port			-
		Test Email	

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.

• Use the page optimizer	More pages Fewer p	ages Preferred layout
Use easy settings		- • 🔓 • 📩
OUse custom optimizer se	tings	Custom settings
Page customization	list	
Boxes across on book style pag	es	
O Automatically set row size	Specify maximum row size	
Organizational levels to print	Show all levels v	
Print Index	Show page number circles	
Include Legend		
Print Header	Print Footer	
Hyperlinks		

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.



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

Boxes across on book style pages		
O Automatically set row size	• Specify maximum row size	4



Organizational Levels to Print

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

Organizational levels to print	Show all levels	~
organizational levels to print	Show all levels	· ·



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

✓ Print Index	Show page number circles
✓ Include Legend	
✓ Print Header	✓ Print Footer
✓ Hyperlinks	



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.

Letter 8 1/		OA4 210 x 2		PDF publishing defaults to letter size, landscape orientation paper. You can override these settings to
O Legal 8 1	2 x 14 in	○A3297x4	20 mm	match your chart size and paper availability
Page Orientati	on			
 Landscap 	·· A	OPortrait	A	
Margins (in ten	ths of millimeters)			
Horizontal	60			
Vertical	60			





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

PDF Options Font Embedding Where possible, fonts used will be copied into the PDF file. Compatibility of the PDF file but results in a larger PDF file.	Embedding the fonts to print a PDF using as close a font style as your have in your chart can significantly increase the size of the file
Printer Resolution 600 DPI	Additionally, if your chart includes photos, you will have to consider enabling JPEG compression to help
Image Options These options apply to photos and background images Remove Duplicate Images Downsample high-resolution images JPEG Compression Low quality. High compression	limit the size of the file.
< Back Not>	Cancel Help

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.

	HTML Optic	ins		
Your HTML org chart may contain Hotspots and a down. ✔ Enable Dnil-up/Drill-down This option generates multiple HTML pages		p and drill-	The charts will contai each, unless specifie level. Using the JPE publishing with photo pictures clearer.	d at a different G format when
Use JPEG graphic format Recommended for displaying photos in the o	chart			
	< Back	Next>	Cancel	Help

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.





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.





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.

				Publish charts			
ublishin	ig Definitions	Schedules	Schedule Statu	s			
	Na	me	Start at	Style	How to Pub	lish	FTP to Webs
	Pacific East	ern9	Pacific Eastern	Contact Information	OrgPublisher PluginX	(ActiveX)	
	Pacific East	ern Planning	Pacific Eastern	Org Chart with Photos	OrgPublisher PluginX	(ActiveX)	
	Pacific East	ern General	Pacific Eastern	Org Chart with Photos	OrgPublisher PluginX	(ActiveX)	
	Pacific East	ern EChart	Pacific Eastern	Org Chart with Photos	EChart Rich Client		
	Pacific East	ern PDF	Pacific Eastern	Org Chart with Photos	Portable Document Fo	ormat (PDF)	
	Pacific East	ern HTML	Pacific Eastern	Org Chart with Photos	HTML with Drill-up/Dril	ll-down	
	Pacific East	ern Graphic	Pacific Eastern	Org Chart with Photos	Graphic for a web pag	e	
	Information 1	echnology	Information Tec	Org Chart with Photos	OrgPublisher PluginX	(ActiveX)	
Publis	lew sh where sers\janettes\[Update Documents\M	Delete	Eastern9.htm			> Browse
					Pu	blish	Publish All

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.

Publishir	ng Definitions	Schedules	Schedule Statu	9		
_						
	Na	me	Start at	Style	How to Publish	FTP to Webse
	Pacific East	em9	Pacific Eastern	Contact Information	OrgPublisher PluginX (ActiveX)	
	Pacific East	ern Planning	Pacific Eastern	Ore Chart with Photos	OraPublisher PluginX (ActiveX)	
•	Pacific East	ern General	Pacific Eastern	Org Chart with Photos	OrgPublisher PluginX (ActiveX)	
	Pacific East	ern EChart	Pacific Eastern	Org Chart with Photos	EChart Rich Client	
	Pacific East	ern PDF	Pacific Eastern	Org Chart with Photos	Portable Document Format (PDF)	
	Pacific East	m HTML	Pacific Eastern	Org Chart with Photos	HTML with Drill-up/Drill-down	
	Pacific East	ern Graphic	Pacific Eastern	Org Chart with Photos	Graphic for a web page	
	Information T	echnology	Information Tec	Org Chart with Photos	OrgPublisher PluginX (ActiveX)	



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.

<	>
New Update Delete	
C\Documents\My Charts\Pacific Eastern EChart.htm	Browse
C:\Documents\My Charts\Pacific Eastern EChart.htm Publish	

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.

Schedule Freque	ency 💌
Select Daily to run your task more than once a week	If you are uncertain how often to run the task, the least frequent schedule is monthly.
Select Weekly to run the task once a week, but more t once a month.	han You can change a schedule by selecting it from the Schedules tab and then clicking Update
Select Monthly to run the task once a month, but more than once a year.	
Select One time only if there is no need to run the task more than once.	9
Schedule your task:	
One time only Daily	
Weekly OMonthly	
< Back Next >	Cancel Help

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.

	User ID	×
Before your task can at name and password.	utomated, you must type a valid	The user name you type must be a member of the Administrator group for the machine on which the schedule is run.
Type user name: Type password: Confirm password:		
	L	
	<back next=""></back>	Cancel Help

Figure 69.

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Viewing, Editing, or Creating Publishing Schedules

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

Note: The <u>EChart publishing schedule</u> 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.

		n charts	
blishing Definitions Sched	tules Schedule Status		
Name	Publishing Definition	Schedule	Lastrun
Publish Orgchart	Pacific Eastern General	At 11:29 AM every Tue of ev	3/18/2014 11:29:00 AM
<			,
<	not be done from this dialog. Sch		

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.

		Publish charts		
Publishing Definitions	Schedules	Schedule Status		
Publishing Schedule		Status		
Pacific Eastern Ge	eneral	Successful operation		
<				,
٢				>
<				,
٢				>
<				> View log_
¢			Close	





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**.