



OrgPublisher Views

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Views

In addition to the normal *Chart View*, OrgPublisher provides several views that present analytical data within the chart.

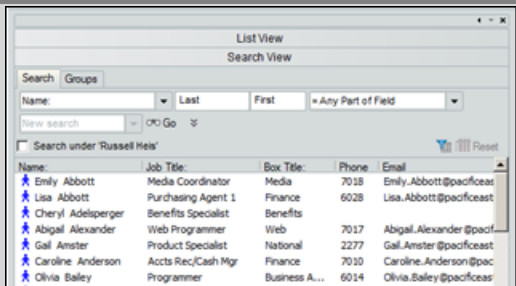
Views Toolbar

The views toolbar is visible to the chart administrator who can choose to show the toolbar or specific view buttons if the chart is published as PluginX or EChart rich client.

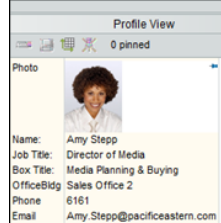


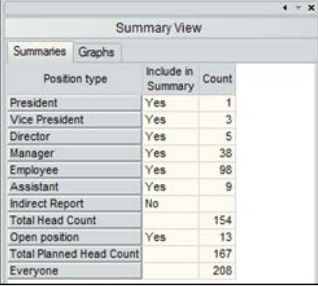
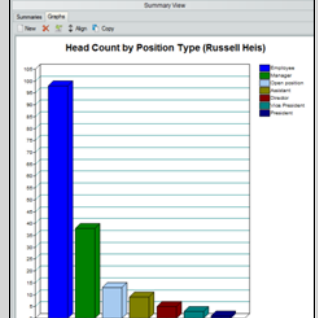
Figure 1.

View Name	Button	View
Wizard View is available only to the chart administrator		
Style View		
Tree View		
List View		

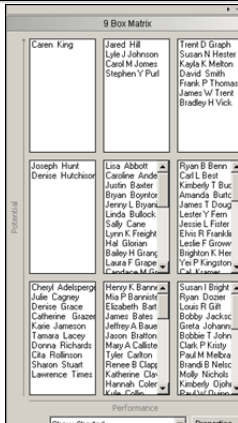
View Name	Button	View
List View also includes the Search View		

Profile View

View Name	Button	View
Summary View		
Summary View also includes a Graph View		

9 Box Matrix View in OrgPublisher Premier

Working with Views

All view options are available to display in the chart. As the chart administrator, you decide, style by style, what views appear when the user opens the chart and selects a style.

Views can be docked in one place or you can float them. You can also remove or resize views.

Docking Views

1. Place the mouse pointer on the grab bar area of the view window. Hold the left mouse button down and drag to a new location.

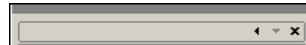


Figure 2.

2. An outline of the view appears as you drag to a new location at the top, bottom, left or right side of the chart. Release the mouse button to dock the view.

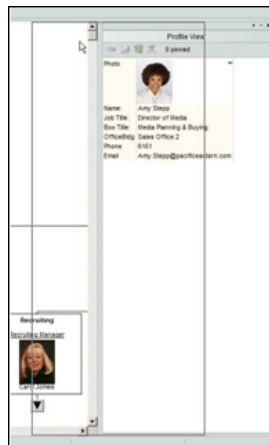


Figure 3.

Floating Views

1. Place the mouse pointer in the grab bar area of the view window. Hold the left mouse button down and drag to the chart area of the screen.

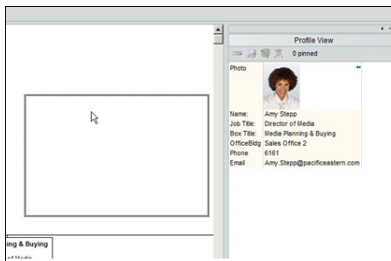


Figure 4.

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2. Release the mouse button when the view is in the desired location.

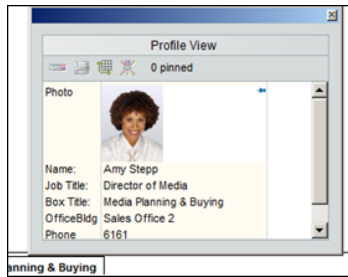


Figure 5.

Sizing a Docked View

1. Place the mouse pointer on the edge of the view window.

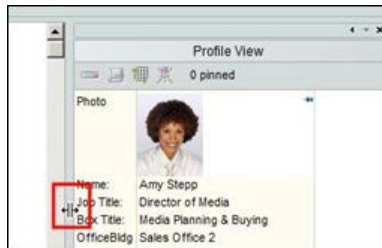


Figure 6.

2. If the view is docked on the left or right side of the chart window, drag to the left or right to increase or decrease the width of the window. If the view is docked on the top or bottom of the chart window, drag up or down to increase or decrease the window height.

Closing a View

Click the **X** button in the upper-right corner on the grab bar or click the toolbar button to close the view.

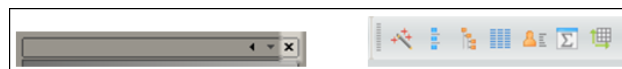


Figure 7.

Maximized Mode for Docked Views

You can also maximize docked views to fill the window, as long as the view is docked to the left or the right side of the chart window. This feature provides a method to create a dashboard style with hierarchical workforce analytics displayed for your management team. This feature is available in charts published as PluginX and EChart rich client.

When views are maximized, toolbar buttons that are not active with the view are “grayed-out.”

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In this following example, the *Profile View*, *Summary View*, and *Search View* are shown. The *Summary View* is maximized, but the *Profile View* and *Search View* are not. If not maximized, you can size a view by dragging the left or right edge.

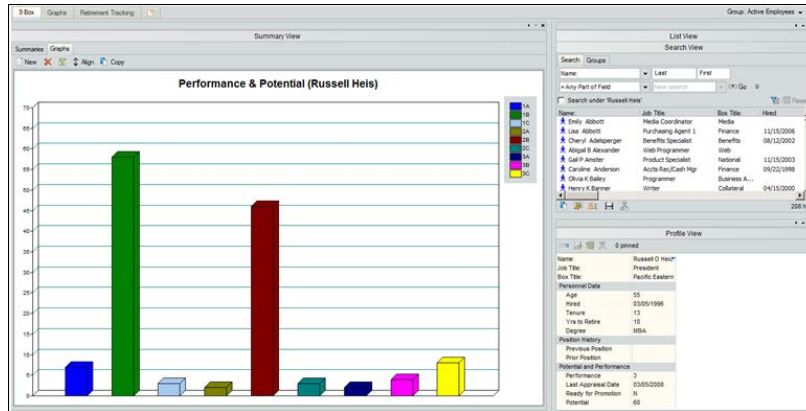


Figure 8.

Maximizing a View

1. Open the view and click the Maximize docked window button, highlighted below.

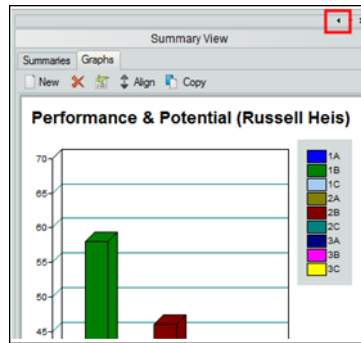


Figure 9.

The view maximizes to fill the window.

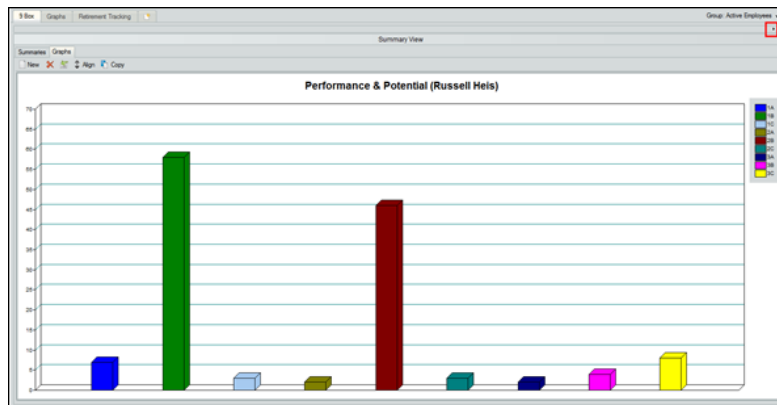



Figure 10.

- Click the Restore docked window button  to set the view to its previous size. You can also close the view and then reopen it to reset the size.

Opening More than One View

- Open all views you want to display in the chart. For instance, if you want to create a dashboard, first create a style and then open all the views you want to show.
- Dock the views and size as needed.
- Maximize your primary view.

Note: Only one docked view can be maximized at a time. If you maximize a second view, the first view reverts to its original size.

List View

The *List View* displays custom field data in spreadsheet style and can be customized for each style in the organizational chart.

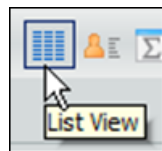


Figure 11.

The view contains two panes, the **List View** pane and the **Search View** pane. Fields display in the same order for both views within a style.

- The *List View* displays records of the employees currently shown in the *Chart View*, including all custom fields you want to appear in the view.
 - Select specific records or all records to copy to the clipboard
 - Show or hide selected columns individually or using bulk editor
 - Sort any column of data by clicking the column heading
- The *Search View* can show all records passed into the chart.
 - Search chart records
 - Save search results as a group
 - Send the search results to Microsoft Excel
 - Copy search results to clipboard
 - Send search results to side-by-side Profile View
 - Spotlight boxes with search results records in the chart
 - Sort any column of data by clicking the column heading
 - Send email to members of the saved group

List View Defaults

As chart administrator, you decide which pane is active for the user when the view is open.

Defaulting the List View Pane

- Select **Options** in the menu bar and select **List View options**.

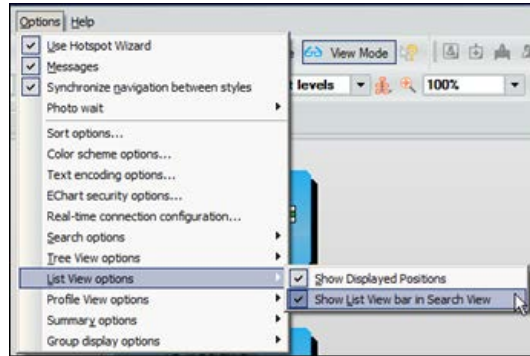


Figure 12.

If both options are checked, the *List View* opens by default and the **Search View** pane is minimized at the bottom of the view.

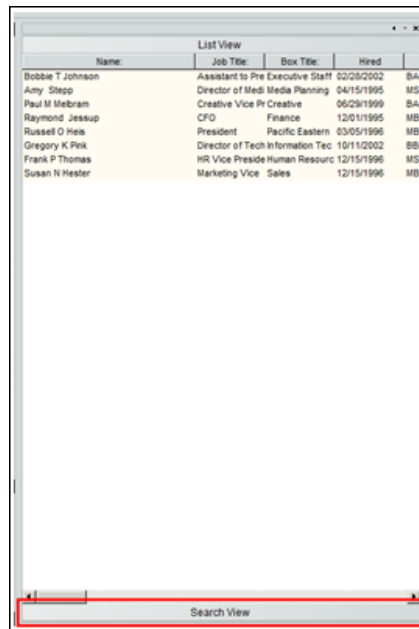


Figure 13.

Defaulting to the Search View Pane

- Select **Options** in the menu bar and select **List View options**.

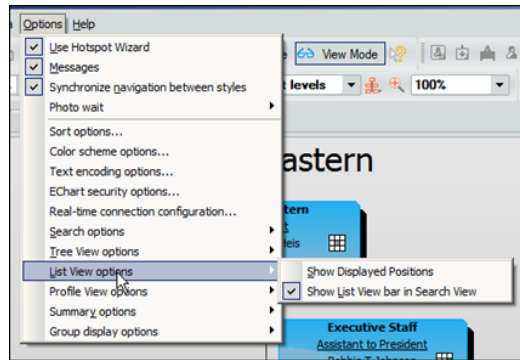


Figure 14.

If **Show Displayed Positions** is not checked, the *List View* is minimized at the top of the view and the **Search View** pane is shown.

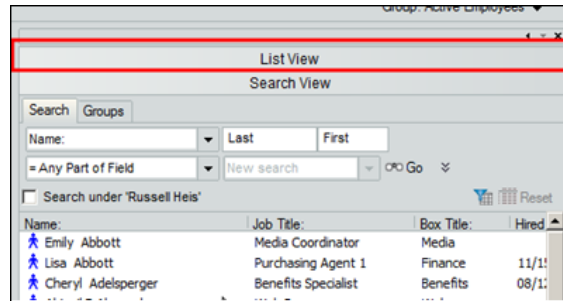


Figure 15.

Display the Search View and Hide the List View

- Select **Options** in the menu bar then select **List View options**.

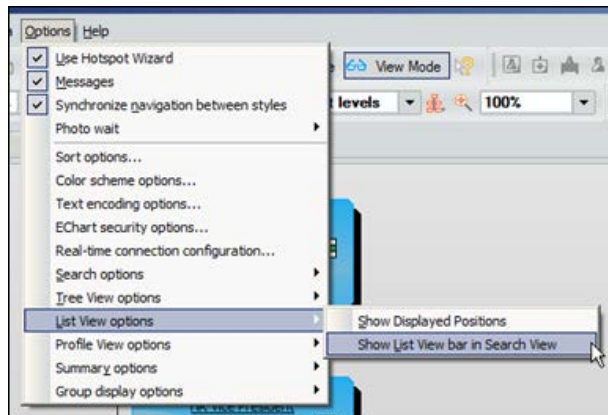


Figure 16.

If neither option is checked, the *Search View* opens and the *List View* is hidden, making it unavailable in the published chart.

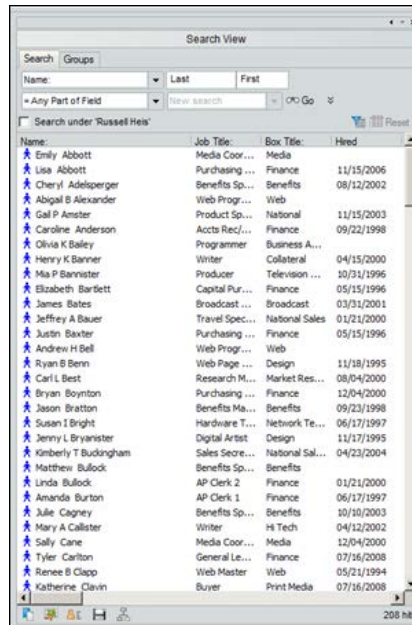


Figure 17.

Modifying the List View

Formatting changes affect the current open style. Each style can have a unique layout for the *List View*.

1. Verify that the *List View* displays in the chart.
2. Right-click on any column heading and select **Show/Hide columns**.

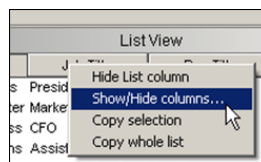


Figure 18.

3. In the *Show/Hide Fields* dialog, click to place a check mark to select a field for display or clear a checked field to hide the field. Click **OK**.

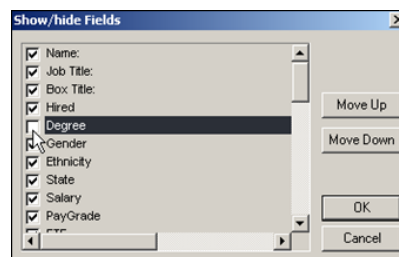


Figure 19.

4. To reorder fields displayed, select the field in the *Show/hide Fields* dialog and click **Move Up** or **Move Down**.

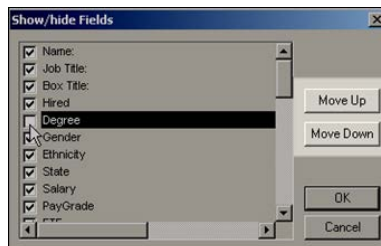


Figure 20.

Note: The *List View* layout is used to display the output when publishing a Directory version of the chart.


Search View Pane Functionality

The **Search View** pane provides many capabilities to analyze, navigate, filter, and extract data. A list of the functions and brief descriptions follow.



- The *Search View* enables end users to search chart information and create ad hoc groups
- The *Search View* is style specific and opens with the List View button in the toolbar, displaying the same columns shown in the *List View*
- The *Search View* displays everyone in the chart, group, or a selected section of the chart
- Buttons that provide additional functionality appear below the search results pane






Figure 21.

- Click  to send an email to everyone in the list or saved group

Note: The Email button is available only if a custom field designated as Email type exists in the chart.

- Click  to copy search results to the clipboard for pasting into Windows based applications
- Click  to send search results to Microsoft Excel

Note: The Excel button is available only if activated through the *Publishing Wizard*.

- Click  to save search results as a group
- Click  to spotlight boxes containing the saved search results criteria in the *Chart View*
- Click  to sand the search results as side-by-side profiles

Profile View

The profile view organizes the display of custom fields, photo, name, job title, and box title.

