OrgPlus Enterprise

OrgPlus Guide

Logging In

1) Go to https://orgplus.drexel.edu/orgplus/
2) Log in using your Drexel domain user ID and password
3) Select **Chart** to view organizational charts. Select **Directory** to search within the organizational charts.
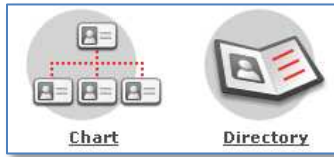
Icon Key

Icon	Name	Description
	Make Top	Creates a chart with the selected box at the top position. To select a box in the chart, click that box.
	Up one level	Creates a chart with the manager of the current top position in the topmost box.
	Chain of Command	Display supervisors (direct and indirect) for the current top position.
	Chain of Command Supervisor Levels	Select (to the right of the Chain of Command button) to control how many supervisor levels are shown when the chain of command option is enabled.
Levels: 2	Show Levels	Defines the number of levels to chart.
	Zoom In	Increases the magnification of your chart.
	Zoom Out	Decreases the magnification of your chart.
75%	Scale	Changes the magnification of the displayed chart.
	Fit to Window	Resizes the chart so that the entire content is visible in the current window.
	Zoom Wheel	When selected, the scroll wheel on the mouse controls magnification; otherwise, the scroll wheel controls vertical scrolling.
	Panning View	Shows a miniature version of your entire chart that can then be used to navigate to any area of a chart.
	Page Layout	Defines the page layout used to display the chart. Browser Page Setup should match the page layout settings when printing a chart.
	Print Preview	Displays a preview of how the current chart will look when printed.
	Print	Prints the current chart.
	Modeler	Exports organizational chart to the Modeler where you can edit/revise organizational charts for individual department use
	Excel	Exports data that is stored in the organizational charts into an Excel spreadsheet
	PDF	Publishes the organizational chart to a PDF document
	Powerpoint	Publishes the organizational chart to a PowerPoint presentation
	Expand/Collapse	Expands or collapses the Bookmarks, Explore, and Profile tabs

VIEWS

There are three different views in OrgPlus, accessible by the View drop down menu in the bottom center of the screen. Access to these views is reflective of an employee's access to Web*Salary.

Org Chart

This is the basic organizational chart. All Drexel and DUCOM employees have access to this view. It displays the following information for the entire University:

- Employee Name
- Position Title
- Department

Salary Org Chart

This chart displays basic salary information for Web*Salary users. Access to this chart is granted per org through Web*Salary access. It displays the following information for those who have access:

- Employee Name
- Position Title
- Annual Salary

Head Count/Span of Control

This chart displays basic salary information for Web*Salary users. Access to this chart is granted per org through Web*Salary access. It displays the following information for those who have access:

- Employee Name
- Position Title
- Headcount: The number of positions that roll up to an employee.
- Span of Control: The number of positions that report directly to an employee.
- Vacant Positions: The number of vacant positions that roll up to an employee.

VIEWING PROFILE/ EXPLORE/ BOOKMARK PANELS

Select the **Expand/Collapse** button underneath the **Sign Off** button at the top right of the screen.
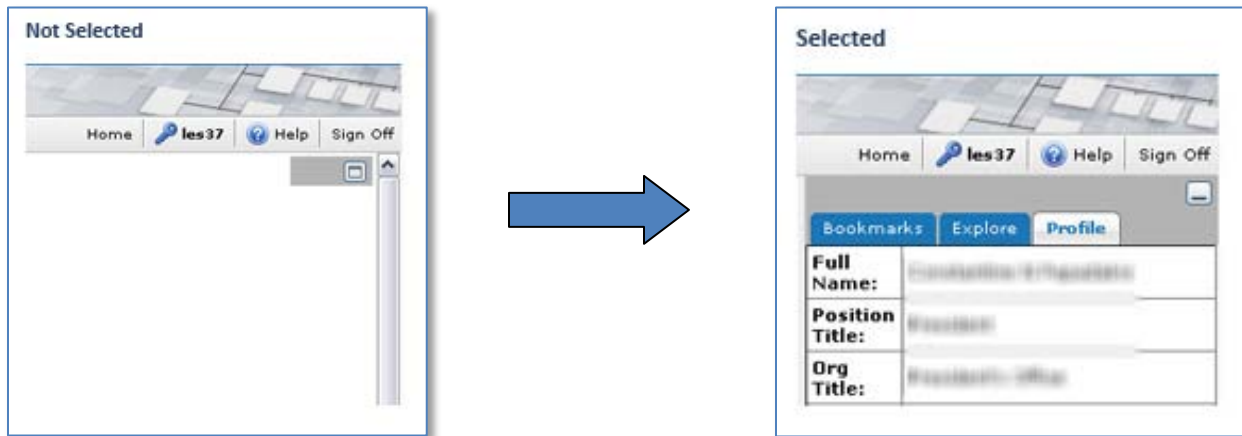
The **Profile** will display basic contact information for the employee that is selected in the organizational chart:

- Full Name
- Position Title
- Org Title
- Division Title
- Campus Address
- Campus Phone Number
- Email Address (displayed as an active hyperlink)

Creating Bookmarks

1) Select the **Bookmarks** tab.
2) Select the employee that you want to create a bookmark for in the organizational chart.
3) Select the **Add** button at the bottom of the Bookmarks tab.
4) Select **OK** in the **Bookmarks** tab.
5) Select the bookmark to be directed to the designated location in the organizational chart.

SEARCHING

You have two options when you want to search in OrgPlus: the **Directory** tab at the top of the screen, or the **Explore** panel to the right of the organizational chart.

Search from the Directory Tab

1) Select the **Directory** tab at the top of the screen.
2) Select the field you want to search from the drop down menu.
3) Enter your search criteria in the text field next to the drop down menu.
4) Select the **Search** button.

5) Your search results will display. Select an employee within the search results and their contact information will display in the **Profile** to the right of the screen. (To view the **Profile**, select the **Expand/Collapse** button underneath the **Sign Off** button.)

Search from the Explore Panel

1) Select the **Expand/Collapse** button underneath the **Sign Off** button at the top right of the screen.
2) Select the **Explore** tab.
3) Select the field you want to search from the drop down menu.
4) Enter your search criteria in the text field next to the drop down menu.
5) Select the **Search** button.

6) Your search results will display. Select an employee within the search results and you will be taken to their position in the organizational chart. Select the **Profile** tab to view their contact information.

EXPORTING ORG CHARTS

You have four options when exporting organizational charts:

| Export To		Description
	Modeler	Exports organizational chart to the Modeler where you can create, edit, and revise organizational charts for individual department use
	Excel	Exports data that is stored in the organizational charts into an Excel spreadsheet
	PDF	Publishes the organizational chart to a PDF document
	Powerpoint	Publishes the organizational chart to a PowerPoint presentation

Exporting to the Modeler

1. Select .
2. Specify a part of the chart to model:
   a. **Entire Chart**: Export the organizational chart for the entire University.
   b. **Displayed Chart**: Export the currently displayed chart.
   c. **Displayed Chart + Branch**: Export the currently displayed chart and all subordinates.
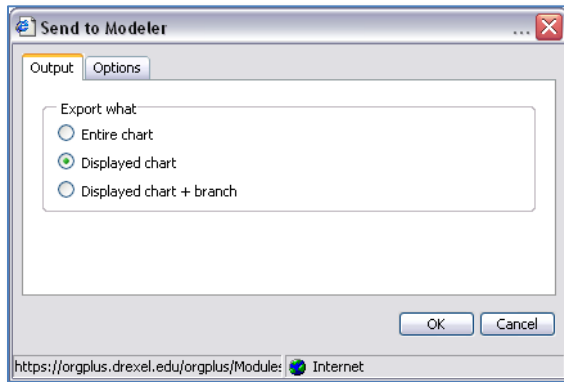
3. Select the **Options** tab to change one of more of the following settings:
   a. **Convert formulas to values**: If the chart contains formulas (such as headcount rollups) you may want to convert formulas to values in order to maintain numeric consistency between OrgPlus and the chart generated for your desktop. This is especially important if you create a file containing only the displayed chart.
   b. **Exclude Unused Fields**: Excluding unused fields insures that fields that are not included in the current chart, index, and profile are not included as part of the file you are exporting. This reduces file size and stops accidental distribution of restricted data.
   c. **Sub-chart every <n> levels**: Insert sub-chart breaks after a specific number of levels.
   d. **Include sub-chart labels**: Display sub-chart name and/or number labels when creating the exported chart.

e. **Include Orphans records**: Include records that are not included in the hierarchy. Orphans may exist due to a lack of supervisor information for an employee.
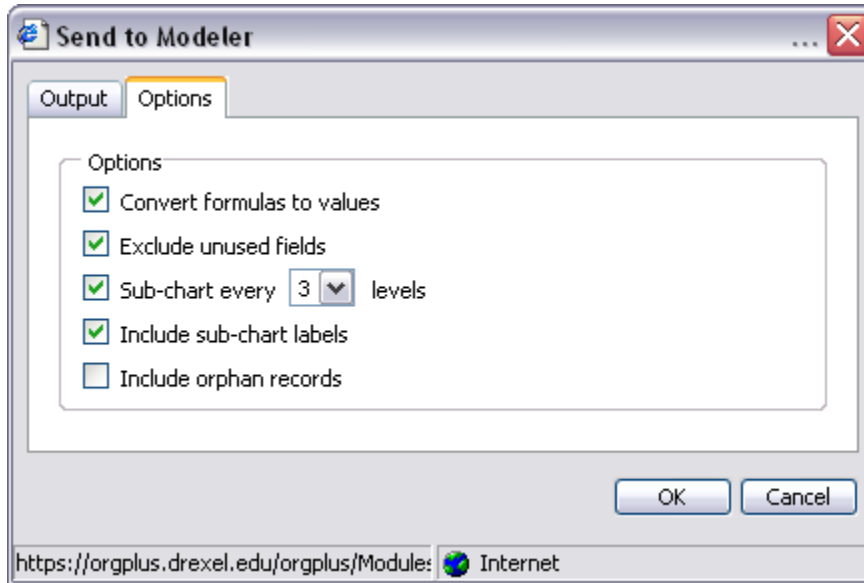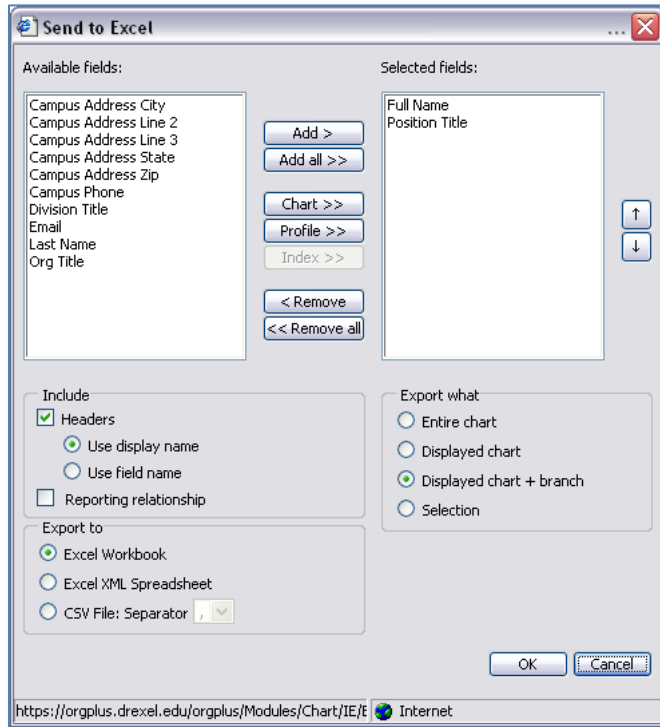

4. Select **OK**.

Note: The first time you use the Send to Modeler functionality you will be prompted to install an ActiveX component.

Exporting to Excel

1. Select [icon].
2. Use the **Add**, **Add All**, **Remove** and **Remove All** buttons to select the fields to export, or use the **Chart** or **Profile** buttons to export a specific group of fields (you can reorder the field using the [icon] and [icon] buttons):
    a. **Chart >>**: Export all fields included in the current chart.
    b. **Profile >>**: Export all fields included in the current profile.
3. Specify additional information to include in the export file:
    a. **Headers**: Specify whether to include field names in the first row of the export file.
    b. **Reporting Relationship**: Specify whether to include position and "reports to" fields in each row of the export file. Including the position and "reports to" fields preserves hierarchy information.
4. Select what part of the chart to export:
    a. **Entire Chart**: Export the organizational chart for the entire University.
    b. **Displayed Chart**: Export only the currently displayed organizational chart.
    c. **Displayed Chart + Branch**: Export the currently displayed chart and all subordinate boxes.
    d. **Selection**: Export only the selected box.
5. Select the export format:
    a. **Excel Workbook**: Format export file for viewing in Excel 2000 or later.
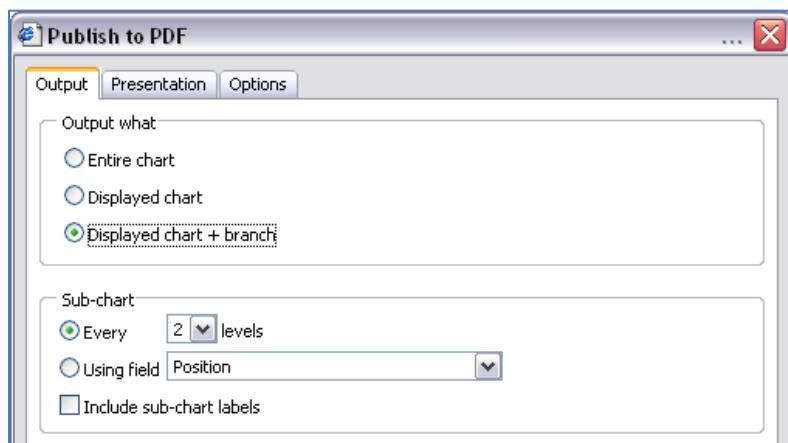   b. **Excel XML Spreadsheet**: Format export file for viewing in Excel 2003 or later.

c. **CSV (Comma Separated Values) File**: Create a flat file delimited by the value specified in the associated drop-down list.
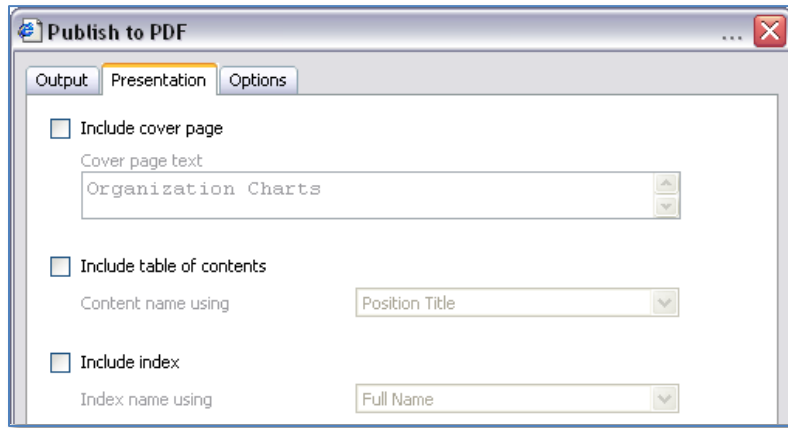

6. Select **OK**.
7. Select **Save** to specify a file name.
8. Use **Excel** to view the exported file.

Exporting to PDF

1. Select .
2. Specify a part of the chart to publish:
   a. **Entire Chart**: Exports the organizational chart for the entire University.
   b. **Displayed Chart**: Exports only the currently displayed organizational chart.
   c. **Displayed Chart + Branch**: Exports the currently displayed chart and all subordinate boxes.
3. Sub-chart: If you are creating a multiple page book, you may want to break your chart into sub-charts.
   a. **Every <n> levels**: Inserts sub-chart breaks after a specific number of levels.
   b. **Using field**: Inserts sub-chart breaks based on a field (such as department).
4. Use the **Include sub-chart labels** checkbox to attach a label to each sub-chart break.

5. Select the **Presentation** tab to include a Cover page, table of contents, and/or an index.

6. Select the **Options** tab to set the following parameters:
   a. **Paper Size**: A0, A1, A2, A3, A4, Legal, Letter.
      Note: PDF publishing is useful for outputting charts to large format printers and plotters. Make sure you pick the paper size that is most appropriate for your output device.
   b. **Include Navigation Arrows**: Includes hyper-linked navigation arrows in the PDF file.
   c. **Image Compression**: Compresses images and text in the PDF file.
   d. **GrayScale**: Creates a grayscale PDF file rather than color.
   e. **Maximize chart area**: Maximizes the chart area in the published output.
   f. **Orientation**: Defines the orientation of each slide/page (Portrait or Landscape).
   g. Box size:
      i. **Automatic**: Sizes boxes automatically according to available space on each page.
      ii. **Same across all sub-charts**: Because this option sizes boxes according to the page with the least amount of space, some boxes may be hard to read.
   h. Font Embedding: Specify the way you want fonts embedded in the published document.
      i. **Descriptor only**: Only stores font names in the PDF file. If a user does not have the specified font installed, a substitute font is used. This creates smaller PDF files.
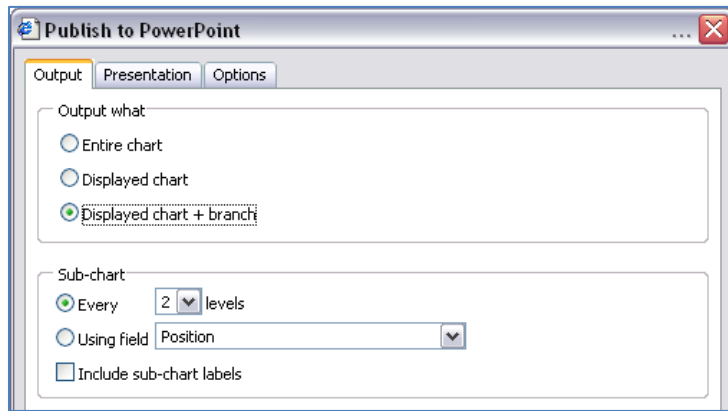   ii. **Outlines:** Includes complete font descriptions in the PDF file. This ensures that the chart displays with your original font selections. This creates larger PDF files.
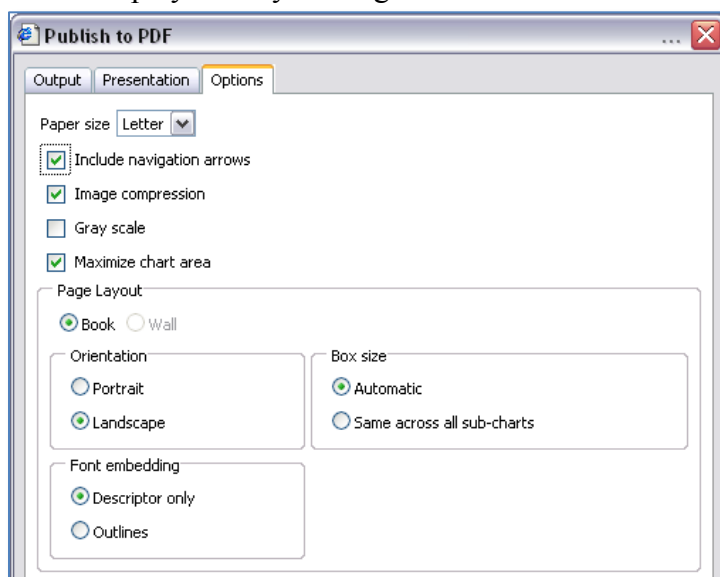

7. Select **OK** to publish the chart.

Exporting to PowerPoint

1. Select ![icon].
2. Specify a part of the chart to publish:
   a. **Entire Chart**: Exports the organizational chart for the entire University.
   b. **Displayed Chart**: Exports only the currently displayed organizational chart.
   c. **Displayed Chart + Branch**: Exports the currently displayed chart and all subordinate boxes.
3. Sub-chart: If you are creating a multiple page book, you may want to break your chart into sub-charts.
   a. **Every <n> levels**: Inserts sub-chart breaks after a specific number of levels.
   b. **Using field**: Inserts sub-chart breaks based on a field (such as department).
4. Use the **Include sub-chart labels** checkbox to attach a label to each sub-chart break.

5. Select the **Presentation** tab if you want to include a Cover page, table of contents, and/or an index.
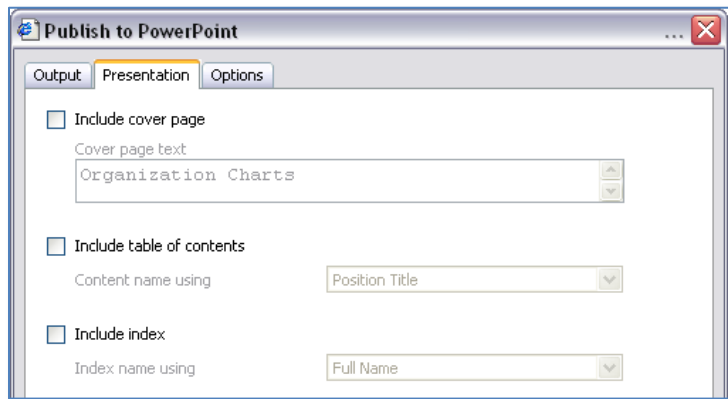
6. Select the **Options** tab to set the following parameters:
   a. **Paper Size**: Select A4, Letter or Legal.
   b. **PowerPoint Template**: You can upload a PowerPoint template (.pot) to apply to each page when the PowerPoint document is generated.
   c. **Maximize Chart Area**: Scales the chart to fill the destination page.
   d. **Orientation**: Defines the orientation of each slide/page (Portrait or Landscape).
   e. Box size:
      i. **Automatic**: Sizes boxes automatically according to available space on each page.

ii. **Same across all sub-charts**: Because this option sizes boxes according to the page with the least amount of space, some boxes may be hard to read.
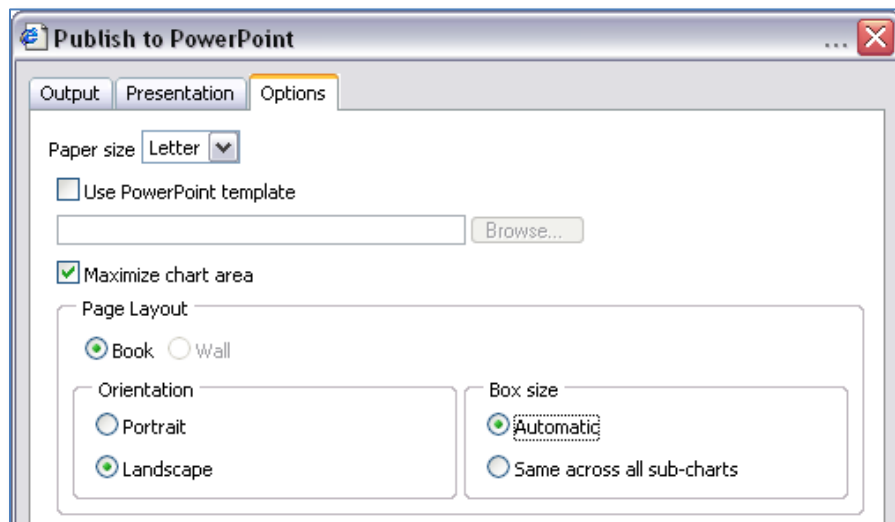
7. Select **OK** to publish the chart.

WORKING WITH THE MODELER

1) Export the chart to the Modeler. (See page 6.)

2) Select the box or chart you would like to edit.

3) Using the editing toolbar to edit the look and feel of the chart (located at the bottom of the screen)

Edit	Tool	Icon
Appearance of Chart Boxes	Box Shape	
	Box Fill Color	
	Box Border	
	Box Dashed	
	Box Border Color	
	Box Shadow	
How Boxes are Arranged in the Chart	Chart Styles	
Text in the Chart Boxes	Text Toolbar	Calibri B I U ≡ ≡ ≡ A ▾ ☐ ▾ A ▾
Add Boxes to Organizational Chart	Insert Toolbar	

4) Using the Box Properties window to edit the look and feel of the chart

   a. Select Format > Box Properties from the toolbar

      i. Color and Lines tab: Change the look of the boxes and lines within the chart. You can change the box shape, fill color, box border color, and box border line style.

      ii. Shadow tab: Change the look of the shadow on the boxes within the chart. You can change the shadow style, direction, color, and dimensions.

iii. Box Layout tab: Change the layout of the boxes within the chart. You can change which fields are displayed in the box, where fields are displayed, and how the text is displayed.

1. To add data fields to the box layout, select the field in the left-hand column and drag it into the box layout.

2. To remove data fields from the box layout, select the field in the box layout and drag it to the left-hand column.

3. To change the order of the fields within the box, select the data field and drag it to the new position. You can also place data fields on the four corners surrounding the box.

4. To change how the text is displayed within the box layout, double click on the data field. A text editing window will pop up. Make your changes and then select OK.

5. After you are finished making your changes, select OK to close the Box Layout window and apply the changes.

5) When finished editing, select **File** > **Save As**.

a. Navigate to the folder where you want to save the organizational chart.

b. Enter a name for the file in the **File Name** field.

c. In the **Save as Type** field, select from the drop down menu what you would like to save the chart as:

i. **OrgPlus 7 File**: saves only the organizational chart that you just created.

ii. **OrgPlus 7 Template**: allows you to create new organizational charts using the look you created.

d. Select **Save**.

6) To reopen the file after saving it, navigate to the file saved on your computer and double click on it. The Modeler will automatically open with the file.