



User Manual

Version 4.3.0

Contents

1	Introduction	3
1.1	Web Part structure.....	3
1.2	Toolbar	4
1.3	People Cards.....	4
2	Configuring 1OrgChart.....	5
2.1	Add the web part to the page.....	5
2.1.1	Search.....	8
2.1.2	Toolbar Options.....	9
2.1.3	Name Links	10
2.1.4	Display Properties (Styling 1OrgChart)	13
2.1.5	Warning Messages.....	15
2.1.6	Enable/Disable Printing Options.....	18
3	Using 1OrgChart.....	20
3.1	View My Site	20
3.2	Online Presence	20
3.3	Manage People	22
3.3.1	Hide Selected Users	22
3.3.2	Hide users only when the following is true.....	23
3.4	Apply a Colour Code.....	24
3.5	Save.....	29
3.6	Print.....	30
3.7	Views.....	32
3.7.1	Create View	32
3.7.2	User Information List	34
3.7.3	Custom SharePoint List.....	38
3.7.4	Modify a View.....	39
3.7.5	Delete a View.....	40
3.7.6	Export to Microsoft Visio.....	40
3.7.7	Backup.....	46
3.7.8	Restore	47
3.8	Direct Person View.....	48
3.8.1	Modify Direct Person View for Profile	49
3.8.2	Modify Direct Person View for Lists.....	50
3.9	People Explorer View	51
3.9.1	Display the people explorer pane.....	51
3.9.2	Display the people explorer from this person.....	52
3.9.3	Do not display the People Explorer pane.....	53
3.10	Search Results.....	55

1 Introduction

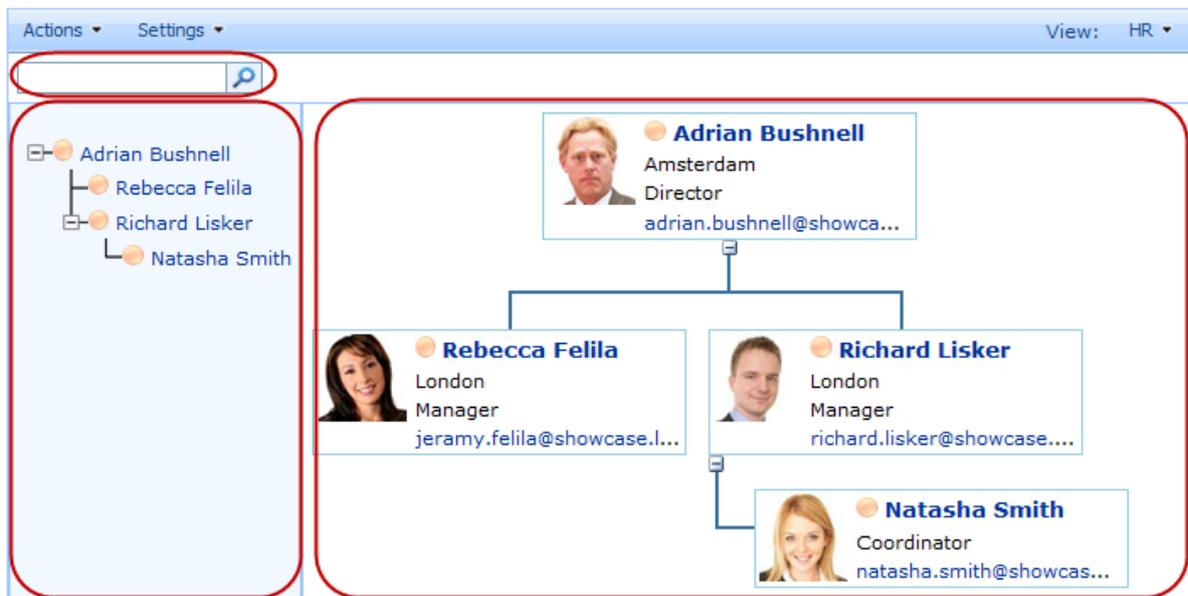
1OrgChart web part for SharePoint 2007 allows you to create organisational and departmental charts with information pulled from SharePoint's User Profiles or a customised SharePoint list.

This user manual is intended for SharePoint users configuring the 1OrgChart web part on their Microsoft Office SharePoint Server 2007 or Windows SharePoint Server 3.0 bases sites.

1.1 Web Part structure

The 1OrgChart web part contains three areas

1. Search Box
2. People Explorer
3. Chart View



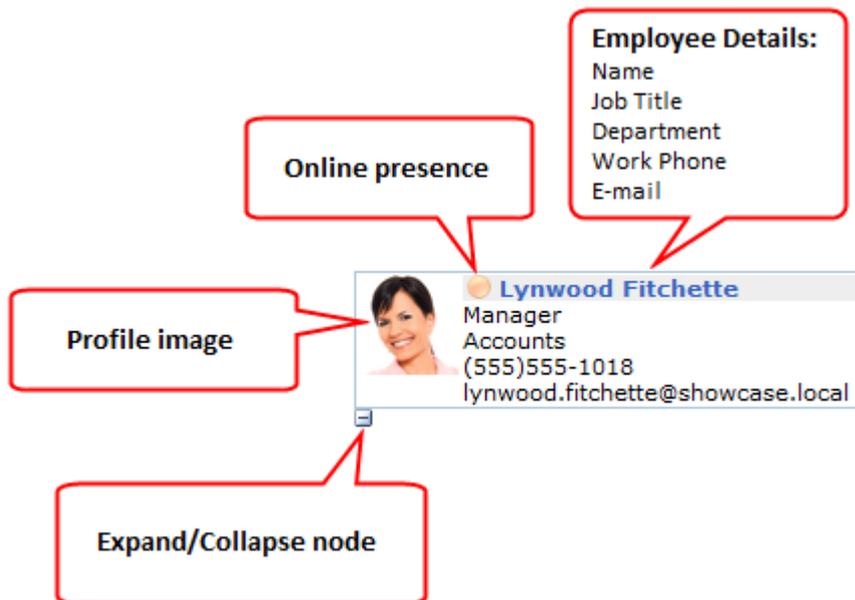
1.2 Toolbar

1OrgChart has three drop down menus available:

- Actions
 1. **Print** – Section **3.6**
 2. **Save** - Section **3.5**
- Settings
 1. Manager People - Section **3.3**
 2. Backup - Section **3.7.7**
 3. Restore - Section **3.7.8**
 4. Modify Direct Person View for Profile - Section **3.8.1**
 5. Modify Direct Person View for List - Section **3.8.2**
- Views
 1. **Create View** - Section **3.7.1**
 2. **Modify View** - Section **3.7.4**

1.3 People Cards

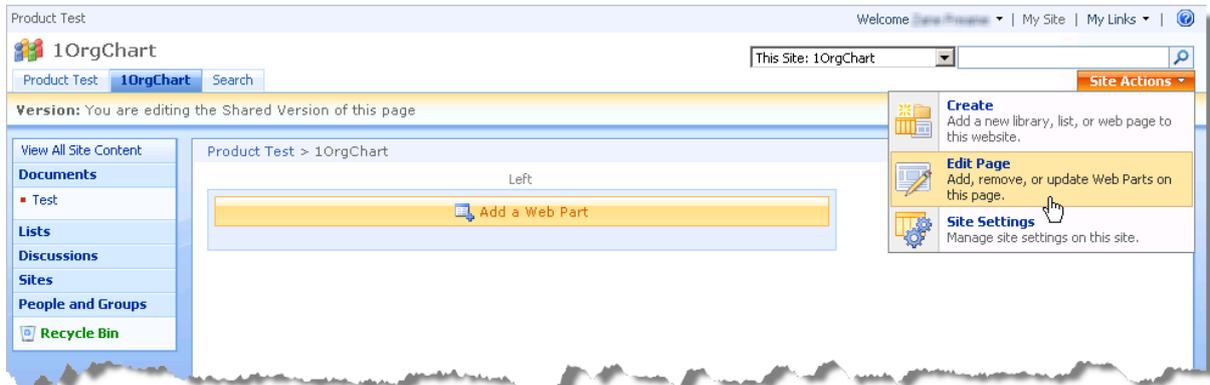
Each account within your profile store or list will have a corresponding People Card. Each card consists of a number of option elements which are identified below.



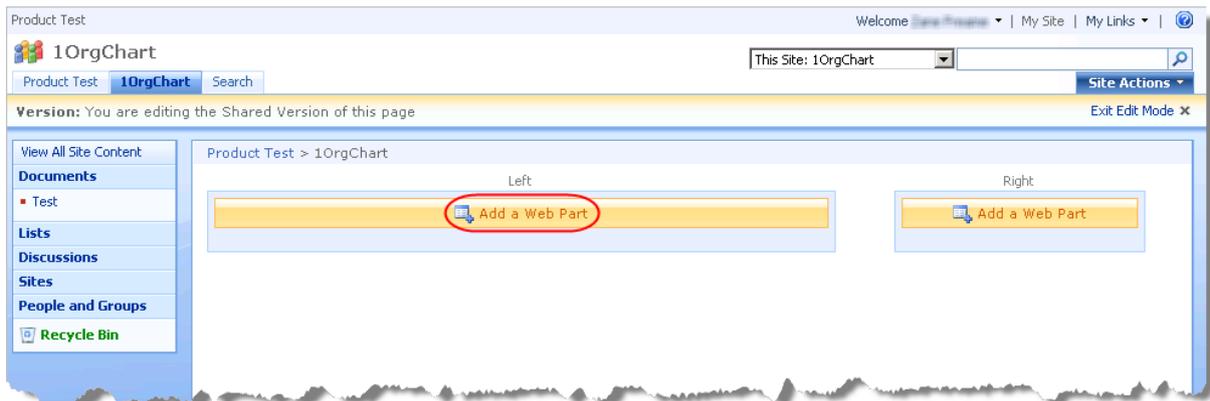
2 Configuring 1OrgChart

2.1 Add the web part to the page

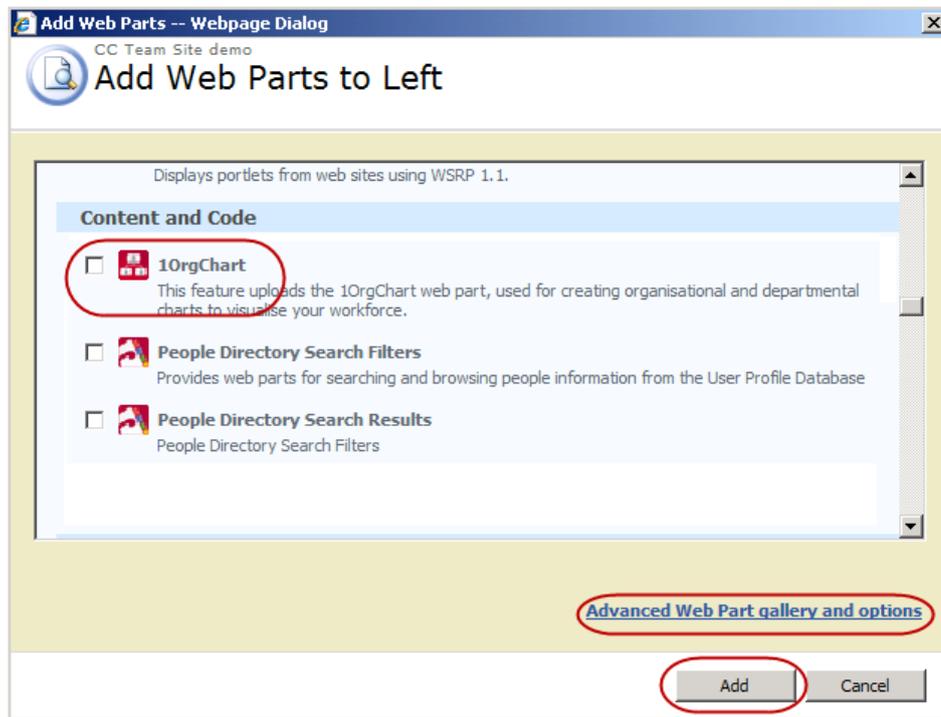
- Browse to the site where you have installed 1OrgChart.
- From the **Site Actions** menu, click **Edit Page**



- On a web part zone, click **Add a Web Part**

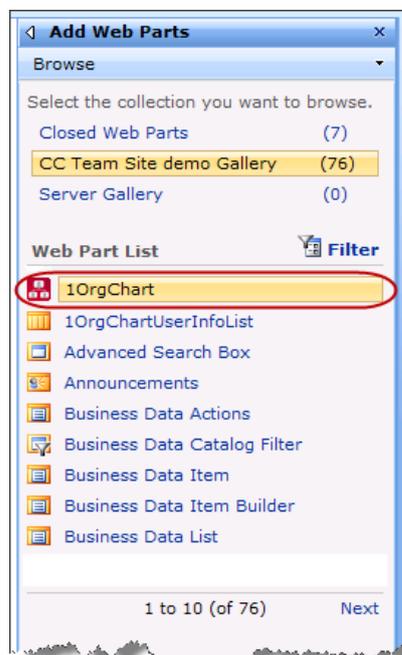


- In the **Content and Code** group, tick **1OrgChart**
- Click **Add**

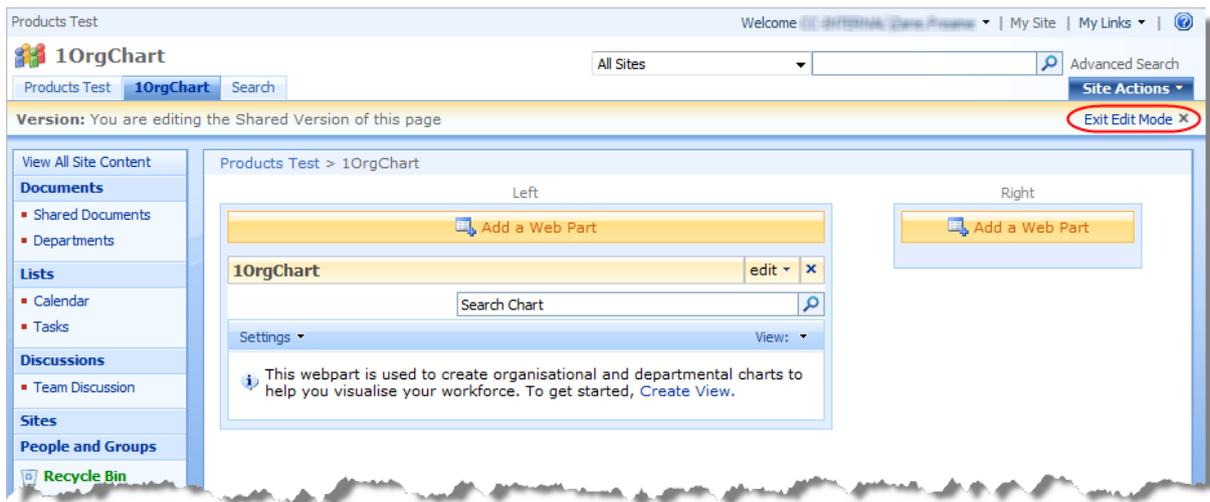


Note: Alternatively, you can and drag and drop the web part into the zone by

1. clicking on **Advanced Web Part Gallery and Options**
2. Once the **Advanced Web Part gallery and options** screen appears, select **1OrgChart** and drag it to the desired zone.



- Click **Exit Edit Mode**.

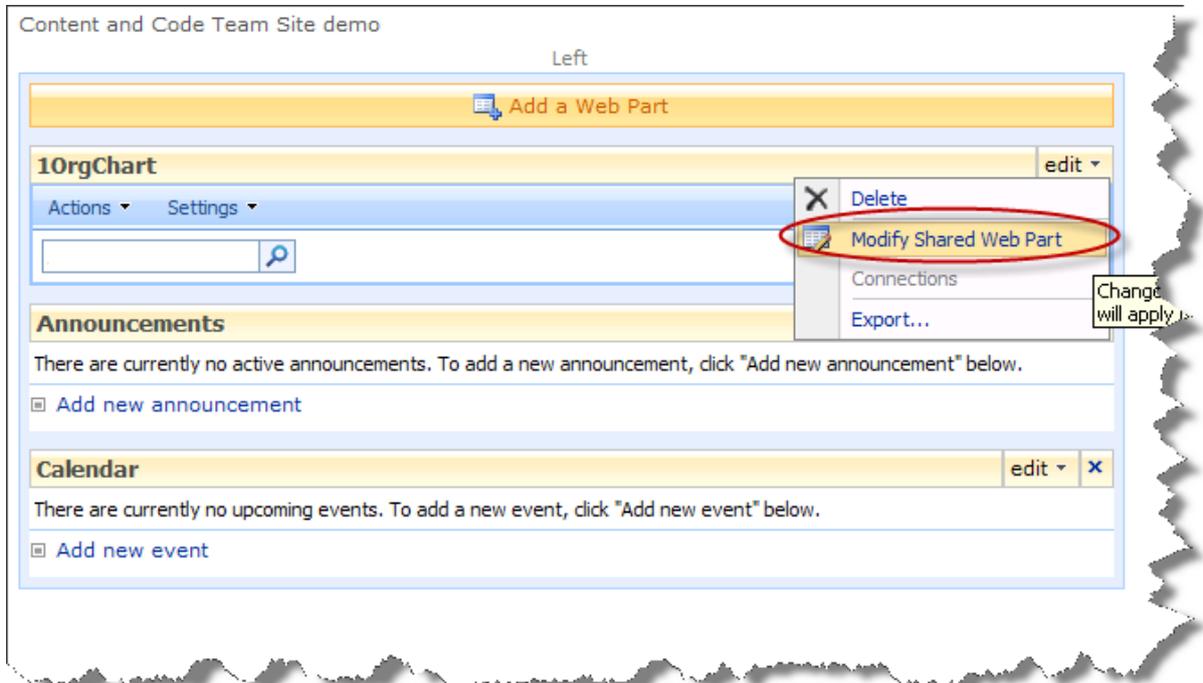


The 1OrgChart web part has now been successfully added to the page. You can now create one or more views of people within your organisation.

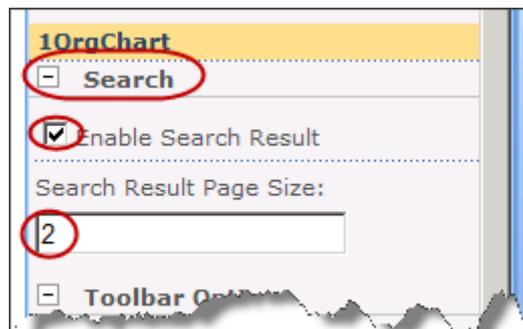
2.1.1 Search

If you would like to enable/disable the search feature as well as customising the amount of results per page, follow these steps.

1. Click **Modify Shared Web Part**



2. In the **Search** option, select and deselect **Enable Search Result** to enable and disable the search functionality within 10OrgChart.

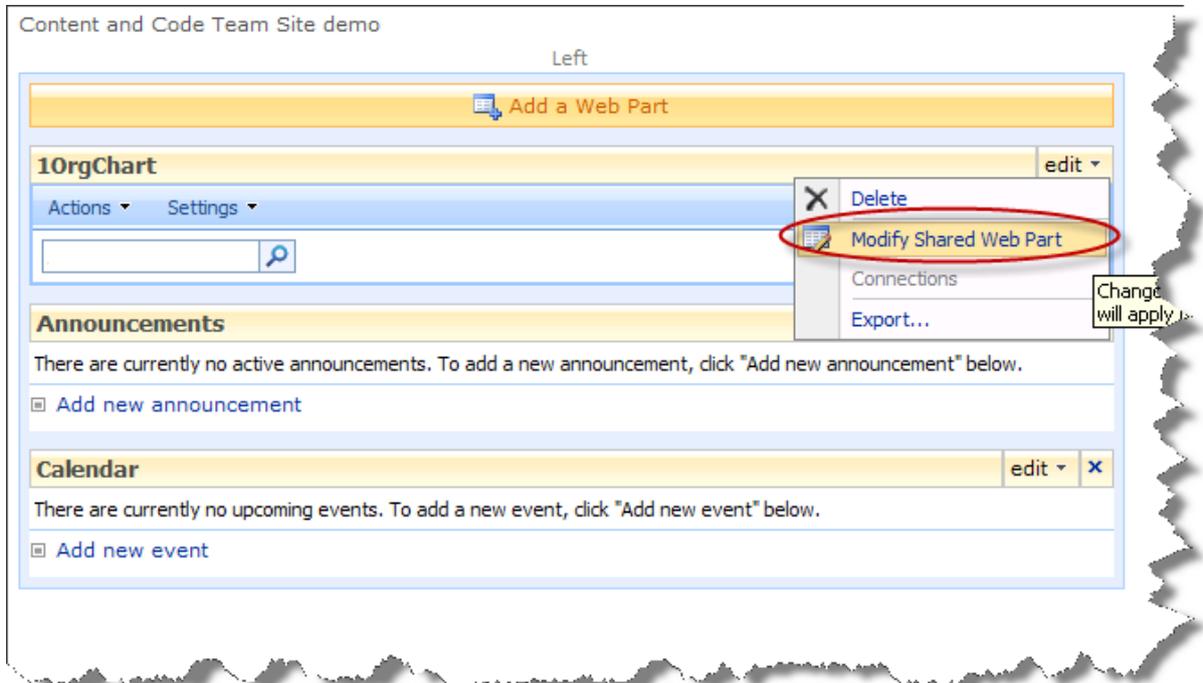


3. In the **Search Result Page Size**, enter the desired amount of results to appear per page.

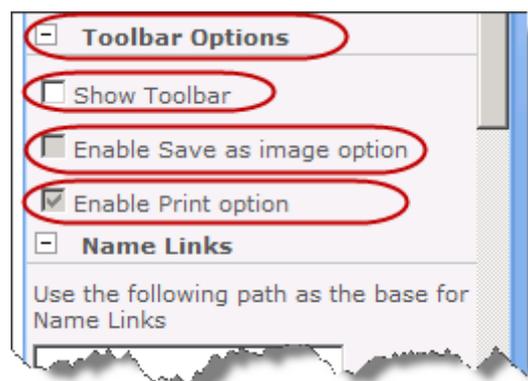
2.1.2 Toolbar Options

To enable and disable the use of the 1OrgChart **Toolbar**, **Save as Image** and **Print** functionality follow these steps.

1. Click **Modify Shared Web Part**



2. In the **ToolBar Options** section, select **Show Toolbar** to enable the use of the toolbar within 1OrgChart, or deselect **Show Toolbar** to disable the use of the toolbar within 1OrgChart.
3. To enable and disable **Save as Image** option, select and deselect the **Enable Save as image option**
4. To enable and disable **Print Option**, select and deselect **Enable Print Option**.

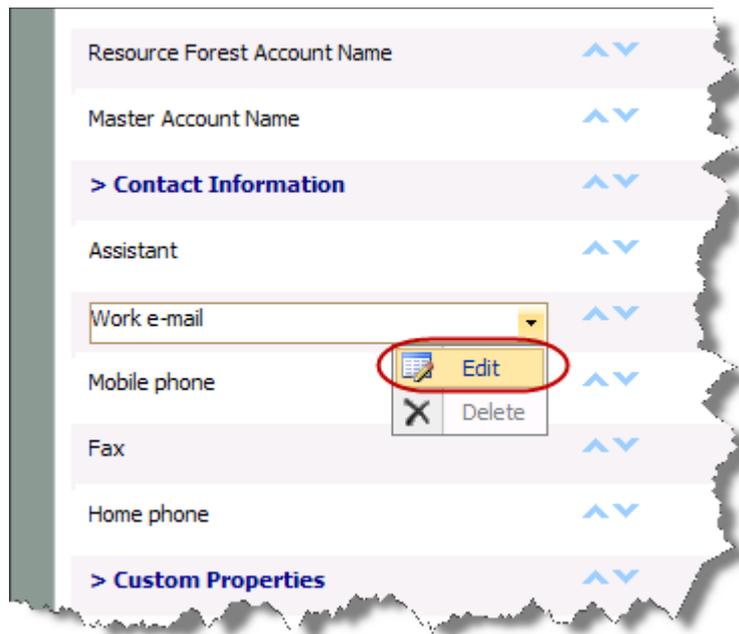


2.1.3 Name Links

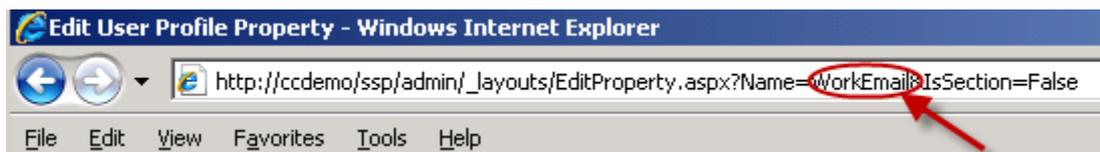
The following instructions will guide you through the steps to attach links to specified fields within 1OrgChart.

To find the correct text information to enter as a name link, follow these steps.

1. Open **Shared Services** within **Central Administration**
2. Select **User Profile and Properties > View Profile Properties**
3. Select a property and select **Edit**

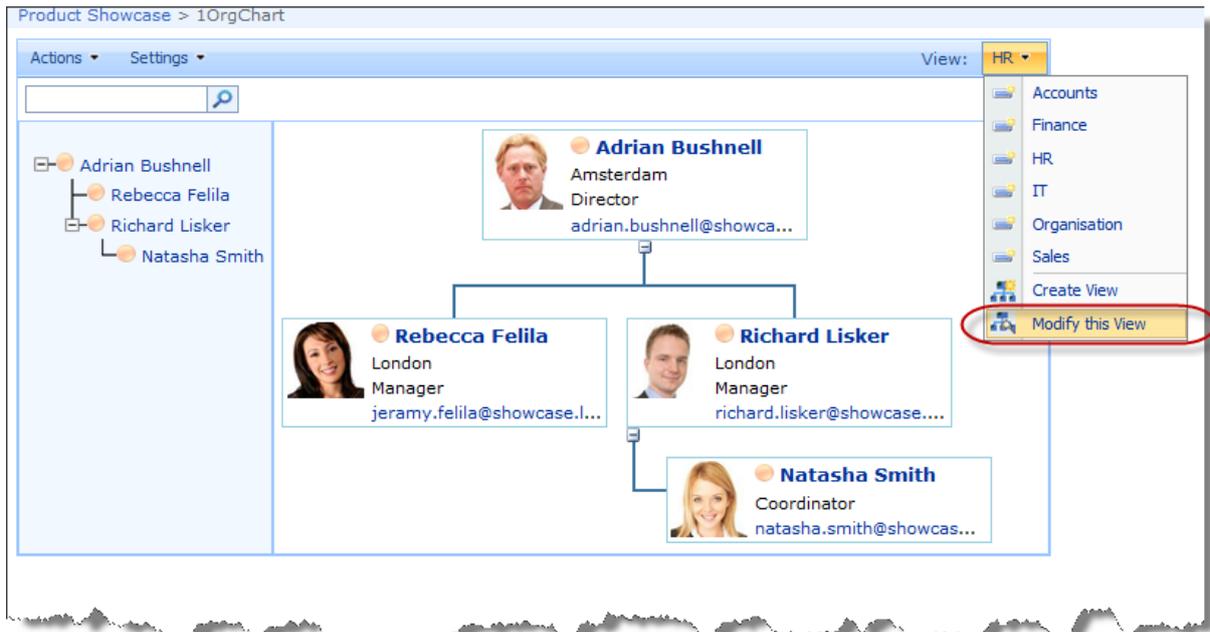


4. The text information required for the Name Link will appear within the URL after **?Name=**

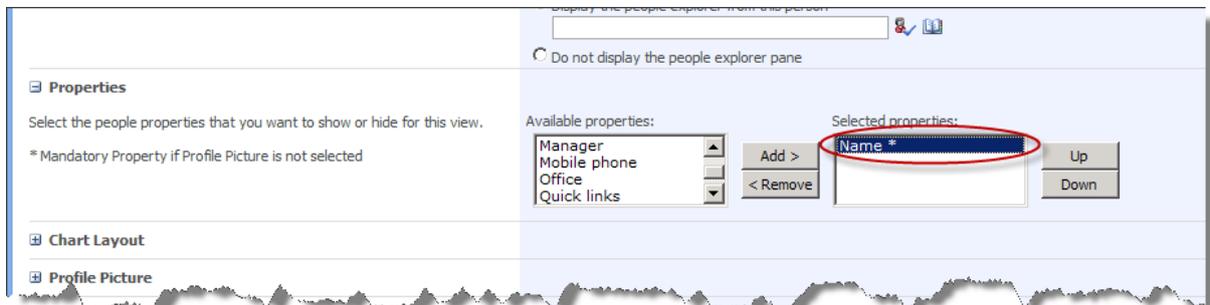


The same process can be applied to any user profile property.

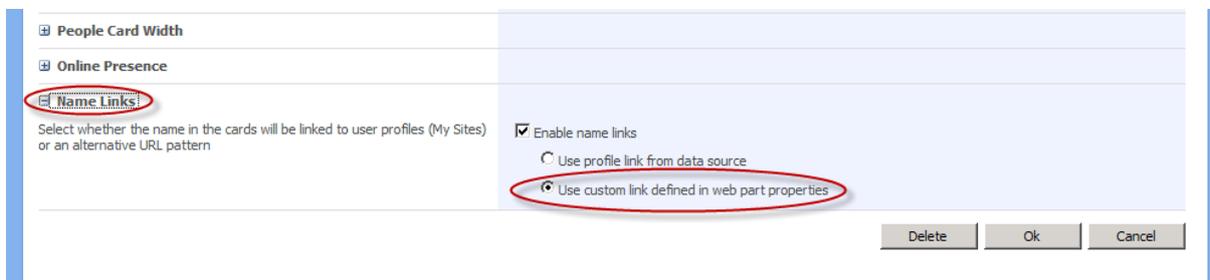
5. Select **Modify this view** for the select/created view



6. Under **Properties**, select the property which will be connected to the base link. E.g. If **Name** is selected, the content within the name property will be searched via the URL provided as the base link. If **Email** is selected, the information within the email property will be used within the search.



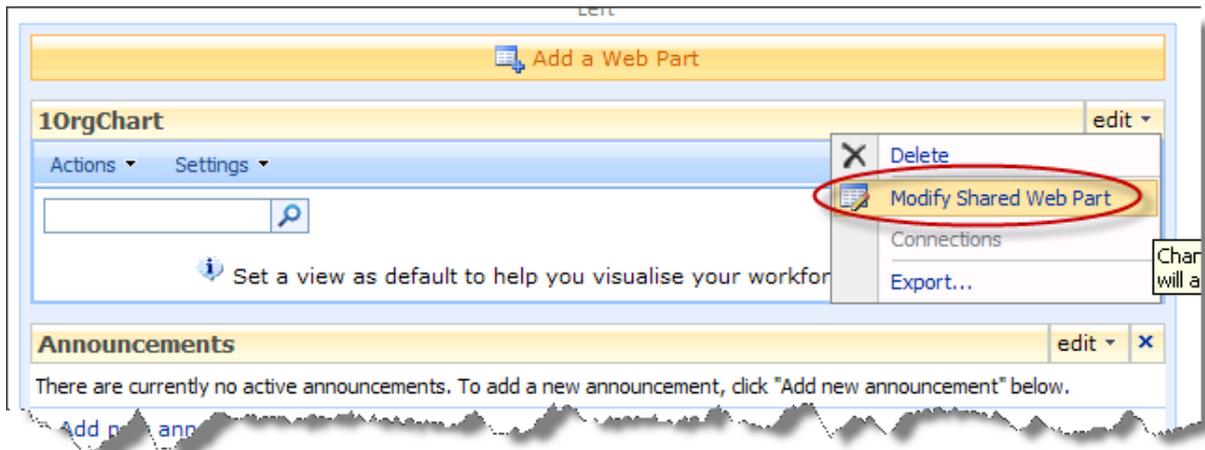
7. Select **Name Links**



8. Select **Use custom link defined in web part properties**

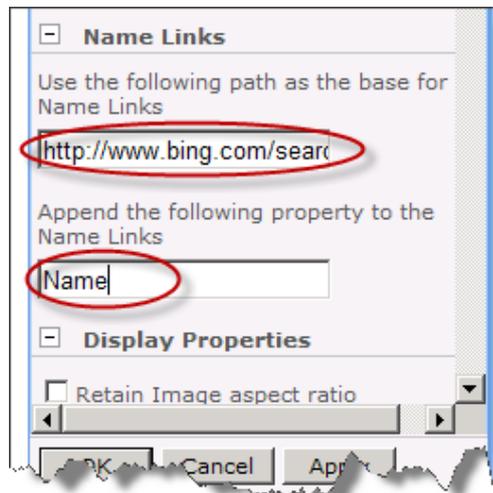
9. Select **Ok**

10. Select **Modified Shared Web Part**

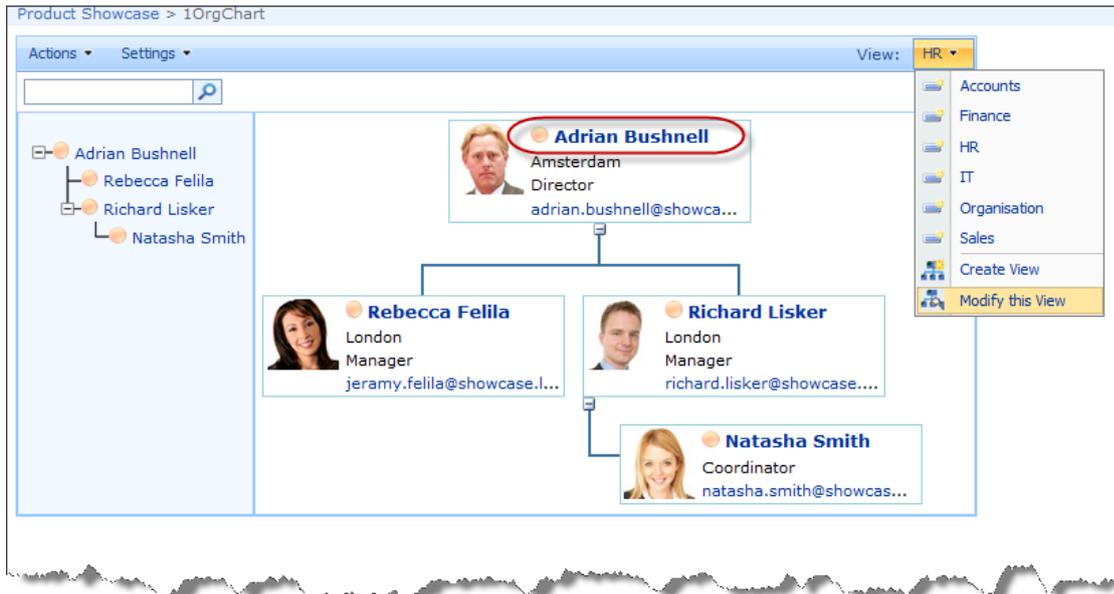


11. In the **Use the following path as the base for Name Links** field, enter an application address which will be used as the base to search. E.g.

<http://www.bing.com/search?src=IE-SearchBox&FORM=IE8SRC&q=>



12. In the **Append the following property to the Name Links** field, enter the desired profile property which will provide a link to the search base. If the **Name** property is entered, the information contained within the **Name** property will be used in the search.



2.1.4 Display Properties (Styling 1OrgChart)

The following instructions will guide you through the steps to use and link a Custom Web Part CSS within 1OrgChart.

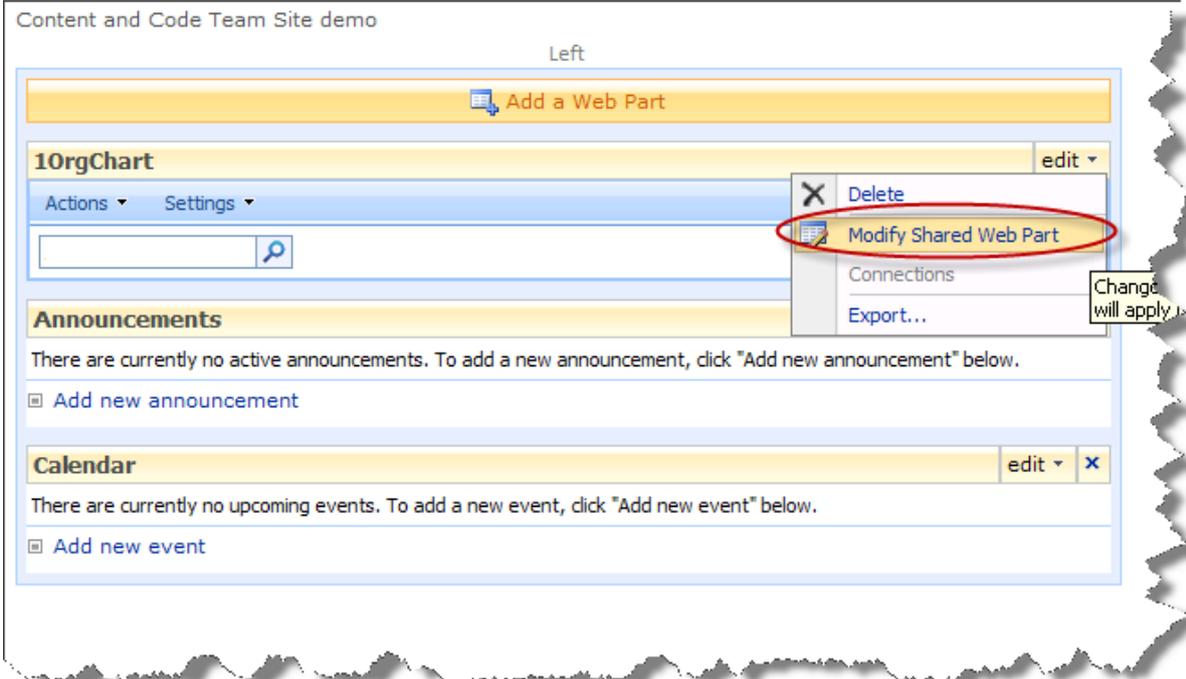
1. To ensure that original 1OrgChart CSS template isn't modified, copy and rename the existing CSS file (**CC1OrgChart.css**) located in **C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\LAYOUTS\CC1OrgChart\Style**
2. To change the profile connection lines within the chart, open the file **CC1OrgChart.css**
3. Within the CSS class titled **.cc-oc-line** edit the background colour and save

```
.cc-oc-line
{
  background-color:red
}
```

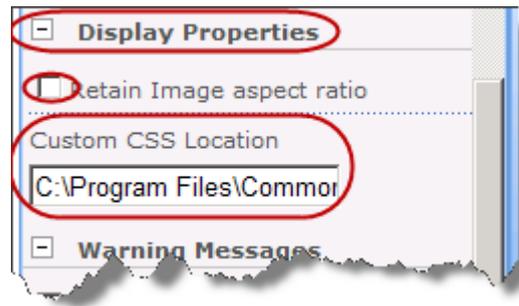
4. The altered CSS class will now be reflected within the web part.



5. To set a custom CSS location select **Site Actions > Edit Page > Modify Shared Web Part**



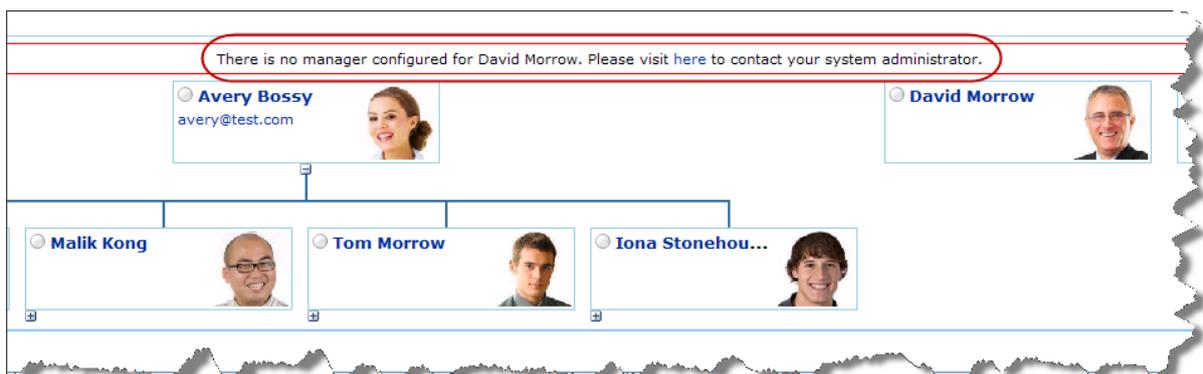
- Under the **Display Properties** header, enter the location of the custom CSS file into the **Custom CSS Location** field.



- Select **Ok**
- To enable retain image aspect ratio, Select and deselect the **Retain Image aspect ratio** box.

2.1.5 Warning Messages

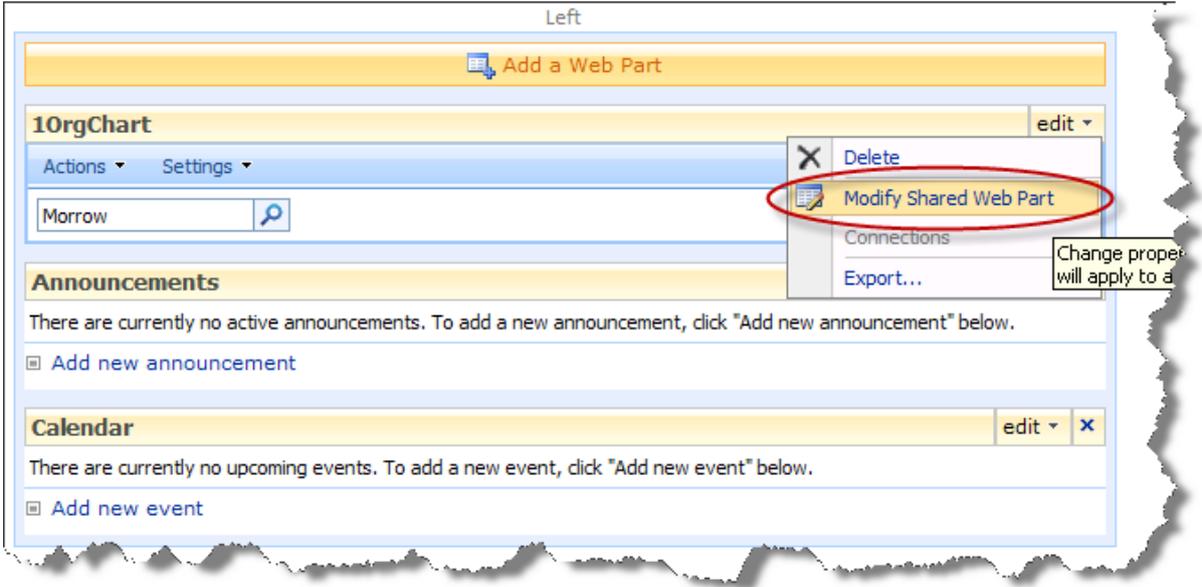
If you would like to be notified when a user does not have information within the manager field, **Friendly Error Messages** can be enabled.



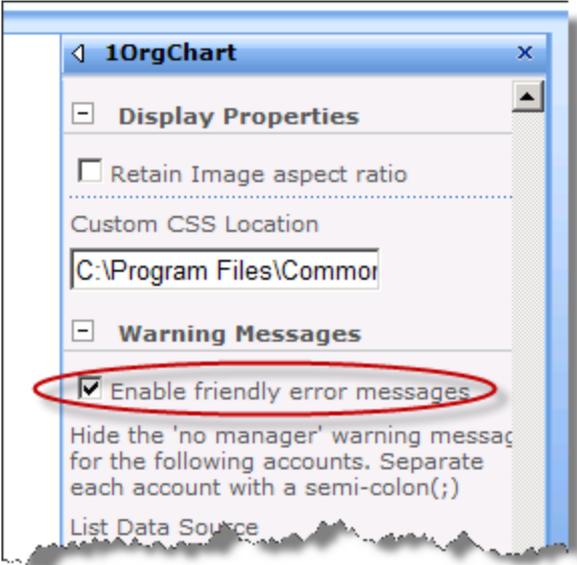
When a manager is not applied within user profile information, an error message will be displayed above 1OrgChart listing the user/s that do not have a manager assigned.

To enable friendly error messages, follow these steps.

1. Select **Modify Shared Web Part**

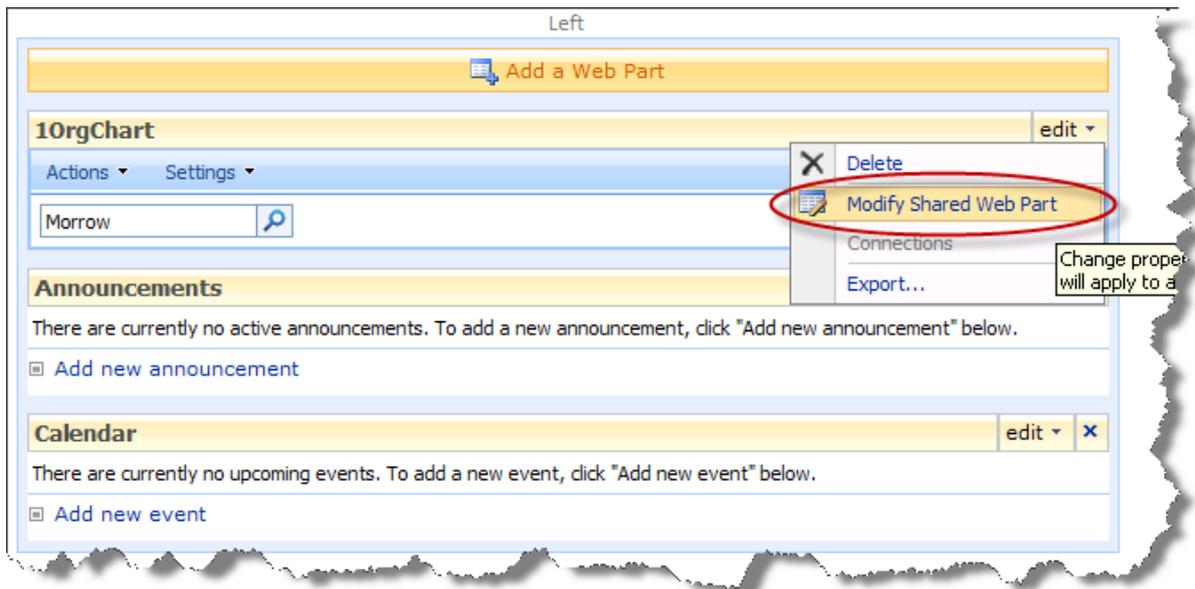


2. Locate the **Warning Messages** option and select **Enable friendly error messages**

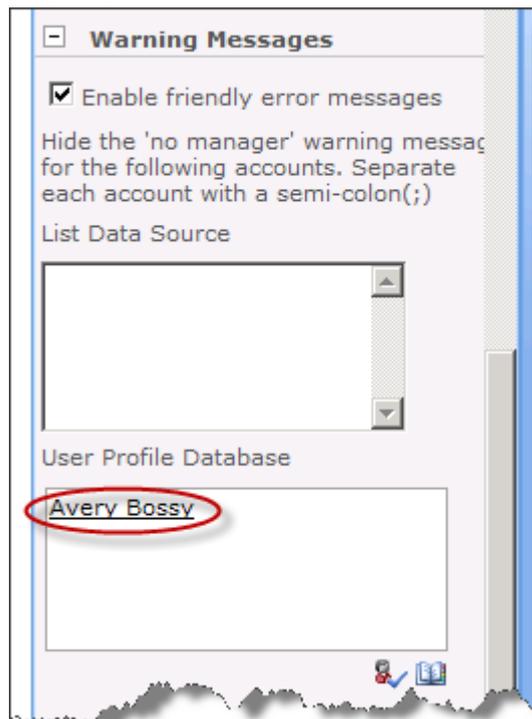


To hide the 'no manager' warning message, follow these steps.

1. Select **Modify Shared Web Part**



2. Locate the **Warning Messages** option



3. To hide the manager warning message for particular individuals, enter the user profile name within the **User Profile Database** field.

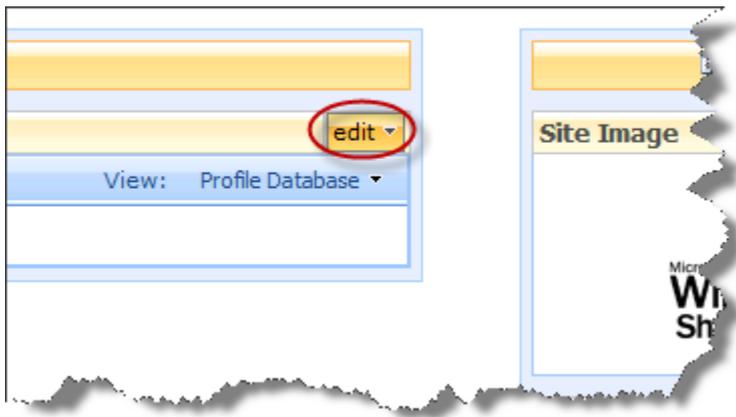
2.1.6 Enable/Disable Printing Options

The **Save** and **Print** options can be enabled or disabled in the web part properties.

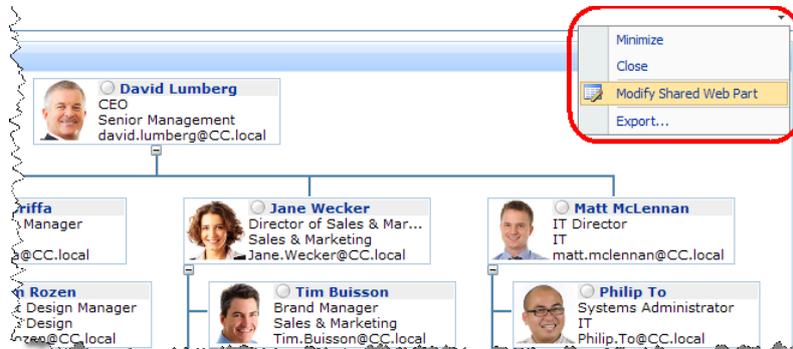
Important: The Printing features require Internet Explorer 7 or later installed on all web front-end servers that are part of the SharePoint server farm. If you do not have Internet Explorer 7 or later installed, the Printing option will be disabled by default.

To enable/disable the printing follow these steps.

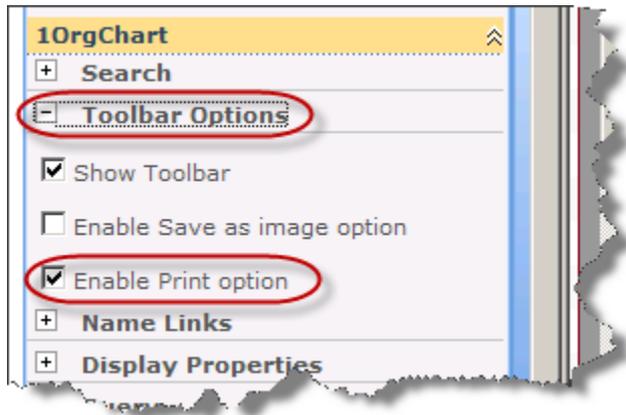
1. Click **Site Actions > Edit Page**
2. On the 1OrgChart web part, click **Edit**



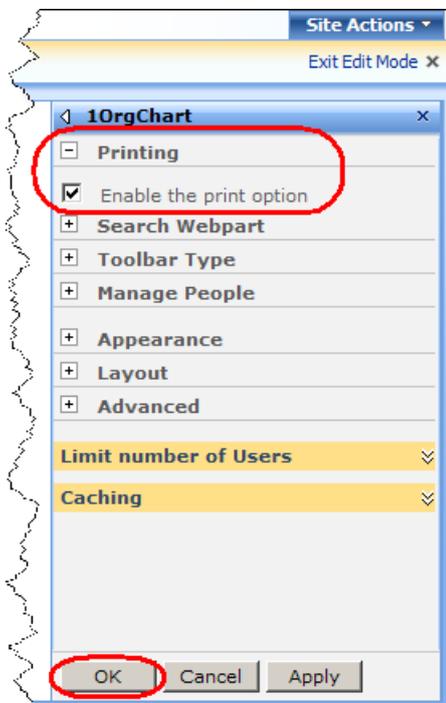
3. Click **Modify Shared Web Part**



4. In the web part properties, expand the section **Toolbar Options**



5. Select or deselect the **Enable the print option**



3 Using 1OrgChart

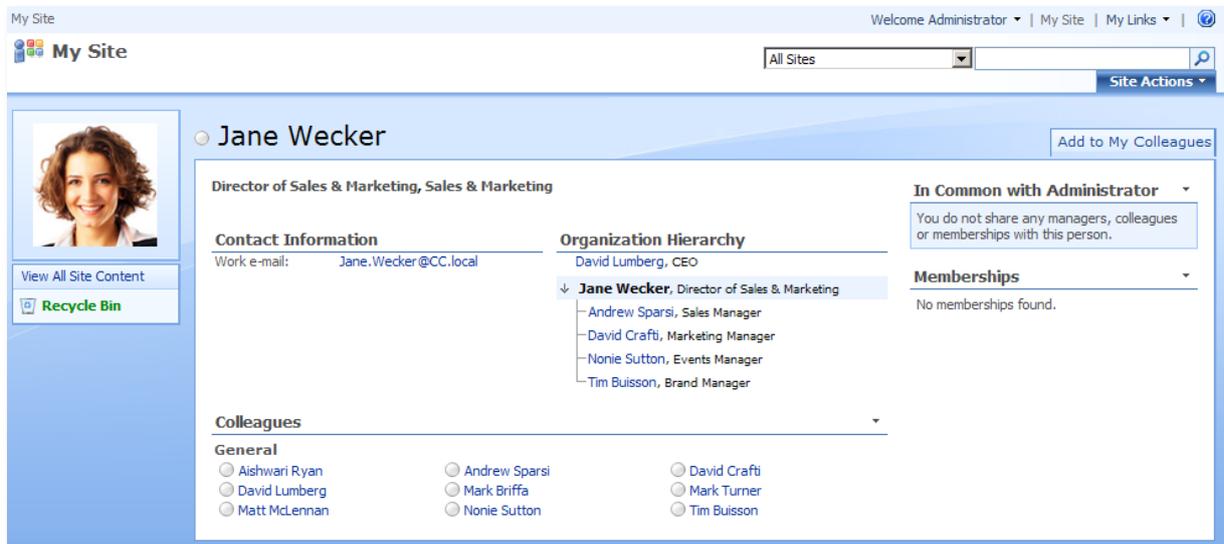
3.1 View My Site

1OrgChart allows you to link directly to a User's My Site to learn more information about them.

1. Click the users name



2. If you have Microsoft Office SharePoint Server 2007, the user profile page (i.e. My Site profile) will be displayed.



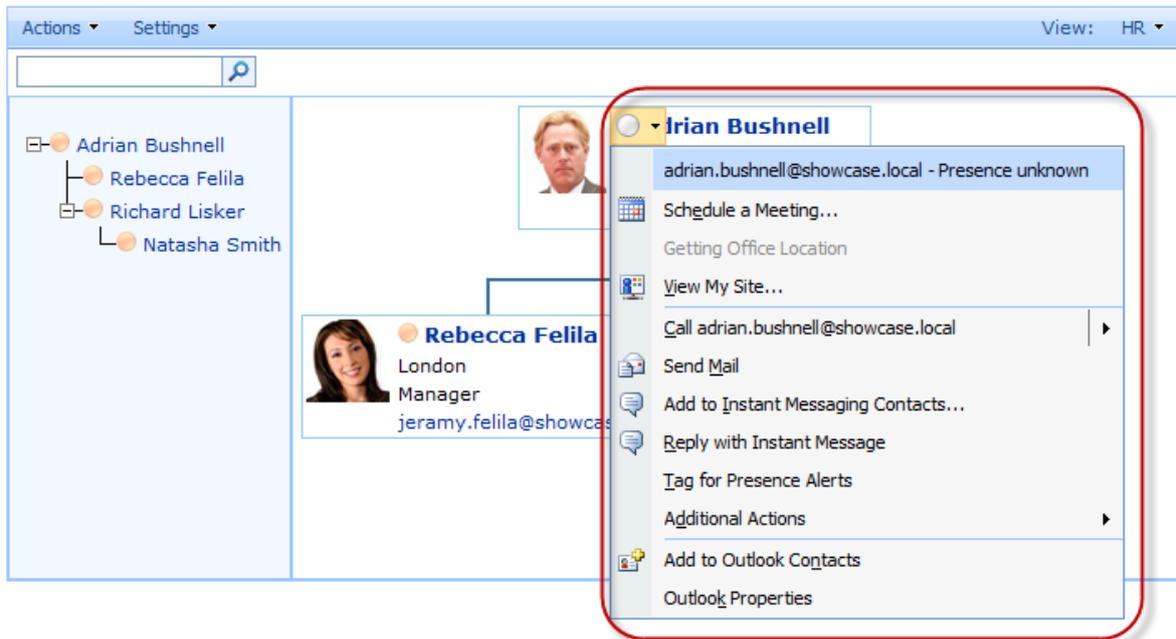
3.2 Online Presence

Online Presence functionality is a standard SharePoint feature that can be used to perform a number of tasks including checking a person's availability, sending an email and viewing their Outlook information. Provided online presence is available in SharePoint, 1OrgChart people cards can also be configured to include this feature.

If your chart has Online Presence selected, then this option will appear in the right hand side of the People Card (see screen shot below).

Important: The Online Presence options that appear in the dropdown will vary depending on the Microsoft software that is installed on each individual client computer as well as the local Internet Explorer settings on the client computer. Software products that will extend your Online Presence functionality include Microsoft Office Communicator, Windows Messenger, MSN Messenger, Live Messenger and Microsoft Exchange Server. For further information visit the Microsoft website.

1. Click the Online Presence icon
2. Select from the available Online Presence options



3.3 Manage People

The Manage People option in 1OrgChart enables you to hide selected people from being displayed in the 1OrgChart views.

1. From the 1OrgChart **Settings** drop-down, select **Manage People**
2. Click Manage People

Note: The Manage People option is only available site administrators



3. In the Organisation Chart Data Source, select either **Profile Database** or **Custom List**



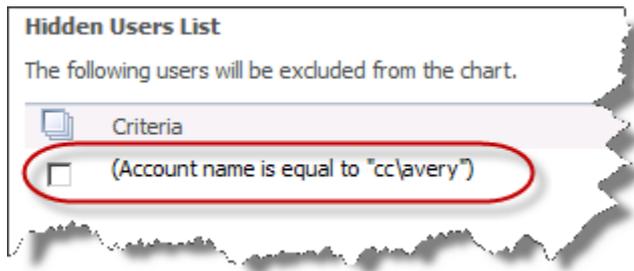
3.3.1 Hide Selected Users

To hide selected users, follow these steps

1. Select '**Hide selected users**'
2. Enter the name of the user(s) you wish to hide



3. The chart will now be displayed **without** the selected users

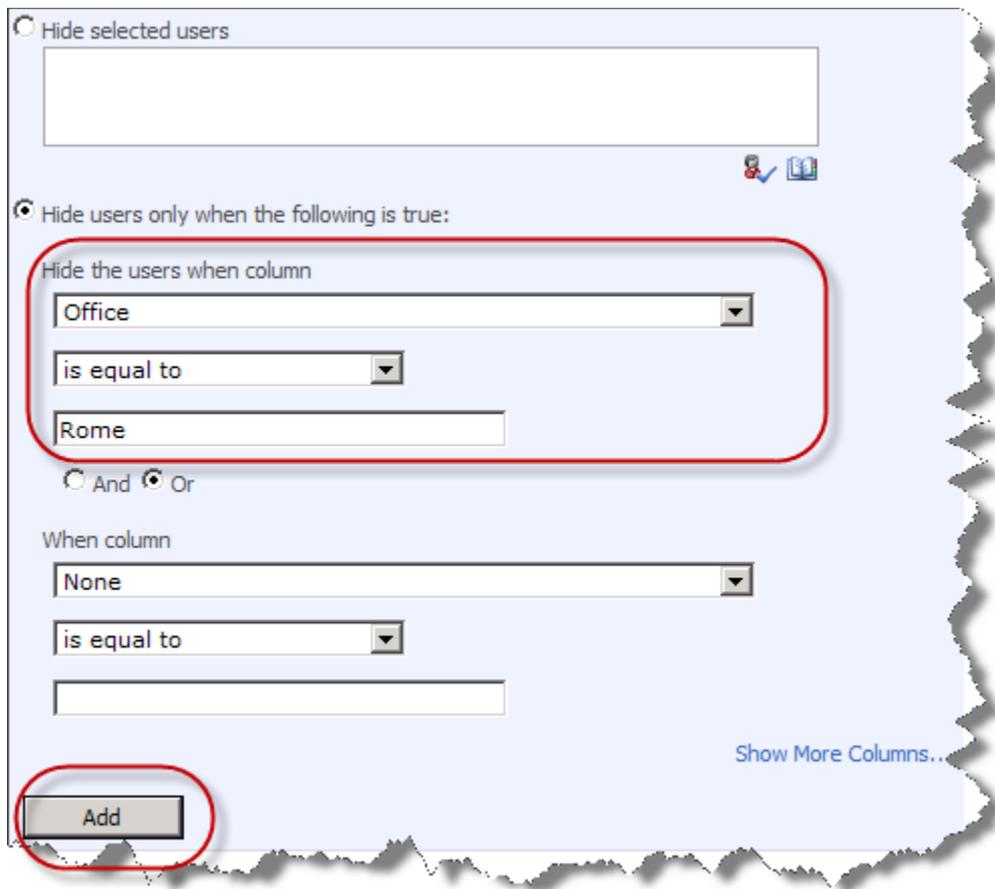


4. Click **OK** to confirm

3.3.2 Hide users only when the following is true

To hide users based on profile information, please follow these steps:

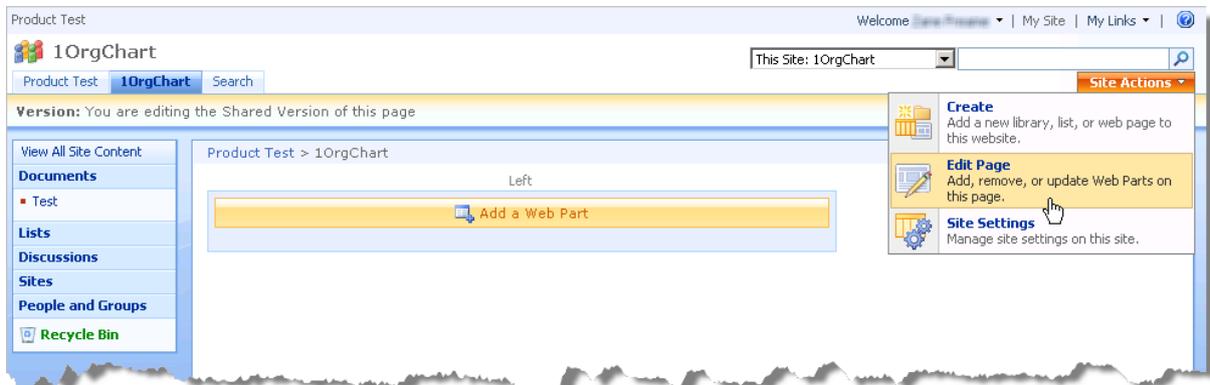
1. Select **Hide users only when the following is true**
2. Select and enter the attributes that you wish to hide



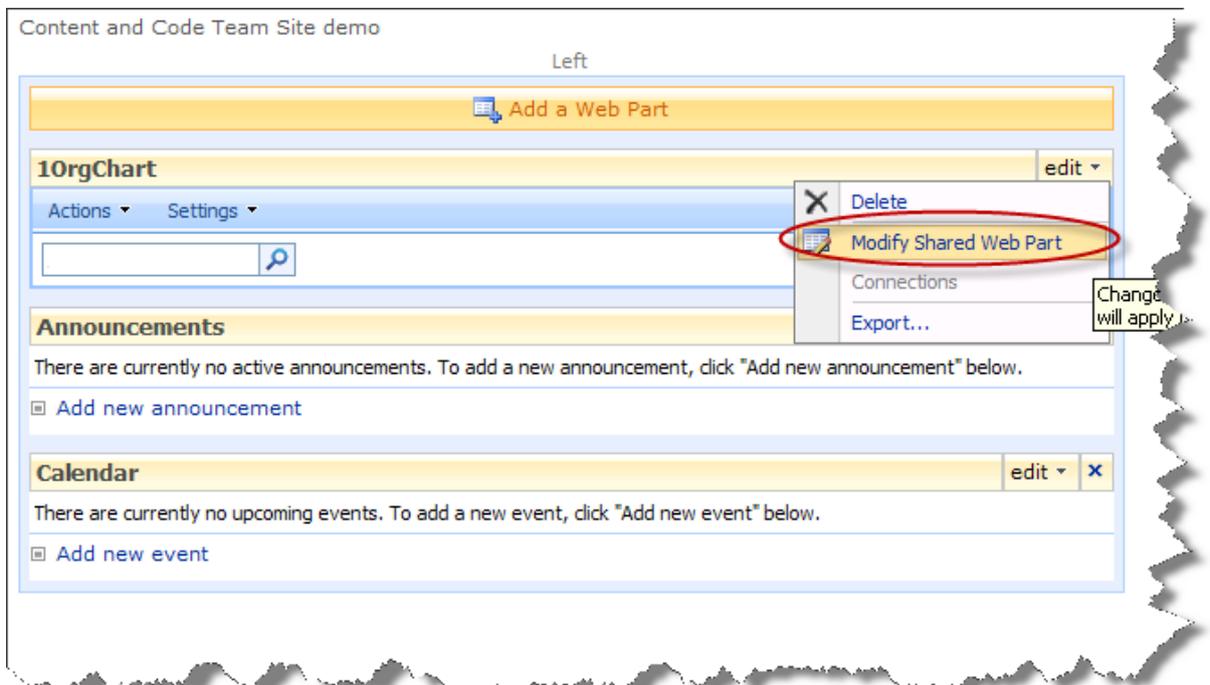
3. Click **Add**
4. Click **OK** to confirm

3.4 Apply a Colour Code

1. Click **Site Actions > Edit Page**



2. Click **Modify Shared Web Part**



3. Navigate to the **Display Properties** option

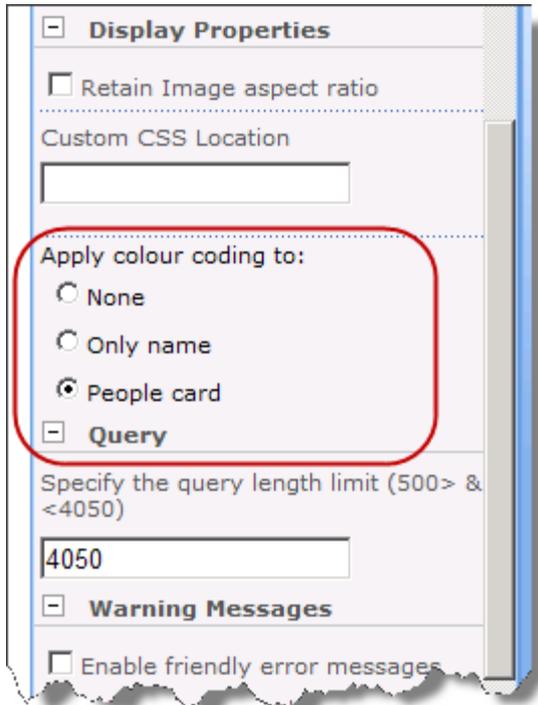


Figure 1 - None



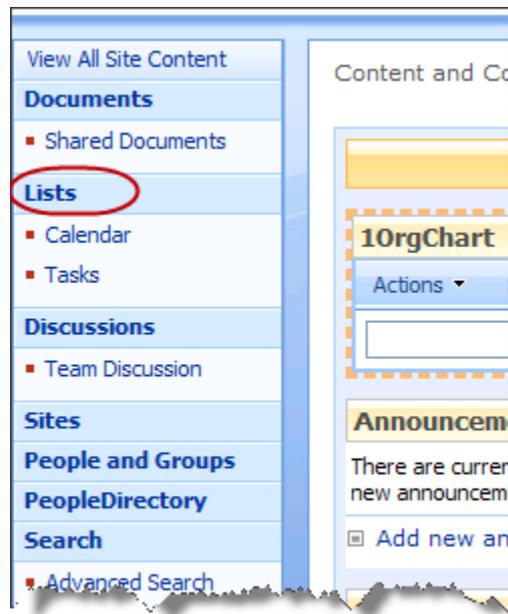
Figure 2 - Only Name



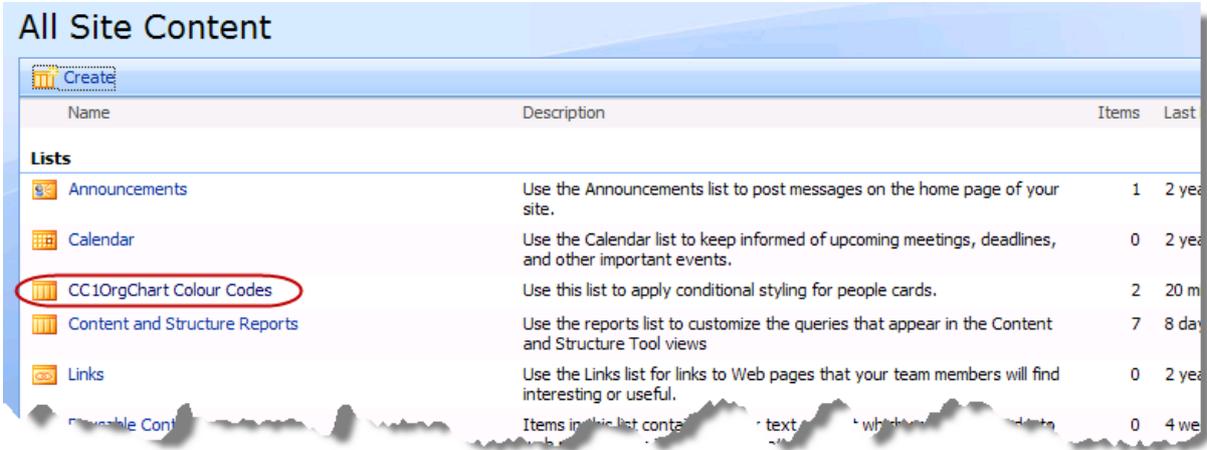
Figure 3 - People Card

4. Select the option that you want to apply colour coding to.

5. Navigate to the top of the site and select **Lists**



6. Select **CC1OrgChart Colour Codes**



7. Select **New > New Item**



8. Type the following into the New Item form.
 - a. **Column Name:** e.g. Department, Manager, Job Title
 - b. **Value:** e.g. IT, HR, Manager
 - c. **Foreground Colour:** Enter a # code or type a colour you wish to appear in the foreground
 - d. **Background Colour:** Enter a # code or type a colour you wish to appear in the background
 - e. **Data source:** Select either User Profiles or SharePoint List (which can be specified within the **Modify View** option)
 - f. **Priority:** Priority of the colour code when two or more colour codes are matching

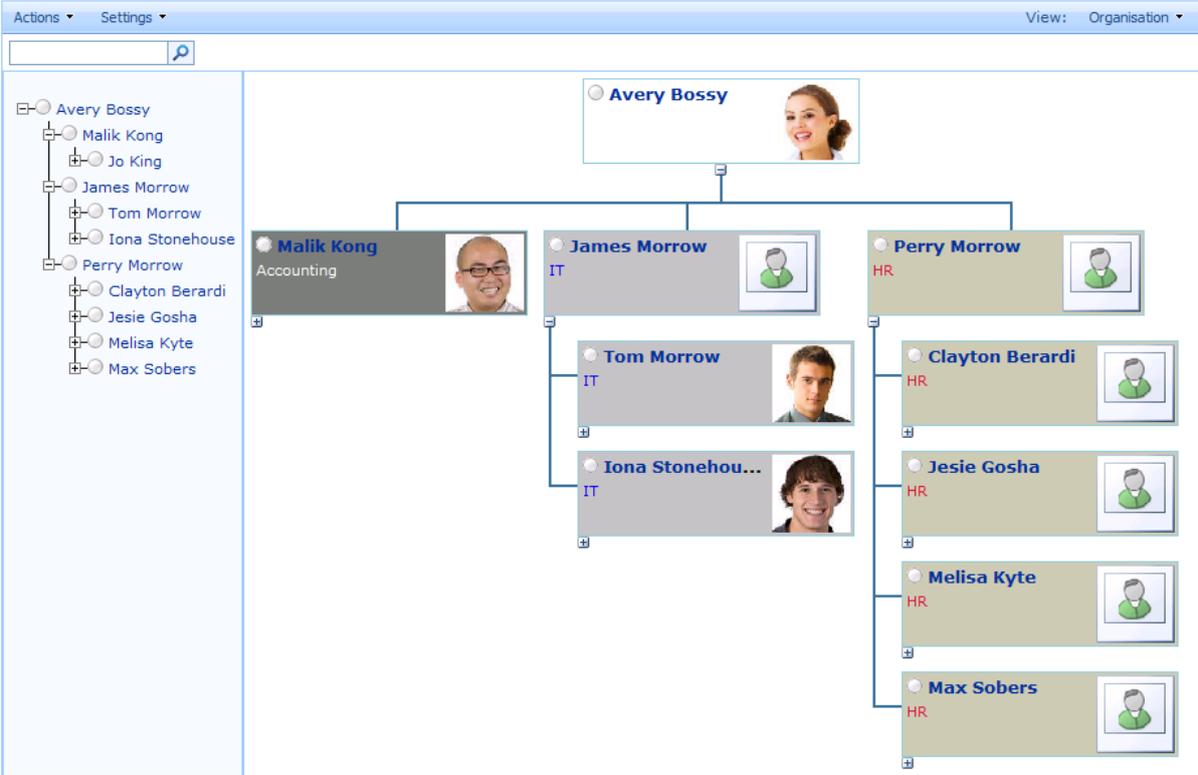
9. Click OK

CC1OrgChart Colour Codes: New Item

📎 Attach File | ABC Spelling... * indicates a required field

Column Name *	<input style="width: 95%;" type="text"/> <small>Name of the column.</small>
Value	<input style="width: 95%;" type="text"/> <small>Enter a value for the column when the colour coding is to be applied.</small>
Foreground Colour	<input style="width: 95%;" type="text"/> <small>Foreground Colour of the Foreground Colour either colour name or six digit hexa-decimal colour code starting with hash (#). Leave it blank to pick from the style applied on the people card.</small>
Background Colour	<input style="width: 95%;" type="text"/> <small>Background colour of the name. Enter either colour name or six digit hexa-decimal colour code starting with hash (#). Leave it blank to pick from the style applied on the people card.</small>
Data Source	<input style="width: 95%;" type="text" value="User Profiles"/> <input type="button" value="v"/> <small>Data source for which the colour coding is to be applied.</small>
Priority *	<input style="width: 95%;" type="text" value="1"/> <small>Priority of the colour code when two or more colour codes are matching.</small>

10. Your colour codes will now be applied.



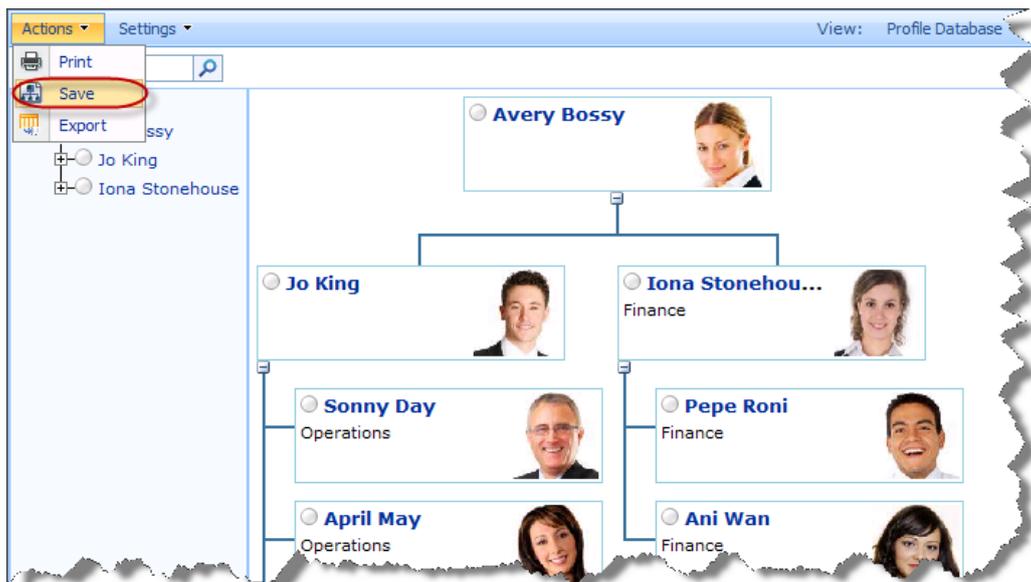
3.5 Save

The Save option can be used to save a single chart view as a .JPG image file.

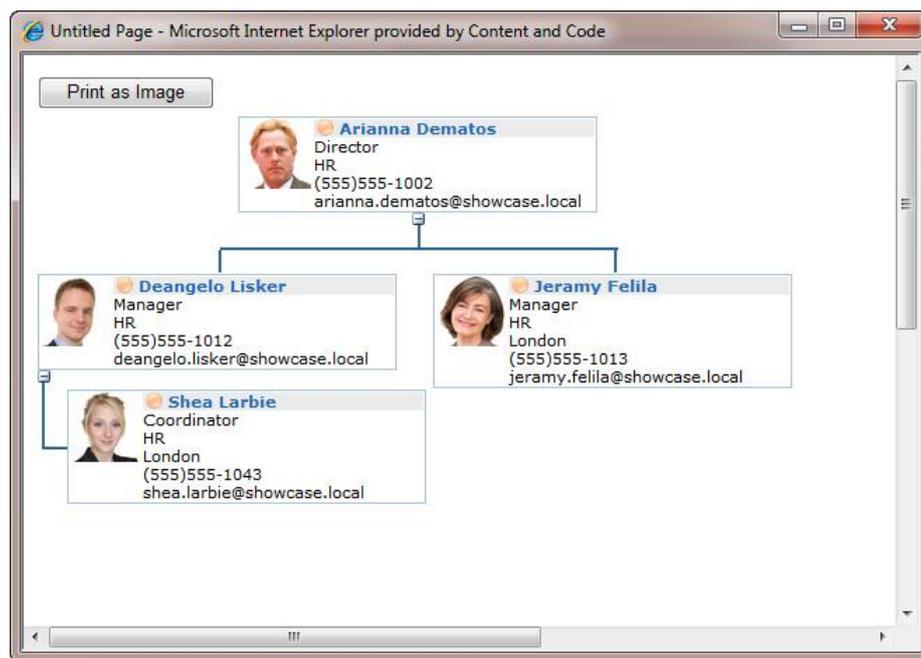
Important: This feature requires that Internet Explorer 7 or later is installed on all web front-end servers. Refer to section **2.1.6 - Enable/Disable Printing** for details on how to enable or disable this option.

To save a chart as a JPEG image follow these steps.

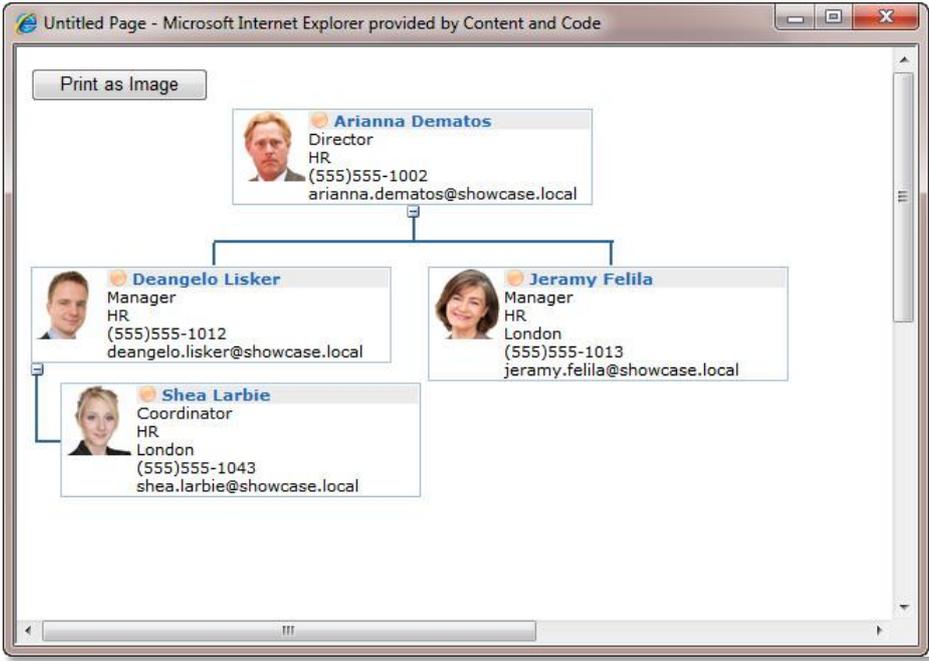
1. From the 10OrgChart **Settings** drop-down, select **Print as Image**



2. A preview of your chart will appear
3. Click **Save**



4. Click **Open** to open the JPEG image, or click **Save** to save the JPEG file to another location



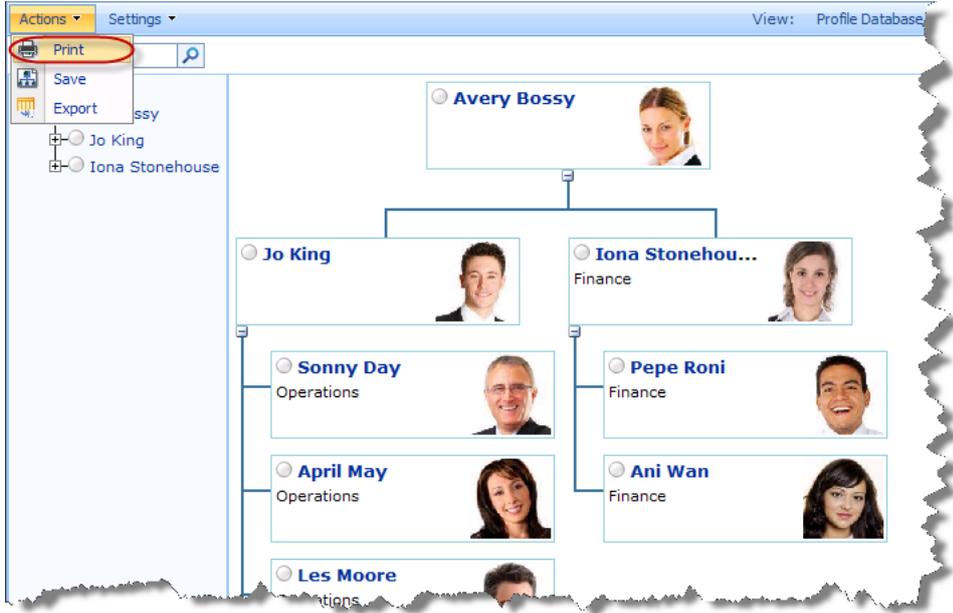
3.6 Print

The Print to Printer option can be used to print a chart view.

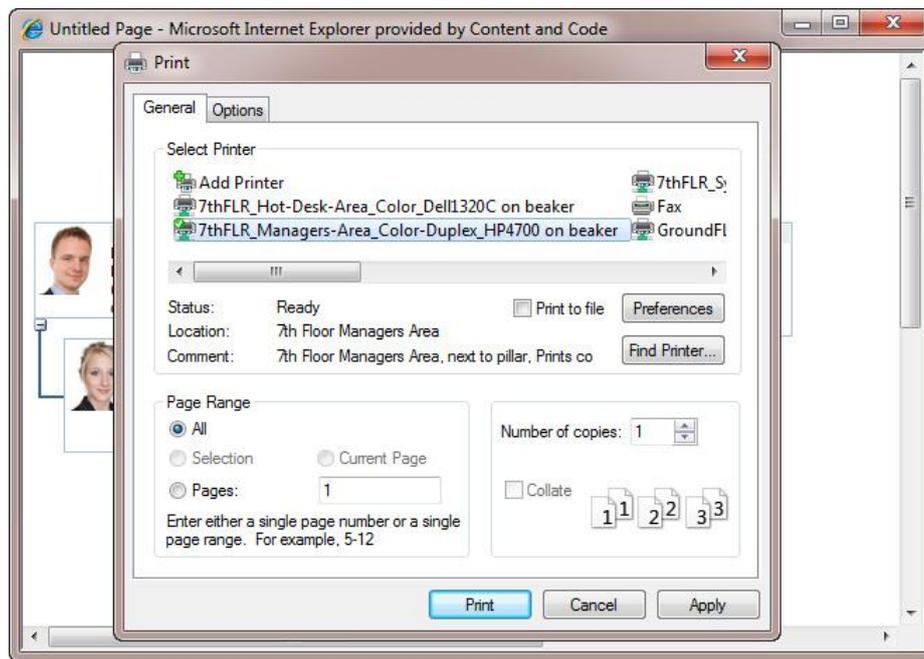
Important: This feature requires that Internet Explorer 7 or later is installed on all web front-end servers. Refer to section 2.1.6 - *Enable/Disable Printing* for details on how to enable or disable this option.

You can print your charts to a printer by following these steps.

1. From the 10OrgChart **Settings** drop-down, select **Print to Printer**



2. Select a printer
3. Click **Print**



Note: The images generated from **Print as Image** and **Print to Printer** will appear exactly as the chart displays on your portal. If you wish to remove items such as Online Presence or the width of the People Cards, you can do this by modifying the chart view or by editing the web part properties.

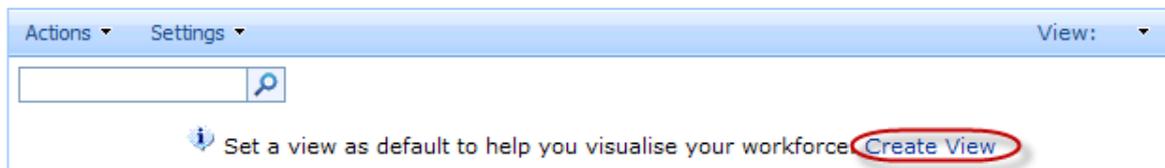
3.7 Views

The following instructions will guide you through the steps to create organisation chart views using 1OrgChart. Firstly, we will take a look at the elements that make up a People Card.

3.7.1 Create View

Each 1OrgChart web part can have a number of views which define how the chart will look. To create a new view, follow these steps.

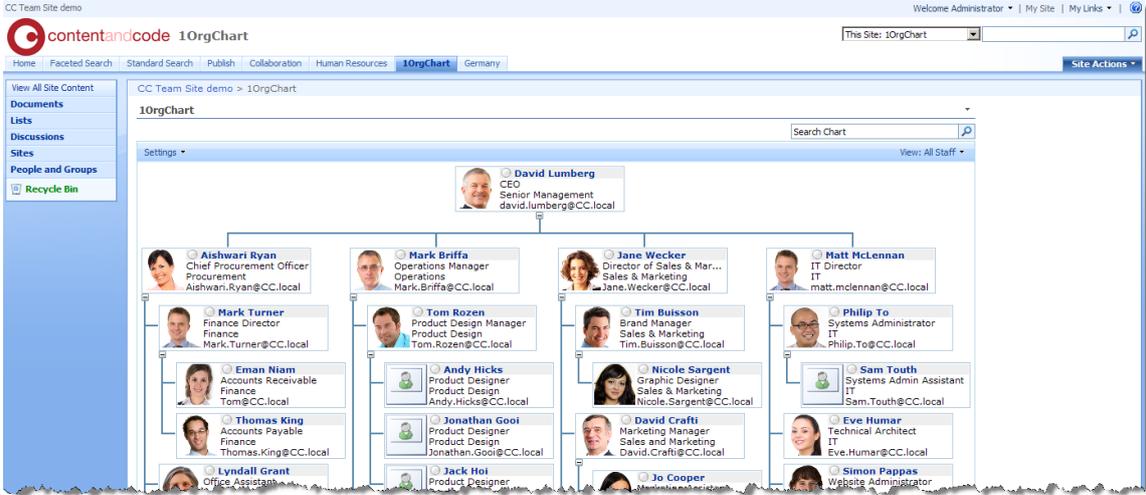
1. Click **Create View** from one of following three options



2. Type a **Name** for the view
3. Decide whether the view will be the **default view** displayed when the page is loaded for the first time
4. Select either **Personal View** (intended for your views only) or **Public View** (seen by anyone using the site)
5. Select the **Data Source** to be used to create the chart:
 - a) Profile Database
 - b) Custom List (click link **View Users in 1OrgChart User Info List** to edit this list)
6. Select one of the following options that represents the intended organisation **chart type** for the view:
 - a) Organisation – creates a chart with all users in the Data Source
 - b) Department – creates a chart that shows users within a single department
 - c) Person – creates a chart with people who report to a single person
7. Select the **Properties** that you would like to appear for each user profile within 1OrgChart
8. Select the **number of levels** that your chart will expand
9. Select to **display profile photos**, and select from the following options:
 - a. Select the image size for the photo displayed on each people card
 - b. Select whether the image is aligned to the Left or Right
10. Select the **width of the People Cards**
11. Select whether to enable **Online Presence** information on each people card
12. Select whether to enable Name Links:
 - a) Use profile link from data source
 - b) Use custom link defined in web part properties
13. Select **Display the Organisation chart by:**
 - a) Display the people explorer pane – Displays a separate navigation to the left of the chart
 - b) Display the people explorer from this person – Specify a user to begin the explorer pane
 - c) Do not display the people explorer pane – Will not show the explorer pane.
14. Click **OK**

<p>Name</p> <p>Type a name for this view. Make the name descriptive, such as "Senior Management", so that site visitors will know what to expect when they click this link.</p>	<p>View Name: <input type="text" value=""/> 2</p> <p><input type="checkbox"/> Make this the default view (Applies to public views only) 3</p>
<p>Audience</p> <p>Select the option that represents the intended audience for this view.</p>	<p>View Audience:</p> <p><input type="radio"/> Create a Personal View Personal views are intended for your views only. 4</p> <p><input checked="" type="radio"/> Create a Public View Public views can be visited by anyone using the site.</p>
<p>Data Source</p> <p>Select what data source will be used to create your chart view.</p>	<p>Create the chart by:</p> <p><input checked="" type="radio"/> Profile Database 5</p> <p><input type="radio"/> Custom List 5</p> <p><input type="text" value=""/></p>
<p>Organisational Hierarchy</p> <p>Select the option that represents the intended organisational chart type for your view.</p>	<p>Display the organisational chart by:</p> <p><input type="radio"/> Organisation</p> <p><input type="radio"/> Department <input type="text" value=""/></p> <p><input checked="" type="radio"/> Person <input type="text" value=""/></p>
<p>Properties</p> <p>Select the people properties that you want to show or hide for this view.</p> <p>*Mandatory Property if Profile Picture is not selected</p>	<p>Available properties: <input type="text" value="Account name"/> <input type="text" value="Birthday"/> <input type="text" value="Department"/> <input type="text" value="End Date"/></p> <p>Selected properties: <input type="text" value=""/></p> <p>Buttons: Add >, < Remove, Up, Down 7</p>
<p>Chart Layout</p> <p>Select whether the chart will be displayed number of levels that your organisational chart will expand</p>	<p>Tree Depth: <input type="text" value="3"/> 8</p>
<p>Profile Picture</p> <p>Select whether profile picture will be displayed in this view</p>	<p><input checked="" type="checkbox"/> Display profile pictures in this view</p> <p>Picture size: <input type="text" value="60"/> pixels (value between 40 and 100)</p> <p>Align picture to the: <input type="text" value="Right"/> 9</p>
<p>People Card Width</p> <p>Select the size and unit for people cards. Card width is the same for all people cards in the view.</p>	<p><input checked="" type="radio"/> Fix the width of people cards to: <input type="text" value="200"/> <input type="text" value="Pixels"/> 10</p> <p><input type="radio"/> Adjust people card width to fit Properties and Profile Picture</p>
<p>Online Presence</p> <p>Enable online presence information.</p>	<p><input checked="" type="checkbox"/> Display Online presence icons and options 11</p>
<p>Name Links</p> <p>Select whether the name in the cards will be linked to user profiles (My Sites) or an alternative URL pattern</p>	<p><input checked="" type="checkbox"/> Enable name links</p> <p><input checked="" type="radio"/> Use profile link from data source 12</p> <p><input type="radio"/> Use custom link defined in web part properties</p>
<p>People Explorer</p> <p>Select whether the people explorer will be displayed for this view and the person that will be displayed at the top tree.</p>	<p><input checked="" type="radio"/> Display the people explorer pane 13</p> <p><input type="radio"/> Display the people explorer from this person <input type="text" value=""/></p> <p><input type="radio"/> Do not display the people explorer pane</p>
<p style="text-align: right;"><input type="button" value="Ok"/> <input type="button" value="Cancel"/></p>	

15. The web part will display the new view



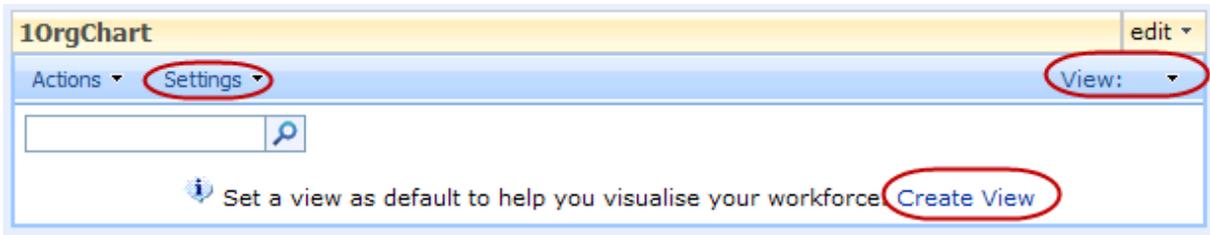
Tip: To remove people cards from your chart you can use the Manage People feature. Refer to section **Error! Reference source not found.** for instructions.

3.7.2 User Information List

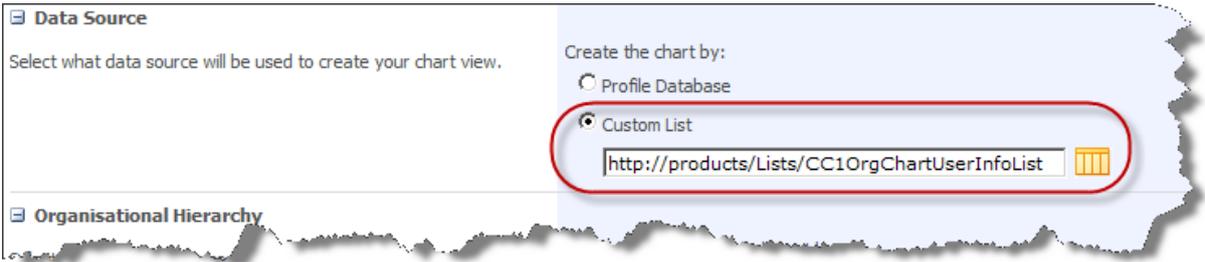
10rgChart can be used to create organisational, departmental, team and meeting charts using a centralised SharePoint list.

Note: For servers running Windows SharePoint Services 3.0 only, this option enables you to create charts without the need for user profiles and My Sites which are standard features in Microsoft Office SharePoint Server 2007.

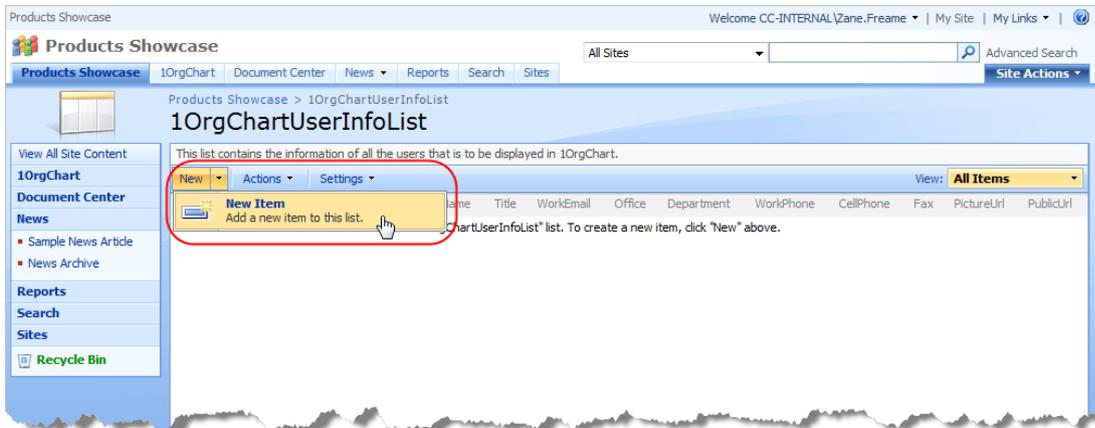
1. **Create View** from one of following three options



2. In the section **Data Source**, select **Custom List**



3. Click the link **View Users in 1OrgChart User Info List**
4. A new window will appear with the **1OrgChart User Info List**
5. To add a person to the list, from the menu click **New > New Item**



6. Complete the following information about the person

- Account Name (required field)
- Manager
- First Name
- Last Name
- Work e-mail (required)
- Office
- Department
- Work Phone
- Cell Phone
- Fax
- Picture URL
- Preferred Name (Required)
- Job Title

CC Team Site demo > CC1OrgChartUserInfoList > (no title) > Edit Item

CC1OrgChartUserInfoList: (no title)

OK Cancel

Attach File Delete Item Spelling... * indicates a required field

Account name *	Scott Bostic
Manager	
First name	Scott
Last name	Bostic
Work e-mail *	scott.bostic@showcase.info
Office	London
Department	Information Technology
Work phone	01458795846
Cell phone	07784457894
Fax	
Picture url	http://portal/hr/staffphotos/scottbostic.jpg
Public url	
Preferred name *	Scott Bostic
Job title	Assistant

Created at 4/1/2010 2:16 PM by
Last modified at 4/7/2010 3:17 PM by

OK Cancel

- 7. Click **OK**
- 8. The person will now appear in the SharePoint list

Products Showcase > 1OrgChartUserInfoList

1OrgChartUserInfoList

This list contains the information of all the users that is to be displayed in 1OrgChart.

New Actions Settings View: All Items

AccountName	Manager	FirstName	LastName	Title	WorkEmail	Office	Department	WorkPhone	CellPhone	Fax	PictureUrl	PublicUrl
Paul Murphy		Paul	Murphy	Team Leader	paul.murphy@showcase.info		Planning Department				http://portal/hr/staffphotos/paulmurphy.jpg	

9. Add additional users to create the organisational hierarchy

Products Showcase > 1OrgChartUserInfoList

1OrgChartUserInfoList

This list contains the information of all the users that is to be displayed in 1OrgChart.

AccountName	Manager	FirstName	LastName	Title	WorkEmail	Office	Department	WorkPhone	CellPhone	Fax	PictureUrl	PublicUrl
Paul Murphy		Paul	Murphy	Team Leader	paul.murphy@showcase.info		Planning Department				http://portal/hr/staffphotos/paulmurphy.jpg	
Philip Walker	Paul Murphy	Philip	Walker	Planning Executive	philip.walker@showcase.info		Planning Department				http://portal/hr/staffphotos/philipwalker.jpg	
Nikolas Top	Paul Murphy	Paul	Murphy	Planning Executive	nikolas.top@showcase.info		Planning Department				http://portal/hr/staffphotos/NIKOLASTOP.JPG	
Candice Bavery	Paul Murphy	Candice	Bavery	Planning Executive	candice.bavery@showcase.info		Planning Department				http://portal/hr/staffphotos/candicebavery.jpg	

10. Return to the Create View page

11. Complete the details for the chart view you wish to create (see section 3.7.1 – Create View)

Create View: 1OrgChart

Use this page to create an organisational chart view.

Ok Cancel

Name
Type a name for this view. Make the name descriptive, such as "Senior Management", so that site visitors will know what to expect when they click this link.

Audience
Select the option that represents the intended audience for this view.

Data Source
Select what data source will be used to create your chart view.

Organisational Hierarchy
Select the option that represents the intended organisational chart.

View Name:

Make this the default view (Applies to public views only)

View Audience:

Create a Personal View
Personal views are intended for your views only.

Create a Public View
Public views can be visited by anyone using the site.

Create the chart by:

Profile Database

Custom List

Display the organisational chart by:

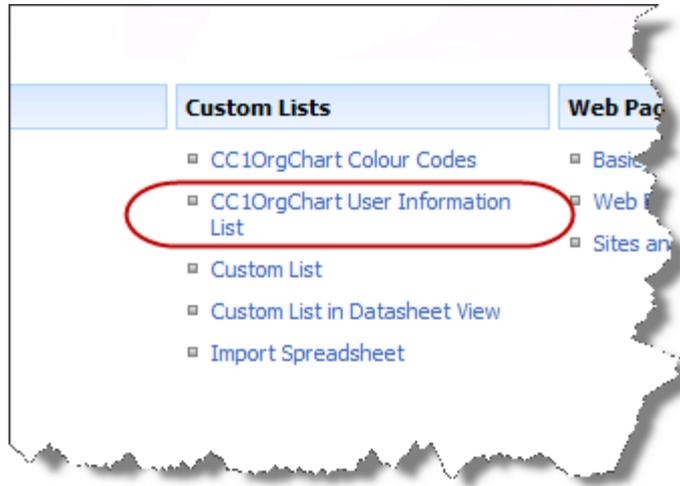
12. Click OK

13. The 1OrgChart web part will display a new view created from the people in the 1OrgChart User Info List



3.7.3 Custom SharePoint List

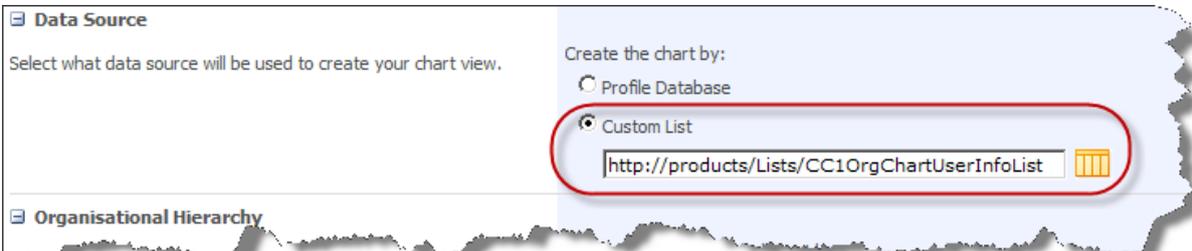
1. Select a location to store your list.
2. Click **Site Actions > Create**
3. Under **Custom Lists** select **CC1OrgChart User Information List**



4. Enter a list **Name** and **Description**



5. Return to the site where 1OrgChart has been added
6. Click **Create View** or **Modify View**
7. Select **Custom List** (the SharePoint default list location will appear in the text field)

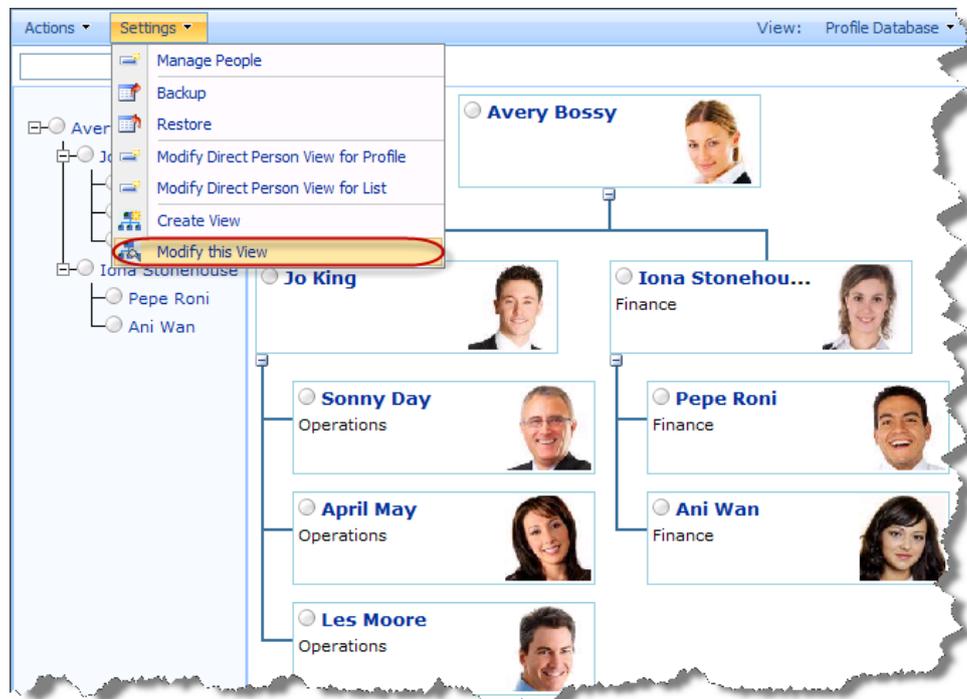


8. Click the location picker icon (as seen above) to select the location of your created list
9. Click **Ok**

3.7.4 Modify a View

Once additional views are created, users can modify these views.

1. From the 10OrgChart **Settings** drop-down, select **Modify This View**

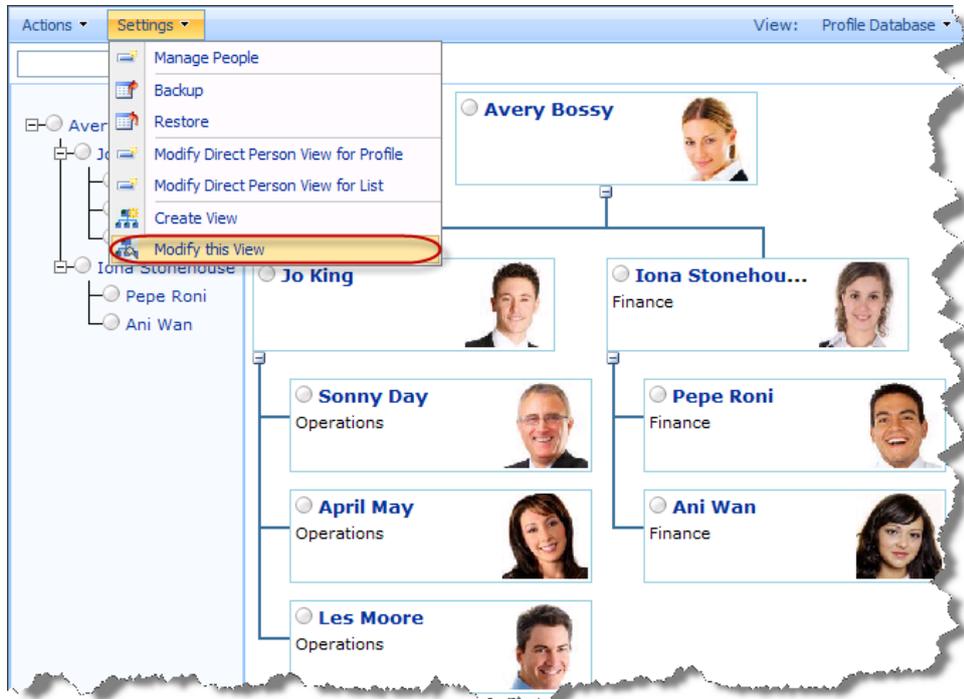


2. Edit the information you wish changed in the view.
3. Click **OK**

3.7.5 Delete a View

To delete a view follow these steps.

1. From the 1OrgChart **Settings** drop-down, select **Modify This View**

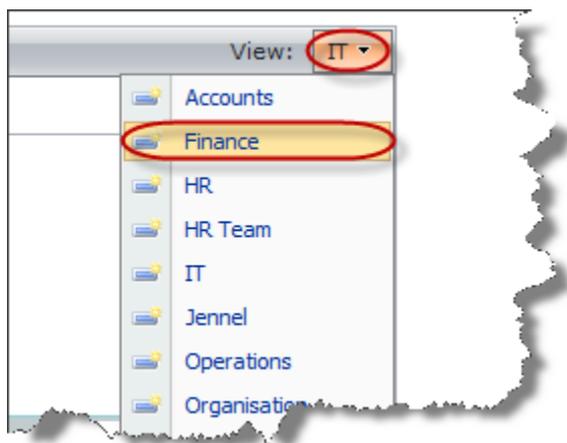


2. Click **Delete**

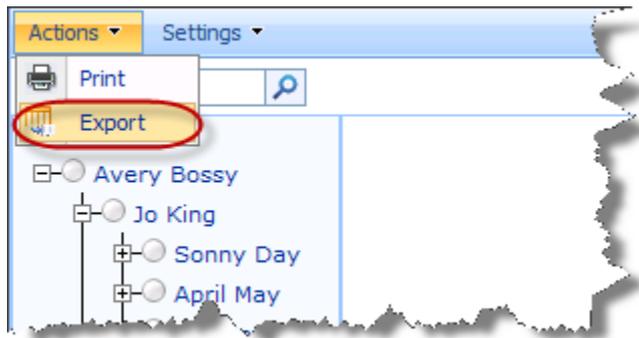
3.7.6 Export to Microsoft Visio

To export views from 1OrgChart to Microsoft Office Visio please follow these steps:

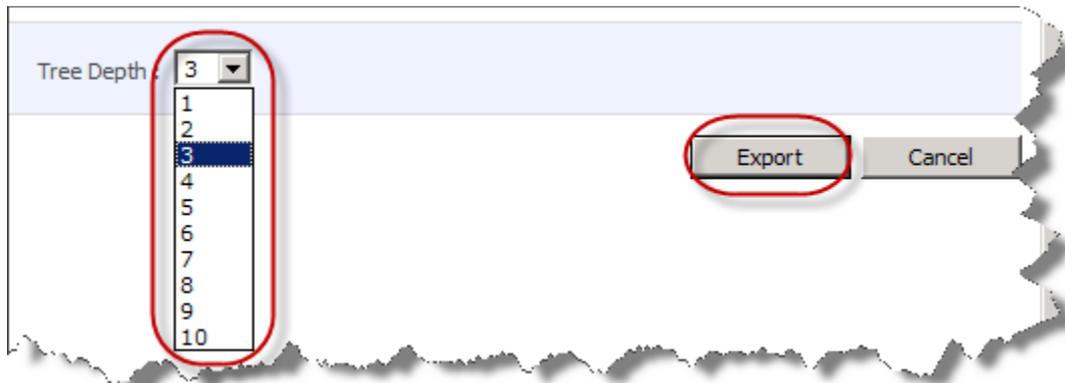
1. Select the view you wish to export



2. Click **Actions > Export**

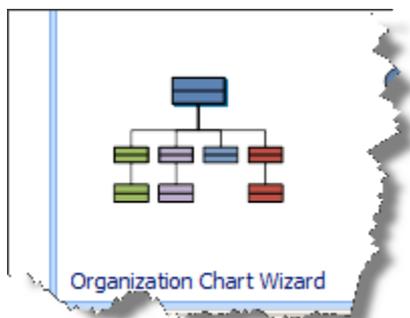


3. Select the depth that your chart will display

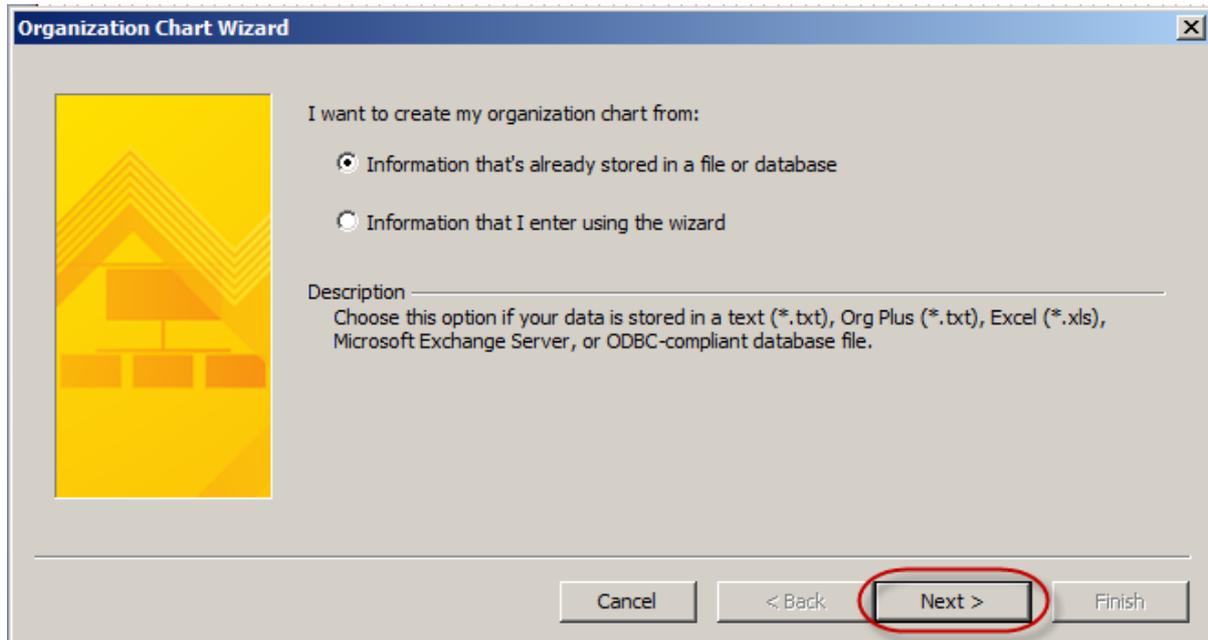


4. Click **Export**

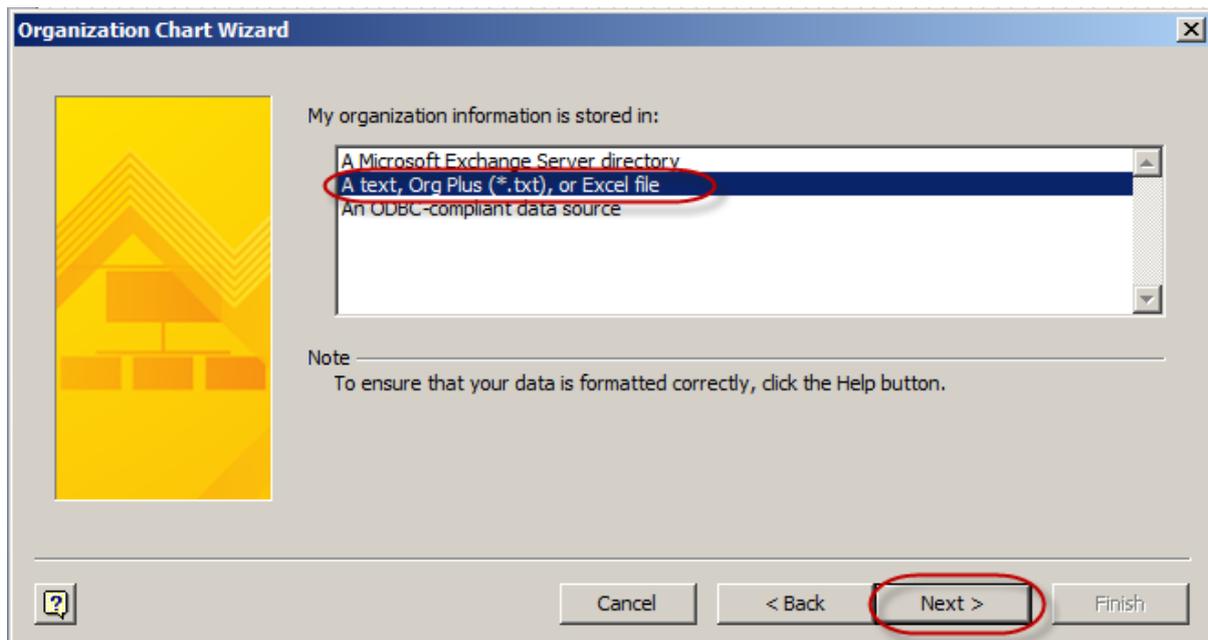
5. Open Microsoft Office Visio and select **Organization Chart Wizard**



6. Select **Information that's already stored in a file or database**
7. Click **Next**

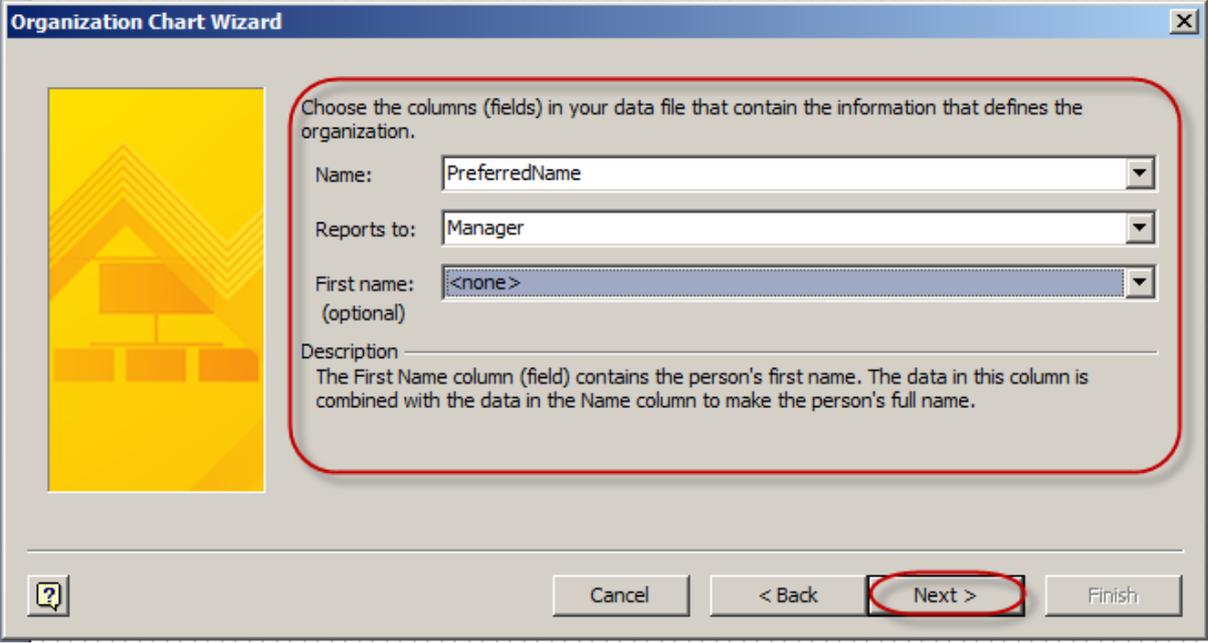


8. Select the option **A text, Org Plus (*.txt), or Excel file**



9. Click **Next**

10. Select the columns in your data file that contain the information that defines the organisation
11. Click **Next**

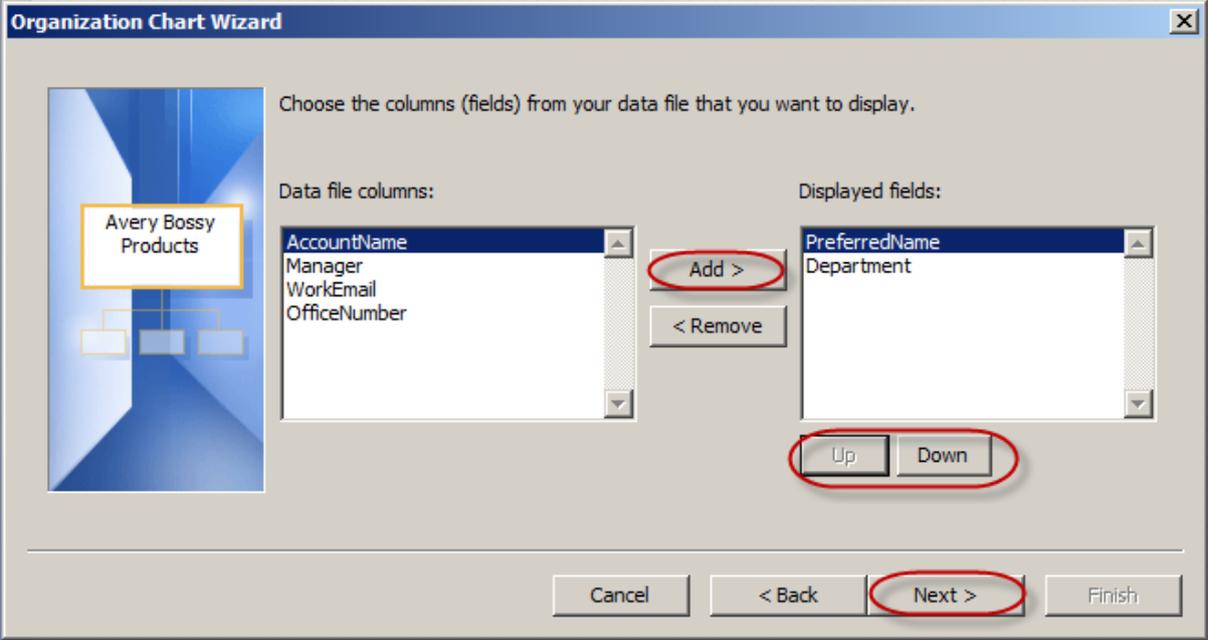


The screenshot shows the 'Organization Chart Wizard' dialog box. On the left is a yellow graphic of an organization chart. The main area contains the following fields:

- Name:** PreferredName
- Reports to:** Manager
- First name: (optional):** <none>
- Description:** The First Name column (field) contains the person's first name. The data in this column is combined with the data in the Name column to make the person's full name.

At the bottom, there are buttons for 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Next >' button is circled in red.

12. Chose the columns from your data file that you wish to display
13. Select the order of the displayed fields. (Previewed on the left)

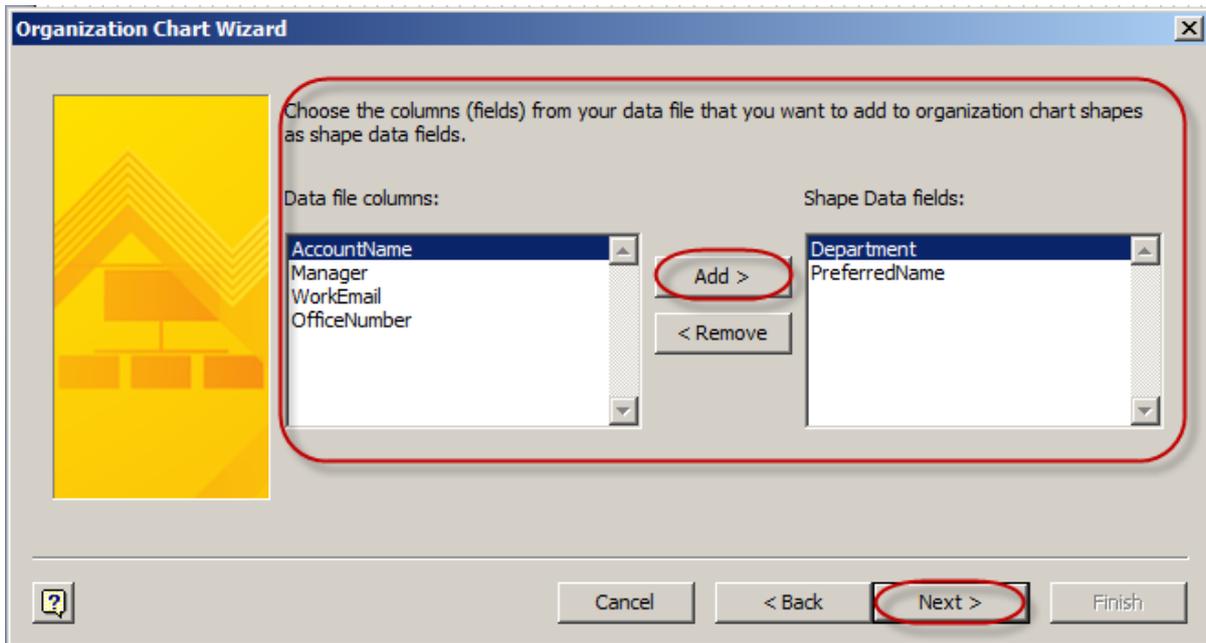


The screenshot shows the 'Organization Chart Wizard' dialog box at a later stage. On the left is a blue graphic of an organization chart labeled 'Avery Bossy Products'. The main area contains the following fields:

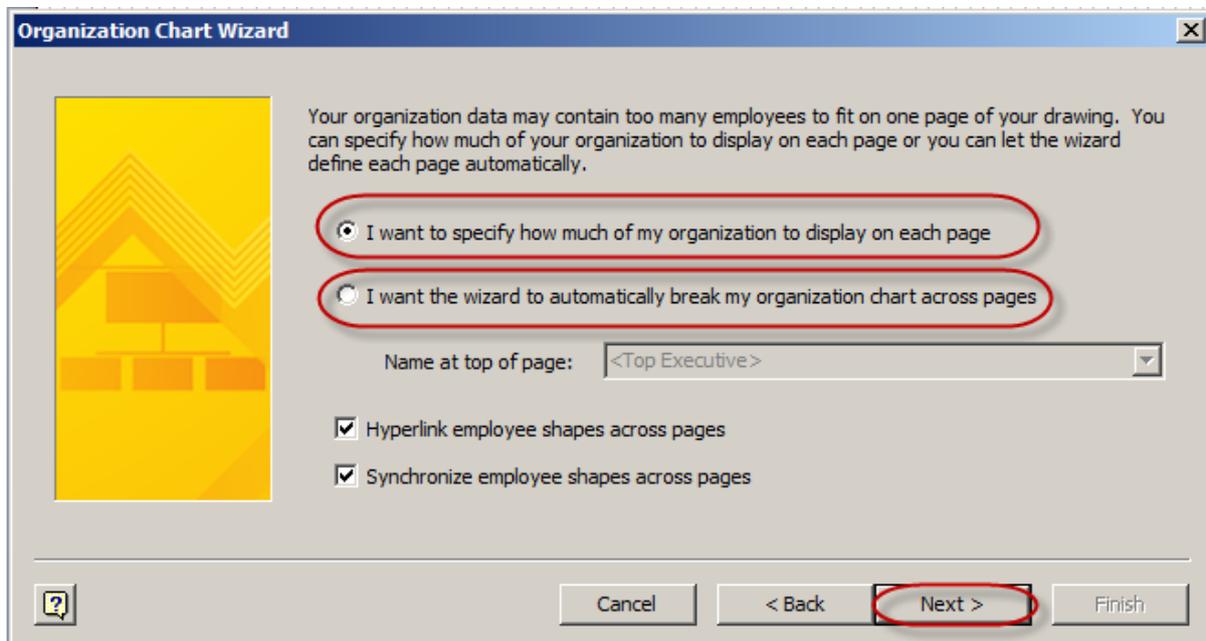
- Data file columns:** AccountName, Manager, WorkEmail, OfficeNumber
- Displayed fields:** PreferredName, Department

Between the two lists are buttons for 'Add >' and '< Remove'. Below the 'Displayed fields' list are 'Up' and 'Down' buttons. At the bottom, there are buttons for 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Add >', 'Up', 'Down', and 'Next >' buttons are circled in red.

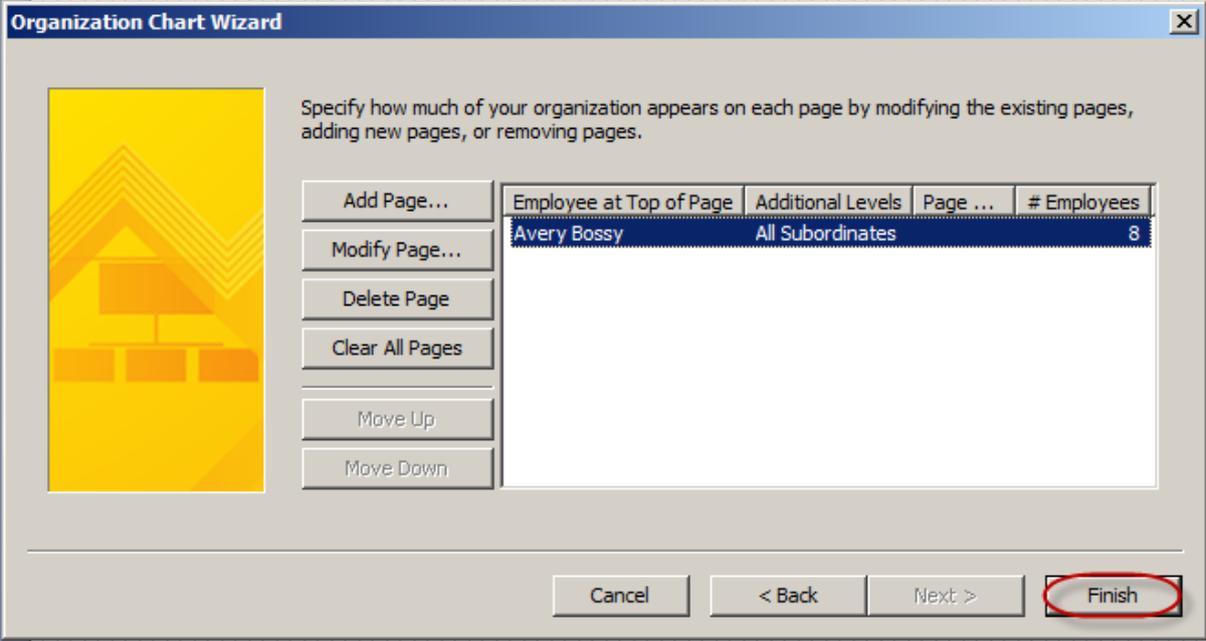
14. Choose the columns from your data file that you want to add to organisation chart shapes as shape data fields.
15. Click **Next**



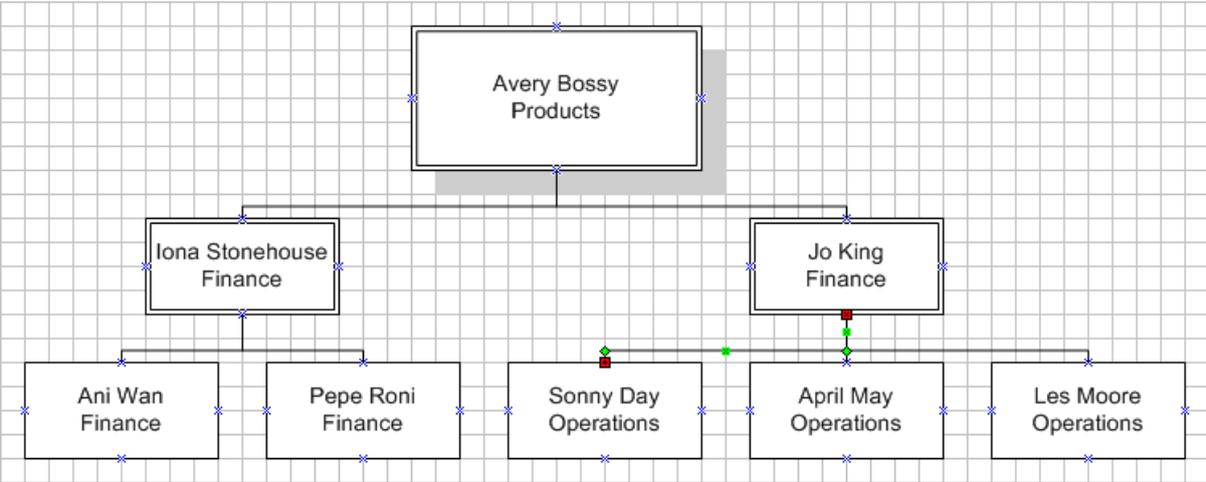
16. Select to personally specify how much of your organisation you want to display on each page, or allow the wizard to automatically break the organisation chart across pages
17. Click **Next**



18. Click **Finish**



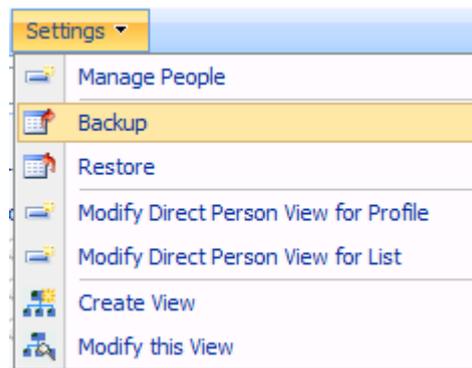
19. The chart will now appear within Microsoft Visio.



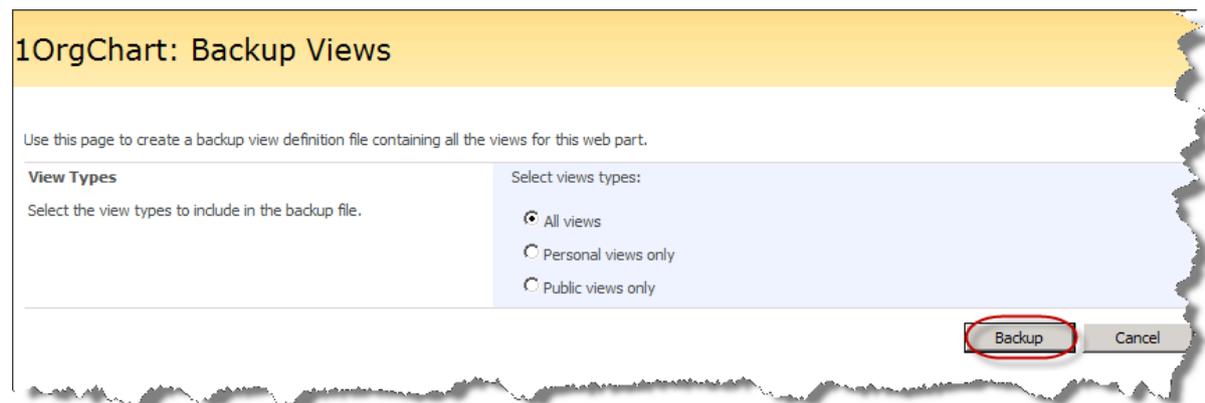
3.7.7 Backup

To export one or more views created within 1OrgChart, follow these steps.

1. From the **Settings** menu, select **Backup**
2. Select the desired view to be exported
3. Click **Backup**
4. Save the **View Definition** file (with file extension **.1vd**)



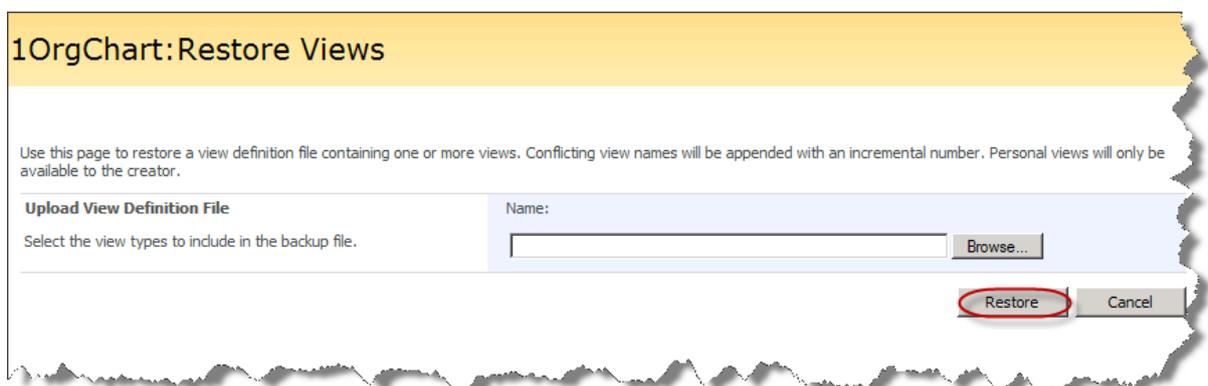
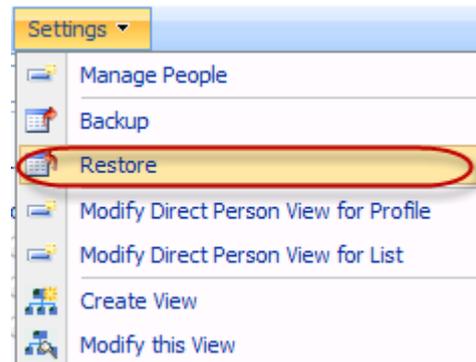
The exported file can now be used to import the View data into an upgraded version of 1OrgChart.



3.7.8 Restore

To import one or more views contained within a View Definition file, follow these steps.

1. From the **Settings** menu, select **Restore**
2. Select the **View Definition** file (with file extension **.1vd**)
3. Click **Restore**



Note: View Definition files can be backed up and restored between current or previous versions of 1OrgChart (requires 1OrgChart version 4.0.1.9 or higher for both restore and backup).

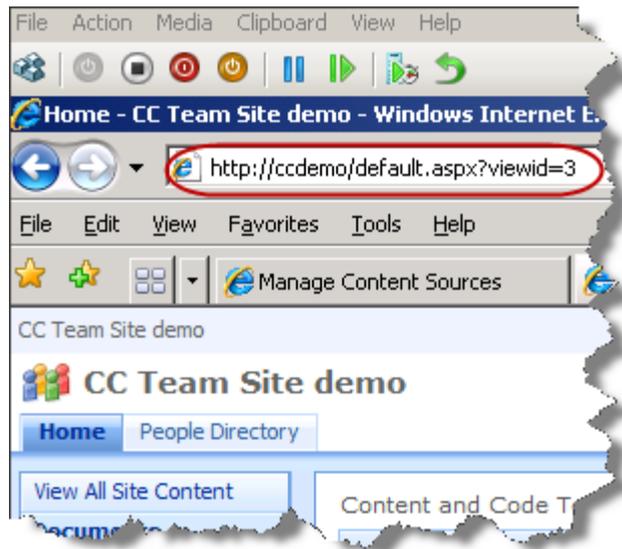
3.8 Direct Person View

The Direct Person view allows direct access to a particular user profile by using a personal e-mail address within the URL.

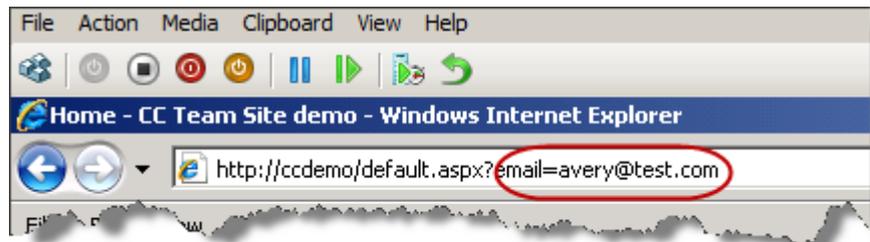
Important: E-mail address will need to be applied to the profile information for the URL to find the correct user.

To find a user using an email address within the URL, follow these steps.

1. Go to the URL where 1OrgChart is present



2. Remove **viewed=3** from the URL and replace it with **email=** followed by the email address of the individual you wish to find and view.

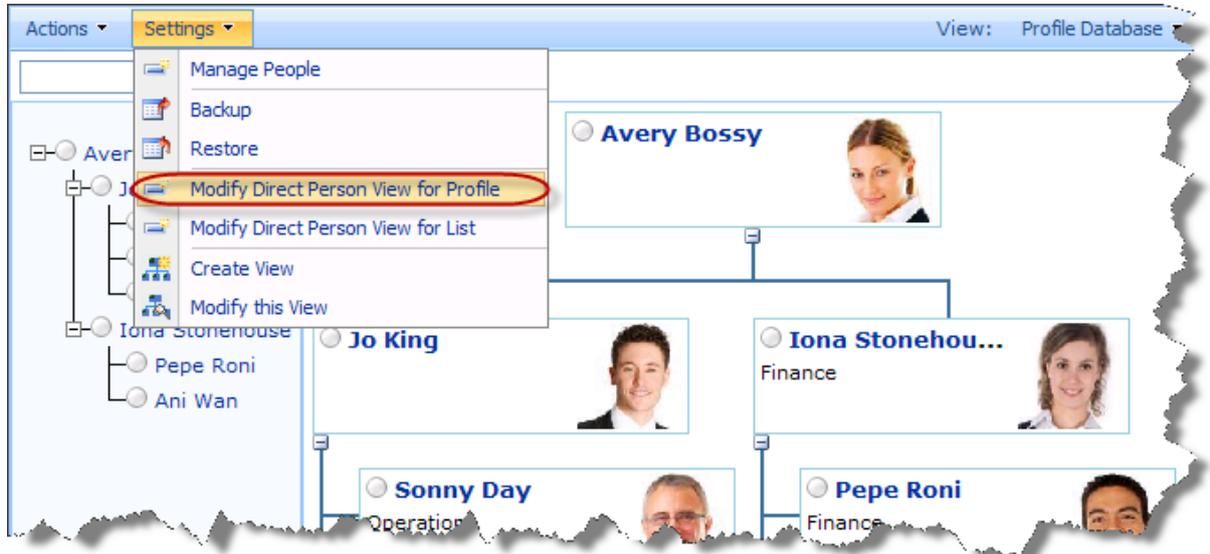


3.8.1 Modify Direct Person View for Profile

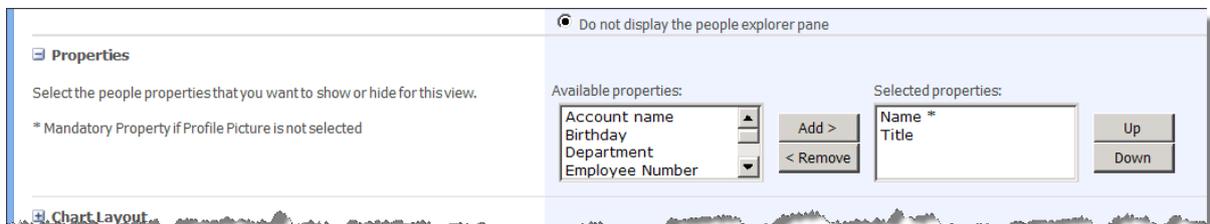
Within the Direct Person View, the user can customise the information presented for that particular profile(s) chart.

To modify the Direct Person view, follow these steps.

1. On 1OrgChart select **Settings > Modify Direct Person View for Profile**



2. Edit and customise any information that you would like to appear within the user profile cards and select **Ok**.



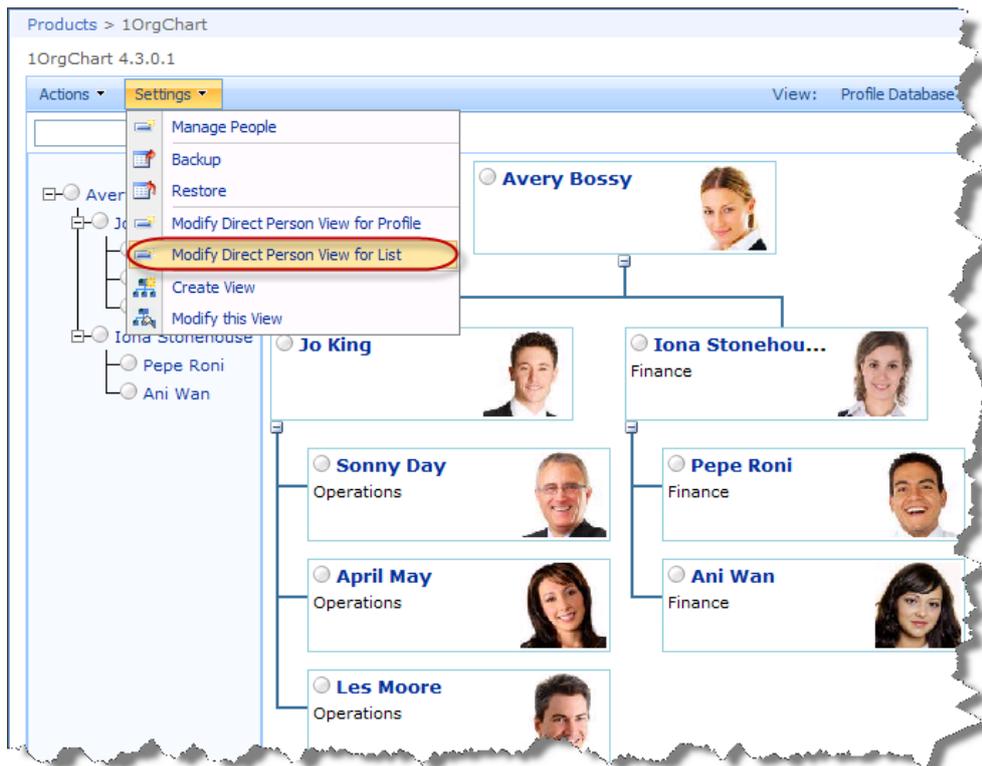
Note: To view a Direct View via the URL using an email address, please refer to section **3.8 Direct Person View**

3.8.2 Modify Direct Person View for Lists

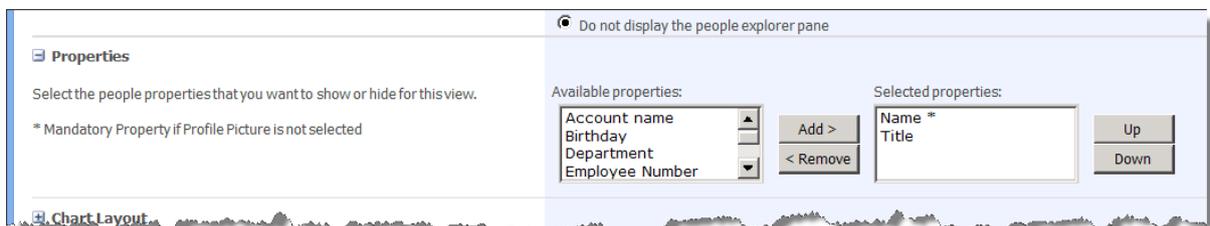
Within the Direct Person View, the user can customise the information presented for that particular profile(s) chart for Custom Lists.

To modify the Direct Person view follow these steps.

1. Ensure that the profiles used are from the **Custom Lists**
2. Select **Settings > Modify Direct Person View for Profile**



3. Edit and customise any information that you would like to appear within the user profile cards and select **Ok**.



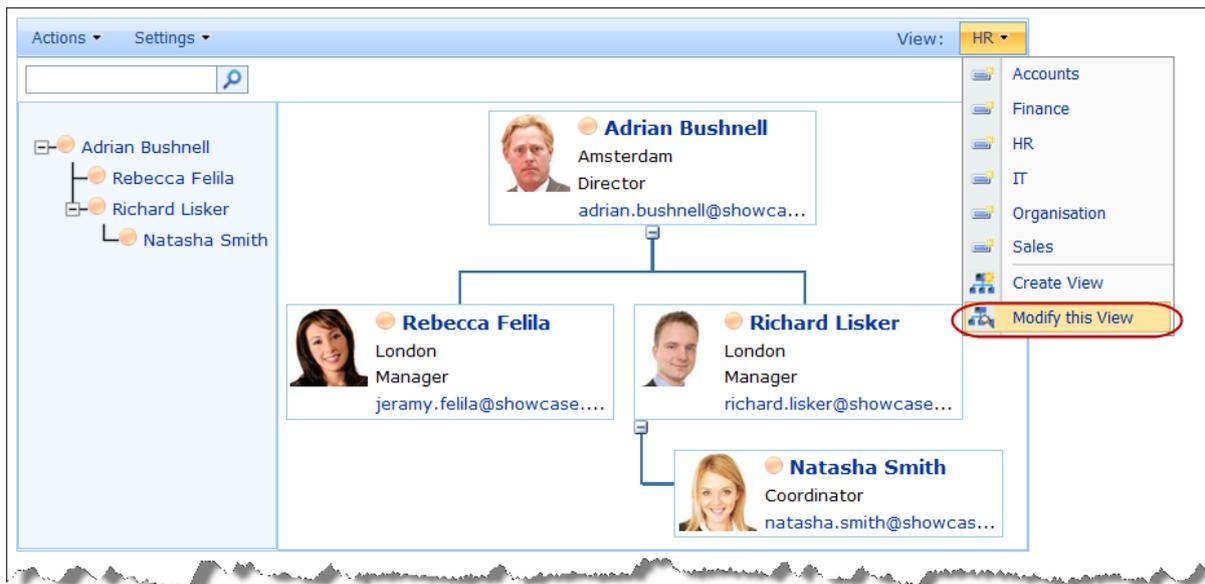
3.9 People Explorer View

The People Explorer view allows the user to easily navigate through the list of profiles, that when selected, generates a separate Chart View related to the chosen user.

3.9.1 Display the people explorer pane

To display the People Explorer view with all users present, follow these steps.

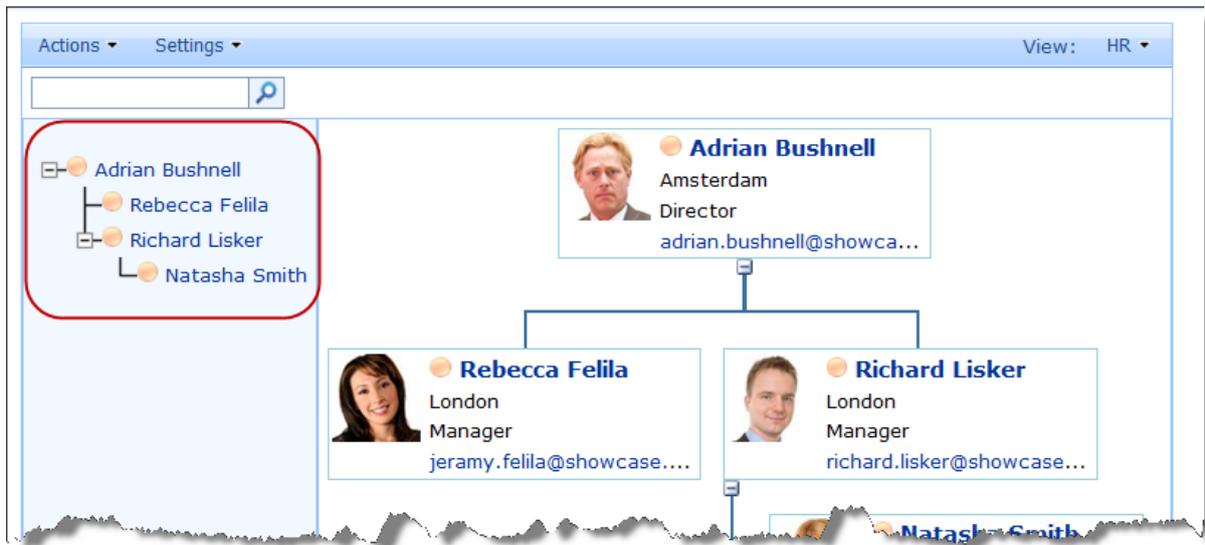
1. Select **Modify this View**



2. Locate the **People Explorer** option



3. Select **Display the people explorer pane**



All users will now appear within the people explorer view.

3.9.2 Display the people explorer from this person

To display the People Explorer View starting with a particular individual, the user name can be specified within the view settings. To specify a user, follow these steps.

1. Select **Modify this View**



2. Locate the **People Explorer** option



3. Select **Display the people explorer from this person.**

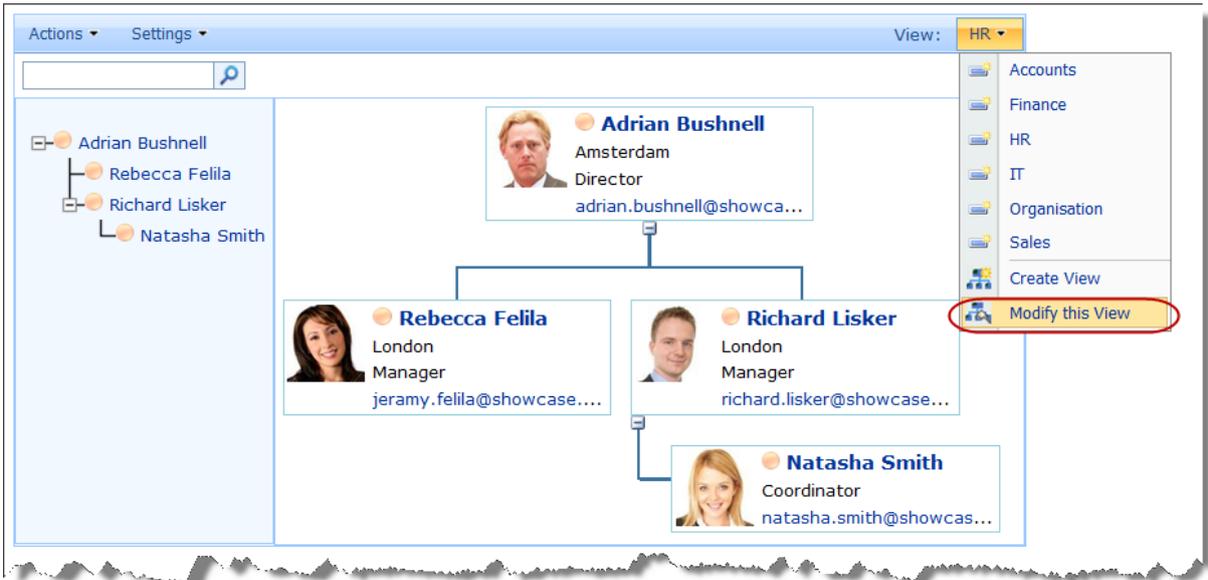


4. Specify the user you wish to appear at the top of the People Explorer view.

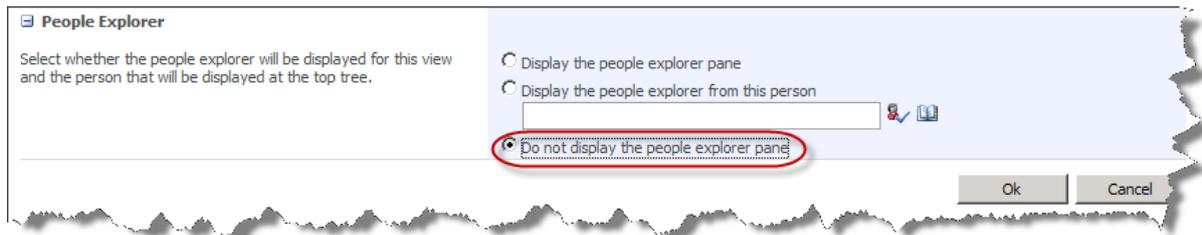
3.9.3 Do not display the People Explorer pane

To display only the chart view without the additional People Explorer navigation on the left, follow these steps.

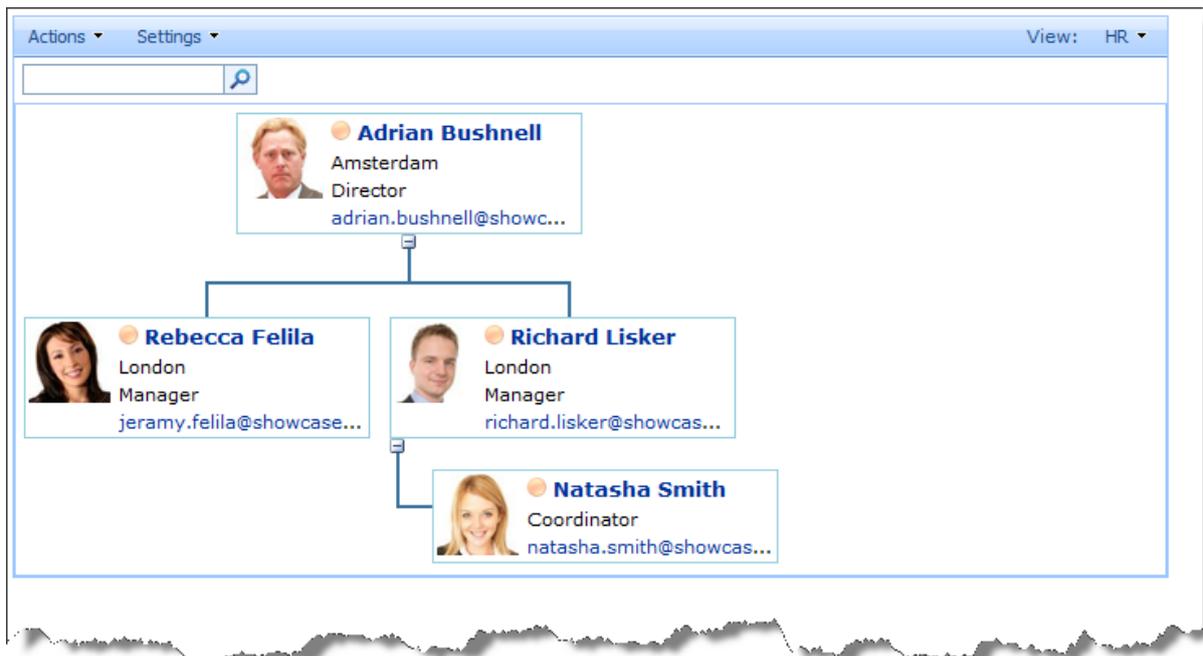
1. Select **Modify this View**



2. Locate the **People Explorer** option



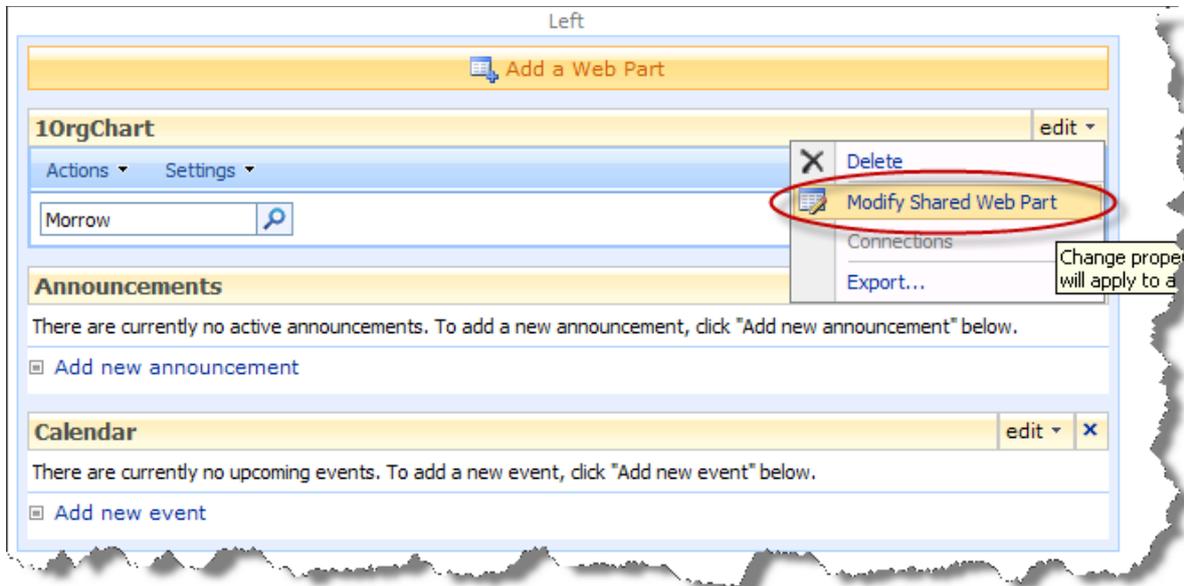
3. Select **Do not display the People Explorer pane**
4. Select **OK**
5. The People Explorer will be hidden for the view.



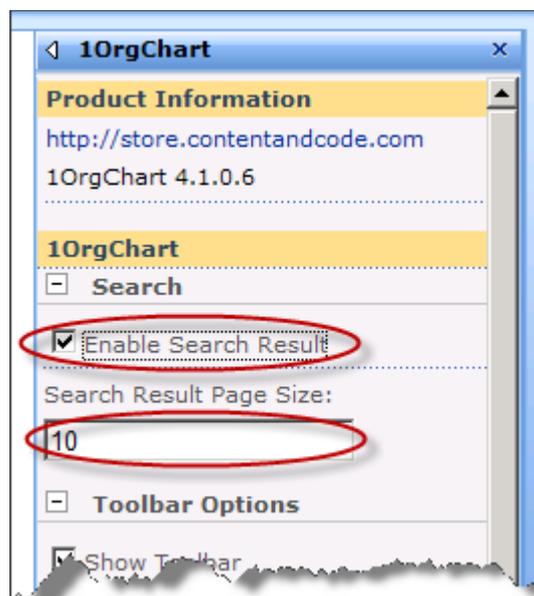
3.10 Search Results

To manage the search feature within 10OrgChart follow these steps.

1. Select **Site Settings > Edit Page > Modify Shared Web Part**

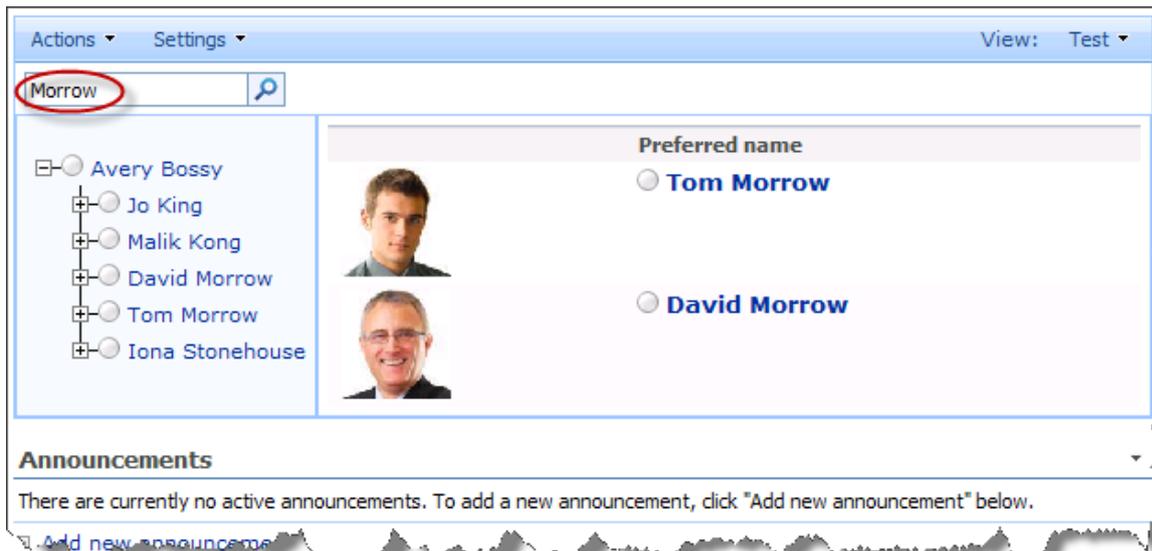


2. Locate the **Search** option and select **Enable Search Result**



3. To edit the results produced per page, enter the desired result amount in the **Search Result Page Size**.

4. To search for users, enter a full, first or last name into the search box.



The screenshot shows a user management interface. At the top, there are tabs for 'Actions' and 'Settings', and a 'View: Test' dropdown. A search box contains the text 'Morrow' and is circled in red. Below the search box is a list of users with expandable icons: Avery Bossy, Jo King, Malik Kong, David Morrow, Tom Morrow, and Iona Stonehouse. To the right of the search results, there are two user profiles. The first profile shows a photo of a man and the text 'Preferred name' followed by a radio button and 'Tom Morrow'. The second profile shows a photo of a man and the text 'Preferred name' followed by a radio button and 'David Morrow'. Below the user list, there is an 'Announcements' section with the text: 'There are currently no active announcements. To add a new announcement, click "Add new announcement" below.' and a link 'Add new announcement'.