



Editor

Manual, Release 2.11

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Multi-Platform

The Editor runs literally in the webbrowser of any device: desktop PC, laptop, tablet, or smartphone. It can run on (not too old versions of) all browsers: IE, Chrome, Firefox, Opera, etc.

Zero Install

There is no need to install any software on your device. The Editor is 100% zero install.

Performance

The Editor runs in the memory of your device. It does not run on a server. The performance is very high, when the following conditions are met: enough memory, fast internet, and folded orgcharts (explained later).

Language switch

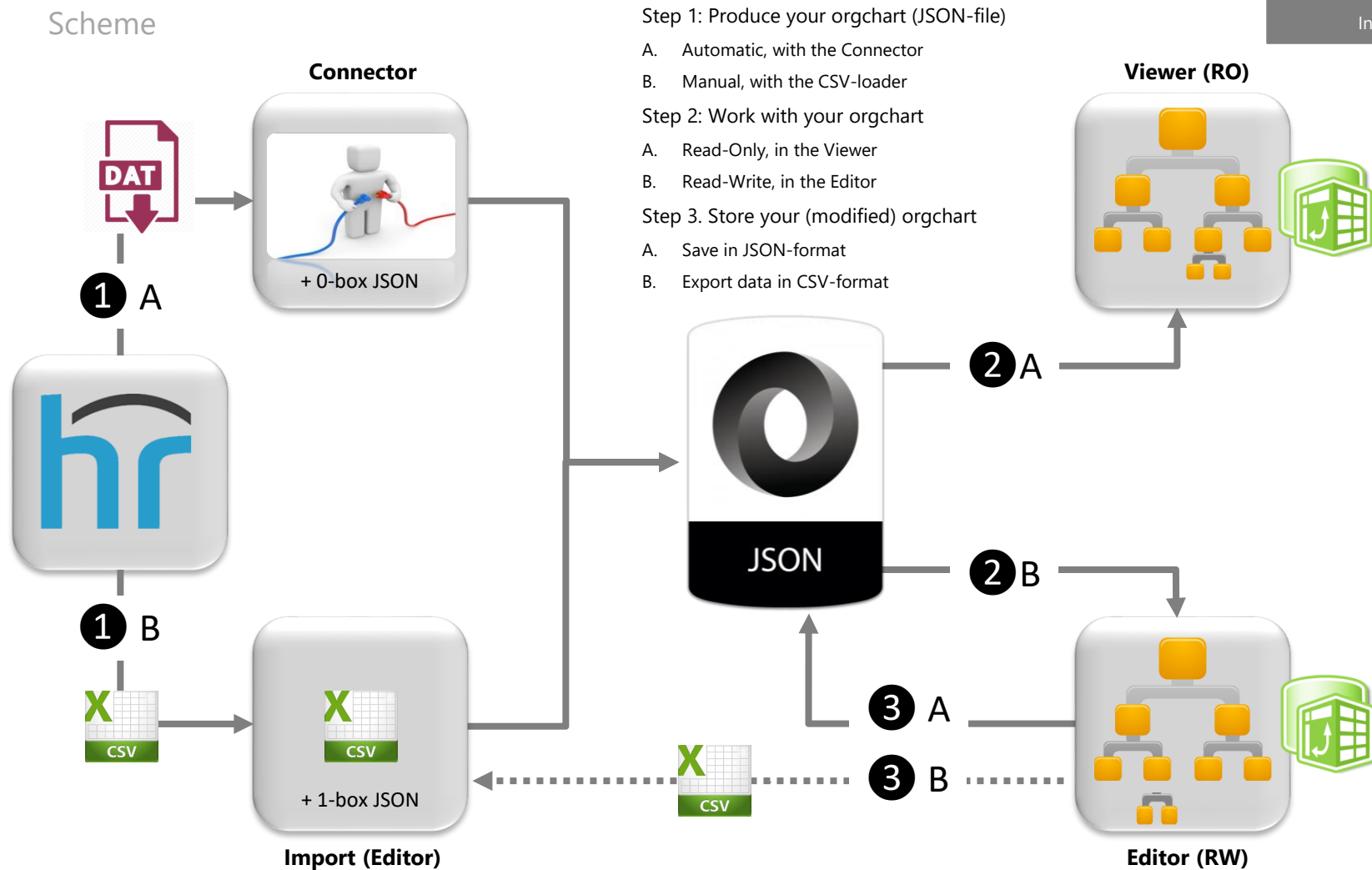
The user can switch from language inside the Editor. Each language is supported. Unicode characters are supported as well. There are five languages standard available: English, German, French, Spanish, and Dutch. But the Administrator can add more languages.

Flexible menu options

The Editor menu is flexible, which means that menu options can be removed by the Administrator. Two users working with the Editor at the same time, may see different options: one has a Metrics icon - the other hasn't, one can choose any orgchart - the other can't. These menu-appearances depend on the Administrator's choices.

Security

Security is another reason why orgcharts appear in a different way. There is security inside and outside the orgchart. An orgchart could be password-protected. But even inside the orgchart differences are possible: one user can see sensitive data – the other can't, one user can see the whole orgchart – the other can see only his own department. Again, these are Administrator's choices.



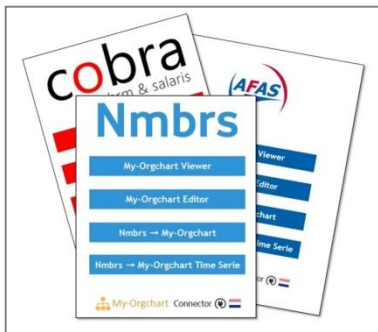
Each orgchart has its own JSON-file. You can load a valid JSON-orgchartfile either in the Viewer or in the Editor. When loaded, the orgchart is returned. The **Viewer** produces a **read-only** (RO) and the **Editor** a **read-write** (RW) orgchart.

JSON-sourcefile: JSON stands for JavaScript Object Notation. The Viewer is written in JavaScript. In order to visualize an orgchart, the Viewer needs a JSON-sourcefiles in a proper format. A proper JSON-file contains a **valid unlock-code**, **parameter-settings**, and **data**.

There are two ways to produce a JSON orgchartfile:

STEP 1A: Connector

The Connector retrieves data from your HR-system and stores them in your JSON template-file. Step 1A is not further explained in this manual.



STEP 1B: CSV-Loader

The CSV-Loader loads data from a CSV-sourcefile and stores them in your JSON one-box-file. Step 1B is not further explained in this manual.



The (super)user has to produce his own CSV-file.

Viewer (STEP 2A) and Editor (STEP 2B)

The Viewer is **Read-Only**, the Editor is **Read-Write**.

None of the Write-functionality is available in the Viewer.

All Read-functionality is available in the Editor

... with the following exceptions:

1. Specific views at the orgchart
 - Sub-charts: select a box and make this box top (Make top) and only visualize the selected box and the boxes below,
 - Context-charts: select a box and visualize this box, the surrounding boxes, and the boxes to the top,
2. Print
 - Fullscreen-button for screen capture software (like FireShot),
3. Orphan-check
 - Checks the orgchart for boxes without parents.

PS: The Editor is not further explained in this manual.

The screenshot displays a software interface for managing organizational data. In the center, a hand-drawn hierarchical diagram shows a root box connected to several child boxes. An orange arrow points from the 'Edit' window to one of the child boxes in the diagram. On the left, a detailed profile for '155 Alison Madigan' is shown, including her photo and contact information. Below this, a list of other employees is visible: 'Alison Madigan', 'Gabe Jackson', and 'Marc Doucet'. On the right, a sidebar contains various icons and a menu with the following options:

- Search...
- Search results...
- Show logging...
- Export to CSV...
- Parameters...
- Help...
- Info...

At the bottom of the sidebar, there are four icons with corresponding labels:

- Details
- Edit
- Delete Box
- Add Box

Functionality

Navigate

Draw

Drag & Drop

Clone

Data Entry

Park

Report

Secure

Track & trace

Viewer

- Orgchart (visualize, navigate, search, ...)
- Reporting (details, pivottable, calculations, ...)
- PDF-print

Editor

- Orgchart (visualize, navigate, search, ...)
- Reporting (details, pivottable, calculations, ...)
- PDF-print

=

Miscellaneous:

- Make-top,
- Context,
- Orphan-check,
- FireShot Print

Editing:

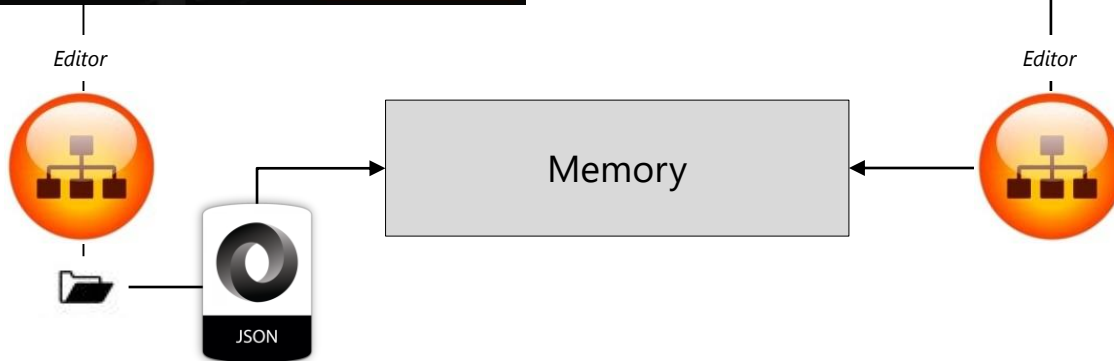
- Scratch Area
- Files:
 - Import (CSV, XML, ...)
 - Export (CSV, JSON)
 - Save
- Boxes/Lines:
 - Make New and Delete
 - Move (Park)
 - Clone
- Fields:
 - Modify (individual and mass)
 - Distract (↑↓ lookup/down)
- Comparing Orgcharts
- Logging

Setting Parameters:

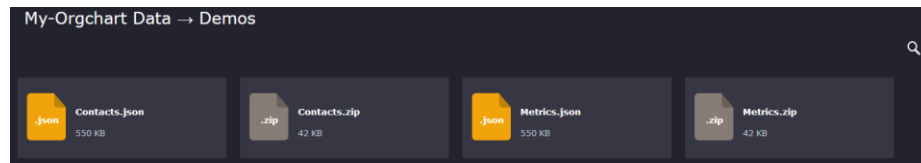
- Define fields
 - Normal fields
 - Deducted fields
 - Model fields
 - Matrix fields
- Soll/Ist-model settings
- Styling settings
- Viewer settings
- File locations
- General settings
- ...

Direct Start: from my-orgchart.com

Choose Editor from my-orgchart.com. An empty Editor will start automatic.

**Embedded Start: From a Portal**

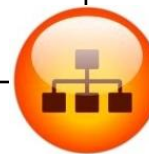
Choose your orgchart. The Editor – JSON-file combination will start automatic.



Portal



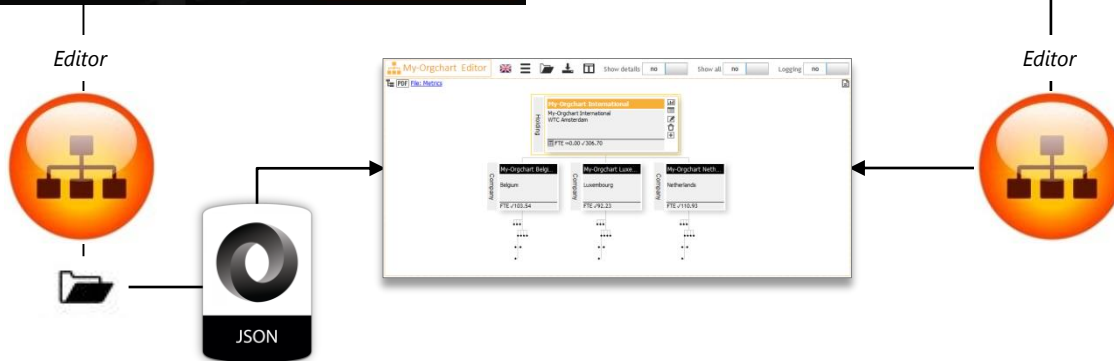
Editor



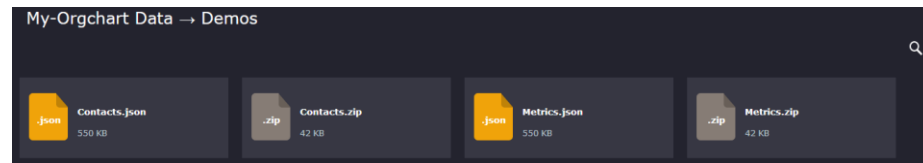
Memory

Direct Start: from my-orgchart.com

Choose Editor from my-orgchart.com. An empty Editor will start automatic.

**Embedded Start: From a Portal**

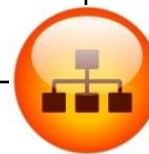
Choose your orgchart. The Editor – JSON-file combination will start automatic.

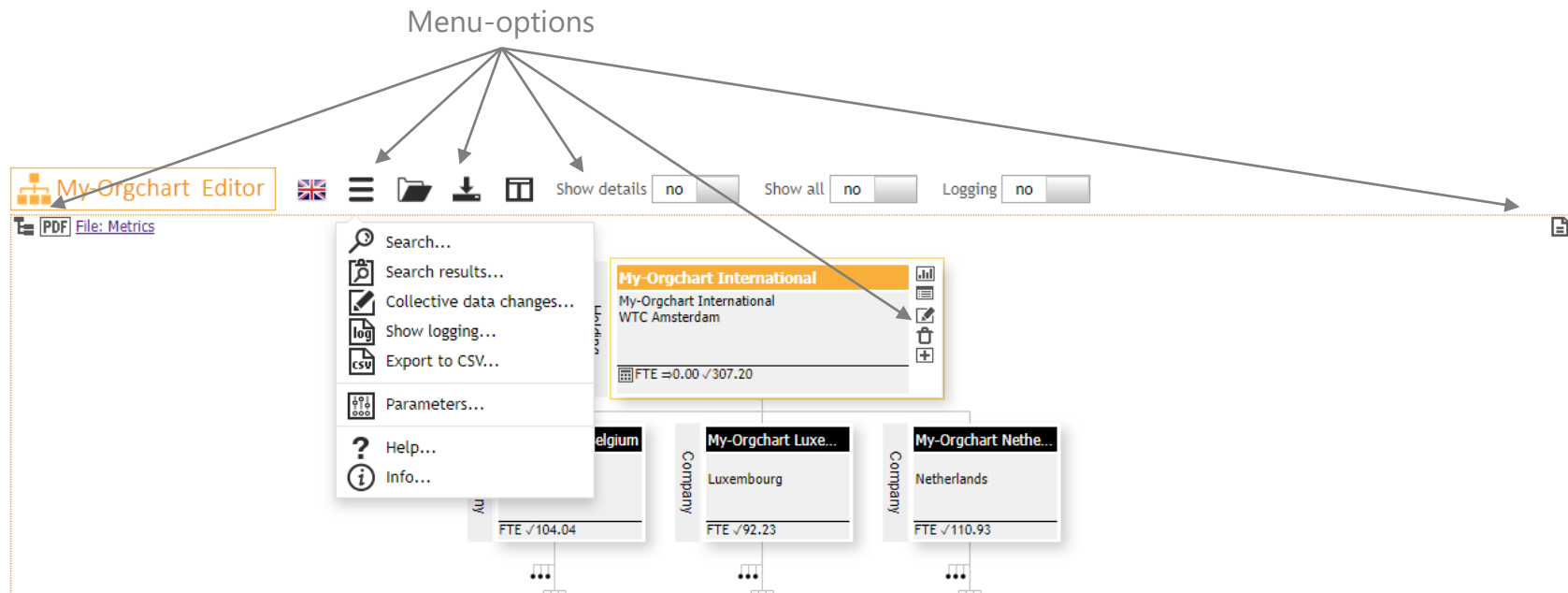


Portal



Editor



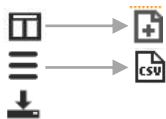


After loading the Editor and the JSON-file, a folded orgchart will appear with **multiple menu-options at several locations**. From left to right:

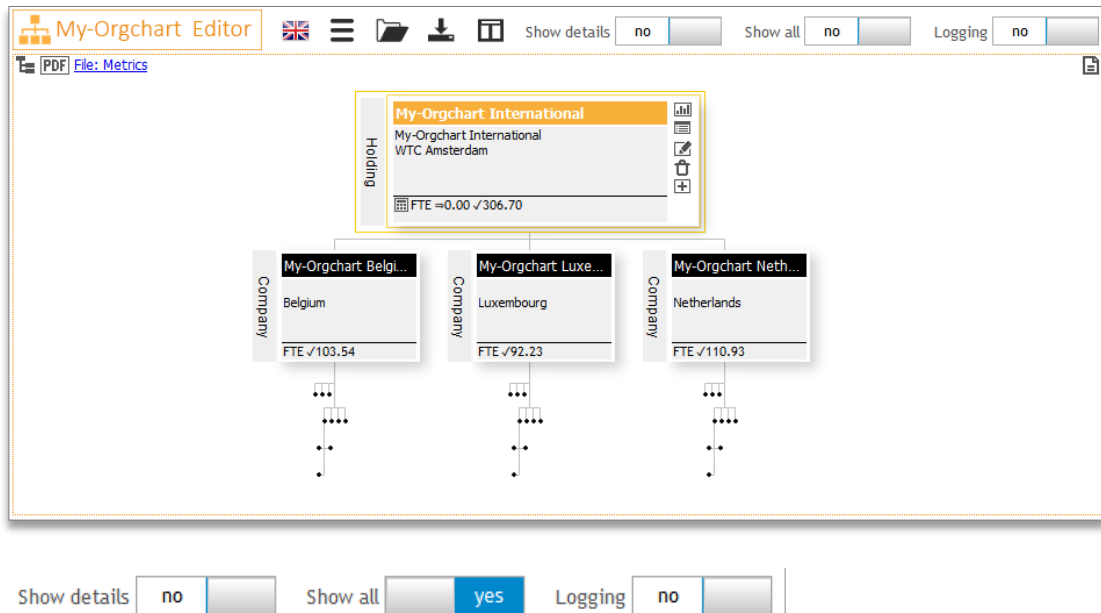
- Orgchart Area (top left): TreeView, PDF-print, and Filename.
- Top Area – Main Menu: Search, Search results, Collective data changes, Show logging, Export to CSV, Parameter Menu, Help, and Info.
- Top Area – Other Options: Language, Open File, Save, and Scratch Area
- Top Area - Switches (Show details, Show all, and Logging).
- Box Menu: Metrics, Details, Edit, Delete, and Add.
- Orgchart Area (top right): Compare.

Top Menu:

- Select language
- Create Scratch Area (P)
- JSON Files:
 - Import (CSV format)
 - Export (CSV format)
 - Save (JSON format)

**Box Menu:**

- Boxes / Chains:
 - Add Box, Delete Box
 - Move (Park)
 - Clone
- Field Values
 - Modify (tem and bulk)
 - Distract (from box above or below)
- Compare Orgcharts
- Logging

**Selector Menu (no/yes):**

- Show details: No = Boxes are in dot format | Yes = Boxes are in default format
- Show all: No = Many boxes are invisible | Yes = All boxes are visible
- Logging: No = Logging is off | Yes = Logging - on



1

Top Menu →	Language	Main Menu	Open File	Save File	Open Scratch Area	On/Off switches
Box Menu items	Language	Main Menu	Orgchart Area	Save Menu	Scratch Area	On/Off switches
• Metrics	• English	• Search	• Tree View	• Security	• Tree View	• Show Details
• Details	• Nederlands	• Show logging	• PDF Print	• File Extension	• CSV Import	• Show All
• Edit	• Deutsch	• Parameters →	Parameter Menu	• Type		• Logging
• Box (+-)	• Français	• Export to CSV	• Field Definitions			
• Box Add	• Español		• Layout			
	• ...		• Planning			
Planning Menu			• Miscellaneous			
• Miscellaneous			• Interfaces			
			• Viewer			

The 1st step is to open an **1-Box** or an **n-Box** (JSON) file.

- **1-Box** contains one fake record that has to be deleted. The real records have to be imported (with a CSV-file by the user).
- **n-Box** contains already the real records (automatic import by the Connector).

Next: Menu's and Submenu's appear on several places.

Orgchart Area

- Environment for the drawn orgcharts "boxes connected through lines"
- Contains the Tree View

The screenshot shows the 'My-Orgchart Editor' interface. The top toolbar includes a PDF icon, a 'File: Metrics' dropdown, and buttons for 'Show details' (set to 'no'), 'Show all' (set to 'no'), and 'Logging' (set to 'no'). The main workspace is divided into two sections. The left section, labeled 'Orgchart Area', contains a grid of employee cards. Each card displays a photo, name, title, and FTE value. A 'Sales Representative' box is highlighted at the top. The right section, labeled 'Scratch Area', contains a 'Bernice Jacobson' box. The top toolbar also includes a 'Show details' button and a 'Show all' button.

Scratch Area

- Parking Place to be used by the user and the system (for storing clones and orphans)
- Contains the CSV Loader

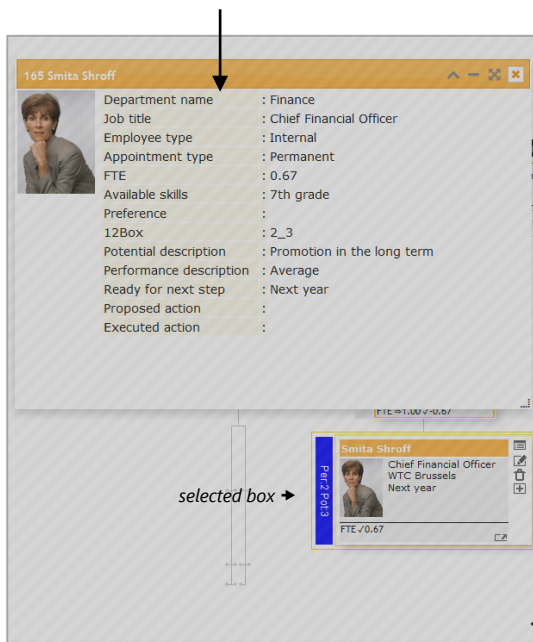
Tree View (Pop Up Window)

- Character-based orgchart
- Press icon (top left)

The screenshot shows a 'Tree View (Pop Up Window)' displaying a hierarchical orgchart structure. The tree starts with 'My-Orgchart International' and branches into 'My-Orgchart Belgium' and 'My-Orgchart Luxembourg'. 'My-Orgchart Luxembourg' further branches into 'Finance', 'Human Resources', 'Facility management' (highlighted), 'R&D', 'Customization', 'Consultancy', 'Implementation', 'CEO', 'Legal', and 'My-Orgchart Netherlands'. The 'Facility management' node is expanded, showing a sub-tree with 'L3000 Luxembourg WTC Luxembourg' and 'Facility Mana'.

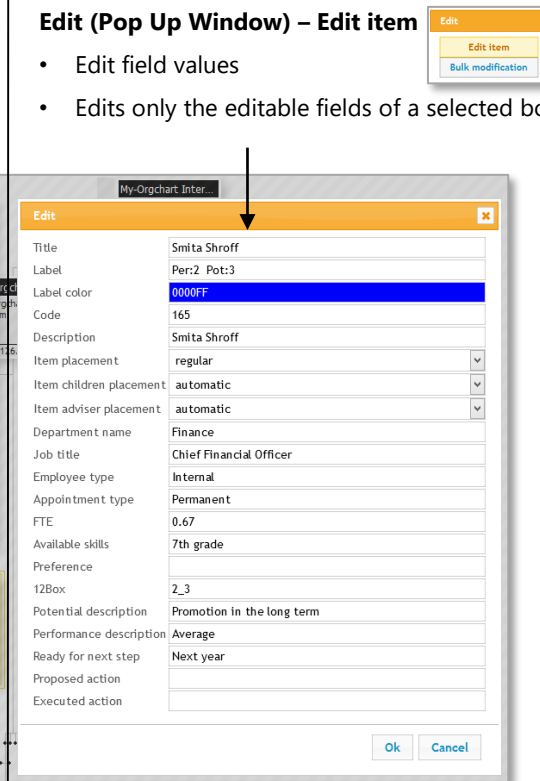
Details (Pop Up Window)

- Additional fields with their values
- Only available for a selected box



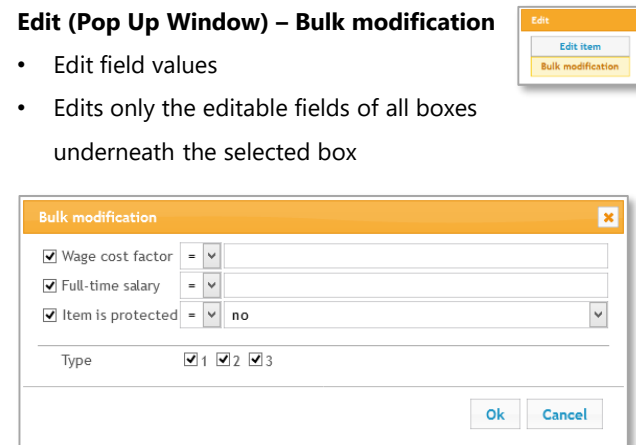
Edit (Pop Up Window) – Edit item

- Edit field values
- Edits only the editable fields of a selected box

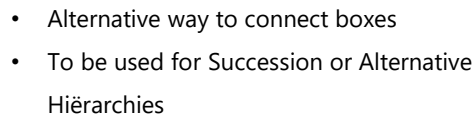
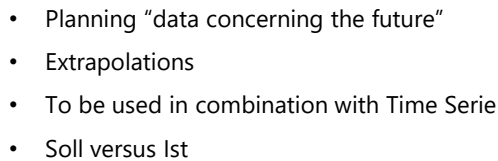


Edit (Pop Up Window) – Bulk modification

- Edit field values
- Edits only the editable fields of all boxes underneath the selected box



- Top boxes contain "time" (years, months, periods)
- Time boxes are pre-defined by the system
- Choose : (12) Months or (13) Periods



Metrics (Pop Up Window)



Table

- Pivot Table analysis
- Table format

Graph

- Pivot Table analysis
- Graph format

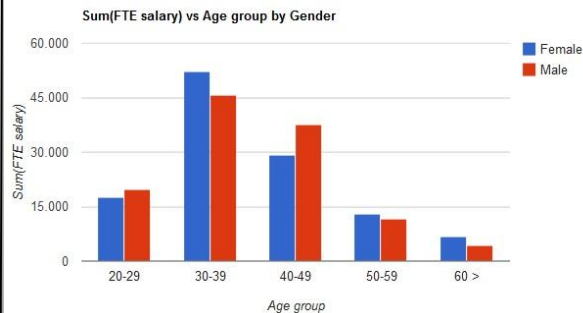
Heathmap

- Pivot Table analysis
- Heathmap format

HOLDING My-Orgchart International

Table: FTE, Count: Age group, Gender: Female, Male, Total

Age group	Female	Male	Total
20-29	22	25	47
30-39	74	60	134
40-49	67	59	126
50-59	46	38	84
60 >	14	19	33
Total	223	201	424



BELGIE My-Orgchart Belgium

Table Heatmap: FTE, Working hours group, Years of service, Gender: Female, Male, Total

Age group	Female	Male	Total
20-29	5	9	14
30-39	11	15	26
40-49	10	17	27
50-59	10	11	21
60 >	3	7	10
Total	39	69	108

LUXEMBOURG My-Orgchart Luxembourg

Table Heatmap: FTE, Working hours group, Years of service, Gender: Female, Male, Total

Age group	Female	Male	Total
20-29	9	10	19
30-39	15	15	30
40-49	15	15	30
50-59	8	6	14
60 >	3	2	5
Total	50	48	98

Parameters (Submenu)

- Parameter settings

The screenshot shows a 'Parameters' dialog box with a close button (X) in the top right corner. The dialog is organized into several sections, each with a label and a set of buttons or options:

- Standaard item:** Type 1, Type 2, Type 3
- Geselecteerd item:** Type 1, Type 2, Type 3
- Details:** Type 1, Type 2, Type 3
- Opmaak:** Velden, Randen
- Conditionele opmaak:** Velden, Randen
- Wijzigen:** Velden, Waardenlijsten
- Berekende velden:** Type 1, Type 2, Type 3
- Samengestelde velden:** Type 1, Type 2, Type 3
- Tabelvelden:** Type 1, Type 2, Type 3
- Planning:** Configureren, Analyse
- Afgeleide velden:** (gear icon)
- Kengetallen:** (gear icon)
- Nivellering:** (gear icon)
- Opvolging:** (gear icon)
- Groepen:** (gear icon)
- Selectors:** (gear icon)
- Diagram:** (gear icon)
- Interface:** (gear icon)
- Bestandstoelichting:** (gear icon)
- Viewer:** (gear icon)

Loading JSON-files:

All specifications in relation to your orgchart, are stored in one, single JSON-file. JSON, the filetype name, stands for **JavaScript Object Notation**. A "My-Orgchart" JSON-file should contain 3 things: a valid unlock-code, the proper data, and the proper parameter-settings.

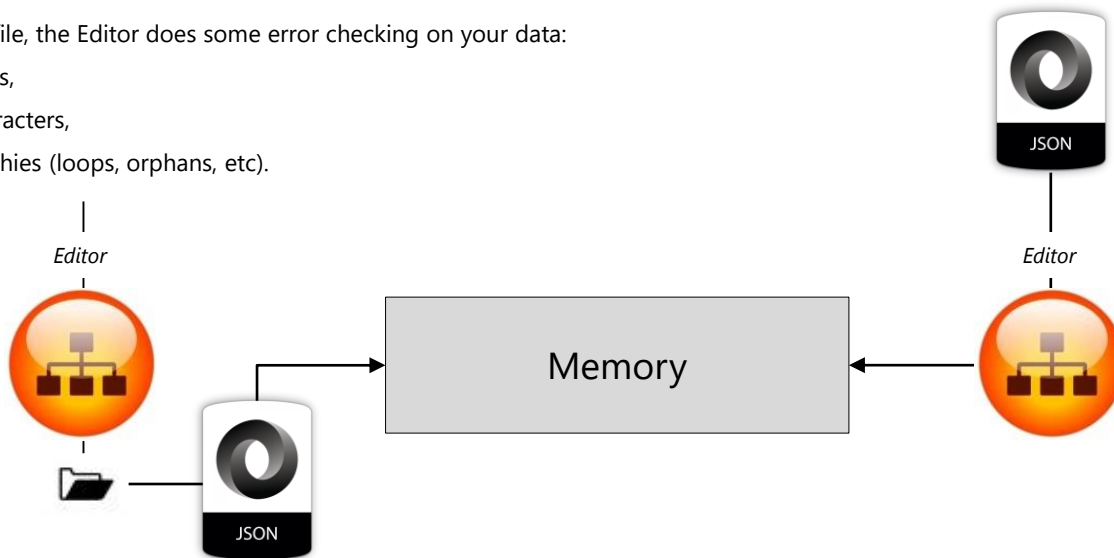
1. Without the valid unlock-code: the system does not work at all. Repair: contact OrgPlan for a valid code.
2. Without the proper data: a minimal orgchart could come up, if all validation checks are passed. Repair: change and/or add data. *
3. Without the proper settings: an orgchart will come up, but probably not in the layout that you prefer. Repair: go to the Parameter-menu to change your settings.

** The biggest challenge is to have error-free data!*

Validation:

Before loading your JSON-file, the Editor does some error checking on your data:

- check on invalid filetypes,
- check on forbidden characters,
- check on broken hierarchies (loops, orphans, etc).



0- and 1-Box JSON's

Data

There are several ways to feed your orgchart with data:

1. Using the Connector.

Systems retrieves data from the HR-system and stores it in a 0-Box JSON.

2. Import from CSV.

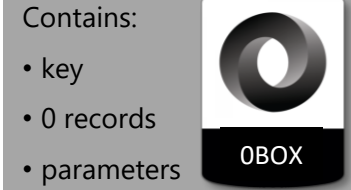
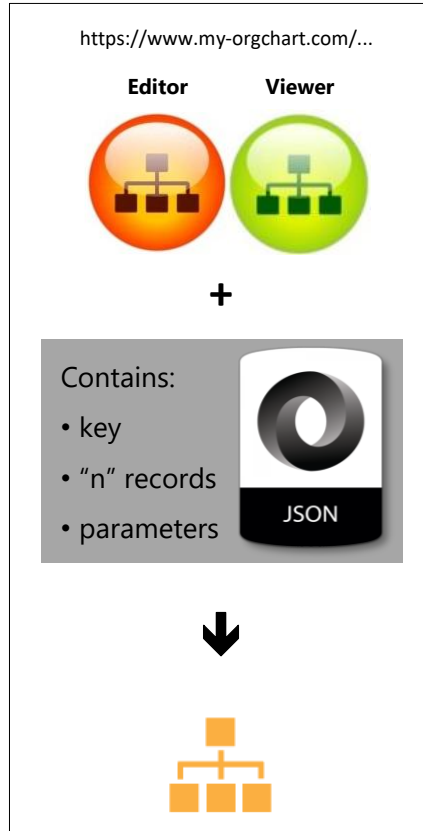
Imports data from one or more CSV-files and stores it in a 1-Box JSON.

3. Manually.

Enter data by hand in a 1-Box JSON.

NB:

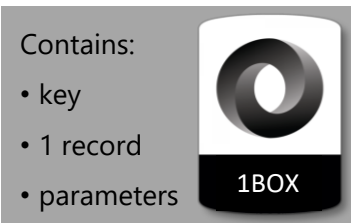
OrgPlan provides 0-Box and 1-Box JSON's.

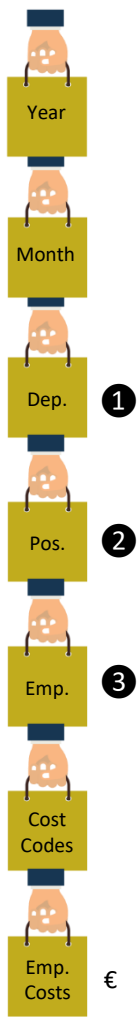


2-Step Orgchart

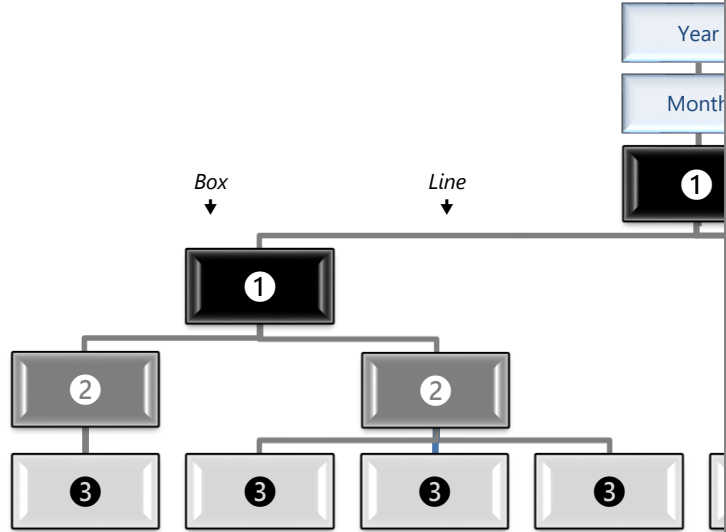


Multi-Step Orgchart





Reporting Relationship

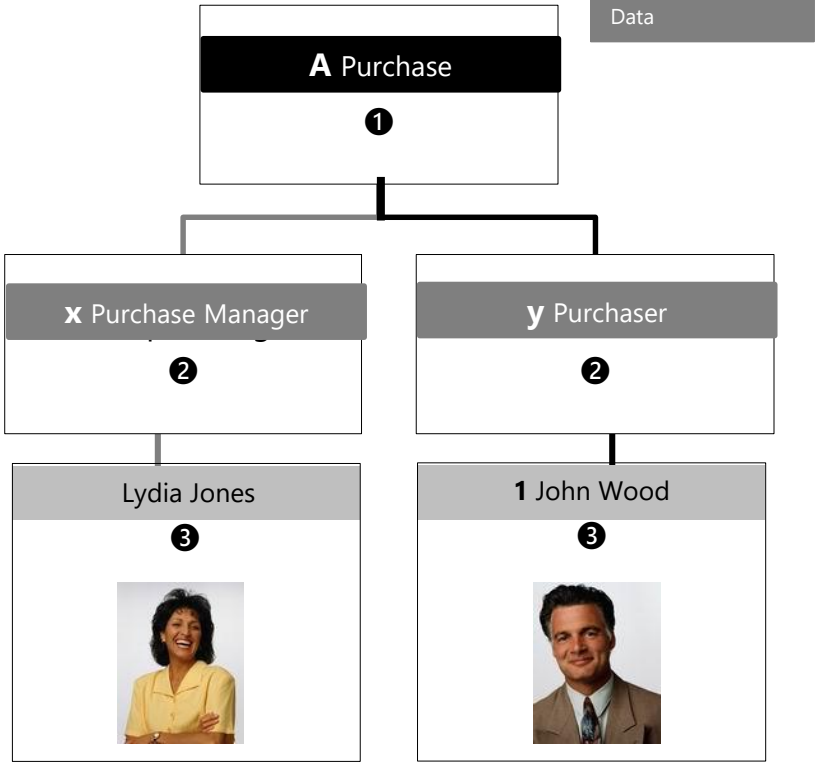


Orgcharts consist of boxes and lines. A box is a record (a row in an Excel-sheet). A line is the result of the "Reporting Relationship", defined by the id/parent-combination in the data":

- 1. id** The unique identification of the record (or box).
- 2. parent** The id of the record where to report to.

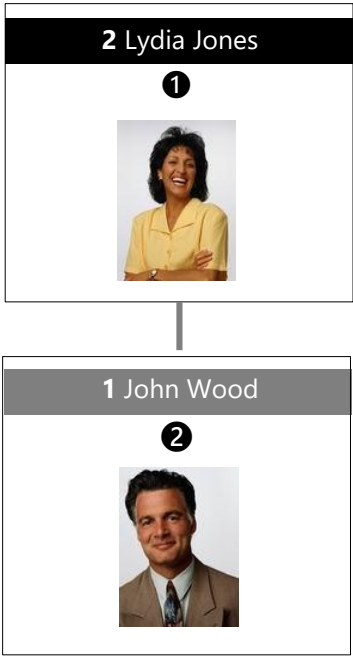
NB:

- The id mentioned as parent must be in the id-column.
- Avoid long id's. Avoid strange characters (#,&,@, etc.). Beware of typing errors.
- Record(s) with empty parent(s), will become a top in the orgchart.



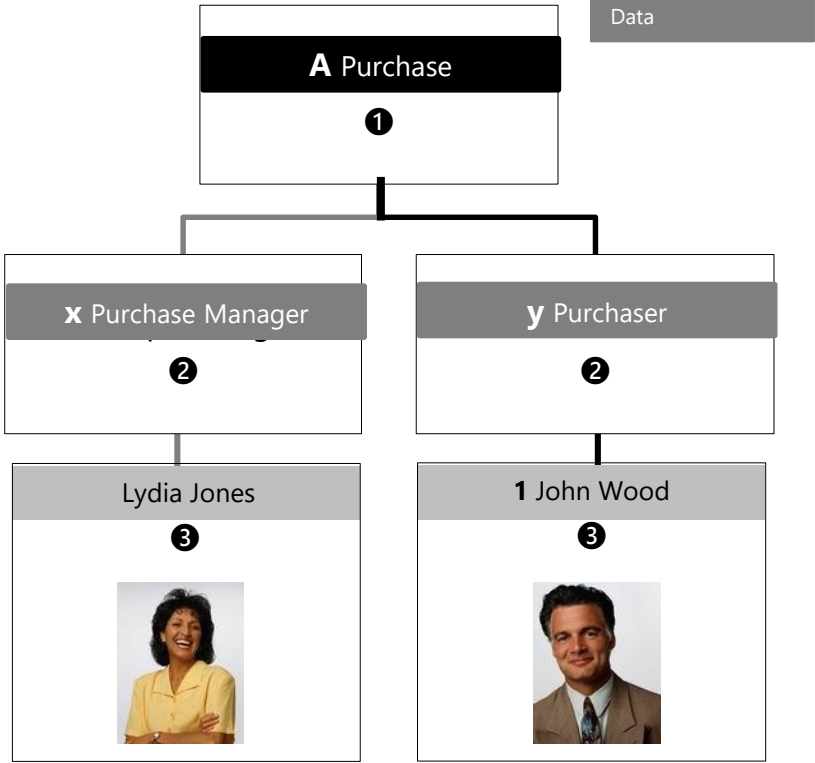
id	parent	type	description	fields	matrixfields
A		1	Purchase	...	...
y	A	2	Purchaser	...	...
1	y	3	John Wood	...	...

Reporting Relationship



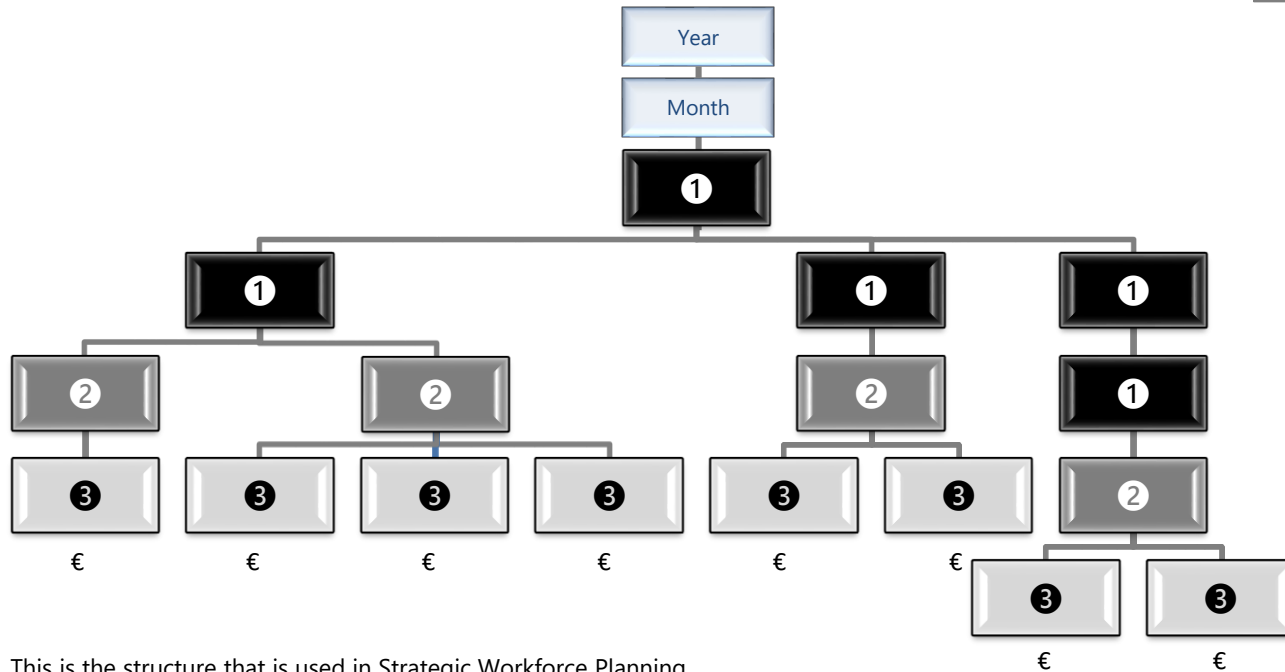
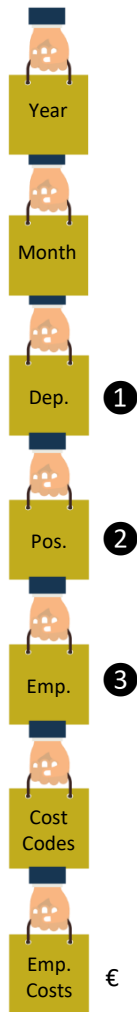
- The system is indifferent for what the user puts in a box.
- It could be employees, positons, departments, etc. Everything is okay.
- The only condition is that the Reporting Relationship should be correct.

id	parent	type	description	fields	matrixfields
2		1	Lydia Jones	...	...
1	2	2	John Wood	...	...



id	parent	type	description	fields	matrixfields
A		1	Purchase	...	...
y	A	2	Purchaser	...	...
1	y	3	John Wood	...	...

SWP Structure



- This is the structure that is used in Strategic Workforce Planning.
- The top layer consists of a time-axis (year-month or year-period).
- The lowest layer consists of employee costs.
- This structure can either be used with positions (HR) or with costcenters (FIN).
- An employee could either appear on multiple positions or multiple costcenters.

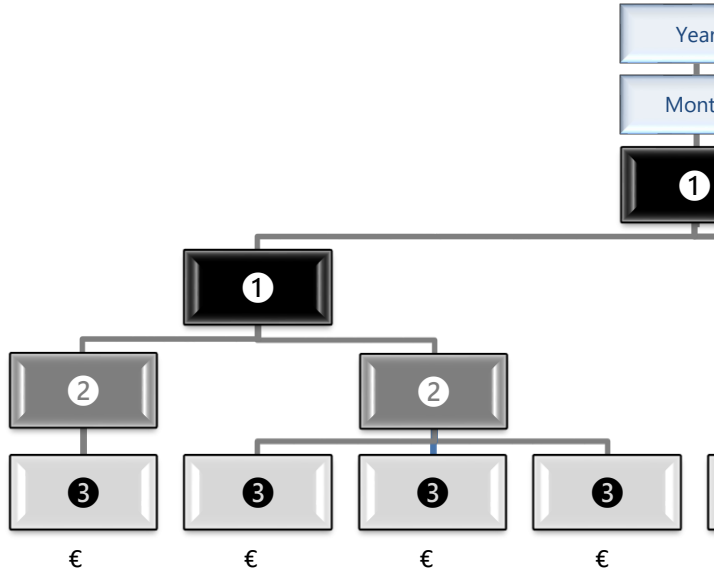
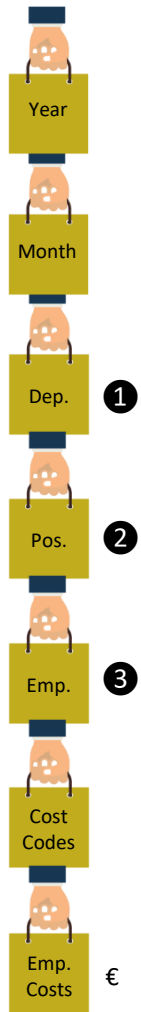
① = department
 ① = department
 ② = position
 ③ = position-employee



① = department
 ① = department
 ② = costcenter
 ③ = costcenter-employee

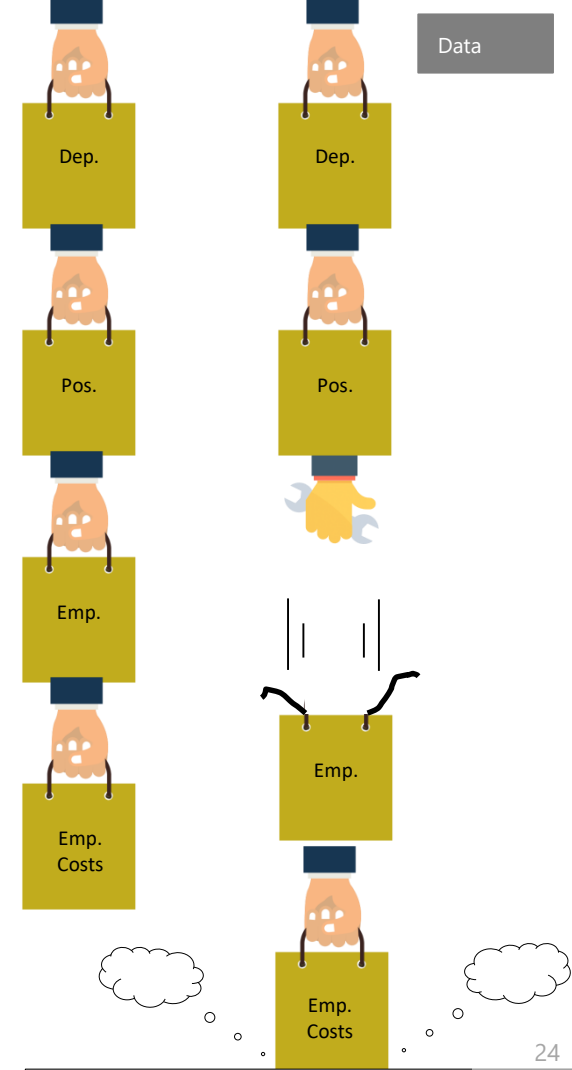


Orphans



Broken Reporting Relationship

- An Orphan appears in the orgchart when a Reporting Relationship is broken (e.g. a manager leaves the company).
- One Orphan could lead to multiple Orphans, as everything below the box with the broken relation becomes Orphan as well.
- Since headcounts and aggregations won't match anymore, Orphans need to be repaired.

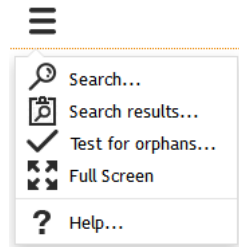


Test on Orphans

- An Orphan is a box (not always an employee) without a (good) Parent.
- Orphans can be located with the Orphan-test.
- Click on [Test for orphans] in the Ribbon Dropdown Menu.

Difference in the sourcefile between an Orphan and a Multi-Top

- Orphan - A box with a wrong parent code.
- Multi-top - Multiple hierarchies.



ID	Parent
A	
x	A
2	x

ID	Parent
B	
y	B
3	y

A and B are both Tops (Multi-top).

ID	Parent
Pete Jones	
Kenny Smith	Pete Jones
Jack Johnson	Kenn Smith

Jack Johnson is an Orphan, because Kenny is misspelled.

NB:

- Orphan boxes are placed in the scratch area, after importing a CSV-file. From there on, the user can place them on their proper positions.
- The user could also decide to fix the reporting relationship in the HR/Payroll-system, and to do a new import.
- When there are too many orphans, the system only generates an error message without showing all orphan boxes.

Type:

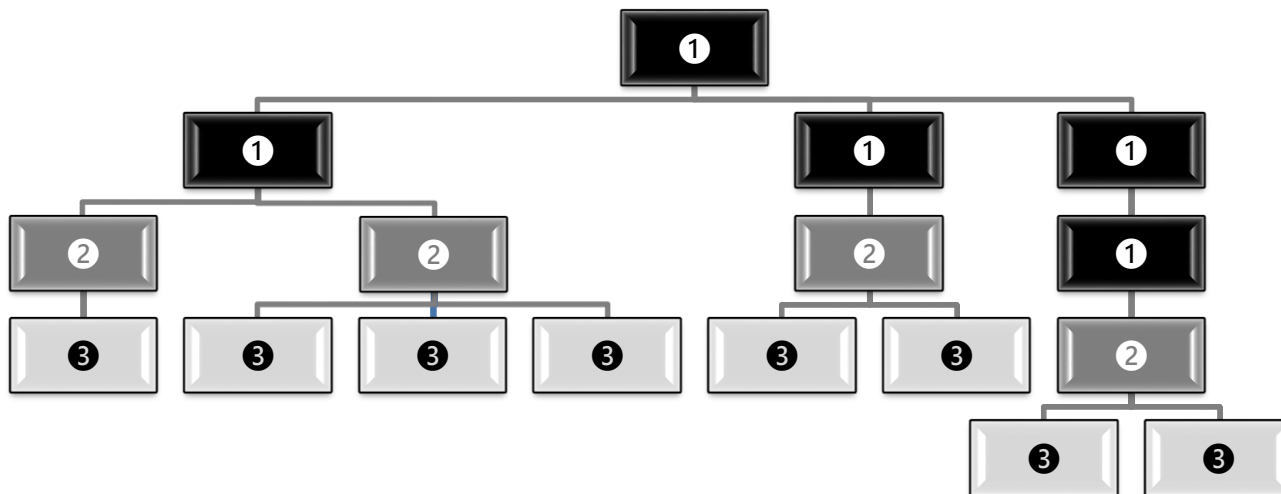
Type ①

Type ②

Type ③

Common fields strongly advised, but not obliged:

type, code, description, title, label, item placement, item children placement, and item adviser placement.



Item Placement:

regular
 assistant
 adviser
 sub assistant
 sub adviser
 general partner
 limited partner
 adviser partner

Item Children Placement:

automatic
 vertical
 horizontal
 matrix

Item Adviser Placement:

automatic
 left
 right

- **Type.** Different box-types (1, 2 or 3) allows the user to define different box –layouts (colours, fields, calculations, etc.).
- **Code.** The code used in the HR/Payroll-system. For reference purposes only.
- **Description.** A word to recognize the box.
- **Title.** A short text that will be placed in the heading of the box.
- **Label.** A short text that will be placed at the left front of the box. **Label color.** In addition the label color can be set.
- **Item Placement.** The way the system has to position a box in relation to its parent (e.g. line, staf, etc.).
- **Item Children Placement.** The way the system has to build the orgchart (vertical or horizontal).
- **Item Adviser Placement.** The way the system has to place advisers (left or right).



Matrixfield: benefits

Component1 = € 5.000

Component2 = € 1.500

Component3 = € 1.000



Matrixfield: benefits

Component1 = € 3.000

Component2 = € 1.000

	name	benefits
	Lydia Jones	Component1 € 5.000 Component2 € 1.500 Component3 € 1.000
	John Wood	Component1 € 3.000 Component2 € 1.000

NB:

- a normal field has one value
- a matrixfield has multiple values (amount varies for each box)

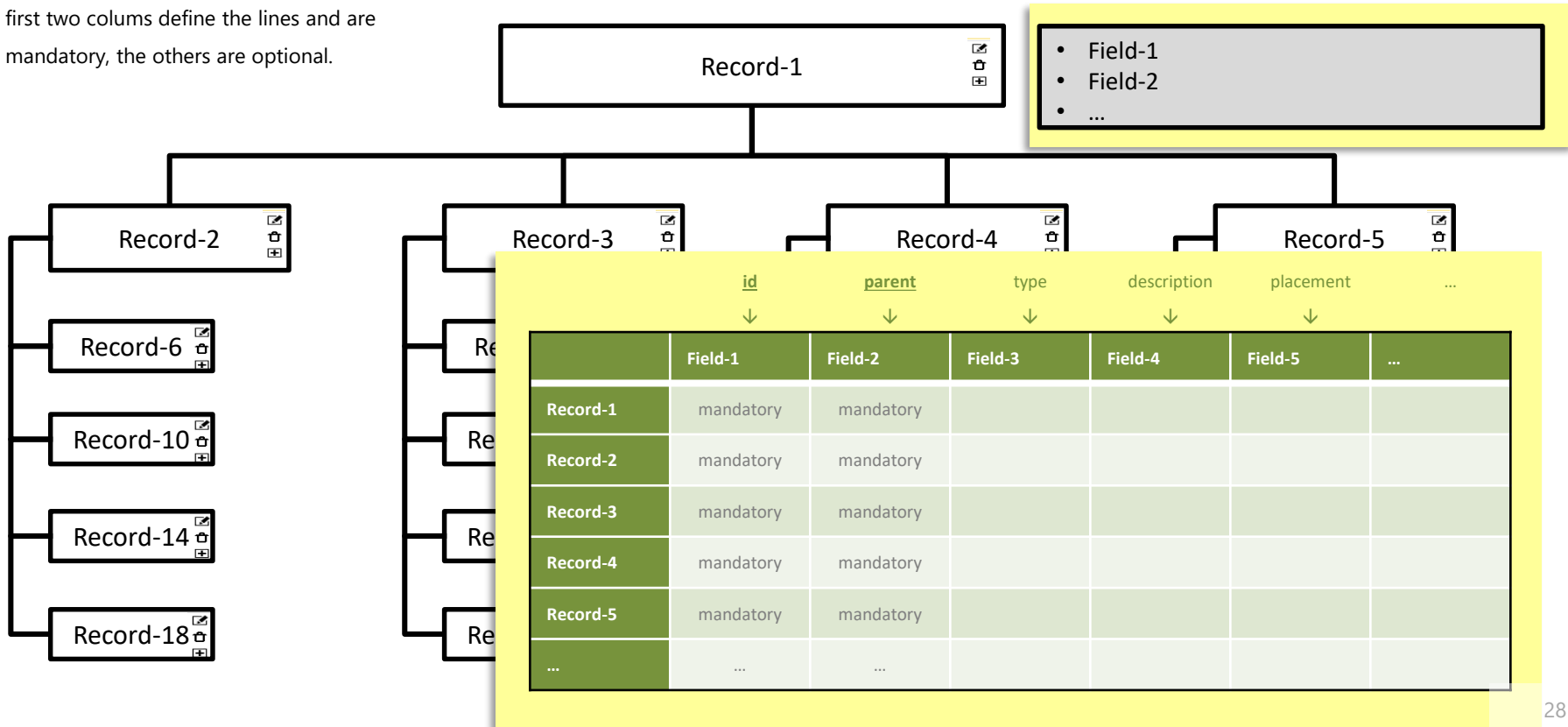




Import and Export: import data from CSV to JSON, or export data from JSON to CSV.

Conversion

- a CSV-row becomes a JSON-box, and a CSV-column becomes a JSON-field.
- first two columns define the lines and are mandatory, the others are optional.



- Field-1
- Field-2
- ...

<u>id</u>	<u>parent</u>	type	description	placement	...
Record-1	mandatory	mandatory			
Record-2	mandatory	mandatory			
Record-3	mandatory	mandatory			
Record-4	mandatory	mandatory			
Record-5	mandatory	mandatory			
...	...	...			

Modify

Import | Export

Modify: in CSV or in JSON

- you can modify the data in CSV first and export to JSON, or you can modify in JSON.

Modify in JSON

- each box has a box-menu with all modify options.



Edit data



Delete Box



Add Box (empty or clone)

Record-1

- Field-1
- Field-2
- ...

Record-2

Record-6

Record-10

Record-14

Record-18

Record-3

Record-4

Record-5

<u>id</u>	<u>parent</u>	type	description	placement	...
↓	↓	↓	↓	↓	
Record-1	mandatory	mandatory			
Record-2	mandatory	mandatory			
Record-3	mandatory	mandatory			
Record-4	mandatory	mandatory			
Record-5	mandatory	mandatory			
...	...	...			

Language switch

You can switch your language in the Ribbon Menu by clicking on the flag.

What is translated?

Translated are: fieldnames, fieldvalues and the user-interface (menu-options, error messages, etc.). These items are all translated in five standard languages : English, German, French, Spanish, and Dutch. The translated fields are the hierarchy fields, box fields, common fields, and example fields.

Accessible

All translations are stored in a simple Excel-file. This file is not encrypted, because there is no secret information in there. We advise you to store this file in an accessible place, like: Google Drive, One Drive, etc. This has two advantages: 1.) the system can reach it, and 2.) the user can reach it for adding extra translations.

Extra translations

The user might decide to add some additional translations for new fields (fieldnames and -values) and new languages. There is no limit on additional translations. Unicode characters are supported.

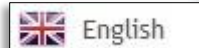
Universal data

The Translation table can also be used for making the data universal. If we look to our example at the right. In English the system reports "Gender - Female" and in German "Geschlecht - Weiblich". Suppose this org-chart receives its data from two HR-systems: an English one using "M" and "F", and a German one using "M" and "W" as values for gender. By defining the right translations, the system can be made universal in its values for this field.



Japanese is added >

Orgchart View



185 Anna Gorbach

Last name	: Gorbach
First name	: Anna
Gender	: Female
Job title	: Manager HR
Employee type	: Internal
Country	: Belgium
Location	: WTC Brussels
Google Maps	: https://goo.gl/maps/jMwhP
E-mail	: gorbach@my-orgchart.com
Mobile phone number	: +32(6)16753232
Work phone number	: +32(33)8881844

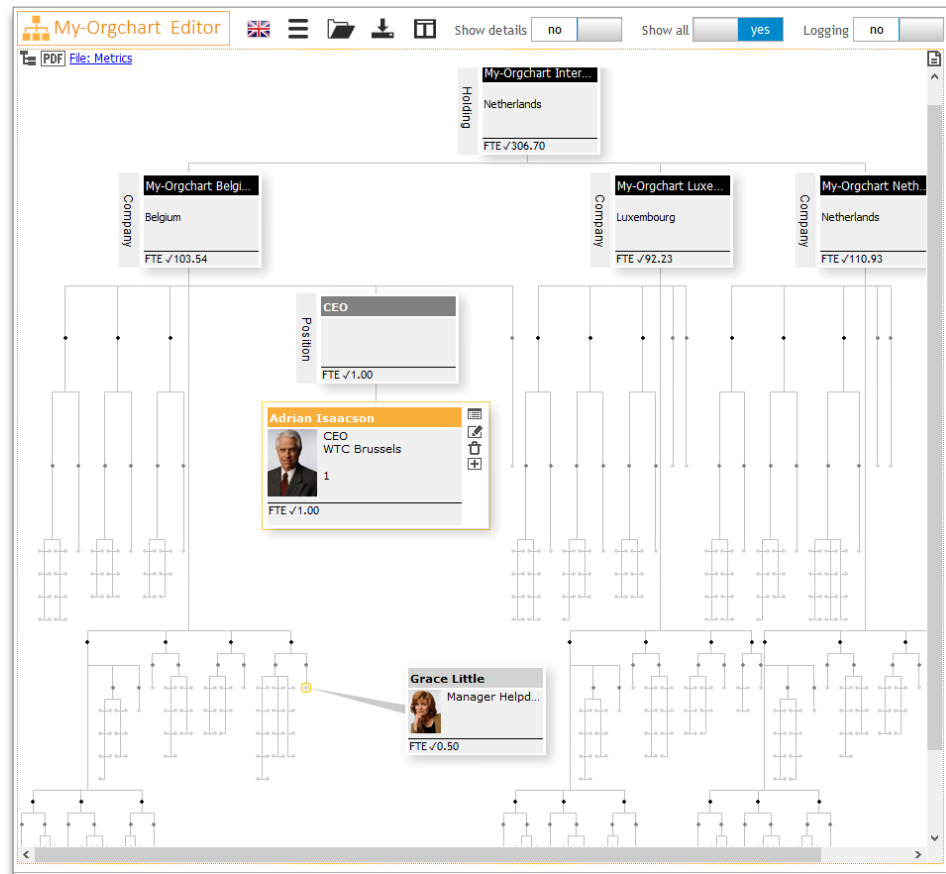
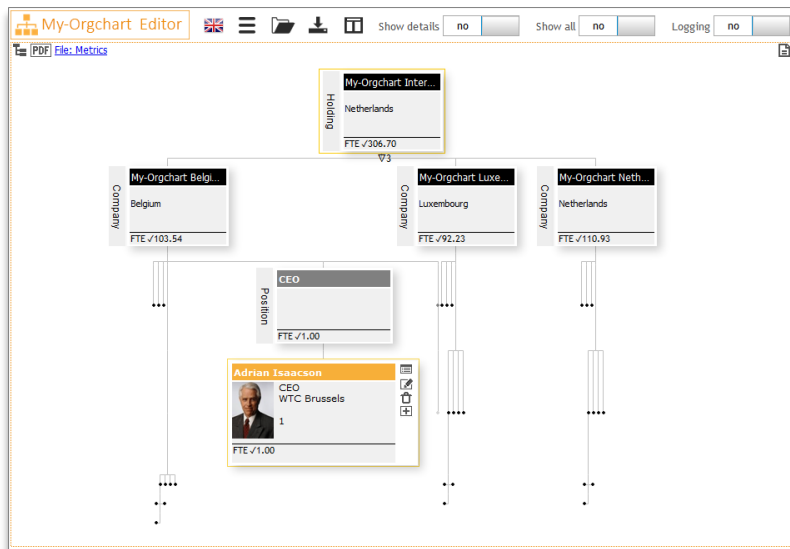
185 Anna Gorbach

Nachname	: Gorbach
Vorname	: Anna
Geschlecht	: Weiblich
Berufsbezeichnung	: Manager HR
Arbeitnehmertyp	: Internal
Land	: Belgien
Lage	: WTC Brussels
Google Maps	: https://goo.gl/maps/jMwhP
E-mail	: gorbach@my-orgchart.com
Mobiltelefonnummer	: +32(6)16753232
Büro Telefonnummer	: +32(33)8881844

Walk Through technology

A box is:

1. **Hidden** – invisible.
2. **Dot** – dot format.
3. **Default** – small format. Mouse-over: “dot” becomes “default”.
4. **Selected** – big format (orange bar). Only one box at a time.



Unfolding

Unfolding

The idea behind this technology is to show the user only a small part of the orgchart. The rest of the orgchart is either hidden or compressed. A box can have the following status:

1. **Hidden** – the box is there, but is invisible.
2. **Dot** – the box is compressed into a dot.
3. **Default** – the box is visible in small format.
4. **Selected** (only one box at the same time) – when a box is selected, the heading background is in orange, the box is in larger format, and the box submenu becomes visible.

PS: At mouse-over: a dot box pops up as a default box.

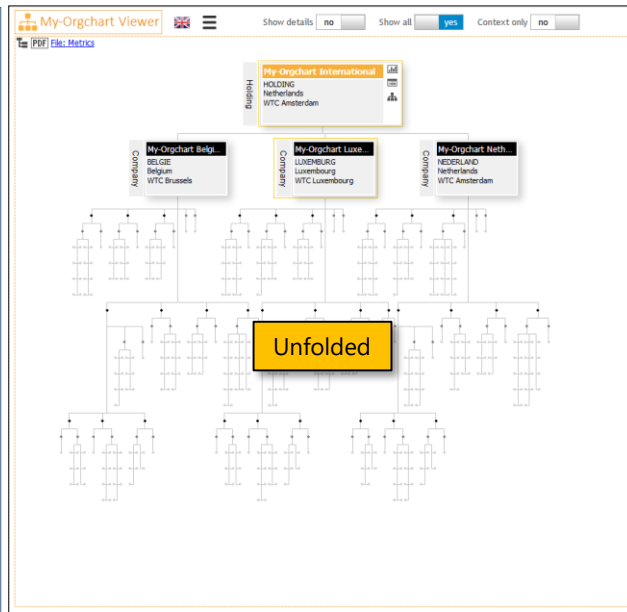
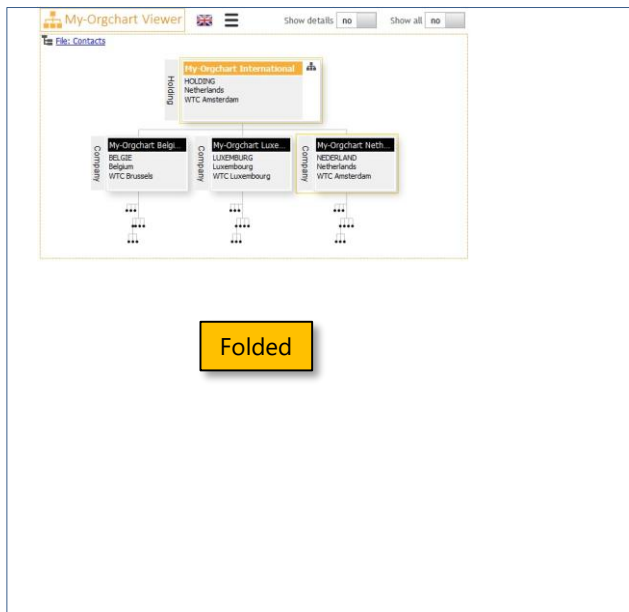
Walk Through

The folding-mechanism is “walk-through sensitive”: the box that you click on will become Selected, the boxes in the direct environment will become Defaults, the boxes nearby will become Dots, and the boxes far away will be Hidden.



There are a few important things to realize:

- Orgcharts are drawings. The Viewer actually draws the lines and boxes of an orgchart based on the data from your JSON-file.
- The Viewer draws the total orgchart **on one page**. There are no subcharts or subpages.
- Drawing an orgchart of a large, detailed organization, including all photographs, is a heavy computer task.
- The Viewer has “Folding” technology. It only shows the part of the orgchart you have asked for (by selecting).
- By default the orgchart appears folded, with the following settings: Show details Show all
- However, the user can unfold the orgchart with the following settings: Show details Show all



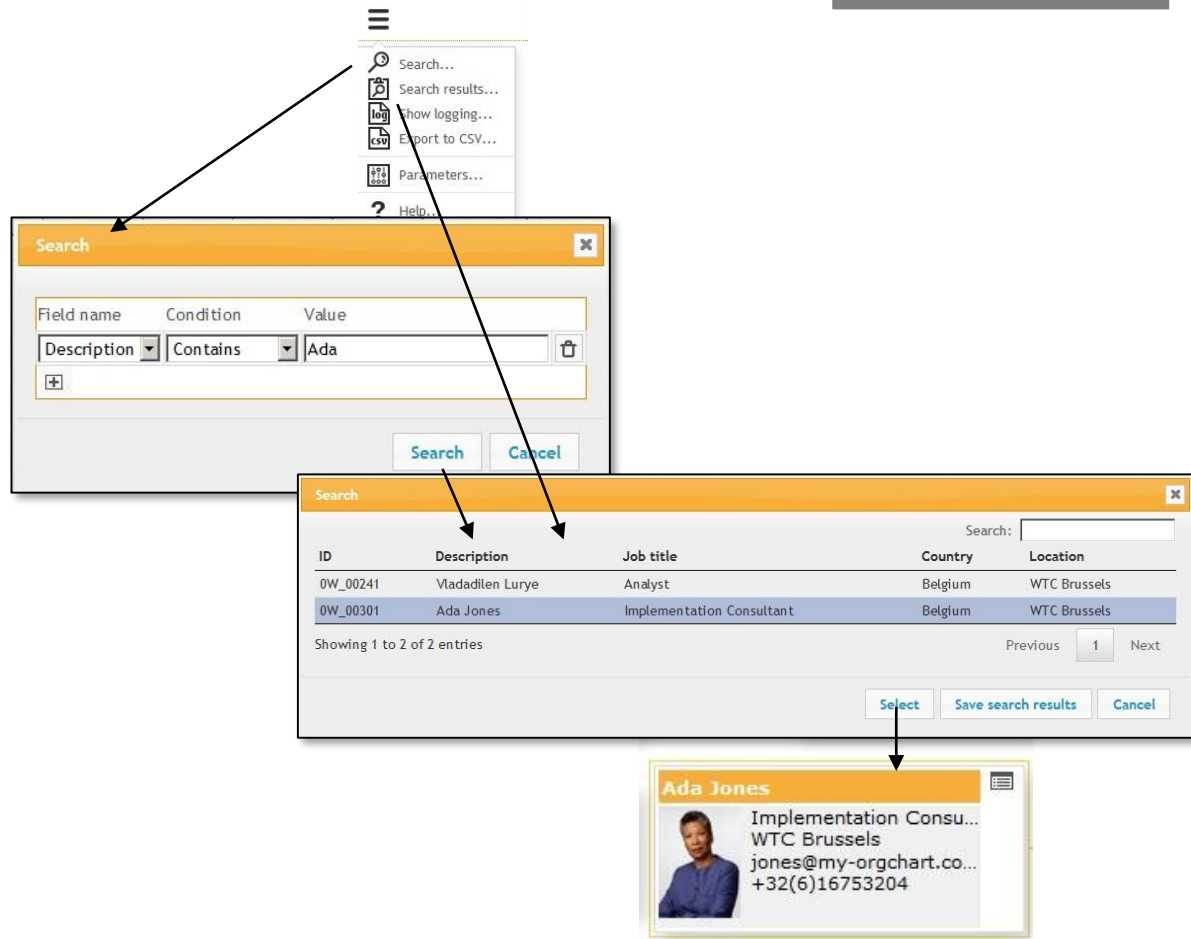
PS:

Deactivating folding and walk-through on a small device (smartphone or tablet) in combination with a large orgchart is asking for trouble: the device will probably not respond any more. Your System Administrator might decide to remove the “Show all” and “Show details” buttons from your Viewer, and keep both settings on “no” as a default.

The best way to have optimal use, is to start with the

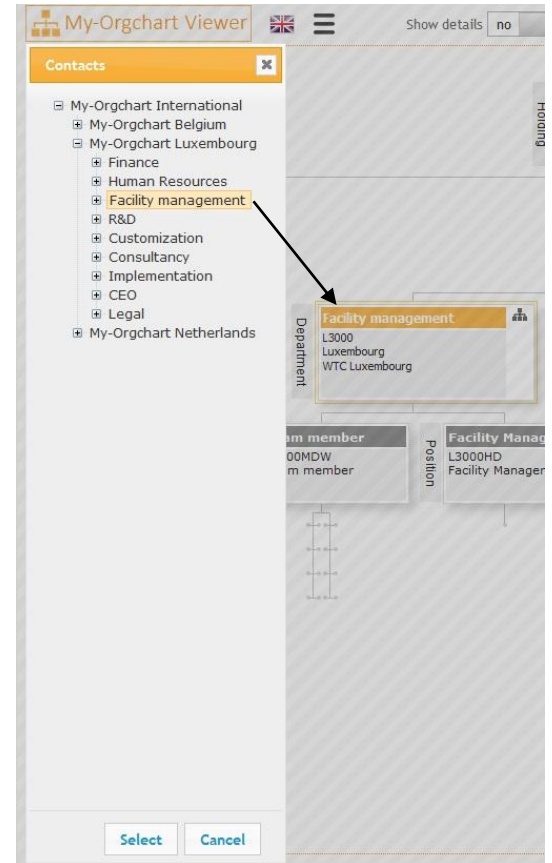
Search-facility. Here are the steps:

1. Click on one of the two Search-icons in the Ribbon Drop Down menu:
 - start a new search 
 - reload your last search results 
2. The Search option opens an empty search-window.
The Search results option opens the last search results.
3. In the search-window, you can enter multiple search criteria on multiple fields for one search.
4. Next a window with the search result will open.
Choose the record you wish to select from the list with records that match your search criteria.
5. The Viewer will move to this record, and present it a a selected box (orange bar).
6. You might want to save your search results before you move on to the selected box. In that case choose [Save search results] first.



Tree View

- Character based orgchart (require little resources).
- Open the Tree View by pressing the icon  (top left background).
- By pressing the [+] and [-] buttons, you can open or close the boxes on the level below.
- Switch to the Drawn Orgchart: choose a line from the Tree View and press the [Select] button.



Start with a folded orgchart.

To find the proper boxes ...

1. if you know what you are looking

for, you can either:

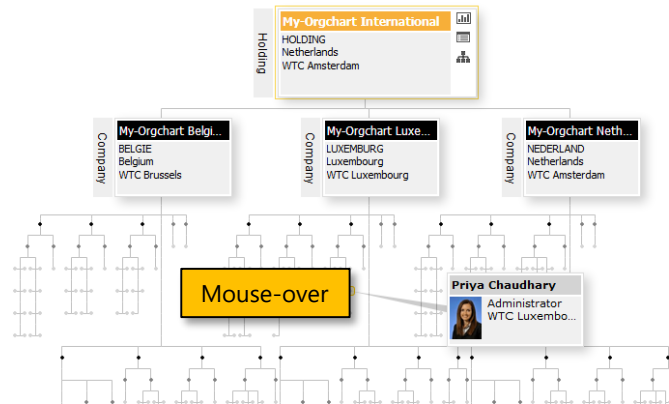
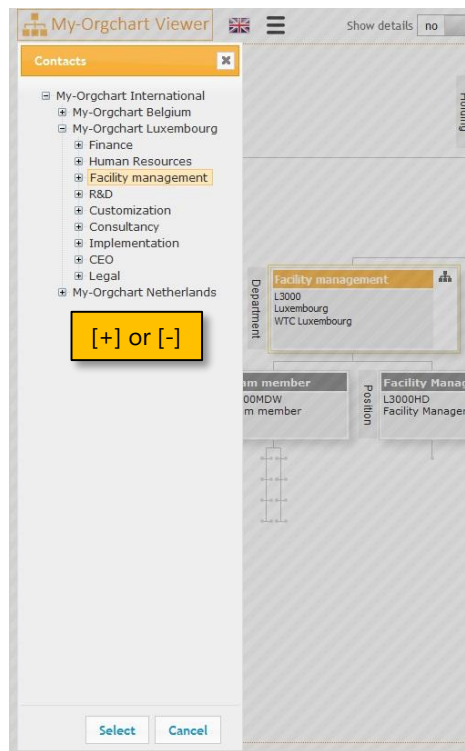
- use the Search facility if you know the "search string(s)", or
- walk directly to the right box if you know the way.

2. if you don't know what you are

looking for, then you better unfold the orgchart before you start exploring:

- the drawn orgchart with mouse-over,
- or
- the character orgchart (Tree View) with the [+] or [-] buttons.

As soon as you have found the proper box, you can request local unfold and all details.

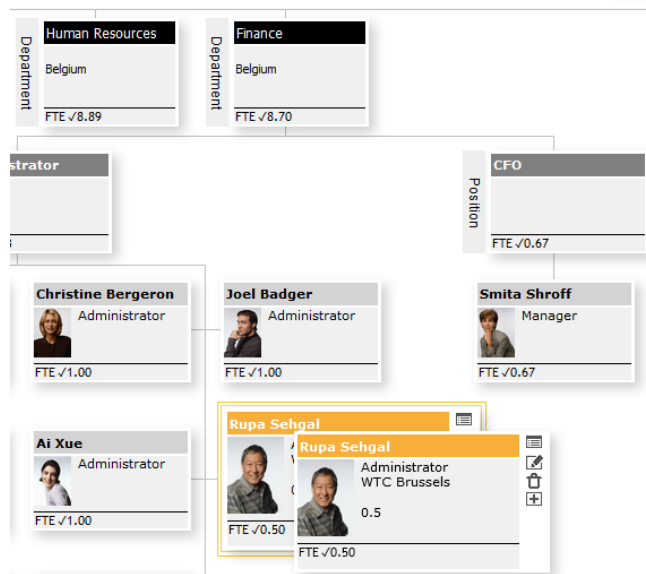


Move Boxes and Chains

- You can move boxes and chains by drag & drop.
 - Boxes: individual boxes without boxes underneath,
 - Chains: top boxes with multiple boxes underneath.
- There are three places where you can drop the box that you are moving:
 - Above another box (the system will draw it below that box),
 - In the empty space (the system will turn this box into a local top), or
 - At the Scratch Area.

Drag & Drop:

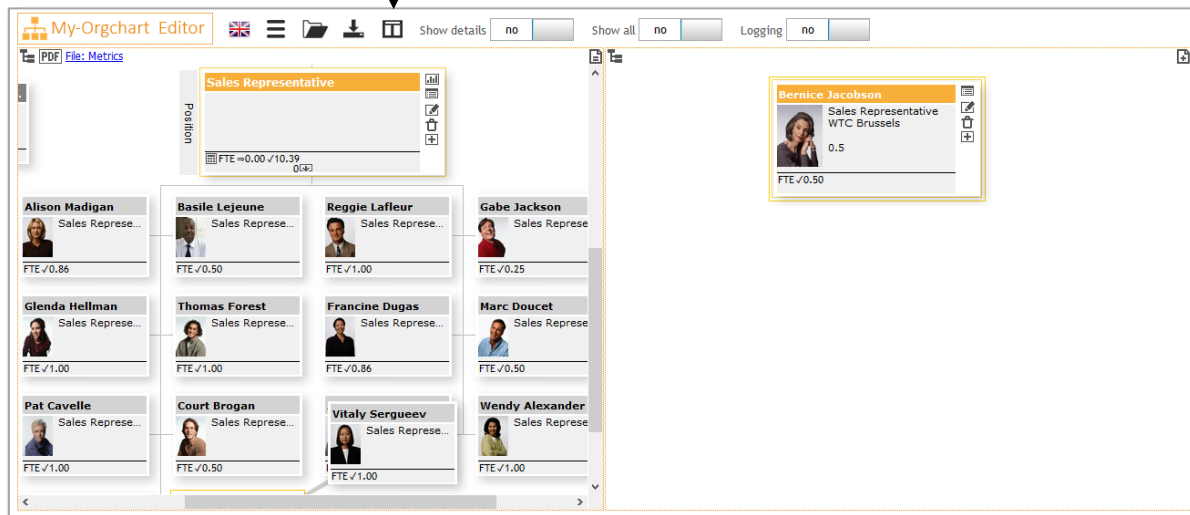
- Select a box by pressing the left mouse-button. The box will turn into a selected box (recognizable at the orange topbar).
- Keep the left-mouse button pressed!
- Then move the box to its new destination and release the left mouse button.



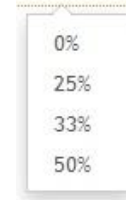
Sometimes the system might react (too) slow and/or the user might release the left mouse-button too quick. The result could be unexpected. In most cases the box, that you want to move, is either still on its place or it has become a local top. Our advice is to repeat your action more slowly. This gives the system more time to anticipate on your action.

Move Boxes and Chains over long distances

- When you want to move boxes and chains over long distances, the advice is to do this in two steps using the Scratch Area.
 - Step 1.: Select the box (or chain) you want to move. Open the Scratch Area, and drop the moved box (or chain) in the Scratch Area.
 - Step 2.: Select the destination box where you want to store your moved box underneath. Its bar becomes (and stays) orange. Then drag the moved box out of the Scratch Area and drop it (slowly) on the destination box.
- Delay. You can decide to do Step 2. later. But when you save an orgchart, the Scratch Area must be empty. Its content will not be saved. However you store all your Scratch Area boxes underneath a dummy top-box, which you can move freely between the Orgchart - and the Scratch Area.



Open and close the Scratch Area by clicking on this icon from the Top Menu. To open select 25%, 33%, or 50%. To close select 0%.



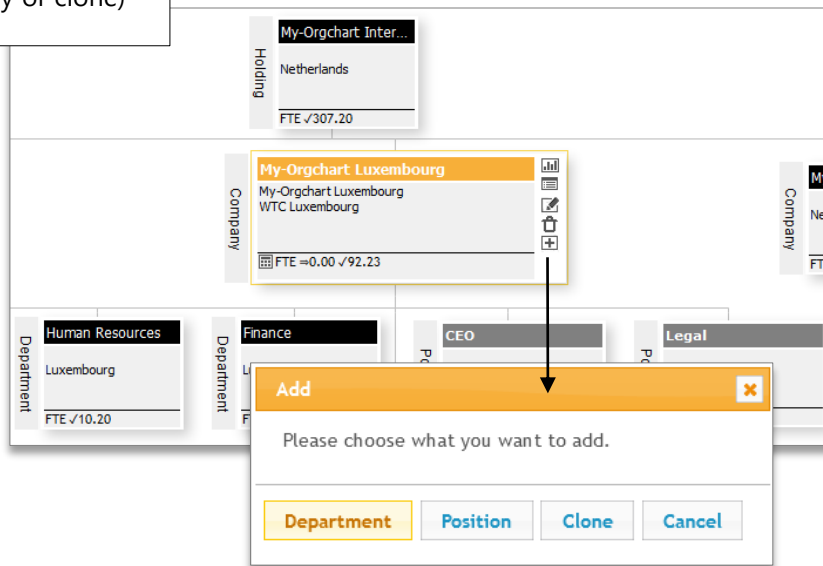
-  Edit data
-  Delete Box
-  Add Box (empty or clone)

Box menu:

- Each record is visualized as a box.
 - Available box-manipulations:
 -  Add a new box, empty or clone,
 -  Delete a box,
 - Move a box ...
- select the box, press the left mouse-button and keep it pressed, drag the box to its right position and drop the box by releasing the left mouse-button.

1-2-3:

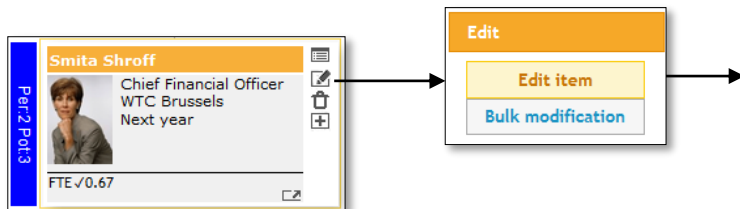
- During the box adding the system validates on type (1-2-3):
 - Underneath a department-box ❶, you can add a new department-box ❶ or a new position-box ❷,
 - Underneath a position-box ❷, you can only add an employee-box ❸,
 - Underneath an employee-box ❸, you cannot add another box.
- Cloning is always allowed.



Edit item: modify fields of one box at a time

- Pressing the Edit-button in combination with selecting "Edit item" brings you the data entry screen.
- There is a data entry screen for each boxtype (1-2-3).
- The Administrator has to set fields, that will appear in the data entry screen, in the Parameter-menu.

Notice: the decimal sign is a dot.

**Box menu:**

- Each record is visualized as a box.
- Available box-manipulations:
 - Add a new box, empty or clone,
 - Delete a box, and
 - Move a box ,
 - Edit data

- Edit data
- Delete Box
- Add Box (empty or clone)

Edit

Title	Smita Shroff
Label	Per:2 Pot:3
Label color	0000FF
Code	165
Description	Smita Shroff
Item placement	regular
Item children placement	automatic
Item adviser placement	automatic
Department name	Finance
Job title	Chief Financial Officer
Employee type	Internal
Appointment type	Permanent
FTE	0.67
Available skills	7th grade
Preference	
12Box	2_3
Potential description	Promotion in the long term
Performance description	Average
Ready for next step	Next year
Proposed action	
Executed action	

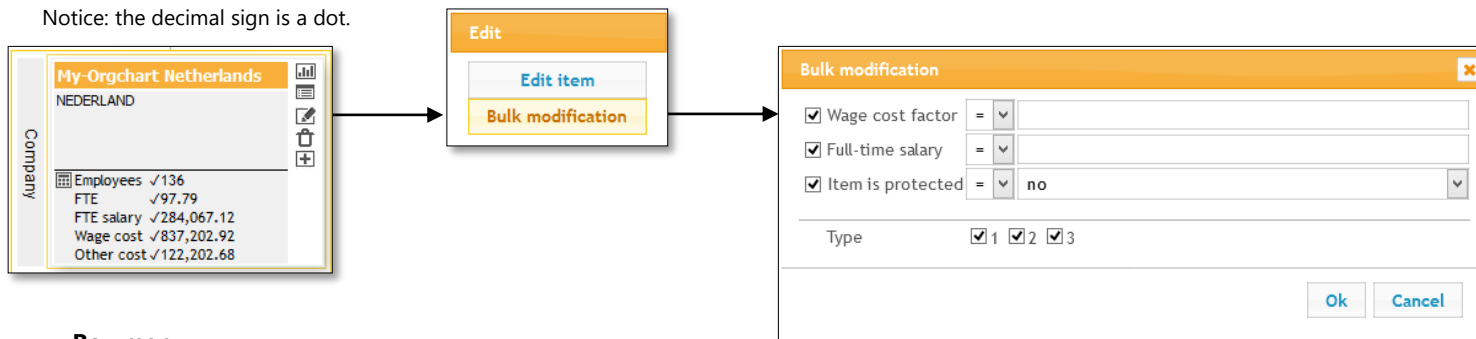
Ok

Cancel

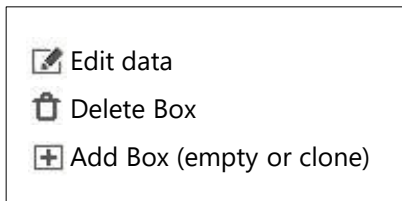
Bulk modification: modifies one field of all underneath records

- Pressing the Edit-button in combination with selecting "Bulk modification" brings you the bulk modification screen.
- Allows the user to set the contents of the preselected fields not only of the selected box but also of all boxes underneath.
- The content could either be a fixed value or the result of a formula.
- The Administrator has to set fields, that will appear in the data entry screen, in the Parameter-menu.

Notice: the decimal sign is a dot.

**Box menu:**

- Each record is visualized as a box.
- Available box-manipulations:
 - Add a new box, empty or clone,
 - Delete a box, and
 - Move a box ,
 - Edit data

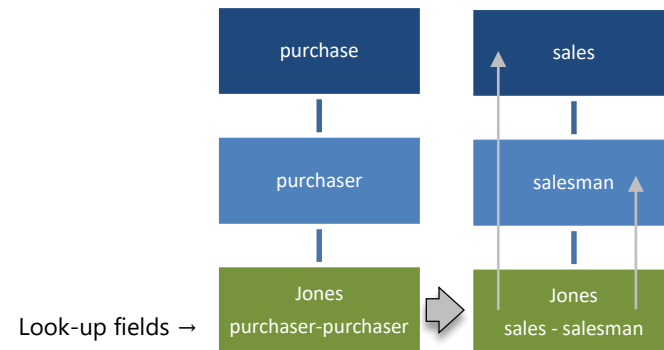
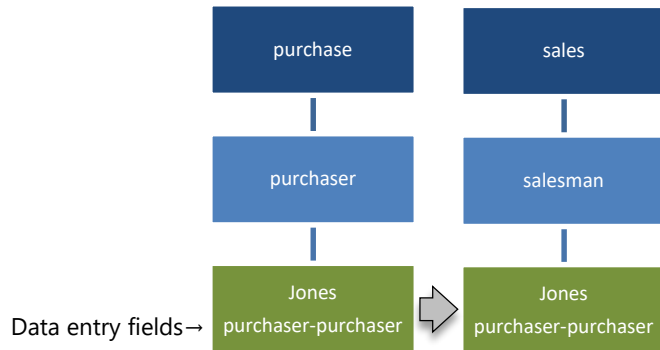


Look-up fields:

- Fields can be defined as look-up fields, which means that their values are not set by the user but by the parent-box.
- Moving the box, could lead to other values of the look-up fields.
- The Administrator has to set the fields, that will behave as look-up fields, in the Parameter-menu.

Two times the same example: Jones moves from "Purchaser" to "Salesman".

Left when the fields "Department" and "JobTitle" are set as editable and right when they are set as look-up.



Apart from the Orgchart View and the TreeView, there are more reporting facilities:

Details:

Standard Report in Table format. Works on one record at a time.



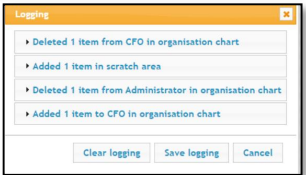
Comparison:

Standard Report in Table format. Compares two orgcharts record by record.

Action	ID	Author ID	Type	Title	File ID	File author ID	File type	File title
Deleted	SA_2010000000				SA_2010000000			Deleted
Export	SA_2010000000	SA_1000000000	1	My Orgchart Belgium	SA_2010000000	SA_1000000000	1	My Orgchart Belgium
Export	SA_1100000000	SA_1000000000	1	My Orgchart Luxembourg	SA_1100000000	SA_1000000000	1	My Orgchart Luxembourg
Export	SA_1200000000	SA_1000000000	1	My Orgchart Netherlands	SA_1200000000	SA_1000000000	1	My Orgchart Netherlands
Export	SA_1300000000	SA_1000000000	1	Finance	SA_1300000000	SA_1000000000	1	Finance
Export	SA_1400000000	SA_1000000000	1	Human Resources	SA_1400000000	SA_1000000000	1	Human Resources
Export	SA_1500000000	SA_1000000000	1	Facility management	SA_1500000000	SA_1000000000	1	Facility management
Export	SA_1600000000	SA_1000000000	1	R&D	SA_1600000000	SA_1000000000	1	R&D
Export	SA_1700000000	SA_1000000000	1	Marketing & Sales	SA_1700000000	SA_1000000000	1	Marketing & Sales
Export	SA_1800000000	SA_1000000000	1	Inventory	SA_1800000000	SA_1000000000	1	Inventory
Export	SA_1900000000	SA_1000000000	1	Administration	SA_1900000000	SA_1000000000	1	Administration
Export	SA_2000000000	SA_1000000000	2	CEO	SA_2000000000	SA_1000000000	2	CEO
Export	SA_2100000000	SA_1000000000	2	Legal	SA_2100000000	SA_1000000000	2	Legal
Export	SA_2200000000	SA_1000000000	1	Finance	SA_2200000000	SA_1000000000	1	Finance
Export	SA_2300000000	SA_1000000000	1	Human Resources	SA_2300000000	SA_1000000000	1	Human Resources

Logging:

Standard Report in Table format. If logging is switched on, it reports all modified records.



Metrics:

Ad-Hoc Reporting facility in Pivot Table or Graph format. Works on all records.

FTE		Age group	Gender	Female	Male	Total
Working hours group	30-39	1	2			
Years of service group	30-39	4	2	4		
Employee type	at-01	3	3			
Appointment type	30-39	2	2			
Salary scale		10	3	13		
FTE salary						

Modeling:

Modeling and Ad-Hoc reporting facility. Several formats. Works on all records.

	Plan	Realization	Difference	Percentage %
FTE salary	3,401,054.34	3,401,053.19	-1.15	100.00
Wage cost	9,912,709.39	9,912,706.86	-2.53	100.00
Other cost	0.00	1,455,077.25	1,455,077.25	0.00

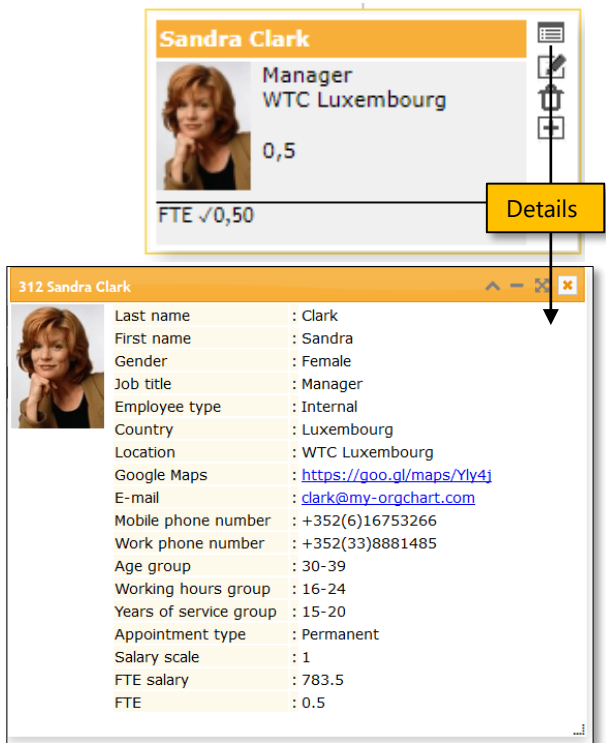
Details (Pop-up Window):

Details-icon in Box-Menu

- When the Details-icon shows up on the right side of the Box-Menu, you can ask a for the pop-up window with box-related details.
- Not all boxes will have a Details-icon and not all box-related fields will appear in the Details Window.
- Each field from the sourcefile could appear in the Details Window. Even additional, ad-hoc fields could appear.
- It will depend on the parameters that the Administrator has set.

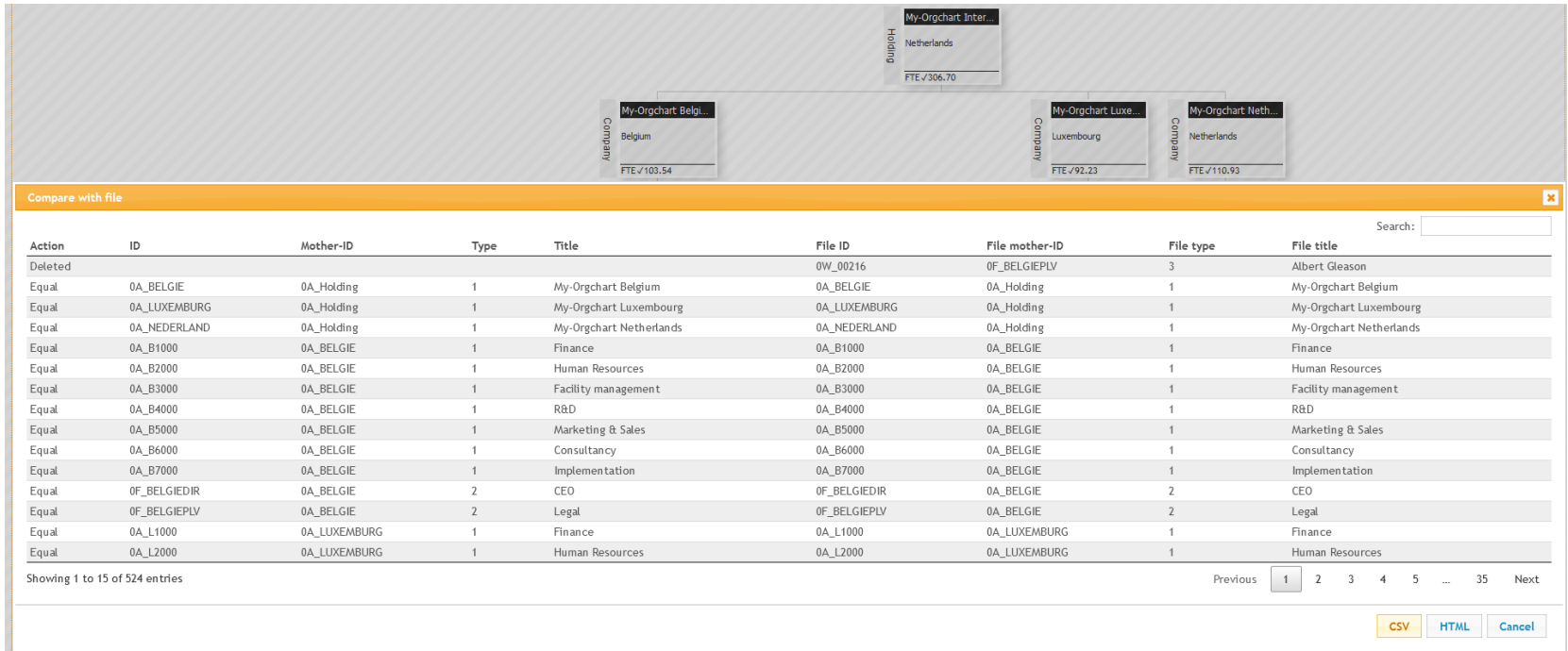
Open the Details Window:

- Click on the Details-icon to open the Details Window.
- You can click on hyperlinks for additional information from external websites or additional action (e.g. email).
- The pop-up windows stays open until you close it. Even if you select another box.
- You can open multiple pop-up windows related to multiple boxes.
- Close the Details Window by pressing [x] (top right of the pop-up window).



Compare Orgcharts

- You can compare two orgcharts. The open JSON-file with another JSON-file. The system reports (record by record) the differences between the two JSON's.
- Open the 1st orgchart. Press the Compare icon and select the 2nd orgchart. The system will respond with the comparison report.



Action	ID	Mother-ID	Type	Title	File ID	File mother-ID	File type	File title
Deleted					0W_00216	0F_BELGIEPLV	3	Albert Gleason
Equal	0A_BELGIE	0A_Holding	1	My-Orgchart Belgium	0A_BELGIE	0A_Holding	1	My-Orgchart Belgium
Equal	0A_LUXEMBURG	0A_Holding	1	My-Orgchart Luxembourg	0A_LUXEMBURG	0A_Holding	1	My-Orgchart Luxembourg
Equal	0A_NEDERLAND	0A_Holding	1	My-Orgchart Netherlands	0A_NEDERLAND	0A_Holding	1	My-Orgchart Netherlands
Equal	0A_B1000	0A_BELGIE	1	Finance	0A_B1000	0A_BELGIE	1	Finance
Equal	0A_B2000	0A_BELGIE	1	Human Resources	0A_B2000	0A_BELGIE	1	Human Resources
Equal	0A_B3000	0A_BELGIE	1	Facility management	0A_B3000	0A_BELGIE	1	Facility management
Equal	0A_B4000	0A_BELGIE	1	R&D	0A_B4000	0A_BELGIE	1	R&D
Equal	0A_B5000	0A_BELGIE	1	Marketing & Sales	0A_B5000	0A_BELGIE	1	Marketing & Sales
Equal	0A_B6000	0A_BELGIE	1	Consultancy	0A_B6000	0A_BELGIE	1	Consultancy
Equal	0A_B7000	0A_BELGIE	1	Implementation	0A_B7000	0A_BELGIE	1	Implementation
Equal	0F_BELGIEDIR	0A_BELGIE	2	CEO	0F_BELGIEDIR	0A_BELGIE	2	CEO
Equal	0F_BELGIEPLV	0A_BELGIE	2	Legal	0F_BELGIEPLV	0A_BELGIE	2	Legal
Equal	0A_L1000	0A_LUXEMBURG	1	Finance	0A_L1000	0A_LUXEMBURG	1	Finance
Equal	0A_L2000	0A_LUXEMBURG	1	Human Resources	0A_L2000	0A_LUXEMBURG	1	Human Resources

Showing 1 to 15 of 524 entries

Previous 1 2 3 4 5 ... 35 Next

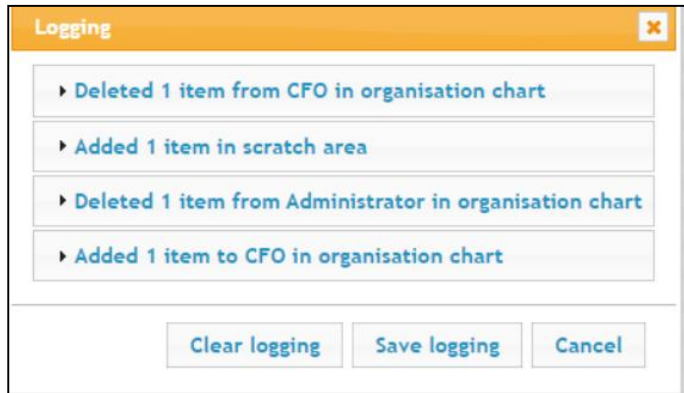
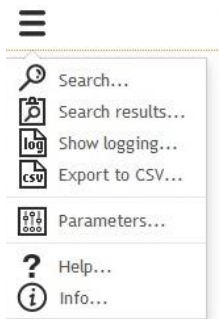
CSV HTML Cancel

Logged Modification:  Log icon in the Main Menu

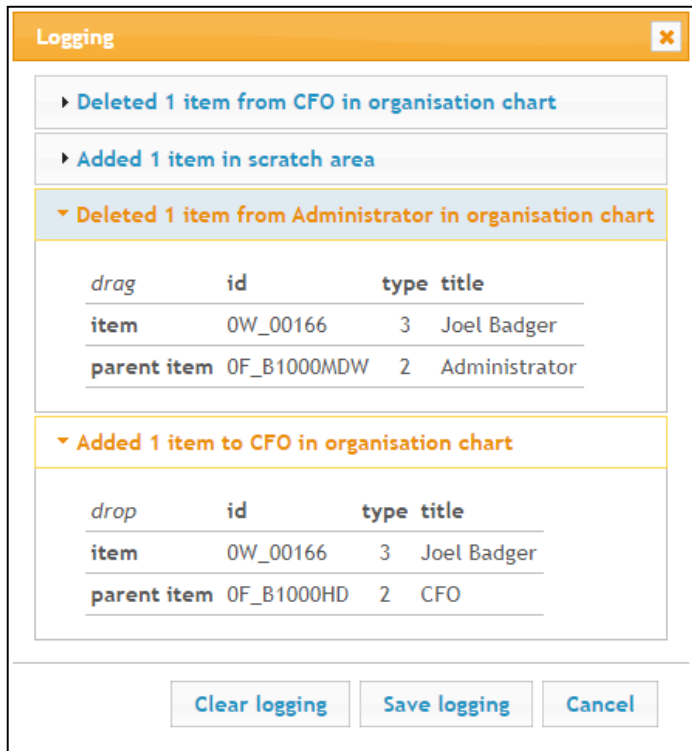
- You can ask the system to log all modifications in the orgchart (Log-slide: Yes).
- At any moment in time you can ask for the logging report.
- All loggings are stored until you either switch the Log-slide to No, or you close the file.

Show Logging:

- Click on the Log icon in the Main Menu. The Logging Window will appear. You can click on the arrow in front of each modification, to see further details.
- In the Logging window you can ask the system either to Clear or to Save your loggings.



Logging ☐ ☒ yes

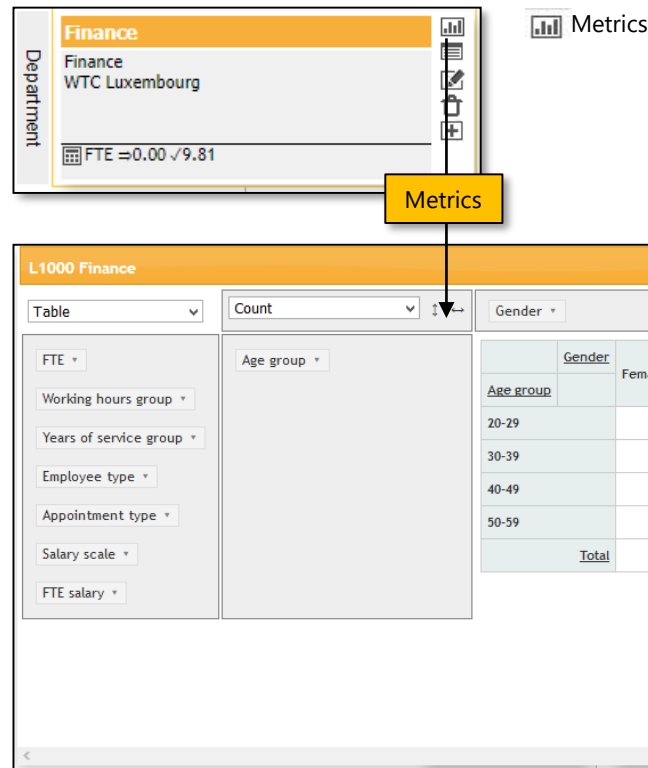


Metrics (Pop-up Window): Metrics-icon in Box-Menu

- When the Metrics-icon shows up on the right side of the Box-Menu, you can ask a for the pop-up window with chain-related details.
- Not all boxes will have a Metrics-icon and not all box-related fields will appear in the Metrics Window.
- Each field from the sourcefile could appear in the Metrics Window. Even additional, ad-hoc fields could appear.
- It will depend on the parameters that the Administrator has set.

Open the Metrics Window:

- Click on the Metrics-icon to open the Metrics Window.
- The Metrics-calculations will involve the selected box and all boxes underneath (chain).
- The pop-up windows stays open until you close it. Even if you select another box.
- You can open multiple pop-up windows related to multiple boxes.
- Close the Metrics Window by pressing [x] (top right of the pop-up window).



The diagram illustrates the process of opening the Metrics Window. It shows a 'Box-Menu' for the 'Finance' department, specifically for 'WTC Luxembourg'. The menu includes a 'Metrics' icon (a bar chart). A yellow box labeled 'Metrics' with an arrow points from this icon to the 'Metrics Window'.

The 'Metrics Window' is titled 'L1000 Finance'. It features a 'Table' dropdown set to 'Count' and a 'Gender' dropdown. The main area displays a table with columns for 'Age group', 'Female', 'Male', and 'Total'.

Age group	Female	Male	Total
20-29	1	1	2
30-39	4	2	6
40-49	3		3
50-59	2		2
Total	10	3	13

Metrics is based on Hypercube- or OLAP-technology. Here is what you can do with this technology: Slicing, Dicing, Roll Up, Drill Down and Pivot..

- **Pivot**

You can pivot the table by drag & drop with the dimensions from unused to used and from horizontal to vertical.

- **Slice & Dice**

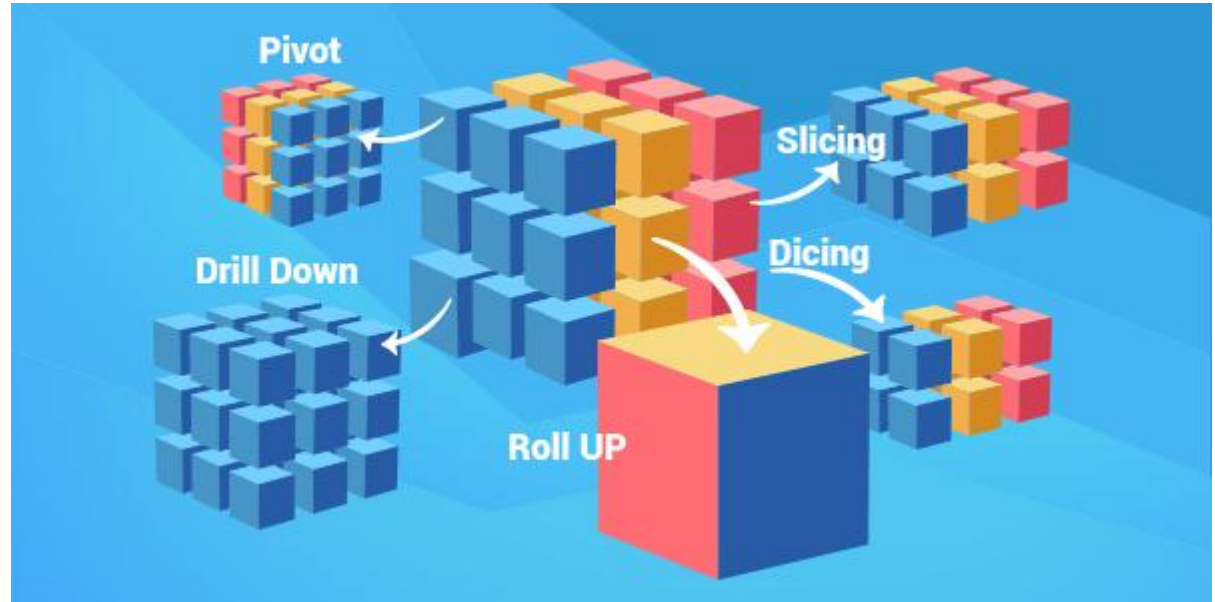
You can take subsets of the total population either by starting from a box lower in the hierarchy or by setting the selections.

- **Roll Up**

The Metrics figures are aggregated (rolled up) along the not used dimensions.

- **Drill Down**

The opposite: if you move a dimension from the unused to one of the used areas, the figures will drill down. You can have further drill downs by adding multiple dimensions to a used area.



PS:

Hypercube or OLAP analysis is done with figures only. The figures (in the cells) could be “counts”, “totals”, “amounts”, or “percentages”. Your Administrator decides which figures and which dimensions you will find in your hypercube model.

Dimensions:

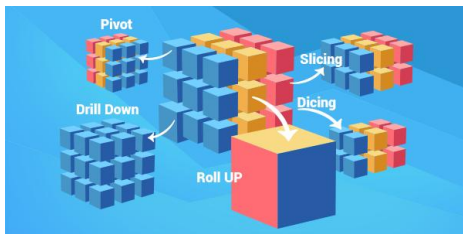
- A normal Cube is 3-dimensional. An Hypercube is multi-dimensional.
- On a 2-dimensional flatscreen, only 2-dimensions (sorts) can be shown. However, more dimensions can be shown as sub-sorts.

Variables:

- Variables are the quantitative fields.
- Only one variable at a time can be presented.

NB:

In this example the used dimensions are "Salary Scale" and "Appointment Type" and the used variable is "FTE salary".



LUXEMBOURG My-Orgchart Luxembourg Luxembourg

Table Sum Appointment type

FTE salary

Working hours group

Years of service group

Gender

Employee type

Type

Country

Formatieplaats

Department name

Job title

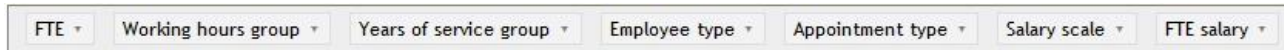
Age group

Salary scale

	Appointment type	Permanent	Temporary	Total
Salary scale				
1		12,239.56		12,239.56
2		8,690.25		8,690.25
3		9,383.41	1,305.00	10,688.41
4		13,306.25		13,306.25
5		7,217.73		7,217.73
6		16,568.00		16,568.00
7		12,287.22	2,275.00	14,562.22
8		13,364.50		13,364.50
9		25,191.28	2,819.00	28,010.28
10		13,148.22	3,330.00	16,478.22
11		31,601.50		31,601.50
12		16,159.33	986.25	17,145.58
13		19,759.34	4,440.00	24,199.34
14		23,587.08		23,587.08
Total		222,503.67	15,155.25	237,658.92

When an Metrics opens, a tabular report will become visible with dimensions and variables.

- Unused dimensions**



At the top there is a bar with unused dimensions. Those dimensions (sort criteria) are available for use, but at the start they are parked here.

- Used dimensions**

Then we have the measures which are in use right now.

In our example: Age group and Gender.

Age group is used for the **vertical sort** and Gender for the **horizontal sort**.



You can drag & drop dimensions: from unused to used, or from horizontal to vertical and back.

The table will rotate accordingly.

PS:

Your Administrator influences the number of dimensions, the place of the dimensions (used/unused, horizontal/vertical) at the startup, and the variables (numeric fields) that will appear in the start table.

Dimensions and variables can only be added to the reporting environment, if they are available in the (JSON) sourcefile.

LUXEMBURG My-Orchart Luxembourg

		Age group					Total
		20-29	30-39	40-49	50-59	60 >	
Gender	Female	9	31	16	8	3	67
	Male	10	24	18	6	2	60
Total		19	55	34	14	5	127

You can roll up or drill down on dimensions.

In the roll up example all dimensions are in the unused area, which means that all dimensions are rolled up and that the displayed amount represents the total wage cost over the full year.

You can drill down by moving dimensions to the used area. In this example: department and function are moved to the used, vertical area. This offers a larger and more detailed table (a Drill Down).

You can have a roll up again by moving used dimensions back to the unused area.

The total amount (€ 9,912,706.86) remains all the time the same.

PS:

When you drag & drop with dimensions, you have to watch the readability of the chart. In particular, graphs and heathmaps will become unreadable when you drill down too much.

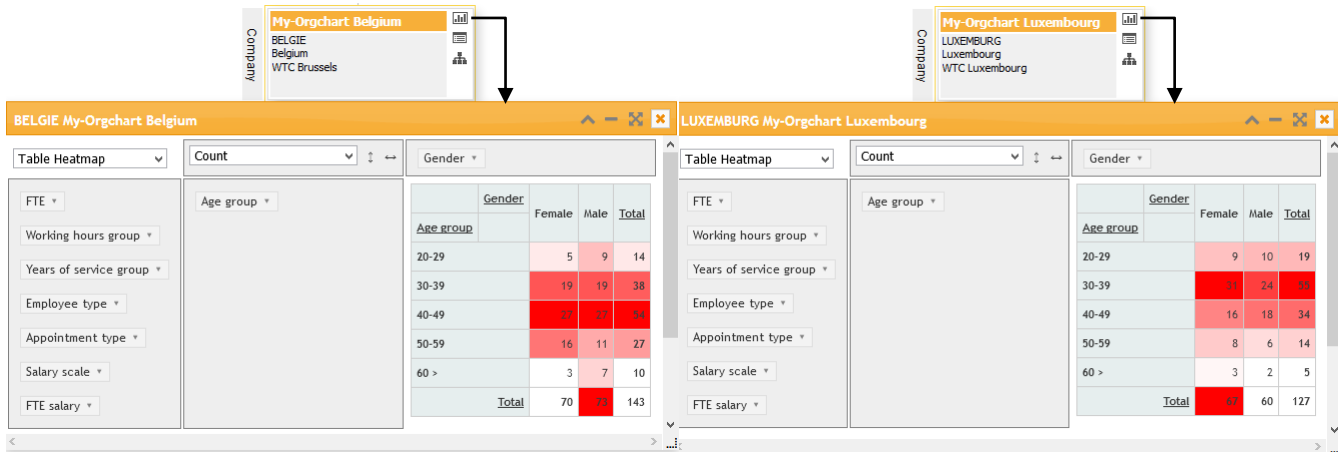
There are also limits in the size of the table.

The screenshot shows a reporting tool interface with two windows. The top window, titled '2019 Demo bedrijf', is in a 'roll up' state. It has a 'Table' dropdown, a 'Sum' dropdown, and a 'Wage cost' dropdown. The dimensions 'Year', 'Period', 'Working hours group', 'FTE group', 'Name', and 'Gender' are in the unused area. The bottom window, also titled '2019 Demo bedrijf', is in a 'drill down' state. It has the same 'Table', 'Sum', and 'Wage cost' dropdowns. The dimensions 'Department name' and 'Function name' are moved to the used area. A double-headed arrow indicates the transition between the two states. The right side of the interface shows a table with the following data:

Department name	Function name	Total
Consultancy	Consultant	872,169.87
	Manager Consultancy	150,198.30
Customization	Analyst	457,177.14
	Team Leader	25,453.95
Development	Analyst	819,098.66
	Team Leader	138,674.14
Facility management	Analyst	1,065,169.47
	Facility Manager	54,964.01
Finance	Administrator	1,249,712.33
	CFO	122,763.51
Human Resources	HR Administrator	788,280.37
	Manager HR	81,062.62
Implementation	Helpdesk Representative	1,539,815.53
	Manager Helpdesk	64,130.27
Marketing & Sales	Manager Marketing & Sales	110,932.73
	Sales Representative	583,706.65
My-Orgchart Netherlands	CEO	212,053.73
	Legal	90,183.67
R&D	Analyst	1,052,878.36
	Manager R&D	34,515.89
Research	Analyst	399,765.65
	Total	9,912,706.86

Slicing and dicing means that you are not analyzing the total database (or population) but only a part of it. There are two ways to do so:

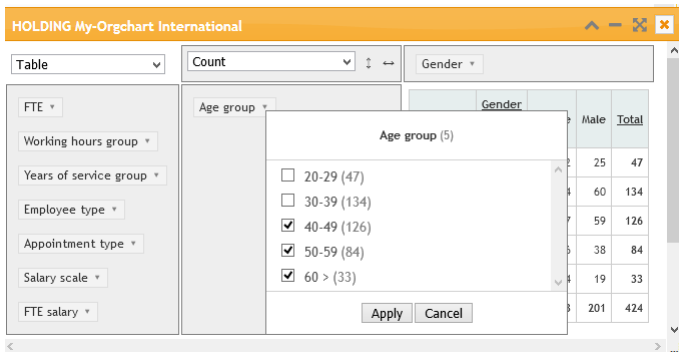
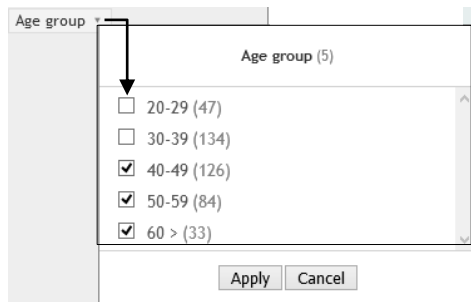
1. by the choice of your start box (the icon from the Belgium box leads to another table than the icon of the Luxembourg box),



PS:

You can leave multiple pop-up windows (tables) open to compare the results.

2. and by selecting from an available dimension.



In the top left grey area, there are two drop down menu's with which you can influence the content of the cells.

- The drop down menu above gives you the manipulation types, e.g.: count, sum, fraction, average, etc.
- The drop down menu below gives you the variables. In the cells will only appear numeric data (figures). If the variable is alphanumeric, then "count" will be the only manipulation type.

The screenshot shows the 'HOLDING My-Orgchart Inter' interface. At the top, there is a title bar with the text 'HOLDING My-Orgchart Inter' and standard window controls. Below the title bar, there are two main sections. The left section contains a list of variables: 'FTE', 'Working hours group', 'Years of service group', 'Employee type', 'Appointment type', 'Salary scale', and 'FTE salary'. The right section contains a table with columns 'Gender', 'Female', 'Male', and 'Total'. The table has rows for 'Age group' (20-29, 30-39, 40-49, 50-59, 60 >) and a 'Total' row. A dropdown menu is open above the 'Sum' variable, showing options: 'Count', 'Sum', 'Count as fraction of total', 'Sum as fraction of total', and 'Average'. Another dropdown menu is open below the 'FTE' variable, showing options: 'FTE', 'FTE salary', 'Wage cost', and 'Other cost'.

	Gender	Female	Male	Total
Age group				
20-29		0.00	0.00	0.00
30-39		0.00	0.00	0.00
40-49		0.00	0.00	0.00
50-59		0.00	0.00	0.00
60 >		0.00	0.00	0.00
Total		0.00	0.00	0.00

PS:

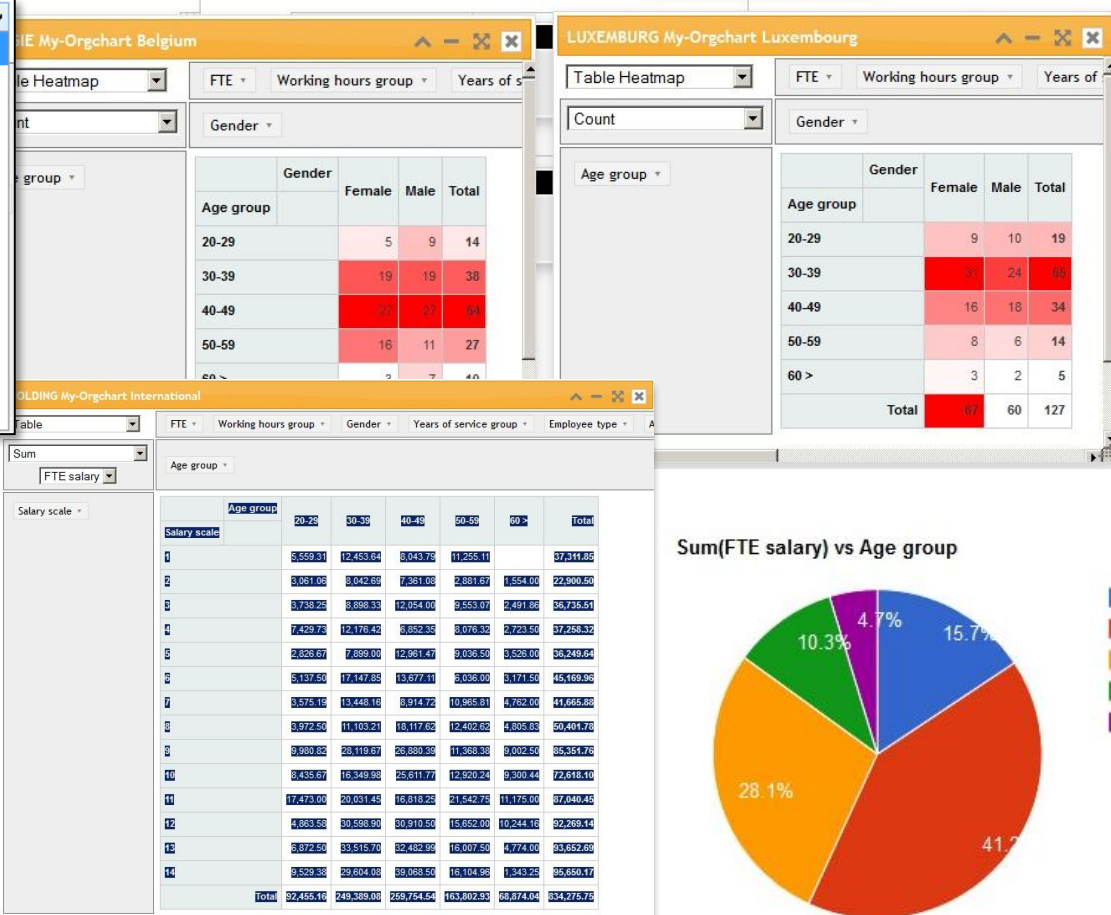
Your Administrator sets the variables and calculation types that will appear in your start table.

The user has 12 report types to choose from (drop down menu, top left).

Table is most common used, but color graphs and heathmaps are also possible.

Table gives you the opportunity to copy/paste your data (to a spreadsheet or other software).

- Table
- Table Barchart
- Table Heatmap
- Col Heatmap
- Row Heatmap
- Pie Chart
- Bar Chart
- Stacked Bar Chart
- Column Chart
- Stacked Column Chart
- Line Chart
- Area Chart



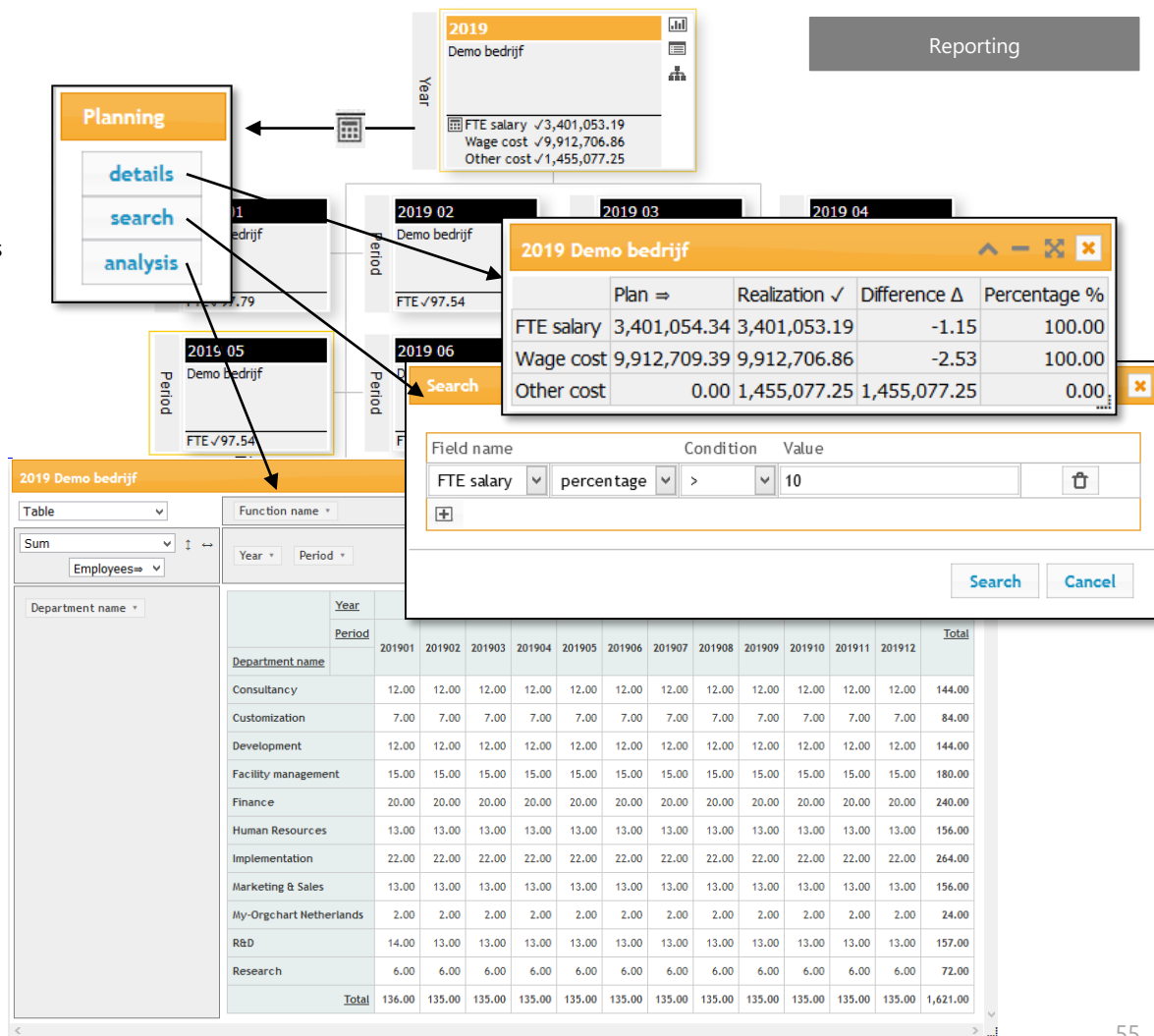
Modeling section:

- Boxes could contain modeling information. You can recognize these boxes at the horizontal splitline. Below this line you will find the modeling results.
- You can have more detailed modeling information by clicking the Modeling Details icon .
- The Modeling Menu will appear offering you the following options:
 - [details]: with details on the budget exhausting,
 - [search]: search for (high) budget deviations,
 - [analysis]: specific pivot table analysis based on personnel budgeting.

When finished you can close all windows by pressing [x] (top right of each pop-up window).

NB:

More on the subject of Modeling is in the Planning Manual.



The screenshot displays the 'Modeling' section of a software application. The main window features a 'Planning' menu with options: 'details', 'search', and 'analysis'. A 'Reporting' button is located in the top right corner. A '2019 Demo bedrijf' window is open, showing a table of costs (FTE salary, Wage cost, Other cost) and a 'Search' button. A '2019 Demo bedrijf' window is also open, showing a table of costs (FTE salary, Wage cost, Other cost) and a 'Search' button. A '2019 Demo bedrijf' window is also open, showing a table of costs (FTE salary, Wage cost, Other cost) and a 'Search' button. A '2019 Demo bedrijf' window is also open, showing a table of costs (FTE salary, Wage cost, Other cost) and a 'Search' button.

2019 Demo bedrijf

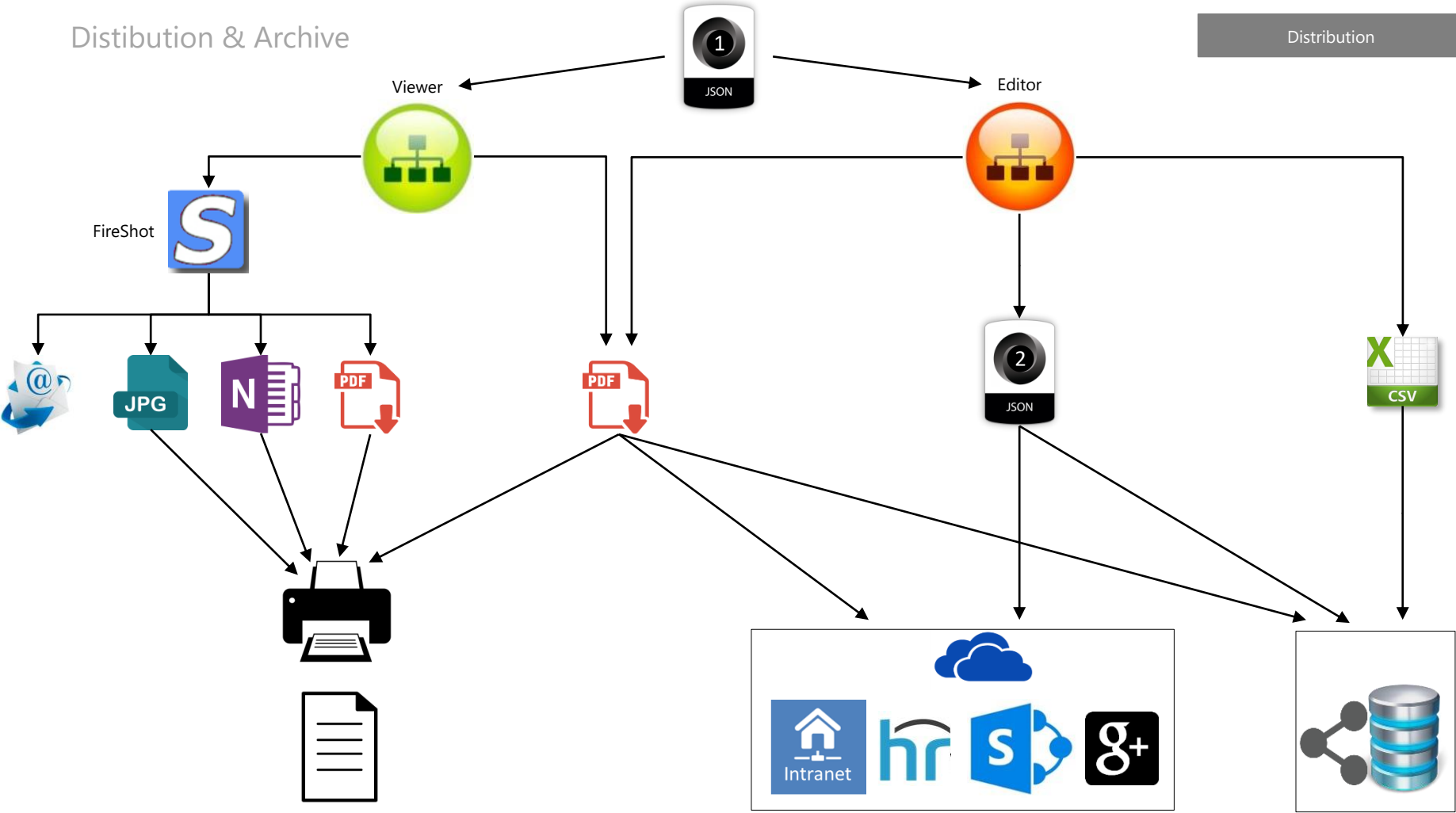
Field name	Condition	Value
FTE salary	percentage	> 10

2019 Demo bedrijf

	Plan	Realization	Difference	Percentage
FTE salary	3,401,054.34	3,401,053.19	-1.15	100.00
Wage cost	9,912,709.39	9,912,706.86	-2.53	100.00
Other cost	0.00	1,455,077.25	1,455,077.25	0.00

2019 Demo bedrijf

Department name	201901	201902	201903	201904	201905	201906	201907	201908	201909	201910	201911	201912	Total
Consultancy	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	144.00
Customization	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	84.00
Development	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	12.00	144.00
Facility management	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	15.00	180.00
Finance	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	240.00
Human Resources	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	156.00
Implementation	22.00	22.00	22.00	22.00	22.00	22.00	22.00	22.00	22.00	22.00	22.00	22.00	264.00
Marketing & Sales	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	156.00
My-Orgchart Netherlands	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	24.00
R&D	14.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	13.00	157.00
Research	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	72.00
Total	136.00	135.00	135.00	135.00	135.00	135.00	135.00	135.00	135.00	135.00	135.00	135.00	1,621.00



Save

Save:

- After modifying, you might want to save and distribute your orgchart. There are three alternatives:

1. Save your orgchart in JSON-format,
2. Save your orgchart in PDF-format *,
3. Save your orgchart data in Excel/CSV-format*.

*Files in PDF- or CSV-format are out of reach of OrgPlan-products.

JSON-format:

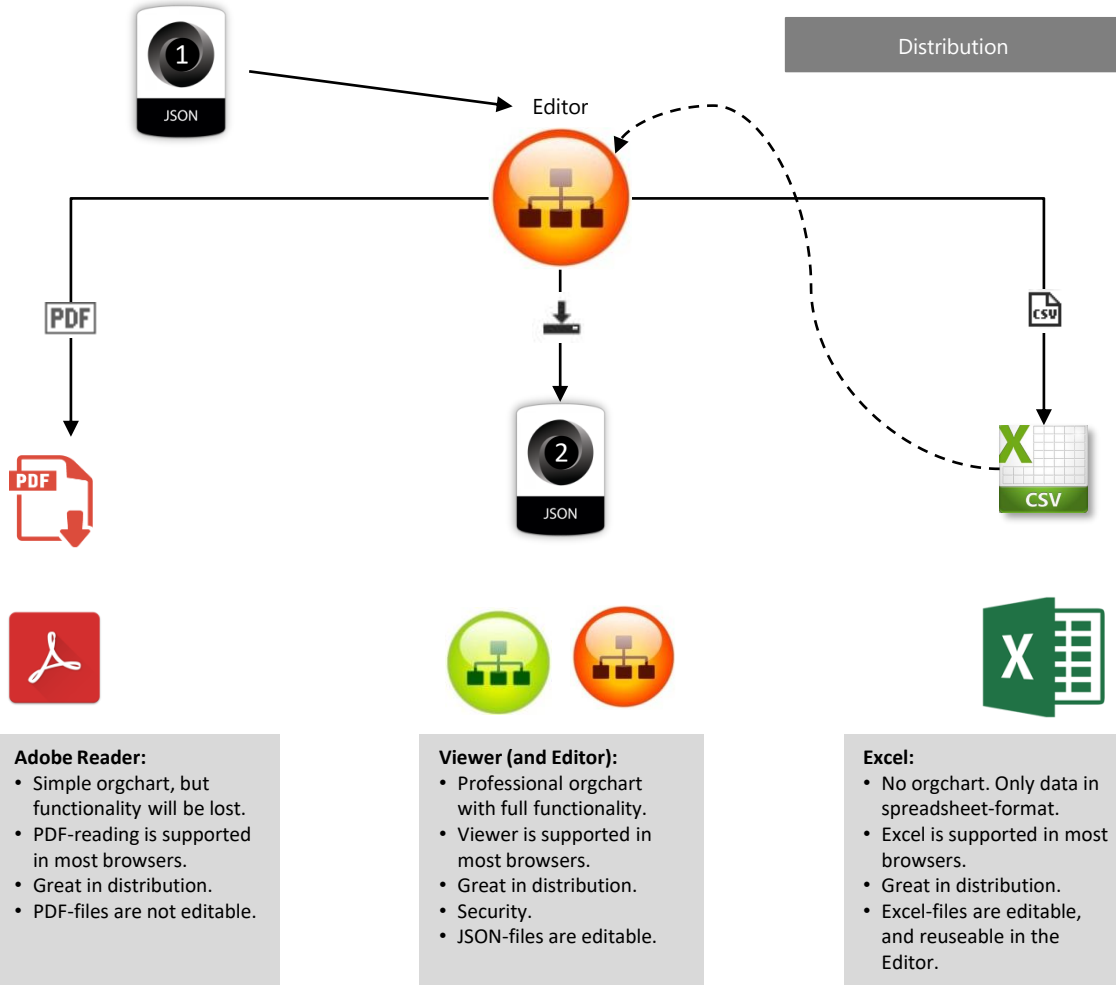
- Open with: Viewer (or Editor),
- Distribution: webserver (intranet) or physical (email, copy, etc.),
- Functionality: full.

PDF-format:

- Open with: PDF-Reader (Adobe, etc.),
- Distribution: webserver (intranet) or physical (email, copy, etc.),
- Functionality: limited (no pop-up windows, etc).

Excel/CSV-format:

- Open with: Excel,
- Distribution: physical (email, copy, etc.),
- Functionality: different (no orgchart, but great data entry, etc).



Option	Method	Format	Size	
PDF *	Export	PDF	Full-size	Print with a wallpaper-printer. No Edit.
FireShot **	Capture	PDF	Full-size	Resize and edit. Print with any printer.
		PDF	A4	Breakdown till multiple A4's. Print with an A4-printer.
		JPEG, etc.	Full-size *	Photo-format. View with photo-viewer, or edit with Paint.
		One-Note	Full-size *	Export and print with One-Note.
		Application	Full-size *	Export to Facebook, Flickr, Picassa, Twitter, FTP, ...
		Email	Full-size *	Append to email.
		Clipboard	Full-size *	Load in Clipboard.

* Save as PDF is available in the Editor and the Viewer. We recommend to use PDF in the Viewer , because there it can be combined with Local Top and Context View.

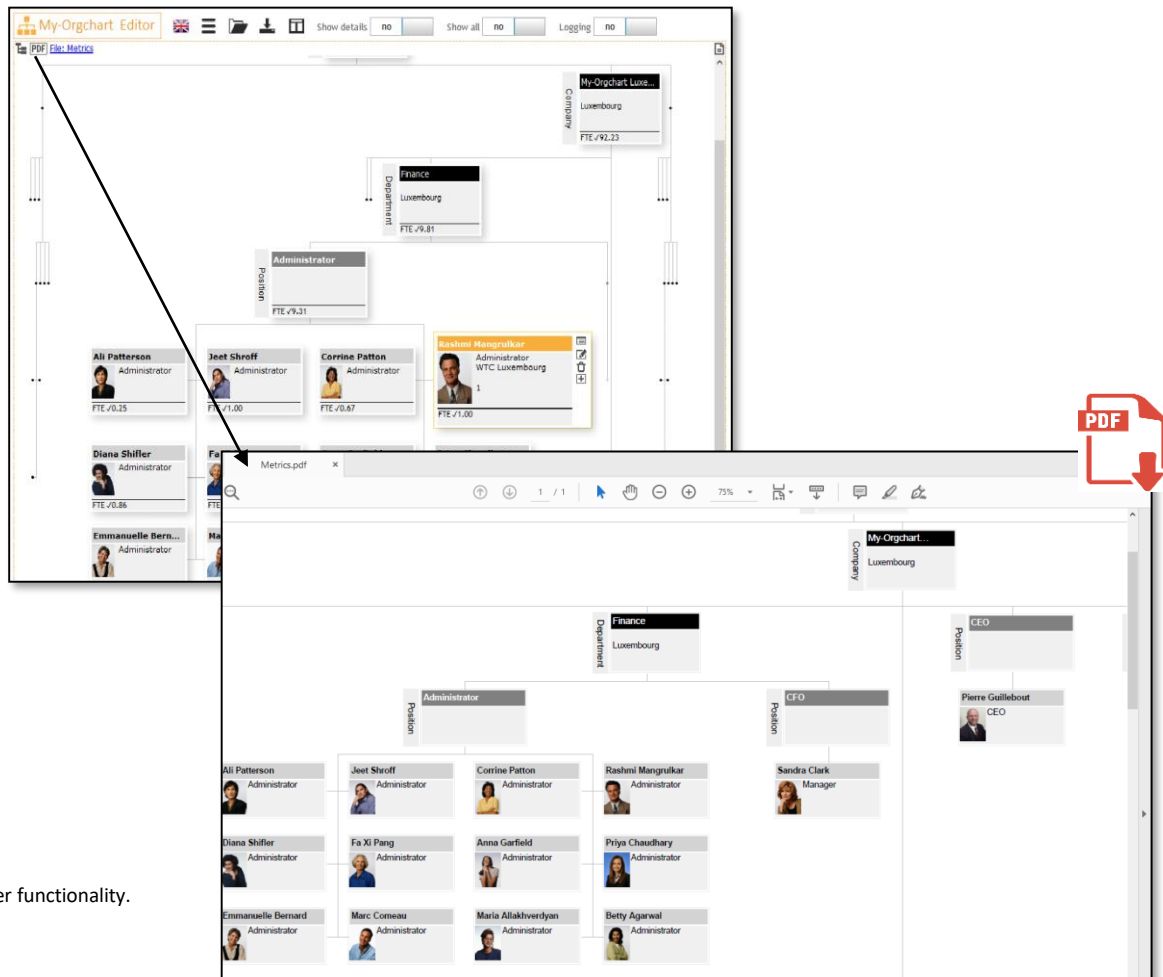
You can save (parts of) the orgchart in PDF-format by clicking on the PDF-icon:  .

The easy way to print an orgchart is to save it in PDF-format. The filename remains the same, but the filetype will change from JSON into PDF. Once in PDF-format you can print the file.

A few remarks:

- Only the visible boxes, will appear in the PDF-files. Hidden boxes will not appear.
- Boxes are only saved in default format.
- Pop-up windows (Details, Metrics, Planning, Reports, etc) are not included in PDF.

PS: Once in PDF-format the file is no longer within reach of the Viewer functionality.



Save as JSON

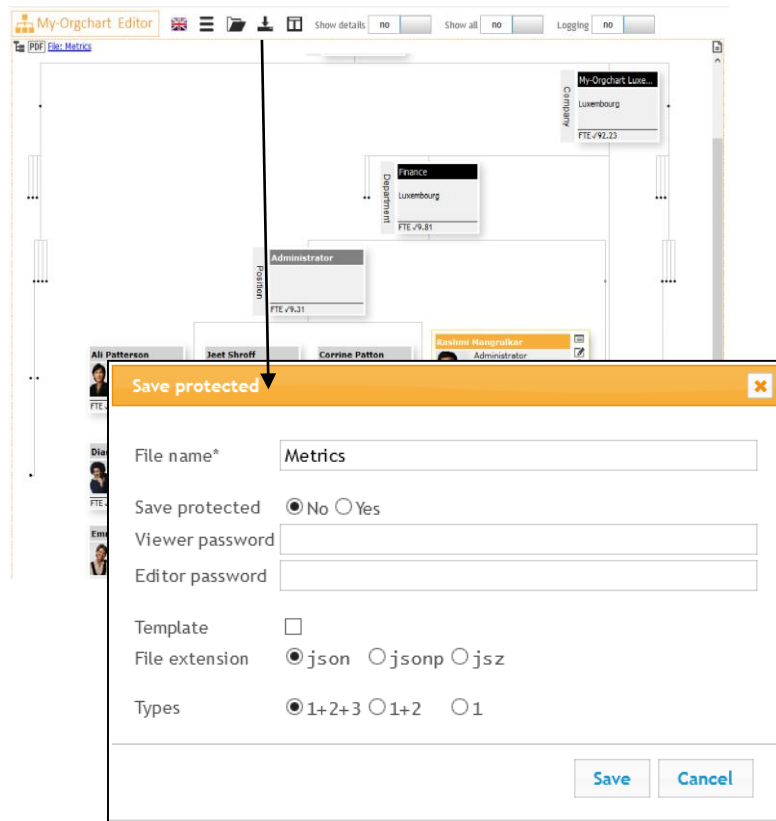
You can save (parts of) the orgchart in JSON-format by clicking on the SAVE-icon: . The filename remains the same, and the filetype will be JSON. A saved JSON will appear in the Download-area.

Password:

- You can add passwords to your JSON-file to protect against unauthorized file opening.
- When passwords are added, the JSON-file will be encrypted.

Conditional Save:

- Instead of saving all boxes (1+2+3), you can also decide to save only type 1 and 2 (1+2), only type 1 (1), or no boxes at all (Template).



PS:

In JSON-format the orgchartfile is within reach of both the Viewer and the Editor.

The file extension is default JSON, but JSONP and JSZ can also be chosen.

