



**OrgPublisher Search and Group**

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## Search and Group

OrgPublisher's Search and group function is the workhorse behind reporting and data analysis. Searches can be single or multi-criteria (Boolean). Search criteria are stored as a Group. As your chart data is refreshed,

## ***How to Use Group Results***

If a record meets the criteria stored in a group, then that record is a group member. Group membership does the following in the organizational chart:

- Counts members in a group
- Rolls up summaries for members of a group
- Lists members of a group
- Filters the chart to display selected group members – or “spotlights” the group member boxes
- Creates conditional position types based on group membership
- Conditionally formats background areas in group member boxes using Advanced Box Layout Editor
- Assigns and displays group icons in group member boxes
- Graphs charts based on group membership
- Filters the 9 Box Layout for group members only
- Sets security based on group membership
  - Restricts access to published chart functionality
  - Authorizes access to Organizational and Succession Planning charts
    - Restricts access to areas of planning charts

## Search

You can search any data that a user is authorized to see and that has been defined as "searchable." Multiple criteria can be applied to filter the data to the desired results. For instance, a single criterion search might identify all employees hired after 1/01/2009. A second criterion might include the people hired after 1/01/2009 and how many of those employees work in a specified state.

Chart administrators have the option to provide many search tools for users. OrgPublisher has features to improve accuracy of the search results which are established by setting the default **Search options**.

## Search Options

Chart administrators set the default search options for viewers of the published chart and control what end users can see and the information which they can access through searching. To define searching settings in the published chart, select **Options** in the menu bar, select **Search options**, and then **Use Advanced Search View**.

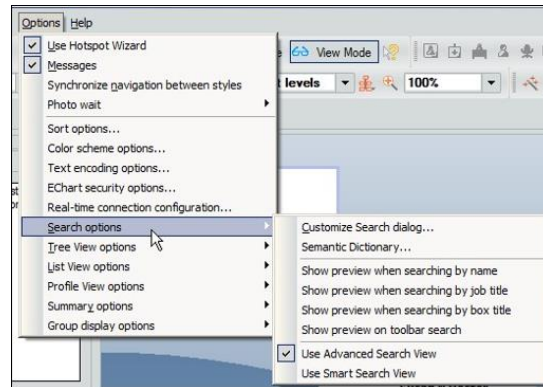


Figure 1.

## Customizing the Search Dialog

You can customize the *Search* dialog options, such tab sequence and names.

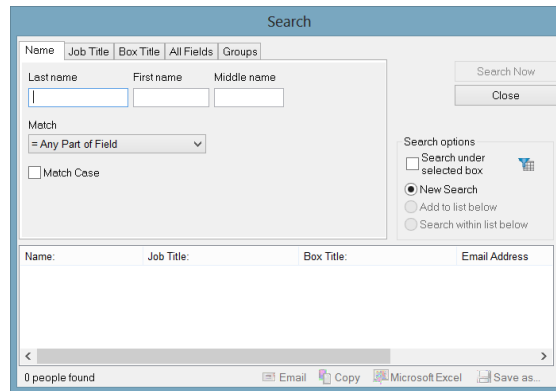


Figure 2.

## Sequencing Search Dialog Tabs

1. Select **Options** in the main menu, then **Search options** and **Customize Search dialog**.
2. Select the item you want to reposition right or left and click **Move Up** or **Move Down**.



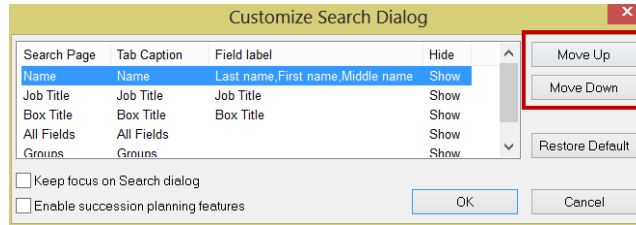


Figure 3.

Clicking **Move Down** moves the selected tab name to the right in the search dialog.

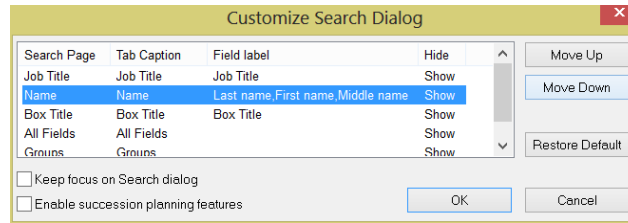


Figure 4.

3. Click **OK** to accept the change and close the dialog. Click **Search** in the toolbar to open the *Search* dialog.

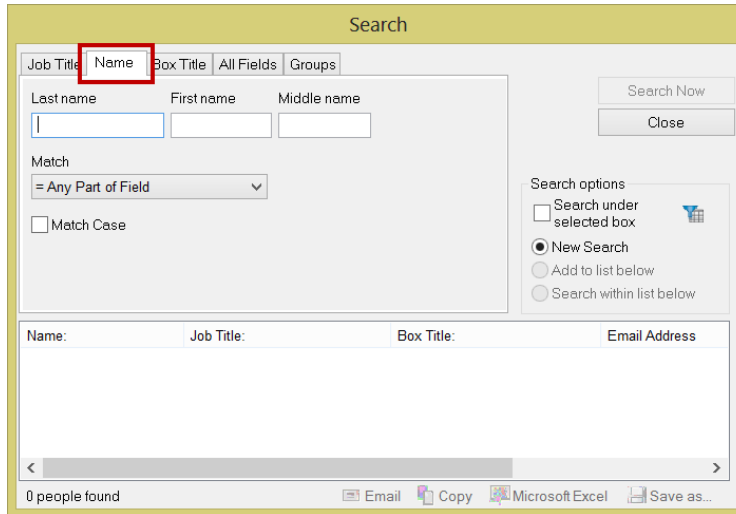


Figure 5.

### Changing the Search Dialog Tab Caption

1. In the *Customize Search Dialog*, select the text in the **Tab Caption** column you want to change and type the new caption.

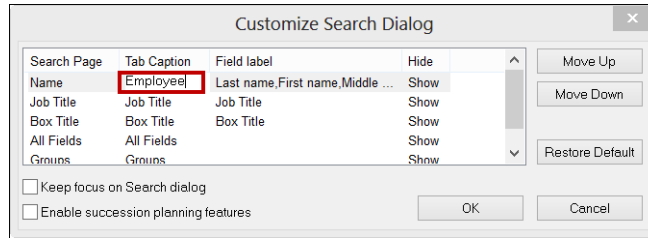


Figure 6.

2. Click **OK** to accept the change and close the dialog.
3. Click **Search** in the toolbar to open the *Search* dialog. The tab now displays the new text.

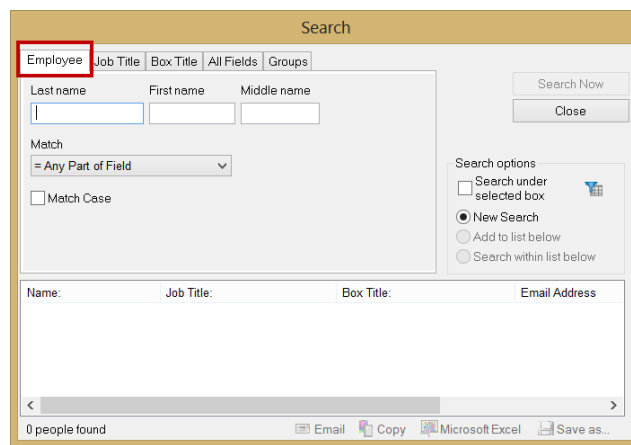


Figure 7.

### Changing the Search Dialog Field Label

1. In the *Customize Search Dialog*, select the text in the **Field label** column you want to change and type the new label text.

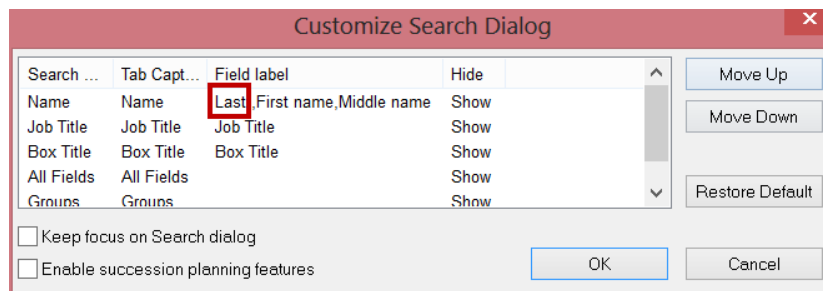


Figure 8.

2. Click **OK** to accept the change and close the dialog.
3. Click **Search** in the toolbar to open the *Search* dialog. The label name displays the new text.

**Previous Label**

**New Label**

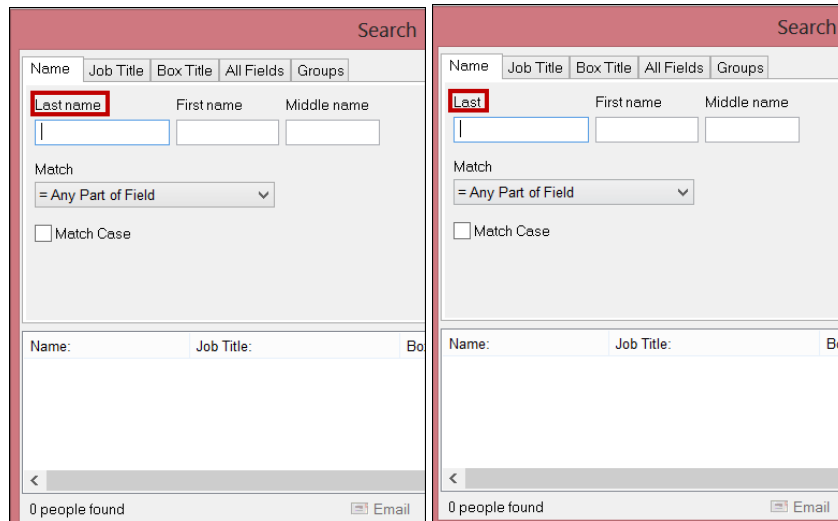


Figure 9.

### Showing or Hiding a Search Dialog Tab

1. In the *Customize Search Dialog*, click in the **Hide** column of the tab you want to modify. The current default is to show all tabs.
2. Select **Hide** and click **OK** to close the dialog.

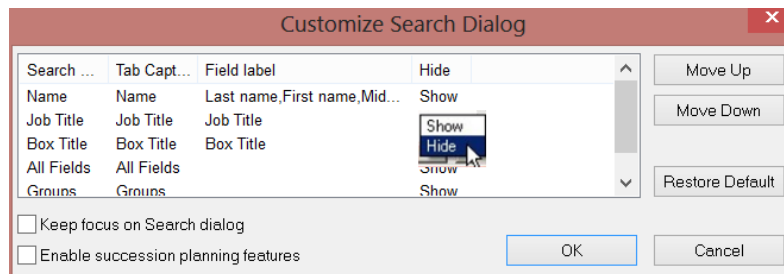


Figure 10.

The *Search* dialog no longer displays that tab.

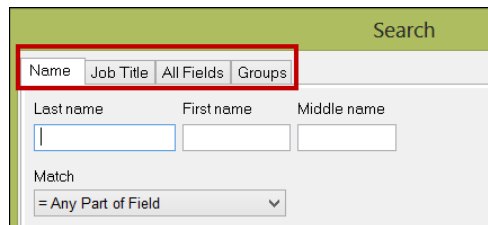
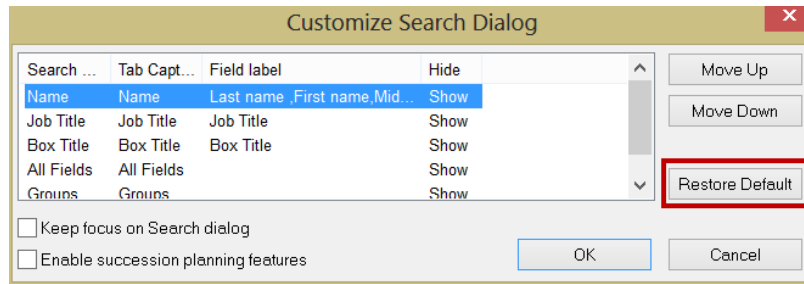


Figure 11.

### Restoring the Search Dialog Default Settings

Once you make changes to the *Search* dialog, you can revert back to the original settings.

Click **Restore Default** in the *Customize Search Dialog*.

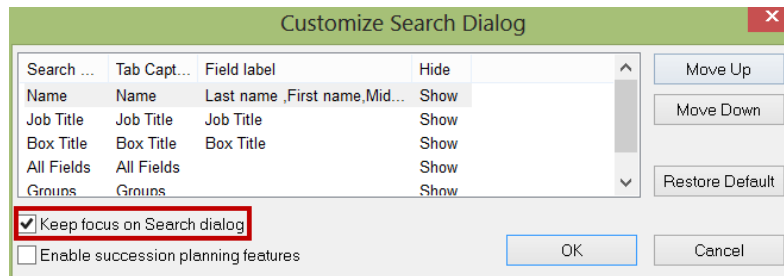


**Figure 12.**

### Keeping Focus on the Search Dialog

This option controls the use of the **Tab** and **Enter** keys when the *Search* dialog is open. This function works both in the OrgPublisher application and in the published PluginX and EChart rich client.

Select the **Keep focus on Search dialog** check box in the *Customize Search Dialog*.



**Figure 13.**

When working in the *Search* dialog with the Focus enabled, you can press **Tab** to move the cursor from field to field. In addition, once you type or select your search criteria which activates the search button, you can press **Enter** to perform the search.

### Enabling Succession Planning Features with the Customize Search Dialog

When working with a chart containing successors, you can enable two standard succession fields, displayed in the **All Fields** tab in the *Search* dialog.

Select the **Enable succession planning features** in the *Customize Search Dialog*.

- **Successor(s) in a box** – enables searching for boxes containing successors.

- **Person successor count** – enables searching for people listed in the chart as successors for a specified number of times.

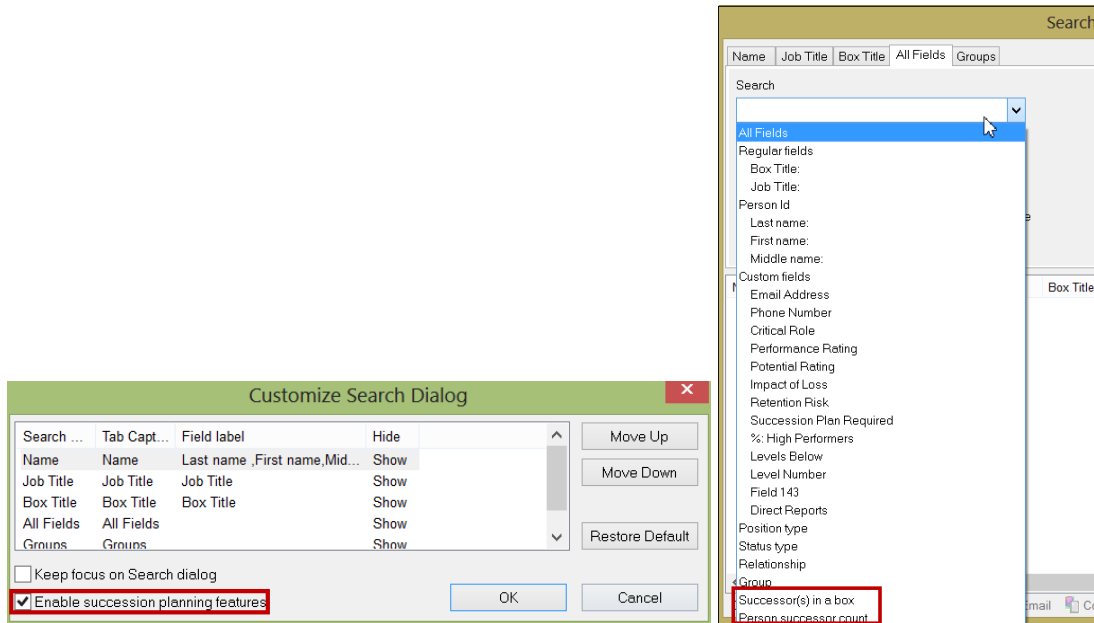


Figure 14.

### Using the Semantic Dictionary

The Semantic Dictionary stores additional translations for values typed as search criteria in all charts created in OrgPublisher. The Semantic Dictionary Editor allows you to add translation/alternate terms for fields in the chart data.

When end users type in any of the defined translation/alternate terms, all records containing any of the translations are returned in the search results.

For example, this Semantic Dictionary contains several translations for the job title, Account Executive, as shown in the figure below.

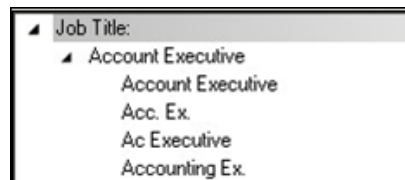


Figure 15.

Using **Acc. Ex.** as the search value and setting the Match to = **Any Part of Field**, search results include records with several of the defined translations.

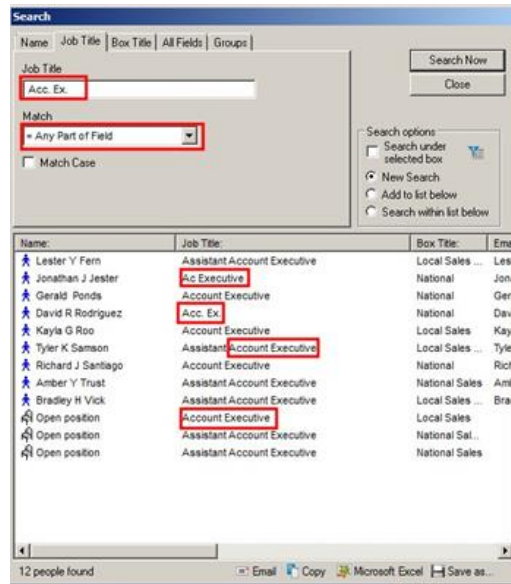


Figure 16.

### Modifying Existing Translation Terms

The translations/alternate terms in the Semantic Dictionary can be added to or changed to meet your needs.

1. Select **Options, Search options,** and then **Semantic Dictionary.**



Figure 17.

2. In the field you want to modify, click the arrow to expand the list of translations.

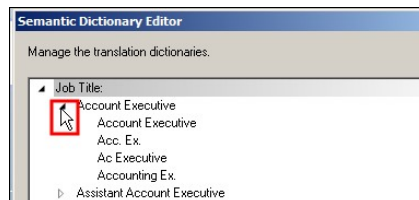


Figure 18.

3. Select the translation term you want to modify and type your preferred text.

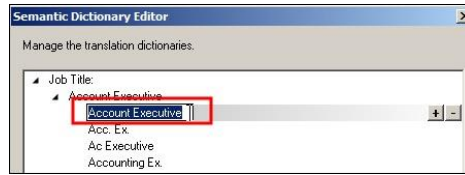


Figure 19.

4. Click the plus sign on the right to add a new value. Select the text **Value**, and type the term you want to add. Press **Enter**.

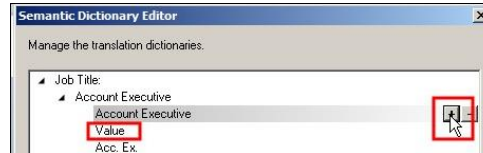


Figure 20.

Future searches will return records with the new translation term.

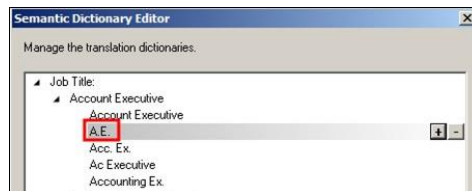


Figure 21.

### Adding New Translation Terms

As you discover data inconsistencies, you may need to add additional translation/alternate terms to the Semantic Dictionary.

1. Select **Options, Search options**, and then **Semantic Dictionary**.



Figure 22.

2. Click the plus sign on the right of the first translation.

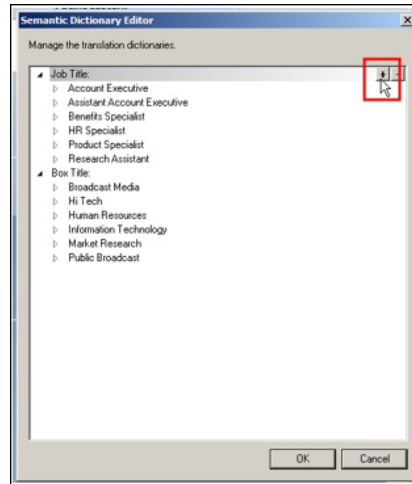


Figure 23.

The **New Field Name** item appears.

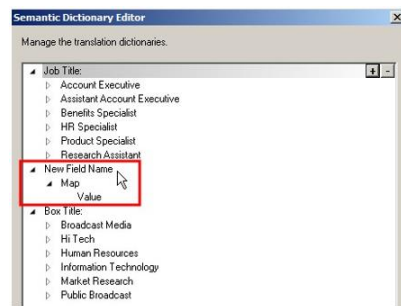


Figure 24.

3. Select **New Field Name** and type a name or select a field from the drop-down list.

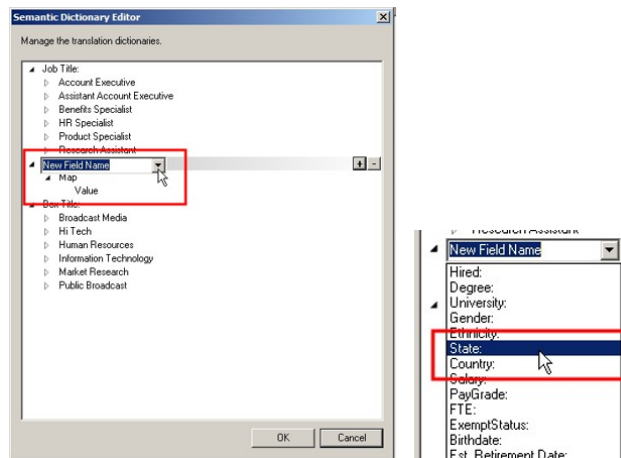


Figure 25.

4. Click **Map** to select the text and type the category.



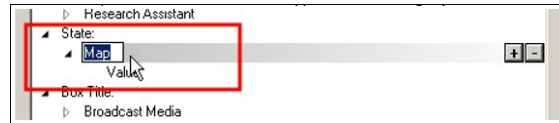


Figure 26.

5. Click **Value** to select the text and type the translation/alternate text.



Figure 27.

6. Click the plus sign to the right to add additional translations/alternate text items.

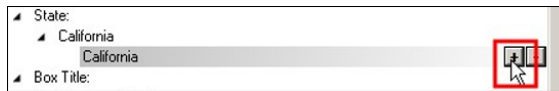


Figure 28.

7. Click **OK** when all required translation are added.

### Deleting Translations

1. Select the **Options** menu, **Search options**, and then **Semantic Dictionary**.
2. Expand the appropriate list and select the translation you want to remove.
3. Click the minus sign to the right of the translation to delete.

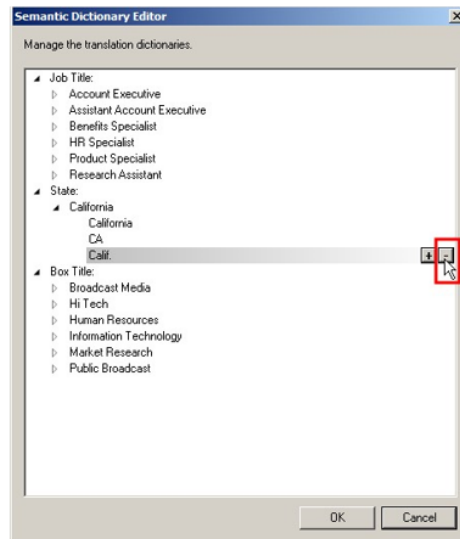


Figure 29.

4. Click **OK** to close the dialog.

## Showing a Preview When Searching

There are four options for showing previews when searching. If one of the items is selected, the preview appears. In the example below, the graphic on the right displays the **Show preview when searching** options.

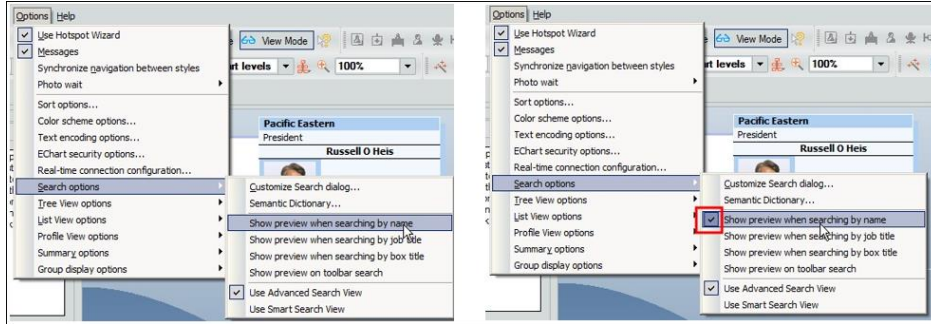


Figure 30.

The show preview options display suggested search criteria as you type. If you see the item you want to search for, click that item to complete the entry and perform the search.

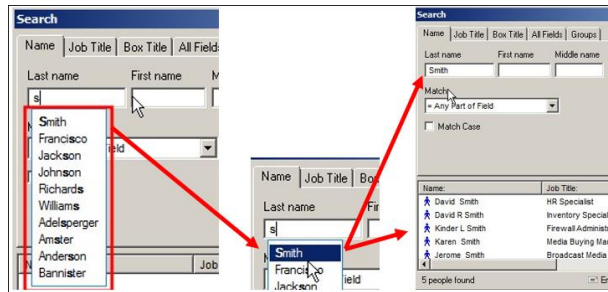


Figure 31.

## Using Advanced or Smart Search View

Two options control the default display of the search panel in the Search view. Click to select the preferred option.

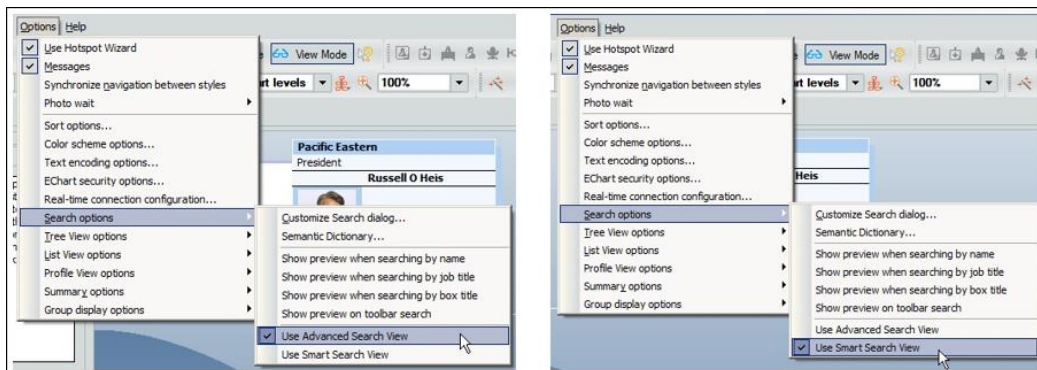


Figure 32.

### Advanced Search View

The Advanced Search option provides you with control over the fields searched, the method used for matching, multi-criteria searches, and limiting the search to start at a specific chart box.

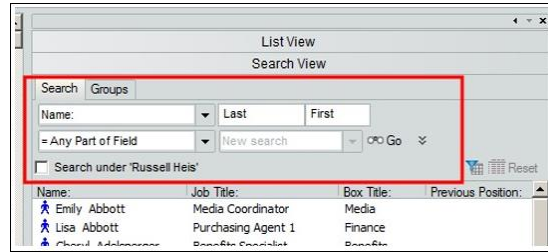


Figure 33.

### Smart Search View

The Smart Search option restricts the search to last name only.

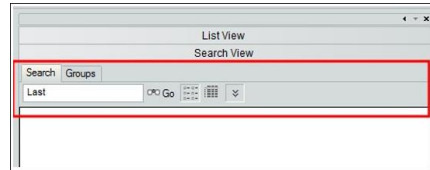


Figure 34.

### Switching Between Advanced and Smart Search Views

You can switch between the Advanced and Smart search options by selecting the toggle button in the current view.



Figure 35.

### Providing Suggested Search Values

In many cases there are fields with a finite set of search options. As chart administrator you can provide suggested values and limit the end user to searching only against these values.

1. Select **Data** from the menu then **Custom field properties**.

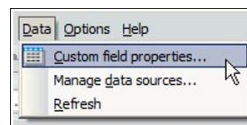


Figure 36.

- Locate the field, click the record to select it and then click **Search Properties**.

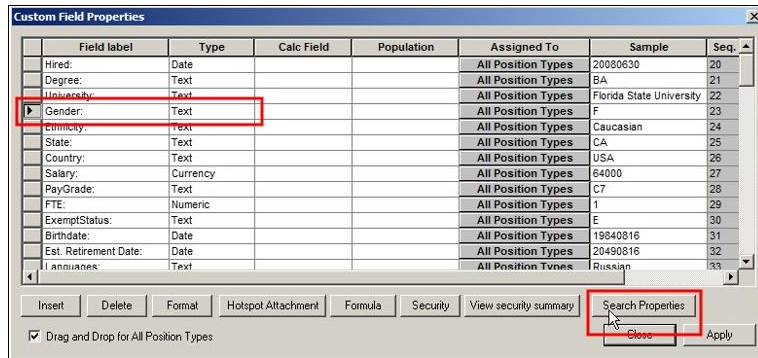


Figure 37.

Select the **Allow this field to be searchable** check box.

- Click **Create selection from field values**. A list of all possible values in the current data feed displays in alphabetical order.
- Select the **Limit searches to these items** radio button.



Figure 38.

Click **OK** to accept your selections and close the dialog.

When the end user performs a search against this field, the values shown with the search properties feature are presented. The example used here is the Gender field with only two values, F or M.

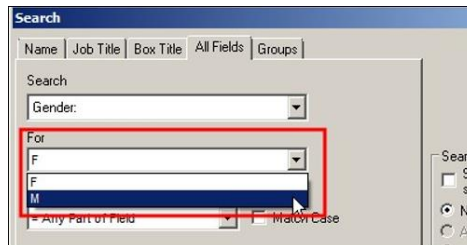


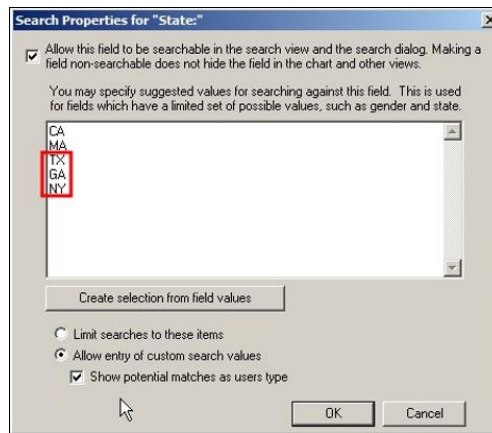
Figure 39.

## Providing Additional Search Values

As the chart administrator, you can provide set values for a field and still give the end user the option to type in additional values for a search.

1. Select **Data** from the menu the **Custom field properties**.
2. Locate the record you want to modify, click to select it and then click **Search Properties**.
3. Select the **Allow this field to be searchable** check box.
4. Click **Create selection from field values** to display all current values for the field.

In the sample below, TX, GA, and NY were entered manually.



**Figure 40.**

5. Click **Limit searches to these items** or **Allow entry of custom search values** radio button. The latter option gives the user the suggested values but also allows typing of other terms.
6. Select **Show potential matches as users type** check box to supply the suggested values to save time typing. For instance, an "N" is typed in the search field and "NY" appears in the field.

## Modifying the Search Results List

You, as the chart administrator, determine what fields of data display in the search results. Results can be managed for both the Advanced and Smart search options.

The Advanced option results display is the same for every style. The Smart option results display is unique for each style.

### Displaying Columns in the Search Results List

1. In the Search View, right-click on any field column heading and select **Show/Hide columns**.

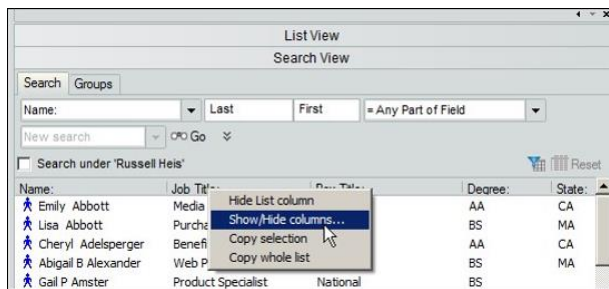


Figure 41.

The Show/hide Fields dialog opens.

2. Click the check box to the left of the column name to clear it and hide the column in the view, or select it to show the column in the view.

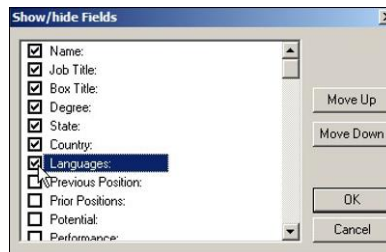


Figure 42.

3. Select a column name and click **Move Up** or **Move Down** to reposition the column in the view.

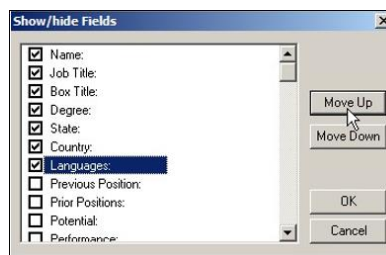


Figure 43.

Click **OK** to accept the changes and close the dialog. In the following example, the column **Languages** has been added to the Search View.

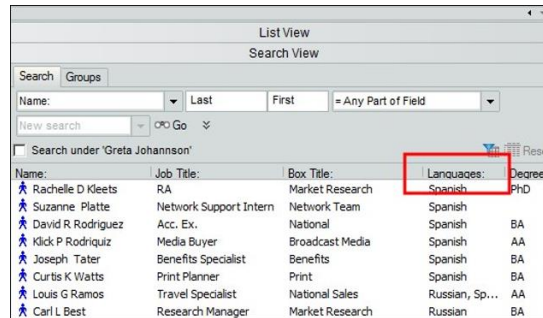


Figure 44.

### Sorting Columns in the Search Results List

You can modify the records sort order in the Search View by clicking on the column heading. If the column was originally in ascending order, click it to sort in descending order. You can change the sort by clicking on another column heading.



Figure 45.



## Searching from the Toolbar

The OrgPublisher toolbar quick search is identified by the **Look for** label, and is available in the application and published PluginX and EChart rich client charts.

### Using Search to Locate a Chart Box

1. Type a single or multiple search word. As you type, suggestions display in a drop-down box below the field.

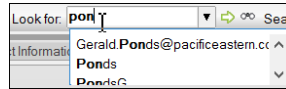



Figure 46.

Select a word if it matches what you are looking for or click Go  to begin the search.

The search results display in the Quick Search Results dialog. You can review the resulting records in the **View List** option or click **View Details**.

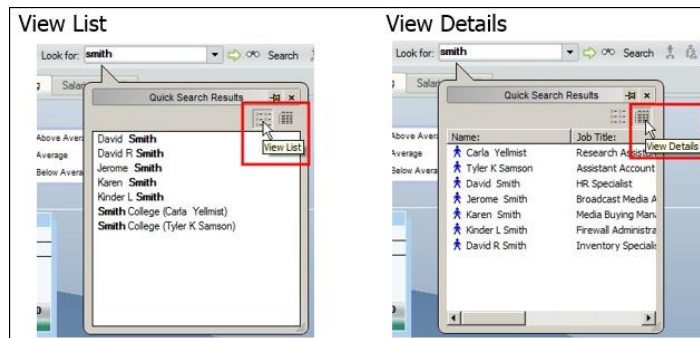


Figure 47.

2. When you see the record you want, select it to navigate to the person's box in the chart.



Figure 48.

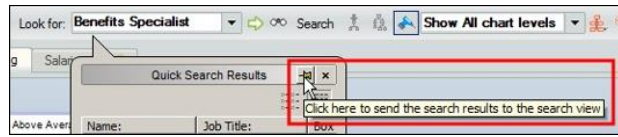
3. Click the **X** in the upper-right corner to close the Quick Search Results dialog.



## Sending Search Results to the Search View

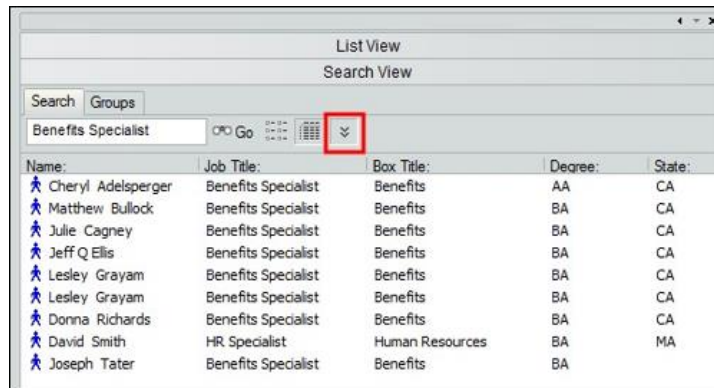
You can send the search results to the standard Search View for further details.

Click the pin button in the Quick Search Results dialog to open the returned records in the Search View.



**Figure 49.**

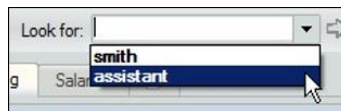
You can toggle to the Advanced Search option to add criteria to the search, send the search results to Microsoft Excel, send an email to the people in the list, etc., by clicking the **Switch to** button.



**Figure 50.**

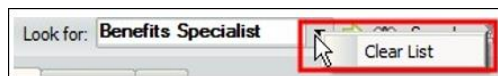
## Reusing a Previous Toolbar Search

You can reuse previous toolbar searches by clicking the drop-down arrow in the **Look for** field.




**Figure 51.**

To clear the list, right-click on the **Look for** field and select **Clear List**.



**Figure 52.**

## Using Single Criteria Search

1. Click the Advanced Search button  Search in the toolbar to open the Search dialog.  
The dialog opens at the **Name** tab. You can select another tab that better fits what you want to find, such as **Job Title**. The **Groups** tab displays the list of group names. You can select a group and click **Search Now** to see a list of the group members.
2. Type the search criteria text.

### Name Tab

1. Type the name, such as **Lastname**.
2. Select the **Match** field logic that best applies to your search, such as **=Any Part of Field**.
3. If applicable, select the **Match Case** check box.
4. Click **Search Now**. Matching records display in the pane in the lower half of the dialog.

## Using Multiple Criteria Search

You can search against two or more fields of data. You can find records that match both criteria at the same time or you can search for one criterion first and then add to that list by searching for the records that match the other criterion.

Examples:

- You want a list of people in California and in Texas. If 50 employees work in California and 60 work in Texas, you expect to see a result of 110 records.
- You want a list of people who work in California, but not in Los Angeles. You get 50 employee records for California, but then you exclude the 12 who work in Los Angeles, resulting in a list of 38 records.

## Searching Within List Below

Typically, when using this function, you search on the broadest criterion first. In the following example, a search of the field "Degree" for all records that start with "M" returned 10 people with a Masters degree.

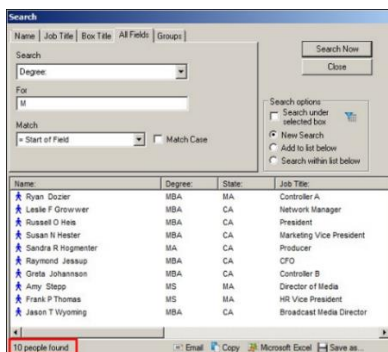


Figure 53.

To add the second criterion, select the **Search within list below** radio button, then change the search choices, looking for people who are located in California.

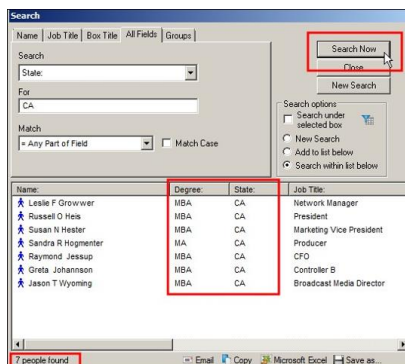


Figure 54.

The results from both searches are now combined. You can save as a group or use any of the search features described in this document.

## Adding to List Below

Typically, when using this function, you search on the broadest criterion first.

1. In the following example, a search of the field "Degree" for all records that start with "M" returned 10 people with a Masters degree.

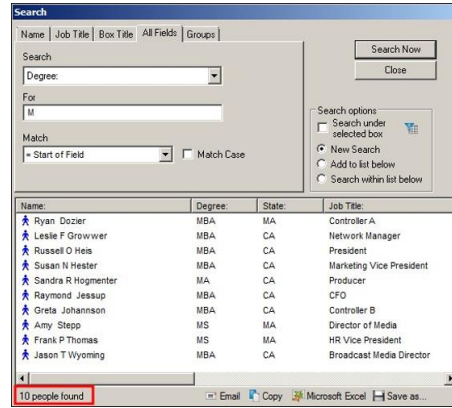


Figure 55.

2. Click the **Add to list below** radio button.

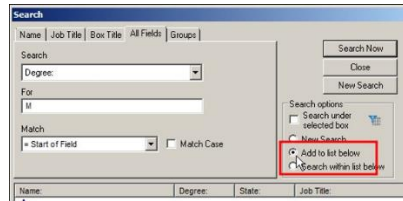


Figure 56.

3. Change the **For** search criteria to "PhD" and click **Search Now**.

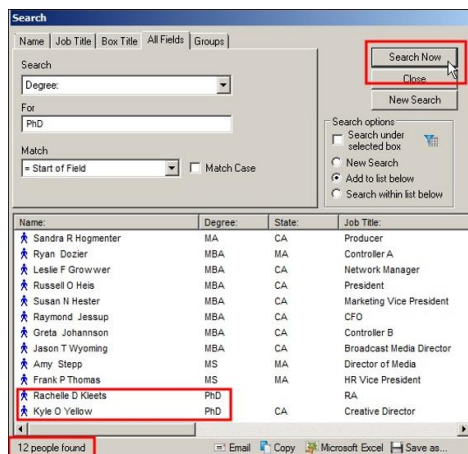


Figure 57.

The results from both searches are now combined. You can save as a group or use any of the search features described in this document.

## Saving Search Criteria as a Group

As the chart administrator, you can set up and save search criteria for your groups in OrgPublisher. Any group you create becomes part of the chart and is available to published chart users.

A saved group doesn't save the actual results list. It saves the search criteria data that is used to make up the group. As HR data is refreshed and charts are republished, the results are based on the current data.

### Creating a Group

1. After performing a search and verifying that your search results are what you want, click **Save as**.

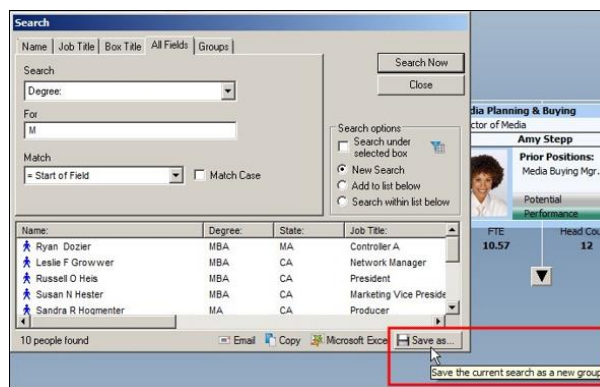


Figure 58.

2. Type the group name you want to use and click **OK**.



Figure 59.

The new group displays in the **Groups** tab.

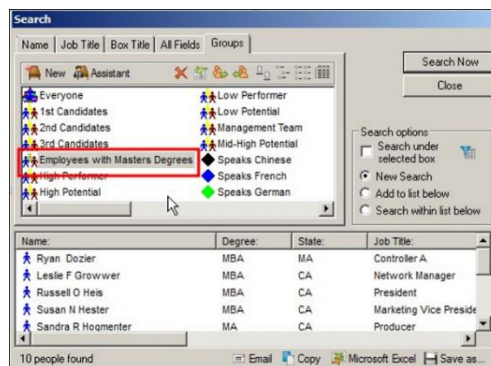
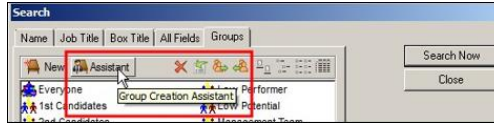


Figure 60.

## Creating Groups Using the Group Creation Assistant

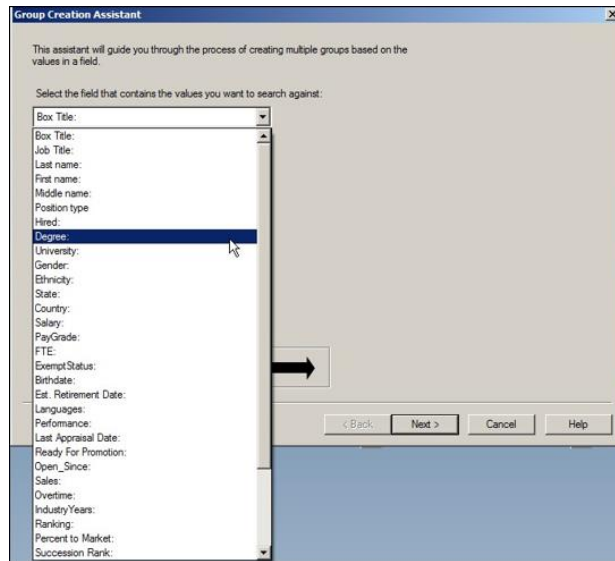
The Group Creation Assistant guides you through creating new groups.

1. Select the **Groups** tab and click **Assistant**.



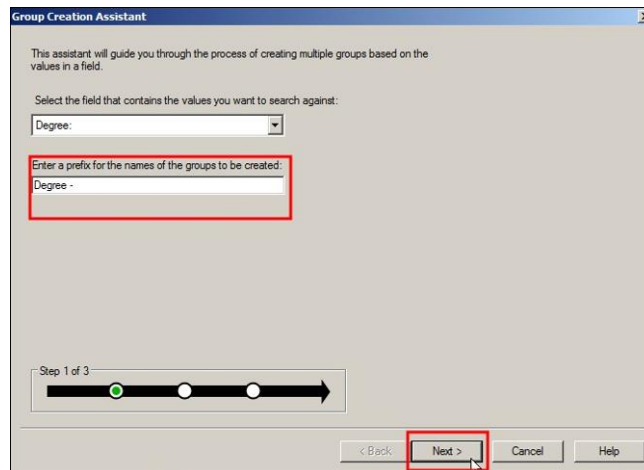
**Figure 61.**

2. Click the drop-down arrow to select the first field you want to search against.



**Figure 62.**

3. Type a prefix if you want to display generated fields together alphabetically and click **Next**.

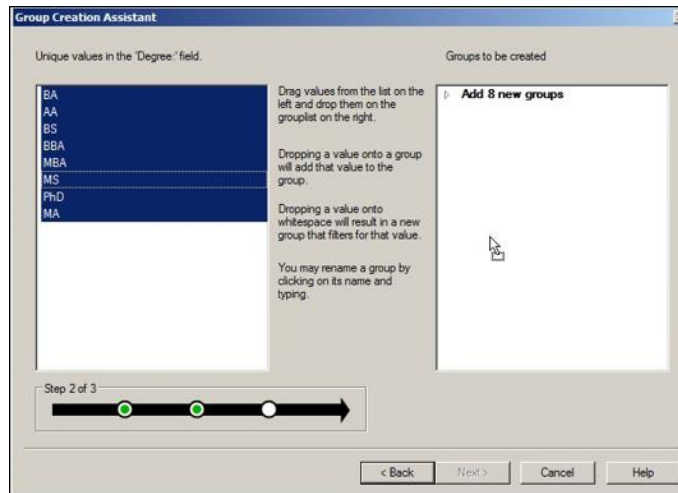


**Figure 63.**

4. The following dialog displays all of the values associated with the selected field. You can create or modify a group using this assistant.
  - a. Create a group for each unique value in the field.
  - b. Combine several values into one group.
  - c. Remove a group by deleting the associated values.
  - d. Remove a value from a group

**Creating a Group for Each Value**

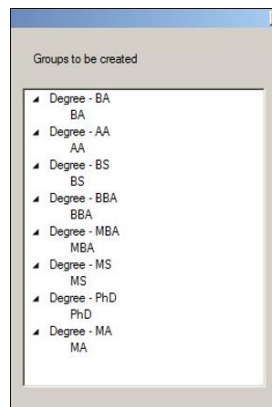
1. Select the top value and hold down the mouse key while dragging to select all value items.



**Figure 64.**

2. Press **Shift** on the keyboard and click.
3. Placing the mouse on the selected list, drag the list on to the right-side pane and release the mouse key.

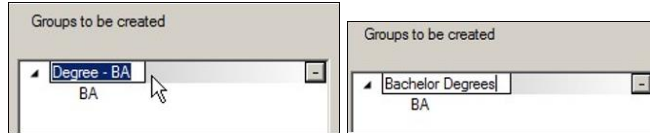
A group now exists for each value, using **Degree** (shown in Figure 64) as the prefix.



**Figure 65.**

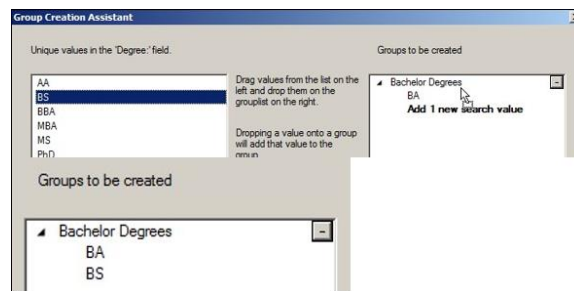
**Combining Values into One Group**

1. Drag the value you want to use into the right **Groups to be created** pane. Drop the value when you see **Add 1 new group**.
2. Click the group name to select the text and type a new name if applicable.



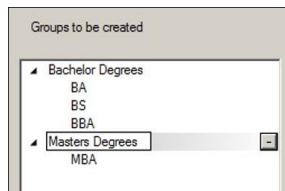
**Figure 66.**

3. Drag any values you want to add and drop them onto the group name when you see **Add 1 new search value**.



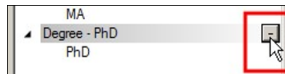
**Figure 67.**

4. Repeat the above steps to add more groups and values.



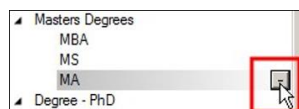
**Figure 68.**

5. To remove a group, click the minus sign to the right of the group.



**Figure 69.**

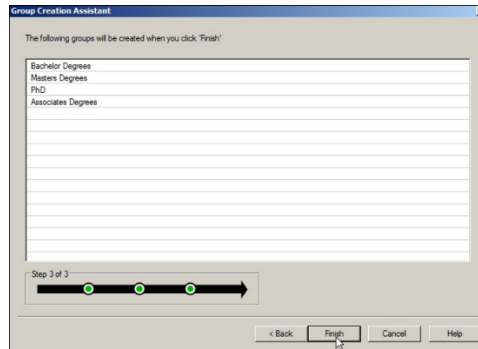
The removed item is returned to the **Unique values** pane on the left.



**Figure 70.**

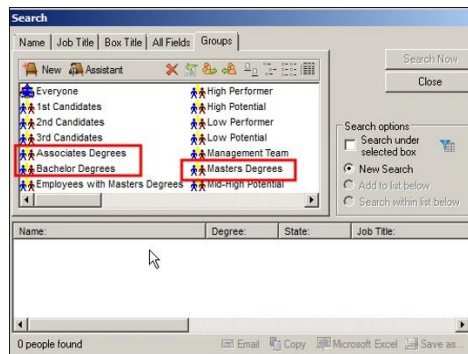


6. Click **Finish**. A list of created groups appears in the Assistant.



**Figure 71.**

The new groups are also available in the **Groups** tab of the Search dialog and Search View.

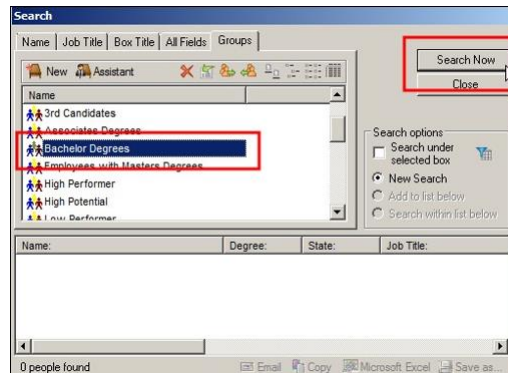


**Figure 72.**

### Searching Within Groups

Searching on a group creates a results list.

1. Select the **Groups** tab in the Search dialog or Search View.
2. Select the group you want.



**Figure 73.**

Click **Search Now**. The results list appears in the lower pane of the dialog.

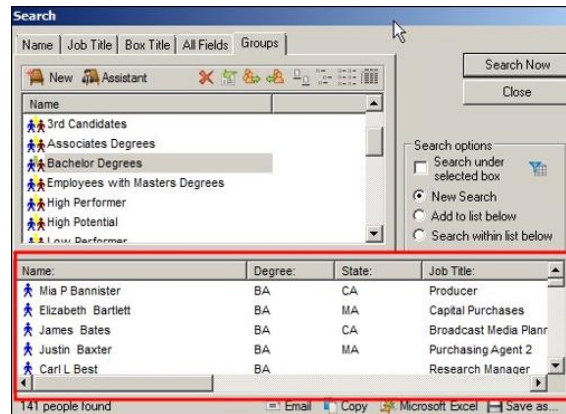


Figure 74.

### Search Dialog Set Group List Display

You can set your group list to display in one of four ways in the Search dialog.

- View Large Icons
- View Small Icons
- View List
- View Details

Select your preference. For example, the following graphic shows the View Large Icons option.

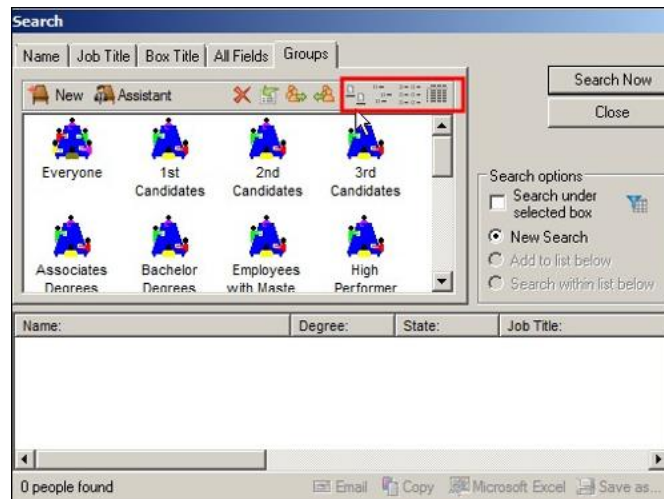


Figure 75.

## Using Search and Group Results

Results found by conducting a search or displaying a group list can be used to communicate and analyze your organizational data. You can use either the Search View or the Search dialog for these tasks, but there are differences between the two.

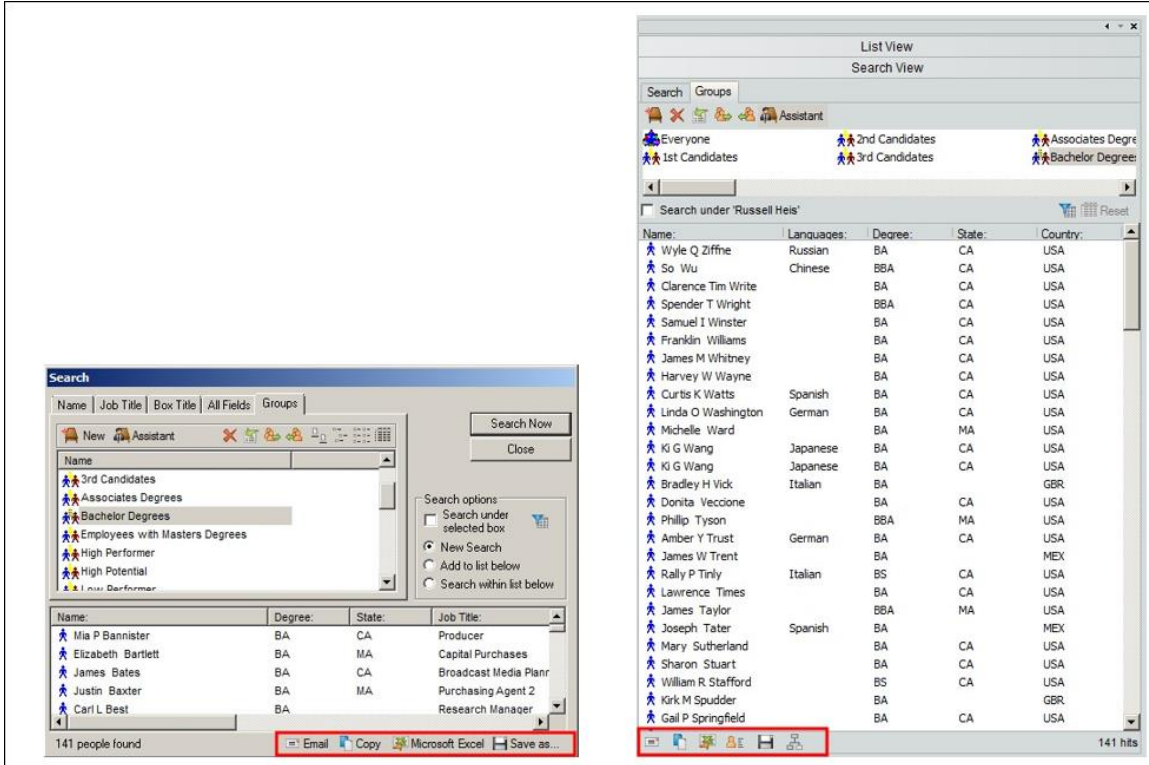



Figure 76.

## Sending Email to Everybody in Group

When your chart is published as PluginX or EChart rich client, and the chart data includes an Email custom field set with data type "Email," the send email button is enabled. A maximum number of messages that can be sent at one time is set by the administrator.

When this button is enabled, the viewer can use a search results list or a group list as the recipients of the email. Click the email button . Your email client launches with the email addresses populated in the **To** field.

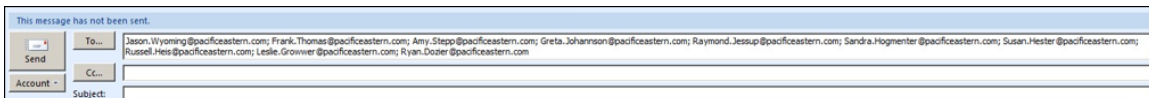



Figure 77.


## Copying the List to Clipboard

Copying the results or group list to the clipboard makes the list available to paste into any Windows based application. Availability of this feature is determined by the chart administrator when publishing to PluginX or EChart rich client.

When this button is enabled, the viewer can use a search results list or group list as the content to copy. Click the copy button . Open a Windows application and paste the results.

## Opening Search Results in Microsoft Excel

If enabled by the chart administrator, search results or a group list can be set to Microsoft Excel if the chart is published to PluginX or EChart rich client.

Click the Excel button  to send the list to Microsoft Excel.

## Including Search results in Profile View

Available in OrgPublisher Premier, this button sends search results or group list to the side-by-side Profile View.



Click the Profile button . If the list contains more than 6 records, a message displays indicating that only the first six records have been sent to the Profile View.



Figure 78.


You can select the next six records and continue to add additional records to the Profile View. Click the Pin button  to pin the records into the Profile View.



Profile View						
6 pinned						
Name:	Jason T Wyoming	Leslie F Growwer	Raymond Jessup	Russell O Heis	Ryan Dozier	Sandra R Hogment
Job Title:	Broadcast Media Director	Network Manager	CFO	President	Controller A	Producer
History						
Previous Position:	Producer	Network Administrator	Controller A		General Ledger Manager	Writer
Prior Positions:						
Industry Years:	13	23		20		15
Dates						
Birthdate:	04/09/1952	07/19/1971	08/29/1961	05/30/1954	07/19/1965	12/10/1947
Hired:	06/06/2001	01/15/2002	12/01/1995	03/05/1996	01/15/2002	06/01/2000
Est. Retirement Dat	04/09/2017	07/19/2036	08/29/2026	05/30/2019	07/19/2030	12/10/2012
Est. Yrs. to Retire:	8	27	17	10	21	3
Education						
Degree:	MBA	MBA	MBA	MBA	MBA	MA
University:	Duke University	Stanford University	Stanford University	Harvard University	Harvard University	UCLA
Salary Information						

Figure 79.

## Saving Current Search Results as New Group

You can save the search results as a group by clicking the Save button . Type the name of your group in the Enter a group name dialog and click **OK**.



**Figure 80.**

## Spotlighting Search Results in the Chart

OrgPublisher helps you filter chart boxes in a visual manner, spotlighting members of a search results or group list.

Click the Spotlight button. The members of the results list or group are spotlighted in the chart. Boxes that are not members of the selected list appear faded out.



**Figure 81.**

## Editing Group Attributes

You can edit existing or add additional attributes to any group that you have created.

### Editing Search Criteria in a Group

1. Select the **Groups** tab in either the Search dialog or the Search View.
2. Select the group you want to edit and click the Edit Group Definition button.

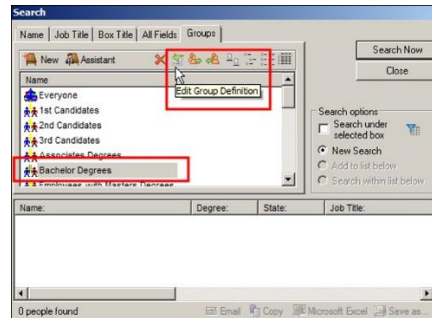


Figure 82.

3. The Group Editor dialog allows you to add or delete attributes of the selected group. Select a criterion and click **Remove**.

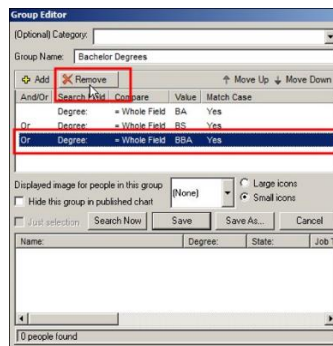


Figure 83.

4. Click **Add** to insert an additional criterion.

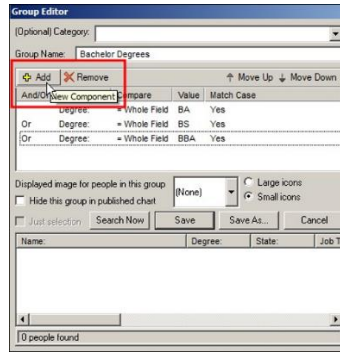


Figure 84.

A copy of the last criterion in the list is added to the components. Click on the **Or** value in the **And/Or** column.



Figure 85.

- **And** states that a record must contain the preceding criteria plus the criterion you are about to add. This reduces the number of records in the results list.
- **Or** states that a record could contain the criterion you are about to add, increasing the number of records in the results list.

5. Click on the value in the **Search Field** column to open the drop-down list of the available custom fields. Select the field you want to add.

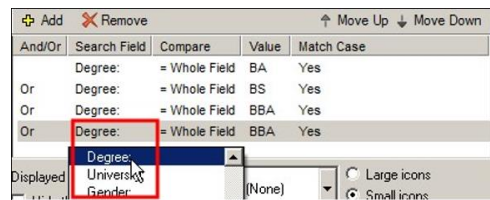


Figure 86.

6. Click on the value in the **Compare** column to display the drop-down list of data match types. Select the match you to search on.



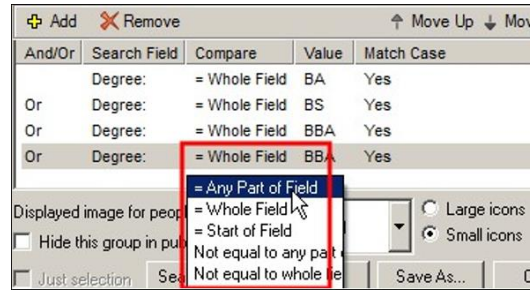


Figure 87.

7. Click in the **Value** field to type the word you want to find.

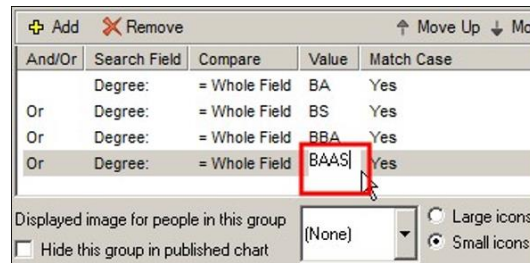


Figure 88.

8. Click the **Match Case** field to display the drop-down list of options for matching. Select the one you want to use.

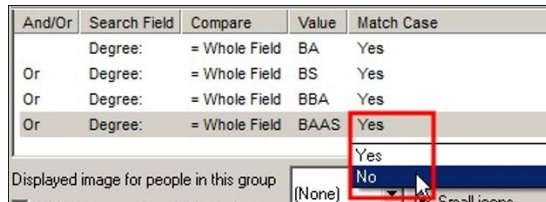


Figure 89.

9. Click **Save** to update the group attributes.

## Modifying the Group Name

1. Select the **Groups** tab in either the Search dialog or the Search View.
2. Select the group you want to edit and click the Edit Group Definition button.



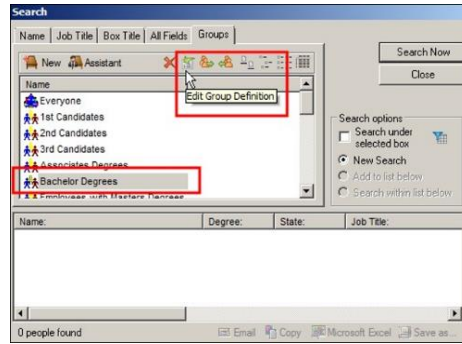


Figure 90.

- Place the cursor in the **Group Name** field and type your changes. Click **Save**.

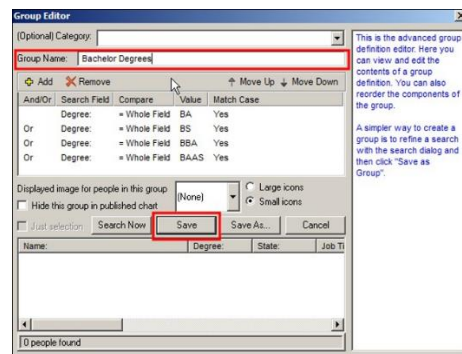


Figure 91.

### Adding a Category to the Group

Many groups can be related and, for display purposes, you may want to categorize and collect them under a main group category.

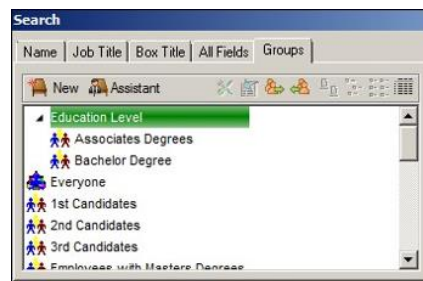


Figure 92.

- Select the **Groups** tab in either the Search dialog or the Search View.
- Select the group you want to edit and click the Edit Group Definition button.
- Place the cursor in the optional **Category** field and type the name.

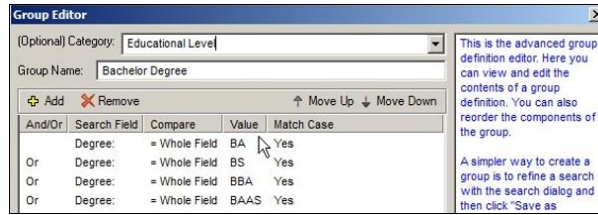


Figure 93.

If categories already exist, click the drop-down arrow and select the category you want to use.

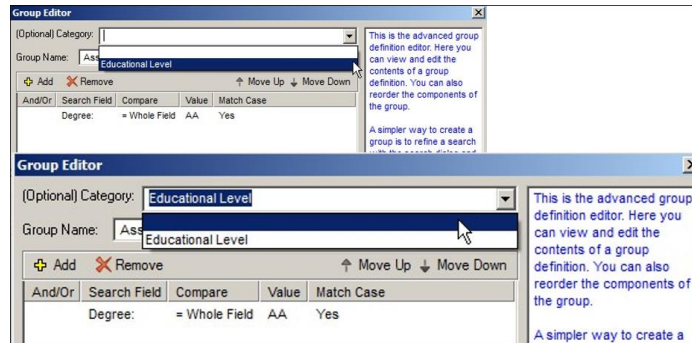


Figure 94.

Click **Save**.

### Removing a Group from a Category

1. Select the **Groups** tab in either the Search dialog or the Search View.
2. Select the group you want to edit and click the Edit Group Definition button.
3. Click the drop-down arrow and select the blank category. Click **Save**.

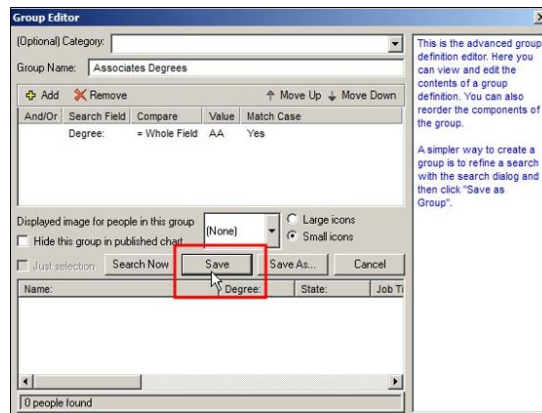


Figure 95.

## Associating an Icon with a Group

You can associate icons with groups as a visualization tool.

1. Select the Groups tab in either the Search dialog or the Search View.
2. Select the group you want to edit and click the Edit Group Definition button.
3. Click the drop-down arrow in the **Displayed image for people in this group** field in the center of the dialog.

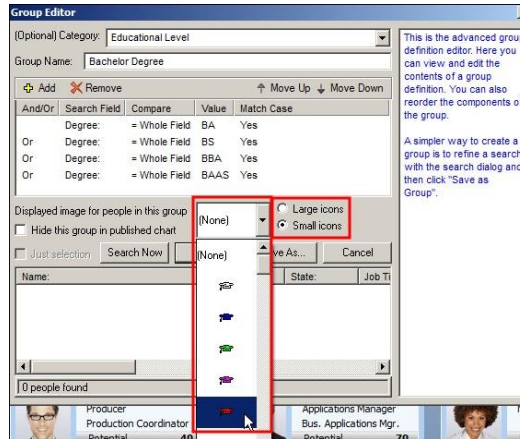


Figure 96.

The group icon displays in several view and dialogs, for instance:

4. **Groups tab:**

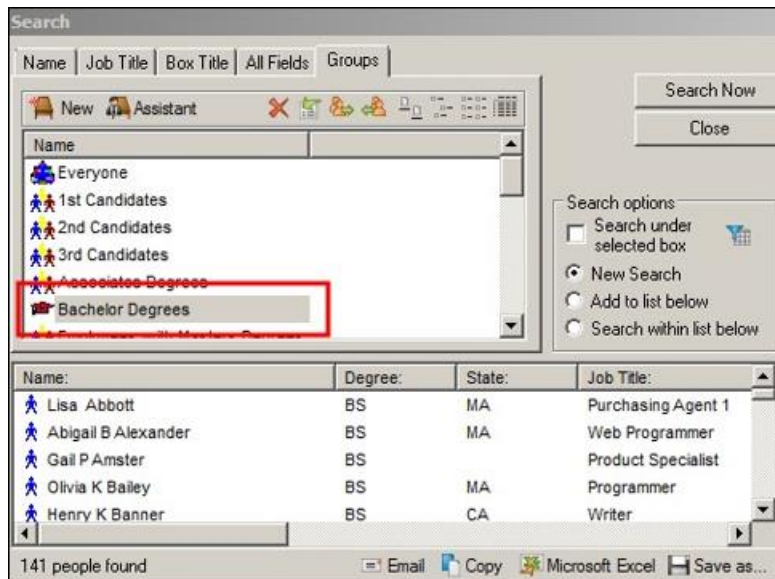
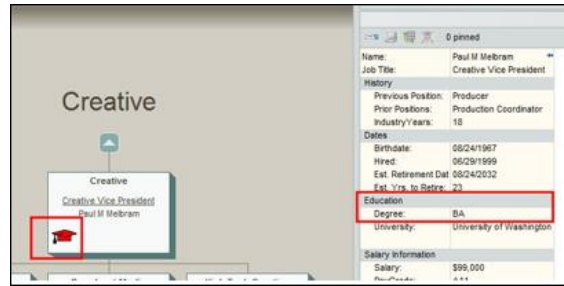


Figure 97.

**Chart box:**



**Figure 98.**

**Filter (Group) View:**



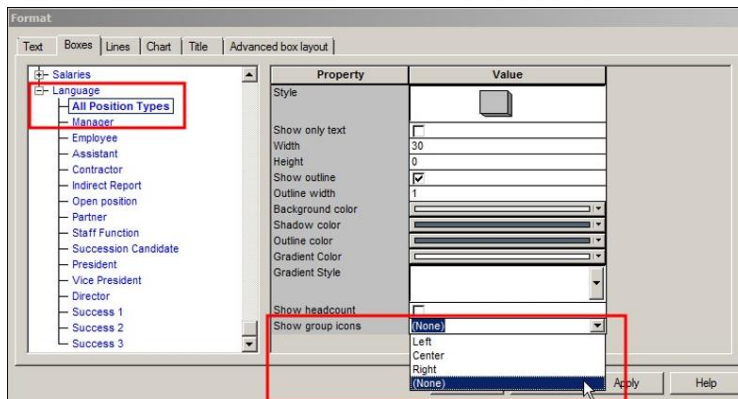
**Figure 99.**

Displaying Group Icons in the Chart Box

If you are not using the Advanced Box Layout Editor to format chart boxes, group icons display automatically in the chart. If you are using the Advanced Box Layout Editor, refer to that document for details on displaying group icons.

You can modify the standard box format to either display or not display group icons.

1. Click **Format** in the menu then **Boxes** in the options list. The Format dialog opens.
2. In the left pane, select the style and position type you want to modify. The example below indicates that **All Position Types** in the Language style have been selected.



**Figure 100.**

- If you elect to display group icons, choose the alignment from the drop-down list in the **Show group icons** field.



Figure 101.

### Hover View Results from a Group Icon

When group icons are shown in the chart, hovering the cursor over the icon displays a list of group members if the administrator enables this feature.

- Verify that the Hover Profile is enabled by clicking **Format** in the menu then **Chart** from the options list. The Format dialog opens at the **Chart** tab.
- Scroll to the bottom of the **Property** list in the dialog to the **Show hover profile** field and select the check box in the adjacent **Value** column.

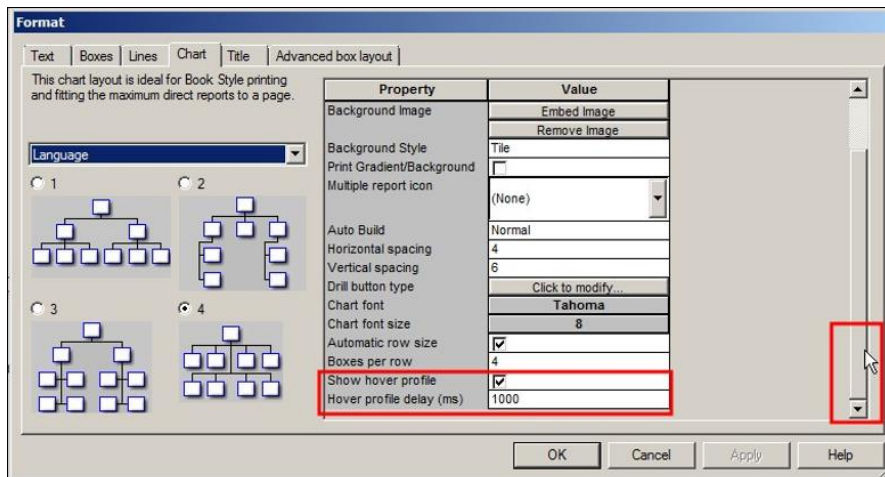


Figure 102.

Click **OK**.

- In a chart box, hover the mouse pointer over a group icon. The Hover Profile displays a list of the group members in a similar format as the List view.

The group name appears in the upper-left corner of the view.

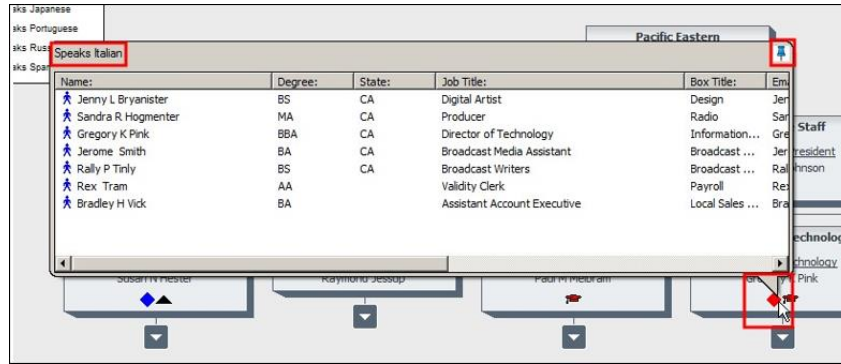


Figure 103.

- Click the Pushpin button in the upper-right corner of the view to open the Search View in order to perform tasks available in the view.

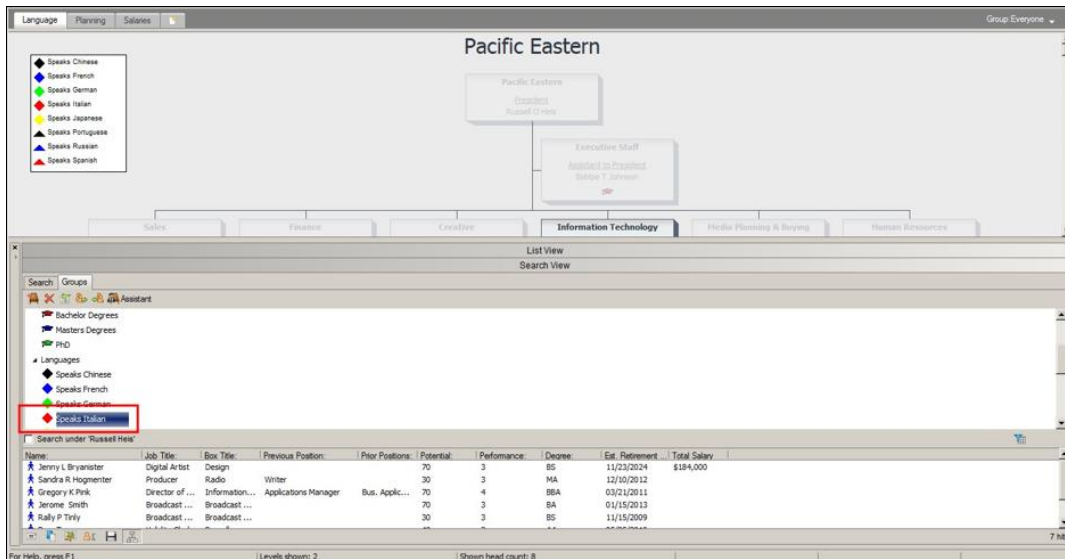



Figure 104.

To see more information about the Hover Profile, review the Views document.

## Hiding a Group in the Groups View

You may not want to display groups in your published chart that were created specifically for securing styles or fields. If you are publishing to PluginX or EChart rich client, you can hide groups from viewers.

- Click Search  in the menu to open the Search dialog, and select the **Groups** tab.



2. Select the group you want to hide and click the Edit Group Definition button.

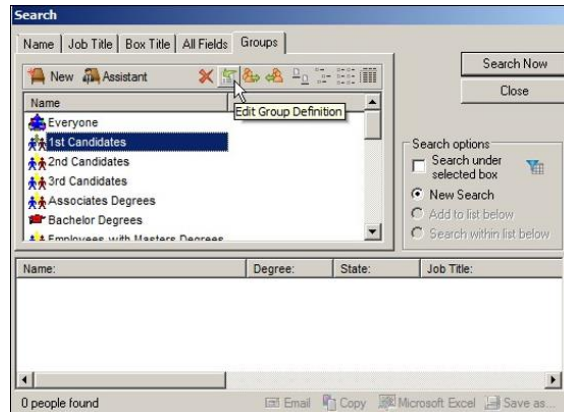


Figure 105.

The Group Editor dialog opens.

3. Select the check box to **Hide this group in published chart**.

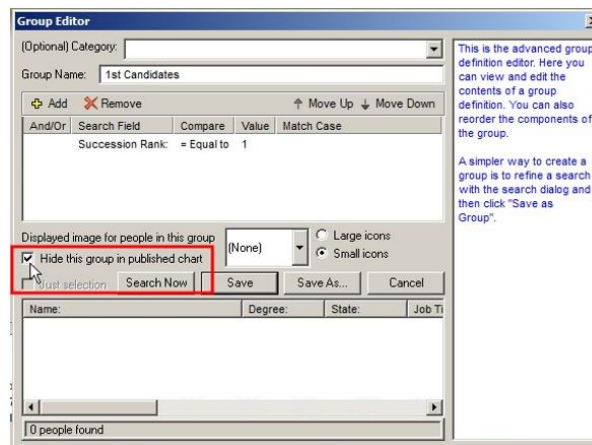


Figure 106.

4. Click **Save** and publish the chart.  
The selected group does not display in the published chart.

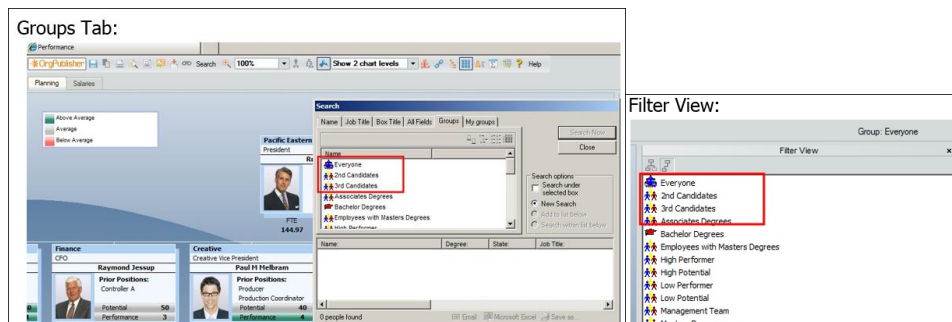


Figure 107.

## Managing Group Attachment

When your chart includes several styles, you can choose to display group icons in some styles but not in others.

1. Select **Options** in the menu, **Group display options**, and then **Manage Group Attachment**.

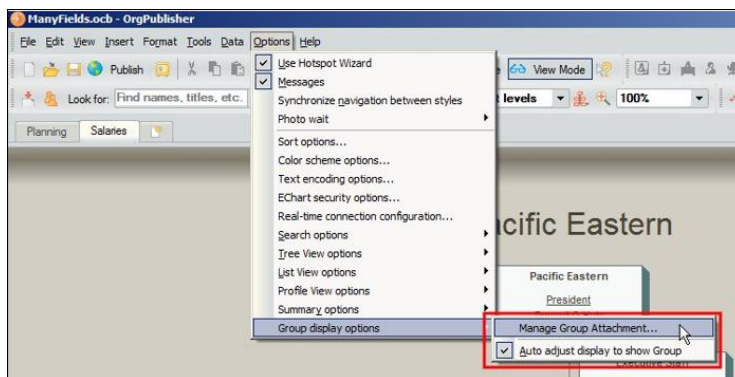


Figure 108.

The Attach Groups To Styles dialog opens with a list of all groups and styles in the chart. The style names display in the top row of the grid.

Group names display in the left column. A check marks indicate the styles in which the group icons appear.

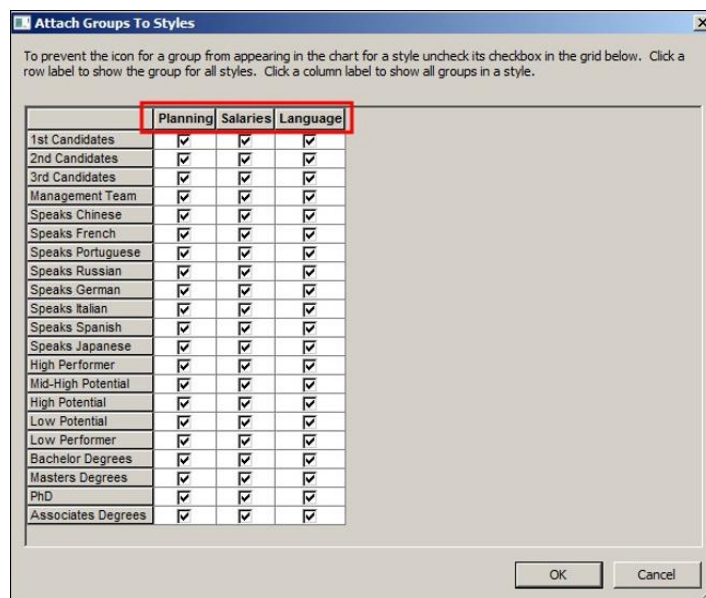


Figure 109.

2. To format the **Language** style to hide all groups except those related to languages, clear all the check boxes associated with non-language groups from the **Language** style column.



The Attach Groups To Styles dialog now looks like the following graphic.

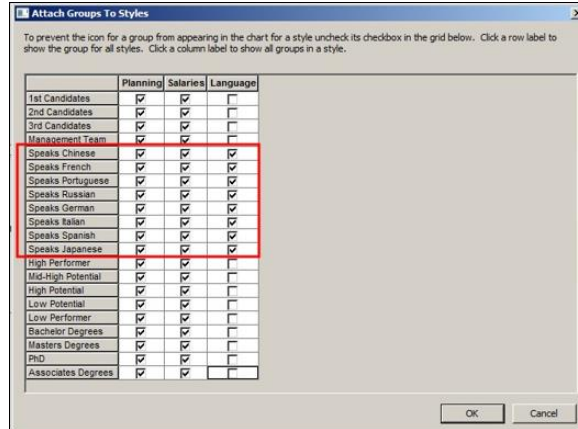


Figure 110.

Click **OK**.

The **Language** style in the chart displays only the icons (as identified in the legend in the upper-left corner) related to languages.

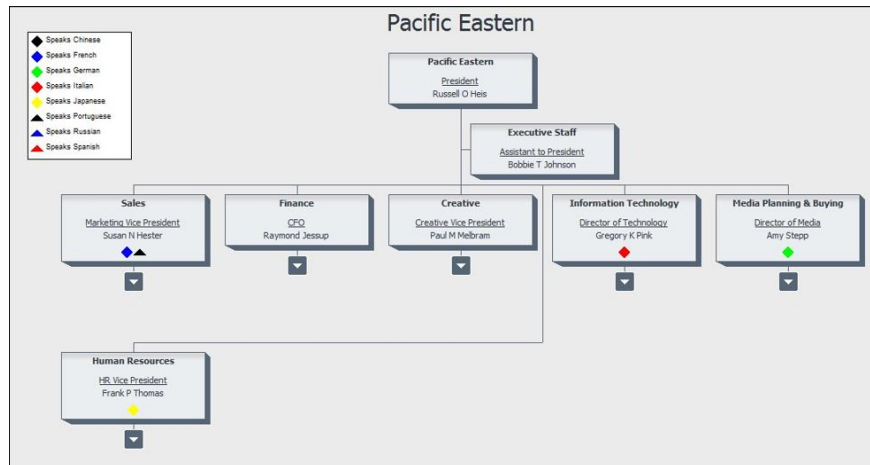


Figure 111.

### Using Quick Selection

1. To quickly remove check marks from selected style column boxes, select a row and click once.

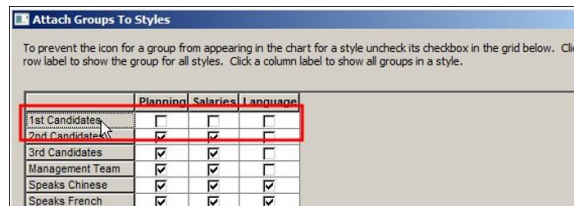


Figure 112.

- To quickly add check marks to empty style column boxes, select a row and click once.

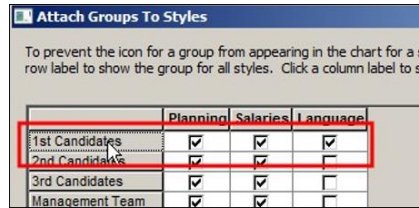


Figure 113.

- To quickly remove or add check marks for all groups to a particular style column, select that column and click.

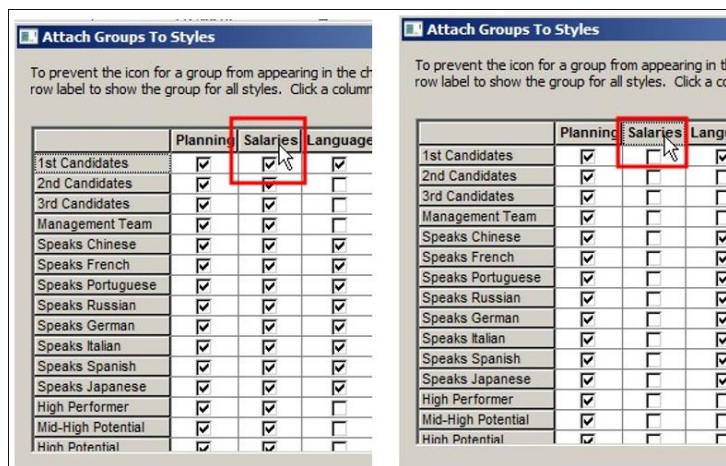


Figure 114.

## Group Features in the Styles Bar

By default, OrgPublisher creates an **Everyone** group that contains all the records in your chart data. In addition, the group Filter View button displays in the Styles bar by default. The chart administrator can choose not to display the group Filter View button.



Figure 115.

1. Right-click on the Styles Bar to display the formatting options.



Figure 116.

2. Move the cursor over **Group Selector button** to:
  - a. **Show Group name always** – by default, **Filter: Everyone** displays in the bar. If other groups exist, a drop-down arrow appears to the right.

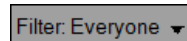


Figure 117.

- b. **Show Group name only when multiple Groups exist** – the **Filter: Everyone** button displays only if there is more than one group in the chart.
- c. **Enable button** – by default this check box is selected, enabling users to view a list of available groups. Clear the check box to disable that function in the published chart.

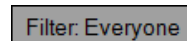


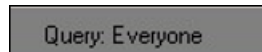
Figure 118.

- d. **Edit label** – allows you to change the button label to something more meaningful to your users.



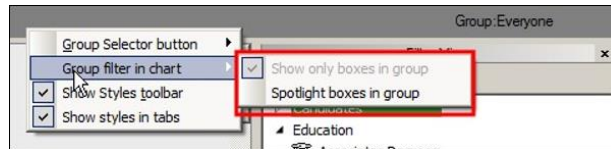
Figure 119.

Type the preferred label name and click **OK**. The new label appears in the Style bar.



**Figure 120.**

3. Hover the cursor over the **Group filter in chart** menu option to view group the spotlighting options.



**Figure 121.**

- a. Show only boxes in group -
- b. Spotlight boxes in group -

The Filter View section contains more detail about spotlighting boxes in a group.

## Filter View

From the Styles Bar, both the chart administrator and end users can display a list of all available groups in a chart. You can also select a filtering option from this list.

### Activating Filter View

1. Click the Filter button on the far-right side of the style bar.



Figure 122.

The Filter View opens. The graphic below indicates that the **Group filter** selection is set to display only the group records in the chart view.

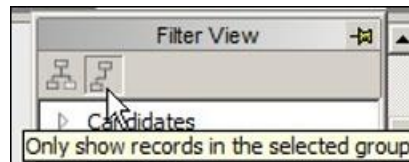


Figure 123.

2. If groups have been assigned to categories, click the category to expand it.



Figure 124.

3. Select the group you want to use.

### Anchoring the Filter View

The chart administrator can anchor the Filter View so that it appears when end users view styles in the chart.

1. Click the Filter View drop-down arrow.

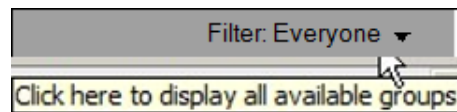


Figure 125.

- Click the pin button in the upper-right corner of the view.

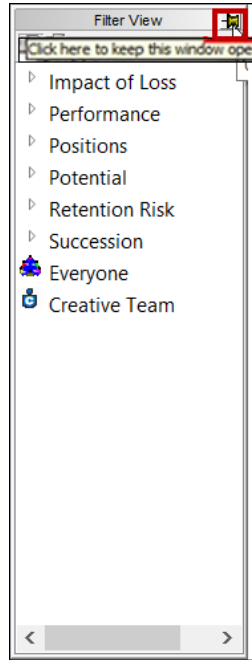


Figure 126.

- Once pinned/anchored, click the **X** in the upper-right corner of the view to close it.

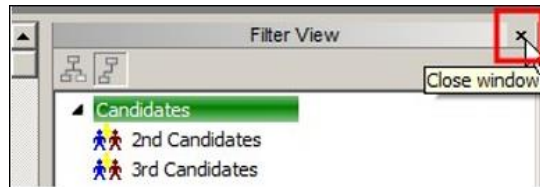


Figure 127.

## Filtering Box Display Using a Group

The Spotighting feature is one way to filter the displayed chart boxes. Spotighting increases the transparency of the chart box containing records that do not meet the criteria of a search or group result.

Spotighting can be enabled from both the Filter view and the Search View. To reset the display to show everyone in the chart, the spotighting feature should be turned off in the Search View, and the Filter View in the Styles Bar should be set to the **Everyone** group.

**Note:** This feature affects the printed output wherever possible. The **AlphaBlend** function is used to create the transparent effect, but it is not available in Microsoft Windows 95 or Windows NT 4.0 and earlier. In those instances, OrgPublisher prints all chart boxes displayed in the Chart view.

### Showing Only Records in the Selected Group

1. If not already open, click the Filter View button and anchor it in the chart by clicking the Pin button.
2. If not already selected, hover the cursor over and click the button to **Only show records in the selected group**.

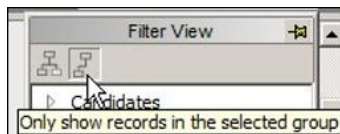


Figure 128.

3. Select the group you want to use. In the following graphic, the **Bachelor Degrees** group is selected. The name, group icons, and any additional information related to the name are hidden in the boxes that do not contain the selected group members.

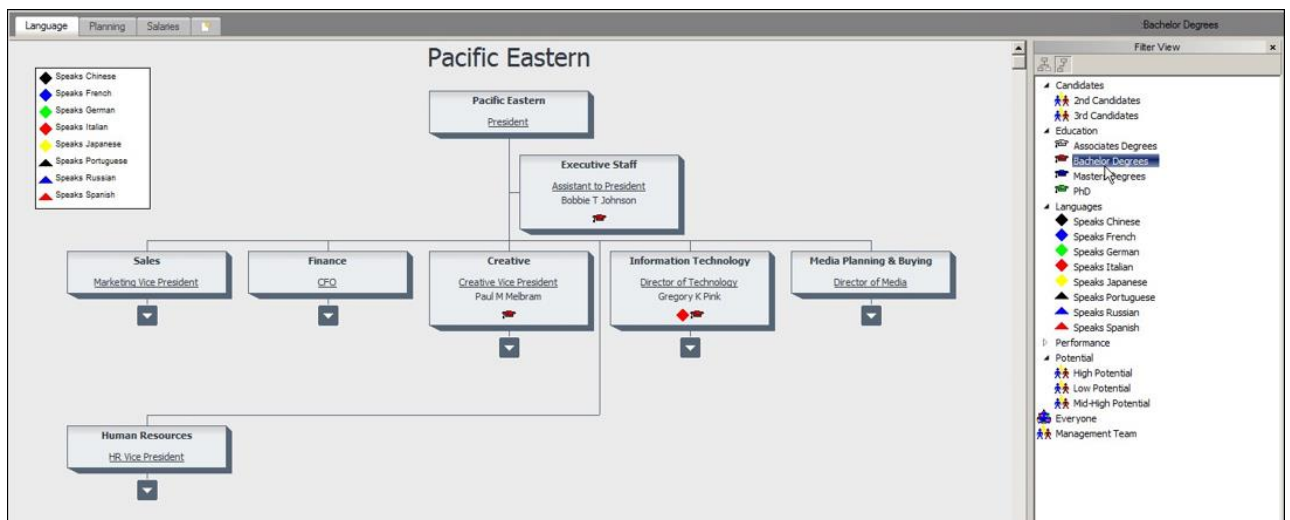


Figure 129.

4. Select the **Everyone** group to restore the chart box display to all boxes.

### Using Spotlighting as Group Filter

1. If not already open, click the Filter View button and anchor it in the chart by clicking the Pin button.
2. If not already selected, hover the cursor over and click the button to **Show records in the selected group.**

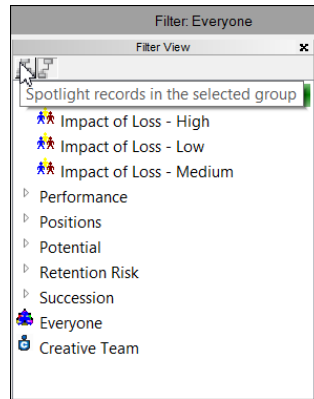


Figure 130.

3. Select the group you want to use. The **Bachelor Degrees** group is selected in the follow graphic. The chart is filtered to spotlight only members of this group.

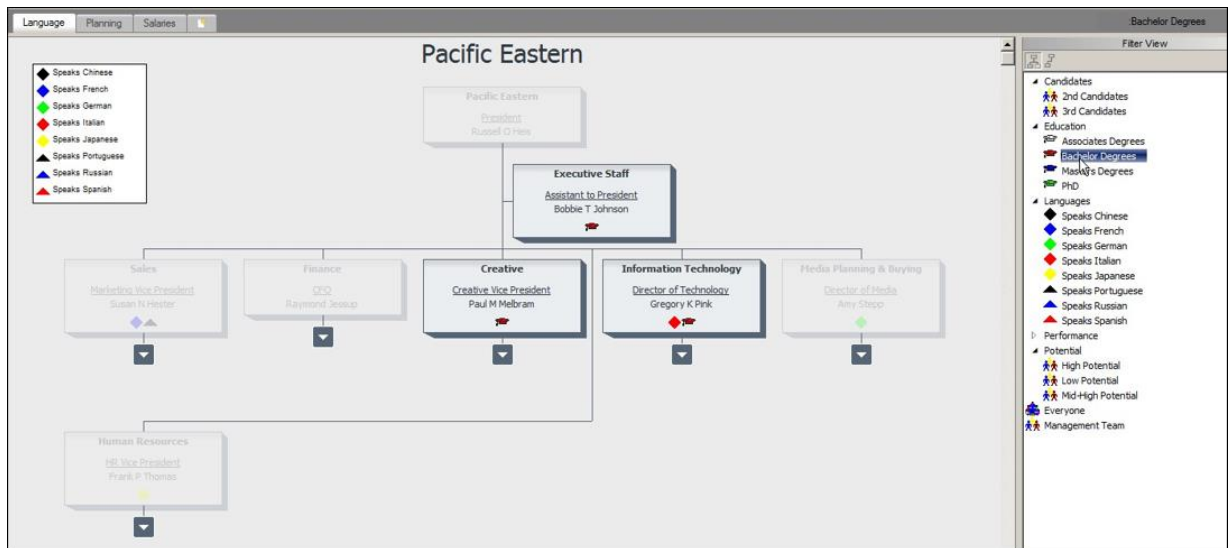


Figure 131.

4. Click the **Everyone** group to restore the chart box display to all boxes.



## Using Spotlighting in the Search View

1. Open the List View, then click the Search View panel bar to open it.
2. Select the **Search** or **Groups** tab.
  - Perform a new search in the **Search** tab
  - Select an existing group in the **Groups** tab
3. Select **Spotlight search results in chart** button.

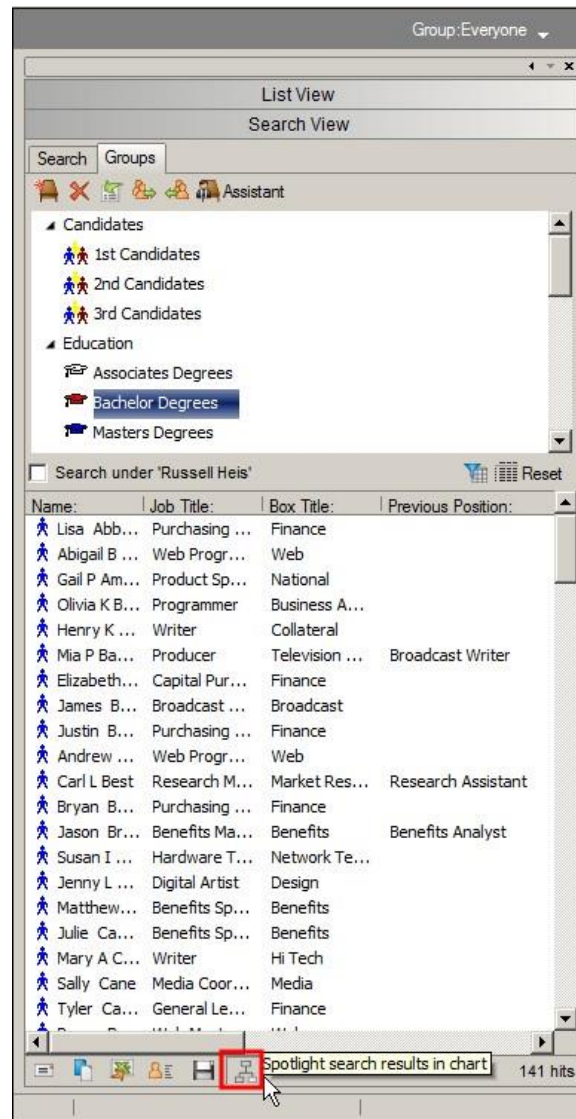


Figure 132.

Boxes containing employees who meet the search criteria are spotlighted in the chart.

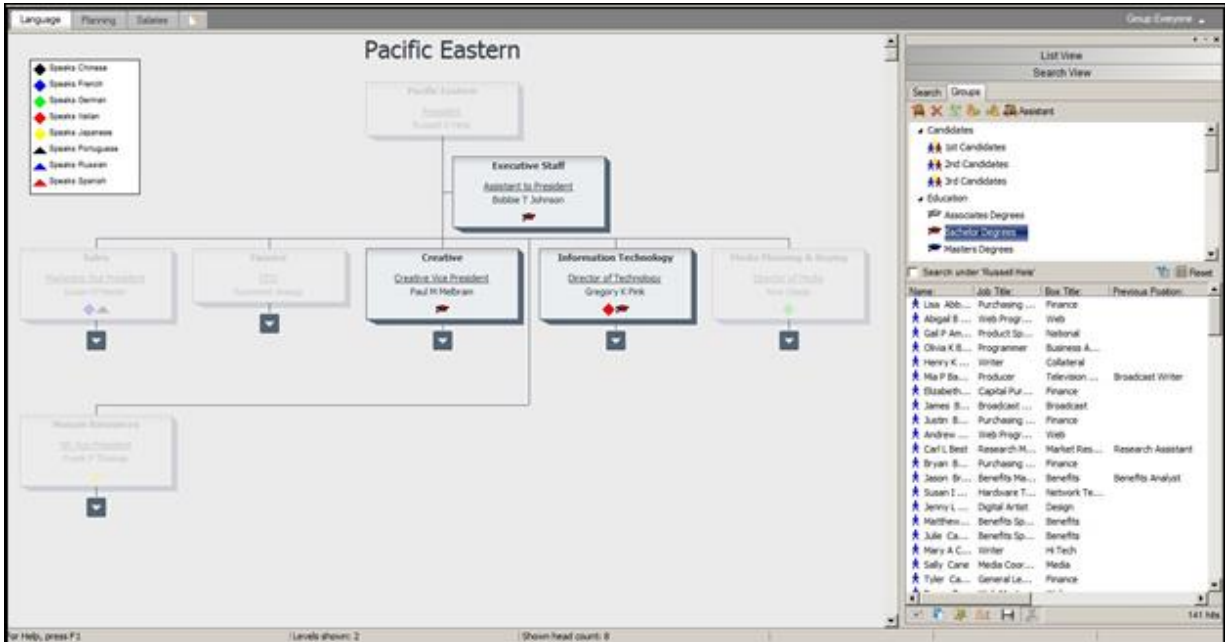


Figure 133.

4. Switch to additional groups or complete additional searches to view the chart with the spotlighting feature.
5. Click **Spotlight search results** again to restore the original chart display.

## Emailing Groups

If an **Email** custom field type is created in the chart, you can use groups as email distribution lists.

### Emailing Groups from the Search Dialog


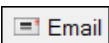
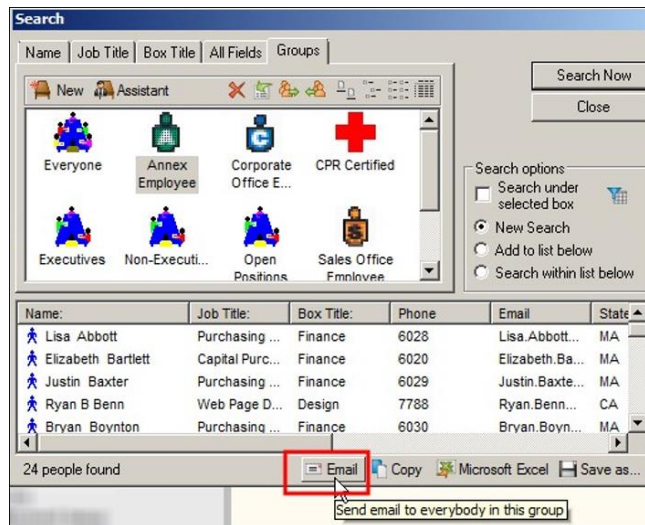
1. Click the Search button  in the toolbar.
2. Select the **Groups** tab when the Search dialog opens.
3. Select a group in the upper display pane and click **Search Now**. The group members appear in the results pane.



Figure 134.

4. Click Email  to launch your email client.



The group member email addresses appear in the **To** field.

**Note:** The chart administrator, during the publishing process, sets a maximum number of records allowable at one time.

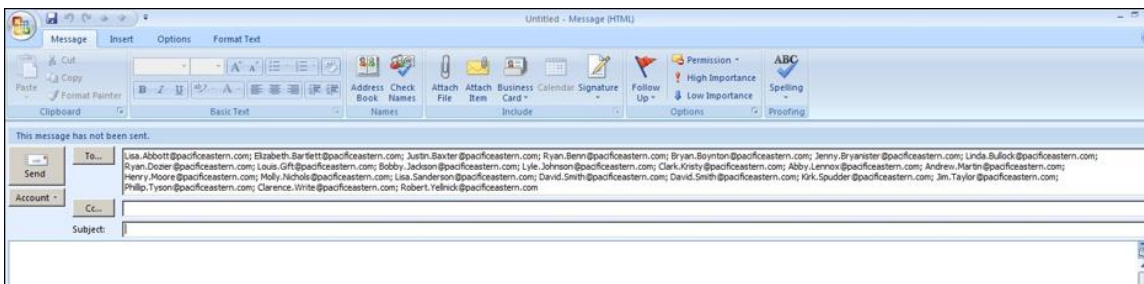


Figure 135.

## Emailing Groups from the Search View

1. Click the List View button  in the toolbar and enable the Search View.

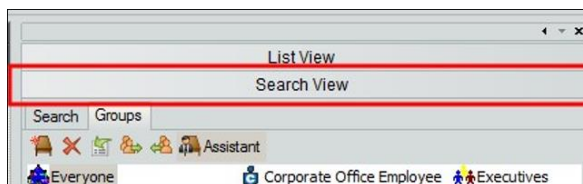



Figure 136.

2. Select the **Groups** tab and click on a group in the upper pane to automatically display the list of members in the lower pane.
3. Click the Email button  to launch your email client with the group member email addresses in the **To** field.

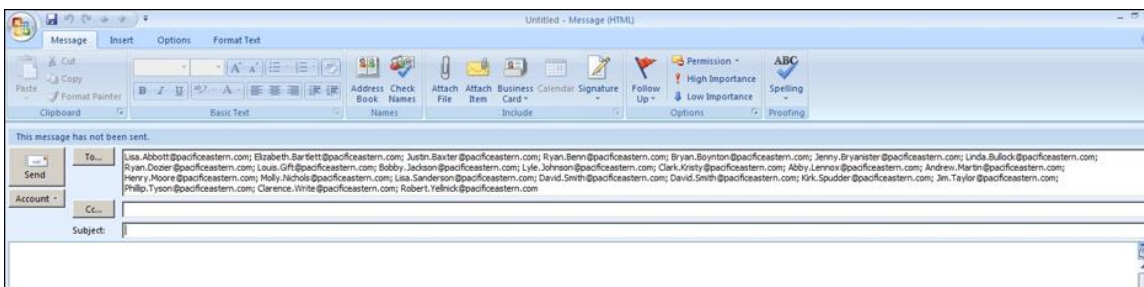


Figure 137.

**Note:** The chart administrator, during the publishing process, sets a maximum number of records allowable at one time.



## Using Conditional Formatting with Custom Position Types Based on Groups

Groups are used to provide conditional formatting to your chart. You can create conditional formatting with custom position types based on group membership, or by setting values to background areas applied in a chart box format with the Advanced Box Layout Editor. You can find detailed inform about advanced box layout in the OrgPublisher Advanced Box Layout Editor document.

1. [Create and save a group](#) with the appropriate search criteria.
2. Click **Edit** in the menu bar, then **Define** from the options list. The Define dialog opens.
3. Create a **New** position type. See the OrgPublisher Position Types document for detailed information. Click **OK**.
4. Click **Data** in the menu bar and then **Custom field properties** from the option list. The Custom Field Properties dialog opens.
5. Assign the new position type to your selected custom fields.

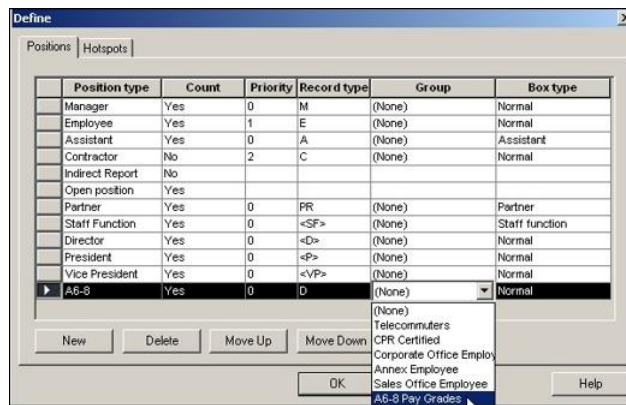


Figure 138.

6. Apply the desired formatting for the new position type in your required styles. In the example below, employees who are a pay grade of A6, A7, or A8 are assigned new formatting in the form of a red shadow.

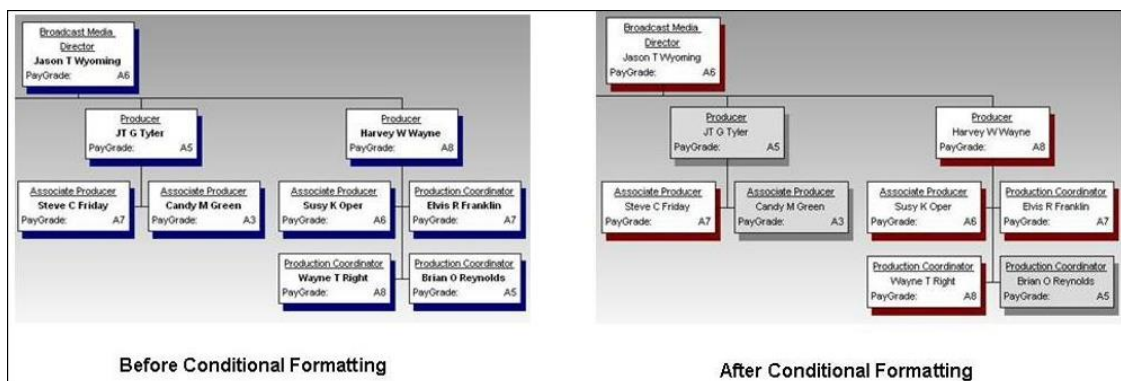


Figure 139.

## Exporting Search Results to Excel

The exporting search results to Microsoft Excel feature is:

- Available in the application as well as in charts published as PluginX and EChart rich client
- Accessible from the Search View in the chart and the Directory
- A replacement for ad hoc report queries to HR
- A one-step data move, no copy and paste required
- Available to end user with their own searches or those provided by the chart administrator

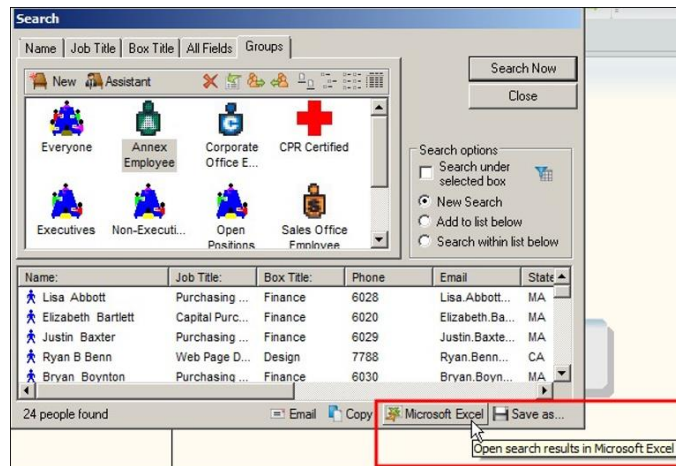




Figure 140.

## Exporting Search Results from the Search View

1. Click the List View button  in the toolbar.
2. Activate the Search View, if applicable, and select the **Groups** tab.
3. Select the group you want in the upper pane to automatically display a list of group members in the lower pane.
4. Click the Microsoft Excel button  to **Open search results in Microsoft Excel.**

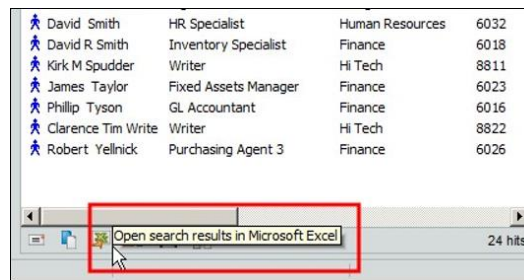


Figure 141.



The Send to EXCEL dialog opens.

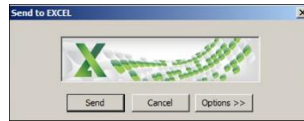


Figure 142.

5. If applicable, click **Options** to modify the Excel output.

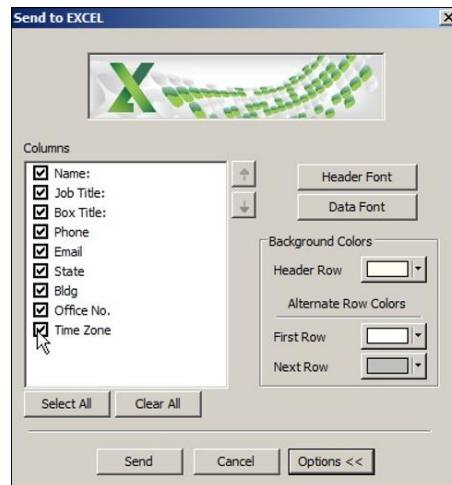


Figure 143.

6. You can do the following:

- In the **Columns** pane, click to add or remove fields for the Excel output. **Select All** and **Clear All** buttons are available if required.
- Click **Header Font** or **Data Font** to format the text in the Excel output.
- In the **Background Colors** section, choose a **Header Row** color.
- In the **Alternate Row Colors** sections, choose a **First Row** color then the **Next Row** colors. These two row colors then alternate within the Excel spreadsheet.

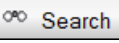
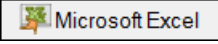
7. When your selections are complete, click **Send**. The search or group results output opens in Excel.

	A	B	C	D	E	F	G	H	I
1	Name:	Job Title:	Box Title:	Phone	Email	State	Bldg	Office No.	Time Zone
2	Lisa Abbott	Purchasing Agent 1	Finance	6028	Lisa.Abbott@pacificeastern.com	MA	Annex 2	A30	EST
3	Elizabeth Bartlett	Capital Purchases	Finance	6020	Elizabeth.Bartlett@pacificeastern.com	MA	Annex 2	A35	EST
4	Justin Baxter	Purchasing Agent 2	Finance	6029	Justin.Baxter@pacificeastern.com	MA	Annex 2	A29	EST
5	Ryan B Benn	Web Page Designer	Design	7788	Ryan.Benn@pacificeastern.com	CA	Annex	A9	PST
6	Bryan Boynton	Purchasing Agent 3	Finance	6030	Bryan.Boynton@pacificeastern.com	MA	Annex 2	A28	EST
7	Jenny L Bryanister	Digital Artist	Design	7666	Jenny.Bryanister@pacificeastern.com	CA	Annex	A11	PST
8	Linda Bullock	AP Clerk 2	Finance	6012	Linda.Bullock@pacificeastern.com	MA	Annex 2	A23	EST
9	Ryan Dozier	Controller A	Finance	7013	Ryan.Dozier@pacificeastern.com	MA	Annex 2	A21	EST
10	Louis R Gift	Writer	Hi Tech	7700	Louis.Gift@pacificeastern.com		Annex 3	A4	PST
11	Bobby Jackson	Invoicing Clerk	Finance	6024	Bobby.Jackson@pacificeastern.com	MA	Annex 2	A31	EST
12	Lyle J Johnson	Web Page Designer	Design	7777	Lyle.Johnson@pacificeastern.com	CA	Annex	A10	PST
13	Clark P Kristy	Web Page Designer	Design	9855	Clark.Kristy@pacificeastern.com	CA	Annex	A8	PST
14	Abby Lennox	Finance Clerk	Finance	6022	Abby.Lennox@pacificeastern.com	MA	Annex 2	A33	EST
15	Andrew Martin	Invoicing Clerk	Finance	6013	Andrew.Martin@pacificeastern.com	MA	Annex 2	A24	EST
16	Henry P Moore	Sr Writer	Hi Tech	4748	Henry.Moore@pacificeastern.com	CA	Annex	A2	PST
17	Molly Nichols	Operating Purchases	Finance	6021	Molly.Nichols@pacificeastern.com	MA	Annex 2	A34	EST
18	Lisa T Sanderson	Digital Artist	Design	7890	Lisa.Sanderson@pacificeastern.com	CA	Annex	A12	PST
19	David Smith	HR Specialist	Human Resources	6032	David.Smith@pacificeastern.com	MA	Annex 2	A32	EST
20	David R Smith	Inventory Specialist	Finance	6018	David.Smith@pacificeastern.com	MA	Annex 2	A26	EST
21	Kirk M Spudser	Writer	Hi Tech	9811	Kirk.Spudser@pacificeastern.com		Annex 3	A5	PST
22	James Taylor	Fixed Assets Manager	Finance	6023	Jim.Taylor@pacificeastern.com	MA	Annex 2	A22	EST
23	Phillip Tyson	GL Accountant	Finance	6016	Phillip.Tyson@pacificeastern.com	MA	Annex 2	A25	EST
24	Clarence Tim Write	Writer	Hi Tech	8822	Clarence.Write@pacificeastern.com	CA	Annex	A6	PST
25	Robert Yelnick	Purchasing Agent 3	Finance	6026	Robert.Yelnick@pacificeastern.com	MA	Annex 2	A27	EST

Figure 144.



## Exporting Search Results from the Search Dialog

1. Perform a search in the Search dialog by clicking the Advanced Search button  Search in the toolbar.
2. Click the Microsoft Excel button  to **Open search results in Microsoft Excel.**
3. Review the steps noted above in the [Exporting Search Results from the Search View](#) procedure.

## Sending Search View Results to the Profile View

Available in OrgPublisher Premier, you can send search results to the side-by-side Profile View. These results are pinned in the view to remain visible. View detailed information on the Profile View and “pinning” in the OrgPublisher Views document.

**Note:** OrgPublisher sends six results at a time to the Profile View.

1. Open the Search View.
2. Perform a search or select a group you want to use.
3. Click the Profile View button to **Include the search results in the Profile View**.

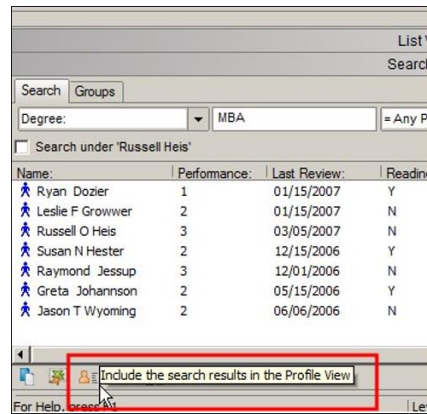


Figure 145.

In the example above, there are seven records shown in the results pane. When there are more than six results, a message indicates that only the first six records will display in the Profile View.

Click **OK** to confirm.

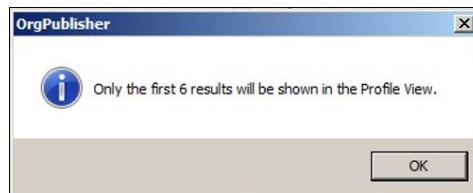


Figure 146.

The records are pinned in the Profile View.

Profile View							
6 pinned							
Name:	Greta Johansson	Raymond Jessup	Susan N Hester	Russell O Heis	Leslie F Growwer	Ryan Dozier	
Job Title:	Controller B	CFO	Marketing Vice President	President	Network Manager	Controller A	
Job Code:	157	155	35	33	32	156	
Budgeted:	Y	Y	Y	Y	Y	Y	
Approved:	Y	Y	Y	Y	Y	Y	
Effective Date:							
<b>Salary Information</b>							
Salary:	\$51,000	\$76,000	\$95,000	\$150,000	\$50,000	\$51,000	
Pay Grade:	A5	A9	A12	A14	A5	A5	
<b>Education and Skills</b>							
Degree:	MBA	MBA	MBA	MBA	MBA	MBA	
University:	Yale University	Stanford University	Wake Forest University	Harvard University	Stanford University	Harvard University	
Languages:			French, Portuguese				
<b>Planning Information</b>							
Retirement Date:	10/19/2048	08/29/2026	01/30/2029	05/30/2019	07/19/2036	07/19/2030	
Performance:	2	3	2	3	2	1	
Last Review:	05/15/2006	12/01/2006	12/15/2006	03/05/2007	01/15/2007	01/15/2007	
Readiness:	Y	N	Y	N	N	Y	

Figure 147.

## Setting a Default Base Filter for Searching

You can hide selected records, such as executives or open positions, so that a search does not display those records in a results list. The chart administrator can set a base group, or filter, containing the records that can be searched.

1. Create a search that eliminates the records that should not be searched.

1. Search on **Position type** of **Open position**.
2. Set **Match** as **Not equal to**.

This returns records of all other position types of 197 records.

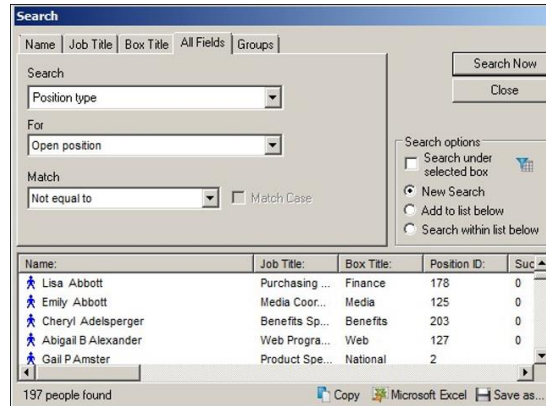


Figure 148.

3. Save this group as the **Filled Positions** group.

2. Select the Filter button  in the **Search options** section to **Set or remove a base filter for searching**.

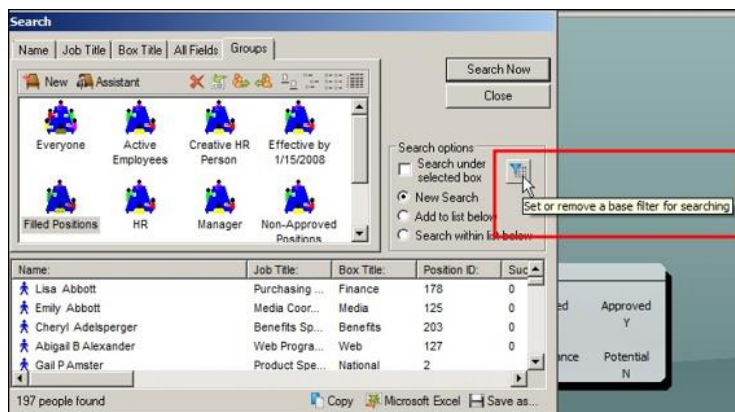


Figure 149.

The Search Base Group Filter dialog opens.

3. Select the **Use a base group filter** check box.

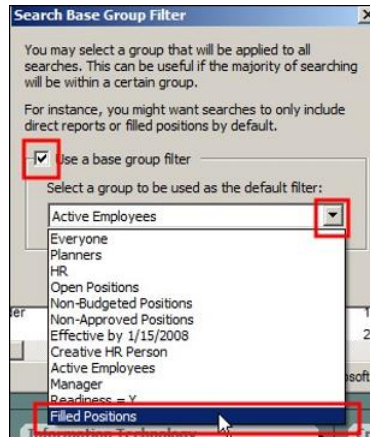


Figure 150.

4. Click the drop-down arrow to select the base group, **Filled Positions**, and click **OK**.



Figure 151.

Test the filter by searching for records excluded from the base filter. The following example is a search for open positions, which are excluded from the base filter. The results pane shows that a match for Open position = **Equal** results in 0 records found.

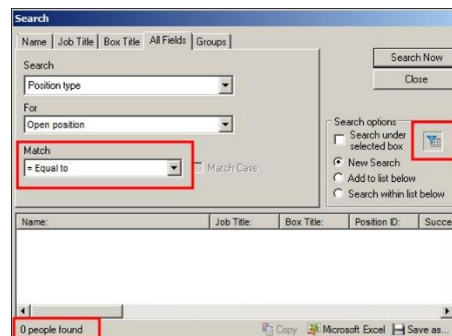


Figure 152.

## Removing a Base Filter

When the base filter is applied, in this case, **Filled Positions**, the filter button appears “pressed in” and the excluded records are not found.

### Search View



Figure 153.

### Advanced Search Dialog

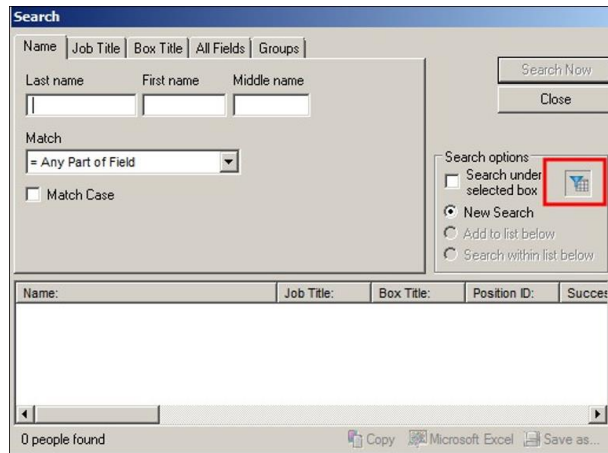


Figure 154.

When the base group filter, **Filled Positions**, is removed by clicking the filter button, 13 **Open position** records are found.

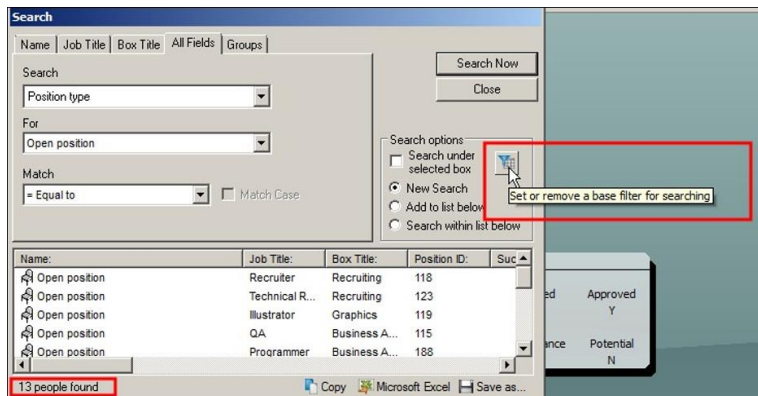


Figure 155.