

OrgChartHosting

TUTORIAL 5 – CREATING A MASTER PAGE

OrgChart Now Tutorials

VERSION 1 – PREPARED BY ORGCHART HOSTING – 02.24

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TUTORIAL 5

OVERVIEW

In this tutorial we will be building a custom Background.

This training is for both Administrators and End Users.

This tutorial will cover -

- Creating a Background
- Adding a logo
- Adding auto text & text boxes
- Adding a legend
- Adjusting the header
- Saving a Background

These tutorials are part of a series of tutorials designed to provide you with a better understanding of the OrgChart Now solution.

The OrgChart Viewer displays the current master chart.

The master chart is a read only chart that is automatically sychronized with your source HR data.

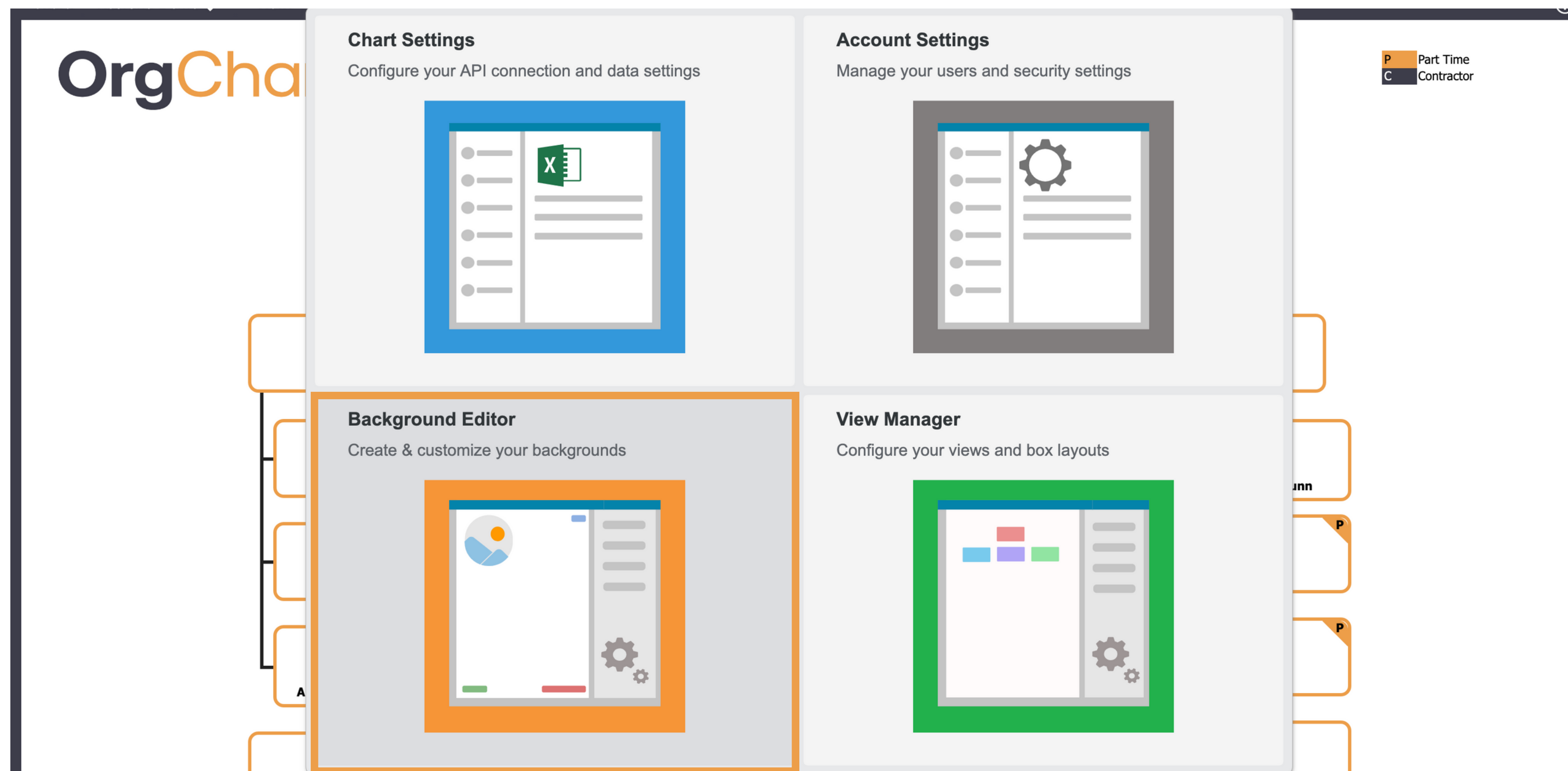
The Chart Builder allows you to take a snapshot of any subset of your master chart.


This snapshot is the starting point for a workforce plan.

The Workbench allows Administrators and Read/Write users to create and modify customized chart exports using their Master Chart data.

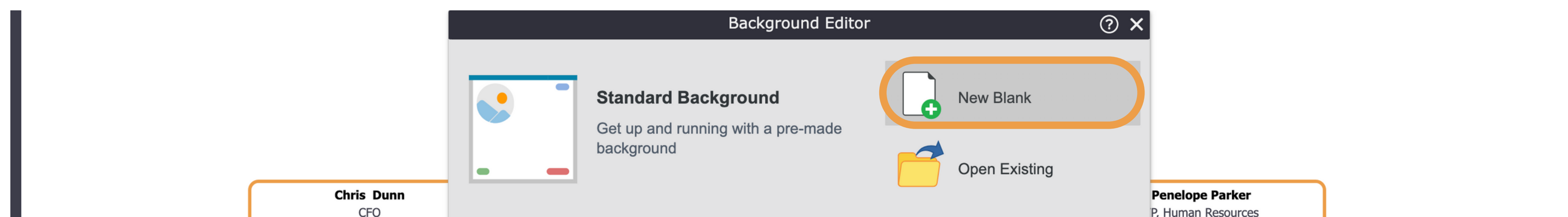
ORGCHART BACKGROUNDS – CREATING A BACKGROUND

Backgrounds contain elements, such as company logos, legends and page numbers, and can be applied to Master Charts or Chart Documents. Users can create, modify, and manage their backgrounds in the Background Editor.



1 Click on the  menu icon and select Setup.

2 Select Background Editor.

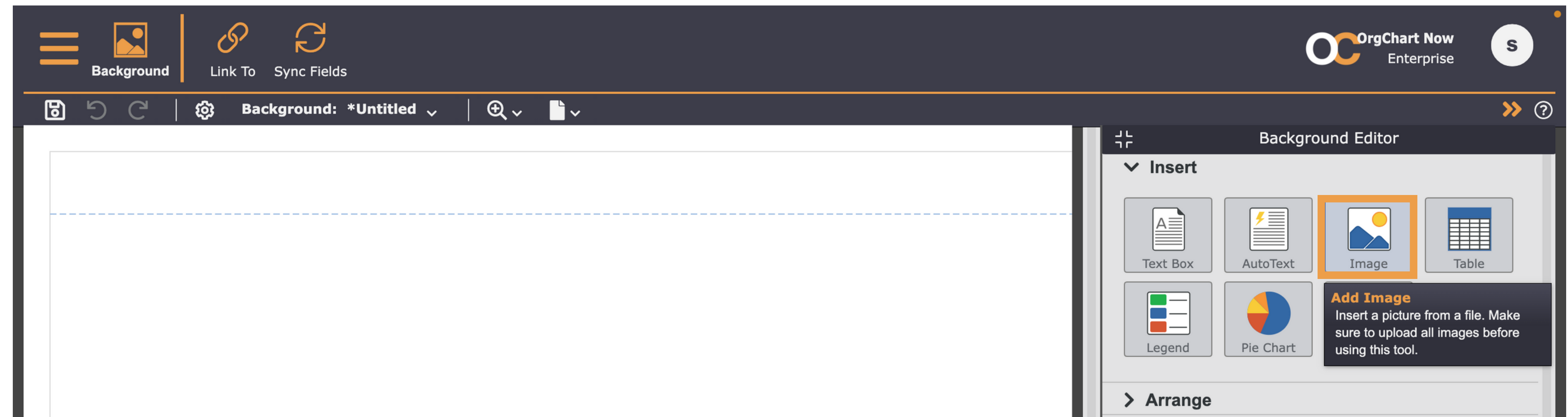


3 Click the New Blank option in the Background Editor pop-up panel.

ORGCHART BACKGROUNDS – ADDING A LOGO

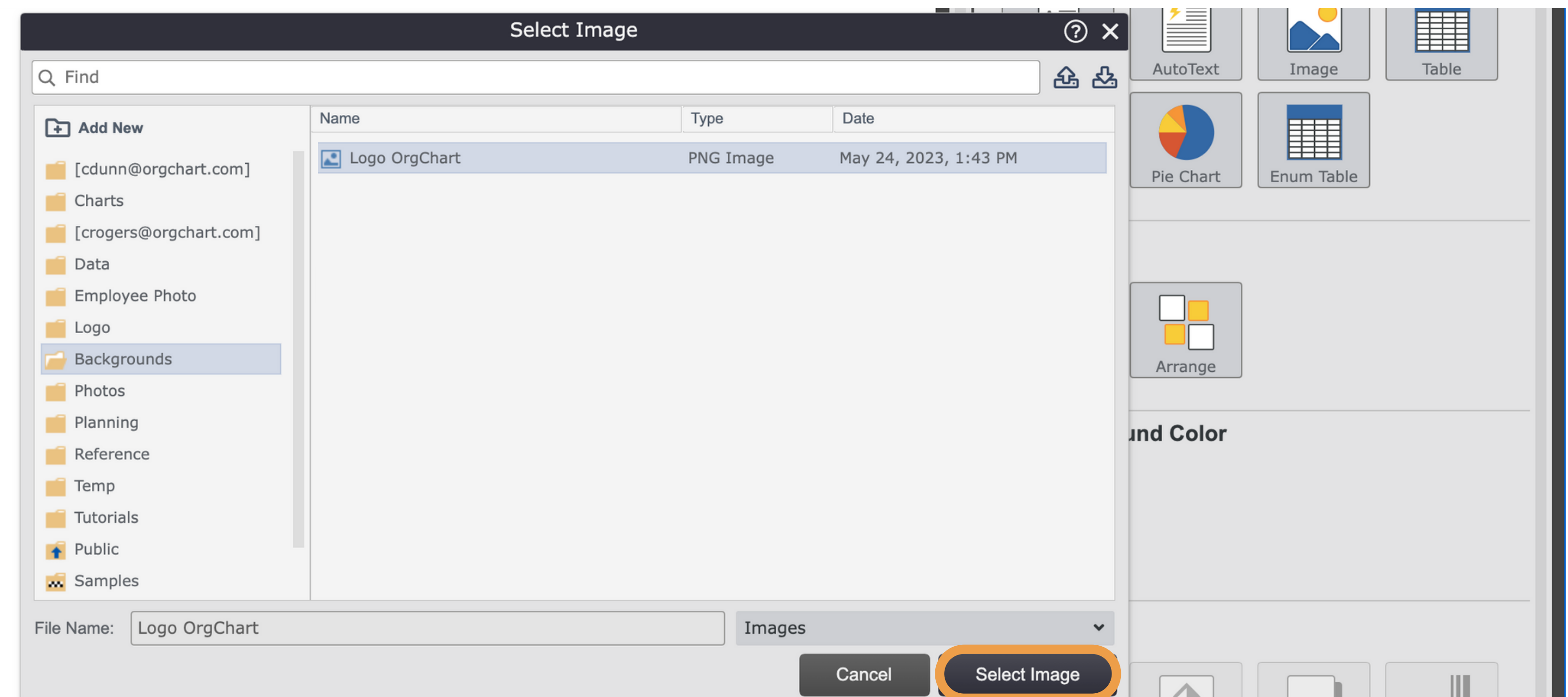
Most users want to add a corporate logo to their master page.
Logos should be in PNG format and preferably have a transparent background.

1 In the Background Editor, click the Image icon to insert an image.



2 Upload the logo/image you wish to use on your Background using the upload button on the top right of the File Manager.

Make sure the image is selected and click the Select Image button.



ORGCHART BACKGROUNDS – ADDING A LOGO

Most users want to add a corporate logo to their master page.
Logos should be in PNG format and preferably have a transparent background.

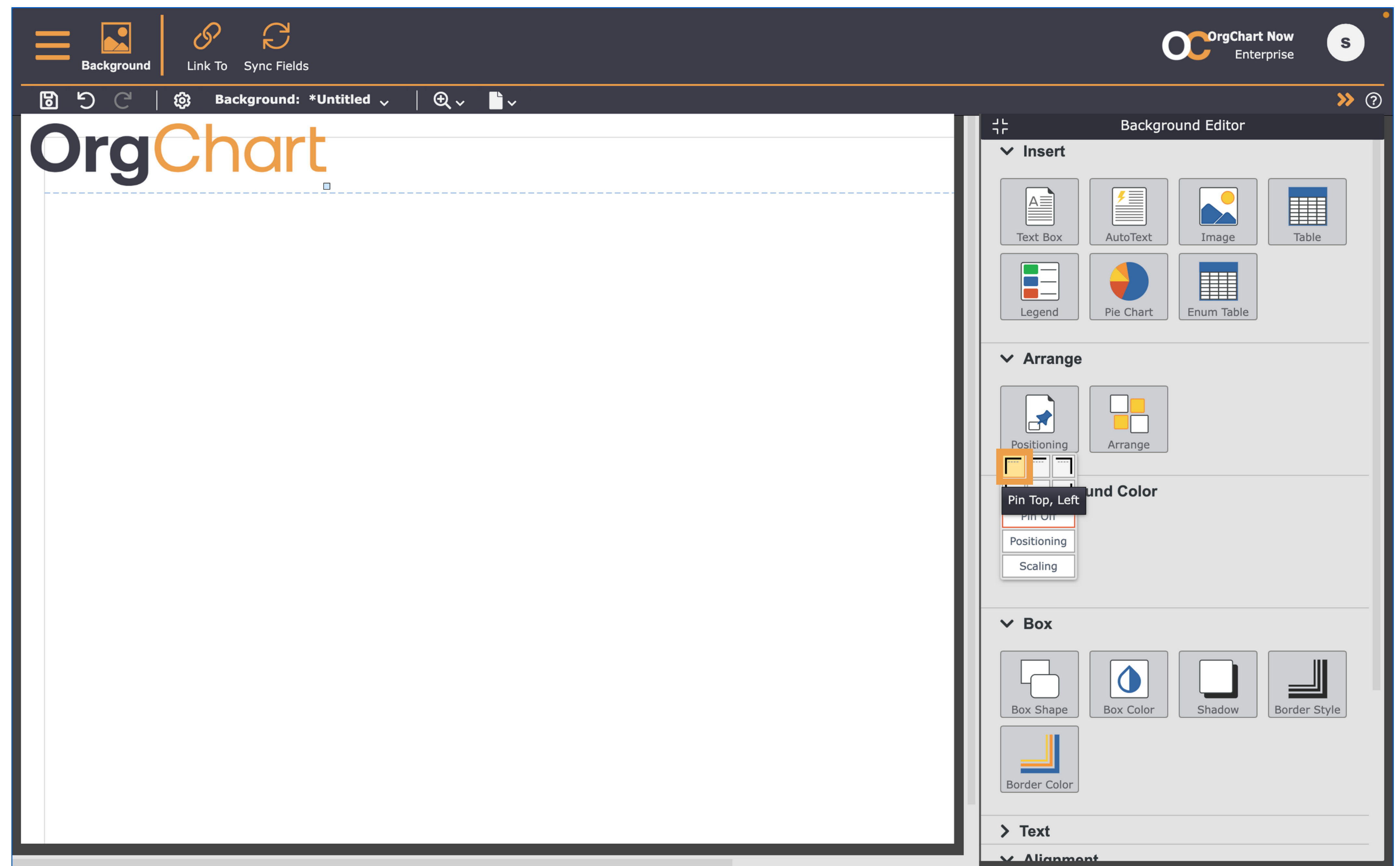
3

Ensure the logo you just inserted onto the page is selected, navigate to the Arrange section on the Background Editor and click the Positioning button.

Pin the logo to the upper left of the page by selecting the Pin Top Left option.

Important Note:
Pinning objects on the Background ensures that the objects do not move around the page when exporting or changing page sizes.

Pinning all objects inserted is best practice when creating a Background.



ORGCHART BACKGROUNDS – ADDING AUTO TEXT AND TEXT BOXES

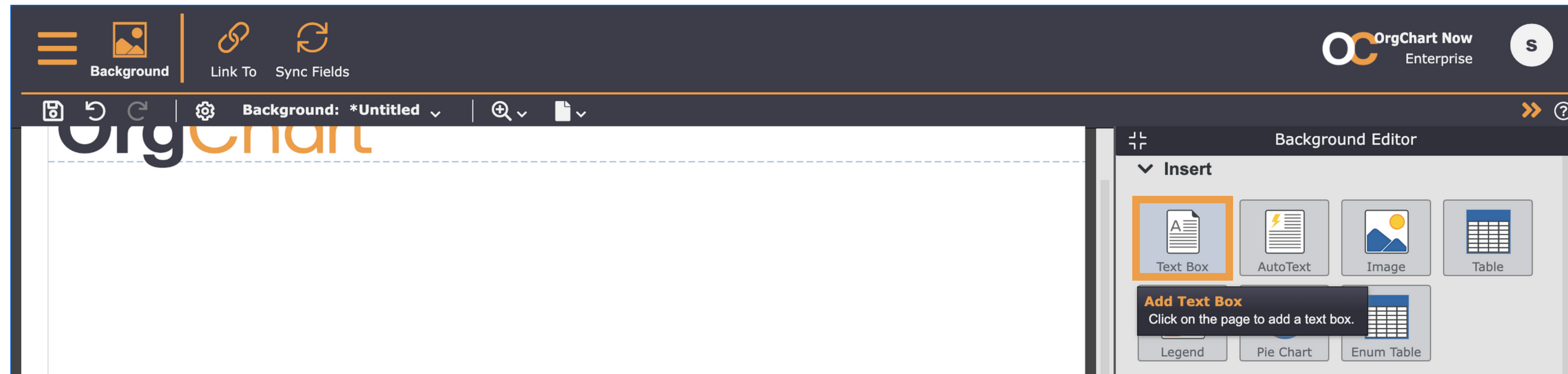
The screenshot shows the OrgChart Background Editor interface. The main canvas on the left displays the 'OrgChart' logo. The right-hand panel is titled 'Background Editor' and contains several sections: 'Insert', 'Arrange', 'Background', and 'Box'. The 'AutoText' button in the 'Insert' section is active, and its dropdown menu is open, listing various text options. The 'Refresh Date' option is highlighted with an orange oval. Below the 'Background Editor' panel, a second screenshot shows the 'Arrange' section of the editor. The 'Pin Bottom, Left' option is highlighted with an orange box, and a tooltip is visible over it.

1 Click on the Auto Text button and select the Refresh Date option.

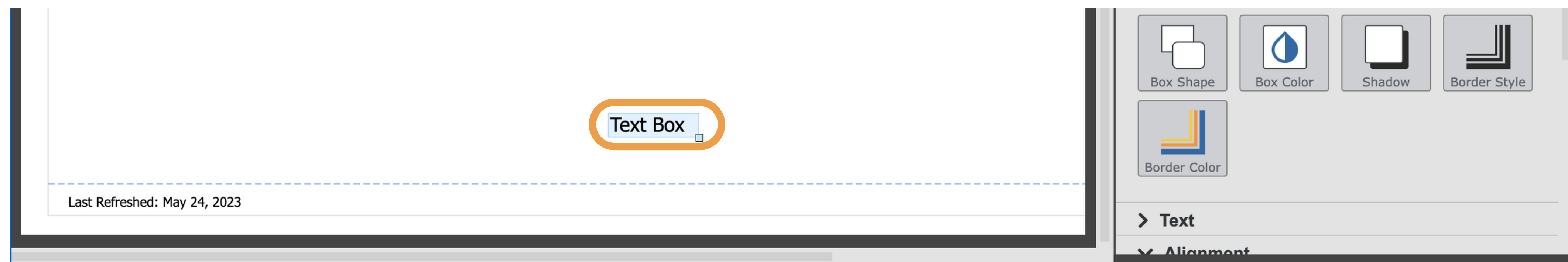
Click anywhere on the page to place the Auto Text.

2 Pin the logo to the bottom left of the page by selecting the Pin Bottom Left option.

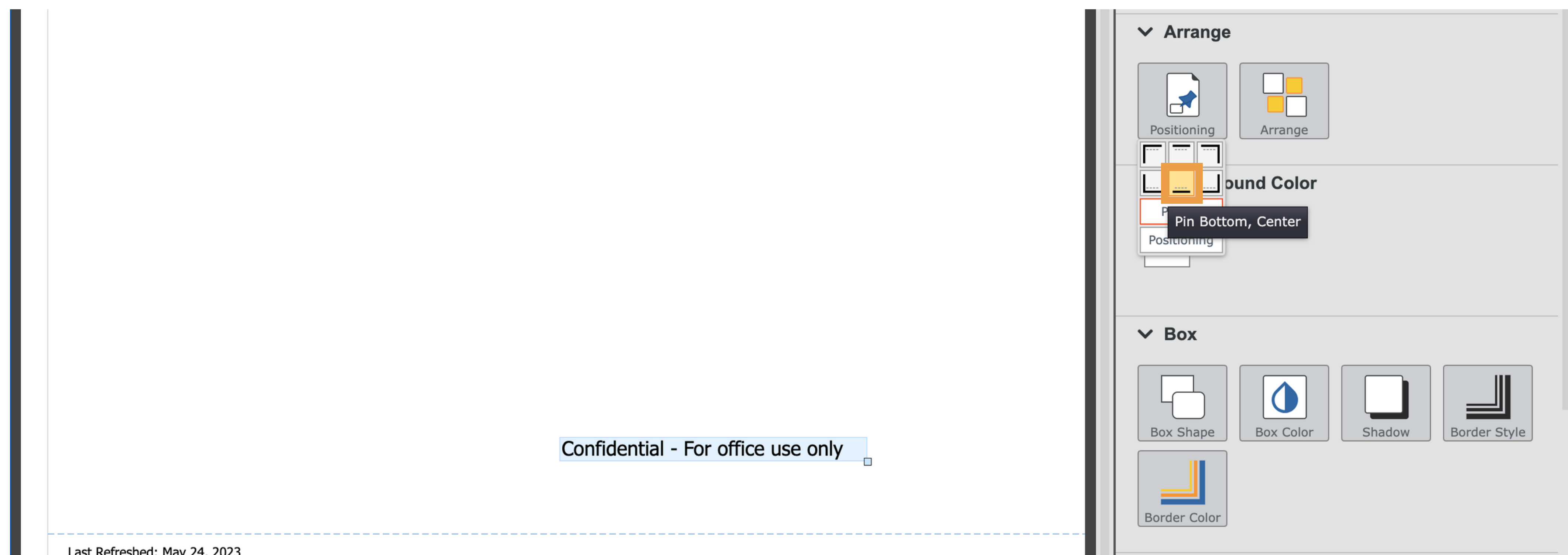
ORGCART BACKGROUNDS – ADDING AUTO TEXT AND TEXT BOXES



1 Click on the Text Box button click anywhere on the page to place the Text Box.



2 Double-click on the text box to begin typing your own text.

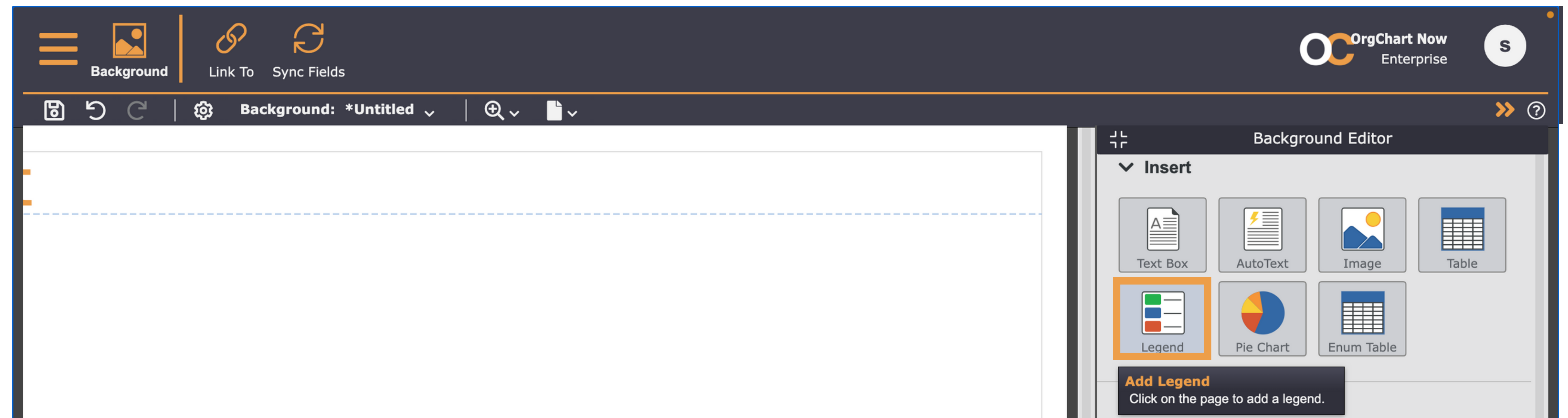


3 Pin the Text Box to the bottom center of the page by selecting the Pin Bottom Center option.

ORGCHART BACKGROUNDS – ADDING A LEGEND

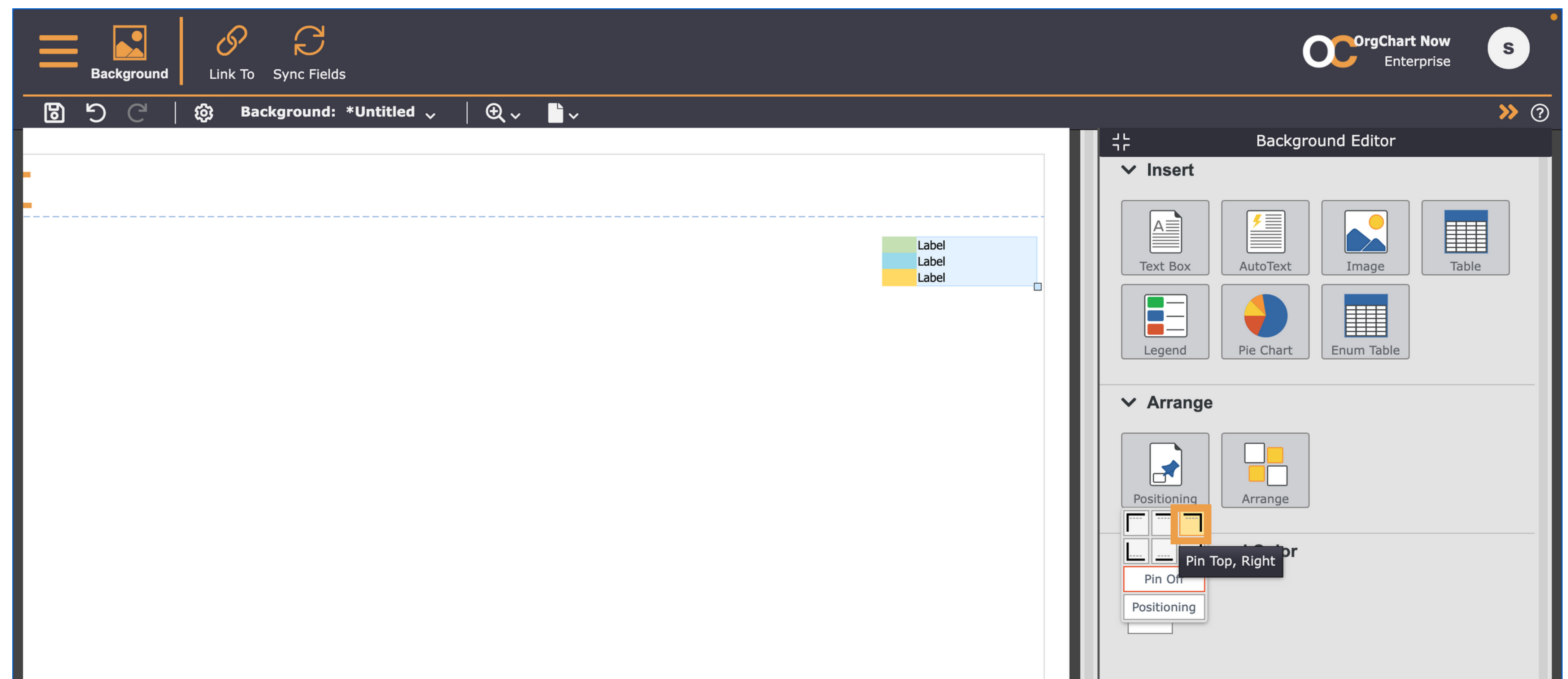
1

Click on the Legend button click anywhere on the page to place the Legend.



2

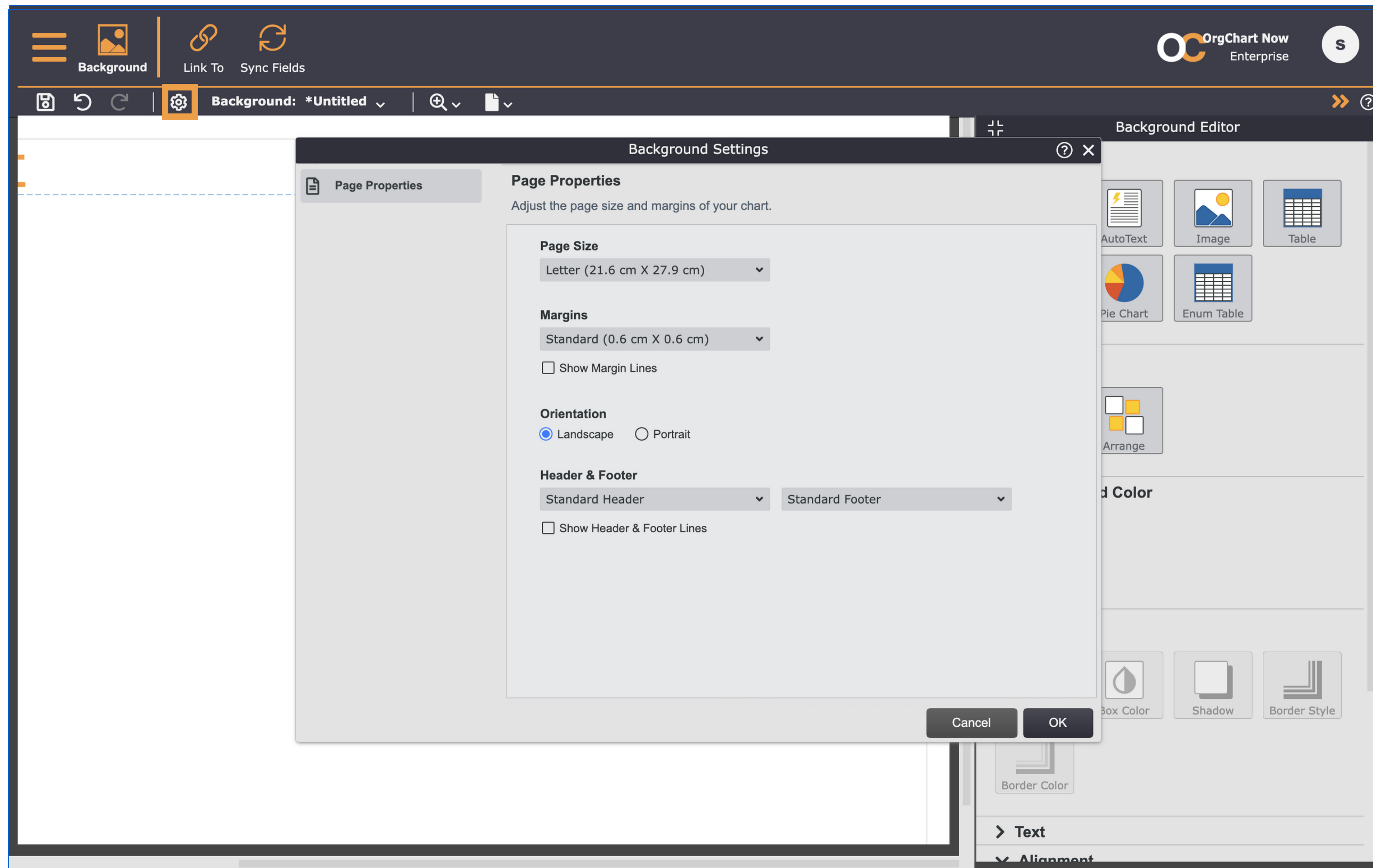
Pin the Legend to the top right of the page by selecting the Pin Top Right option.



To see the formatting of the legend, continue to Tutorial 7.

ORGCHART BACKGROUNDS – ADJUSTING THE HEADER

You may need to adjust the header to make sure that the logo doesn't interfere with your org chart.



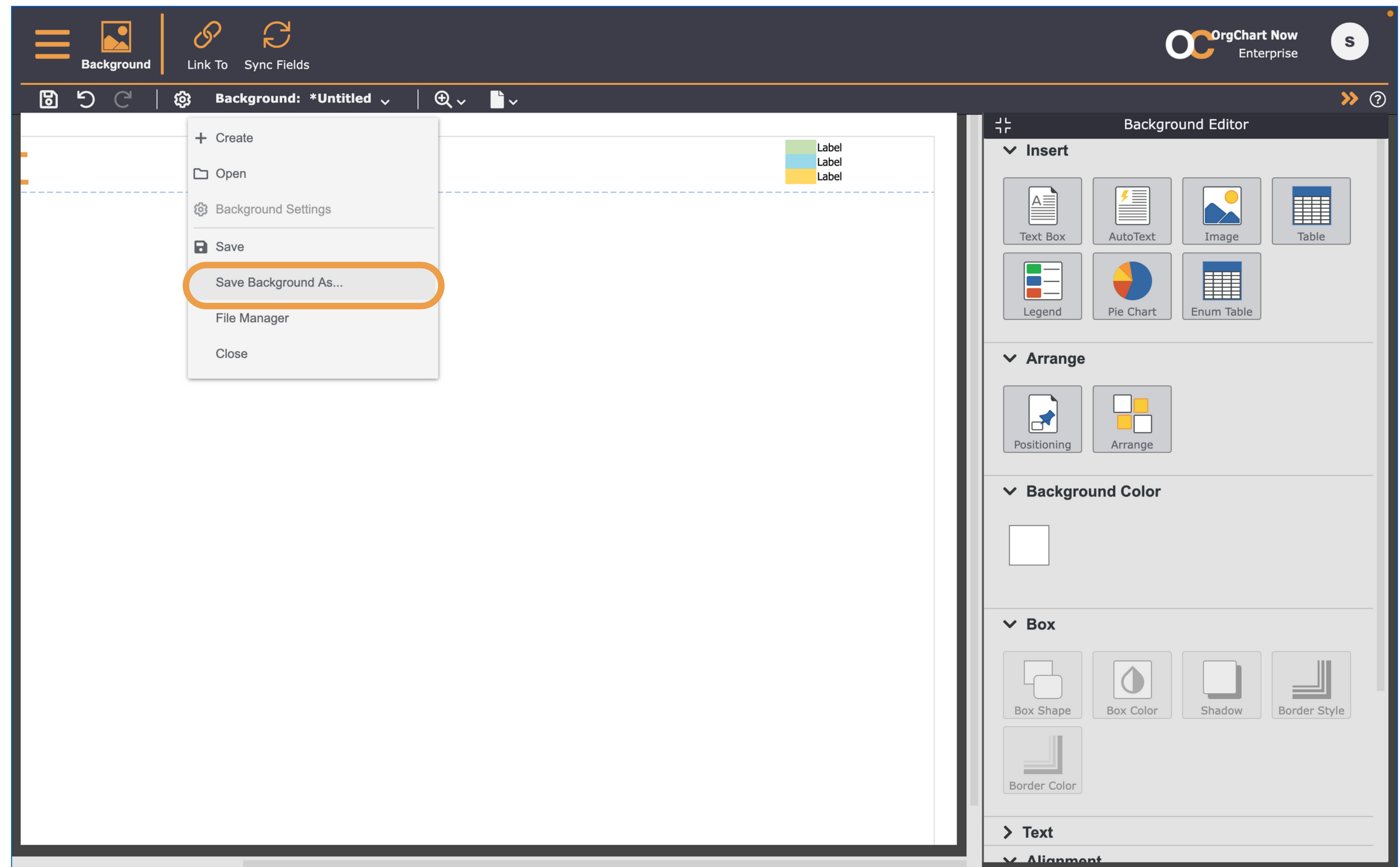
1 Click on Gear icon to navigate to the Background Settings panel.

The Background Settings panel is where you can configure all of your document properties for this specific Background.

ORGCHART BACKGROUNDS – SAVING A BACKGROUND

Always double-check that you are saving your Background in the Backgrounds folder.

1 Click on the Background drop-down and select Save Background As...



CONCLUSION

END OF TUTORIAL 5

In this interactive tutorial, we covered some of the key steps to create a custom Background for your charts.

In the next tutorial we will learn about creating custom Box Styles.



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