

# ORGPLUS ADVANCED WORKSHOP

## AUDIENCE

It is assumed that attendees of this course have been using OrgPlus at a basic to intermediate level and are able to import data, create a chart and undertake basic formatting of a chart. We highly recommend attending OrgPlus Desktop Fundamentals before attending the advanced course.

## COURSE CONTENT

The workshop will begin with a brief recap of:

- Box Properties
- Chart Rules

Following the recap, workshop participants will learn how to:

- Use the Advanced tab in Box Properties
- Create advanced org chart rules, including:
  - Org chart styles
  - Org chart actions
- Create email and HTML links
- Create mapped fields (converting text to images)
- Duplicate org charts
- Create advanced formulas, including:
  - Range overview
  - Headcounts
  - Total FTE
  - Age statistics
  - Actual Salary (Salary \* FTE)
  - Sectioning of strings
  - Available Formula Overview
- Create advanced conditional formats, including:
  - Vacant Positions
  - Adding Legends
- Create hidden fields
- Use the panel feature, including:
  - Advanced profiles, tabs and conditional formats



- Comments
  - Reports
  - Summaries
- Create information hotspots
- Create groups
- Apply custom templates
- Perform organizational re-structuring, including:
  - Adding, moving and deleting boxes
  - Modifying fields
  - Compare charts
  - Tracking changes
  - Setting up chart security