

OrgChart Now WordPress Org Chart Links

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OrgChart Now – WordPress Org Chart Links

Introduction

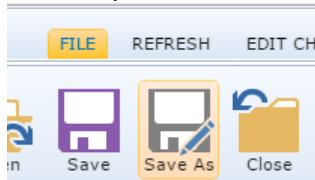
OrgChart Now charts can be embedded directly into your WordPress Site. This document details how to embed your org chart into your WordPress Site.

Note: Please email orgchartnow@officeworksoftware.com if you need assistance.

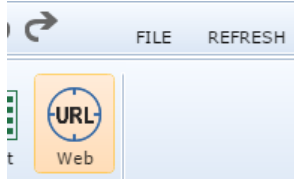
OrgChart Now Setup

Use the following procedure to generate a link that can be embedded in your WordPress site.

1. Log into OrgChart Now (account must have administrator privileges)
2. If you haven't done so already, create a 'read only' user id (See Appendix A for details)
3. Open your org chart (see the Getting Started Guide for more information on how to create a chart)
4. Save your chart in the 'Public' folder (Use the Save As option under the FILE tab)



5. Click on the 'SHARE' tab
6. Select the 'Publish to Web' option.



7. The 'OrgChart Now – URL Generator' web form is displayed. You can either generate a 'Public Link' or a 'Restricted Link'. A 'Restricted Link' is more secure than a 'Public Link' but requires the OrgChart Now team to add a 'restriction' to our database. See Appendix B for additional details on Restricted Links.

OrgChart Now - URL Generator

Link Type:	<input type="text" value="Public Link"/>
User ID:	<input type="text"/>
Org Chart File Name:	<input type="text"/>
Directory:	<input type="text" value="Public"/>
Launch Mode:	<input type="text" value="Portal"/>
Functionality:	<input type="text" value="All"/>
Initial tab:	<input type="text" value="None"/>
Background Color (HEX):	<input type="text" value="FFFFFF"/>
Zoom:	<input type="text" value="100%"/>
Hide Tabs:	<input type="text" value="None"/>

This utility allows you to generate a link (to an org chart) that can be pasted into an email or embedded into a web page. Public links are used to share org charts on the internet. Chart must be saved in the public folder.

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8. Fill in the following required fields:
 - a. Read Only User ID (See Step 2 above)
 - b. File Name (name of the chart you saved to the Public folder)
9. Fill in other fields as desired. The default settings are typically ok; however, you can try different parameters if needed.
 - a. Functionality – Allows you to control what functions the end user can access (e.g. Publish to PDF or Export to Excel).
 - b. Initial Tab – Allows you to configure which tab is initially shown (e.g. Search or Profile)
 - c. Zoom – Typically set to 100%. Set to 75% or 50% if you have a large chart.
 - d. Hide Tabs – Allows you to hide tabs from the end user. For example, you may not want the end user to access the additional details shown in the Profile panel.
10. Click 'Test URL' to make sure the URL is working as expected.
11. Once you have the URL configured correctly, click on 'Generate URL'. The resulting URL will be used in the next step.

WordPress Site Setup Option #1 – Embed an Org Chart

Use the following procedure to embed an org chart in your WordPress Site.

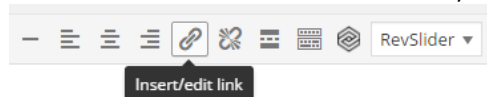
1. Log into your WordPress site as an administrator
2. Make sure the 'iFrame' plugin is installed (<https://wordpress.org/plugins/iframe/>)
3. Add a new page or edit an existing page.
4. Paste the URL you generated in the previous procedure into the page.
5. Add the following text around the URL.
[iframe src="<YOURLINK>" width="100%" height=800]
6. Save your web page (Save Draft).
7. Test the page to make sure it works as expected (Preview or Publish).

Note: If you update and save your chart in OrgChart Now, the chart will automatically be updated in WordPress Site the next time you access the org chart page in your site. If you are already displaying the org chart page, you will need to refresh the page (F5) in the browser to view the updated chart.

WordPress Site Setup Option #2 – Open Org Chart in a new browser tab

Use the following procedure to link from your WordPress Site to your Org Chart.

1. Log into your WordPress site as an administrator
2. Add a new page or edit an existing page.
3. Paste the URL you generated in the previous procedure into the page.
4. Select the URL and click on the Insert/edit link button.



5. Set the 'Link Text' field as appropriate. Also make sure to select the 'Open link in a new window/tab' option. Click Add Link when finished.

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Insert/edit link

Enter the destination URL

URL

Link Text

Open link in a new window/tab

Or link to existing content ▾

Cancel

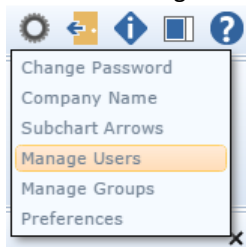
6. Save your web page (Save Draft).
7. Test the page to make sure it works as expected (Preview or Publish).

Note: If you update and save your chart in OrgChart Now, the chart will automatically be updated in WordPress Site the next time you access the org chart page in your site. If you are already displaying the org chart page, you will need to refresh the page (F5) in the browser to view the updated chart.

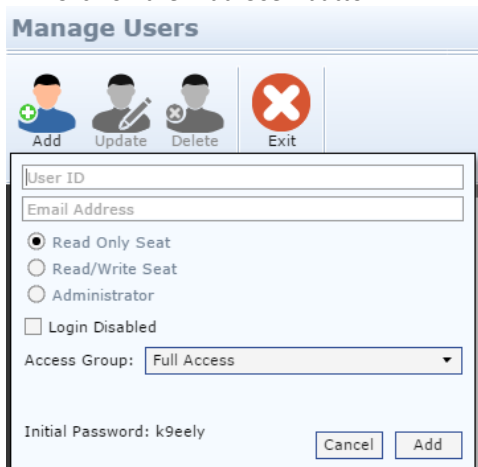
Appendix A: Adding a Read Only User Account

Use the following procedure to add a read only user account.

1. Select the 'gear' icon and then select 'Manage Users'



2. Click on the 'Add User' button



Manage Users

Add Update Delete Exit

User ID

Email Address

Read Only Seat
 Read/Write Seat
 Administrator

Login Disabled

Access Group:

Initial Password: k9eely

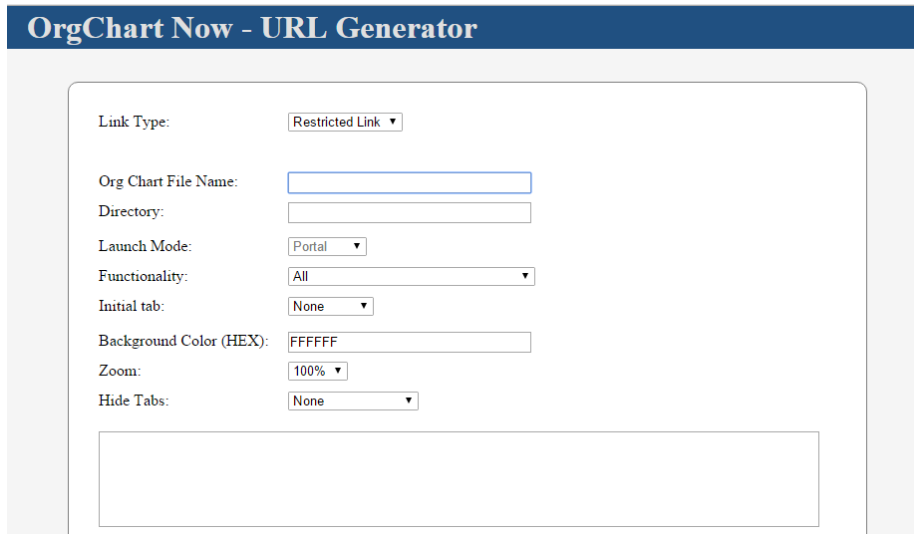
3. Enter a 'User ID'
4. Enter any email address (does not need to be valid). DO NOT USE your email address as it may already be used by your OrgChart Now account.
5. Click Add and then Click Exit.

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Appendix B: Restricted Links

To setup a restricted link, follow the procedure above ‘OrgChart Now Setup’ procedure (above) with the following exceptions.

1. Select the ‘Restricted Link’ option in the ‘OrgChart Now – URL Generator’ form.
2. Save your chart to any folder other than the ‘Public’ folder (e.g. create a folder called ‘Restricted’). Specify the chart ‘Directory’ in the ‘Directory’ field.
3. Email orgchartnow@officeworksoftware.com to request that a ‘restricted link’ for your account. Make sure to include the URL (generated in the form) in the email.



The screenshot shows the 'OrgChart Now - URL Generator' form. The 'Link Type' dropdown is set to 'Restricted Link'. Other fields include: 'Org Chart File Name' (empty), 'Directory' (empty), 'Launch Mode' (Portal), 'Functionality' (All), 'Initial tab' (None), 'Background Color (HEX)' (FFFFFF), 'Zoom' (100%), and 'Hide Tabs' (None). A large empty text area is at the bottom of the form.