



Insperity® OrgPlus® RealTime
Administrator Guide
Creating Views

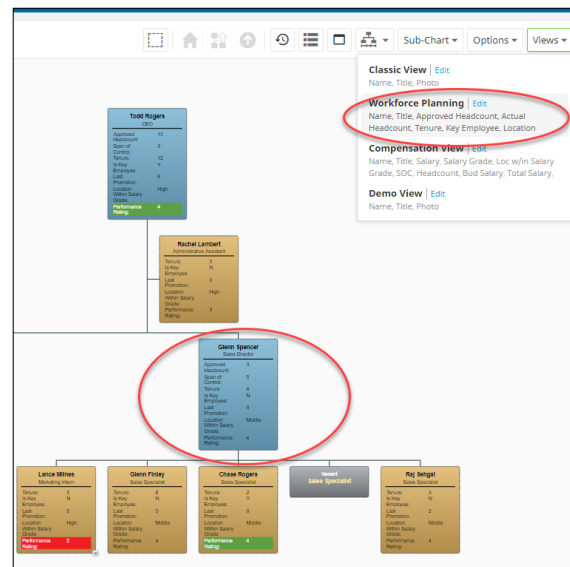
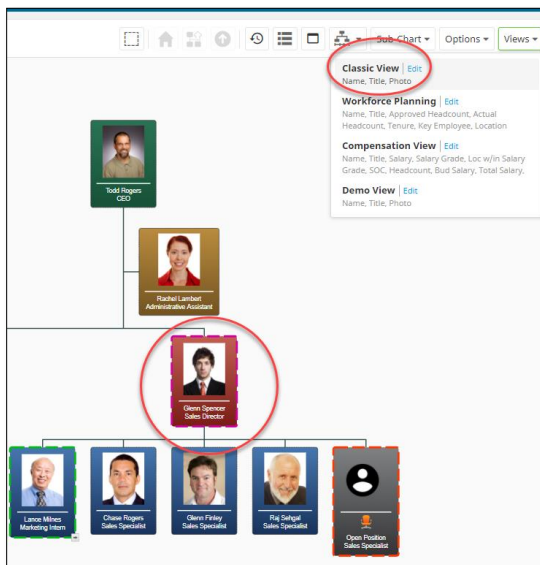
Creating Views in Insperity® OrgPlus® RealTime

This guide will provide instruction on creating or editing a view in OrgPlus RealTime. The topics covered will include:

What are views?.....	3
Creating/editing a view.....	3
Create a new view	4
Edit an existing view.....	4
Overview of a Views Module	4
Setting up your Box Types.....	5
Adding Border Highlights.....	9
Settings.....	10
Adding different Styles	11
Box Styles	11
Border Highlights.....	11
Field Highlights	12
Box Properties.....	12

What are views?

Insperity® OrgPlus® RealTime allows administrators to create different views of their chart. Views display different information on the boxes, different colors of the boxes, and highlights to call out different data points. In addition, different profile cards can be assigned to views, proving data points relevant to the view's purpose.

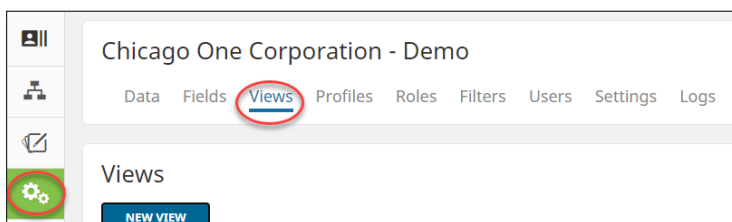


Views control:

- Profile headers/bodies
- Colors of the boxes
- Fields included in each box
- Highlights around the box
- Highlights on fields within the box
- Sort order of the boxes

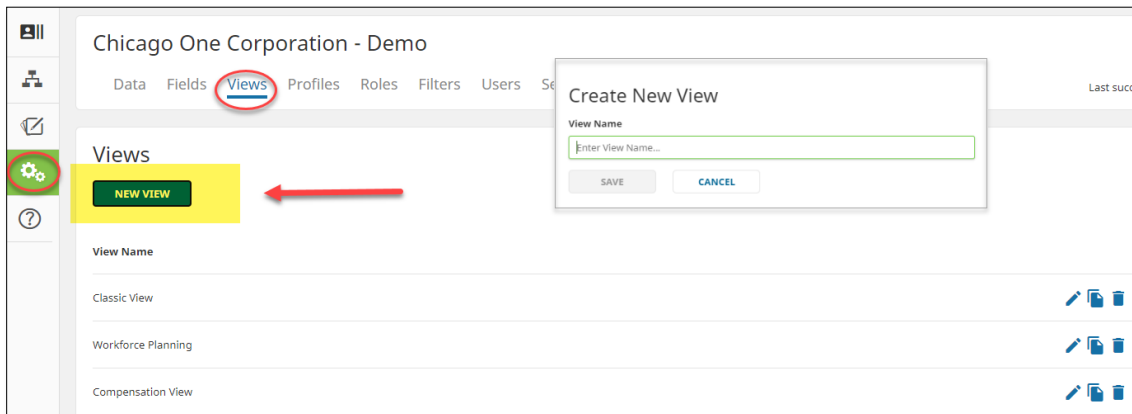
Creating/editing a view

To create a new view or edit an existing view, navigate to **Administration > Views**.



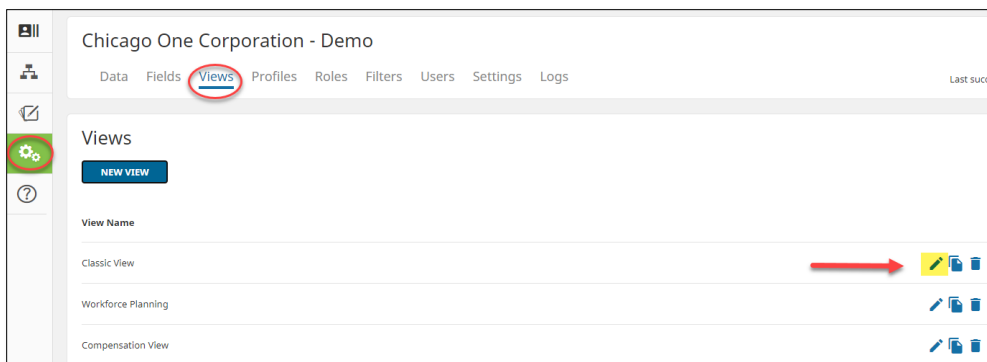
Create a new view

To create a new view, select **New View**. Enter the name of the new view. Once your view has been created, a default view will populate and you can begin editing the view.



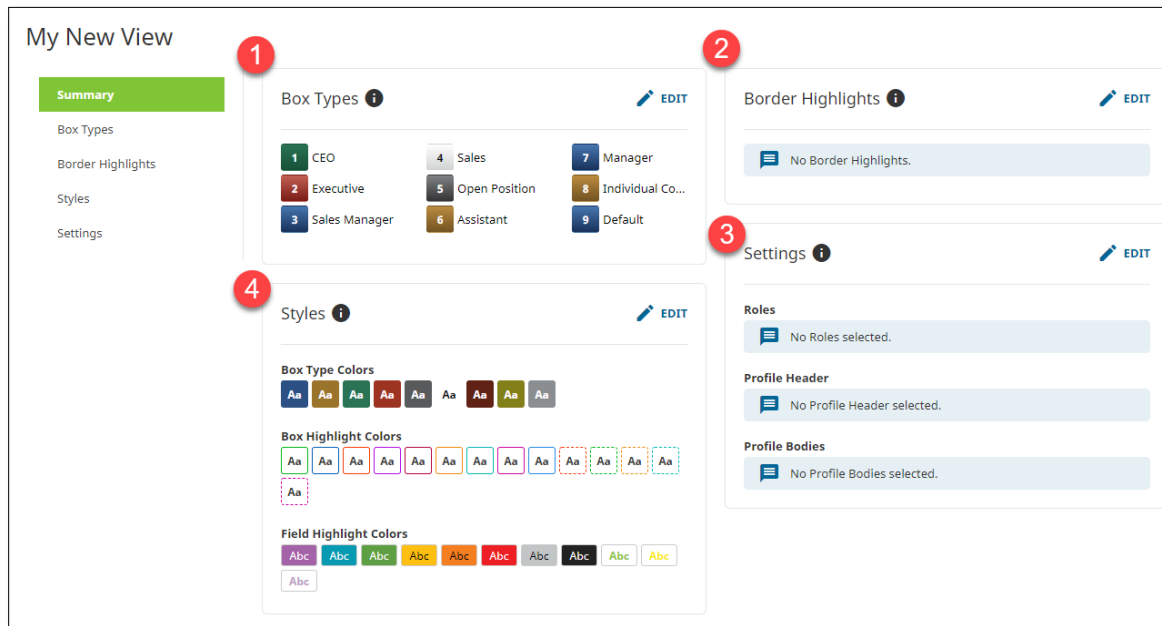
Edit an existing view

To edit a view from the views list, select the **Edit** icon to the right of the view you would like to modify.



Overview of a Views Module

Once you have entered the views design module, you will see 4 quadrants that have different areas of functionality:



- (1) **Box Types:** Box types are configured to determine who gets what box style and what that box style has on the face of the box. For example, a manager would get a box that displays additional information about their team whereas a non-manager's box would only display information about themselves.
- (2) **Border Highlights:** Applying border highlights to the view allows boxes that meet certain criteria (Part-time employees, temporary employees...) display a color and/or dotted border around the box.
- (3) **Settings:** This area allows profile cards to be assigned as well as roles that are allowed to have access to this role. Other options include adding a description to the view and allowing a sort order to be applied to the boxes.
- (4) **Styles:** Styles allow you to make custom colors to the box types, borders, and field highlights. In this section you can also adjust the width of the boxes and the layout of the employee photos within the box.

Setting up your Box Types

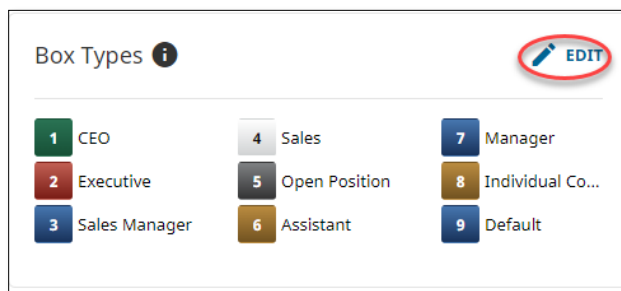
Box Types allow you to create different boxes based on conditional formatting. For example, you can color all part-time employees one color with different information displayed on the box than full-time employees.

In this example, Ned Gorman, manager, has a blue box color and includes information about the number of reports and salaries of people reporting to him. His employees, who are non-managers, are in grey boxes and do not include headcount or budget/total salaries. Ned is in a different box type than his reports.

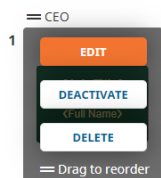



1. Enter into edit mode

To edit or create new box types go to **Box Types** then click on the **Edit** icon.



To edit existing box types, hover over the box to be edited and select **Edit**. You are able to delete boxes if you would like to exclude any box types no longer in use.



1. To add a new box type, click on “**New Box Type**” 

2. Add the **Box Type Name**.
3. Select **Box Color** for this Box Type. If additional box colors are needed, you can add them using [Styles](#).
4. Use the **Box Condition** button to define when this Box Type should be applied to the chart's employee boxes.

In this example, the administrator wants to color all the boxes for the employees who are in the executive team blue. Anyone in the company whose title contains the words president or director should be included in this team. The configuration below adds a rule to find anyone with president in the title and a rule to find anyone with director in the title. The rule uses the "Any" condition to find either president or director.

Box Type Name

Box Condition

Match Any All of the following rules:

Job Title	▼	contains	▼	President	- +
Job Title	▼	contains	▼	Director	- +

+ ADD RULE
+ ADD RULE GROUP

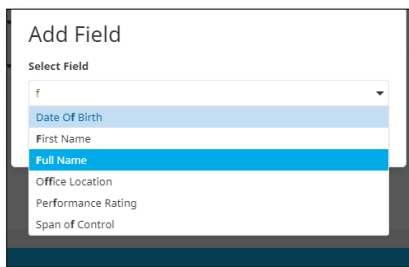
Select Box Color

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

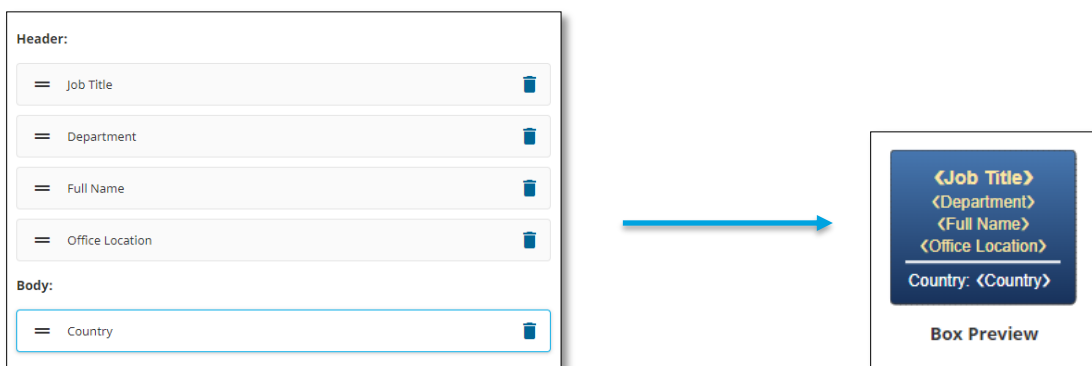
5. Under **Field Properties**, you will use the **Add Data** button to begin adding the Information you would like to display on the face of the box for each employee. The following Information can be added:

<p>ADD DATA</p> <p>Field</p> <p>Custom Text</p> <p>Symbol</p> <p>Block</p>	<p>Field - Add any data source or calculated field</p>
	<p>Custom Text - Add static text to your box such as “Salary Information” or “Demographic Information”</p>
	<p>Symbol - Add an image from our image library</p>
	<p>Block - Block specific fields from displaying based on certain criteria</p>

Field: When selecting "Add Field", a new window will be displayed where you can select from a list of data file fields or calculated fields. Select the field you would like to add to the chart box then click the **Add** button.



Drag and drop fields in the correct order and placement. Header will display towards the top of the box and adding fields to the body will create a solid line on the box and display the field under the line:



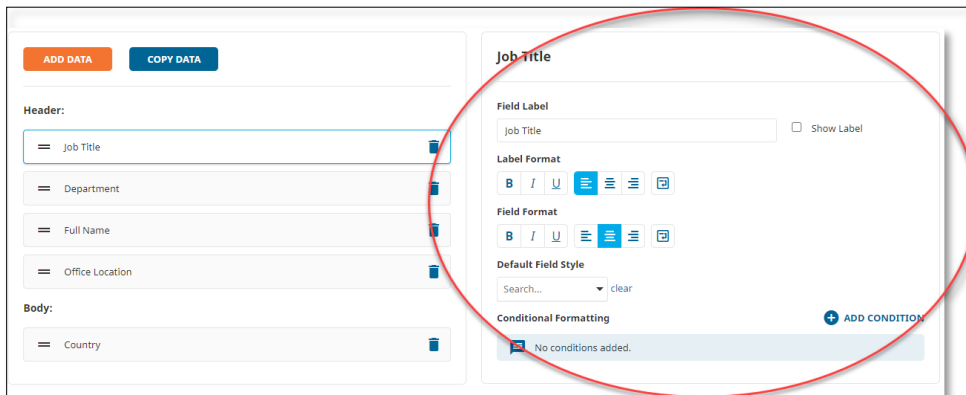
Formatting Field Labels and Cells

You can change the following format properties for each field in a box:

- Field label

- Field style
- Text alignment and word wrapping
- Number formatting

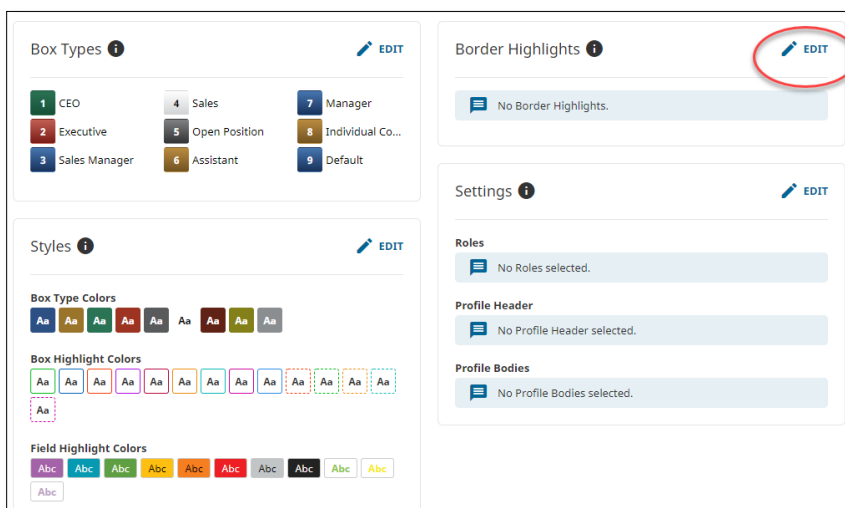
To change the formatting of the field, click on the field. To the right, a panel will open and allow you to make changes.



Adding Border Highlights

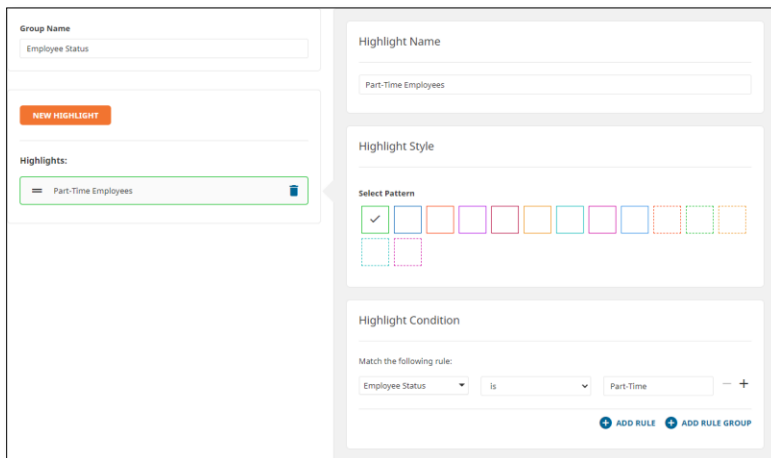
Border highlights are used to highlight certain boxes that fit defined criteria that exists in your data. Examples include highlighting part-time employees, seasonal employees, or employees who reside in a certain location.

To add a highlight condition to the boxes, go to **Border Highlights** then **Edit**.



Create a **New Group** (which will group a bunch of highlights). Name the group then select **New Highlight**. Next, select the **Highlight Style** you would like to apply to the box border. Under **Highlight Condition**, create the rule for OrgPlus to apply.

In this example, the administrator wants to highlight any Part-Time employee's boxes with a green solid border. Anyone in the company whose "employee status" equals "Part-Time" should be included in this category. The Image below adds a rule to demonstrate this configuration.



The screenshot shows the configuration interface for a new highlight. It is divided into two main sections: a left sidebar and a main configuration area.

- Left Sidebar:**
 - Group Name:** A text input field containing "Employee Status".
 - NEW HIGHLIGHT:** An orange button.
 - Highlights:** A list containing one item, "Part-Time Employees", which is highlighted with a green border and has a trash icon to its right.
- Main Configuration Area:**
 - Highlight Name:** A text input field containing "Part-Time Employees".
 - Highlight Style:** A section with a "Select Pattern" row of 12 colored boxes. The first box (green solid) is selected with a checkmark. Below it are two more boxes: a blue dashed and a purple dashed.
 - Highlight Condition:** A section with the text "Match the following rule:". Below it is a rule configuration: "Employee Status" (dropdown) "is" (operator) "Part-Time" (text input). There are minus and plus icons to the right of the text input. At the bottom of this section are two buttons: "ADD RULE" and "ADD RULE GROUP".

Settings

Settings will allow the administrator to:

- Change the name of the view: The name appears in the drop-down box in the view selection in the workspace.
- Add/edit the description: The description will also appear in the drop-down box in the view selection in the workspace under the name of the view.
- Assign a profile header and body: Profile cards are added to a view by assigning a predesigned header and a predesigned body(ies) to the view. Only one header is assigned but multiple bodies can be added. In order for profile headers and bodies to be available for assignment, they must first be created through **Profiles**.

- Assign roles to the view: roles can limit access to views through assignment. In the **Roles** section of settings, add the roles who should be allowed to have access the view.
- Change the default sort of the boxes: Boxes are sorted within the branch based on the unique identifier by default. In **Sort Fields**, the boxes' sort order can be modified to sort by any field, such as name or title.

Adding different Styles

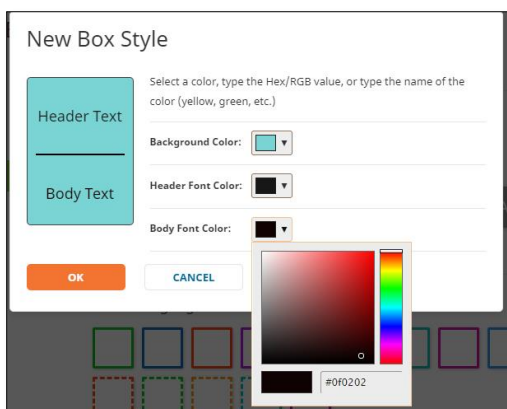
Under **Styles**, box color, border color, and field highlight options can be added or modified. The width of the boxes and the photo layout of the boxes can be adjusted here as well.

Box Styles

OrgPlus RealTime provides 9 default box styles you can apply to box types in your views. Applying different styles to chart views can help differentiate them from each other. In the **Box Styles** section, you can create or edit up to 20 different box styles that can be applied to box types in your view.

To add a box style choice, click on the **Add** button.  **ADD**

Select the color of the box, then select the header and the body text colors. Click **OK** when complete.

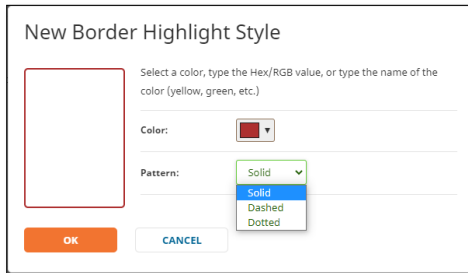


Border Highlights

OrgPlus RealTime provides 9 default box highlight styles you can apply to box highlights in your views. Using box highlights, you can put a 'border' around specific boxes to indicate they meet a specific condition. In the **Styles** page, you can create up to 20 different box highlight styles that can be used in your view.

To add a border highlight choice, click on the **Add** button.  **ADD**

Select the color of the highlight and the pattern of the highlight. Click **OK** when complete.



New Border Highlight Style

Select a color, type the Hex/RGB value, or type the name of the color (yellow, green, etc.)

Color: █ ▼


Pattern: Solid ▼

- Solid
- Dashed
- Dotted

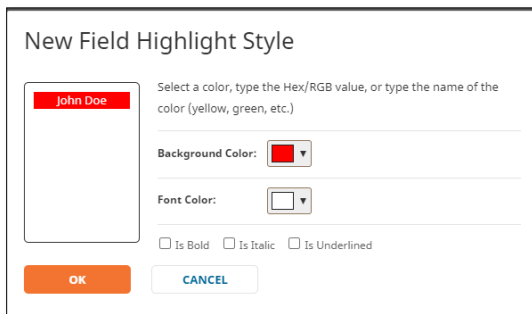
OK **CANCEL**

Field Highlights

OrgPlus RealTime provides 9 default field highlight styles you can apply to fields in your views. Using field highlights, you can ensure specific fields 'stand out' from other fields when they meet a specific condition. In the **Styles** page, you can create up to 20 different field highlight styles that can be used in your view.

To add a field highlight choice, click on the **Add** button.  **ADD**

Select the color of the field highlight background, the font color of the text, and then add any addition formatting you would like to apply. Click **OK** when complete.



New Field Highlight Style

Select a color, type the Hex/RGB value, or type the name of the color (yellow, green, etc.)

Background Color: █ ▼

Font Color: █ ▼

Is Bold Is Italic Is Underlined

OK **CANCEL**

Box Properties

- **Box Width:** Change the width of the box under **Box Properties, Box Width**. By default, the width of the box will adjust based on the length of the text on each box. To adjust the size of all the boxes to have the same fix width, change the **Box Width** from **Automatic** to **Fix** and select the size of the box.
- **Box Layout:** Click the **Header On Top** checkbox to toggle the header position or **Body on Top** for the header to appear at bottom of box. Image on left will change the location of the displayed image to the left side of the box and allow the other fields to display to the right of the image.