

OrgChartHosting

TUTORIAL 1 - VIEWER

OrgChart Now Tutorials

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TUTORIAL 1

OVERVIEW

In this tutorial we will be navigating the OrgChart Viewer.

This training is for both Administrators and End Users.

This tutorial will cover –

- Logging in
- Navigating your chart
- Search functionality
- Export
- Alternating Views

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

OrgChart Viewer is one of the standard modules available in OrgChart Now.

Before we begin, here are some of the benefits of OrgChart Now Viewer:

- Creating, maintaining and sharing accurate org charts at the Enterprise level can be extremely difficult and time consuming. OrgChart Viewer makes this almost effortless.
- OrgChart Viewer allows end users to effortlessly view, navigate, export and print organizational charts. Less than 5 minutes of training required.
- OrgChart is a true enterprise class solution – scales to over 1,000,000 records, connects directly to over 40 HR systems and provides robust control over data access level.

ORGCHART VIEWER – SIGN IN

NOTE:

Often, OrgChart Now Viewer is launched or embedded from within a company's intranet, so you don't have to sign in. For this walk-through, we will use generic credentials.



1

Navigate to the OrgChart website in your browser.

Please ensure you are using an HTML5 browser (Google Chrome, Microsoft Edge, Opera, Mozilla Firefox).

2

Enter your username (email address) and password.

If you do not yet have a password, click on the Reset Password option.

3

Click the Sign In button.

Once you click Sign In, it will take you to the current Master Chart in viewer.

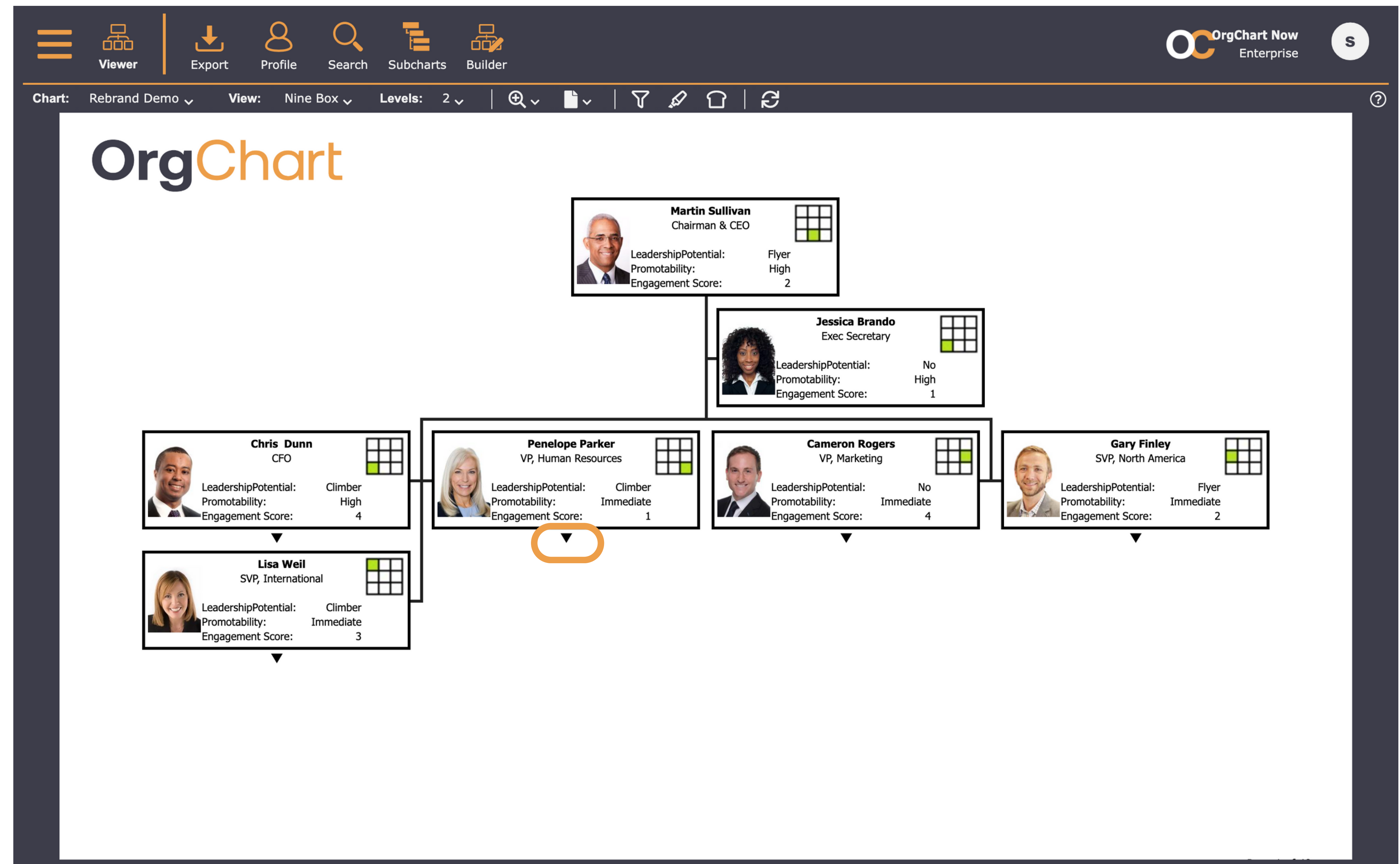
ORGCHART VIEWER – CHART NAVIGATION

Navigate the chart by clicking the arrows above/below the charts boxes.
Using the arrows, you can easily explore the hierarchy within your organization.

1

Click on the arrow below a box/record to navigate down their branch.

To return back to the top of the structure, click on the arrow above the box/record.



ORGCHART VIEWER – EMPLOYEE PROFILES

The Profile (available in the Top Toolbar), displays a baseball-card containing information about a selected employee record. This is useful for viewing additional employee data that is not present in the individual employee boxes.

The screenshot shows the OrgChart Now Enterprise interface. The top toolbar includes icons for Viewer, Export, Profile, Search, Subcharts, and Builder. The main area displays an organizational chart with several employee boxes. A profile panel is open for Cameron Rogers, showing a photo and a table of personal and professional details.

Photo	
FullName	Cameron Rogers
JobTitle	VP, Marketing
Age	64
AuxSuperID	
Budgeted	
Budgeted Salary	\$1,500,000
BusinessUnit	
City	New York, NY
Contractor	
Country	USA
DateOfBirth	April 8, 1945
Department	Marketing
dottedID	
Email	crogers@orgchart.com
EmployeeID	6
EmpStat	A
Engagement Score	4
Ethnicity	Hispanic or Latino

The organizational chart shows the following structure:

- Martin Sullivan** (Chairman & CEO) is at the top.
 - Reports to Martin Sullivan:
 - Jessica Brando** (Exec Secretary)
 - Penelope Parker** (VP, Human Resources)
 - Cameron Rogers** (VP, Marketing)
 - Gary Finley** (SVP, North America)
 - Lisa Weil** (SVP, International)

1 Click on the box of the employee you wish to view the profile of.

2 Click on the Profile icon on the top toolbar.

3 You will then see the Profile panel. The Profile fields can be edited/defined in your Chart Settings.

ORGCHART VIEWER – CHART LEVELS

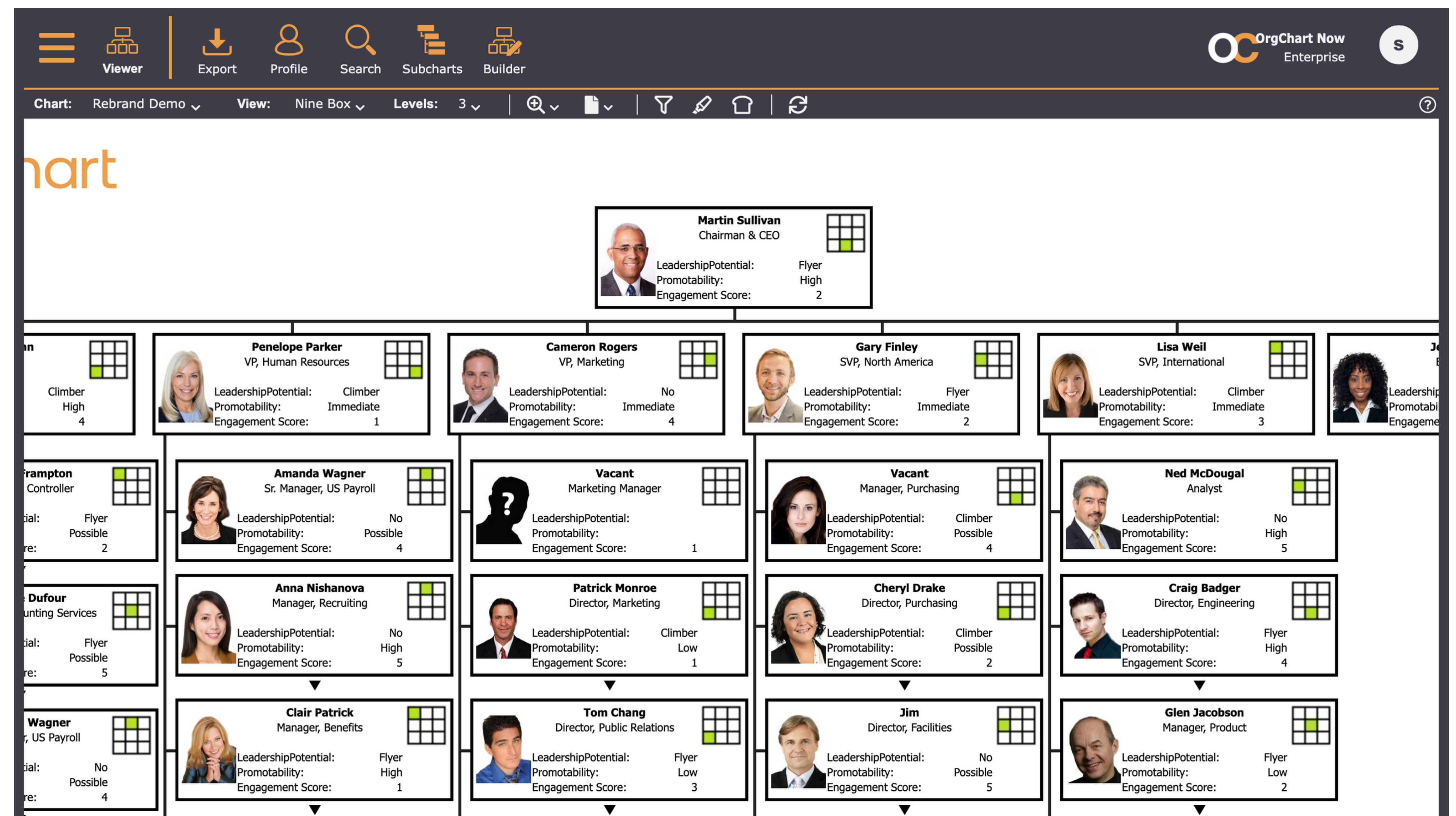
The next navigation tool is the Level Selector.
The Level Selector allows you to control how many chart levels are displayed on the screen.

1 Click on the Levels drop-down.

2 Select the Levels you wish to view

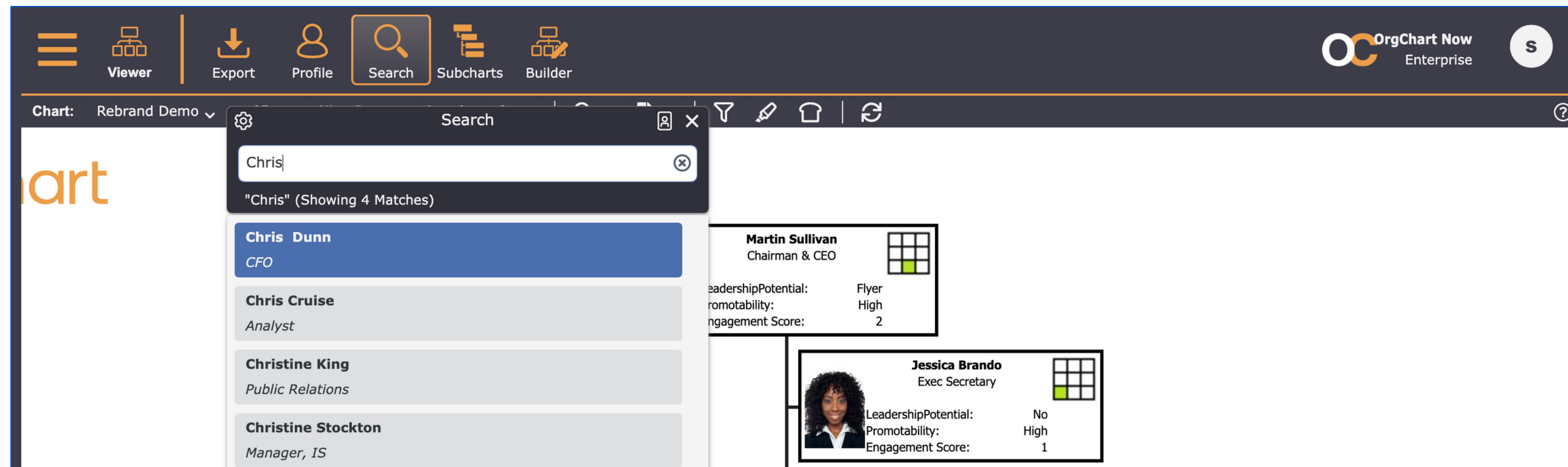
3 Now the Levels should be shown on screen.

This screenshot is an example of 3 Levels, as selected.



ORGCHART VIEWER – SEARCH

The Search function is used to find a specific record in a Master Chart or Chart Document.

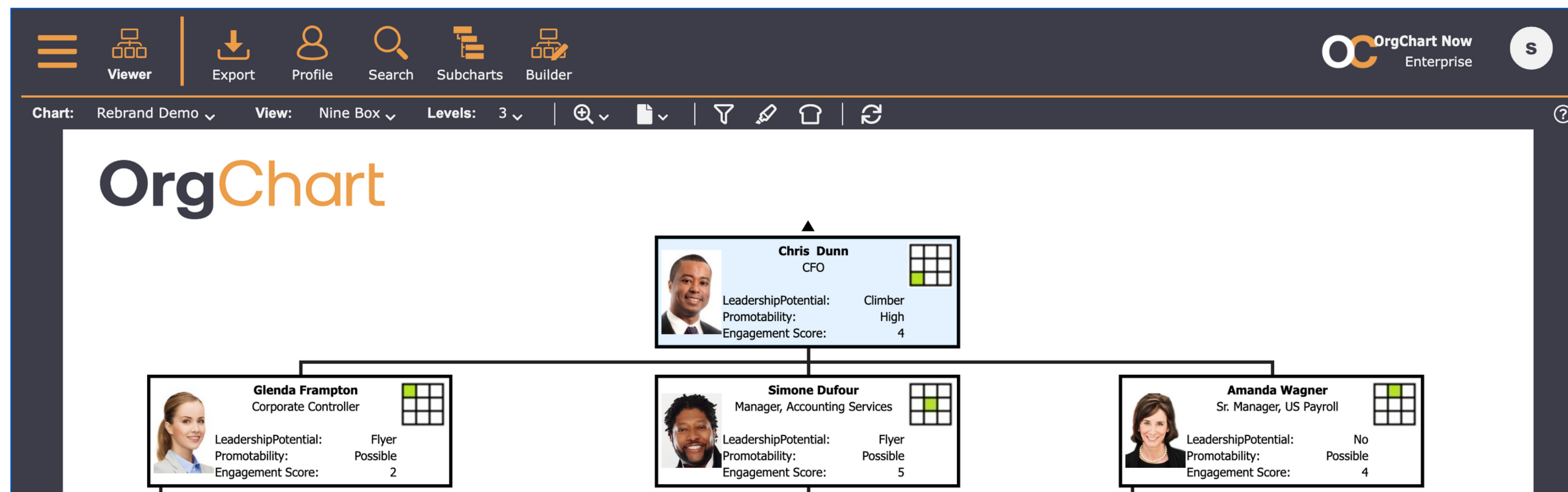


1 Click on the Search button

2 Enter the name of the employee you wish to search for and click on the corresponding result.

For this example we will search for 'Chris'

3 You will then jump to the searched for employee and their corresponding branch/structure.



ORGCHART VIEWER – EXPORT TO PDF

OrgChart allows you to export your charts to a number of different formats including PDF and PowerPoint.

1

Click on the Export button and select the PDF Document option.

2

For this example we will only download Chris' branch.

Click the Download This Branch option.

3

The PDF file will save into your Download folder unless you have specified otherwise.

The PDF folder allows you to dynamically navigate within the PDF document, using the drill up/down arrows (below/above chart boxes).

The screenshot displays the OrgChart Now Enterprise interface. The top navigation bar includes icons for Viewer, Export, Profile, Search, Subcharts, and Builder. The 'Export' menu is open, showing options: PDF Document (highlighted), PPT Document, PNG Image, SVG Image, JPG Image, Excel Spreadsheet, Web Link, and Print Current Screen. Below the menu, an organizational chart is visible with the following structure:

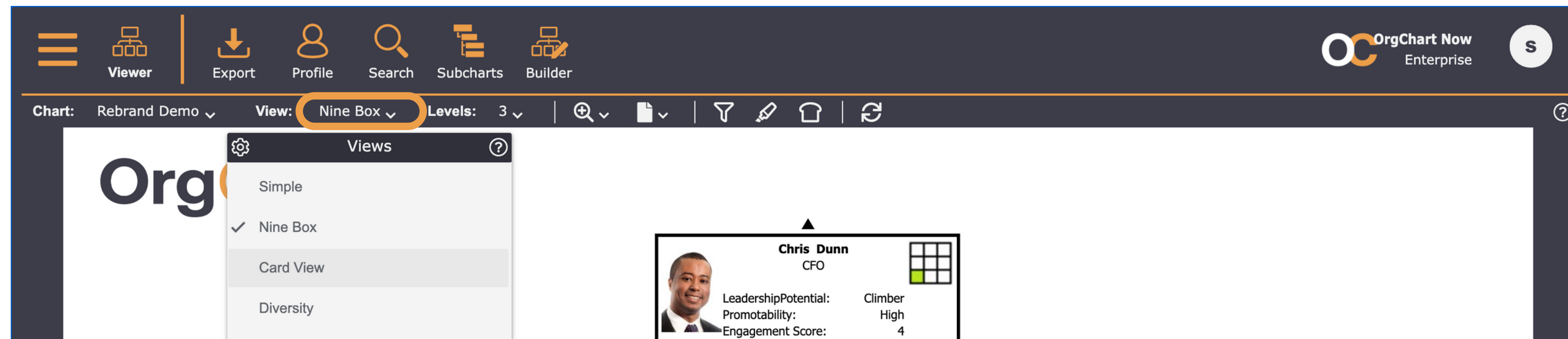
- Chris Dunn** (CFO)
 - Simone Dufour** (Manager, Accounting Services)
 - Glenda Frampton** (Corporate Controller)
 - Amanda Wagner** (Sr. Manager, US Payroll)

Each employee card includes a grid for Leadership Potential, Promotability, and Engagement Score. For example, Chris Dunn has Leadership Potential: Climber, Promotability: High, and Engagement Score: 4.

Below the main screenshot, a smaller version of the chart shows the 'Download This Branch' option selected for the branch starting with Chris Dunn. A vertical sidebar on the left shows three thumbnails of the chart, with the first one (labeled '1') highlighted, indicating the current view.

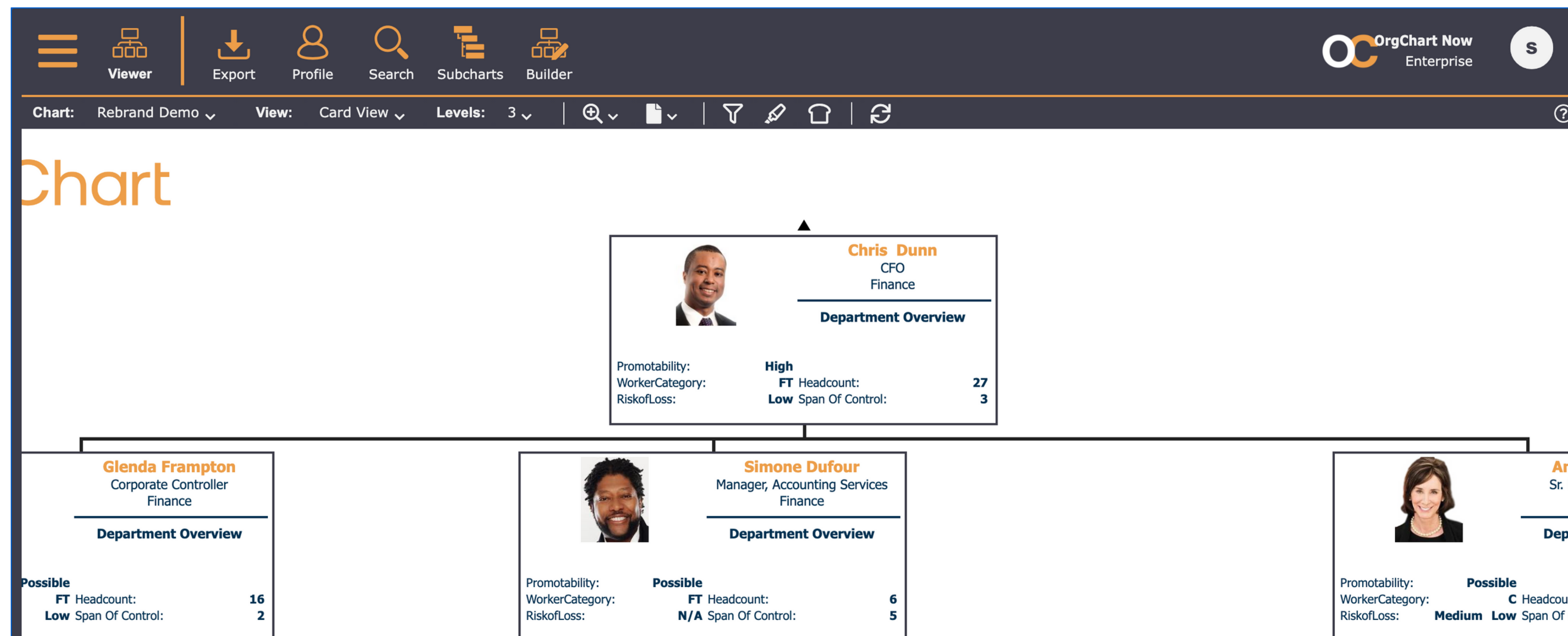
ORGCART VIEWER – CHART VIEWS

Views allow you to switch between different org chart presentations.
 Views are rule driven and can be customized as needed to meet your business requirements.
 *NOTE - The views presented in the below images are demo/example views.



1 Click on the View drop-down and select the view you wish to navigate to.

For this example we will be clicking on the Card View.



2 The view will then auto-apply to your chart to show you the information designed to be displayed in that specific view.

ORGCHART VIEWER – HIGHLIGHTS

Users can highlight records in of the Master Chart while navigating in Viewer or Workbench mode. For example, you can highlight 'Remote Workers' to easily locate them in the chart.

1

Click on the Highlight option. The Highlights panel will open on the right-hand side of the screen.

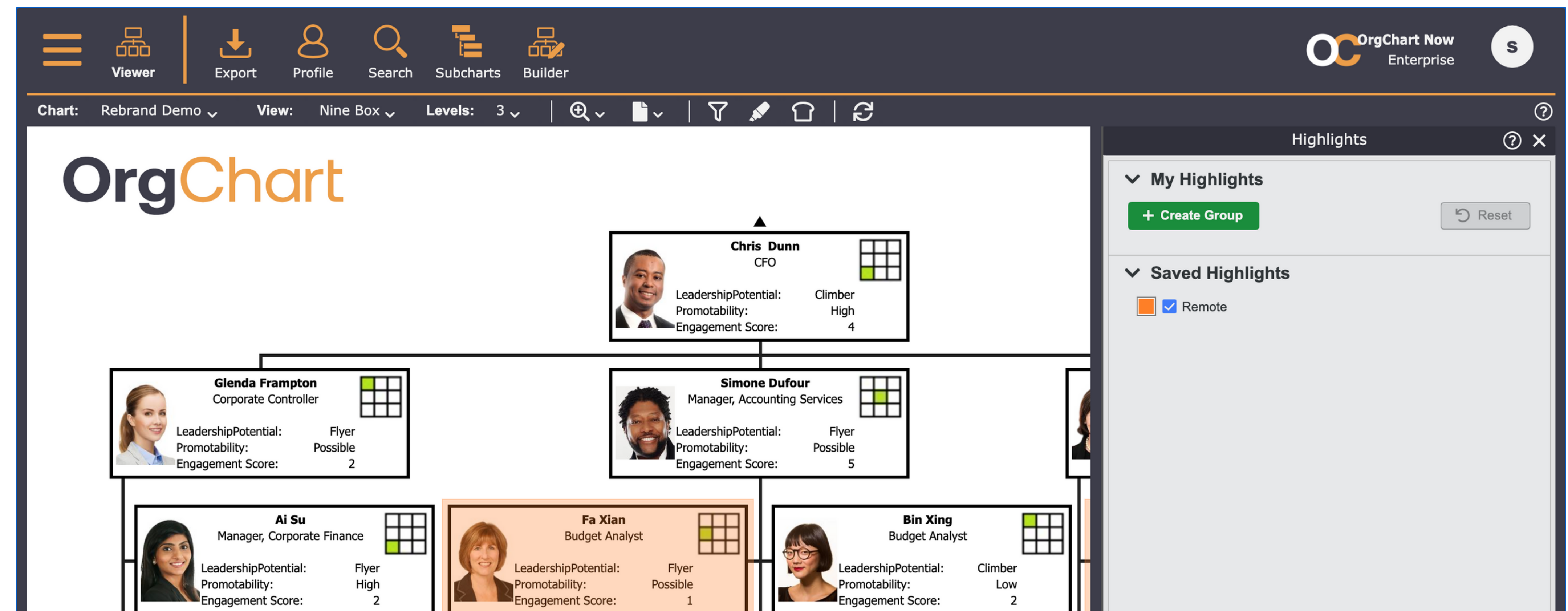
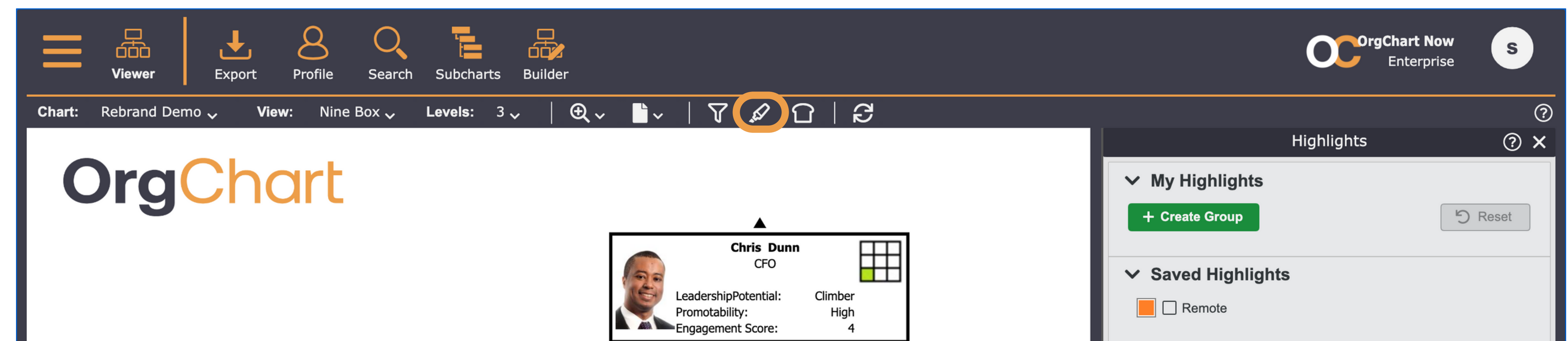
2

Click on the tickbox next to the Saved Highlight.

3

Any records/employees that match the highlight criteria will be highlighted in your chart.

You can create saved Highlights during the implementation process, or create your own highlights using the interactive filtering.



ORGCHART VIEWER – CHART VIEWS

Users can filter records in and out of the Master Chart while navigating in Viewer or Workbench mode.

1 Click on the Filter option. The Filter panel will open on the right-hand side of the screen.

2 Click on the tickbox next to the Saved Filter.

3 Any records/employees that match the highlight criteria will be 'Muted' in your chart.

If you wish to full remove the record, click on the Remove button in your Filters panel.

CONCLUSION

END OF TUTORIAL 1

In this interactive tutorial, we covered some of the key features of OrgChart Viewer: Profiles, Navigation, Search, Export, View Selection, Highlights and Filters.

In the next tutorial we will learn about navigating the OrgChart Builder and Workbench to create custom org charts and workforce plans.



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make informed people decisions.**

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