

OrgChartHosting

TUTORIAL 2 – WORKBENCH/BUILDER

OrgChart Now Tutorials

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TUTORIAL 2

OVERVIEW

In this tutorial we will be navigating the OrgChart Workbench/Builder.

This training is for both Administrators and End Users.

This tutorial will cover –

- Creating A Chart With Builder
- Saving Chart Documents
- Subchart Breaks
- Editing Workbench Charts
- Exporting Workbench Charts

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

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

The OrgChart Viewer displays the current master chart.

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

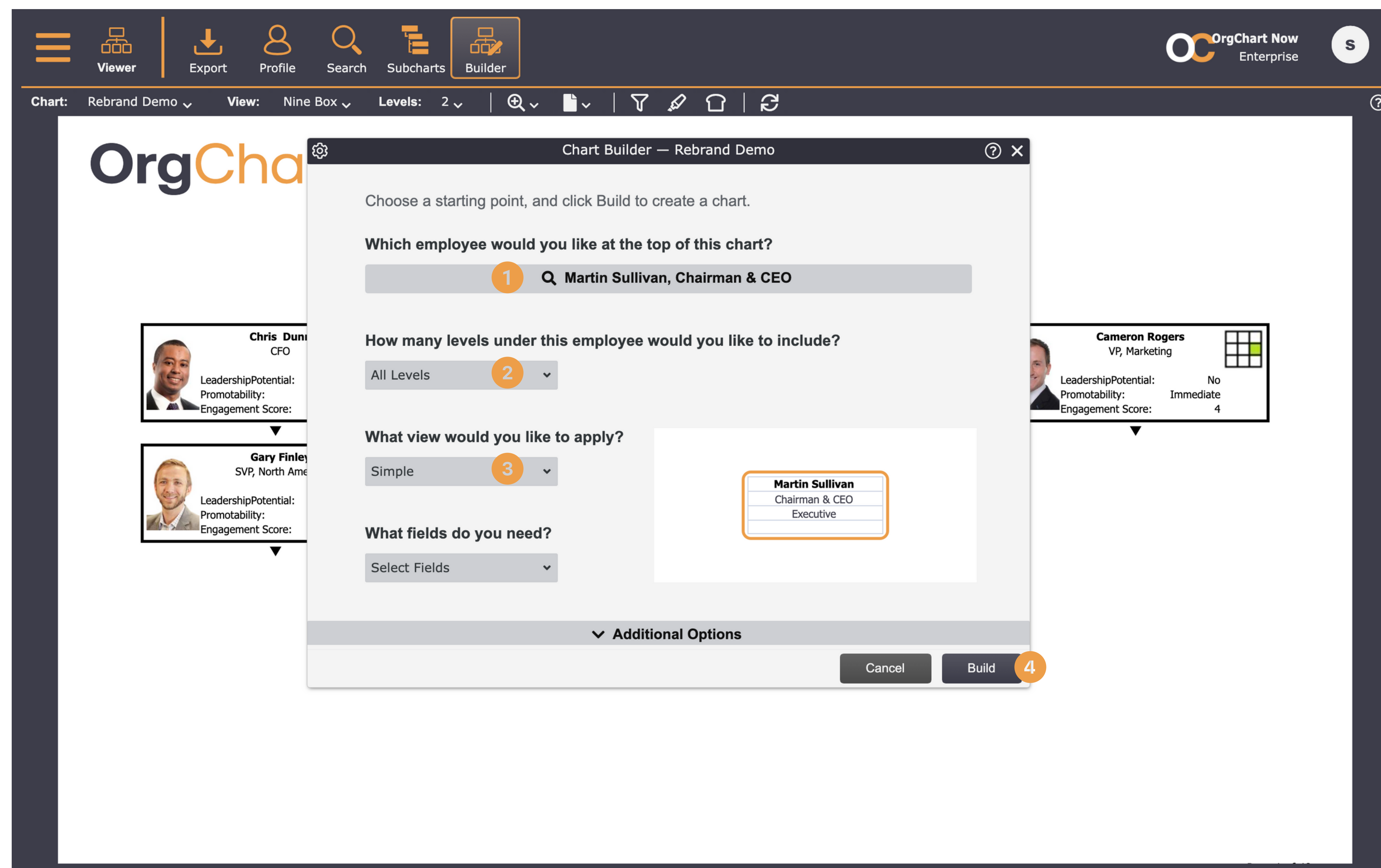
The Chart Builder allows you to take a snapshot of any subset of your master chart.

This snapshot is the starting point for a workforce plan.

ORGCHART WORKBENCH/BUILDER – OPEN BUILDER

Builder allows users to take a snapshot of any subset of a Master Chart. Snapshots created using Builder are loaded into [Workbench](#) as Chart Documents.

Administrators and Read/Write users can modify Chart Documents as needed. Chart Documents can be saved, opened, closed, exported, and even synchronized with source data.



Click on the Builder button on the top toolbar.

A panel will pop up asking you to specify the criteria of the chart you wish to pull into Builder.

- 1 This is the 'Build On' selector. This allows you to search or specify the employee/record that is to be the top of your new chart in Builder. Click on the bar, search the record and select the new record.
- 2 Click the drop-down to specify how many levels of the chart you wish to pull into the Builder for editing.
- 3 Click the drop-down to apply a specific view to make editing or publishing easier.
- 4 Click the Build button to create the new chart.

ORGCHART WORKBENCH/BUILDER – SAVING YOUR PLAN

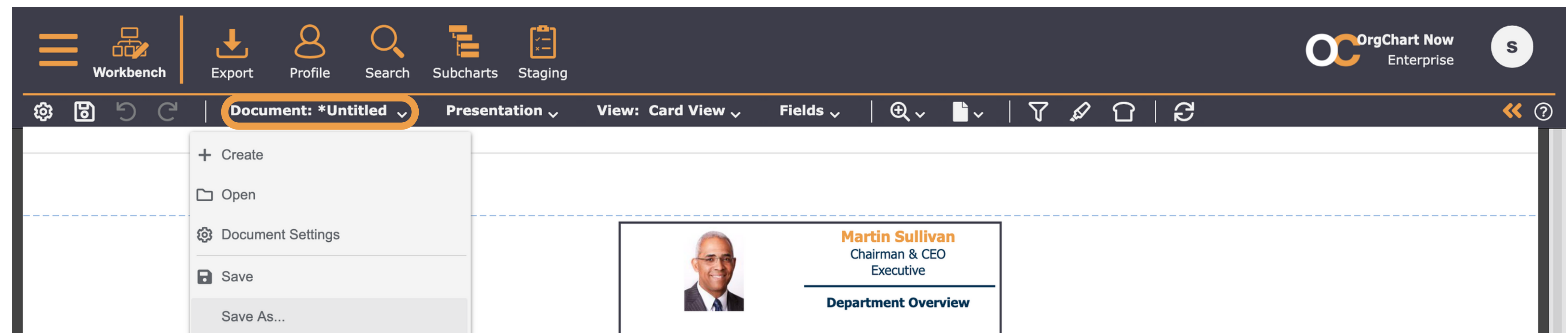
You are now working on your own copy of the chart to manipulate for planning purposes or creating “What-If” scenarios.

NOTE:

You can return to the Viewer at any time by clicking on the menu icon  and selecting the Viewer option.

1

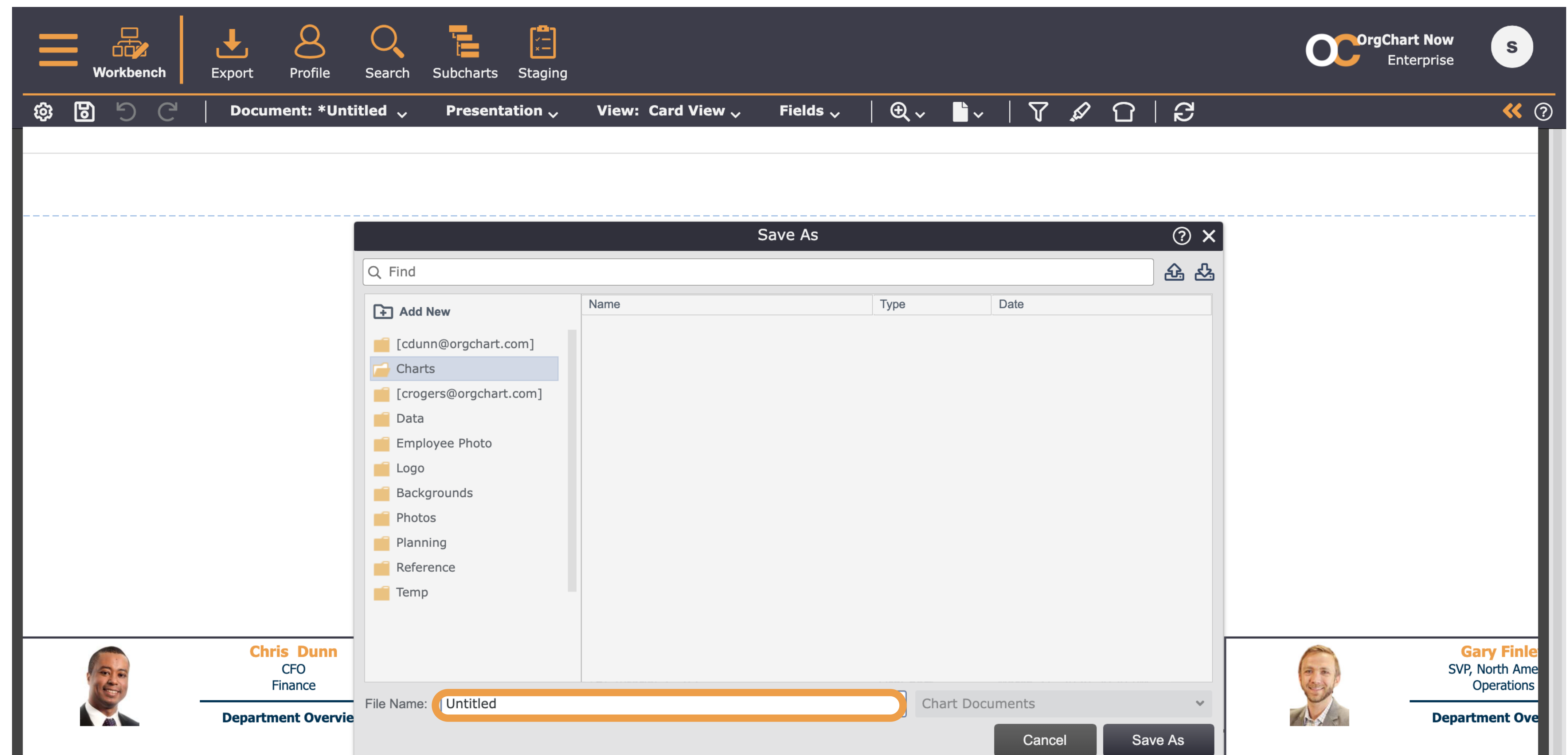
Click on the Document drop-down and select the Save As... option.



2

Enter the name for the new chart and click the Save As button.

It is best practice to save all charts in the 'Chart' folder, or in your own folder if you have an employee specific folder system.



ORGCHART WORKBENCH/BUILDER – SUBCHART BREAKS

Subcharts are the 'breaks' between levels or branches.
The small black arrow beneath a box indicates that there is a subchart break.
You can add or remove subchart breaks within the Builder.

The screenshot displays the OrgChart Now Enterprise Workbench interface. At the top, there is a navigation bar with icons for Workbench, Export, Profile, Search, Subcharts, and Staging. Below this is a toolbar with various editing tools. The main workspace shows an organizational chart with the following structure:

- Chairman & CEO
 - Martin Sullivan (Chairman & CEO Executive)
 - Jessica Brando (Exec Secretary Executive)
 - Chris Dunn (CFO, Finance)
 - Penelope Parker (VP, Human Resources)
 - Cameron Rogers (VP, Marketing Marketing)
 - Gary Finley (SVP, North America Operations)

A context menu is open over the box for Lisa V (SVP, International Technology). The menu items are: Box Properties, Branch Styles, Insert Subchart Break, Remove Subchart Break (highlighted with an orange border), Add Subordinate Box, Add Assistant, Cut, Copy, Copy Format, Paste, and Delete. A legend in the top right corner indicates that 'P' stands for Part Time and 'C' for Contractor.

1 Right-click on a box/employee and select 'Remove Subchart Break' to expand that specific branch on the page.

ORGCHART WORKBENCH/BUILDER – SUBCHART BREAKS

Subcharts are the 'breaks' between levels or branches.
The small black arrow beneath a box indicates that there is a subchart break.
You can add or remove subchart breaks within the Builder.

OrgChart Now Enterprise

Document: *Untitled Presentation View: Simple Fields

Chairman & CEO

Martin Sullivan
Chairman & CEO
Executive

Jessica Brando
Exec Secretary
Executive

Chris Dunn
CFO
Finance

Penelope Parker
VP, Human Resources
Human Resources

Cameron Rogers
VP, Marketing
Marketing

Gary Finley
SVP, North America
Operations

Simone Dufour
Manager, Accounting Services
Finance

Glenda Frampton
Corporate Controller
Finance

Amanda Wagner
Sr. Manager, US Payroll
Finance
Also Reports To: Penelope Parker

Lisa Weil
SVP, International
Technology

Box Properties
Branch Styles
Insert Subchart Break
Remove Subchart Break
Add Subordinate Box
Add Assistant
Cut
Copy
Copy Format
Paste
Delete

Page 1 of 11

2 Right-click on the box/employee and select 'Insert Subchart Break' to collapse that specific branch on the page.

ORGCHART WORKBENCH/BUILDER – FORMATTING BOXES

Delete boxes or edit the contents of the boxes in your chart.

1

Click on the arrow icon on the top-right of the screen to open the Chart Editor panel.

The screenshot displays the OrgChart Now Enterprise software interface. The main workspace shows an organizational chart with the following structure:

- Chairman & CEO:** Martin Sullivan (Chairman & CEO Executive)
- VP, Human Resources:** Penelope Parker (VP, Human Resources Human Resources)
- VP, Marketing:** Cameron (VP, Marketing)
- CFO:** Chris Dunn (CFO Finance)
- Finance Department:**
 - Glenda Frampton (Corporate Controller Finance)
 - Simone Dufour (Manager, Accounting Services Finance)
 - Cecil Chartrand (Analyst Finance)
 - Bruce Alvarado (Analyst Finance)
 - Ben Werner (Analyst Finance)
 - Bin Xing (Budget Analyst Finance)
 - Fa Xian (Budget Analyst Finance)
 - Amanda Wagner (Sr. Manager, US Payroll Finance)

The Chart Editor panel on the right is open, showing various formatting options:

- Tools:** Move Box, Add Box, Add Assistant
- Layout:** Branch Styles, Box Sort, Optimize Page, Box Spacing, Center Horiz, Center Vert, Align Top
- Subcharts:** Insert, Remove, Wizard
- Box:** Layout, Box Shape, Box Color, Shadow, Border Style, Border Color
- Text:** (options not fully visible)

ORGCHART WORKBENCH/BUILDER – FORMATTING BOXES

Delete boxes or edit the contents of the boxes in your chart.

2

Deleting Boxes:
Right-click on a record and select 'Delete' to remove that record from your chart.

In this image we will be deleting Fa Xian.

The screenshot displays the OrgChart Now Enterprise software interface. The main workspace shows an organizational chart with several nodes. A context menu is open over the 'Fa Xian' node, with the 'Delete' option highlighted. The 'Chart Editor' panel on the right contains various tool categories: Tools (Move Box, Add Box, Add Assistant), Layout (Branch Styles, Box Sort, Optimize Page, Box Spacing, Center Horiz, Center Vert, Align Top), Subcharts (Insert, Remove, Wizard), Box (Layout, Box Shape, Box Color, Shadow), and Text (Border Style, Border Color). The top navigation bar includes icons for Workbench, Export, Profile, Search, Subcharts, and Staging. The top status bar shows 'Document: *Untitled', 'Presentation', 'View: Simple', and 'Fields'.

ORGCHART WORKBENCH/BUILDER – FORMATTING BOXES

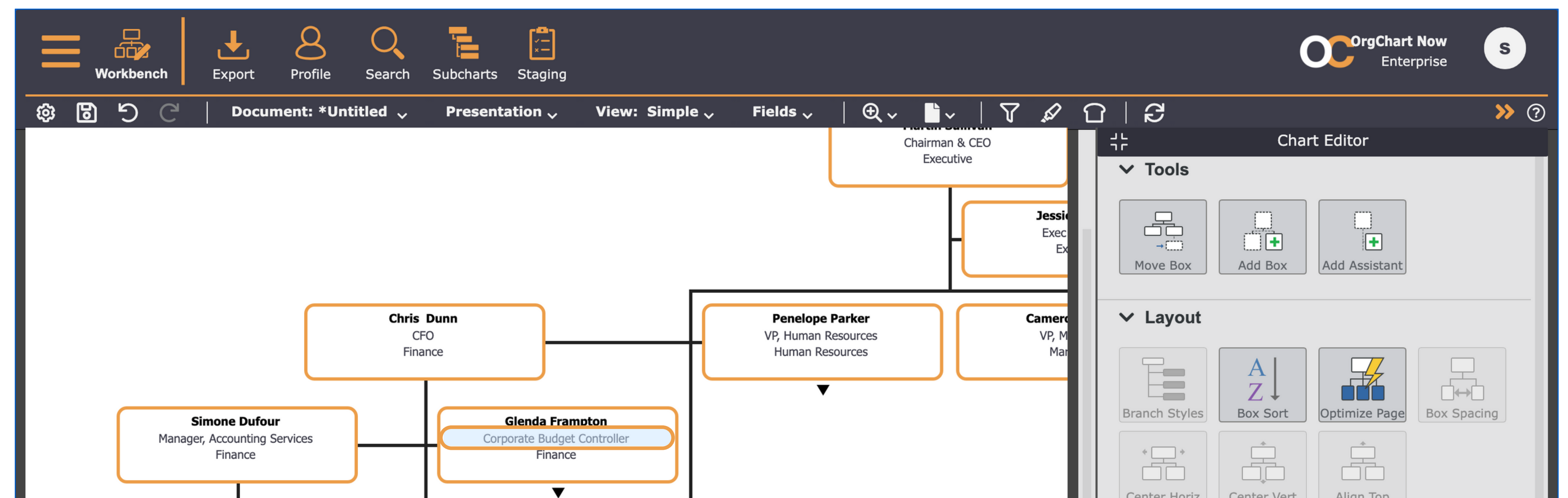
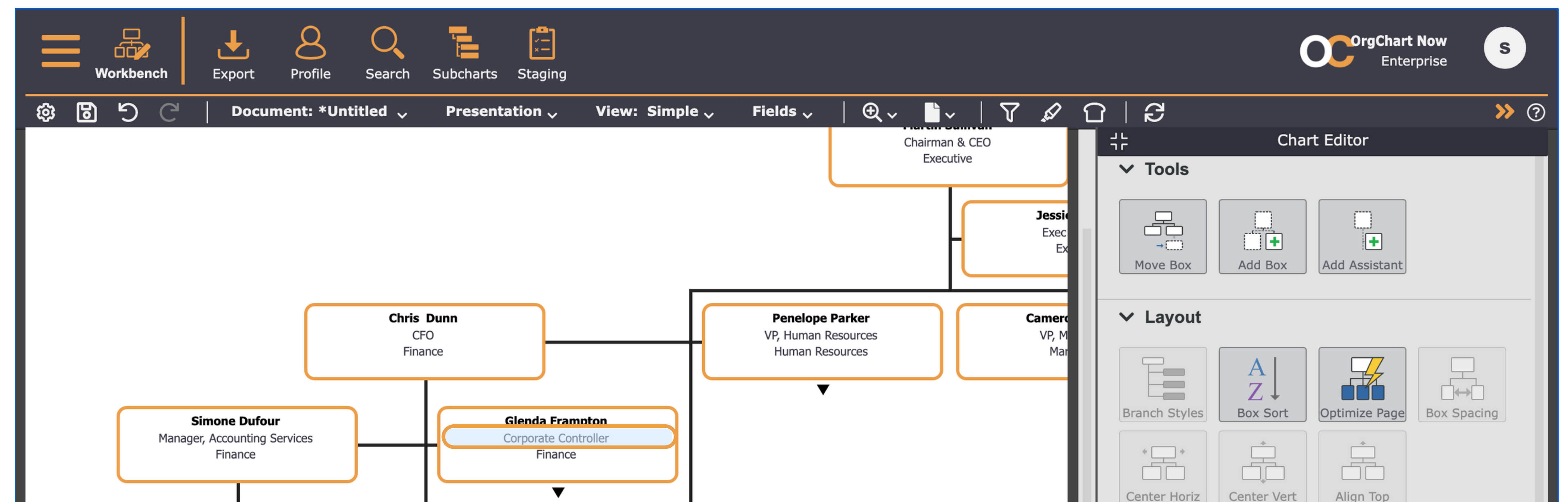
Delete boxes or edit the contents of the boxes in your chart.

3

Editing Boxes:
To edit the contents INSIDE of a box, double-click on the field you wish to edit.

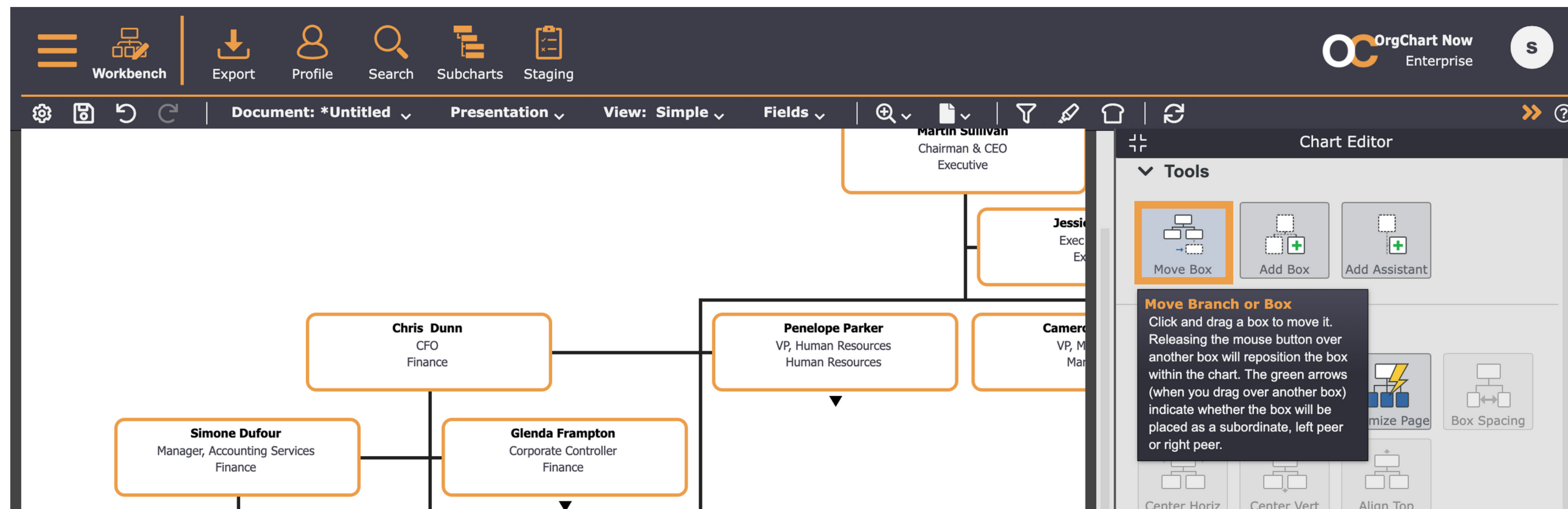
4

Type in the new or updated information for the record and hit Enter on your keyboard to apply that change.



ORGCHART WORKBENCH/BUILDER – MOVING BOXES

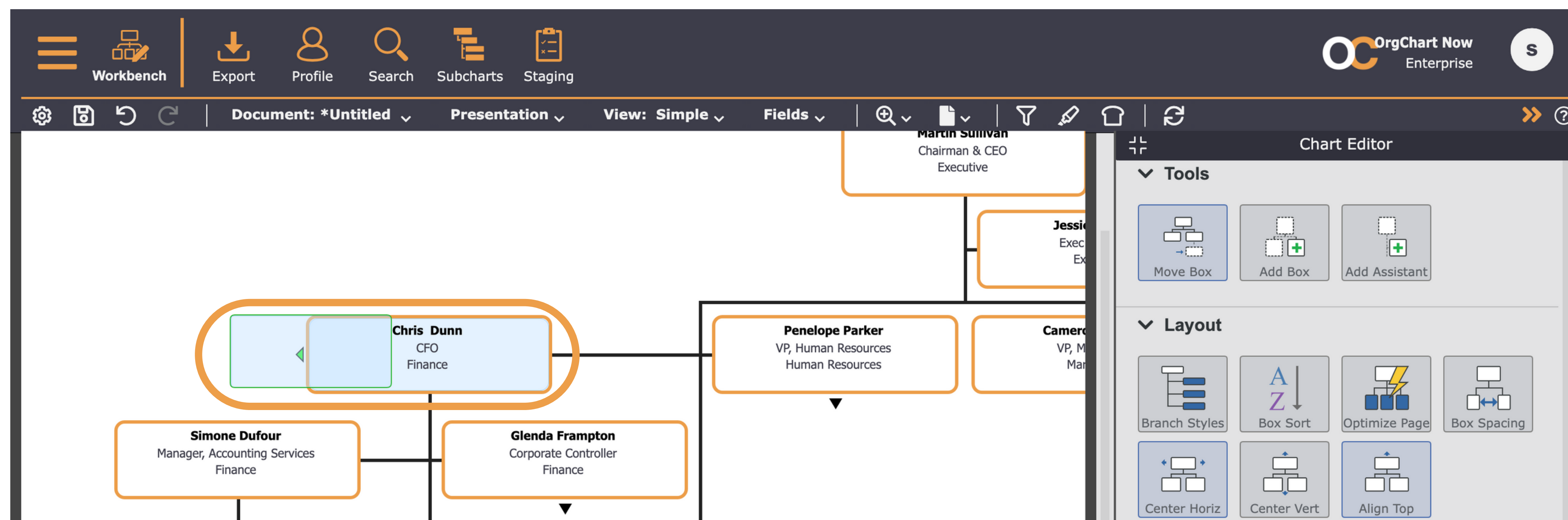
Reorganize your chart or change your reporting structure by moving boxes to new managers or departments.



1

Moving Boxes:
Click on the Move Box button in the chart editor and drag and drop your record to the desired position.

You will notice arrow above, below or next to the record you wish to move your box to. When these arrows appear you can release your mouse to place your record.



ORGCHART WORKBENCH/BUILDER – ADDING BOXES

Add new upcoming positions or new hires in your chart planning.

1 Right-click on the record you wish to add a new box/subordinate to, click Add Subordinate Box.

2 If working with a specific view, any new boxes added should have the view auto-applied.

The screenshot displays the OrgChart Now Enterprise software interface. The main workspace shows an organizational chart with the following structure:

- Chairman & CEO Executive** (top level)
- Jessica Brando Exec Secretary Executive** (reporting to Chairman & CEO)
- Penelope Parker VP, Human Resources Human Resources** (reporting to Chairman & CEO)
- Cameron Rogers VP, Marketing Marketing** (reporting to Chairman & CEO)
- Gary Finley SVP, North America Operations** (reporting to Chairman & CEO)
- Chris Dunn CFO Finance** (reporting to Penelope Parker)
- Glenda Frampton Corporate Budget Controller Finance** (reporting to Chris Dunn)
- Simone Dufour Manager, Accounting Services Finance** (reporting to Glenda Frampton)
- Cecil Chartrand Analyst Finance** (reporting to Simone Dufour)
- Bruce A Analyst Finance** (reporting to Simone Dufour)
- Ben Werner Analyst Finance** (reporting to Cecil Chartrand)
- Bin X Budget Finance** (reporting to Cecil Chartrand)

A context menu is open over the **Simone Dufour** node, with the **Add Subordinate Box** option highlighted. The menu includes the following options:

- Box Properties
- Branch Styles
- Insert Subchart Break
- Remove Subchart Break
- Add Subordinate Box** (highlighted)
- Add Assistant
- Cut
- Copy
- Copy Format
- Paste
- Delete

The software interface includes a top navigation bar with icons for Workbench, Export, Profile, Search, Subcharts, and Staging. The right-hand side features a **Chart Editor** panel with the following sections:

- Tools:** Move Box, Add Box, Add Assistant
- Layout:** Branch Styles, Box Sort, Optimize Page, Box Spacing, Center Horiz, Center Vert, Align Top
- Subcharts:** Insert, Remove, Wizard
- Box:** Layout, Box Shape, Box Color, Shadow, Border Style, Border Color
- Text:** (Section header visible)

ORGCHART WORKBENCH/BUILDER – ADDING BOXES

Add new upcoming positions or new hires in your chart planning.

2

If the View did not auto-apply, Click the Presentation drop-down and select the Chart View option.

A Chart Views panel will pop up on the right-side of the screen.

Double-click the relevant view to apply it.

The screenshot displays the OrgChart Now Enterprise Workbench interface. The main area shows an organizational chart with the following structure:

- Jessica Brando** (Exec Secretary, Executive) is at the top level.
- Reporting to Jessica Brando are:
 - Penelope Parker** (VP, Human Resources, Human Resources)
 - Cameron Rogers** (VP, Marketing, Marketing)
 - Gary Finley** (SVP, North America, Operations)
- Reporting to Penelope Parker are:
 - Chris Dunn** (CFO, Finance)
 - Amanda Wagner** (Sr. Manager, US Payroll, Finance) with the note "Also Reports To: Penelope Parker"
- Reporting to Chris Dunn are:
 - Glenda Frampton** (Corporate Budget Controller, Finance)
 - Simone Dufour** (Manager, Accounting Services, Finance)
- Reporting to Simone Dufour are:
 - Cecil Chartrand** (Analyst, Finance)
 - Bruce Alvarado** (Analyst, Finance)
 - Ben Werner** (Analyst, Finance)
 - Bin Xing** (Budget Analyst, Finance) with a 'P' icon
- There is also a placeholder box labeled "<FullName>" reporting to Bruce Alvarado.

The interface includes a top navigation bar with icons for Workbench, Export, Profile, Search, Subcharts, and Staging. A secondary toolbar contains icons for settings, undo, redo, zoom, and other chart manipulation tools. The right-hand side features a "Chart Views" panel with a list of view options: Performances, Dept. Budgeted Salary, Diversity, Workforce Analytical, Grouping, Card View, Nine Box, Time Zones, Hybrid Workforce, **Simple** (highlighted in red), Simple Filled, and Swimlanes. At the bottom right, there are radio buttons for "Page Layout" and "Box Formatting", each with "Automatic" and "Manual" options.

ORGCHART WORKBENCH/BUILDER – BRANCH STYLES

Change the branch style for the branch of the selected box.

The screenshot displays the OrgChart Now Enterprise interface. The main area shows an organizational chart with the following structure:

- Jessica Brando (Exec Secretary, Executive)
 - Penelope Parker (VP, Human Resources, Human Resources)
 - Chris Dunn (CFO, Finance)
 - Glenda Frampton (Corporate Budget Controller, Finance)
 - Simone Dufour (Manager, Accounting Services, Finance)
 - Cecil Chartrand (Analyst, Finance)
 - Bruce Alvarado (Analyst, Finance)
 - Amanda Wagner (Sr. Manager, US Payroll, Finance)
 - Also Reports To: Penelope Parker
 - Cameron Rogers (VP, Marketing, Marketing)
 - Gary Finley (SVP, North America, Operations)

The Chart Editor panel on the right includes sections for Tools, Layout, Box, and Text. The 'Layout' section has the 'Branch Styles' icon highlighted. Below it, a 'Select Branch Style' grid shows various options, with 'Tree' selected. The 'Box' section contains options for Layout, Box Shape, Box Color, Shadow, Border Style, and Border Color.

1 Click on one of the boxes within the branch you would like to change the style of.

2 Click the Branch Styles icon and select the new style you wish to apply to the branch.

3 You can also edit branch styles by right-clicking on the record and selecting the Branch Style option.

ORGCHART WORKBENCH/BUILDER – CUT & PASTE

1 Right-click on the box you wish to cut and select the Cut option.

The screenshot displays the OrgChart Now Enterprise interface. At the top, there is a navigation bar with icons for Workbench, Export, Profile, Search, Subcharts, and Staging. Below this is a secondary toolbar with icons for document management, view settings, and editing. The main area shows an organizational chart with several levels of hierarchy. A context menu is open over the 'Cecil Chartrand' box, listing options such as Box Properties, Branch Styles, Insert Subchart Break, Remove Subchart Break, Add Subordinate Box, Add Assistant, Cut, Copy, Copy Format, Paste, and Delete. The 'Cut' option is highlighted with an orange border. The chart includes boxes for various roles like Penelope Parker (VP, Human Resources), Chris Dunn (CFO), Glenda Frampton (Corporate Budget Controller), Amanda Wagner (Sr. Manager, US Payroll), Simone Dufour (Manager, Accounting Services), Cecil Chartrand (Analyst), Bruce Al (Analyst), Vaca (Vacant), Ben W (Analyst), Bin Xi (Budget / Analyst), Cameron Rogers (VP, Marketing), Gary Finley (SVP, North America Operations), Lisa Weil (SVP, International Technology), Craig Badger (Director, Engineering), Kris Kendall (Director, Information Systems), Glen Jacobson (Manager, Product Technology), and Ned McDougal (Analyst, Marketing). The 'Also Reports To' field for Amanda Wagner is set to Penelope Parker, and for Ned McDougal, it is set to Rui Meng.

ORGCHART WORKBENCH/BUILDER – CUT & PASTE

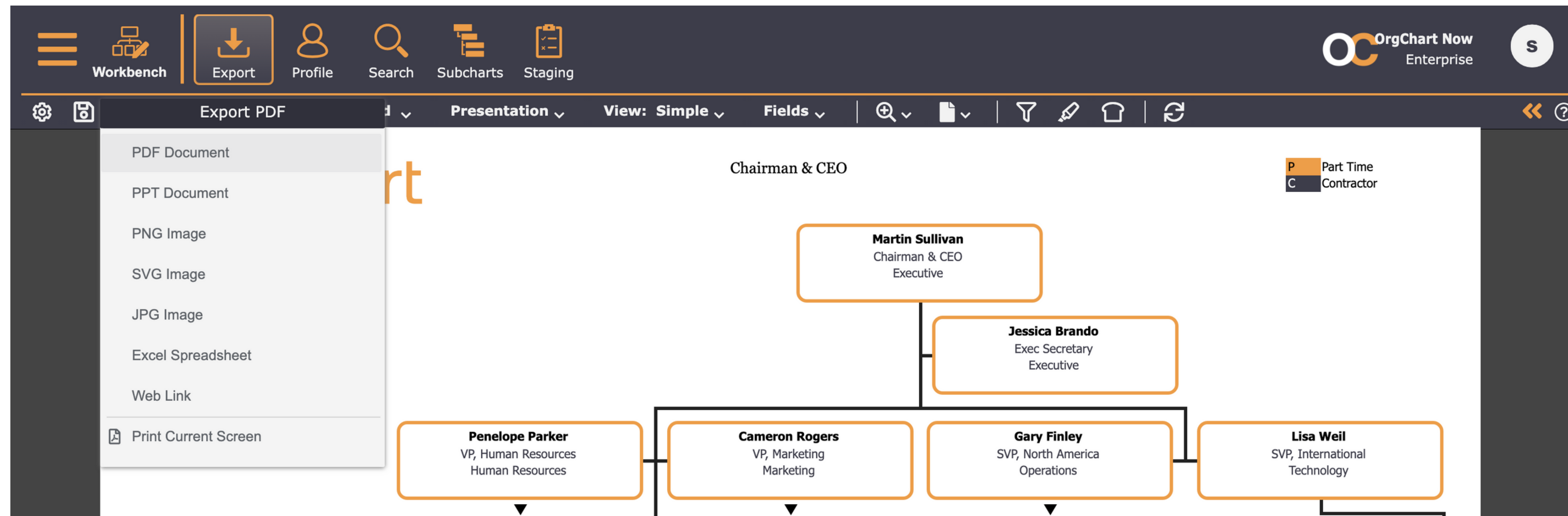
2

Right-click on the manager of the new branch you wish to add the cut record to, and select the Paste option.

The screenshot displays the OrgChart Now Enterprise interface. At the top, there is a navigation bar with icons for Workbench, Export, Profile, Search, Subcharts, and Staging. Below this is a toolbar with various editing tools. The main area shows an organizational chart with several nodes. A context menu is open over the 'Amanda Wagner' node, which is highlighted. The menu options are: Box Properties, Branch Styles, Insert Subchart Break, Remove Subchart Break, Add Subordinate Box, Add Assistant, Cut, Copy, Copy Format, Paste (highlighted with an orange border), and Delete. The chart shows a hierarchy starting with Jessica Brando at the top, followed by Penelope Parker, Cameron Rogers, and Gary Finley. Penelope Parker has a subordinate Chris Dunn, who in turn has three subordinates: Glenda Frampton, Amanda Wagner, and Simone Dufour. Amanda Wagner has a note 'Also Reports To: Penelope Parker'. Simone Dufour has three subordinates: Bruce Alvarado, Vacant, and Ben Werner. Bruce Alvarado has a subordinate Bin Xing. The interface also shows a 'Page 1 of 11' indicator at the bottom right.

ORGCHART VIEWER – EXPORT YOUR PLAN

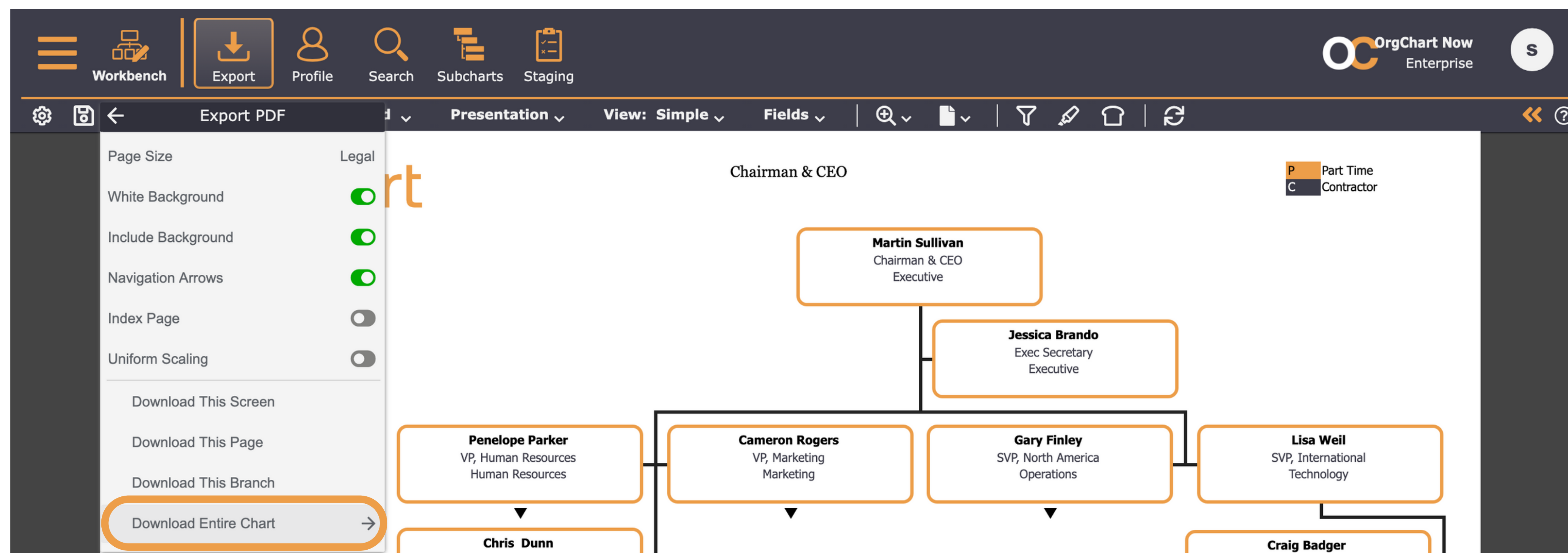
OrgChart allows you to export your charts to a number of different formats including PDF and PowerPoint.



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

2 Select the Download Entire Chart 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).

CONCLUSION

END OF TUTORIAL 2

In this interactive tutorial, we covered some of the key features of OrgChart Builder: Builder panel, Saving your chart, Subchart breaks, Box formatting, Moving boxes, Adding boxes and Branch styles.

In the next tutorial we will learn about creating a chart manually with Workbench.



OrgChartHosting

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make informed people decisions.**

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