

OrgChartHosting

TUTORIAL 4- IMPORT WIZARD

OrgChart Now Tutorials

VERSION 1 - PREPARED BY ORGCHART HOSTING - 02.24

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TUTORIAL 4

OVERVIEW

In this tutorial we will be navigating the OrgChart Workbench – Import Wizard.

This training is for both Administrators and End Users.

This tutorial will cover –

- Import Wizard
- File Upload & Download
- Applying Views
- Applying Backgrounds
- Refresh Settings

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

OrgChart Workbench 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.

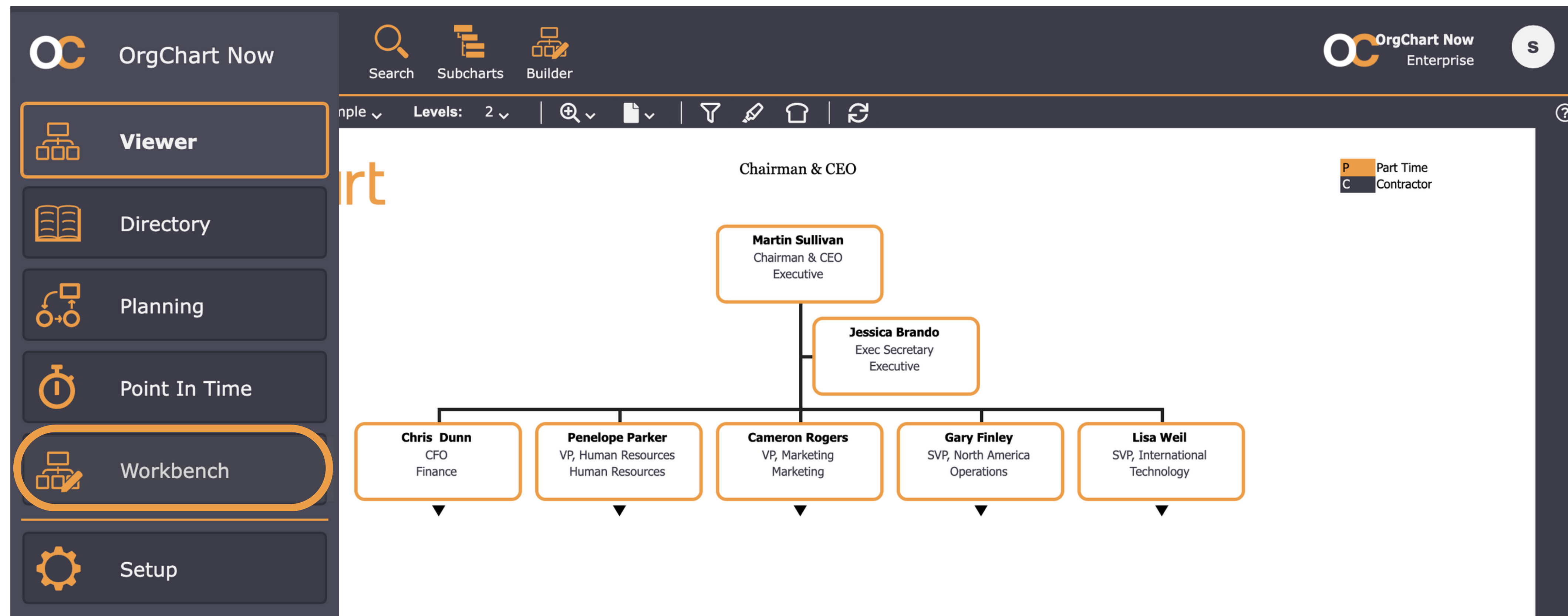
The Chart Builder allows you to take a snapshot of any subset of your master chart.

This snapshot is the starting point for a workforce plan.

The Workbench allows Administrators and Read/Write users to create and modify customized chart exports using their Master Chart data.

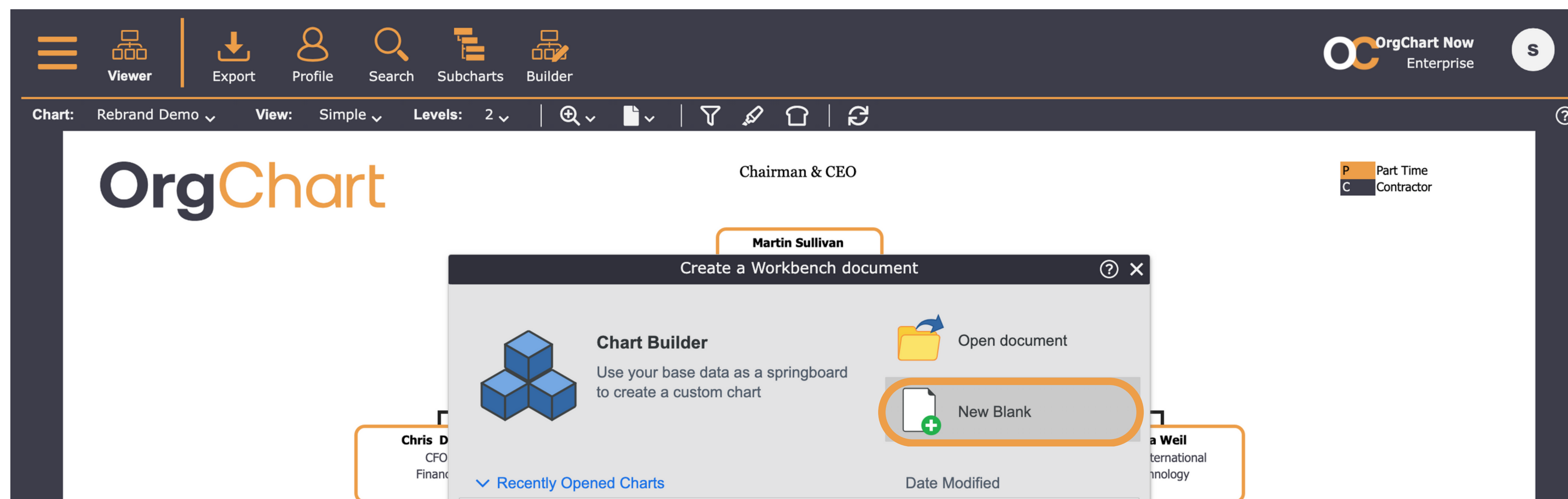
ORGCHART WORKBENCH - CREATING THE CHART

Before we begin, we will need to navigate from the OrgChart Viewer to the OrgChart Workbench.



1 Click on the  menu icon and select Workbench.

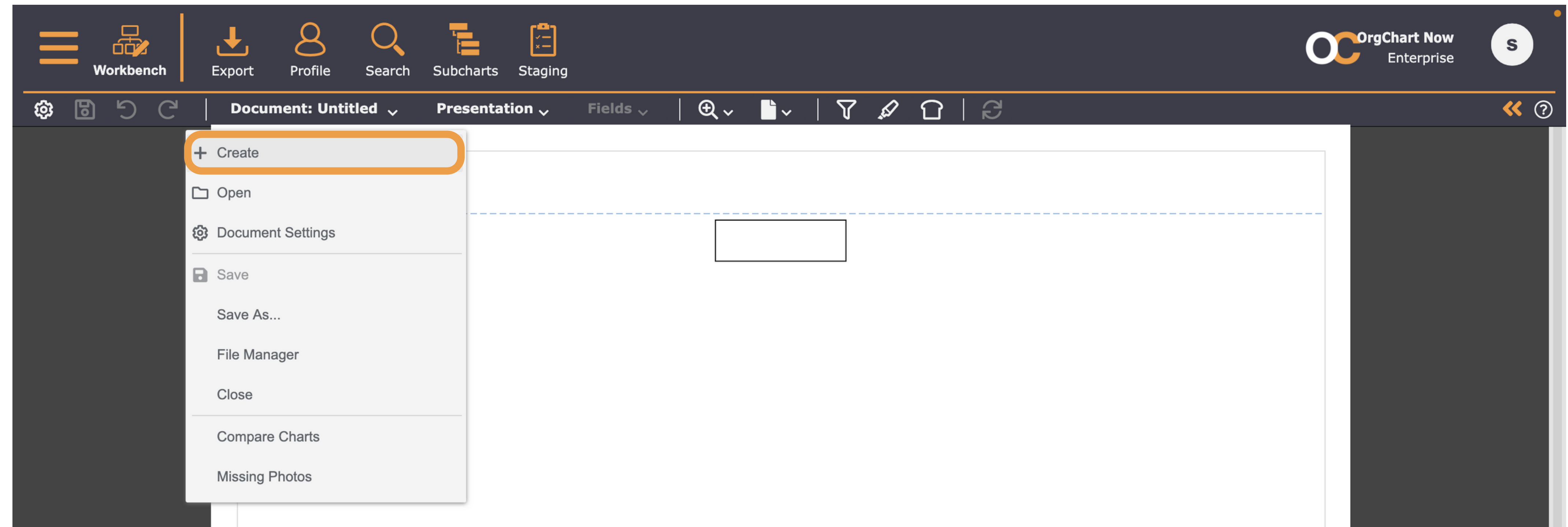
2 Click on the New Blank button in the Chart Builder pop-up panel.



ORGCHART WORKBENCH – IMPORT AN EXCEL DATA SHEET

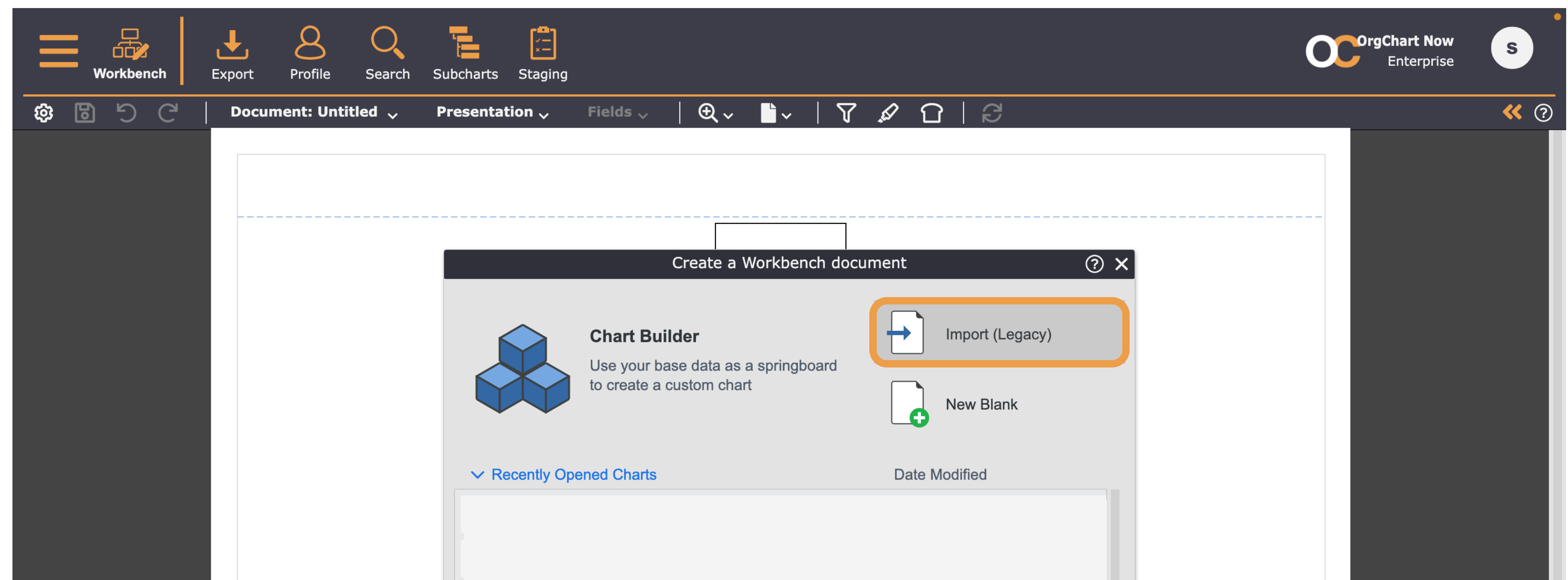
1

Click on the Document drop-down and select the Create option



2

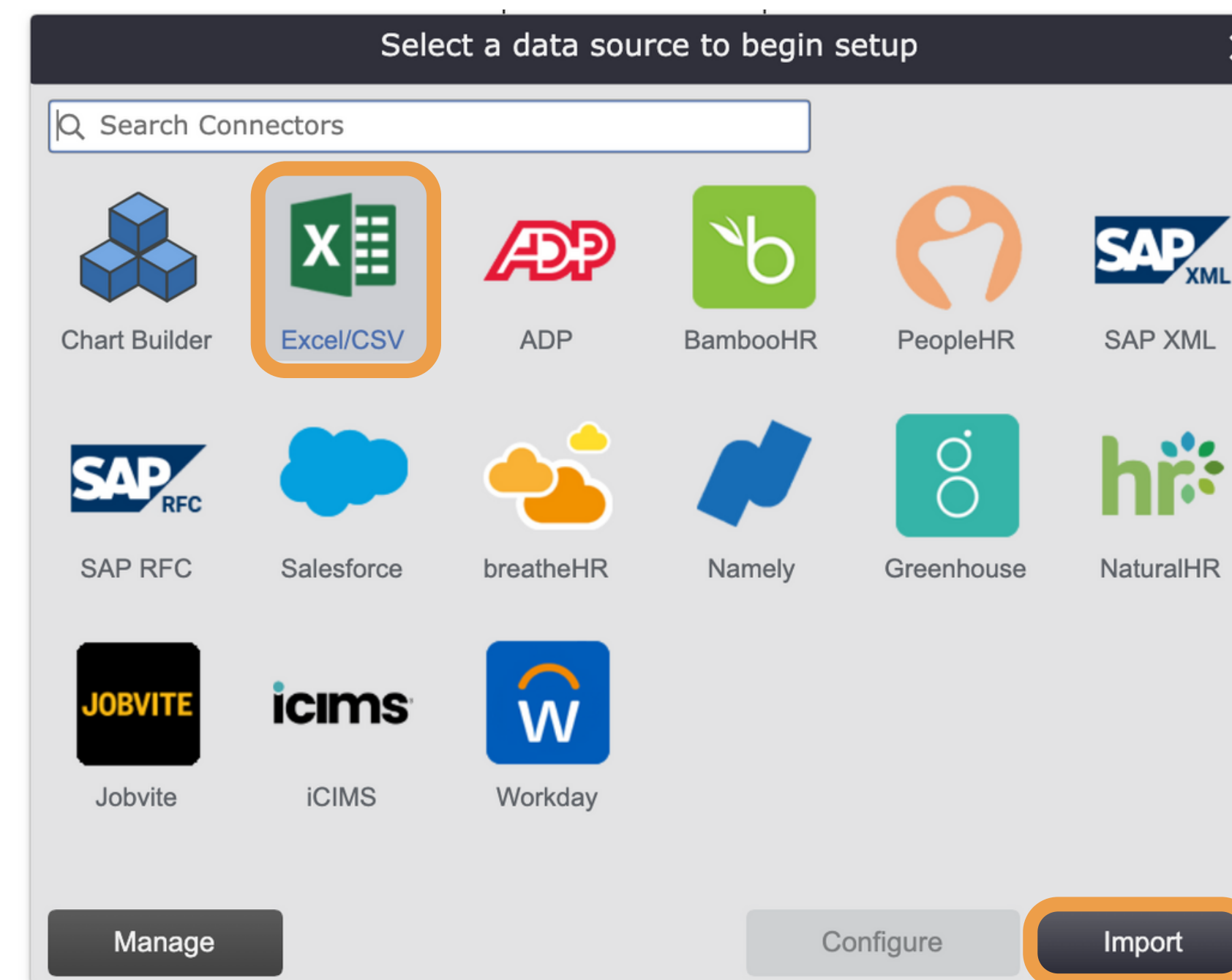
Click the Import button



ORGCHART WORKBENCH – IMPORT AN EXCEL DATA SHEET

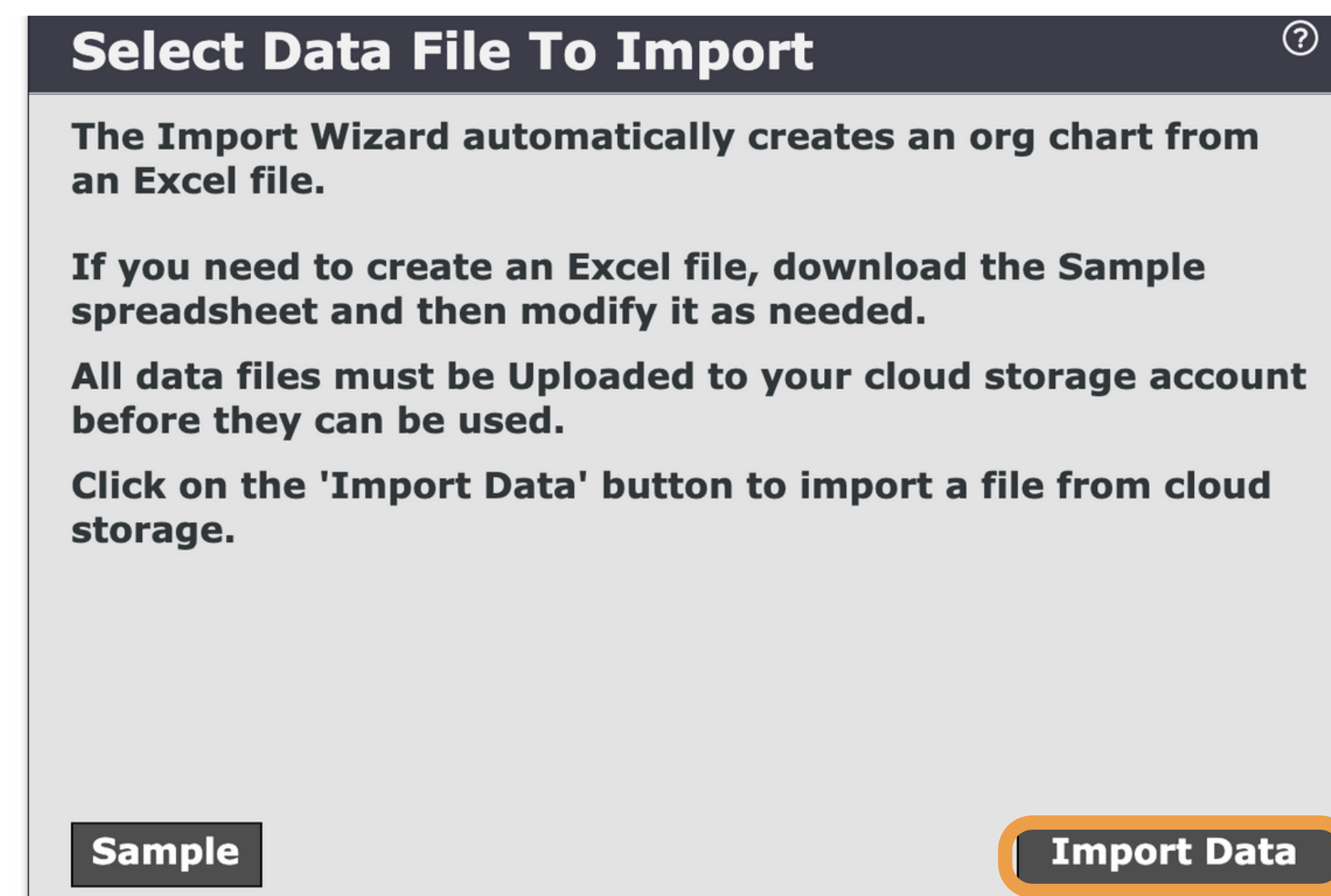
3

Click the Excel option and click on Import to begin the process



4

Click the Import Data button

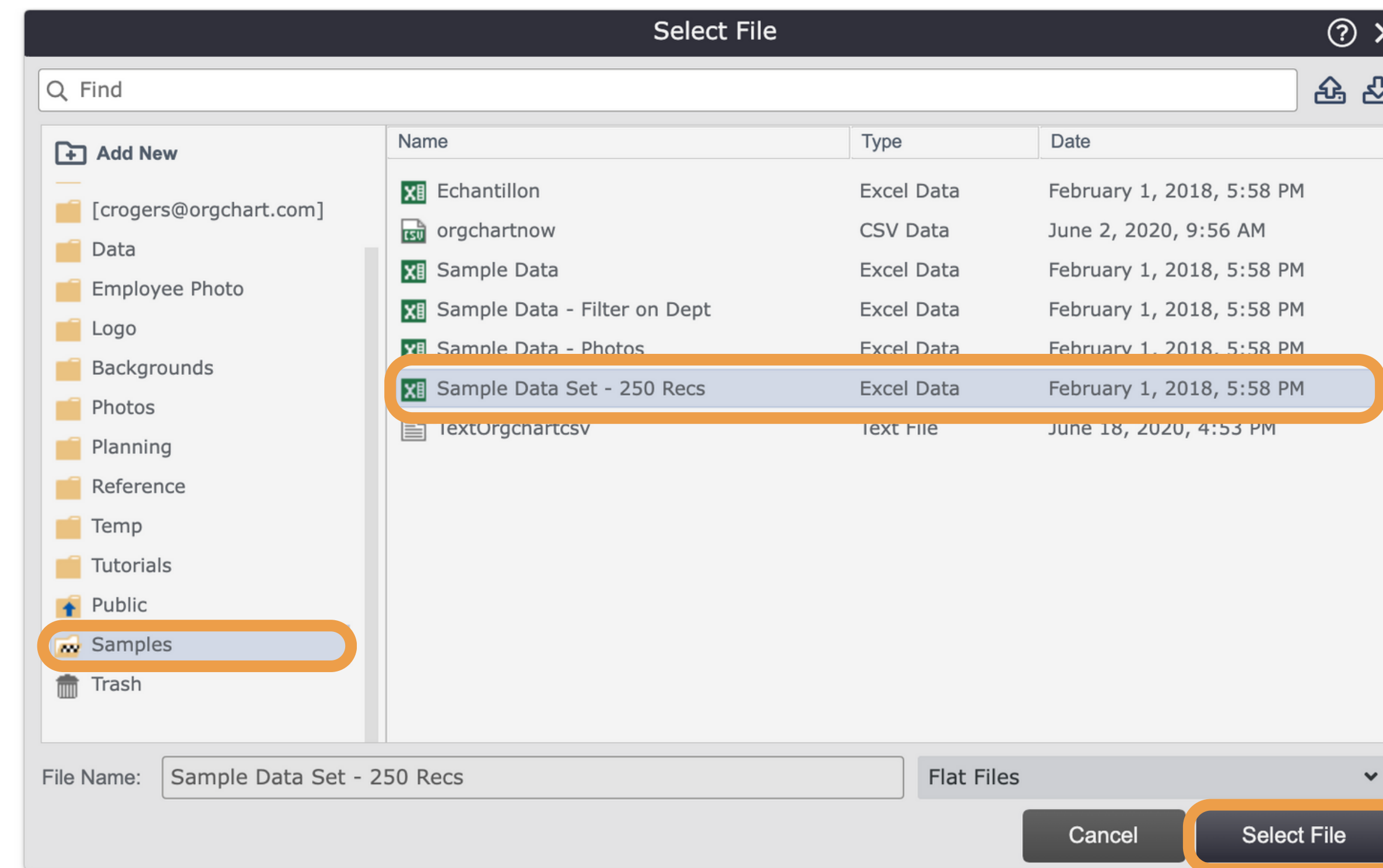


ORGCHART WORKBENCH – IMPORT AN EXCEL DATA SHEET

5

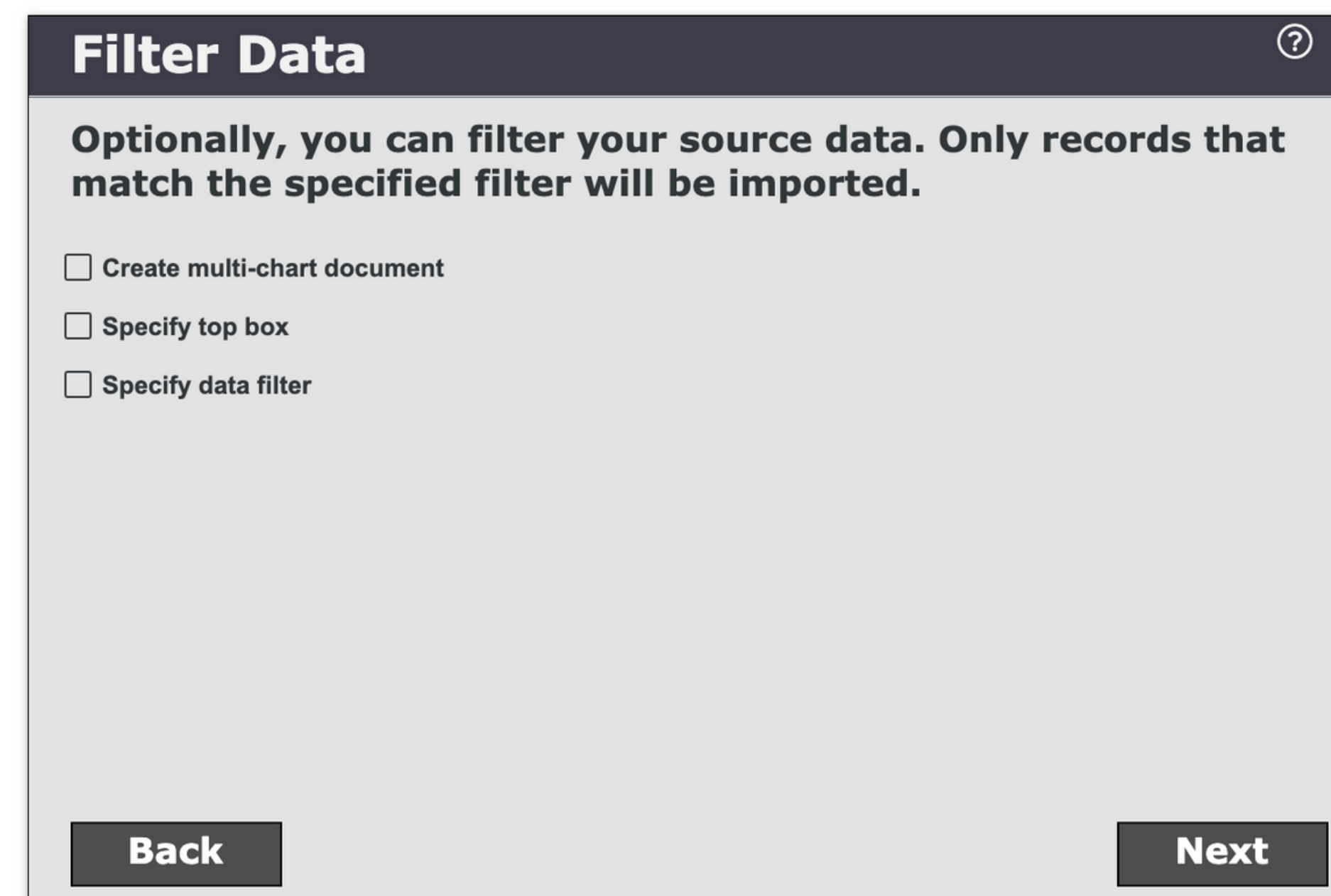
Click on the Samples folder, select the Sample Data set and click the Select File button.

Note: You would usually store your Excel/data files in the 'Data' folder.



Use filter data when you want to import only specific information, for example, one department only, or import a multi-chart document.

For this tutorial we will be skipping this step, click the Next button.



ORGCHART WORKBENCH – IMPORT AN EXCEL DATA SHEET

6

Click the Division drop-down and select Department Name.

Note: with Define Fields, you can complete the field names to match your spreadsheet's column headings.

Once the fields are mapped, click the Next button.

Define Fields [?] [X]

Please enter the required and optional fields.

Required Fields:	Optional Fields:
PersonID: PersonID	Photo: -
SupervisorID: SupervisorID	First name: -
Name: Name	Last name: -
Title: Title	Location: Location
	Division: -

Data contains hierarchy fields
 Matrix Reporting

Back **Next**

- Department Name
- Dept #
- Employee Status Classificati...
- FT/PT
- Is Contractor
- isAssistant
- Location
- Name
- PersonID
- SupervisorID
- Title

7

Click the Next button.

Note: If you have specific rules you wish to set up for assistants, this is the panel in which you would specify the criteria.

Assistant Wizard [?] [X]

Set assistant branch styles based on rules or data.

Manually set assistant branch styles
 Use 'isAssistant' field to set assistant branch styles
 Use rules to set assistant branch styles

Place first assistant on the left of manager

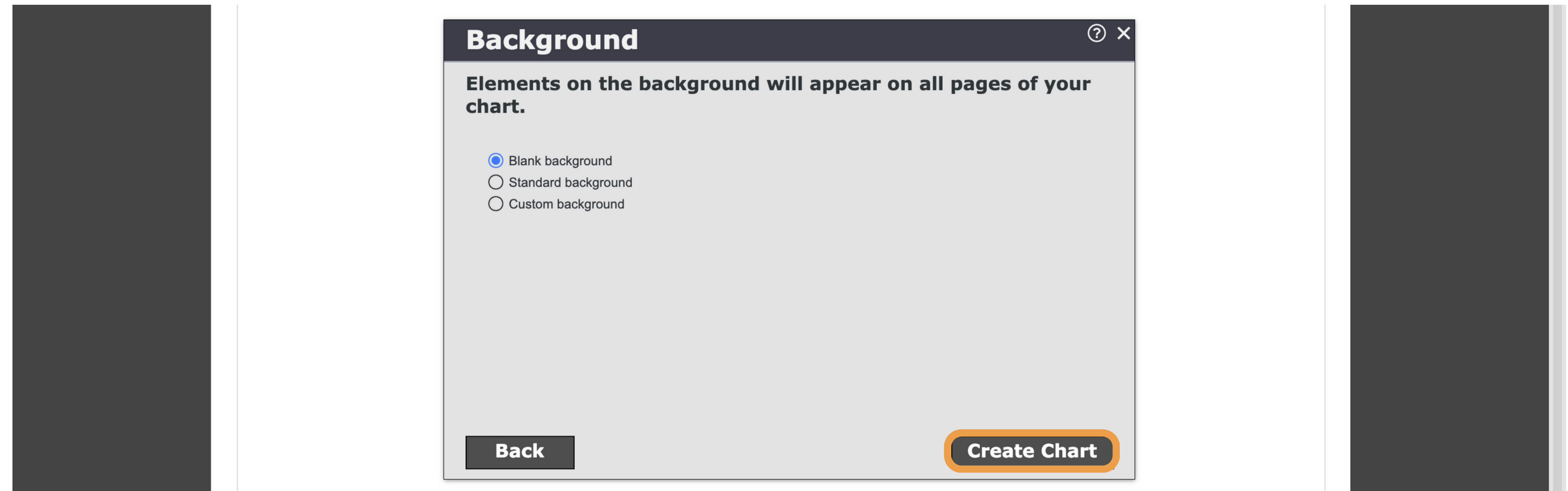
Back **Next**

ORGCHART WORKBENCH – IMPORT AN EXCEL DATA SHEET

8

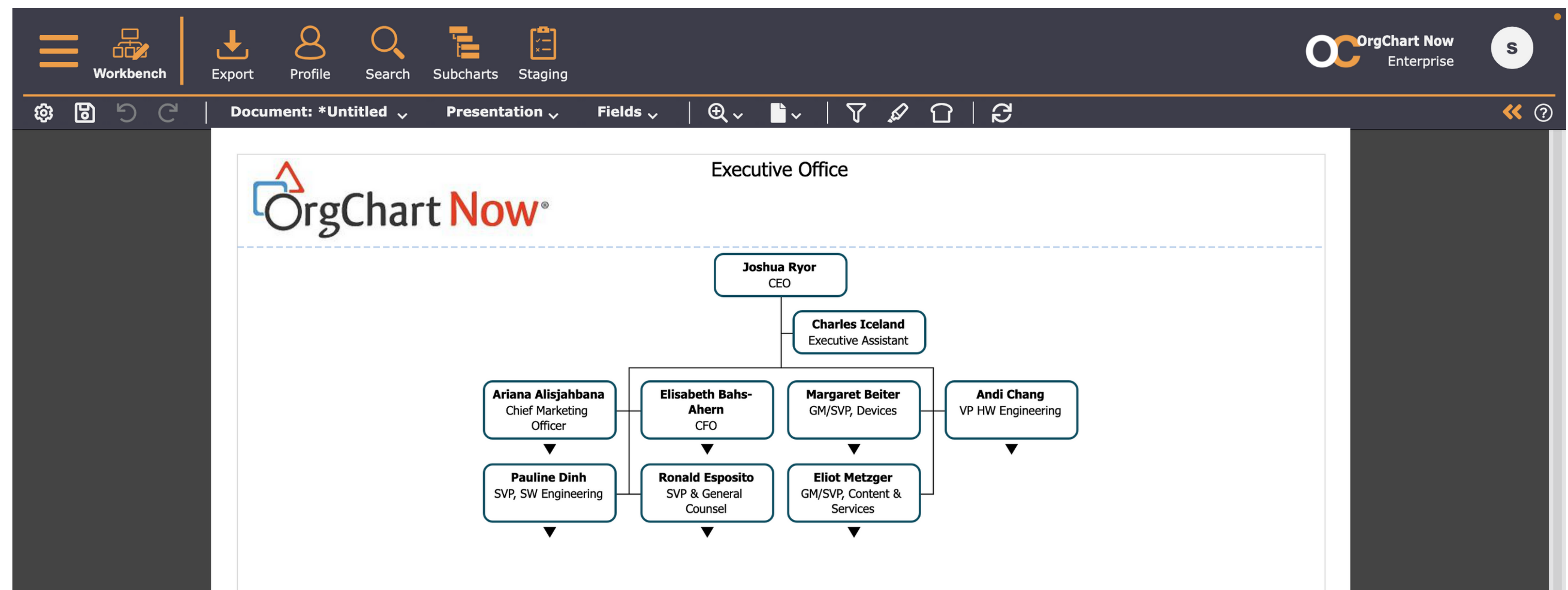
Once everything is set up and mapped to your requirements, click the Create Chart button.

This panel allows you to set custom backgrounds previously created.



Once your chart is created, you can save the chart in the Charts folder for future editing or reference.

To save your chart, click the Document drop-down and select Save As.



ORGCHART WORKBENCH - UPLOADING & DOWNLOADING FILES

Once your chart has been created, you are able to edit the base Excel file and re-upload the data. You can do this by downloading the original file and uploading the edited file.

You are also able to download the charts, backgrounds and images.

The screenshot shows the OrgChart Now Enterprise interface. The top navigation bar includes icons for Workbench, Export, Profile, Search, Subcharts, and Staging. The main area displays an organizational chart for the Executive Office, with Joshua Ryor as the CEO. A 'File Manager' menu is open on the left, and a 'File Manager' window is open in the foreground, showing a list of files for download.

File Manager Window:

Name	Type	Date
Echantillon	Excel Data	February 1, 2018, 5:58 PM
orgchartnow	CSV Data	June 2, 2020, 9:56 AM
Sample Data	Excel Data	February 1, 2018, 5:58 PM
Sample Data - Filter on Dept	Excel Data	February 1, 2018, 5:58 PM
Sample Data - Photos	Excel Data	February 1, 2018, 5:58 PM
Sample Data Set - 250 Recs	Excel Data	February 1, 2018, 5:58 PM
TextOrgchartcsv	Text File	June 18, 2020, 4:53 PM

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.

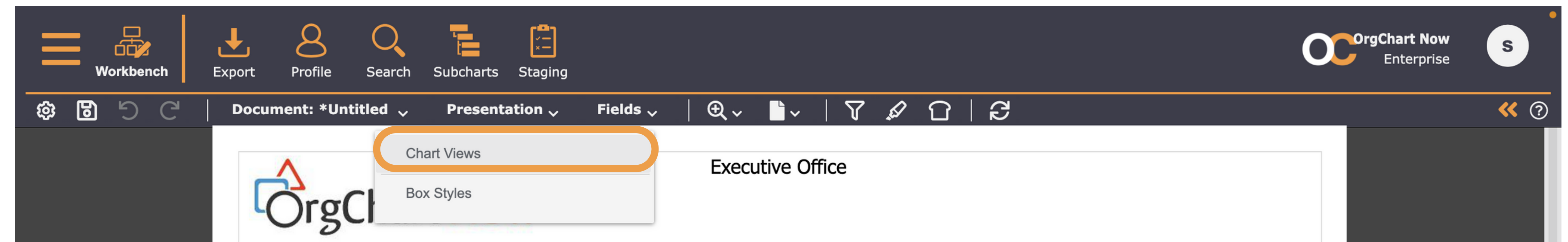
2 Once you open the File Manager, select the Folder and file you wish to download.

You will see the Upload and Download buttons on the top right.

ORGCHART WORKBENCH – APPLYING VIEWS

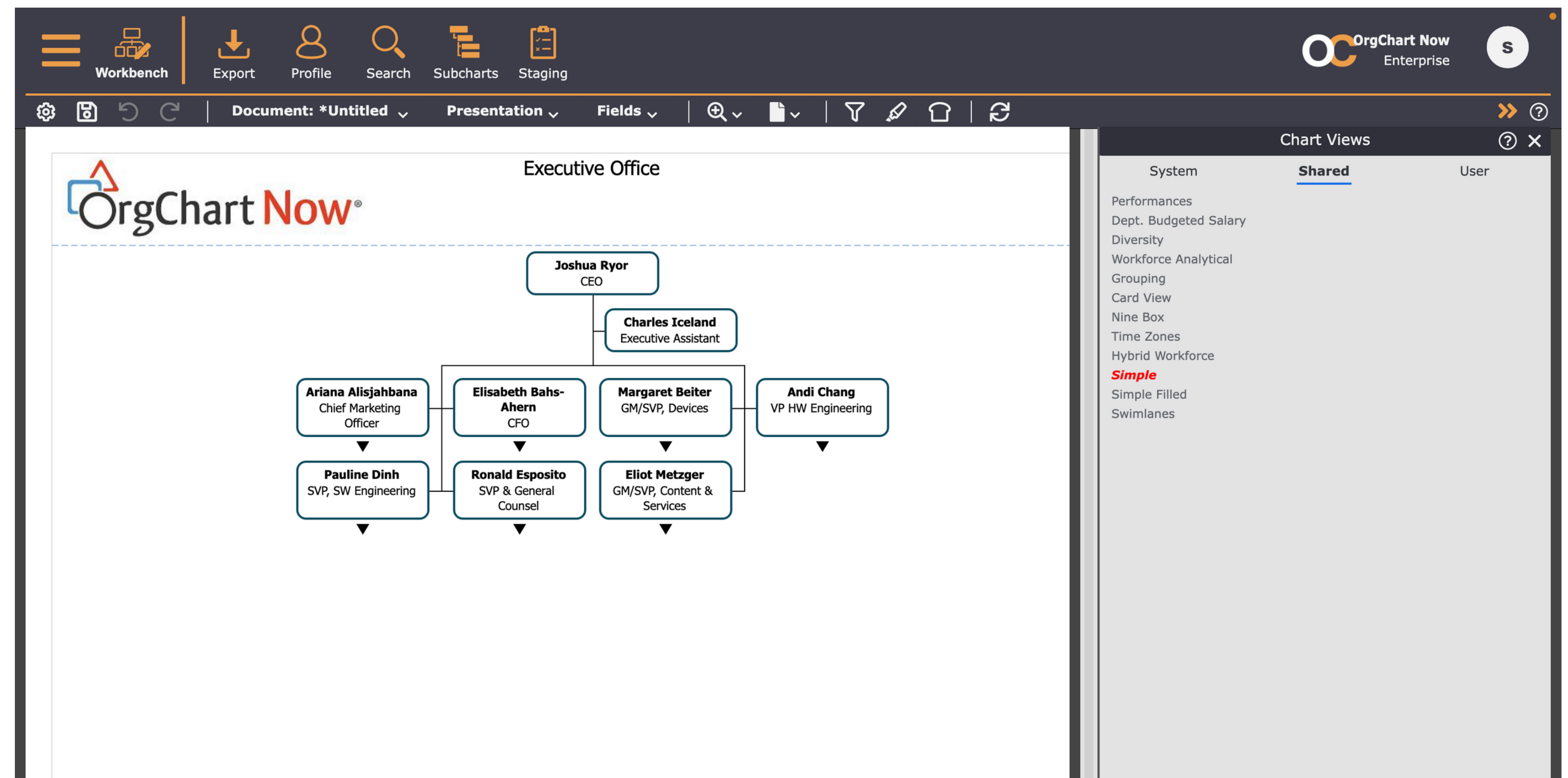
Once you have imported your file and created your chart, you can change the View at any time to match your requirements.

1 Click the Presentation drop-down and select the Chart View option.



2 A Chart Views panel will pop up on the right-side of the screen. Double-click the relevant view to apply it.

To ensure that the View is permanently applied, ensure that you save the chart.



ORGCHART WORKBENCH – APPLYING BACKGROUNDS

Once you have imported your file and created your chart, you can change the Background at any time to match your requirements.

The screenshot shows the OrgChart Now Enterprise interface. On the left, an organizational chart for the 'Executive Office' is displayed, with Joshua Ryor as CEO at the top. Reporting to him are Charles Iceland (Executive Assistant), Ariana Alisjahbana (Chief Marketing Officer), Elisabeth Bahs-Ahern (CFO), Margaret Beiter (GM/SVP, Devices), and Andi Chang (VP HW Engineering). Below these are Pauline Dinh (SVP, SW Engineering), Ronald Esposito (SVP & General Counsel), and Eliot Metzger (GM/SVP, Content & Services). On the right, the 'Chart Editor' panel is open, showing the 'Background' section with an 'Apply' button highlighted by an orange box.

1 In the Chart Editor, scroll down until you find the Background section. Click the Apply button.

The screenshot shows a 'Background Options' dialog box overlaid on the chart editor. The dialog contains the text: 'Elements on the background will appear on all pages of your chart.' There are three radio button options: 'Blank background', 'Standard background', and 'Custom background'. The 'Custom background' option is selected and highlighted with an orange circle. Below the radio buttons is a text input field and a 'Select...' button. At the bottom of the dialog are 'Cancel' and 'OK' buttons.

2 Click the Custom background radio-button, click the Select button and select your preferred background from the Backgrounds folder.

Once selected, click OK.

To ensure that the Background is permanently applied, ensure that you save the chart.

ORGCHART WORKBENCH – REFRESHING THE CHART

If you have updated your data file and wish to refresh your chart with new data, follow the steps below.

1

Click on the Gear icon to open the Document Settings for your chart.

2

In the Changes tab, click the tick-boxes for:

- Preserve user changes to pagination (subchart breaks)
- Preserve manual identification of assistants
- Preserve manual changes to branch styles

Ensuring these settings are selected will save the manual edits and changes made on your chart.

Click Save and Refresh.

3

To 'quick refresh', click on the Refresh icon on the secondary toolbar.

The screenshot shows the OrgChart Now Enterprise interface. The main window displays an organizational chart for 'Executive Office' with 'Joshua Ryor, CEO' at the top. A 'Document Settings' dialog box is open, showing the 'Changes' tab. The 'Document Changes' section lists several options with checkboxes:

- Preserve user changes to pagination (subchart breaks)
- Preserve manual changes to box presentation (box layouts)
- Preserve manual identification of assistants
- Preserve manual changes to branch styles
- Preserve box sort (overrides sort after refresh)
- Generate Diagnostic Report

The 'Selected chart view' is set to 'Basic'. At the bottom of the dialog are 'Reset', 'Refresh', 'Exit', and 'Save' buttons. In the secondary toolbar at the bottom of the interface, the 'Refresh' icon (a circular arrow) is highlighted with an orange circle.

CONCLUSION

END OF TUTORIAL 4

In this interactive tutorial, we covered some of the key features of OrgChart Workbench: Import Wizard, File Upload & Download, Applying Views, Applying Backgrounds and Refresh Settings.

In the next tutorial we will learn about creating custom Backgrounds to highlight and display key information for your specific charts.



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make informed people decisions.**

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