# Quick Guide to Online OrgCharts

## Contents

## General Navigation



i) The Customer can drill down or up the Orgchart using the ⬆ and ⬇➕ buttons ❶.

ii) The employee profile can be viewed by clicking the ⚙ button on the top left corner for each employee box ❷.

iii) The OrgChart can be modified to show 2 or more levels using the ⊞ 2 3 … icon ❸.

iv) The Job specification and expanded job information can be viewed by clicking on the Job Title as shown in ❹.
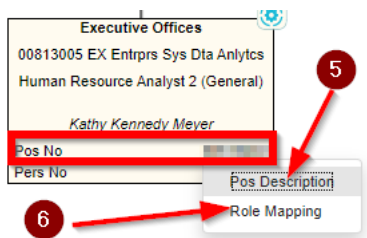


v) The Pos No field displays a list when selected. The Position Description can be viewed by clicking the Pos Description as shown in ❺.

vi) The SAP position cost distribution and role assignments can be viewed by selecting Role Mapping from the list as shown in ❻.

## Performing a Customized Search



i)      An employee Search can be performed using the Search box shown in ①. Clicking on the 🔍▾ will open a Dialog box where search can be customized as per the customer needs.

ii)      Using criteria listed at ②, the customer can limit search to the top of the chart or to everyone

iii)      The Filters at ③ will allow the user to customize search based on Groups or Position Type.

iv)      The user can add the columns to the search as needed at ④, by selecting the column from the dropdown list and clicking on the **Add** (Add) button.



v)      The customer can save the Search using the "Save" button at ⑤

vi)      The customer can export the search results to an excel file using the 📄 icon at ⑥

## Types of Views

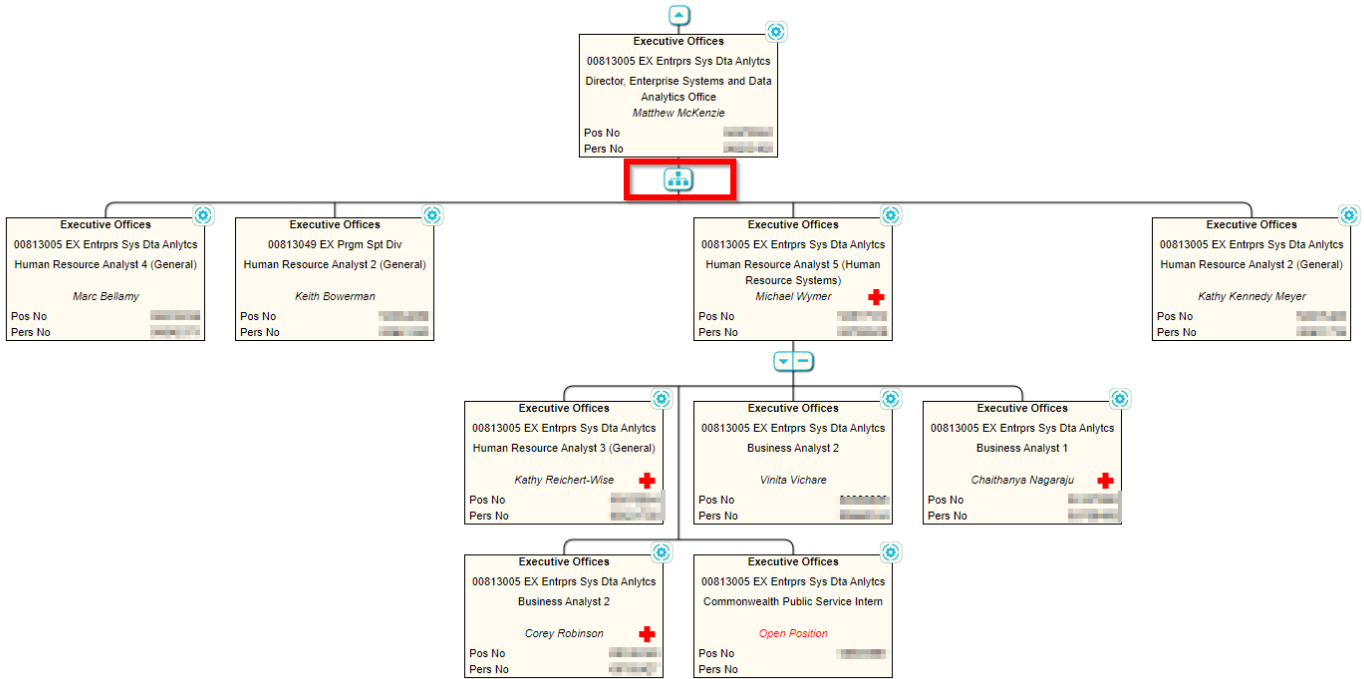### Fig-1 : Example of OrgChart view drilled down to level 3



### Fig-2 : Example of Direct Reports view
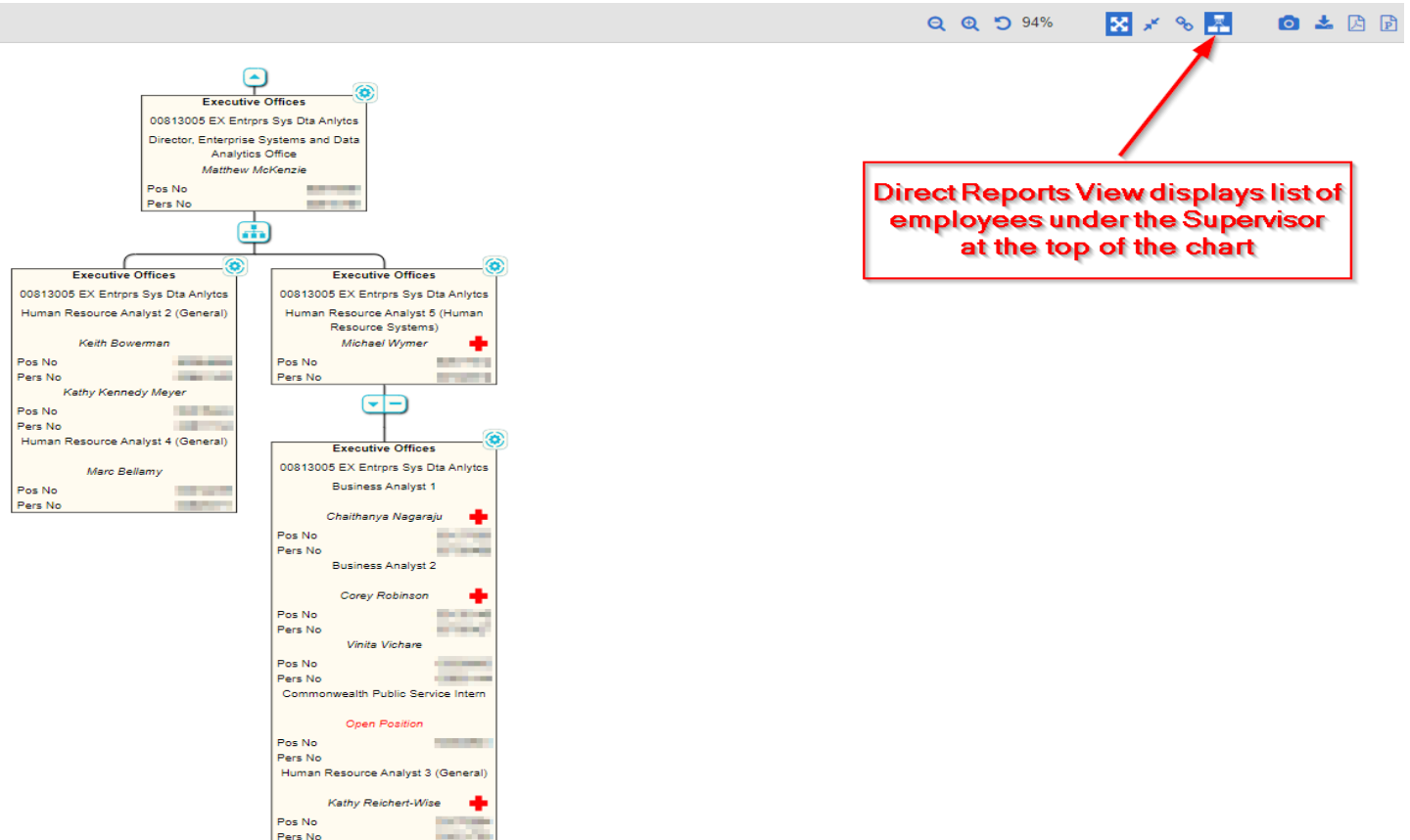


Direct Reports View displays list of employees under the Supervisor at the top of the chart
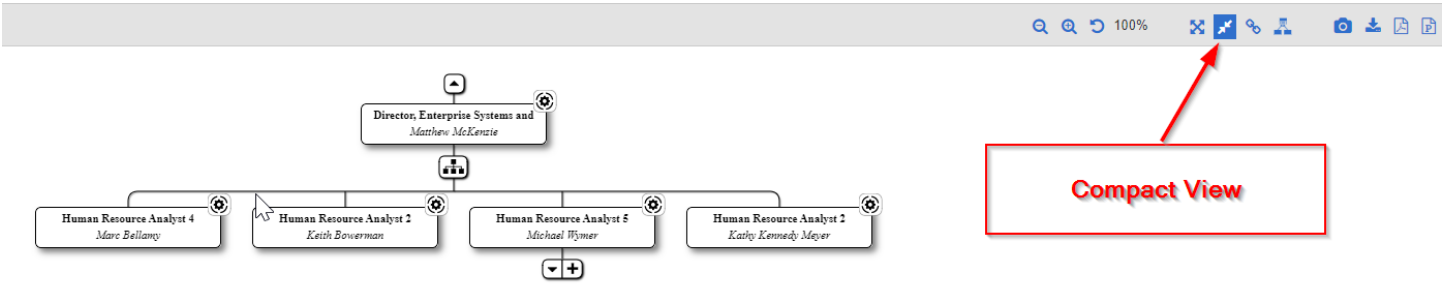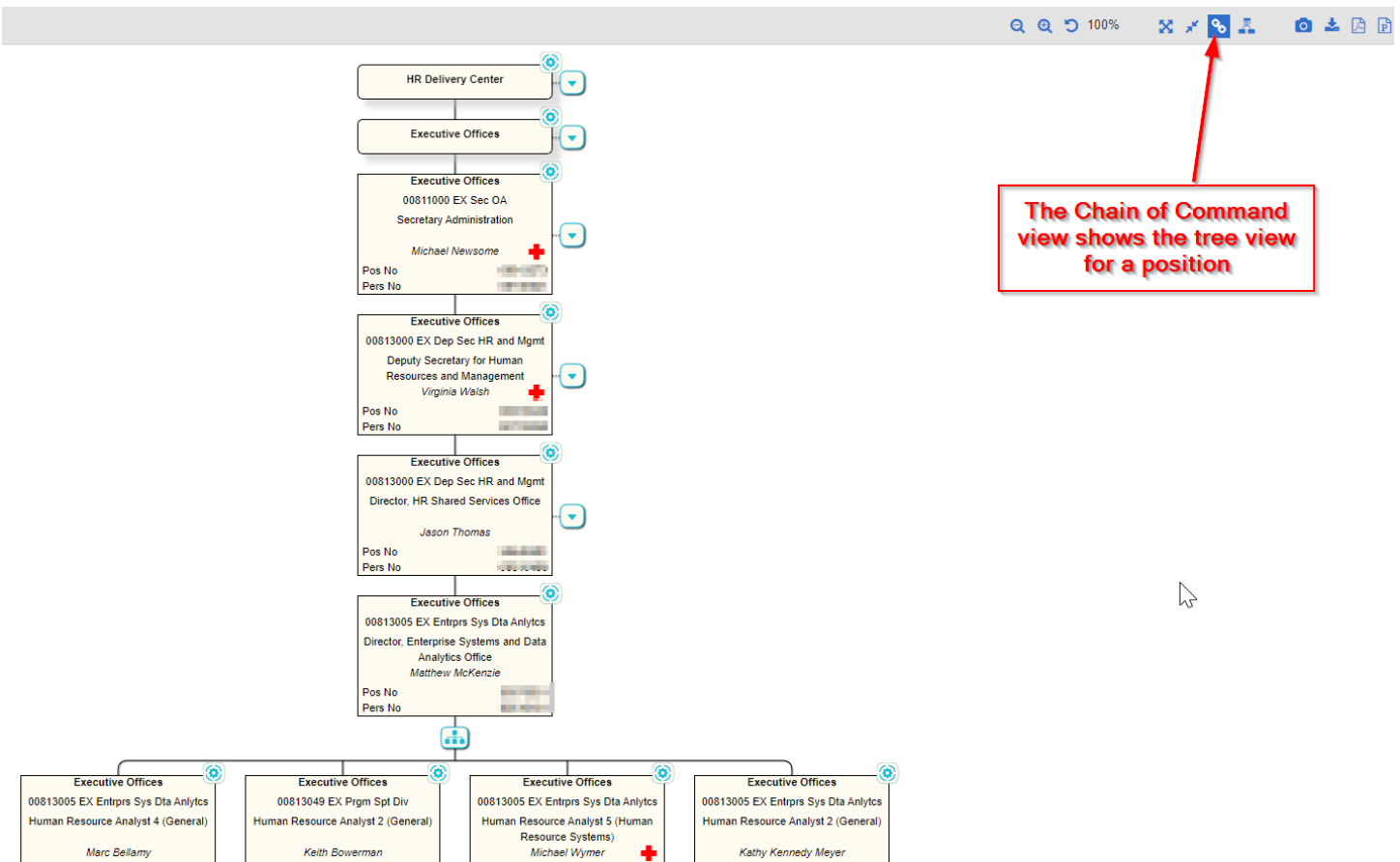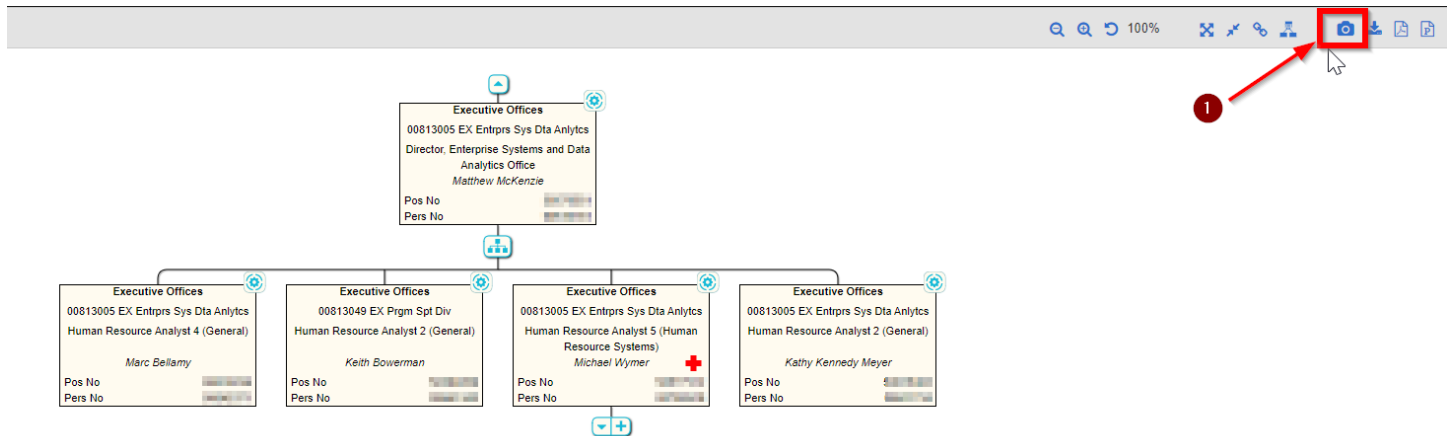
## Fig-3: Example of Compact View



## Fig-4: Example of Chain of Command view

## Capture the view (Take a snapshot of the view)
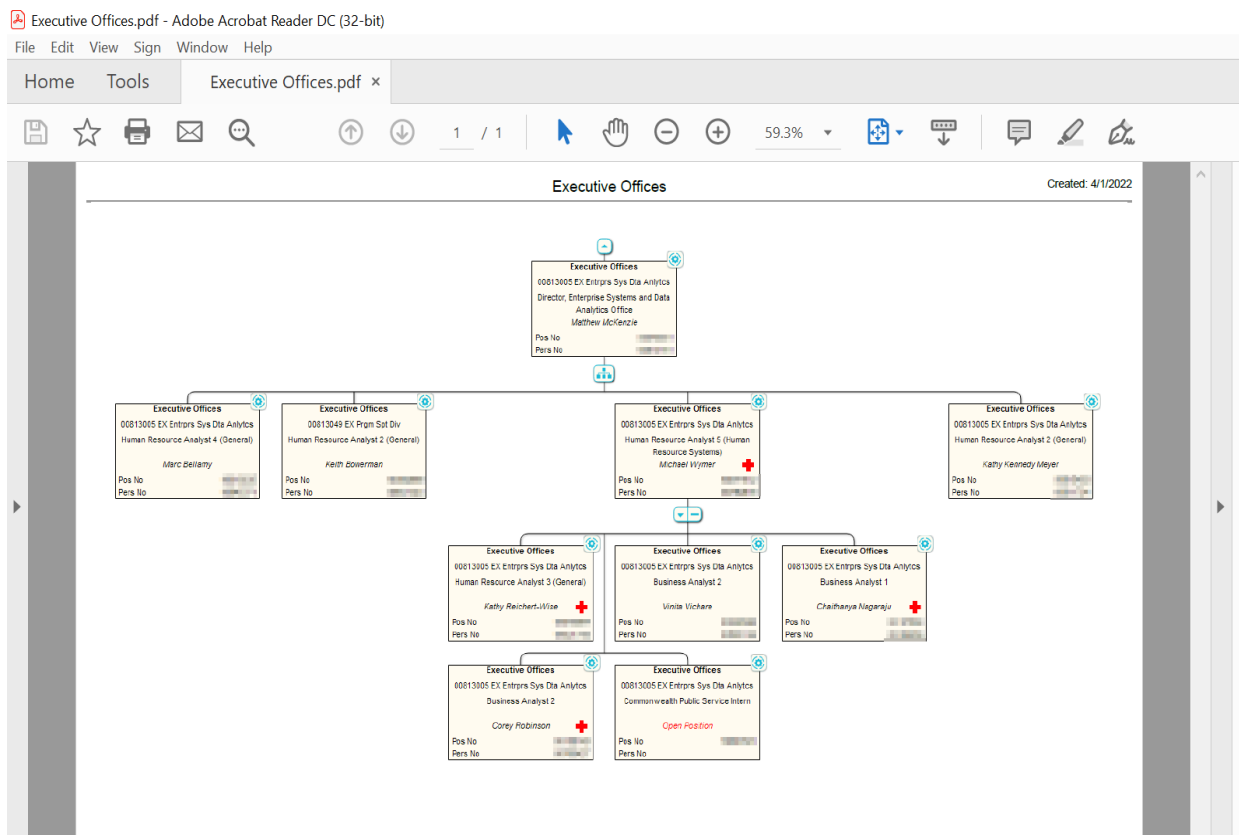


i)      Choose the type of view based on user needs.

ii)      Click on the 📷 icon on the top left-hand corner of the page as shown in ❶.

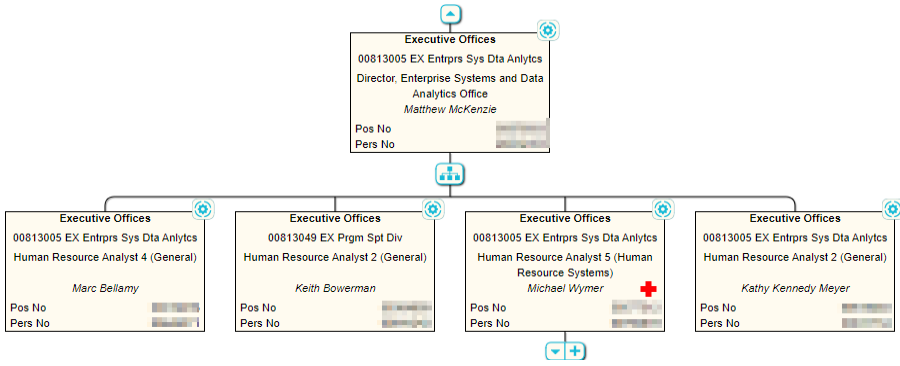iii)      A dialog box will open as shown below. Enter the Title and click on "Export to PDF" button.



iv)      The downloaded PDF is as shown below:

# Exporting OrgChart View



Export view to PDF

## Export to PDF

From Matthew McKenzie

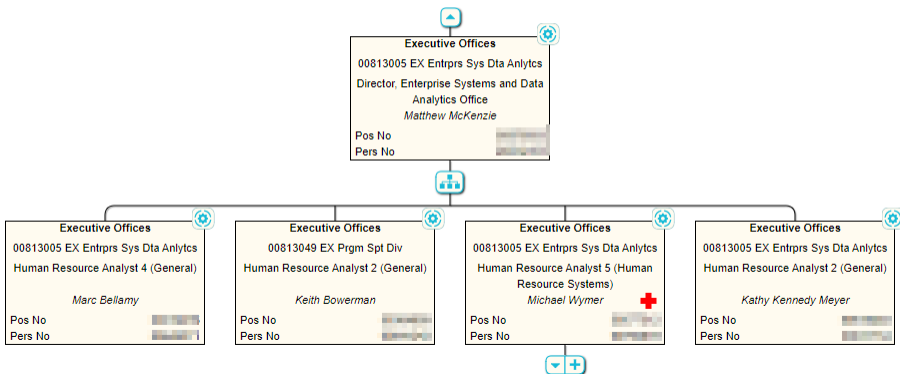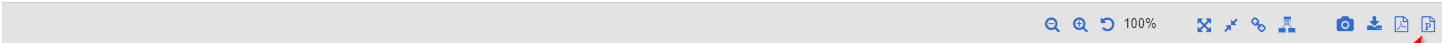| | |
|---|---|
| Levels to show | 2 |
| Include index | ☐ |
| Show chart background | ☑ |
| Include legend | ☑ |
| Page size | Ledger |
| Orientation | Landscape |
| Scaling | 100% |

Click OK to export

OK    Cancel



Export view to PowerPoint

## Export to PowerPoint

From Matthew McKenzie

| | |
|---|---|
| Levels to show | 2 |
| Show chart background | ☑ |
| Include legend | ☑ |
| Page size | Ledger |
| Scaling | 100% |

Click OK to export

OK    Cancel