User Guide

Organization Chart (Admin)
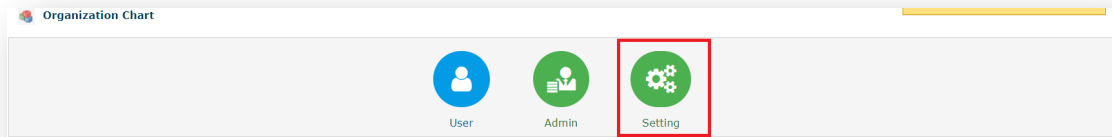
Contents

Introduction

A) Purpose

To allow user to know the functionality of the organization chart.

B) Features

- To enable User export organization chart into picture format.
- To enable Administrator to customize Organization Chart View of employee.

To Change Organization Chart View

1. Open Organization Chart Setting

2. Click on the icon button of Setting to open Organization Chart Setting.
3. Select the desired option for Organization Chart View.
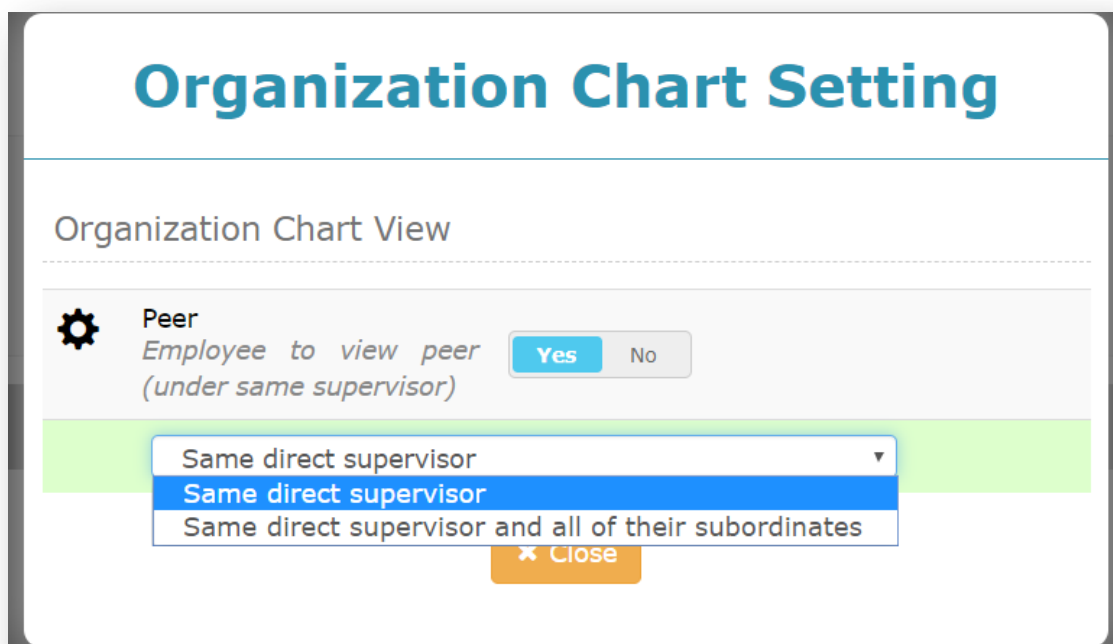
INFO
Administrator can control the Organization Chart View for all employees.

Administrator can choose one of the following options:
a)   To allow employees to view peer (same direct supervisor), or

b)   To allow employees to view peer (same direct supervisor and all their subordinates), or

c)   Do not allow the employees to view peer

4. After the selection, the following screen will show:

1. Icon info will display the original option.
2. Save button to save changes.
3. Close button to close the pop-up window.

Button Functionality of Organization Chart (Admin)

The Organization Chart will show the highest level employee or employee without supervisor as Root Node (Company Node).
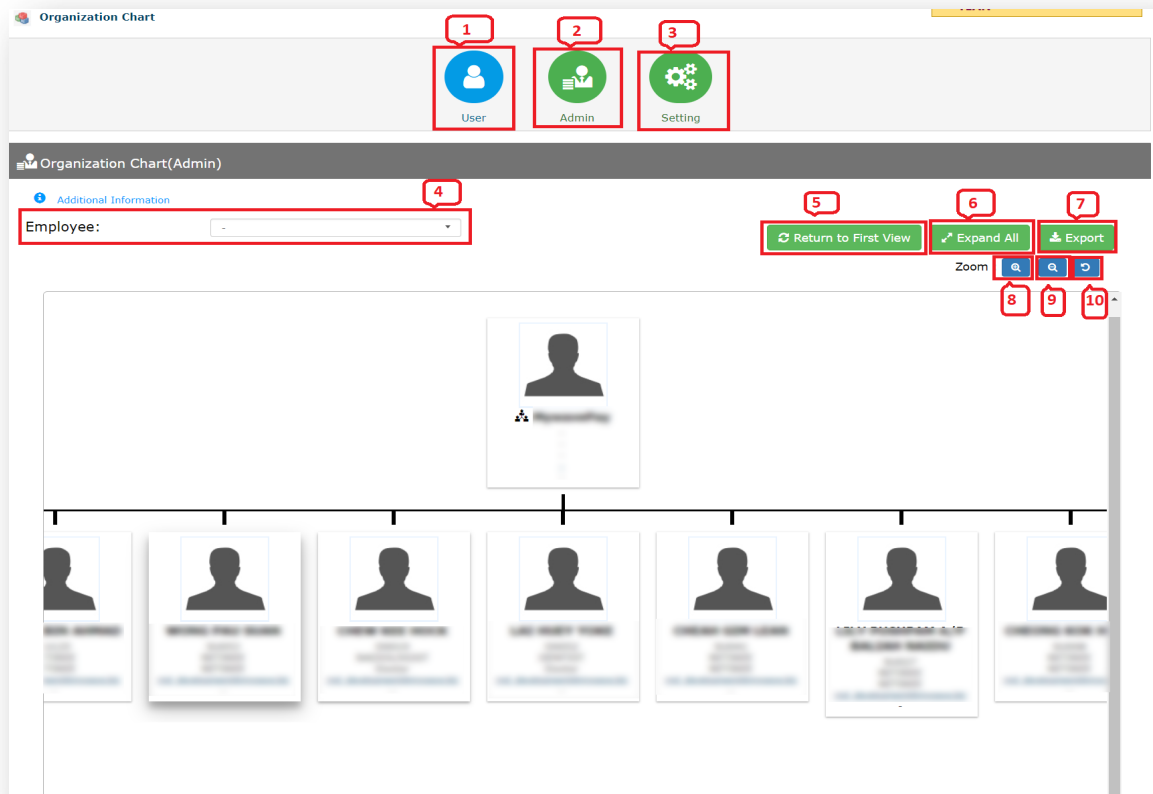

There are a few buttons in the Organization Chart (Admin):

1 User button: to navigate Organization Chart with User Mode

2 Admin button: to navigate Organization Chart with Admin Mode

3 Setting button: Organization Chart Setting. Please refer to the Organization Chart Setting.

4 Employee Drop Down Menu: to allow Administrator to search employee

5 Return to First View button: to return to first page view

6 Expand All button: to expand or collapse node in Organization Chart

7 Export button: to export current viewing Organization Chart into PNG format

8 Zoom-in button: to allow Administrator to enlarge the size of the Organization Chart

9 Zoom-out button: to allow Administrator to minimize the size of the Organization Chart

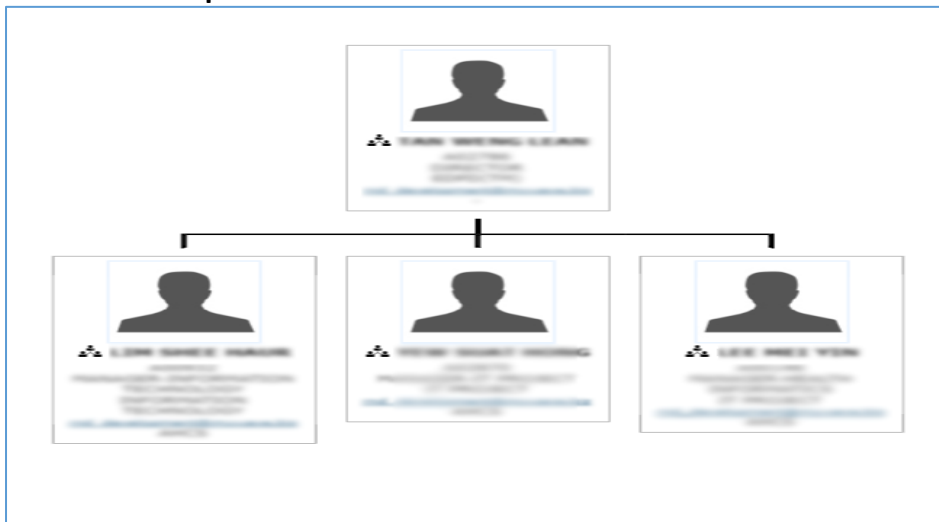10 Reset button: to allow Administrator to reset the size of the Organization Chart.

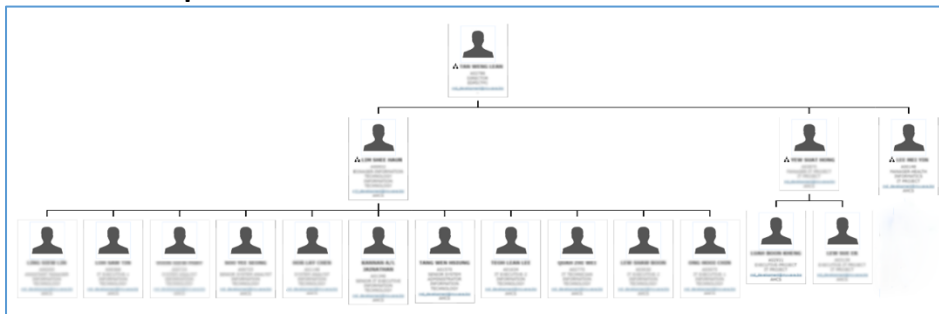# To Collapse or to Expand Node in Organization Chart

A) To Expand All

Click on Expand All button, the organization chart will expand.
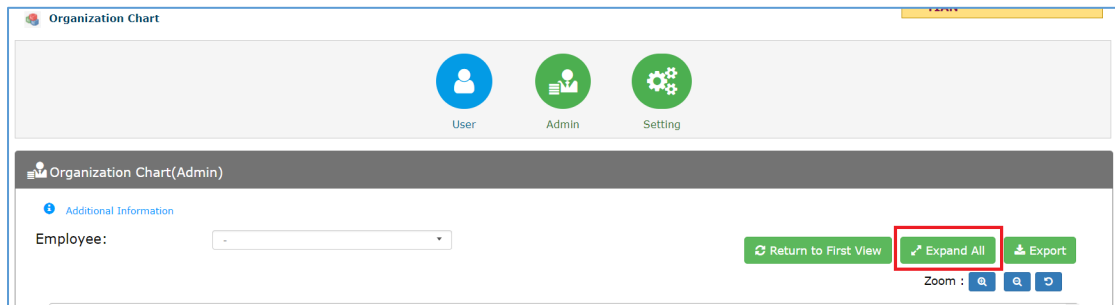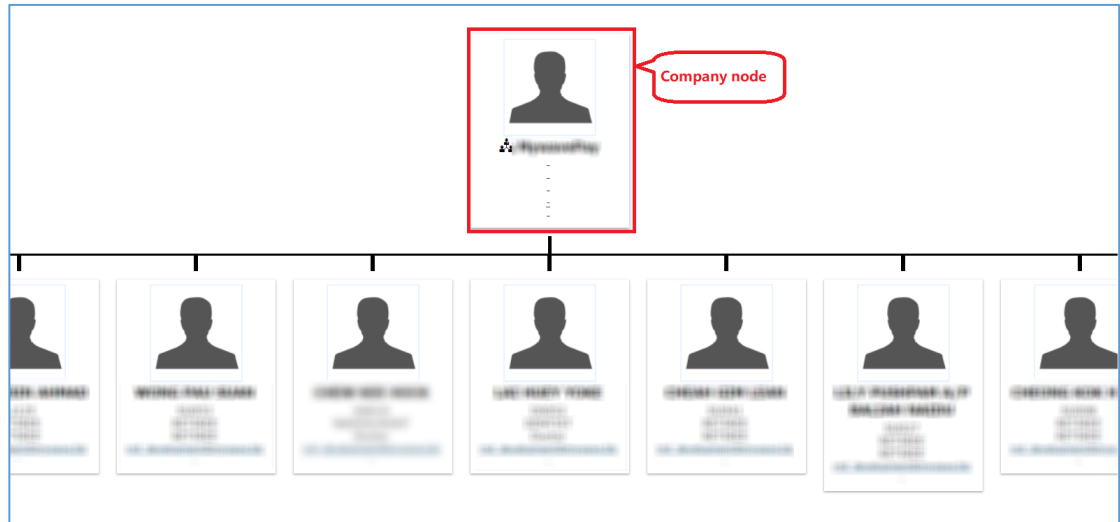

View Before Expansion

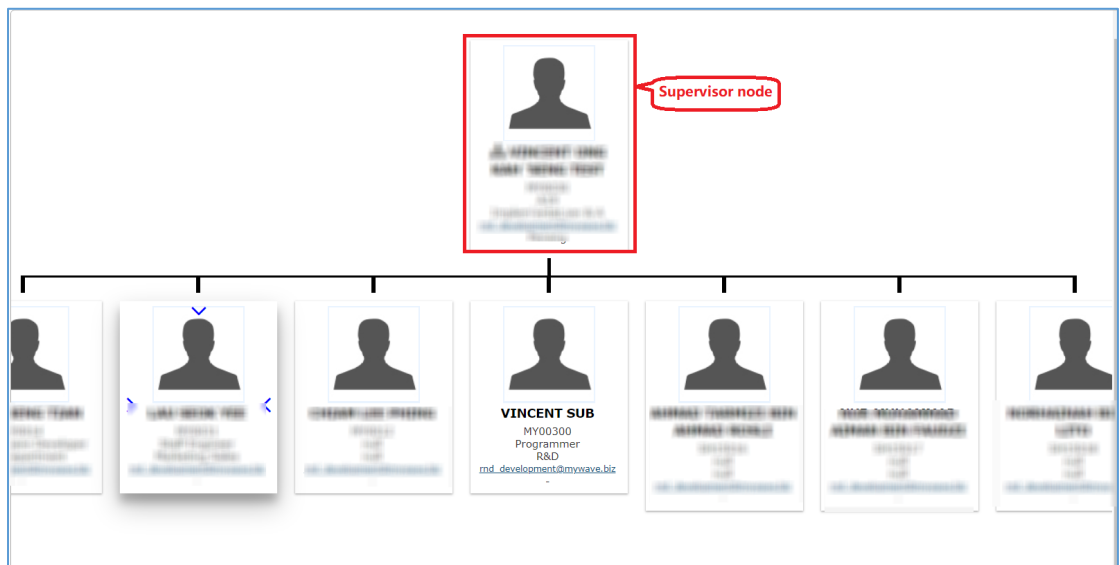**View After Expansion**

B) To Collapse All

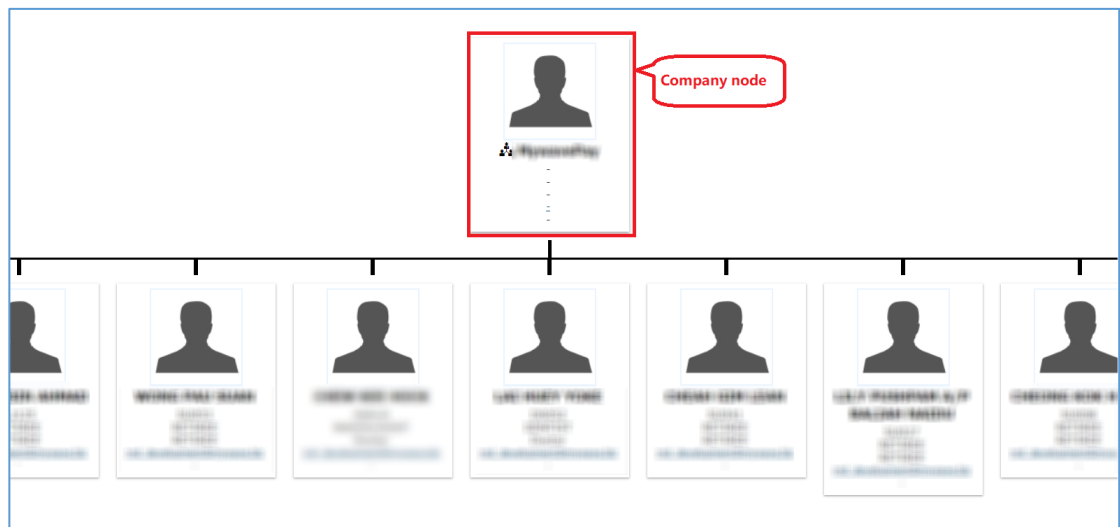Click on Return to First View button, the organization chart will collapse to original view.

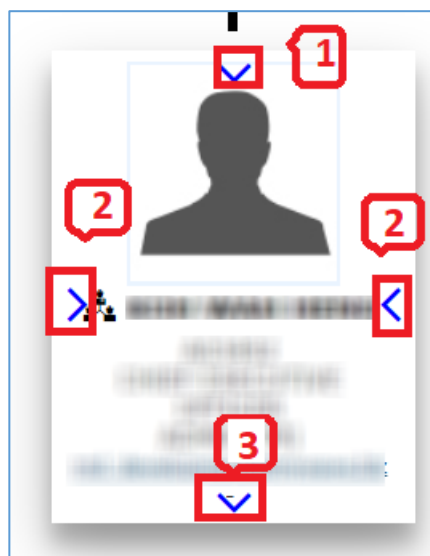**Original View**

View Before Collapse

View after Clicking on "Return to First View" button
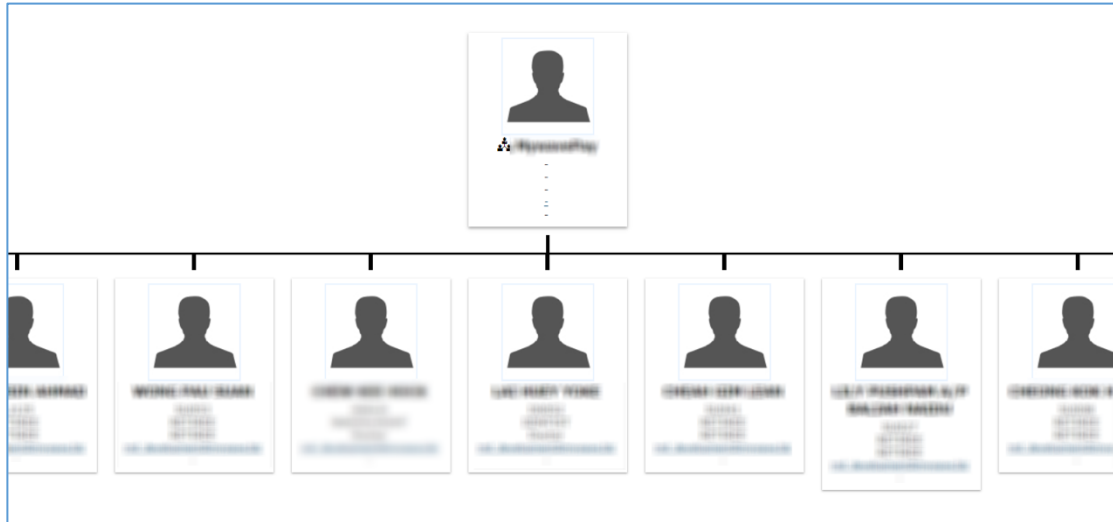

C) Arrow Info

The arrow icons on the node can be triggered by mousing over the node.

1. Top Edge
   To expand or collapse supervisor node.
2. Horizontal Edge, Left Edge and Right Edge
   To expand or collapse sibling nodes.
3. Bottom Edge
   To expand or collapse subordinates nodes.

To Zoom In and to Zoom Out of Organization Chart

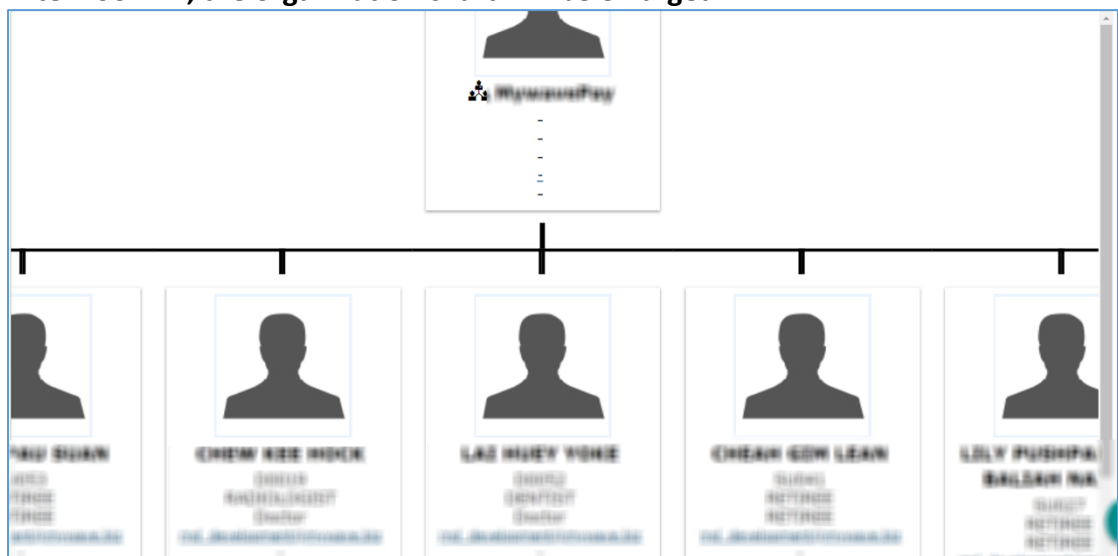**View Before Any Action**

A) To Zoom In

User needs to click the most left button to perform zoom in action.

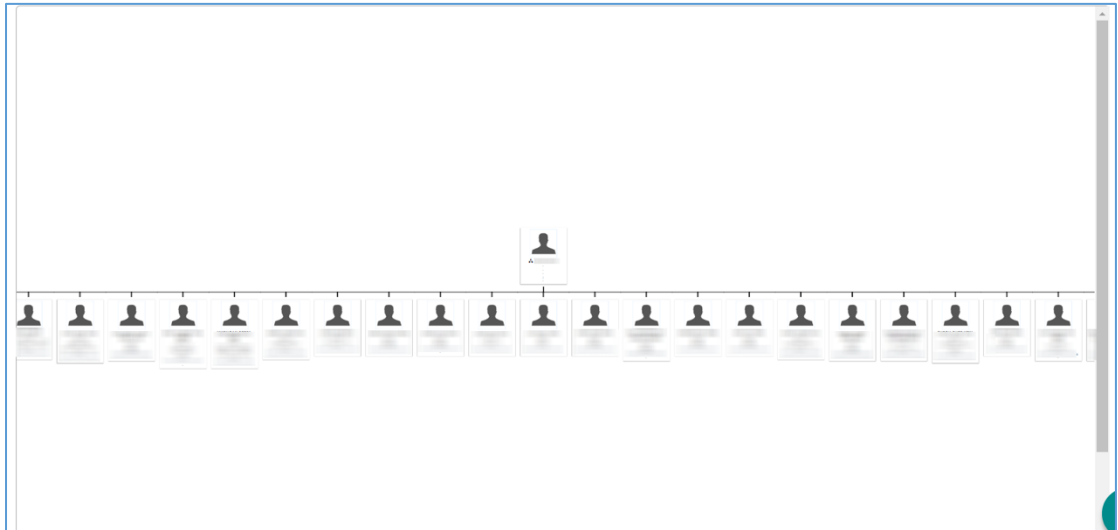**After zoom in, the organization chart will be enlarged**

The maximum scale for zoom-in is 200%.

B) To Zoom Out

User needs to click the middle button to perform zoom out action.

After zoom out the organization chart becomes smaller.

The minimum scale of zoom out is 10%.

C) To Reset Zooming

User can reset the organization chart by clicking on the most right button.

The organization chart will reset scale to 100%.

To Load Organization Chart of Specific Employee

A) By Drop-Down Menu

User can select the employee by using the drop-down menu.

After selecting the employee, the Organization Chart will reload based on the selected employee.

User can also use the search box to search such as employee name and employee number to select the employee.

After selecting the employee, the Organization Chart will reload and place the selected employee as the root node.

If the selected employee does not have subordinates, it will show the selected employee only.
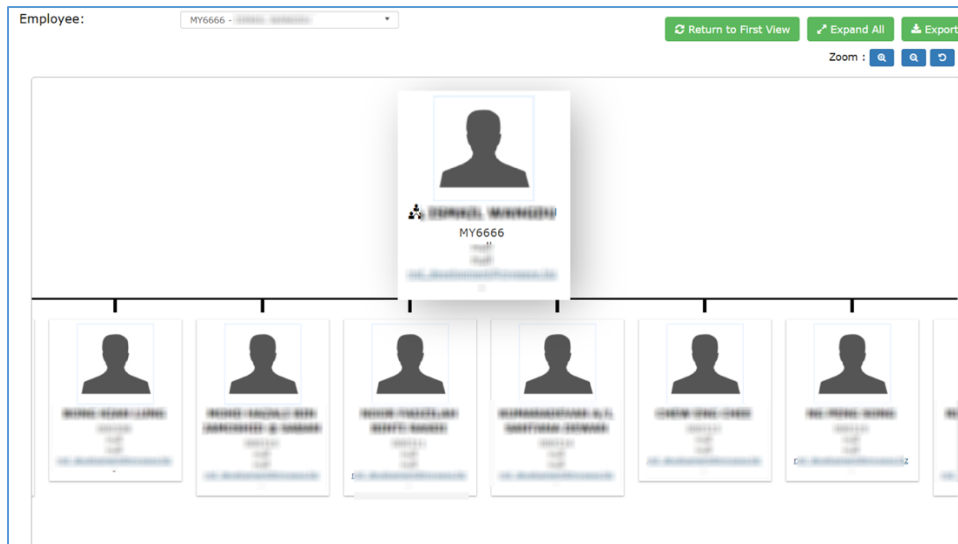
If the selected employee has subordinates, it will show the selected employee as the root node, and all his/her direct subordinates.

The administrator can select any of the subordinates to expand further, if avalaible.

The selected employee/node will be enlarged.


B) By Search Icon in the Node

User can select and zoom in to the specific employee organization chart by using the search icon shown in the node.

To trigger the search icon in the node, user needs to click on one of the nodes in the organization chart. Then user can click on the search icon and search the employee to load the chart.
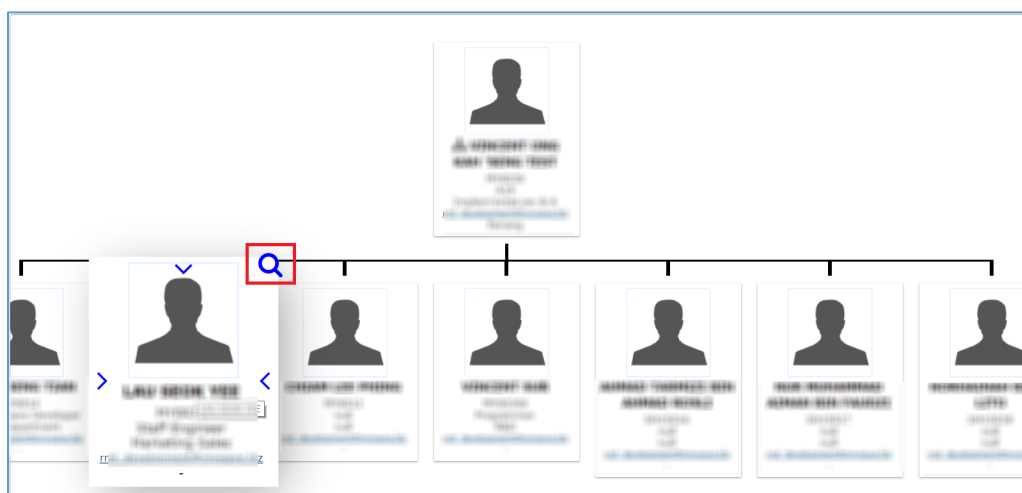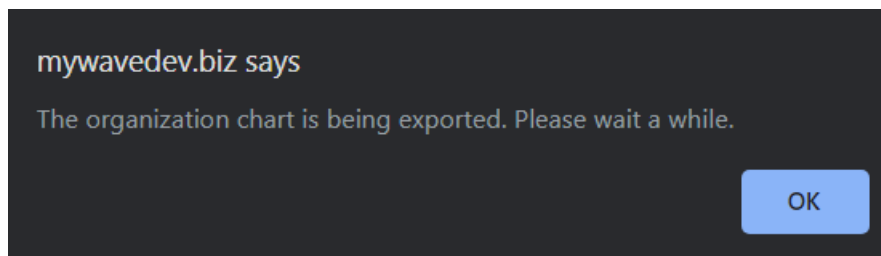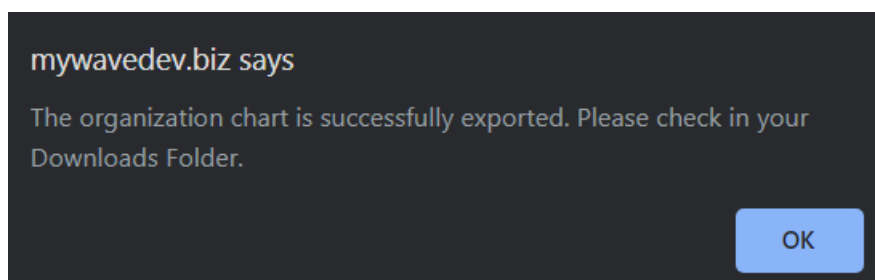
To Export Organization Chart

1. Click on the Export button.
   The current status of the organization chart will be captured.
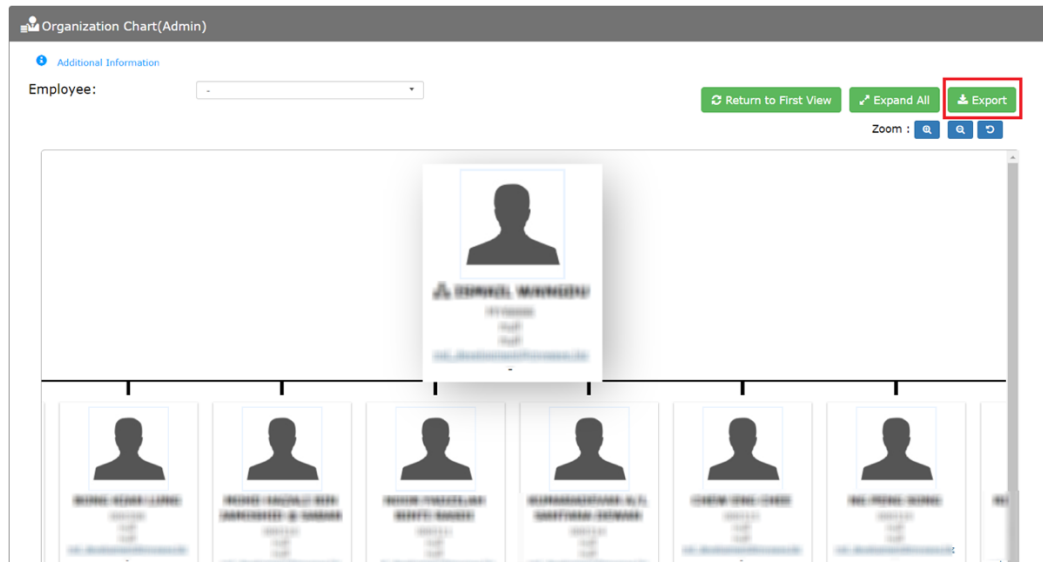
2. There will be a popup window to alert that "The organization chart is being exported. Please wait a while."

3. After the file is successfully exported, there will be a popup window to alert that "The organization chart is successfully exported. Please check in your Downloads Folder."

4.   The exported file will be in PNG format.
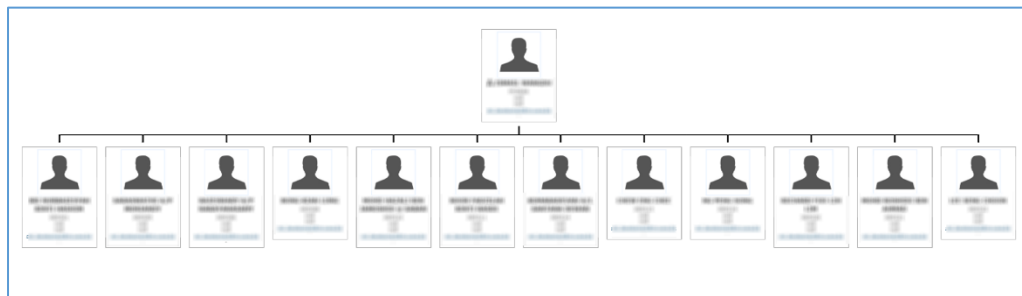
5.   If the file is too large, there will be a popup window to request the user to collapse the organization chart and try to export again.