

OrgChart Now Data Feed Guidelines

OfficeWork Software LLC

Version 1.0.2
October 28, 2015

OrgChart Now – Data Feed Guidelines

Introduction

OrgChart Now contains built in data connectors that allow you to query data directly from an HR System, flat file or database. This document provides details on how to create a flat file that can be imported into OrgChart Now.

OrgChart Now supports both Excel spreadsheets and CSV files.

>> Data Format

Required fields:

- PersonID – Unique identifier for each person or position (typically an employee number or ID)
- SupervisorID – Unique identifier for each person’s (or position’s) supervisor
- Name – Employee name
- Title – Employee title

Recommended fields:

- IsAssistant – 0 or 1 (1 indicates the person is an assistant)
- Department – A person’s department (e.g. Engineering or Marketing)
- Photo – A reference or URL to an employee photo (e.g. a jpeg file)

You can include an unlimited number of additional fields to your data file (for example, location, email address or mobile phone).

Example Data:

PersonID	SupervisorID	Name	Title	isAssistant	Department	Photo
1		Steve Smith	CEO	0	Executive	Smith1.jpg
2	1	Sandra Chen	Vice President	0	Marketing	Chen2.jpg
3	1	George Lopez	Vice President	0	Engineering	Lopez3.jpg
4	2	Arnold Osborne	Exec. Assistant	1	Marketing	Osborne4.jpg

In the example above, Sandra Chen and George Lopez report to Steve Smith and Arnold Osborne reports to Sandra Chen.

Employee Photos

If you import an Excel spreadsheet or CSV file, you can include references to employee photos (employee photos are automatically handled by Data Connectors).

1. Employee photos can either be referenced via a URL or by referencing a file uploaded to OrgChart Now. Valid formats include:

Photo	Notes
45677.jpg	Photo jpeg must be located in 'Photos' folder.
MyPhotos:45667.jpg	The folder 'MyPhotos' will be searched for the referenced photo.
http://youcompany.com/photos/45666.jpg	The URL will be resolved to a photo.

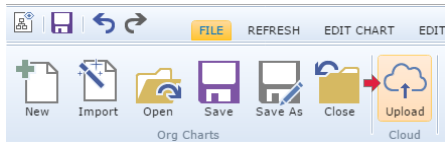
2. JPEG is the recommended format for photos.
3. Photos should not be too big. Recommended sizes are 72X72 or 150X150, 100X80, 80X100, 200X160 and 160X200.

OrgChart Now – Data Feed Guidelines

4. The best naming convention for photos is to use the employeeid.jpg so that photos have unique names that can easily be tracked back to an employee record.
5. Missing photos are automatically handled. You don't have to have a photo for each employee record.

Uploading Files to OrgChart Now

1. Select the 'FILE' tab
2. Click on the 'Upload' button



3. Select a destination directory (on the left).
4. Click on the 'Upload' button (at the top).
5. You will be prompted to select a file from your computer. Select a file and click Open. The file will be uploaded to OrgChart Now.
6. Repeat to upload additional files.
7. Click Exit (at the top) when done uploading files.

FTP/SFTP Drop Folders

Secure drop folders are available upon request. Email orgchartnow@officeworksoftware.com to request an FTP/SFTP account.

Drop folders can be used for:

1. Automated push of data files to OrgChart Now. Once an automated file push is in place, the OrgChart Now Scheduler can be used to automatically update your charts on a periodic basis (e.g. daily, weekly, monthly).
2. Mass upload of employee photos

Note: PGP encryption is also available upon request.