

OrgChart Now

People HR Org Chart Links

OfficeWork Software LLC

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OrgChart Now – People HR Org Chart Links

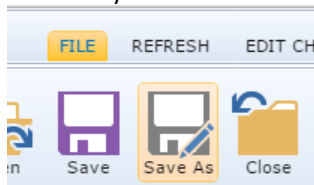
Introduction

OrgChart Now charts can be embedded directly in People HR. This document details how to embed your org chart in People HR.

OrgChart Now Setup

Use the following procedure to generate a link that can be embedded in People HR.

1. Log into OrgChart Now (account must have administrator privileges)
2. If you haven't done so already, create a 'read only' user id (See Appendix A for details)
3. Open your org chart (see the Getting Started Guide for more information on how to create a chart)
4. Save your chart in the 'Public' folder (Use the Save As option under the FILE tab)

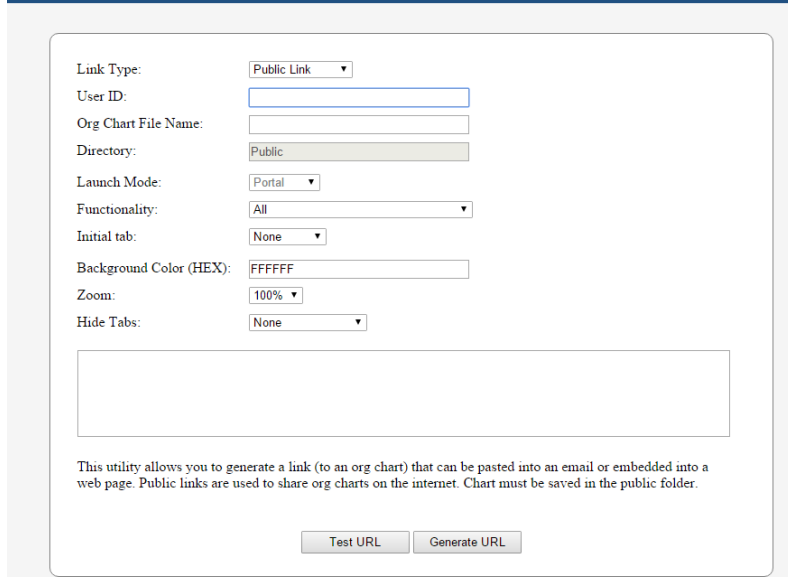


5. Click on the 'SHARE' tab
6. Select the 'Publish to Web' option.



7. The 'OrgChart Now – URL Generator' web form is displayed. You can either generate a 'Public Link' or a 'Restricted Link'. A 'Restricted Link' is more secure than a 'Public Link' but requires the OrgChart Now team to add a 'restriction' to our database. See Appendix B for additional details on Restricted Links.

OrgChart Now - URL Generator



The screenshot shows a web form titled "OrgChart Now - URL Generator". It contains several input fields and dropdown menus:

- Link Type: Public Link (dropdown)
- User ID: (text input)
- Org Chart File Name: (text input)
- Directory: Public (dropdown)
- Launch Mode: Portal (dropdown)
- Functionality: All (dropdown)
- Initial tab: None (dropdown)
- Background Color (HEX): FFFFFFFF (text input)
- Zoom: 100% (dropdown)
- Hide Tabs: None (dropdown)

Below the form is a large empty rectangular box. At the bottom of the form, there are two buttons: "Test URL" and "Generate URL".

This utility allows you to generate a link (to an org chart) that can be pasted into an email or embedded into a web page. Public links are used to share org charts on the internet. Chart must be saved in the public folder.

8. Fill in the following required fields:
 - a. Read Only User ID (See Step 2 above)
 - b. File Name (name of the chart you saved to the Public folder)

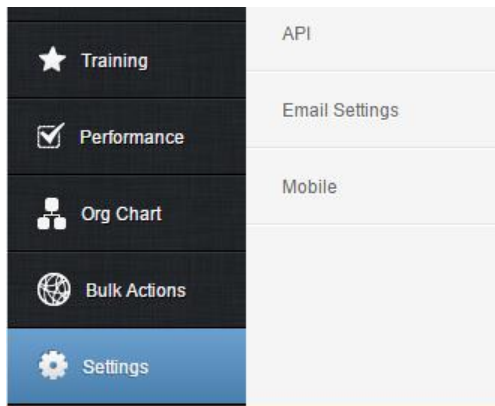
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9. Fill in other fields as desired. The default settings are typically ok; however, you can try different parameters if needed.
 - a. Functionality – Allows you to control what functions the end user can access (e.g. Publish to PDF or Export to Excel).
 - b. Initial Tab – Allows you to configure which tab is initially shown (e.g. Search or Profile)
 - c. Zoom – Typically set to 100%. Set to 75% or 50% if you have a large chart.
 - d. Hide Tabs – Allows you to hide tabs from the end user. For example, you may not want the end user to access the additional details shown in the Profile panel.
10. Click 'Test URL' to make sure the URL is working as expected.
11. Once you have the URL configured correctly, click on 'Generate URL'. The resulting URL will be used in the next step (People HR Setup).

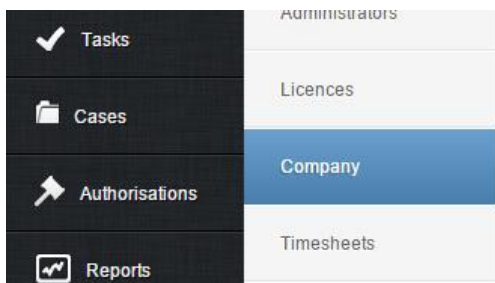
People HR Setup

Use the following procedure to set or update the org chart link in People HR.

1. Log into People HR (account must have administrator privileges)
2. Select the 'Settings' option on the left



3. Select the 'Company' option under Settings



4. In the 'Company' panel locate the 'Organisation chart' option. Make sure the option is 'Turned On' and then enter (or copy/paste) the link generated in the previous section in the 'Organisation chart external link' text box.

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Organisation chart

Organisation chart external link

5. Test the link by clicking 'Org Chart' option on the left.



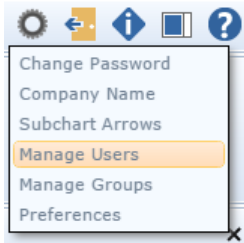
Assistance

Email orgchartnow@officeworksoftware.com for assistance.

Appendix A: Adding a Read Only User Account

Use the following procedure to add a read only user account.

1. Select the 'gear' icon and then select 'Manage Users'



2. Click on the 'Add User' button

A screenshot of the 'Manage Users' dialog box. At the top, there are four icons: a green plus sign (Add), a pencil (Update), a grey person with a red X (Delete), and a red X (Exit). Below these icons are four buttons: 'Add', 'Update', 'Delete', and 'Exit'. The main area of the dialog contains several fields and options: 'User ID' (text input), 'Email Address' (text input), three radio buttons for 'Read Only Seat' (selected), 'Read/Write Seat', and 'Administrator', a checkbox for 'Login Disabled', an 'Access Group' dropdown menu (set to 'Full Access'), and 'Initial Password: k9eely'. At the bottom right, there are 'Cancel' and 'Add' buttons.

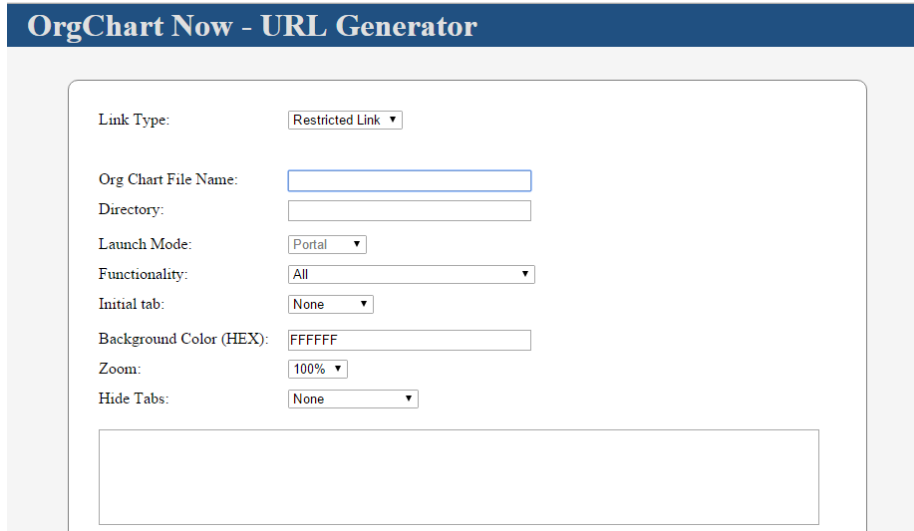
3. Enter a 'User ID'
4. Enter any email address (does not need to be valid). DO NOT USE your email address as it may already be used by your OrgChart Now account.
5. Click Add and then Click Exit.

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Appendix B: Restricted Links

To setup a restricted link follow the procedure above 'OrgChart Now Setup' procedure (above) with the following exceptions.

1. Select the 'Restricted Link' option in the 'OrgChart Now – URL Generator' form.
2. Save your chart to any folder other than the 'Public' folder (e.g. create a folder called 'Restricted'). Specify the chart 'Directory' in the 'Directory' field.
3. Email orgchartnow@officeworksoftware.com to request that a 'restricted link' for your People HR account. Make sure to include the URL (generated in the form) in the email.



The screenshot shows the 'OrgChart Now - URL Generator' form. The 'Link Type' dropdown is set to 'Restricted Link'. Other fields include: 'Org Chart File Name' (empty), 'Directory' (empty), 'Launch Mode' (Portal), 'Functionality' (All), 'Initial tab' (None), 'Background Color (HEX)' (FFFFFF), 'Zoom' (100%), and 'Hide Tabs' (None). A large empty text box is at the bottom of the form.