

Org Chart Explorer

Quick Setup Guide

Purpose

Follow these steps to install, configure, and validate Org Chart Explorer using the provided sample data.

1. Install the Package

Install using the provided URL and select 'Install for Admins Only'.

2. Assign Permission Set

Go to Setup → Permission Sets → Org Chart Explorer Admin → Manage Assignments → Assign to your user.

3. Open Org Chart Explorer

Open the App Launcher and select 'Org Chart Explorer'.

4. Configure the App

Set Hierarchy Object = Org Chart Position, Parent Field = Reports To, Root Mode = Top of Hierarchy, then click Save Config.

5. Load Sample Data

Click 'Download CSV Template' and import using Data Import Wizard.

6. Establish Relationships

Click 'Link Manager Relationships'.

7. Validate Data

Click 'Validate Hierarchy'.

8. View the Org Chart

Navigate to Org Chart Explorer and refresh. The chart loads automatically.

Result

A fully rendered org chart should display immediately upon refresh.

