

Org Chart Explorer

Administrator Guide

AppExchange managed package setup, configuration, import, and troubleshooting

IMPORTANT: Install and assign Org Chart Explorer Setup for administrators only. Standard users should only be given access to the Org Chart Explorer app and viewer permissions.

Audience	Salesforce administrators configuring Org Chart Explorer for packaged or custom hierarchy data.
Use this guide when	You are setting up the app for the first time, importing data into the packaged object, or troubleshooting chart display and access issues.

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1. Before You Begin

Use this guide only if you are administering Org Chart Explorer. The Setup tab is intended for administrators who can create or update the runtime Org Chart Setup record. End users only need the viewer app and search experience.

- If you are using your own custom hierarchy object, you will configure Org Chart Explorer to read your object and fields. The packaged CSV template and data tools do not apply to custom objects.
- If you are using the packaged OrgChart Position object, you can use the included CSV template, Link Manager Relationships, and Validate Hierarchy tools.
- The app enforces field access at runtime. If a field is configured for display, users assigned to the app must have access to that field through the appropriate permission set or profile.

Important: After you save a configuration, validate both the administrator and standard-user experience. A missing field permission can stop chart rendering.

2. What the App Does

Org Chart Explorer displays a selected record in context. The viewer can show the reporting chain, the selected focus card, direct reports, and peers reporting to the same manager.

- Search supports people or position lookup from the Explorer landing experience.
- Cards can display name, pronouns, title, department, location, email, phone, and an optional photo.
- You can configure a direct field model on the hierarchy object or use a related person lookup with override fields.
- Root behavior can start with search, a fixed record, or the top of the hierarchy.

3. Access and Permission Sets

Org Chart Explorer ships with separate administrator and user permission sets. Assign the correct permission set before testing.

Permission Set	Primary Use	What it should allow
Org Chart Explorer Admin	Setup and maintenance	Explorer tab, Setup tab, admin Apex classes, packaged object fields, Org Chart Setup fields, and packaged import tools.
Org Chart Explorer User	Viewing and navigation	Explorer tab, viewer Apex classes, and all fields configured for chart rendering and search.

Minimum setup access behavior:

- The Setup tab is available only when the signed-in user can create or update the Org Chart Setup object.
- The viewer app uses the saved runtime setup record. If setup has not been completed, the Explorer shows a setup-needed message instead of a chart.
- If a configured runtime field is not readable by the user, the chart can fail to load. Audit field-level security any time you change field mappings.

The screenshot displays the 'Org Chart Explorer Admin' setup window. It features two main sections: 'Available Permission Sets' on the left and 'Enabled Permission Sets' on the right. The 'Available' list includes 'Merchandiser', 'MuleSoftPublishInvocableActionsC2CPermSet', 'MuleSoftSeamlessLoginC2CPermSet', 'Orchestration Process Manager', 'Org Chart Explorer Admin' (highlighted in blue), 'Org Chart Explorer User', 'Partner Connect Partner Admin Setup', 'Payments Administrator', 'PromptTemplatePermSet', and 'Publish Suggested for You Nudges: Integration L'. Between the lists are 'Add' and 'Remove' buttons. The 'Enabled' list currently shows '--None--'. 'Save' and 'Cancel' buttons are located at the top and bottom of the window.

4. Org Chart Explorer Setup Walkthrough

Open Org Chart Explorer through the App Launcher, then select Org Chart Explorer Setup tab, and complete the sections in order.

4.1 Hierarchy Configuration

1. Choose the Hierarchy Object. The object list includes queryable, supported objects that the signed-in admin can access.
2. Select the Parent Field. This must be the lookup that defines the reporting relationship between records.
3. Select the Display Name Field. This is required and is used on cards and search results unless a related person display name override is configured.

When the packaged OrgChart Position object is selected, the setup page attempts to auto-map the packaged fields, including Reports To, Person Name, Title, Department, Location, Pronouns, Email, Phone, and Photo URL.

Org Chart Explorer Setup

Hierarchy Configuration

Hierarchy Object ⓘ

Org Chart Position (ocx__orgchart_position__c) ▼

Parent Field ⓘ

Reports To (ocx__reports_to__c) ▼

Hierarchy Object Person Display Fields

Display Name Field ⓘ

Person Name (ocx__person_name__c) ▼

Title Field ⓘ

Title (ocx__title__c) ▼

Department Field ⓘ

Department (ocx__department__c) ▼

Location Field ⓘ

Location (ocx__location__c) ▼

Pronouns Field ⓘ

Pronouns (ocx__pronouns__c) ▼

Email Field ⓘ

Email (ocx__email__c) ▼

Phone Field ⓘ

Phone (ocx__phone__c) ▼

Photo Field ⓘ

Photo URL (ocx__photo_url__c) ▼

4.2 Hierarchy Object Person Display Fields

These fields come directly from the hierarchy object. Only Display Name is required. The remaining fields are optional, but if you configure them, users must have access to them.

- Title Field - default title line on each card.
- Department Field - optional department value.
- Location Field - optional location value.
- Pronouns Field - optional pronouns line shown directly below the display name.
- Email Field - optional email shown in the metadata section.
- Phone Field - optional phone shown in the metadata section.
- Photo Field - optional image URL used for the card avatar.

4.3 Advanced Config - Related Person Fields

Use Person Lookup Field only if the hierarchy object points to a separate person record and you want to pull display values from that related record.

- Select a Person Lookup Field on the hierarchy object.
- Once selected, the Related Person Fields section appears.
- Any related-person field you populate overrides the equivalent hierarchy-object field when a related record value exists.
- If you do not need related person overrides, leave Person Lookup Field blank.

Hierarchy Configuration**Hierarchy Object** ⓘ

Account (account) ▼

Parent Field ⓘ

Reports To (ocx_reports_to__c) ▼

Hierarchy Object Person Display Fields**Display Name Field** ⓘ

Account Name (name) ▼

Title Field ⓘ

-- None -- ▼

Department Field ⓘ

-- None -- ▼

Location Field ⓘ

-- None -- ▼

Pronouns Field ⓘ

-- None -- ▼

Email Field ⓘ

-- None -- ▼

Phone Field ⓘ

-- None -- ▼

Photo Field ⓘ

-- None -- ▼

Advanced Config**Person Lookup Field** ⓘ

Primary Contact (ocx_primary_contact__c) ▼

Related Person Fields**Related Person Display Name Field** ⓘ

Full Name (name) ▼

Related Person Title Field ⓘ

Title (title) ▼

Related Person Department Field ⓘ

Department (department) ▼

Related Person Location Field ⓘ

-- None -- ▼

Related Record Pronouns Field ⓘ

-- None -- ▼

Related Person Email Field ⓘ

Email (email) ▼

Related Person Phone Field ⓘ

Business Phone (phone) ▼

Related Person Photo Field ⓘ

-- None -- ▼

Using existing Salesforce objects

If you configure Org Chart Explorer to use standard or custom objects outside the package, users must have access to the selected hierarchy object, parent field, and any related-person object and fields you map. For example, an Account + Contact configuration requires appropriate read access to the mapped Account and Contact fields. If card details are blank but cards still render, verify object, field, and record access for the configured source objects.

4.4 Save and Validate

Use Validate for quick client-side checks before saving. Save Config runs server-side validation and writes the runtime setup record.

- Validate checks that Hierarchy Object, Parent Field, and Display Name Field are populated. It also checks Root Record Id when Root Mode is Explicit Record and validates the highlight color format.

- Save Config validates the selected object and field mappings against the org schema and writes a single runtime Org Chart Setup record named Default.
- If save fails, correct the reported issue and try again. Common causes include invalid field mappings, missing field-level access, or lack of create or update permission on Org Chart Setup.

[Link Manager Relationships](#)
[Validate Hierarchy](#)
[Validate](#)
[Save Config](#)
Results

Configuration saved successfully.

5. Field Mapping Reference

The packaged object import template currently uses these headers. If you are importing into the packaged object, your CSV should contain these namespaced columns.

CSV Header	Purpose	Typical Setup Mapping
ocx__Position_ID__c	Unique position identifier used for import matching.	Not used as a display field; required for Link Manager Relationships.
ocx__Reports_To_Position_ID__c	Manager position identifier from the same dataset.	Not mapped in Setup; used by Link Manager Relationships to populate Reports To.
ocx__Title__c	Position title.	Title Field
ocx__Department__c	Department value.	Department Field
ocx__Location__c	Location value.	Location Field
ocx__Person_Name__c	Primary display name value.	Display Name Field or fallback data source
ocx__Preferred_Name__c	Preferred display name value.	Optional packaged-object display behavior if used
ocx__Email__c	Email address.	Email Field
ocx__Phone__c	Phone number.	Phone Field

CSV Header	Purpose	Typical Setup Mapping
ocx__Photo_URL__c	Profile photo URL.	Photo Field
ocx__Pronouns__c	Pronouns value.	Pronouns Field

Important:

The Position ID and Reports To Position ID fields can contain **any unique values** (for example: numbers, employee IDs, position codes, or even names).

To ensure relationships are created correctly:

- Each Position ID value is unique within the dataset
- Each Reports To Position ID value **must exactly match (including spacing and capitalization)** another record's Position ID

These values are used only to establish relationships during import and are not displayed in the org chart.

Example:

If a record has Position ID = "CEO" and another record has Reports To Position ID = "CEO", the second record will report to the first.

Template update note: Older guide text referenced fields such as Is Vacant, Is Active, and Sort Order. Those fields are not part of the current packaged CSV header list provided for this release.

6. Search and Startup Options

The Search and Startup section controls how end users begin in the Explorer and includes a test search tool for administrators.

- Test Search uses the current unsaved configuration and requires at least 2 characters.
- The search box placeholder is 'Search by name, title, or email'. Results display the name, subtitle, and email when available.
- Root Mode controls startup behavior:
- Search First - the viewer opens without a selected chart and prompts the user to search.
- Explicit Record - the viewer loads a fixed record using the provided Root Record Id.
- Top of Hierarchy - the viewer looks for the first record with no parent and opens that record.

Search and Startup

Test Search ⓘ

Search people or positions Run Test Search

Root Mode ⓘ

Search First

Root Record Id ⓘ

Focus Highlight Color ⓘ

#1b96ff

☒ Show Breadcrumbs ⓘ

7. Packaged Object Import Workflow

Use this workflow only when loading records into the packaged OrgChart Position object. If you are using your own custom hierarchy object, skip this section.

- 1) Complete the Setup page and save a valid configuration for the packaged object.
- 2) Prepare a CSV file using the packaged headers exactly as provided in the current template.
- 3) Import the CSV into the packaged object using Data Import Wizard or Data Loader.
- 4) Do not attempt to populate Reports To directly during the first import unless you already have valid Salesforce record IDs.
- 5) After the import, return to Setup and run Link Manager Relationships.
- 6) Then run Validate Hierarchy and resolve any reported issues.

Recommended mapping for the packaged object:

- Hierarchy Object = ocx_OrgChart_Position__c
- Parent Field = ocx_Reports_To__c
- Display Name Field = ocx_Person_Name__c (Note: updating the preferred name field will display that name instead, but both fields are searchable)
- Title Field = ocx_Title__c
- Optional fields = ocx_Department__c, ocx_Location__c, ocx_Pronouns__c, ocx_Email__c, ocx_Phone__c, ocx_Photo_URL__c

8. Data Import Tools

8.1 Link Manager Relationships

This tool scans packaged Org Chart Position records with Position ID values and populates the Reports To lookup by matching Reports To Position ID against another position's Position ID.

- Scanned - number of positions evaluated.
- Updated - number of records whose Reports To lookup changed. (Note: Should always show one less updated record than total scanned assuming 1 root position)
- Invalid manager IDs - count of rows where Reports To Position ID did not match any position in the imported dataset.
- Circular references - count of self-references or direct two-record circular relationships that were skipped.

What the tool does not do:

- It does not import data for you.
- It does not resolve long multi-record circular chains beyond the immediate checks built into the resolver.
- It does not work for custom hierarchy objects; it is only for the packaged Org Chart Position object.

Data Import Tools (Packaged Object Only)

These tools are only used when importing data into the packaged **OrgChart_Position__c** object using the provided CSV template. They do not apply to custom hierarchy objects configured above.

Resources

Use the CSV template to prepare your position data before importing it into OrgChart_Position__c.

[Download CSV Template](#)[Download Import Guide](#)

Data Tools

Use Link Manager Relationships after importing positions to connect manager lookups using Position IDs. Use Validate Hierarchy to check for structural data issues.

[Link Manager Relationships](#)[Validate Hierarchy](#)[Validate](#)[Save Config](#)

Results

Scanned: 20 positions. Updated: 19. Invalid manager IDs: 0. Circular references: 0.

8.2 Validate Hierarchy

This tool evaluates the packaged Org Chart Position hierarchy after import or data maintenance.

- Self-references - a record reports to itself.
- Broken parent references - parent lookup points to a missing record.
- Circular relationships - one or more positions are part of a cycle.
- Root positions - positions with no Reports To value.
- Disconnected nodes - positions that are not reachable from any root and are not already counted as part of a cycle.

Messages are capped to avoid overly large result blocks. Use the count totals as the primary signal and the returned messages as examples to investigate.

Data Tools

Use Link Manager Relationships after importing positions to connect manager lookups using Position IDs. Use Validate Hierarchy to check for structural data issues.

[Link Manager Relationships](#)[Validate Hierarchy](#)[Validate](#)[Save Config](#)

Results

Scanned: 20 positions. Self-references: 0. Broken parent references: 0. Circular relationships: 0. Root positions: 1. Disconnected nodes: 0.

- Root position detected: P-0000 (President)

9. Explorer Behavior for End Users

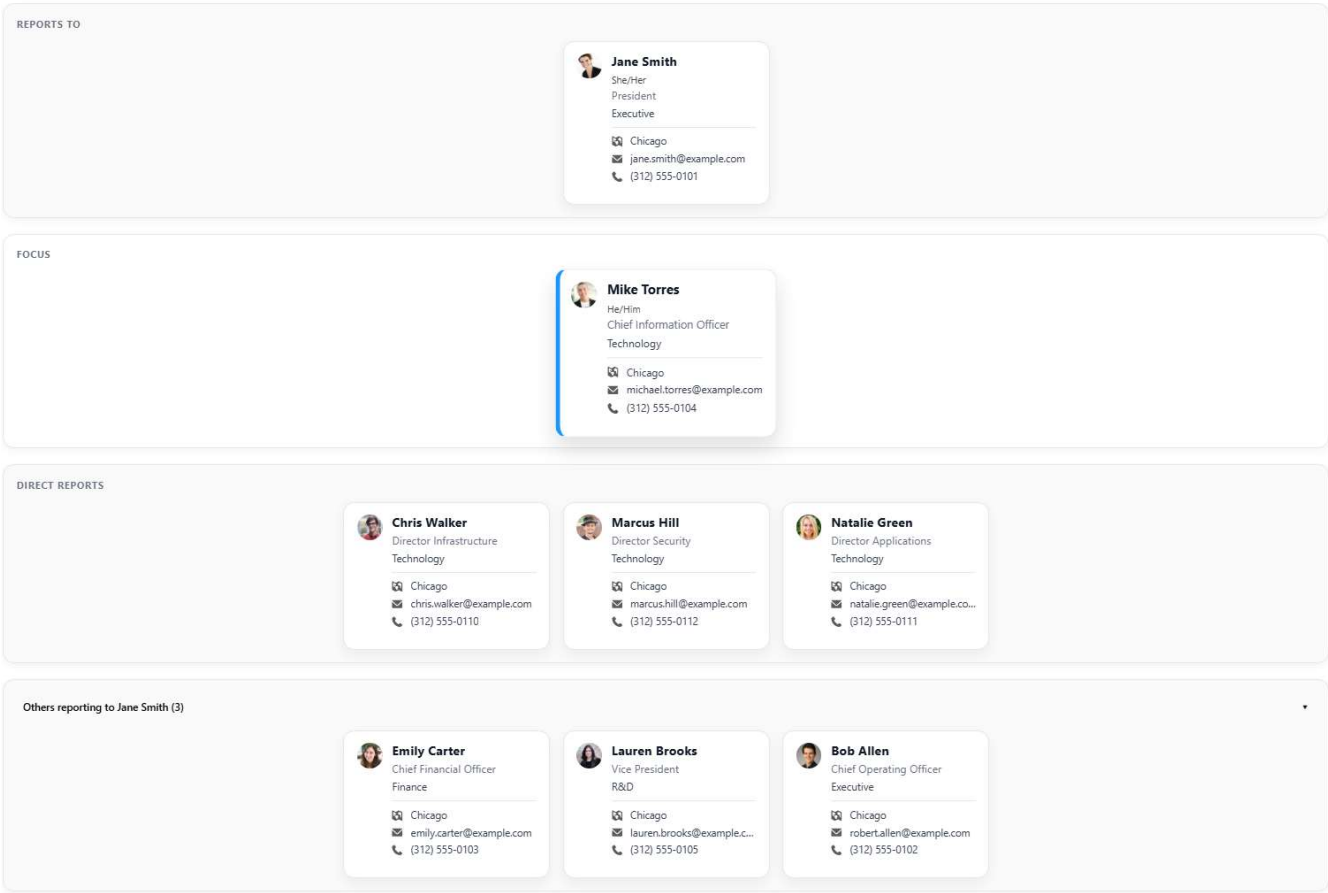
Once setup and data are valid, the Explorer provides these behaviors:

- Search opens a dropdown after 2 or more characters.
- Selecting a search result loads the selected record in context.
- The Focus card is highlighted using the configured highlight color.
- If enabled, Reporting Chain breadcrumbs appear above the chart.
- Reports To shows the selected record's manager when one exists.
- Direct Reports shows all immediate children.
- Others reporting to [Manager Name] shows peers in a collapsible drawer.
- Back to Start appears when the selected record differs from the initial loaded record.

Card display order:

- Display name
- Pronouns, if configured and populated
- Title
- Department
- Location
- Email
- Phone

If a photo URL is blank, the card shows a two-letter initials avatar. If there is no usable display name, the card falls back to Vacant and the initials avatar uses VC.



10. Photo URL Guidance and CSP

For best results, use Salesforce Static Resources for profile photos.

- Recommended format: /resource/YourResourceName/image.jpg
- External image URLs may work in some orgs but are not guaranteed.
- Many orgs block external image sources through Content Security Policy (CSP) settings.
- Org Chart Explorer does not manage CSP Trusted Sites and should not require org-level CSP changes for normal operation.
- If a photo does not load or the photo field is blank, the app falls back to an initials avatar instead of showing a broken image.

Recommendation: Document one approved image-hosting approach for your admins. Static Resources are the safest packaged-app option.

11. Troubleshooting

Issue	Likely Cause	What to Do
Explorer says setup is incomplete	No runtime setup record has been saved, or the signed-in user cannot	Open Setup as an admin, complete required fields, save the

Issue	Likely Cause	What to Do
	read the saved config.	configuration, and verify user access to Org Chart Setup.
You do not have access to field: ...	A configured runtime field is missing from the assigned permission set or profile.	Add field-level read access for the field to the appropriate permission set, then retest.
Search returns no matches	Term is too short, search fields are not populated, or imported data does not contain expected values.	Use 2 or more characters, confirm the saved config, and verify data in the mapped name, title, or email fields.
No hierarchy data found	Setup is valid but there are no matching hierarchy records, or Top of Hierarchy cannot find a root.	Confirm records exist, verify parent values, and rerun import and link steps if using the packaged object.
Link Manager Relationships reports invalid manager IDs	Reports To Position ID values do not match any Position ID in the same dataset.	Correct the source CSV values, reimport as needed, then rerun Link Manager Relationships.
Validate Hierarchy reports disconnected nodes	One or more records are not reachable from a root position.	Review parent relationships, identify the intended root, and correct broken or missing manager assignments.
Photos do not appear	Photo field is blank, URL is invalid, or an external image is blocked by CSP.	Use a valid Static Resource URL or accept the initials avatar fallback.

12. Frequently Asked Questions

Can I use my own custom object instead of the packaged object?

Yes. Select your custom hierarchy object in Setup and map the required fields. The packaged import tools do not apply to custom objects.

Do I need a related person lookup?

No. Use it only if your hierarchy object points to a separate person record and you want to override display values from that related record.

Can I use external photo URLs?

Possibly, but they are not guaranteed to work because of org CSP settings. Static Resources are recommended.

Why does save fail even when the form looks complete?

Server-side validation still checks object existence, field mappings, and your create or update access to Org Chart Setup. Review the returned error message and permission set.

Should I map Person Name or Preferred Name as the Display Name Field?

Use the value you want admins and end users to see most often. If both are populated in the packaged object, test the final card display and search behavior in your org.

13. Recommended Post-Setup Validation

4. Assign the administrator permission set to a test admin and confirm Setup opens, saves, and the packaged import tools work if you use the packaged object.
5. Assign the user permission set to a non-admin test user and confirm the Explorer opens without setup or field-access errors.
6. Test the configured root mode.
7. Run a search using a known name, title, or email.
8. Select a record and confirm Reports To, Direct Reports, peers, and breadcrumbs behave as expected.
9. Confirm the focus highlight color looks correct.
10. Verify photo behavior with both a valid image URL and a blank photo value.

Go-live recommendation: Complete one final admin test and one final standard-user test in the target org after all packaging changes, permission updates, and guide updates are deployed.

Recommended Permission Assignment

Org Chart Explorer Admin: Assign to administrators responsible for setup, configuration, and data management.

Org Chart Explorer User: Assign to standard users who will only view and navigate the org chart.

Best Practice: Do not assign admin permissions broadly. Limit setup access to a small group of trained administrators.