

Org Chart Setup Instructions

OVERVIEW

Org Chart is a lightning ready responsive component which enables the user to view the hierarchy, managers, peers and reportees of any employee of his organisation. It is ready to use from mobile or in any view (Page, Quick Action, Utility) of Desktop.

FEATURES

1. Complete user hierarchy includes Manager Hierarchy, Peers and Reportees
2. Can be accessed from mobile and any view of desktop(Page,Quick Action, Utility bar)
3. Simple and easy to setup
4. Works on the Standard User object with manager field as the report parameter

SETUP INSTRUCTIONS

Data Setup

Org chart component uses **User** standard object to render the chart. It uses **Manager** field to build the hierarchy. The below screenshot helps you to understand the field mapping. Field names are

The screenshot displays the Salesforce Org Chart component. The main area shows a hierarchy of users. At the top, a search bar labeled "Search by Name" is present. Below it, a vertical list of users is shown, with arrows indicating the hierarchy. The users are: Walter Stone, Jeffery Newsom, and Benton Heckstall. Below them, a horizontal list of users is shown, with arrows indicating the hierarchy. The users are: Marcus Carra, Matt Schoenborn, Darius Shine, Clair Anvin, Merlin Steier, Jessica Pang, and Deborah Reynolds. Annotations with arrows point to the following fields: "Name" (points to Walter Stone), "Manager" (points to Jeffery Newsom), "FullPhotoUrl" (points to Marcus Carra), "Title" (points to Marcus Carra), "Phone" (points to a phone icon), and "Email" (points to an email icon). On the right side, there is a sidebar with a "Performance" section showing a score of 5, a "Recent Records" section with a list of users, and an "Assistant" section. The top navigation bar includes tabs for Sales, Home, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Files, Dashboards, Reports, Quotes, and OrgchartDesign.

App Configuration

1. Install the app from the App exchange
2. Desktop configuration
 - a. Edit the page, Drag the Component 'Orgchart'
 - b. If you want to adjust height, change it using the Height variable (Eg: 700px)
 - c. If you want to adjust view, Use **Desktop** or **Mobile** options in the Placeholder variable
3. Mobile configuration
 - a. There is a tab 'Org Chart' in the package
 - b. Add the tab to the Salesforce Mobile Navigation

Note:

This version supports only 100 employees in the Hierarchy.