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ICL Services OrgChart

User guide

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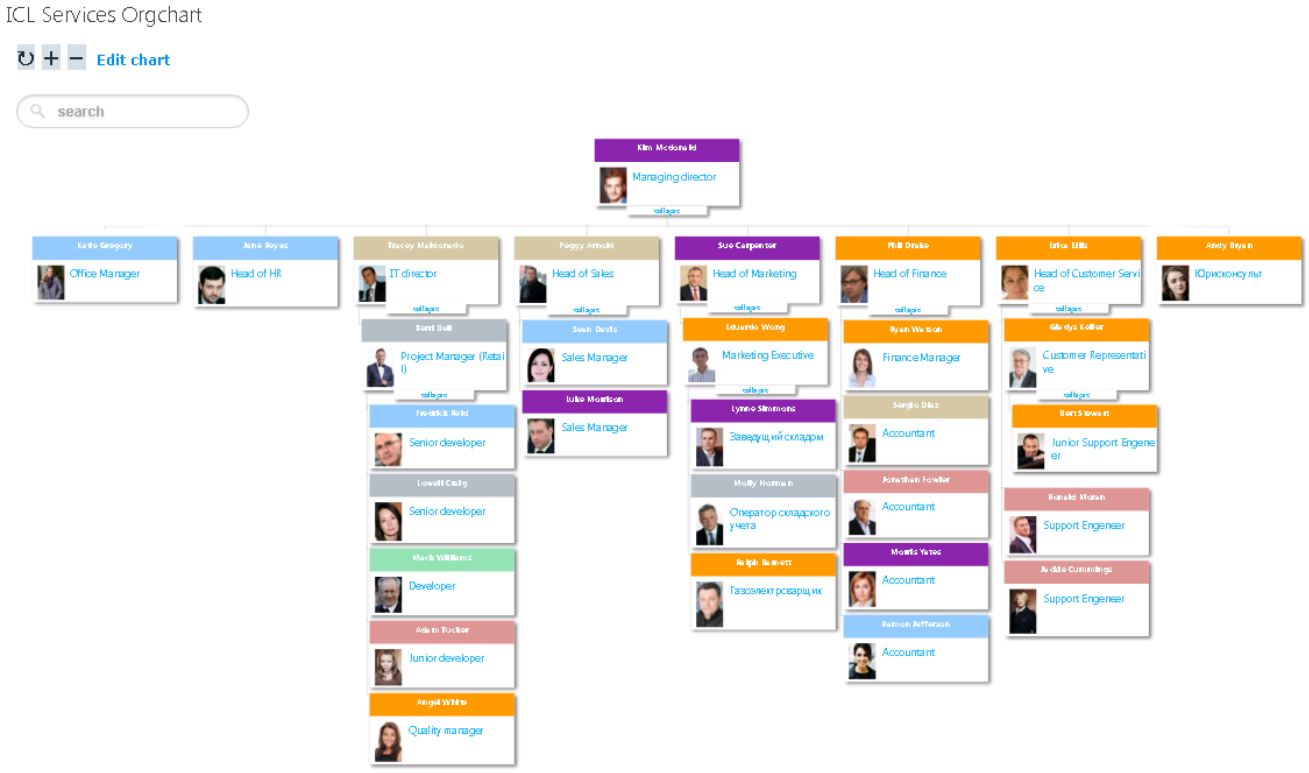
1. Intro

'ICL Services OrgChart' is a component to explore org structure in 2 views with search and zooming for SharePoint 2013 and higher.

You can format boxes using HTML, design organizational chart with HTML templates according to your brand book and add new fields.



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Important: Free version of product supports only 5 levels of items. If your organization needs more, please contact us on SharePointOfficeStore@icl-services.com

Sharepoint 2013 and higher Web Part Farm Solution version is also supported. It shows information from lists, SQL databases and REST web services.To try or buy webpart, please contact us on SharePointOfficeStore@icl-services.com

2. Installation

Install 'ICL Services OrgChart' app from SharePoint AppStore.

Add an App Part to a page:

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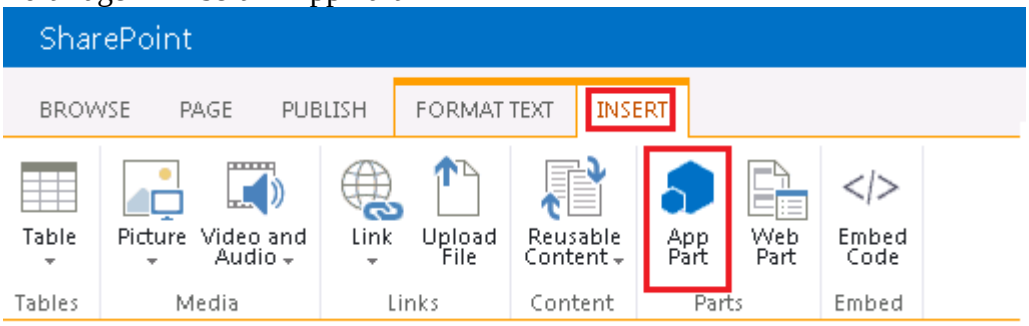
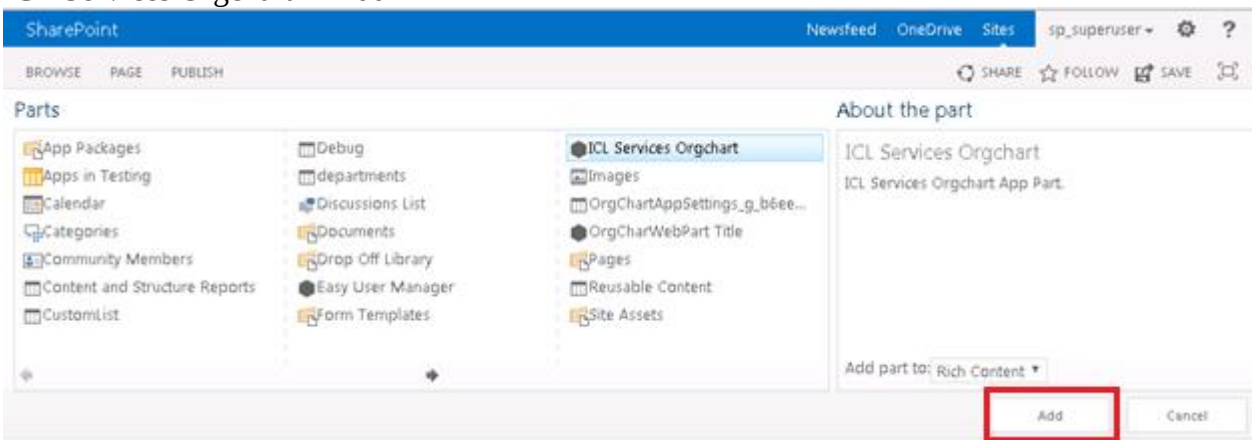
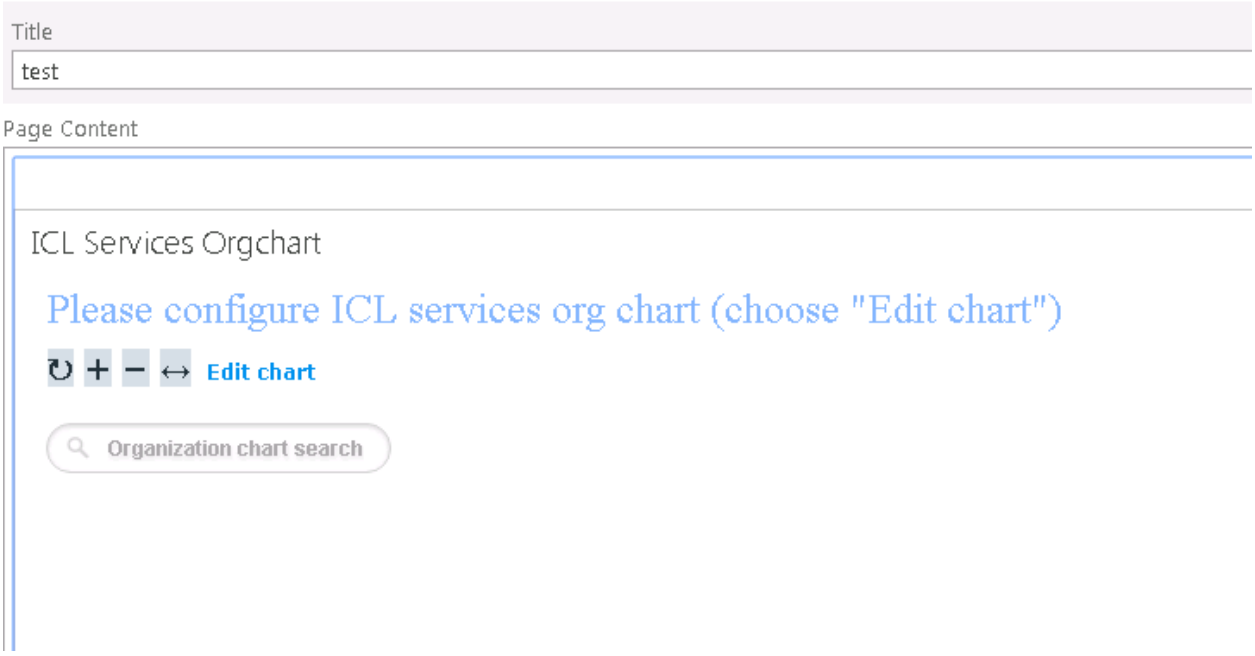
1) Edit Page → Insert →App Part



2) ICL Services Orgchart →Add



3) Click **Save** at the page ribbon.



3. Configuration

Click Edit Chart, Orgchart Settings window will appear

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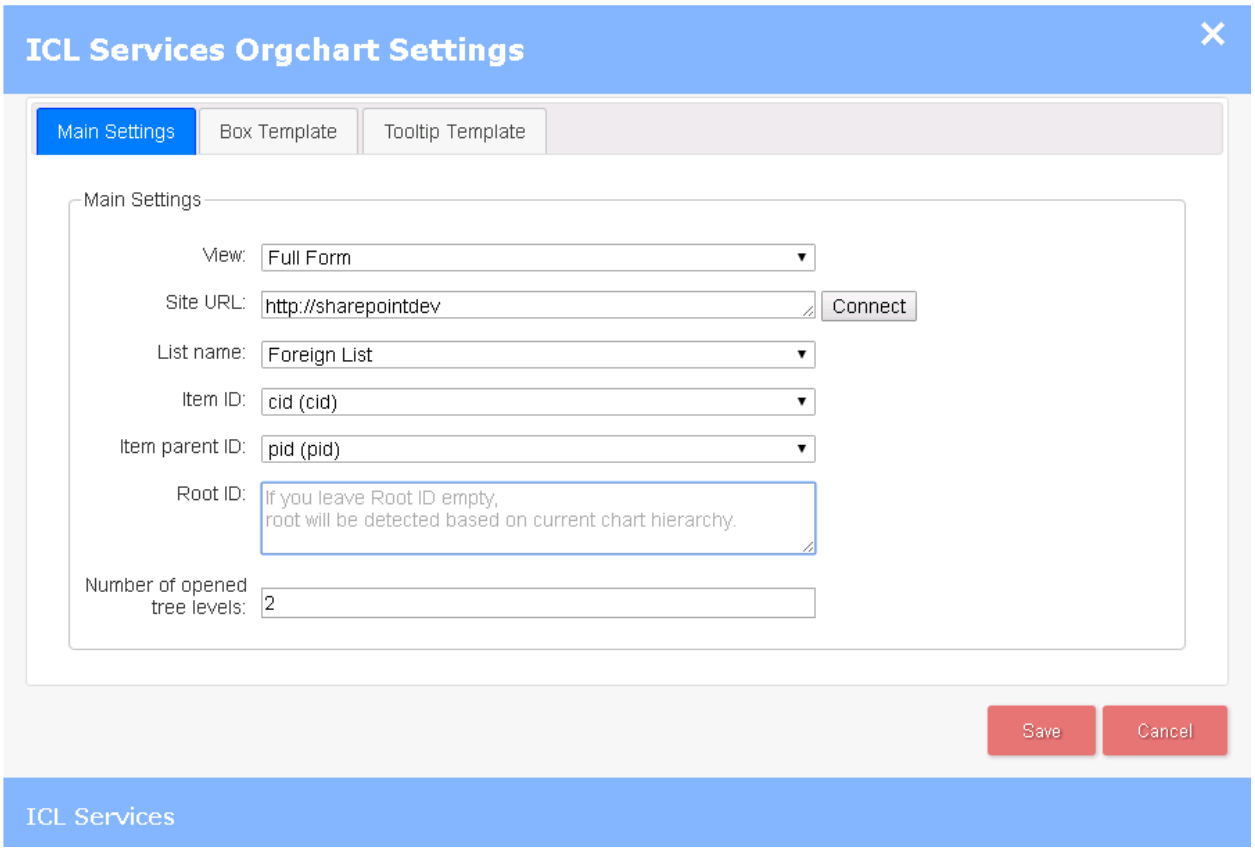
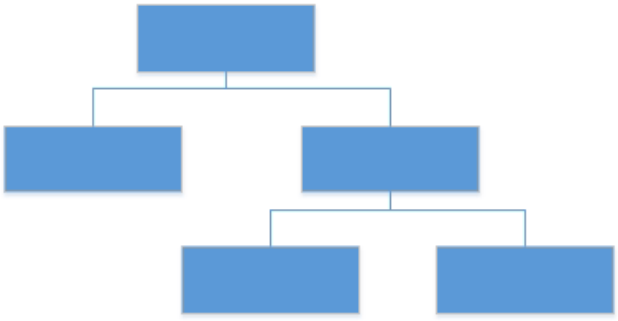
3.1 Main settings



ICL Services Orgcharg supports Full and Short forms of **View**.

Full form is the usual one that is provided by most orgchats:



It’s not that useful in case of big number of departments. So we invented a short form that arranges items like in windows file explorer starting from the second level.

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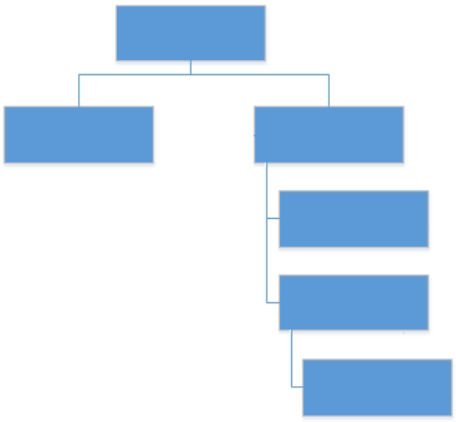

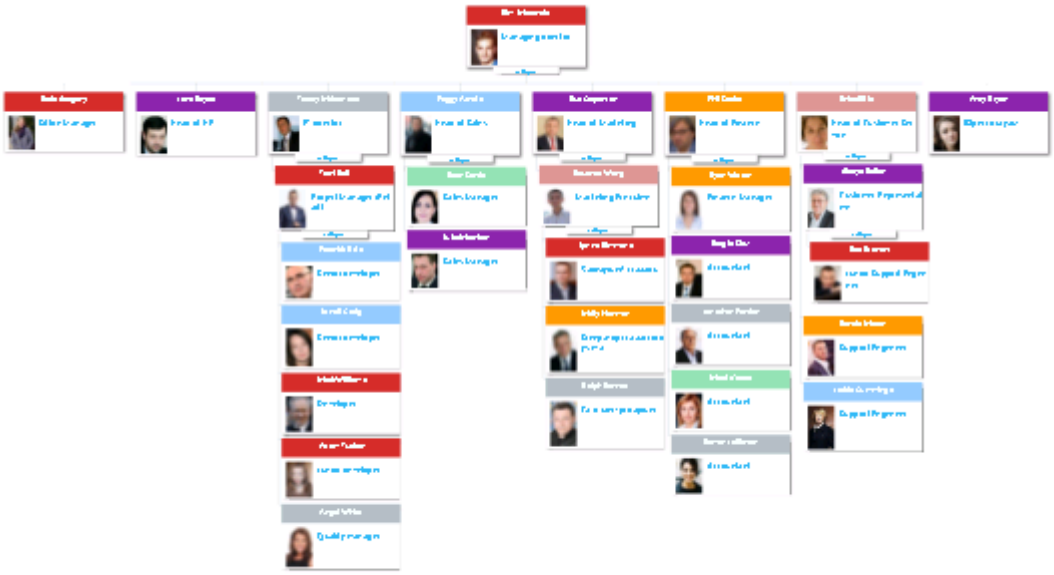

Choose SharePoint list from a '**List name**' combo box. '**List name**' selects all list from site in '**Site URL**'.

Map '**Item ID'** and '**Item parent ID**', they are used to build hierarchy.

If '**Root ID**' is empty, Orgchart shows all the items from list. Fill it by value from ID field to show only items starting from certain item.

Cid field is chosen as **'Item ID'** in an example below. cid values are Head of HR, IT Director, Marketing Director etc. Let us enter IT Director to '**Root Id**' to show only Marketing Director subordinates:

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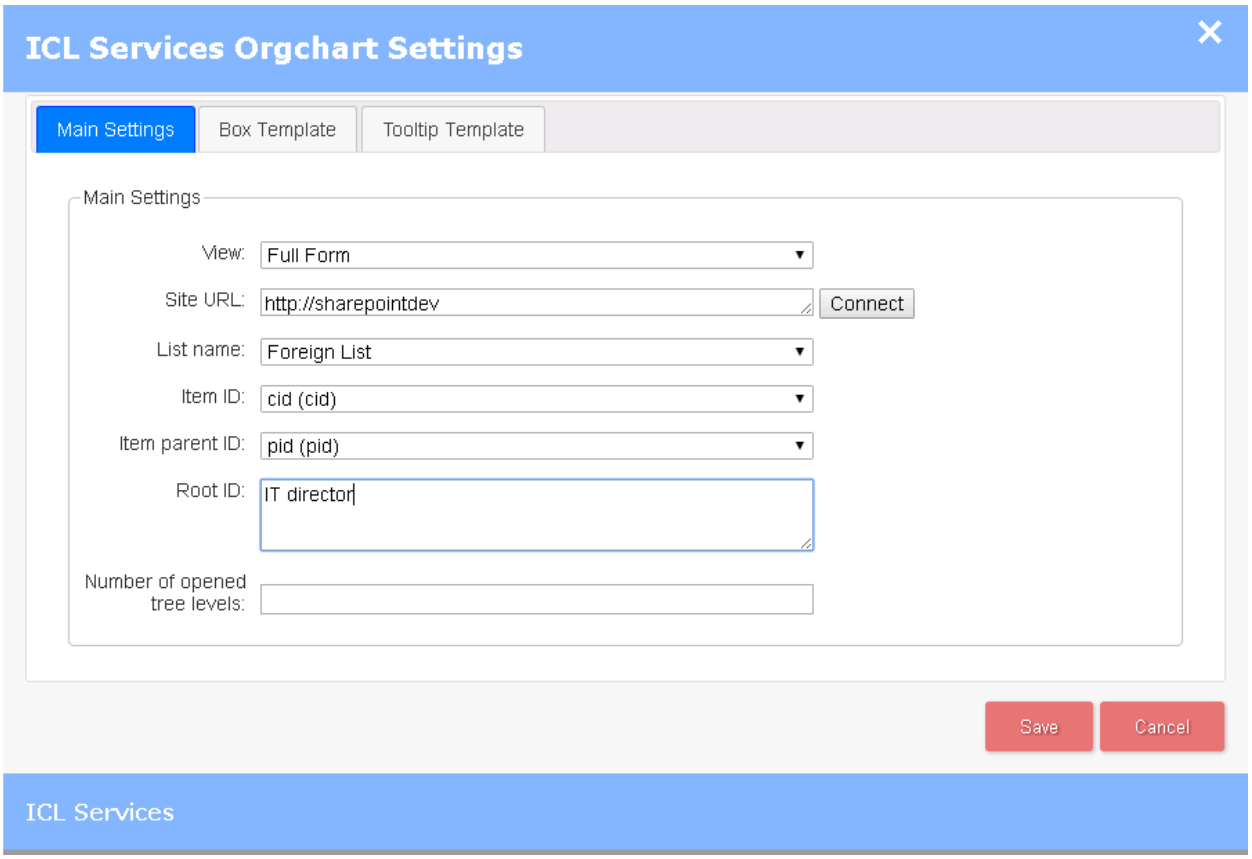

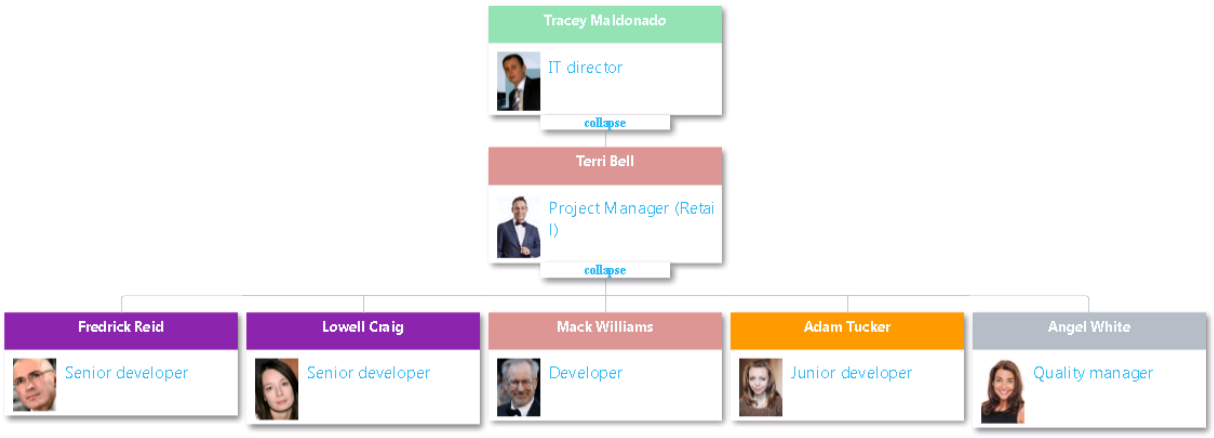

Insert the numeric value to '**Number of opened tree levels**' to show ICL Services OrgChart partly collapsed.

Below is the example of Orgchart view when '**Number of opened tree levels'** = 2

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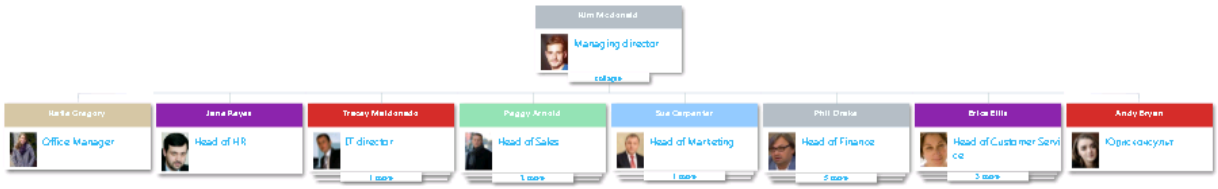
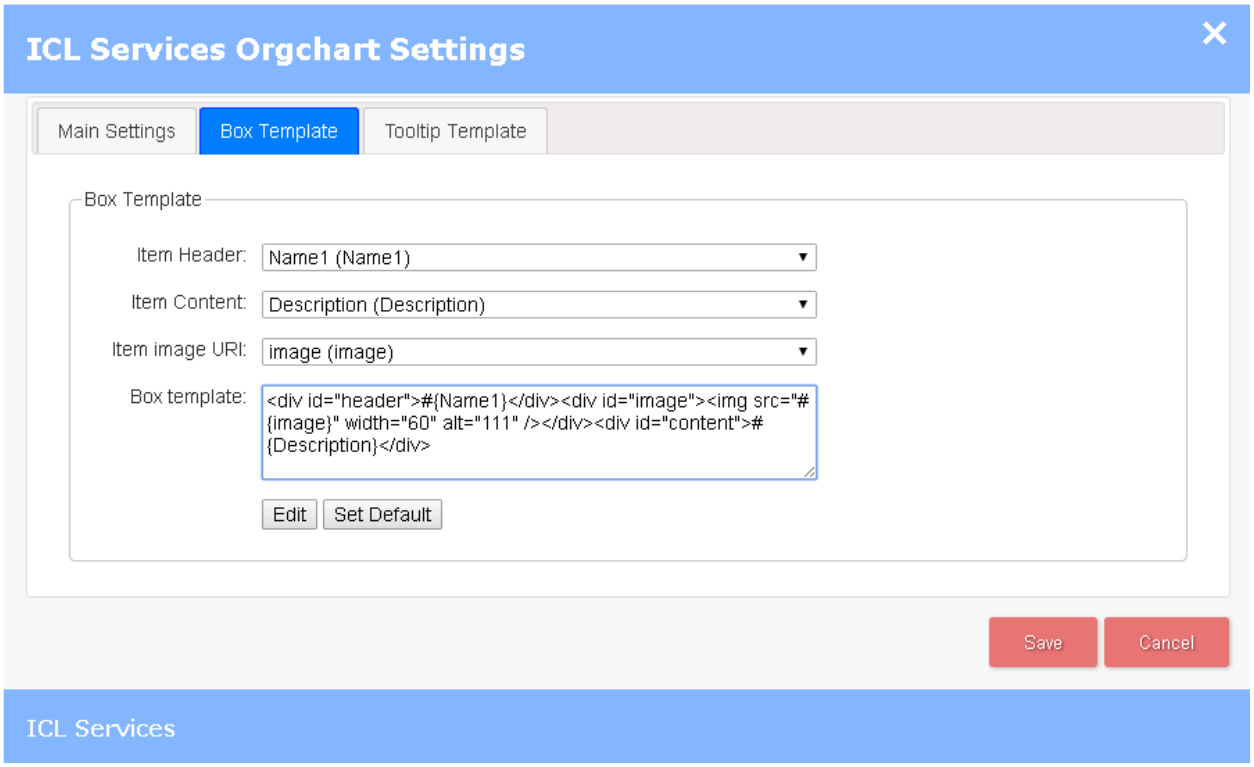


3.2 Box template



Select Header, Content and Image URI to set information that will appear in organization chart boxes. You can always add fields or change the way they are presented using the **'Box template**' field. It supports all HTML 5 tags and javascript. Fields are addressed using #{} symbols, for example #{Name 1} shows the contents of field Name 1 in {div} block. If something goes wrong after changing athe template, you can always return back to default value by clicking **'Set default'** button.

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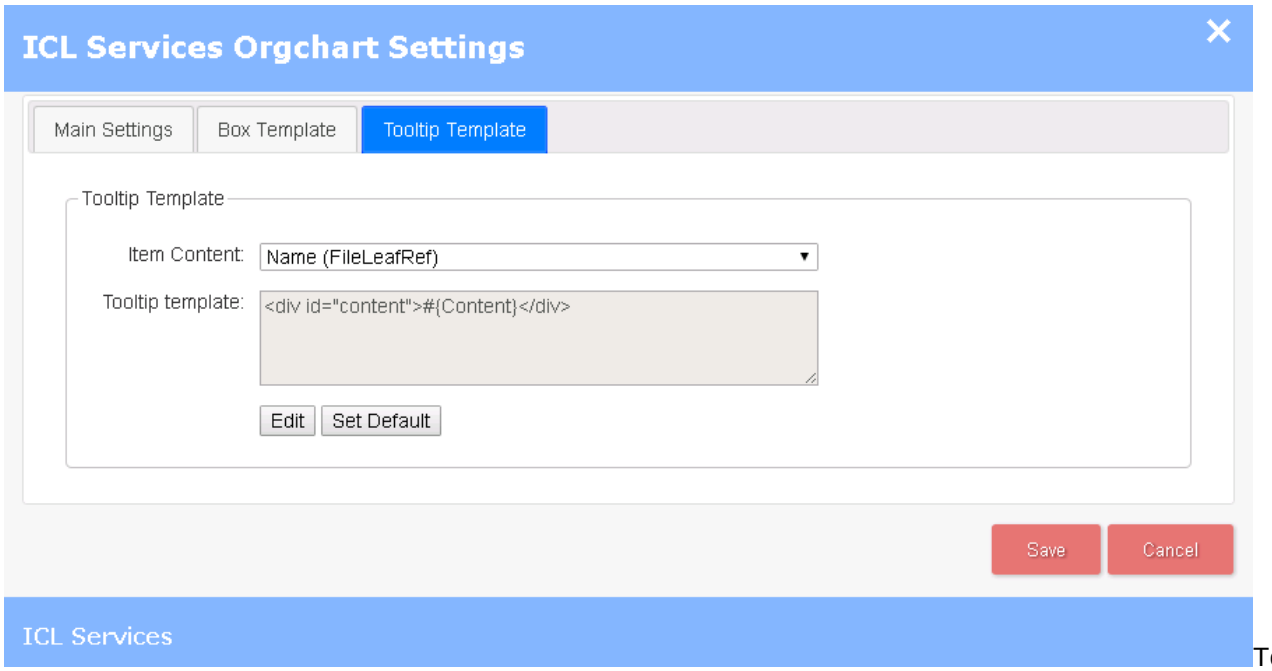
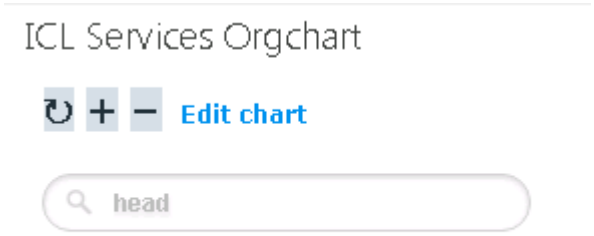
3.3 Tooltip template



Tooltip can also be selected using **'Item content'** field or changed in a **'Tooltip template'** field manually.

4. Search and zoom



+ and − buttons resize OrgChart, ↻ retutns it to original size.

Start typing in **Search** field, you will see the list of items found below.

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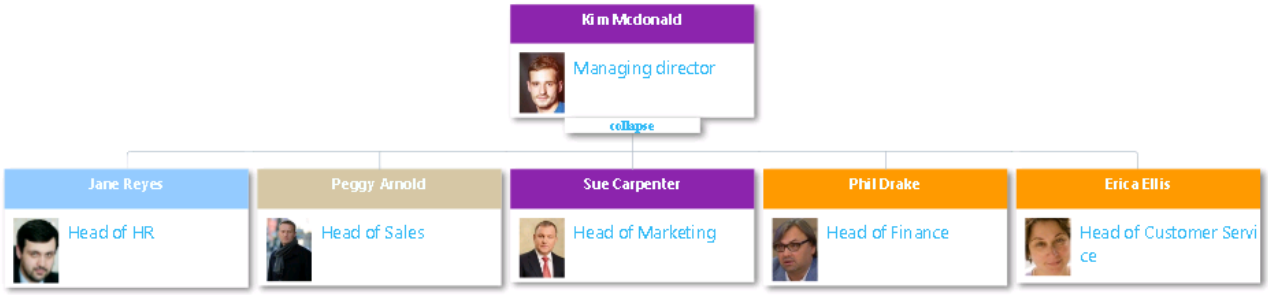
ICL Services Orgchart

Edit chart

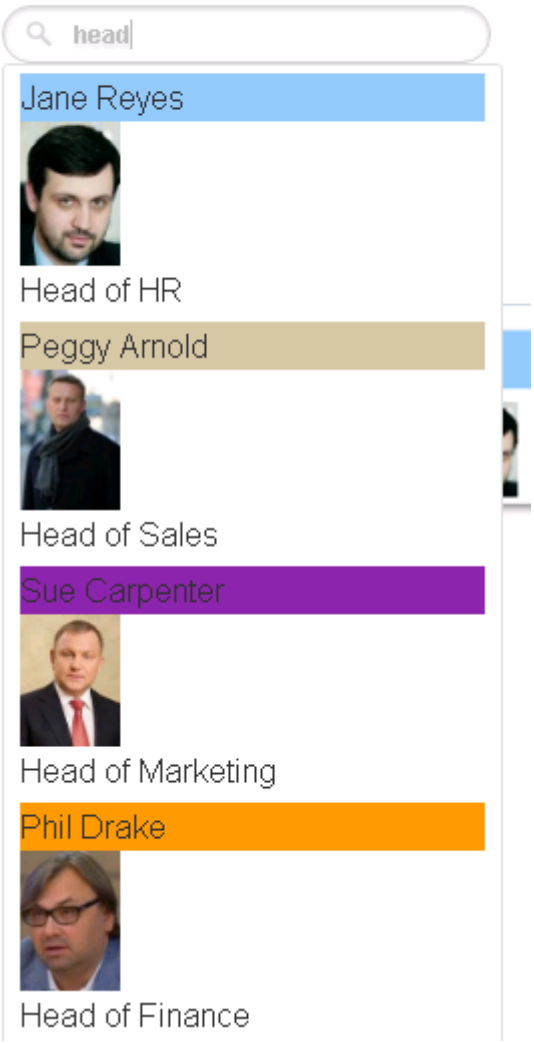
head



ICL Services Orgchart

Edit chart

head



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Press enter in **Search** field, ICL Services OrgChart will show only items that fit to search and their accendances.

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