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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.







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

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 <u>SharePointOfficeStore@icl-services.com</u>

2. Installation

Install 'ICL Services OrgChart' app from SharePoint AppStore.

Add an App Part to a page:



1) Edit Page \rightarrow Insert \rightarrow App Part



2) ICL Services Orgchart \rightarrow Add

SharePoint		N	ewsfeed OneDrive Sites	sp_superuser + 🔯	?
BROWSE PAGE PUBLISH			Q SHARE	SAVE	Þ
Parts			About the part		
App Packages Apps in Testing Calendar Categories Content and Structure Reports CustomList	Debug departments Discussions List Documents Drop Off Library Easy User Manager Form Templates	CL Services Orgchart Trages OrgChartAppSettings_g_b6ee OrgChartWebPart Title Pages Reusable Content Site Assets	ICL Services Orgchai ICL Services Orgchart App	rt Part.	
4	•		Add part to: Rich Content	•	
				Add Cance	8.2

3) Click Save at the page ribbon.

Title			
test			
Page Content			

ICL Services Orgchart
Please configure ICL services org chart (choose "Edit chart")
\mathbf{U} + - \leftrightarrow Edit chart
Q Organization chart search

Configuration 3.

Click Edit Chart, Orgchart Settings window will appear





3.1 Main settings

ICL Services (Orgchart Settings	×
Main Settings Box	x Template Tooltip Template	
Main Settings		
View:	Full Form	
Site URL:	http://sharepointdev	
List name:	Foreign List	
Item ID:	Cid (cid)	
Item parent ID:	i pid (pid)	
Root ID:	If you leave Root ID empty,	
	Tool will be detected based on current chart hierarchy.	
Number of opened tree levels:	2	
	Sav	e Cancel
ICL Services		

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.



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:





ICL Services Orgchart Settings	×
Main Settings Box Template Tooltip Template	
Main Settings	
View: Full Form	
Site URL: http://sharepointdev Connect	
List name: Foreign List	
Item ID: cid (cid)	
Item parent ID: pid (pid)	
Root ID: IT director	
Number of opened	
Save Cancel	
ICL Services	

		Tracey Maldonado		
		IT director		
		collapse		
		Terri Bell		
		Project Manager (Retai		
		collapse		
Fredrick Reid	Lowell Craig	Mack Williams	Adam Tucker	Angel White
Senior developer	Senior developer	Developer	Junior developer	Quality manager

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



3.2 Box template

ICL Services Orgchart Settings	×
Main Settings Box Template Tooltip Template	
Box Template	
Item Header: Name1 (Name1)	
Item Content: Description (Description)	
Item image URI: image (image)	
Box template: <div id="header">#{Name1}</div> <div id="image"><img alt="111" src="#
{image}" width="60"/></div> <div id="content"># {Description}</div>	
Edit Set Default	
	_
Save	Cancel
ICL Services	

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 <div>#{Name 1}</div> 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.



3.3 Tooltip template

ICL Services Orgchart Settings	×
Main Settings Box Template Tooltip Template	
Tooltip Template	
Item Content: Name (FileLeafRef)	
Tooltip template: <div id="content">#{Content}</div>	
Edit Set Default	
Save	
ICL Services	

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

4. Search and zoom



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



ICL Services Orgchart







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