

ICL Services OrgChart

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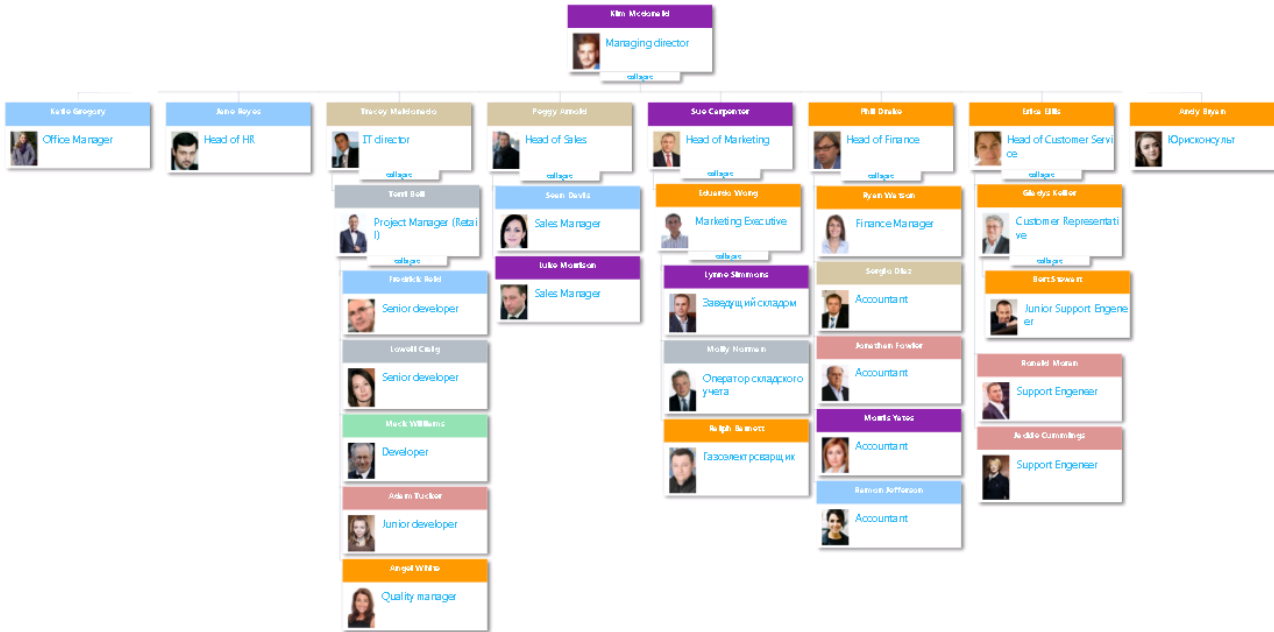
1. Intro

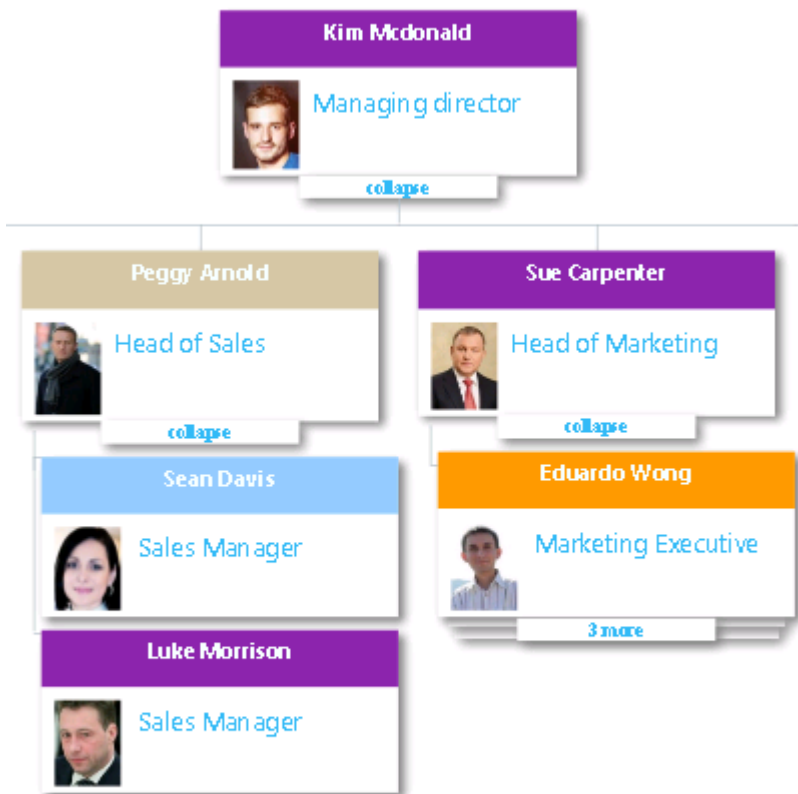
'ICL Services OrgChart' is a component to explore org structure in 2 views with search and zooming for SharePoint 2013 and higher.

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

ICL Services Orgchart

[Edit chart](#)





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

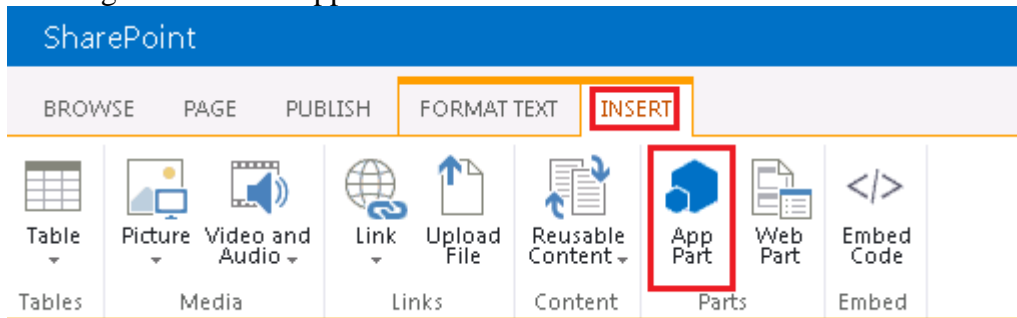
Sharepoint 2013 and higher Web Part Farm Solution version is also supported. It shows information from lists, SQL databases and REST web services. To try or buy webpart, please contact us on SharePointOfficeStore@icl-services.com

2. Installation

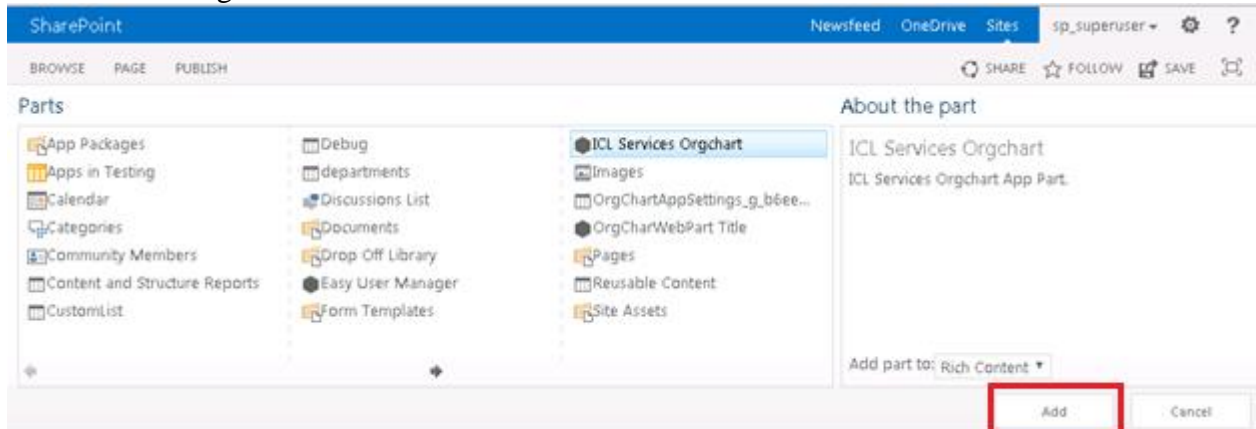
Install 'ICL Services OrgChart' app from SharePoint AppStore.

Add an App Part to a page:

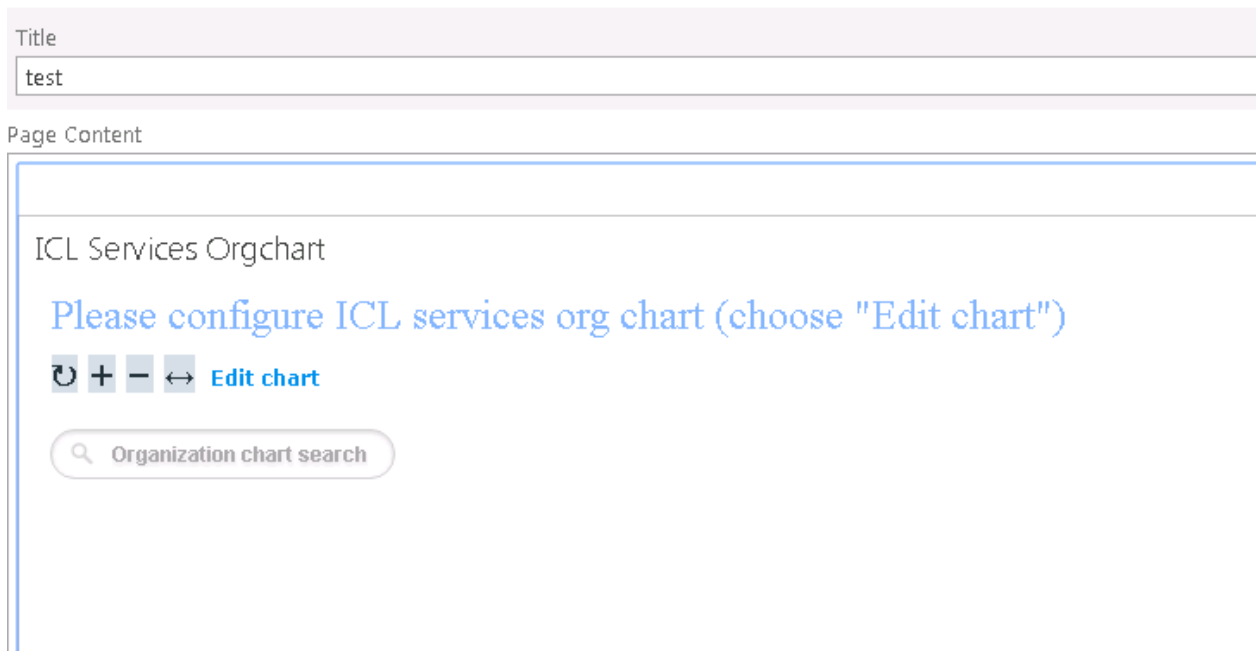
1) Edit Page → Insert → App Part



2) ICL Services Orgchart → Add



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



3. Configuration

Click Edit Chart, Orgchart Settings window will appear

3.1 Main settings

ICL Services Orgchart Settings
✕

Main Settings
Box Template
Tooltip Template

Main Settings

View:

Site URL:

List name:

Item ID:

Item parent ID:

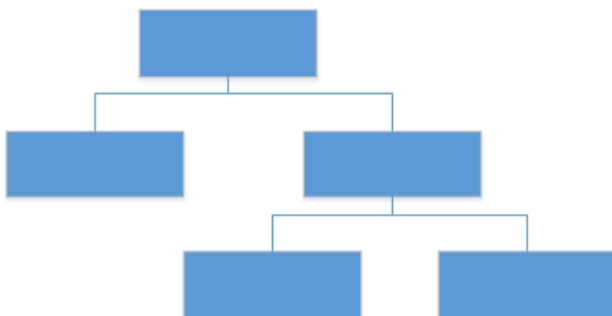
Root ID:

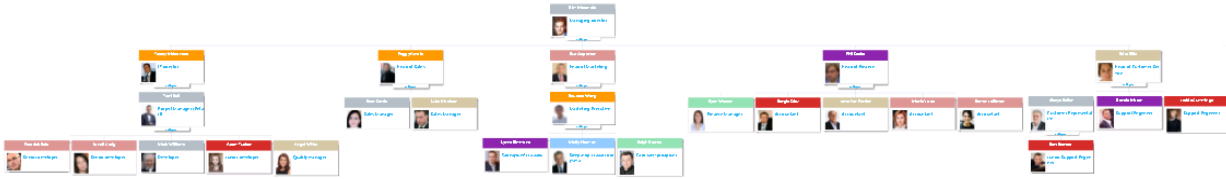
Number of opened tree levels:

ICL Services

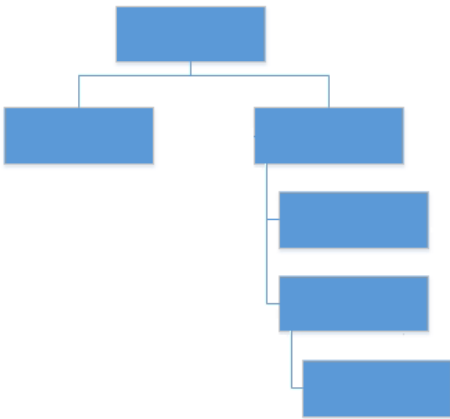
ICL Services Orgchart supports Full and Short forms of **View**.

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





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'.

ICL Services Orgchart visualises SharePoint lists that stores parent-child structures.

Example 1::

cid (Child ID)	Pid (Parent ID)	Name	Position	Department
4	3	Tracey Maldonado	IT Director	IT
5	4	Terri Bell	Project Manager	IT
6	5	Frederik Reikl	Developer	IT
7	5	Adam Tuckler	Senior Developer	IT

CID field contains user id, PID field contains manager ID. CID may be numeric or text value, the only requirement is to make that field values unique.

Example 2 (ForeignList)

cid (Child ID)	Pid (Parent ID)	Name	Position	Department
IT Director	3	Tracey Maldonado	IT Director	IT
Project Manager (Retail)	IT Director	Terri Bell	Project Manager	IT
Developer	Project Manager (Retail)	Frederik Reikl	Developer	IT
Senior Developer	Project Manager (Retail)	Adam Tuckler	Senior Developer	IT

Map 'Item ID' and 'Item parent ID', they are used to build hierarchy. In example above, ItemId=CID and Item Parent ID= PID.

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 (as Cid of IT Director from Example 2) to 'Root Id' to show only IT 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) ▼

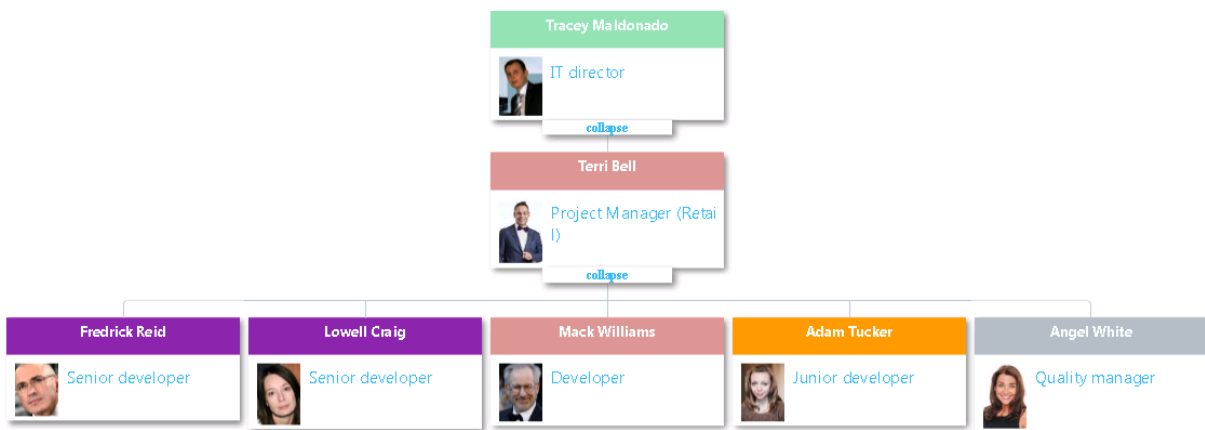
Item parent ID: pid (pid) ▼

Root ID: IT director

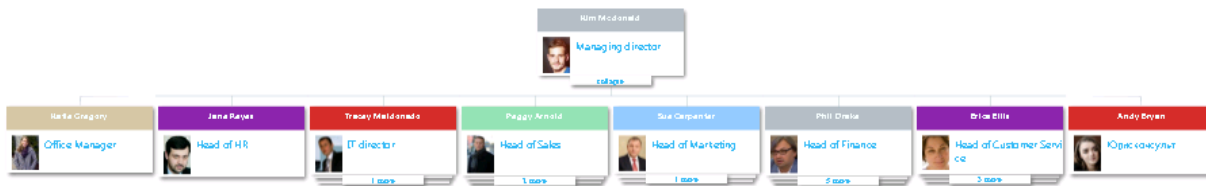
Number of opened tree levels:

Save
Cancel

ICL Services



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:

Item Content:

Item image URI:

Box template:

```
<div id="header">#{Name1}</div><div id="image"></div><div id="content">#{Description}</div>
```

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 the template, you can always return back to default value by clicking **‘Set default’** button.

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

ICL Services Orgchart

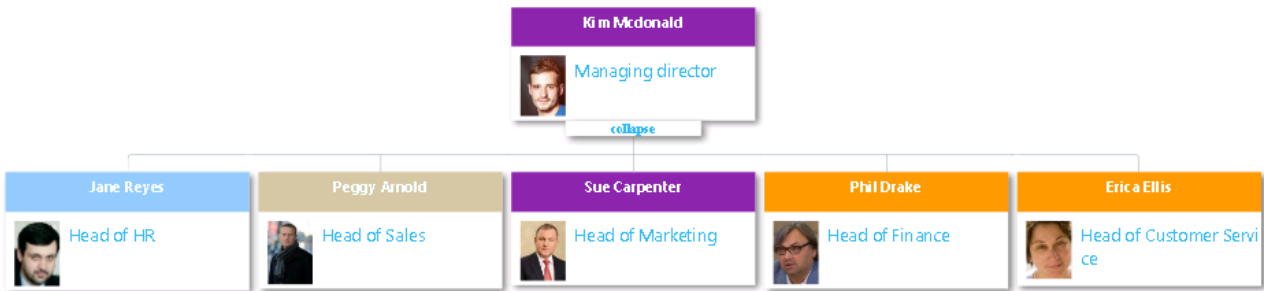
[Edit chart](#)

and buttons resize OrgChart, returns it to original size.

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

[ICL Services Orgchart](#)

[Edit chart](#)



ICL Services Orgchart

[Edit chart](#)

- Jane Reyes

Head of HR
- Peggy Arnold

Head of Sales
- Sue Carpenter

Head of Marketing
- Phil Drake

Head of Finance

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