Create a New Org Chart

Before creating an Org Chart, ensure the manager and direct report fields have been filled out for all users.

This can be carried out manually by People administrators or through a sync (if one is set up on your site)

How to create an org chart

Only users/roles/groups that have been permitted to create charts on the admin side by an administrator can follow the steps below.

1. Open the Org Chart application (Applications > Org Chart)

2. To create an org chart, click the plus icon:
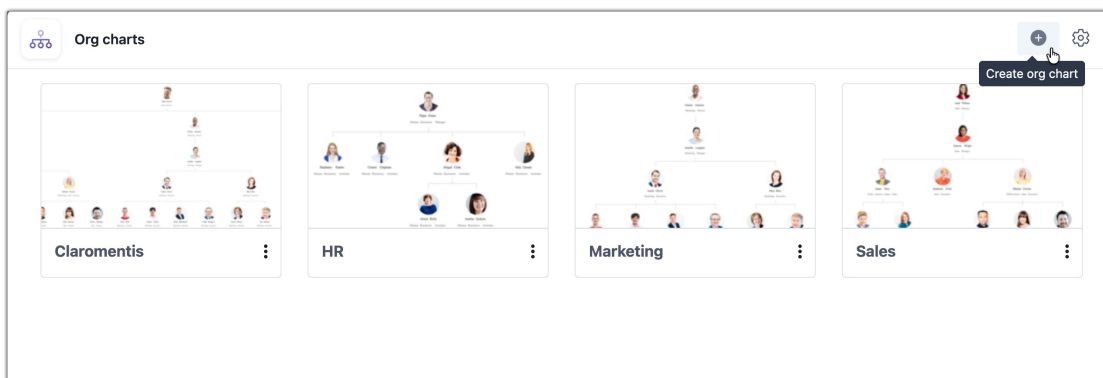
Reminder: If the button is not available, please contact your Intranet administrators so they can give you the appropriate permission.

3. Fill out the details of the Org Chart

- **Title:** Title of org chart (i.e. department, office, company)
- **Web Address:** The org chart URL (this will automatically populate when the title is provided)
- **Head of org chart:** Specify the head of the org chart. All levels and users will fill out based on the structure created across all user profiles.
- **Show person's manager:** Select the checkbox to include the manager of the org chart head or not
- **Depth:** The org chart depth you wish to display users within
- **Excluding users:** Specify any user that should be hidden from the org chart
- **Show disabled users in Org Chart:** Blocked users will appear when set to 'yes'
- **Who can view this Org Chart?:** Enter the appropriate users/roles/groups who should see this chart listed on the front end and be able to interact with it
- **Cover image (optional):** Add an image that represents the org chart

4. Once you are happy with the org chart, select **Save org chart** to publish.

You can also **Preview** the chart before publishing any changes.

How to edit an Org Chart

Only users/roles/groups that have been permitted to create charts on the admin side by an administrator can edit all Org charts and follow the steps below.

1. Head to **Applications > Org Chart**.

2. Click the 3 dots on the chart you wish to edit and select 'Edit'
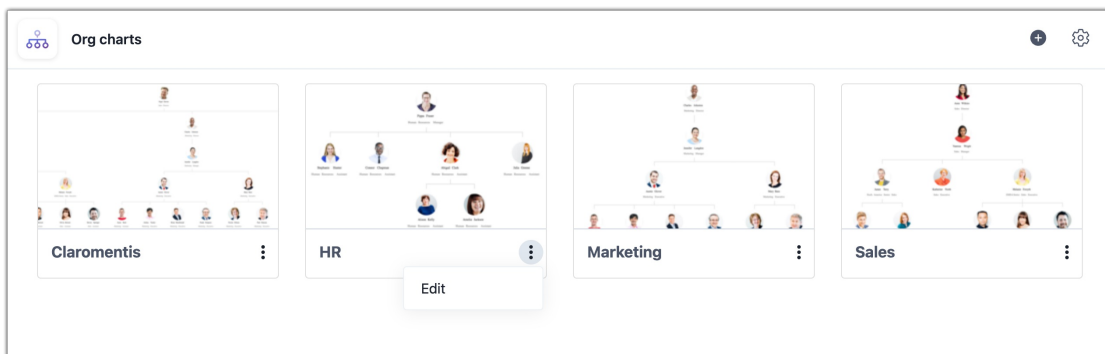
3. The same options given when creating a Chart will appear and can be changed.

Once you have edited the org chart, select **Apply changes** to publish.

If required, you can permanently delete the org chart using the **Delete org chart** button.