Create a New Org Chart

Requirements

Before creating a new Organisational Chart you will ideally have configured your organisation structure correctly. It is not necessarily essential to do this but it makes the process easier.

Please note: If you are syncing the 'Manager' attribute from your Active directory, any changes to direct reports of an individual or their manager must be carried out in your AD. After a sync, these changes will then be applied in Claromentis and any org charts created.

(You cannot change the manager/direct reports in Claromentis as this will be overwritten on the next sync).
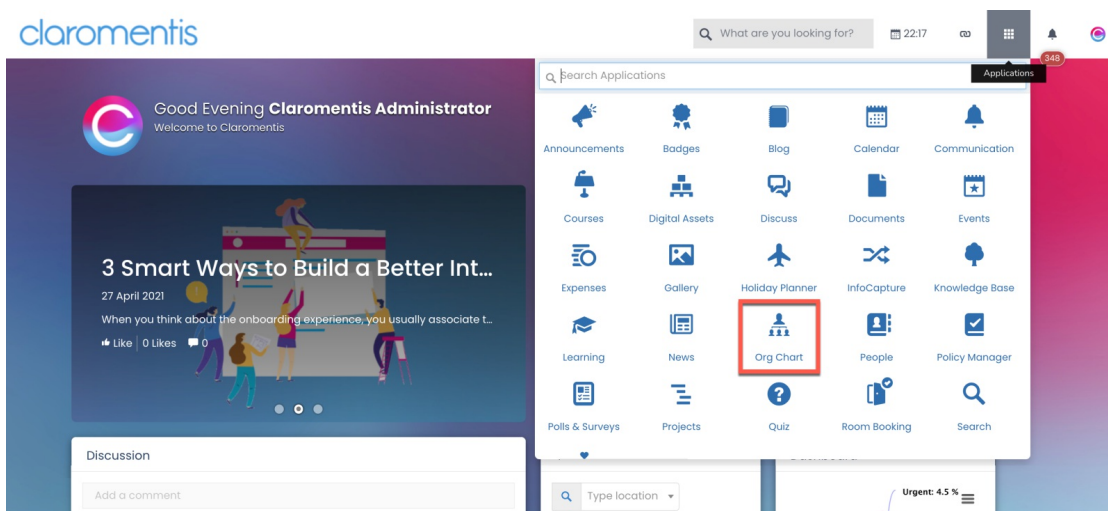
Org chart permissions

To create an org chart, you will need to be granted permission to create & edit org charts first.

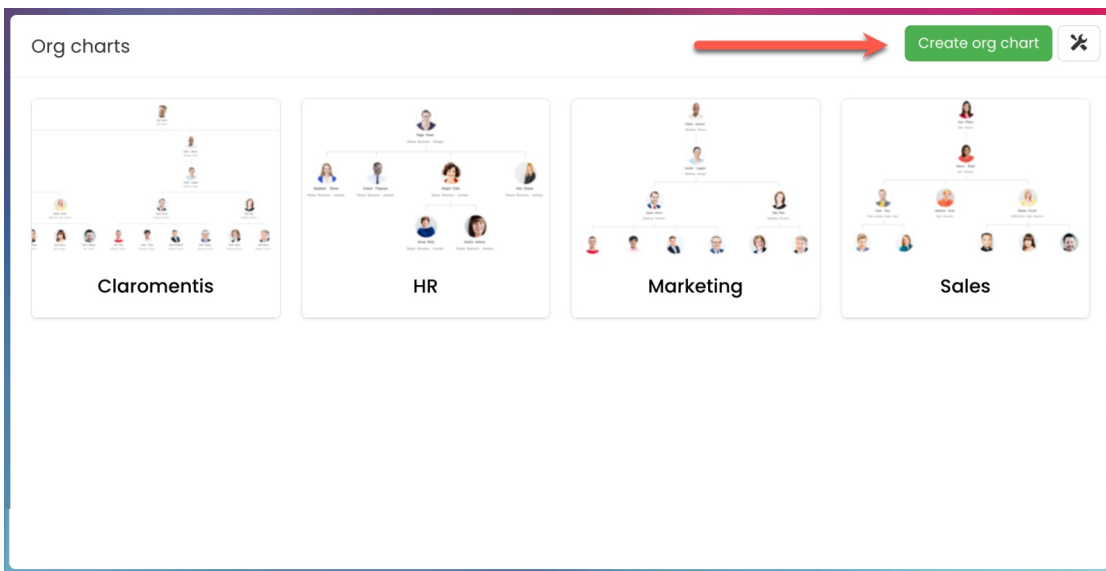For more information on how to assign org chart permissions, click here.

How to create an org chart

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

When you access the org chart application you will be presented with all org charts that you have permission to view.

2. To create an org chart, click **Create org chart**.

Reminder: If the button is not available, please contact your Org Chart admin to grant permissions.

3. Next, you will be taken to the creation page allowing you to add a new chart representing your organisation structure.

- **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. By doing so will define the structure of the org chart providing you have already put this in place.
- **Show person's manager:** Tick checkbox to show the manager of the org chart head
- **Depth:** The org chart depth. Anyone who directly reports to the head of the org chart will be placed on the level lower of the chart and will continue to proceed to the chart until the level you have defined
- **Excluding users:** Specify any user that should be hidden from the org chart
- **View org chart:** Assign permission to view the org chart. There are no advanced permissions, this is simply to define view rights. Edit rights are set through the admin panel.
- **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

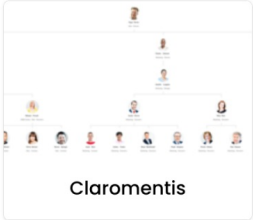1. Head to **Applications > Org Chart**.

2. Hover your mouse over the org chart you wish to edit and click the **Edit** (pencil) icon.
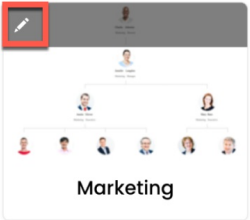

3. Once you have edited the org chart, select **Apply changes** to publish.

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

Last modified on 1 December 2023 by Hannah Door

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