Practical examples: Organizational chart

About the organizational chart

The **organizational chart** maps the division of a client into its organizational structures. It therefore provides a graphical overview of the hierarchical structures and an overview of how they relate to each other. As the organizational chart only shows hierarchical structures, loose groups, project groups and cost centers are not displayed here.

With the help of some parameters, either only groups or groups with the correspondingly assigned employees can be displayed when building the organizational chart. In addition, you can search for specific roles in the organizational chart. The departments are then displayed with the desired role holders, such as assigned superiors or department heads.

Hierarchical groups that have not yet been assigned a parent group are displayed in a different color. This makes them recognizable at a glance, and they can then be placed in the desired position directly via the organizational chart.

From the user's point of view, the organizational chart plays a significant role when calling up certain information lists (e.g. management lists) or when querying the attendance board, etc.
Based on the view permission, Webdesk takes into account which parts of the organizational chart (groups) may be evaluated and which organizational units the employee may view. Groups for which there is no view permission cannot be selected in the organizational chart. You can find more details on this under Action management.

Initial setup of the organizational chart

When setting up the organizational chart for the first time, a "**top group**" should first be defined under the **organizational structures** (for example the org structure "Organizational chart").
To do this, activate the checkbox for the corresponding group, then click "Save" or "Save & Close".
The organizational chart can then be built.

In the **newly created** organizational chart you initially see only one group (the **top group** defined in the organizational structure); all other groups are shown in pink and are located above the top group. These are not displayed in the organizational chart and cannot be queried by the user in Webdesk.
To assign these groups to the correct positions > see "Editing groups" below.

Starting the organizational chart

- **Start**
  The organizational chart is displayed with the selected parameters
- **Hide search mask**
  The selection box can be hidden, thus providing more space for the results overview.
- **Client**
  Selection of the client
- **Date**
  The organizational chart is displayed as of the key date; the calendar function serves as an aid
- **Show employees**
  Selection Yes / No:
  - Parameter **Yes**: the employees of the respective department are displayed
  - Parameter **No**: the overview shows only the departments
- **Search terms**
  Targeted search for a search term (name); the search results are highlighted in yellow, and you can jump to the next search result with the Tab key

- **Consider deputy suppression**
  If this parameter is activated, the organizational chart query also checks whether the employee has activated their deputy or not
- **Roles**
  The organizational chart shows the role assignment for the groups and optionally also for the persons (the parameter Show employees must be set to Yes)
- **Start**
  The corresponding organizational chart is created and displayed:

The organizational chart shows the name of the department and the associated employees.
Clicking the plus symbol expands a subtree; clicking the minus symbol collapses a subtree.
The right-hand column shows the role holder responsible for the respective employee or group (including deputy, if any).

Editing the groups

To insert groups that have not yet been assigned into the organizational chart structure (company hierarchy), proceed as follows:

- Select the desired group with a right mouse click > a context menu appears (Edit group, Cut group, Paste group, Insert person)
- Click "Cut group"
- Right-click at the desired position and select "Paste group"
- The order of the groups is saved automatically by the system.
- **Edit group**
  Clicking the menu item Edit group takes you to the detail view of the selected group. From there you can make the desired changes.
- **Cut group**
  This cuts the group out of the organizational chart
- **Paste group**
  The cut group is pasted back into the organizational chart at the selected position
- **Insert person**
  To add a person to a group, you must first cut them out of the organizational chart (see the item Cut person)

NOTIZ

Assigning groups as subordinate groups to groups that are not yet part of the organizational chart: if you assign a group (as a subgroup) to a group that is not yet in the organizational chart > it initially does not appear in the organizational chart. This subgroup only becomes visible again once the parent group is inserted into the organizational chart.

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Name	Wert
Modul	Portal & Organisation (po)
Webdesk Actionname	po_editOrgStructure
Artefakt-Typ	Action