

## Organization (Automated Chart)

17-Jan-2024 | Siri Benedicte Dahle



## Automated organization charts

Generate organization charts in seconds. Select a top-level (position) that the chart is being generated from. The system will automatically generate and draw an organizational chart showing the hierarchy of the chart.

**Note!** Organization charts is populated based on registered positions. Positions needs to be setup in advance of the chart.

Read more about positions [here](#)

## Organization chart register

Locate **Organization Charts** by searching in the open field of your menu. This will direct you the register that contains all the organization charts in the system.

PES Project

Organization Charts

PES Departments

PES Developers

New Chart test

Test Benedicte

Contracts Deparement

AkerBP Pims

test33

Project Albel

Organization Charts

+ Create New

Q Preview

***	Domain Name	Title	↑	Description	Inactive	Category	App
	Q	Q		Q	<input type="checkbox"/>	Q	Q
	PES Project	AkerBP Pims	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
	PES Project	Contracts Deparement	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
	PES Project	New Chart test	<input checked="" type="checkbox"/>	YES	<input type="checkbox"/>	W	
	PES Project	PES Departments	<input checked="" type="checkbox"/>		<input type="checkbox"/>		28/
	PES Project	PES Developers	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
	PES Project	Project Albel	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
	PES Project	Test Benedicte	<input checked="" type="checkbox"/>	Hello	<input type="checkbox"/>	Category red	
	PES Project	test33	<input checked="" type="checkbox"/>	asdasd	<input type="checkbox"/>		

Open a chart by clicking on Organization Chart [Title](#) link highlighted in blue in the grid or click on blue links

>

PES Departments

PES Developers

New Chart test

Test Benedicte

Contracts Deparetment

Organization Charts

+ Create New

Preview

Domain Name	Title	Description
PES Project	AkerBP Pims	
PES Project	Contracts Department	

Create a new chart

Click on + Create New

Organization Charts

+ Create New

Preview

Domain Name	Title	Description	Inactive	Category
PES Project	AkerBP Pims		<input type="checkbox"/>	
PES Project	Contracts Department		<input type="checkbox"/>	
PES Project	New Chart test	YES	<input type="checkbox"/>	W
PES Project	PES Departments		<input type="checkbox"/>	

Select **Domain**, **Title** and the **Top Position**. Click Create

The organization chart will then automatically generated based on the **selected Top Position**.

*The selected Top Position sets the hierarchy of the chart that is being generated.*

**Note !** The Level of details the organization card hold is based on registered details created in [position](#) and [person](#)

- The **Arrow** will direct you back to the Reporting Position.

- The **three dots** is a menu for E-Mailing options.

- *Additional Links and color styling on single cards are added in Card settings.*

Read more under the **Edit Card setting** section.

PES Project

PES Document

Benedicte Dahle

Omega AS

PES

Lic

(no

Send E-m

Send E-m

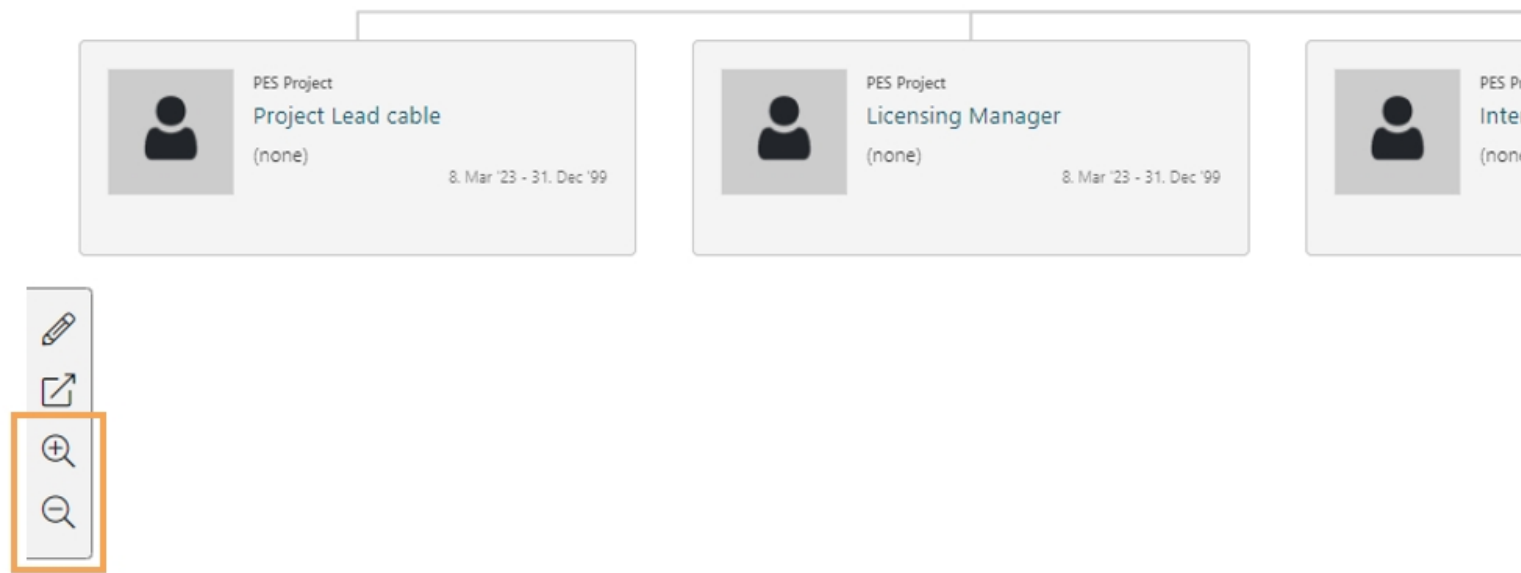
Copy E-m

Copy E-m

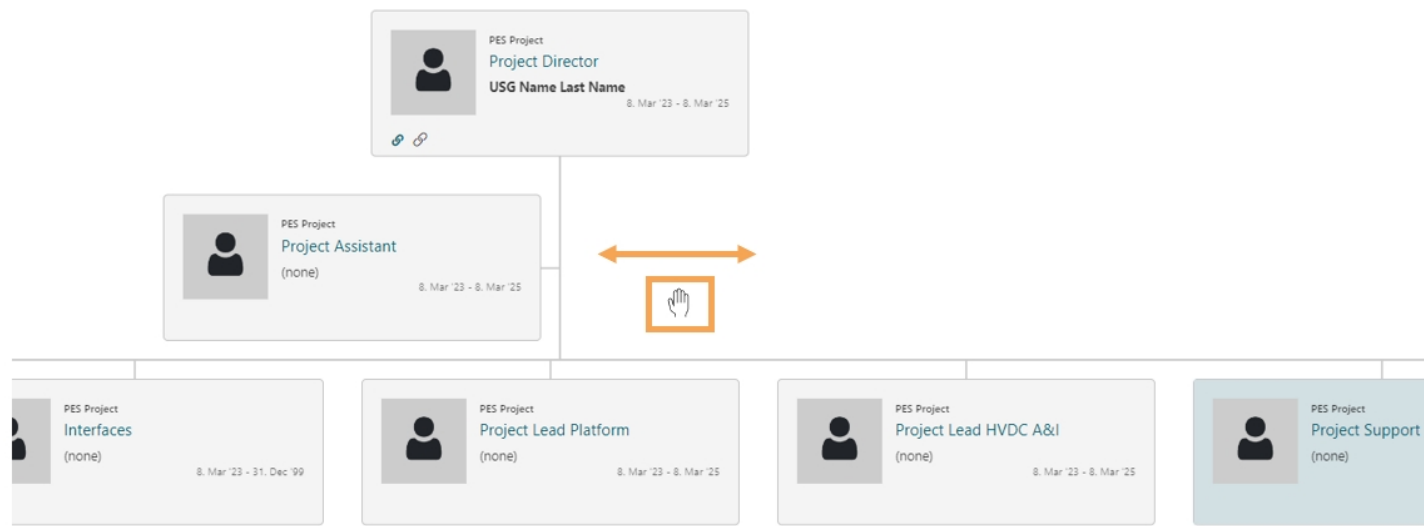
2 of 16

# Navigation

To Zoom in and out you can use mouse **Scroll** or click on the + an - icons located at right side.



To navigate horizontal - click in the view with your mouse and drag.

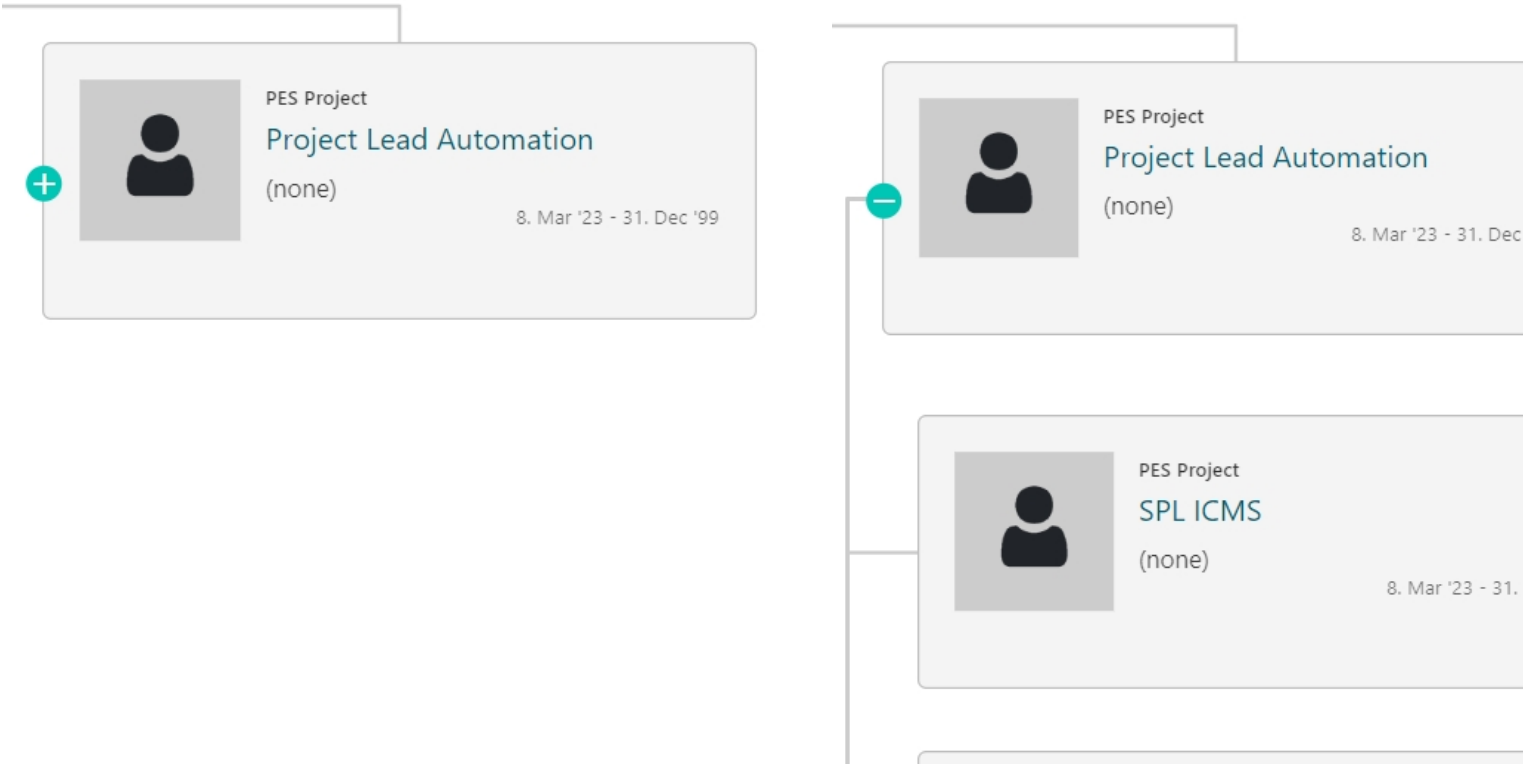


# Navigation Levels

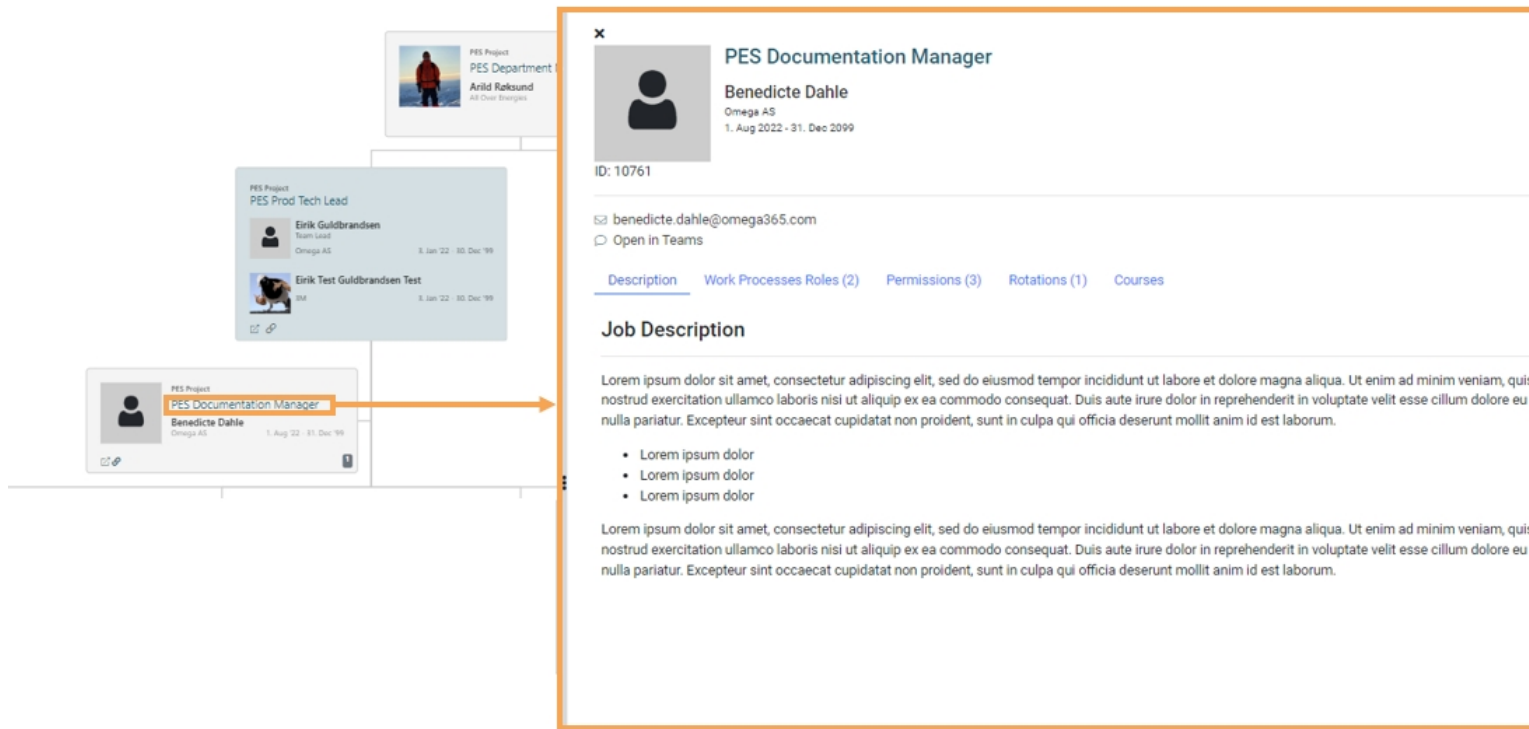
When you click directly on a card , the view will change and set the focus the selected card and its level. To g  
**Position** click the arrow.




Expand the level by clicking on the ( + ) symbol of the card and decrease the level view with the ( - ) When y  
is changed to show the current level of the chart.



To view more detailed information, click on the **Position Link** on the card.



A side panel with Position / Card details will appear.

**Note!** The side panel window is flexible. Click on the  and drag to expand/decrease the sidepanel view

The top section of the side panel holds key details and contact details.

- Click on "**Position Title**" to be directed to **Position details**.
- Click on "**Name**" to be directed to **Persons details**.

## Position Details - tabs

Below the contact section there are tabs that hold further information. The tabs have counts that is showing a tab.

Description   Work Processes Roles (2)   Permissions (3)   Rotations (1)   Courses

Role	Scope
SJA Contributor	PES Project
SJA Originator	PES Project

- **Description:** Job description for Position ( **Note!** Description tab will only show if details exists. )
- **Work Process Roles :** Lists Work Process Roles. Work Process role nominates workflow signatures.

- **Permissions:** Lists Permission roles for different modules in Pims.
- **Rotations:** If the Position is registered with a rotation, rotation details will show here.
- **Courses:** Lists courses on selected position and the course status.

**Note!** Administration of these settings is in [Position details](#). You can easily get directed to this view by clicking on the Position details link, which will direct you to the selected Position detail view.

## Compare Menu

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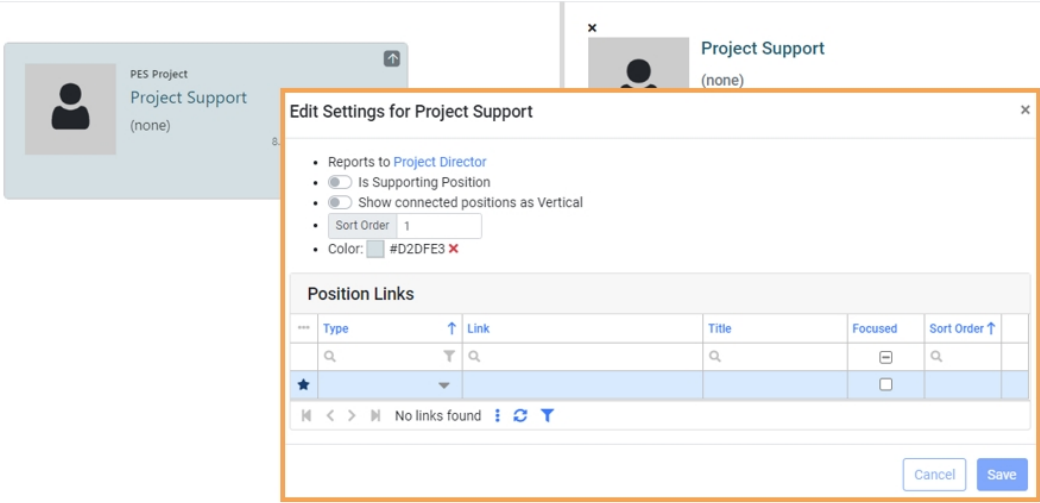
In the detail view you have the option to compare what the selected user has access to compared to you, or another user. Click on the compare menu link.

This will direct you to the Compare Menu page, where you can compare menu access to other users.



Edit (Settings and Links)

Click on **edit icon** located at the top right corner off the sidepanel.

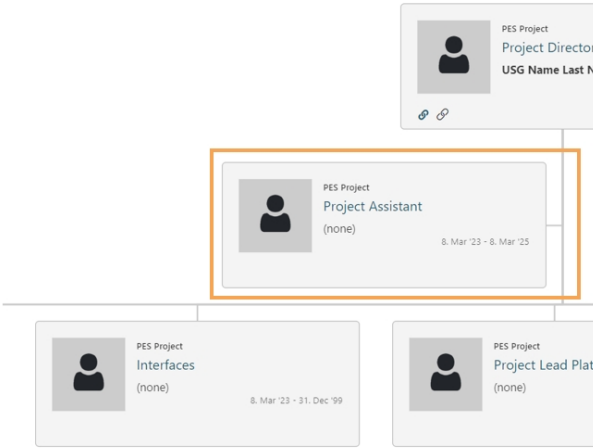


In this window you administrate settings for the selected card.

Settings:

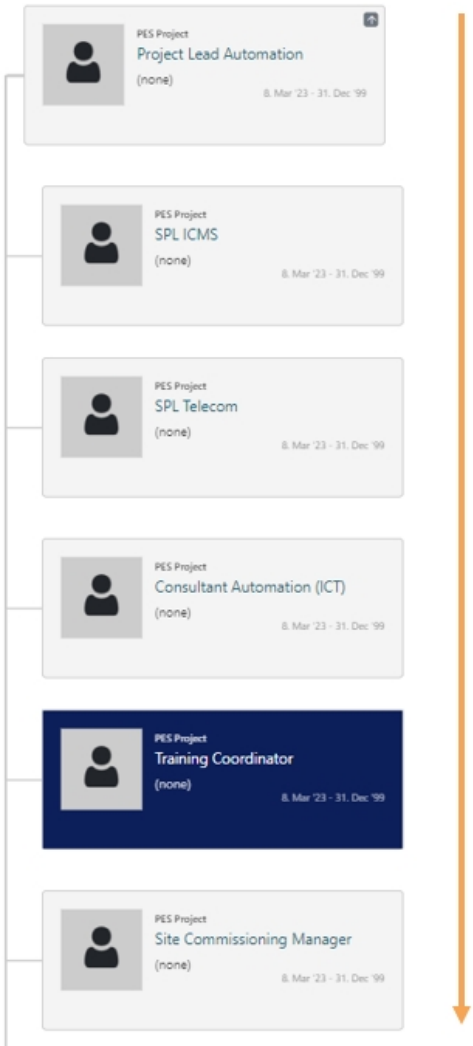
Reports to ( [Link to reporting Position](#) ) Settings for reporting position is administrated in Position details.

By activating "**Is Supporting Position**" the card will be re-structured/ re-drawn to show as a supporting Position in the main chart.

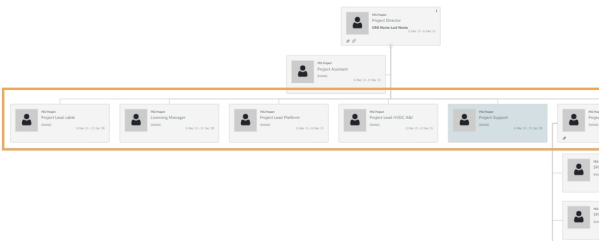




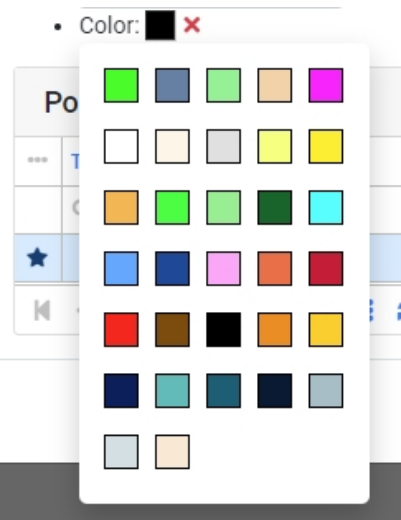
By activating **Show connected positions as vertical** you will change the selected and connected positions to be shown vertically in the chart.



Sort Order. Option to sort the order of card that are shown in the **selected level**.



Select Color from list. Add or edit colors to this list in [Default Colors](#). Clear the color by clicking **x**.



Click in the grid to add Links to the selected card.

## Edit Settings for Project Lead Automation

×

- Reports to [Project Director](#)
- ☐ Is Supporting Position
- ☒ Show connected positions as Vertical
- Sort Order
- Color: ■ ✕

### Position Links

Type	Link	Title	Focused	Sort Order
Internal	<a href="https://omega365.com/inside">https://omega365.com/inside</a>		<input checked="" type="checkbox"/>	1



PES Project

Project Lead Automation

(none)

8. Mar '23 - 31. Dec '99



**Type:** Select Type (Internal or External)

**Link:** Insert URL Link

**Title:** Optional

**Focused:** Link icon will show in bold on the card.

**Sort Order:** Option to select order of links (if multiple link)

## Edit Organizational settings

Click on the pencil icon to edit settings.

This is the setting for the organization chart. Use the slide of the default scale to adjust the default view of the organization chart. This pop-up box is movable, click on the top section to move the box and view settings adjustments. To show location / department color activate the switches. Click Save.

Edit Mode (Create multiple positions and connect positions)

To enable edit mode, activate the switch in organization chart setting. (see image above) Close the window for

☒ Enable Edit Mode

When enable mode is activated an icon will appear when you are hovering over a position.

Click on the pen icon, a new pop-up window will appear where you can manage the connected positions (renew) or create new position(s) that is reporting to the selected position.



**Note !** This function is useful to easily create new positions and connect positions within the organization

**Add new reporting positions:** Click Create an connect . Add details and click create Postion, the Reporting to

**Create multiple:** Click batch to create multiple postions that is reporting to existing position.

## Create Position

Domain

PES Project

Title

J: Project support

From

dd/mm/yy



To - Optional

dd/mm/yy



Reporting to Position

J: Project Control

☐ Disable inheritance ?

Create Batch

Cancel

Create Position

Chart details and Level settings

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In chart details you add more information to the chart and administrate chart **Level settings**.


To add a new Level click in the Title column next to the star icon.


**Title:** Add Level Title


**Position Title:** Select Position from drop down list


Set Chart as Public

Activate the switch in Chart details to set a chart as public. This allows charts to be organization-wide/meaningful chart.

 Save

 Cancel

 Delete

 Open

Domain

PES Project

Title

USG Project Group

Description

Category

Levels To Show

6

Default Scale

1.2


☐ Show location color

☐ Show department color

Responsible

☒ Is Public

Print chart

 Print Click on **Print icon** located in the top right corner. A pdf will be generated and uploaded to your co