

KWizCom Corporation

# **Org. Chart App**

**User Guide**

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## INTRODUCTION

### GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product Overview
- Installation Guide
- Administration Guide

## PRODUCT OVERVIEW

Org. Chart app is part of [KWizCom Data View Toolset for SharePoint Online](#)

The KWizCom Org. Chart App is a SharePoint client-side web part, utilizing the new SharePoint Framework (SPFx), that displays organization chart based on multiple sources: SharePoint lists, Excel files and Azure AD (using MS Graph API).

The retrieved items are displayed using super-flexible, “Lego-style” controls, including Org. Chart controls, custom menus and configurable filters.

## KEY FEATURES

Feature	KWizCom Aggregator App	
	STD.	PRO.
SharePoint list data source	√	√
Excel file data source	√	√
SPFx responsive display controls: Org. Charts, Persona card, Table, Global actions	√	√
Deeper customizations available by using CSS and knockout	√	√
Export to CSV	√	√
MS Graph API data source		√
SharePoint list aggregation data source		√
Configurable filters		√
Conditional formatting		√
“Assistant” employee type		√
Multiple parents Support for employees that have more than one manager to whom they report.		√

## INSTALLATION

### SOFTWARE REQUIREMENTS

#### SERVER REQUIREMENTS

- SharePoint online (Office 365)
- SPFx version 1.5 or later

#### CLIENT REQUIREMENTS

- Windows 10+
- Microsoft Edge/Internet Explorer, Mozilla Firefox, Google Chrome – all latest version

### INSTALLATION PROCEDURE

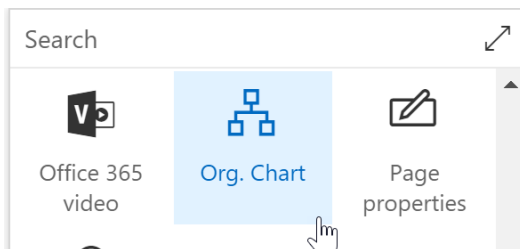
Please refer to installation instruction on KWizCom's website:

<http://www.kwizcom.com/sharepoint-apps/org-chart/download/>

## ADMINISTRATION GUIDE

### ADDING THE ORG. CHART WEB PART TO YOUR PAGE

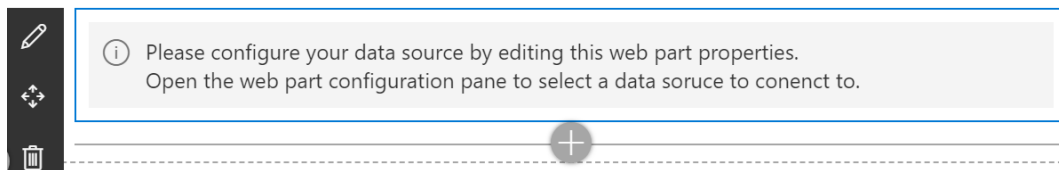
Org. Chart web part is part of KWizCom Data View Tools. After you install the package according to installation instructions, you will see the following web part in the gallery:



Click "Org. Chart" to add the Org. Chart web part to your page.

### ORG. CHART WEB PART DATA SOURCE CONFIGURATION

To configure the web part, edit the web part settings:



You will see the web part's toolpane:

Org. Chart
✕

Select data source

Data source type:

Customizations

Custom CSS file:

Specify path to a custom CSS file.

Persistent cache

Keep persistent cache for:

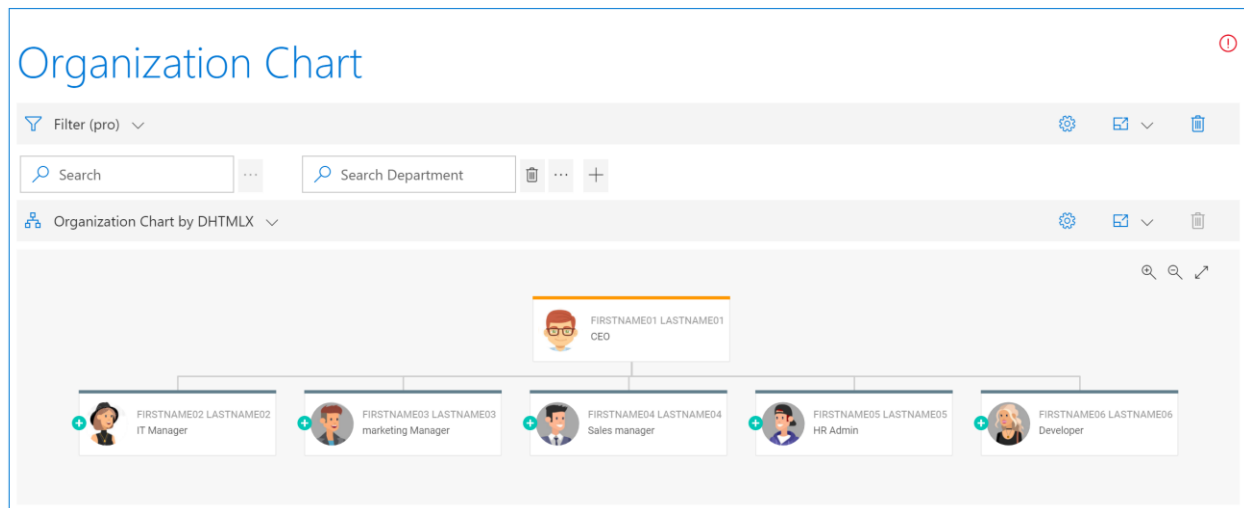
Nine hours
▼

Property	Description
Data source type*	Select to which of the data types you wish to connect the web part. According to the selected type, the relevant properties will appear.
Custom CSS file	You can override various styles by providing your own CSS file url.
Keep persistent cache for	The web part caches requests that take longer than others to enhance the web part performance.

\*To learn about each data source’s configuration settings, please review the [Data View Plus User Guide](#).

## ORG. CHART WEB PART DISPLAY CONFIGURATION

After you connect the web part to a data source you will see the following default display:



As you can see, this display includes the following controls:

- **Filter control (requires Pro edition)**  
includes configurable filters that allow you to easily find employees according to various properties.



- Org. Chart control

The web part includes several Org. chart controls, enabling you to choose the one that suits your needs.

All these are just default settings.

You can fully customize the display by configuring these controls and other controls, which are available with the Org. Chart web part.

To learn how to use the template designer to configure each of the available controls, please review the [Data View Plus user guide](#).