Org Chart App

Org Chart App provides the ability to represent relations between the board items in interactive, dynamic, and collaborative org chart view.

The Org Chart board view allows you to show your team's reporting or general items relation in one place, change existing connections or establish new relations just in a few simple clicks.
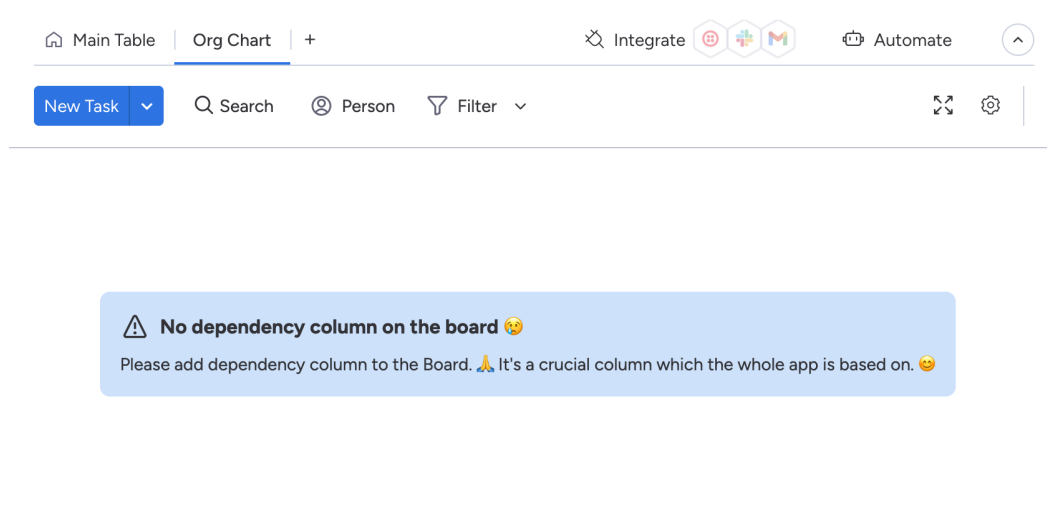
Key Features

- Hierarchical Clarity
  - Clearly define relations between your board items, reducing confusion and streamlining decision-making processes.
- Drag-and-Drop Interface
  - Rearrange board items or change their relations using a simple drag-and-drop interface.
- Sharing Functionality
  - As a board member, configure your own Org Chat view with the ability to share it with other board members.
- Customizable Item Details View
  - Easily define what item details to display in a separate item details modal view or completely disable this view if needed.
- Real-Time Updates
  - Changes in board items relations are reflected in real time, ensuring that your org chart is always accurate and up to date. Fast edit of the board item details is available as well.
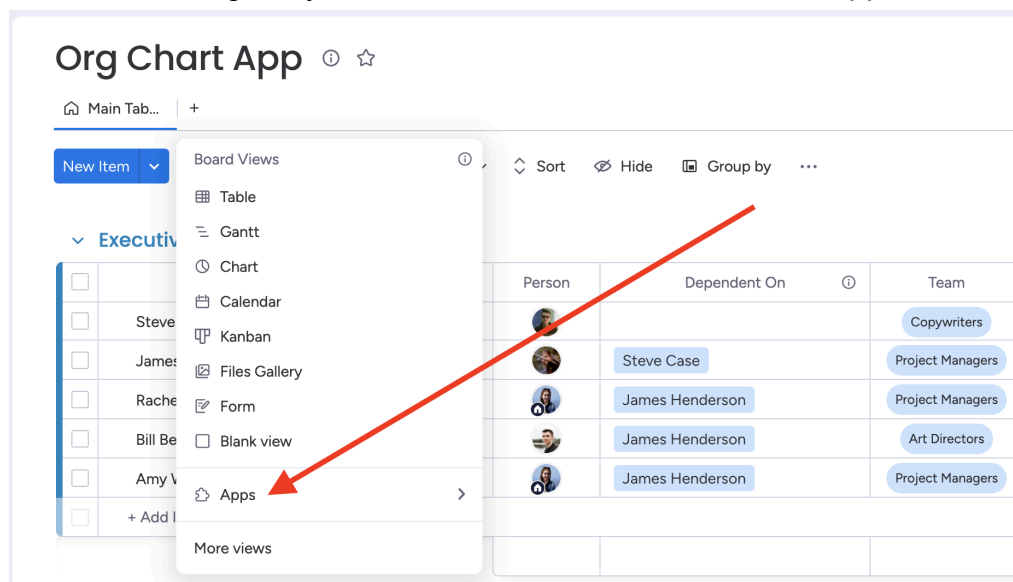
Quick Start

Prerequisites

1. In order for Org Chart App to establish board items connections, it's a must to have a Dependency column configured on the board. Otherwise, the following error would be shown in Org Chart board view instead of your board items relations
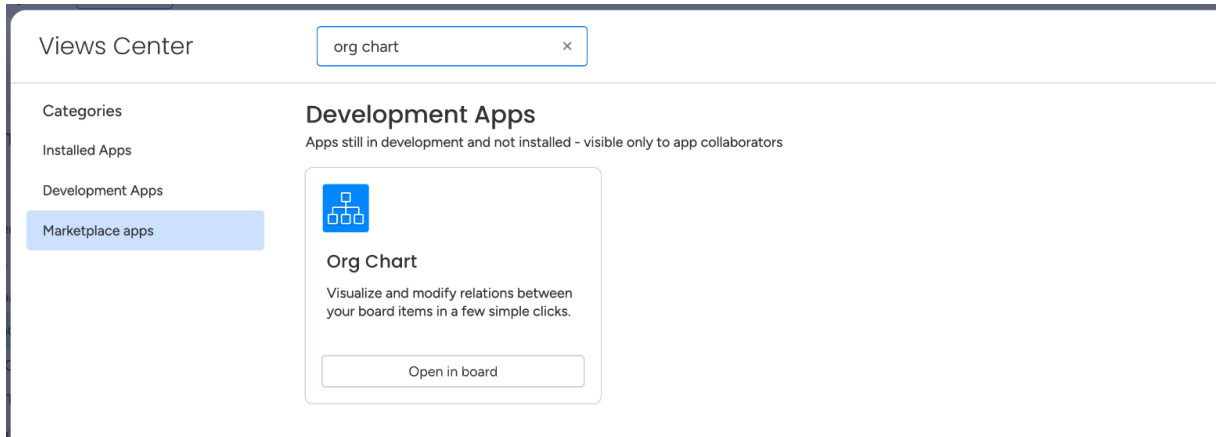

Installation

1. Install Org Chart app from monday.com apps marketplace.
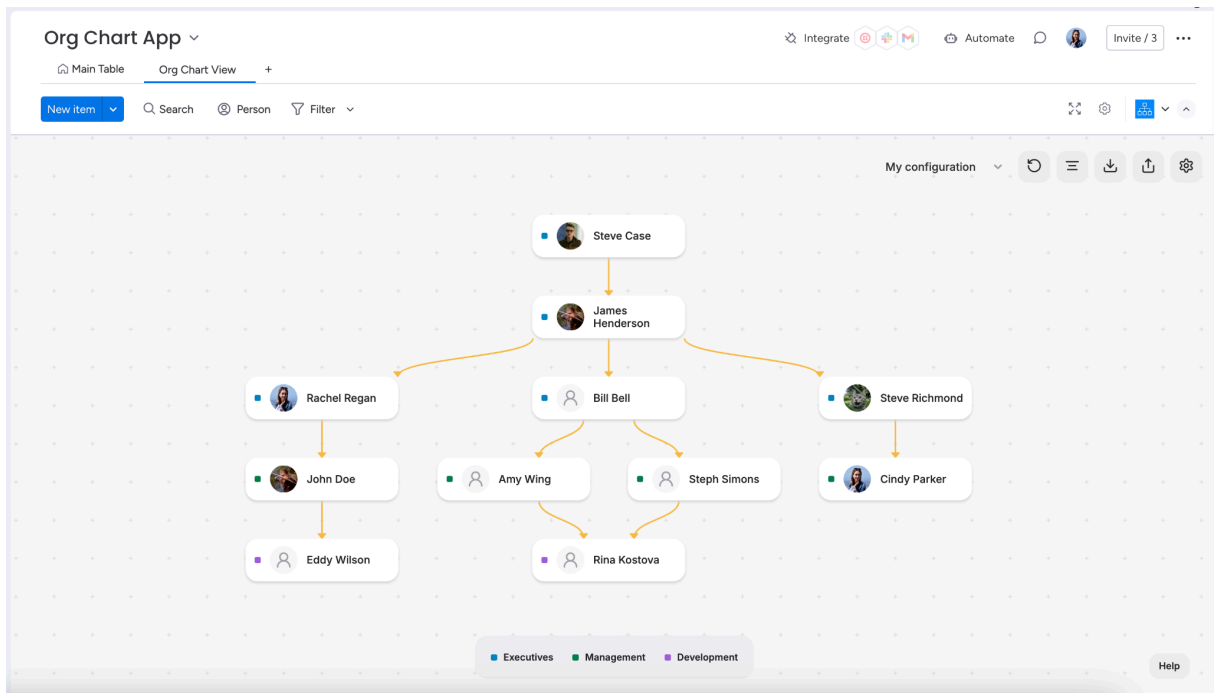2. Once installed, go to your board and click on Add View -> Apps.

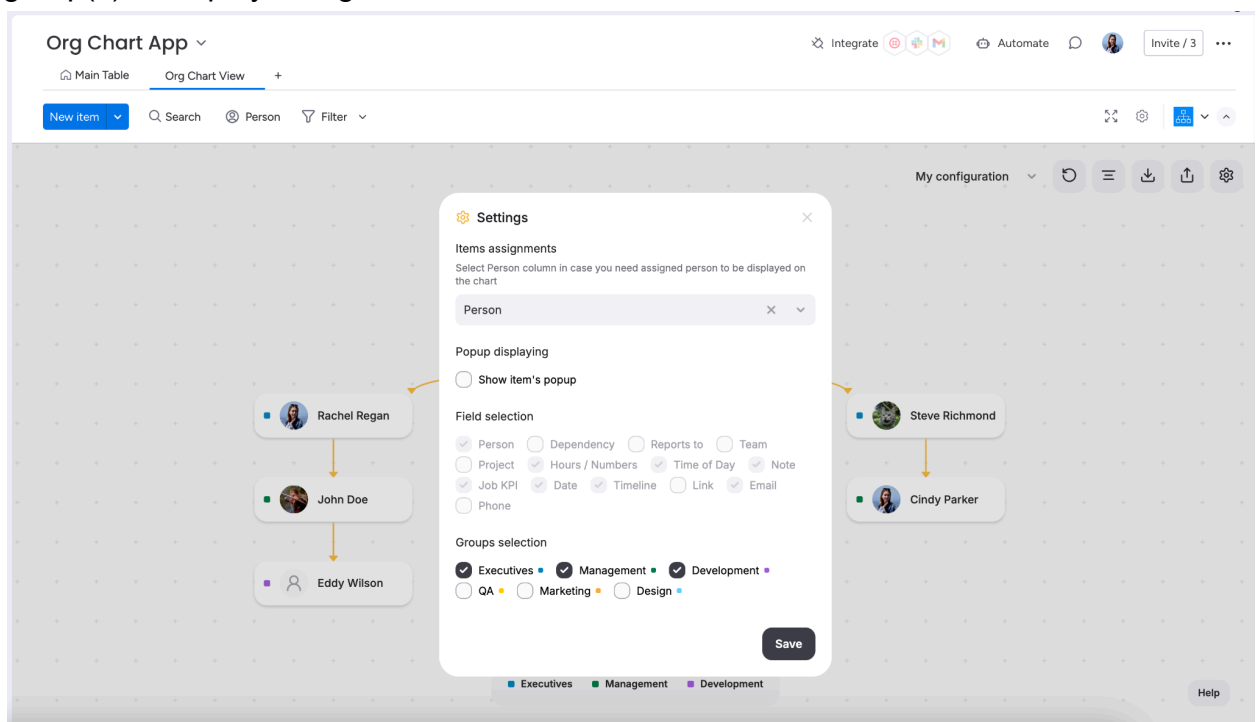3. Search for 'Org Chart' app and click on 'Open in board' button.

4. That's all! Now all connections established in Dependency column are visualized in your org chart view.

First-time Use

1. Open 'Org Chart' custom board view added above having all the board items displayed in accordance with dependencies configured on the Main Table.
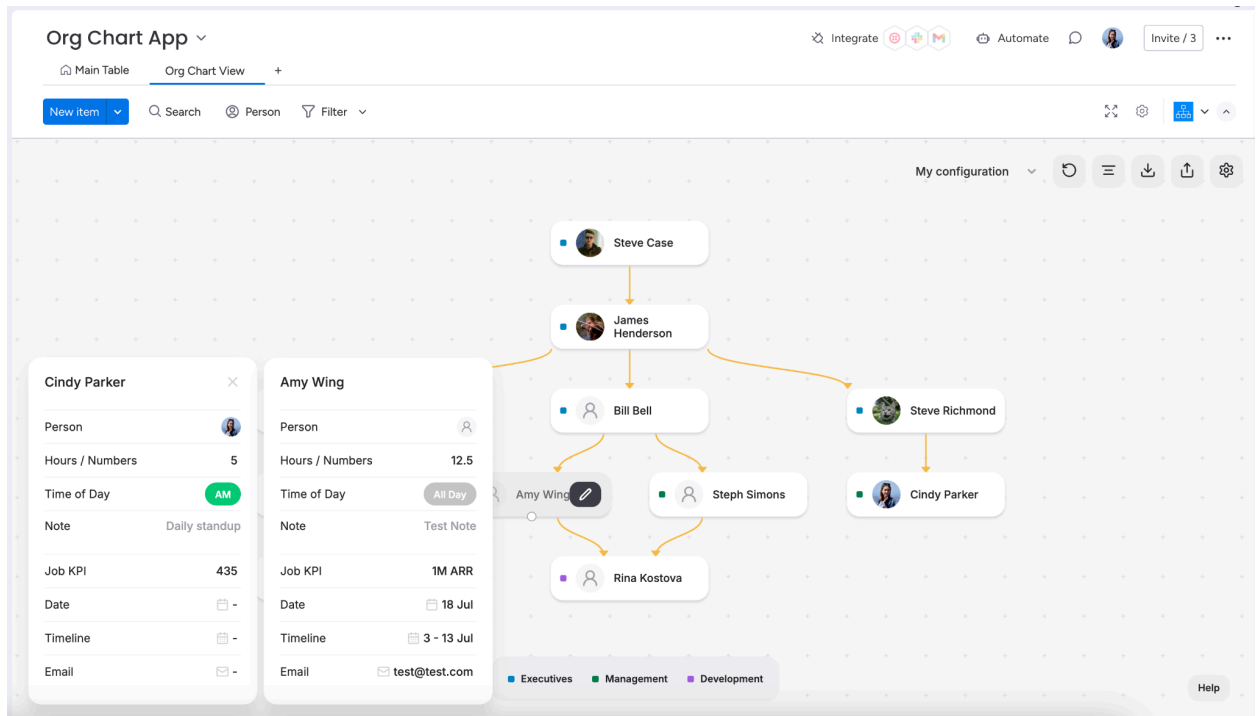
2. To rearrange items, just click on the item, drag to the desired place and drop it.
3. In order to establish a new connection, click on the item bottom area and drag the arrow to the desired item.
   a. When a connection is added or removed, an arrow might be shown in a dark color for a few seconds which means that the request to create/delete a connection is in progress. Important not to leave the org chart view until the arrow changes color to yellow, otherwise the connection will not be established. Also, the notification message about connection successful creation or deletion would be shown.
4. To remove the existing connection, just click on the cross button displayed over the arrow.
5. In order to display an assigned person on the item tile, select the appropriate People column in the Settings menu.
6. There is a possibility to control items displaying by group(s) selection. Use the 'Group Selection' option in the Settings menu to configure what items from what group(s) to display in org chart view.
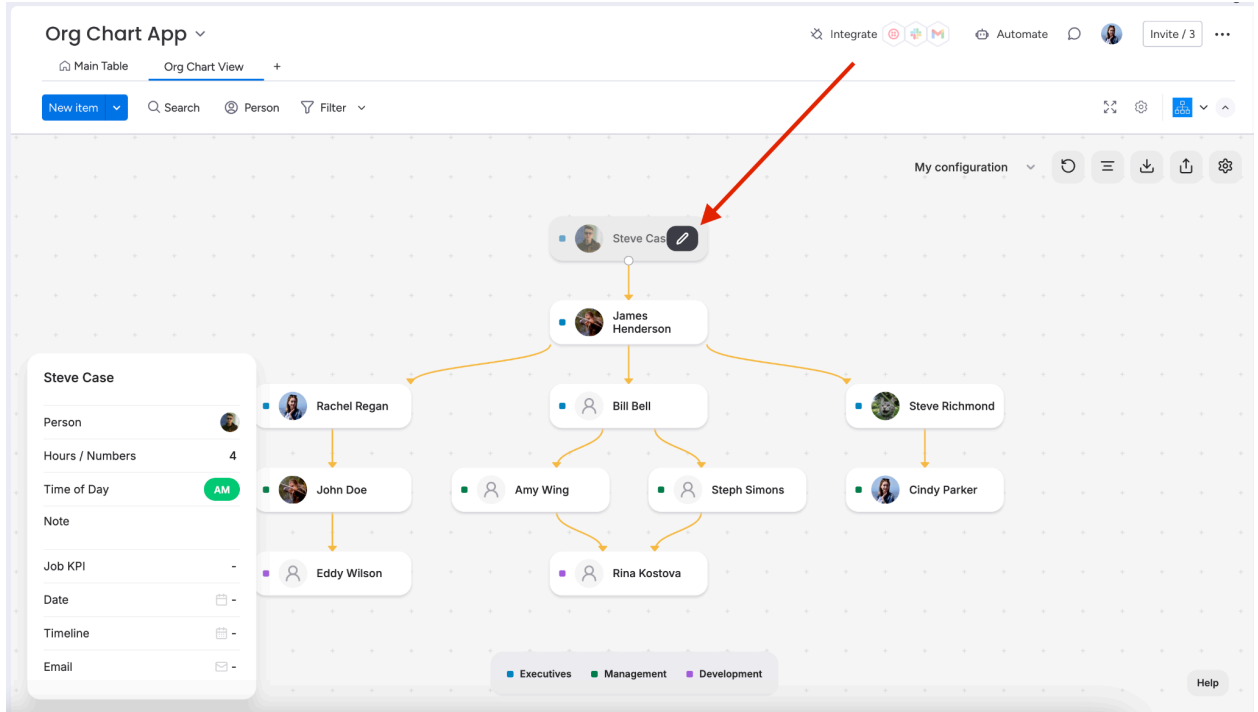

7. Hovering over the item tile will open the item details popup in the left sidebar area. Clicking on the item will put the popup in the fixed position until a user closes the popup by clicking the cross button or opens another popup by clicking on another item
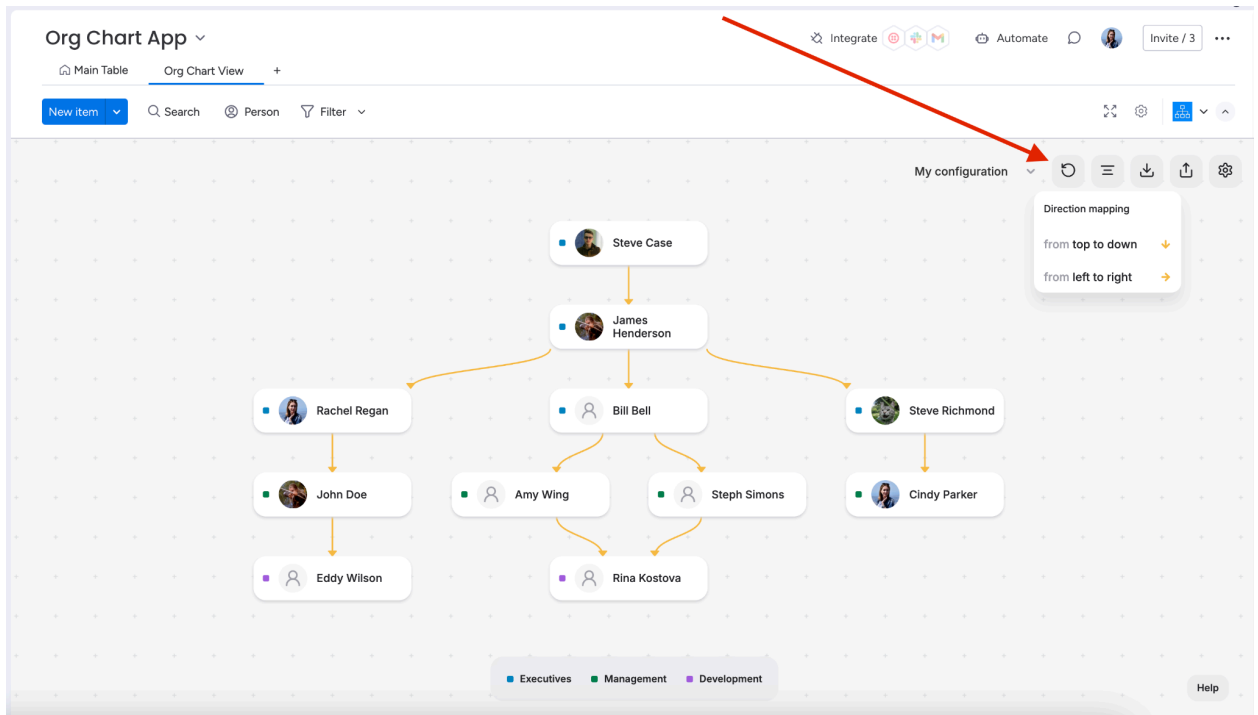
a. If the user has an item details popup opened in a fixed position and hover over another item, a second popup will be shown giving the ability to compare details of two selected items.

8. Items details popup displaying is controlled by the 'Show item's popup' option in the Settings menu.
9. Columns displaying in the item details popup are fully configurable through the Settings menu too.
10. Important! - items details popup is opened in read-only mode, no info can be changed in this modal view.
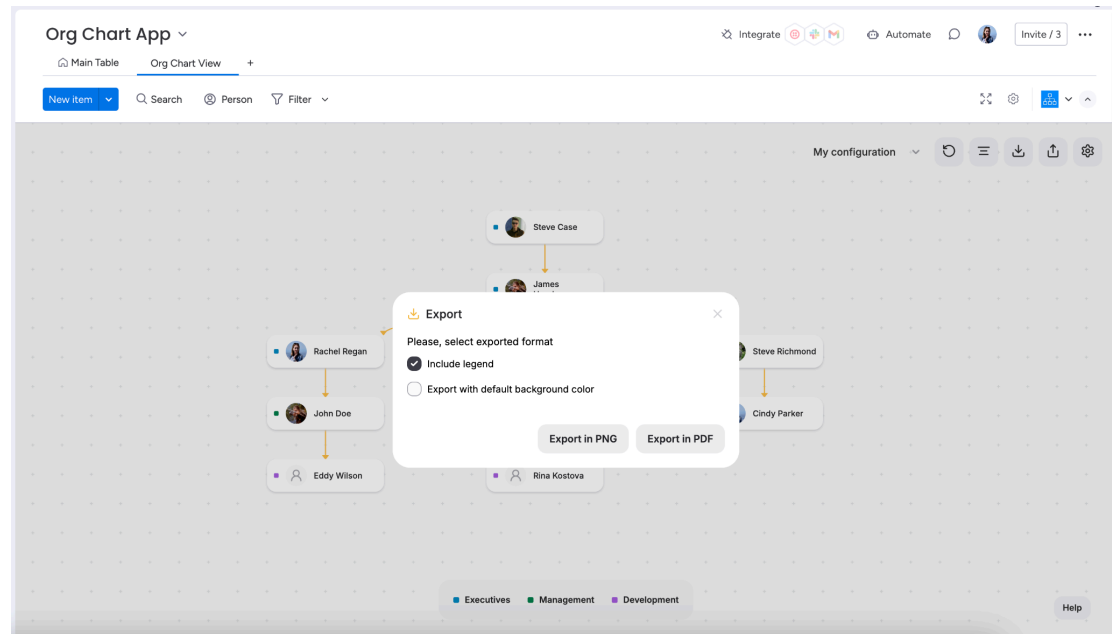

11. In order to edit item details directly in the Org Chart view, there is the Edit button appearing on hover on each item's tile.

12. To change the Org Chart direction from horizontal to vertical or vice versa, use 'Align Items' control represented in the top right corner. To centralize the chart, 'Center the chart' control can be used as well.
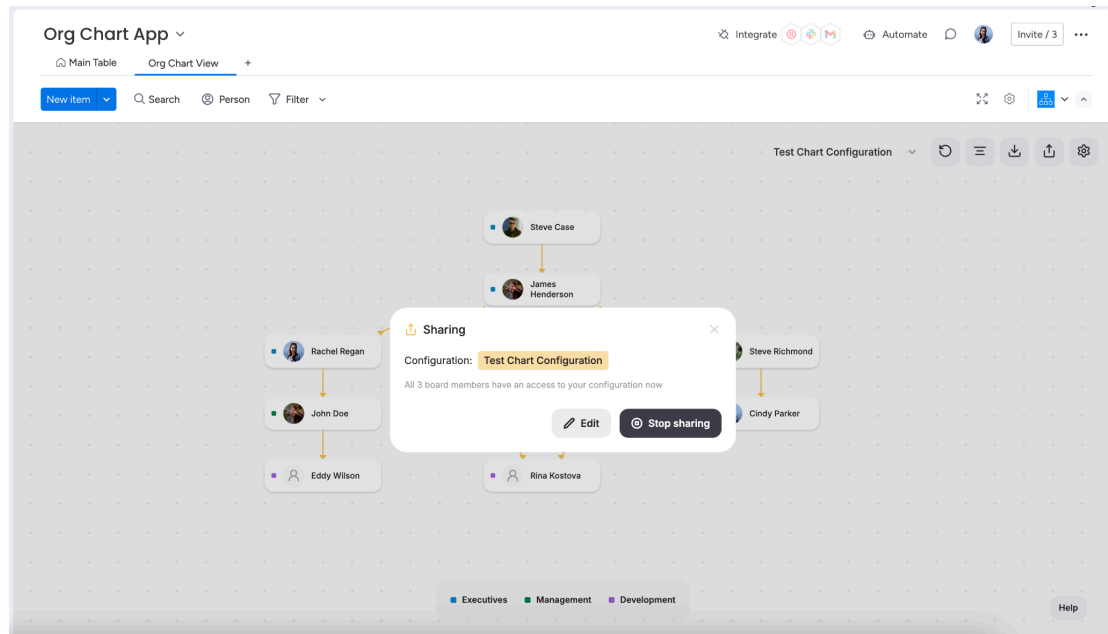
13. In order to export the Org Chart view for external use, there is 'Download the chart' control represented in the top right corner.
    a. Two options are available here - to export the chart in PDF or PNG file.
    b. This option is available starting under the Standard plan and higher.

14. User's chart configuration (items arrangement along with settings configured in the Settings menu) are automatically kept until the Reload button is clicked or chart direction is changed.
    a. This option is available starting under the Standard plan and higher.
15. Each board member has an ability to share their chart configuration with other board members using Share control represented in the top right corner.
    a. Once shared, the appropriate chart version will appear in the configuration dropdown for each member subscribed to the appropriate board.
    b. Shared configuration can't be changed by any board member other than the chart configuration owner.

c. This option is available only under the Pro plan.

Notes

1. Please be aware that having a lot of board items displayed on the org chart at the same time (generally more than 200 items) may lead to small delays in action performing - chart can freeze for some time on scaling or there might be a delay in changing item placement or relations. Having more than 1000 items may cause apps to crash.
2. Not all edits made to the item through the Edit option from the chart view can be immediately shown on the chart, namely changing the item's name or group belonging. To see the updates, Org Chart page should be reloaded. This is a monday.com limitation.