orginio

Manual

Issue Date: September 2022

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A Introduction

orginio was created in 2015 based on the need to offer small and medium-sized enterprises, which do not have their own human resources management system, the possibility of representing personnel data appropriately, clearly and automatically as an organization chart.

orginio allows data from Excel to be made easily accessible to all employees of the company in graphical form.

orginio is a Cloud-based application. For this reason, no installation is necessary. After login, orginio can be accessed any time and anywhere via an Internet connection. Organization charts can be created and displayed online.

Ingentis with orginio and the Ingentis org.manager offers a perfect bundle for corporate groups and decentralized companies. Subsidiaries and branch offices create organization charts online with orginio with minimum effort. In the next step the structures from orginio are integrated into the central company organization chart via a real-time interface

Scope and relevance

This manual does not claim to be a training document or a replacement for training. It does describe the program masks and the functions contained therein. Since new versions are released within short intervals, this manual cannot reflect the most current version status.

All chapters of the manual can also be accessed in the application via the three-dot button next to the search bar.

! There are feedback buttons on several places in the application. If you have comments, criticism or a suggestion for improving a particular function, we look forward to hearing from you.

B Login

Login

In order to create, edit or access your organization chart, you must first login. Only persons who have registered via the orginio website or who were stored as **user** (see Users [▸ 116]) can login. Enter your email address and password for the login. If you have forgotten your password, you can reset it via the **click here** button. You will then receive a mail for resetting your password and assigning a new password.
After login, the view mode for organization chart users opens (see View Mode [▸ 139]).

Logoff

To logoff, you must click on the **...** button. Both in **edit mode** and in **view mode** a menu opens containing the item **Logoff**. Furthermore, an automatic logoff is executed during longer periods of inactivity.

C Edit mode

The edit mode requires special permissions, which are assigned in the settings mask **Users** (see Users [▸ 116]) by an authorized user and can also be withdrawn again. In edit mode you can create, move or delete objects. In addition, you can maintain information on objects and make basic settings for your orginio account.

I Creating your first organization chart

Our set-up wizard will help you create your first organigram. At the top right, you can set the desired language via a drop-down menu. You then have three options:

- **Plain orginio:** An empty organigram is created, which you either create yourself from scratch or im-port existing data from an Excel or CSV file or one of the listed HR systems later. Afterwards you have to decide on a hierarchy type (more on this in the chapter Choosing the right structure [▸ 8]).
- **Orginio with demo data:** An organigram with fictional demo data is created. Afterwards you have to choose a hierarchy type (more in chapter Choosing the right structure [▸ 8]).
- **Integration of orginio with a partner system:** If you use one of the listed HR systems, an organisation chart can be created within a few minutes with the imported data. Depending on the HR system, you can then choose from the supported hierarchies. Attention: Some of the HR systems only support one type of hierarchy.

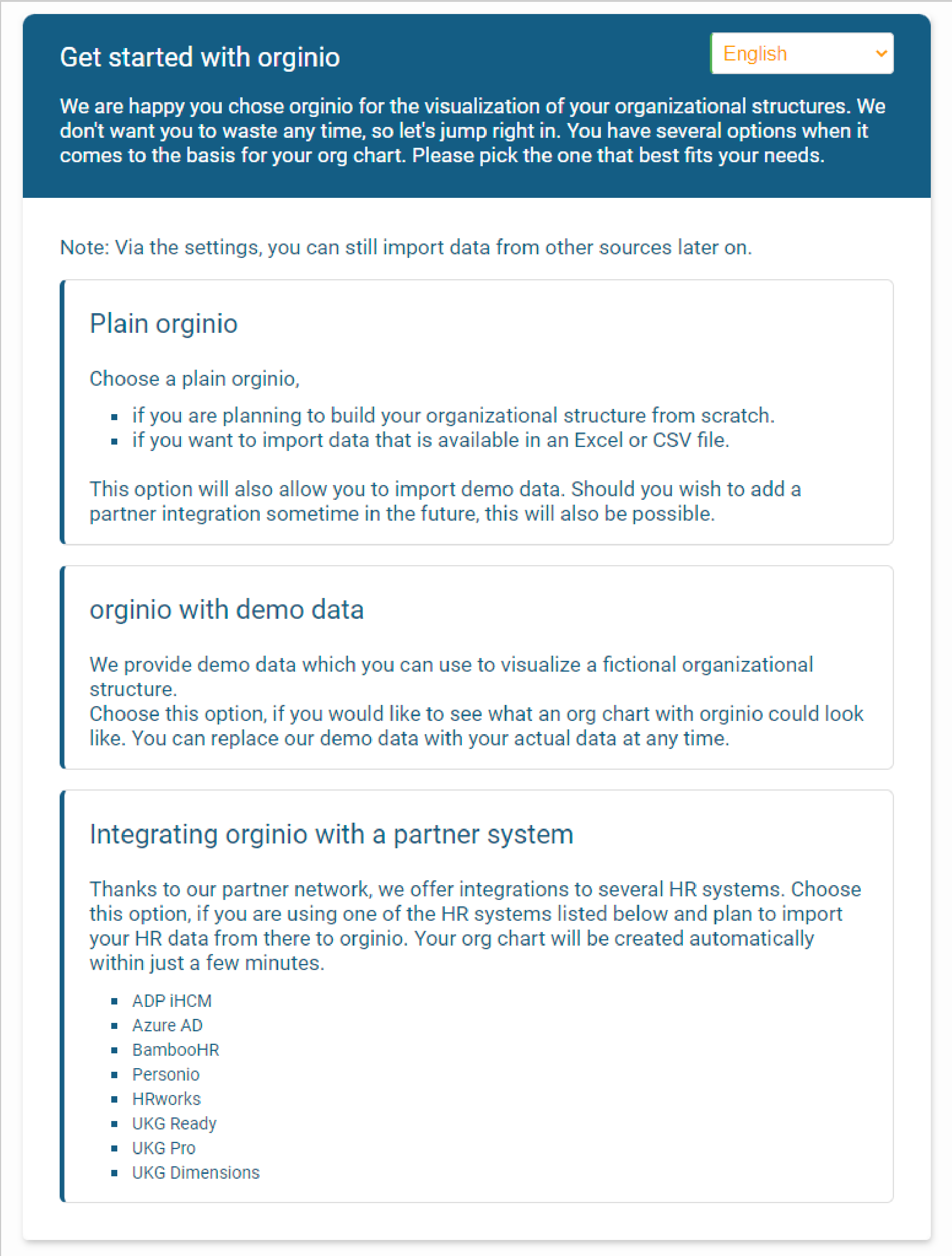


Fig. 1: Get started with orginio

1. Selection of the appropriate structure

In the second step of the setup wizard you are asked in which structure type your data is maintained. You can view the different structure types via arrow buttons. As soon as you have found the suitable structure for your database, confirm it with **Select this structure type**. After the selection, a summary is displayed.

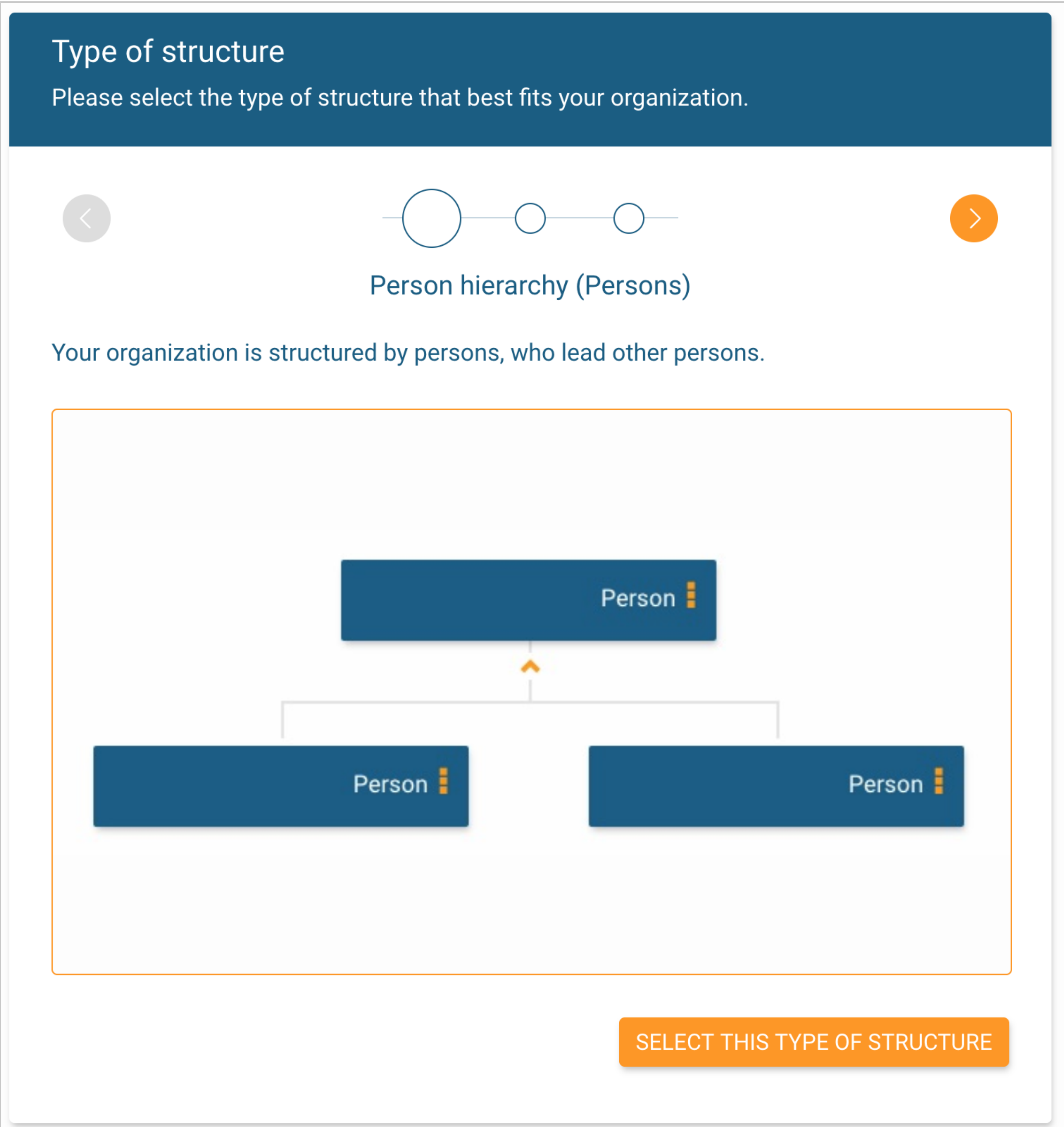


Fig. 2: Selection of the structure type

The organization structures available for selection are:

- **Department hierarchy** (Departments-Positions-Persons-Structure)

▪ **Position hierarchy** (Positions-Persons-Structure)
▪ **Person hierarchy** (Persons-Structure)

The organization structures consist of the following object types:

▪ **Persons** stand for the actual person and normally contains information such as first name, last name and date of birth.
▪ **Positions** stand for the defined positions. Employees (**persons**) are assigned to these positions. If no suitable employee is available yet for a position, it is considered unfilled. One position can also be filled by several persons and one person can be assigned to several positions (see Fill multiple positions (professional) [▸ 161]).
▪ **Departments** combine several **positions** administratively. One or more positions can be indicated as managerial positions of the department. It is also possible to assign one position to more than one department (regardless of whether managerial or "normal"). The procedure necessary for this is along the same lines as the positions from the How-To-Chapter Fill multiple positions (professional) [▸ 161].

After selecting a structure, you decide in the next step whether to create the objects of the structure manually or whether these should be read in via the **Import data**.

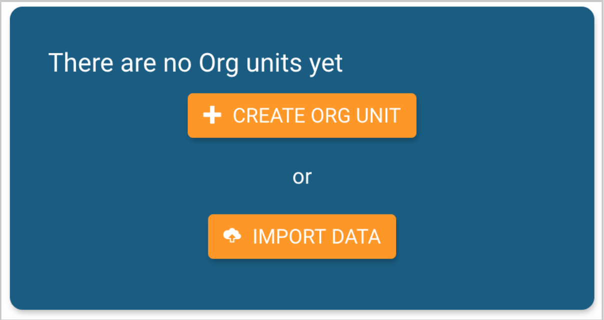


Fig. 3: Manual creation of the structure or data import

! Owing to the wide variety of structure types and objects that can occur in practice, descriptions will be written object-neutral for the remainder of this manual apart from a few exceptions. For this reason, the respective masks in the figures are only exemplary representations.

2. Data Import

There are four ways to import data to orginio. You can choose between the import types **Excel / CSV, Azure AD, BambooHR, Personio, HRworks, UKG Ready, UKG Pro, UKG Dimensions, Profile pictures**, **BambooHR** or **Data schema**. Attention: All import types that are not compatible with the selected structure are greyed out here.

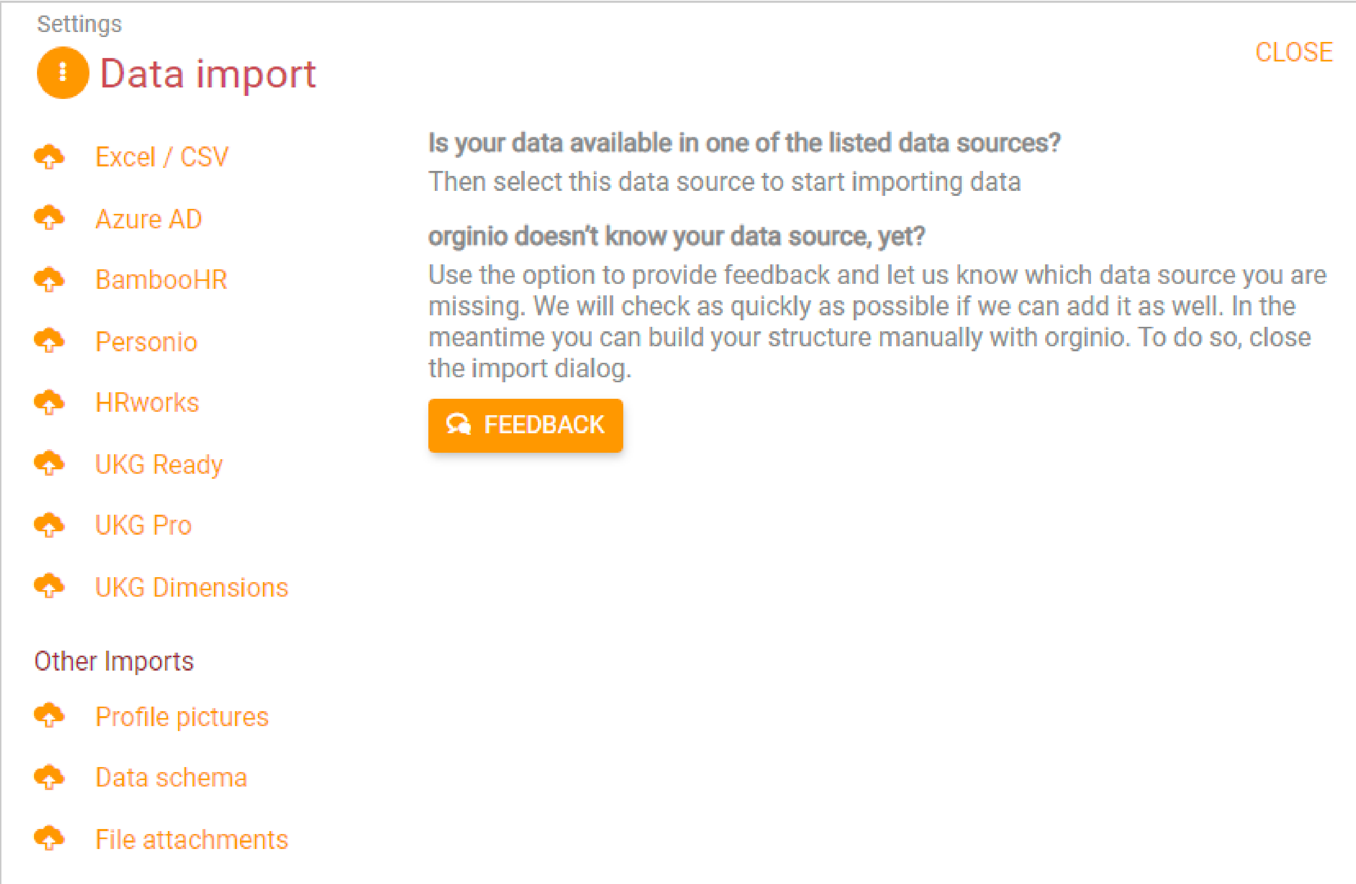


Fig. 4: Data Import

2.1 Excel / CSV

A new import can be started by all users who have the **Edit data** permission (see Users [▶ 116]).

To import a CSV or XLS(X) file, drag this either into the orange box or select the file via the Explorer. To select the file via the Explorer, click on **Select the file**.

An import API exists for the Excel/CSV import. Scripts can be used for this API to enable automation of data imports. The use of the API is described in detail under Import API [▶ 99].

Data can also be loaded from a Dropbox. To do this, the yellow **OPEN DROPBOX** button must be clicked. It is important that pop-ups are allowed for the browser window. Afterwards, the login data must be entered and then the desired files in the Dropbox must be selected.

To obtain an example for the possible structure of a functional CSV or XLS(X) file, you can click on download here. After that, the download starts with a demo XLS(X) file. The demo file corresponds to the selected structure type.

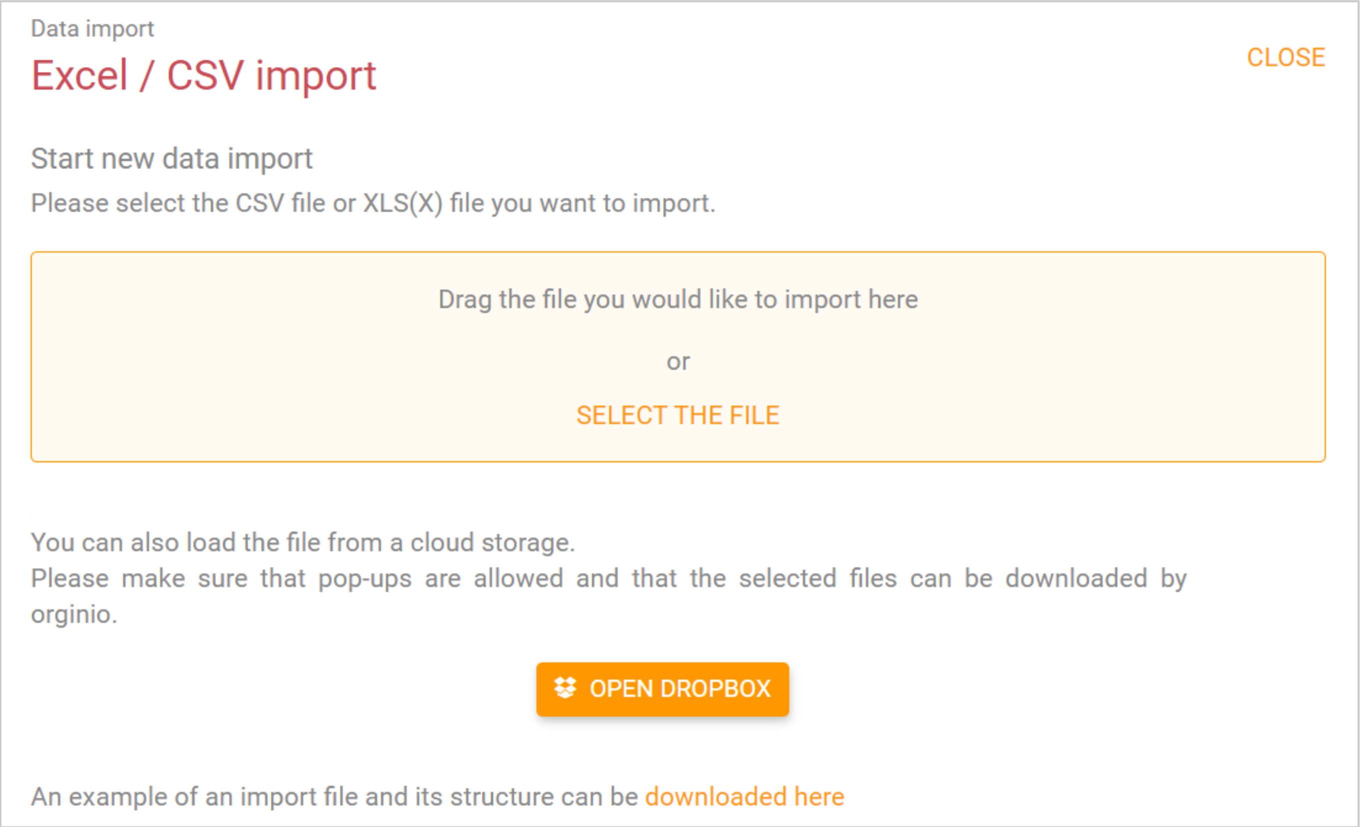


Fig. 5: Data Import - Excel/CSV

In the following steps, the columns of the import file are assigned to the required data fields by means of automatic detection by orginio or by manual selection. This process is described once for the department hierarchy and once for the person hierarchy (seeSelection of the appropriate structure [▸ 8]).

Firstly, a selection of data fields and links specified by orginio is available per data type. Secondly, additional data fields can be added without interrupting the current import in the process. From the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]) it is also possible to create user-defined data fields (see Schema [▸ 87]) and relations (see Relations [▸ 92]).

> **!** In subsequent imports, the column headings last assigned are loaded automatically. This requires that the column headings of the new import file match the column headings of the file last imported. The filename itself is not relevant for the assignment.

See also

Scheduling [97]

2.1.1 Excel / CSV Import - Department Hierarchy

After uploading the file, a tab (here e.g. orginio-demo.xlsx (organization units)) is created for each spreadsheet.

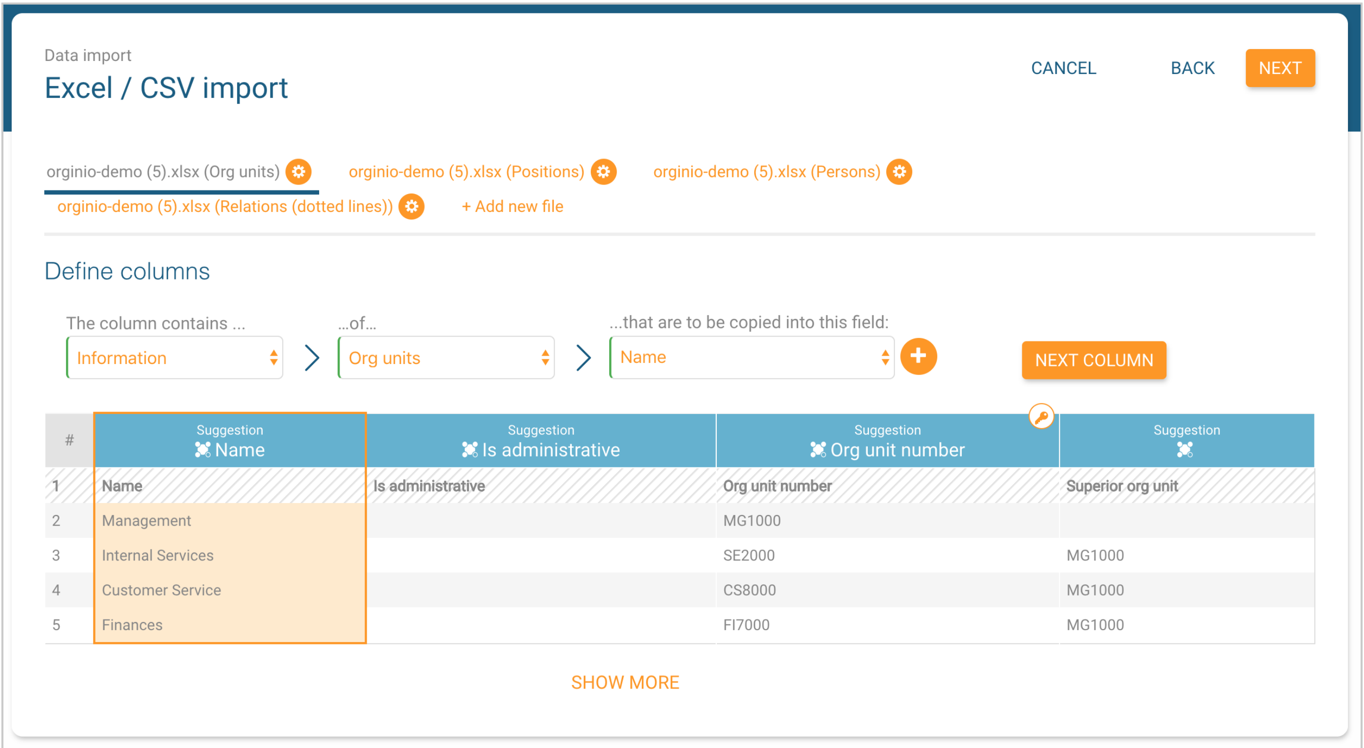


Fig. 6: Data import assignment - Department hierarchy

By pressing the **+Add file** button at the top right next to the tabs, the Explorer opens and further spreadsheets or tabs can be added.

2.1.1.1 File settings

The file settings can be accessed using the gears icon. The settings can be made individually for each spreadsheet.

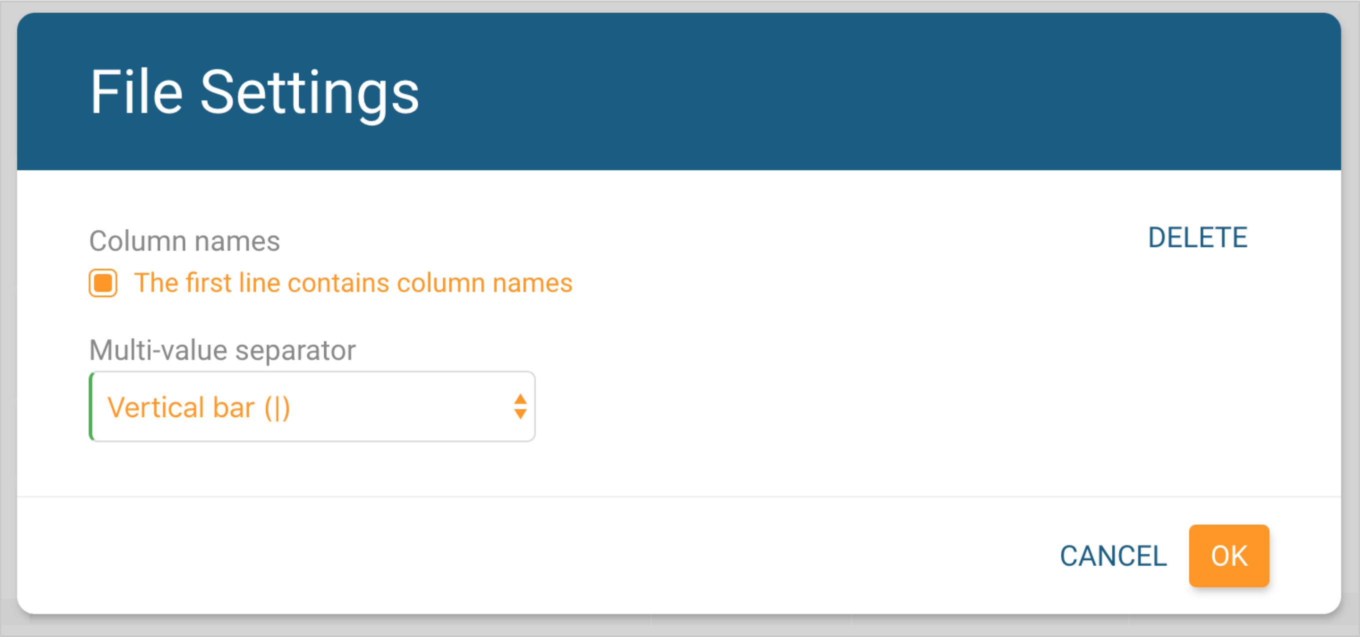


Fig. 7: File settings

First row contains column names allows you to define manually whether the first row should be used as the column heading. If the first row is used for the column name, it is highlighted in gray.

Multiple value-separator defines how multiple values should be detected. Several values of the same data field can be maintained in a single cell in the spreadsheet by separators. To ensure that data fields can contain multiple values, the **multiple values** checkmark must be active at the respective data field (see Schema [▸ 87]). One example application for multiple values is the maintenance of several telephone numbers of the same person.

You can remove the currently selected spreadsheet from the import with **Delete**.

> **!** Data Import Process:
>
> Using the **Back** and **Next** buttons in the upper right-hand area, further adjustments to the previous steps can be made during the import.

2.1.1.2 Define columns

In the column definition, the content of a column is assigned to a data type and data field. Possible data types are departments, positions and persons. Data fields are attributes of these data types. For example, the "personnel number" data field is an attribute of the "person" data type.

The column definition is defined individually for each column. It is read from left to right and produces a data set.

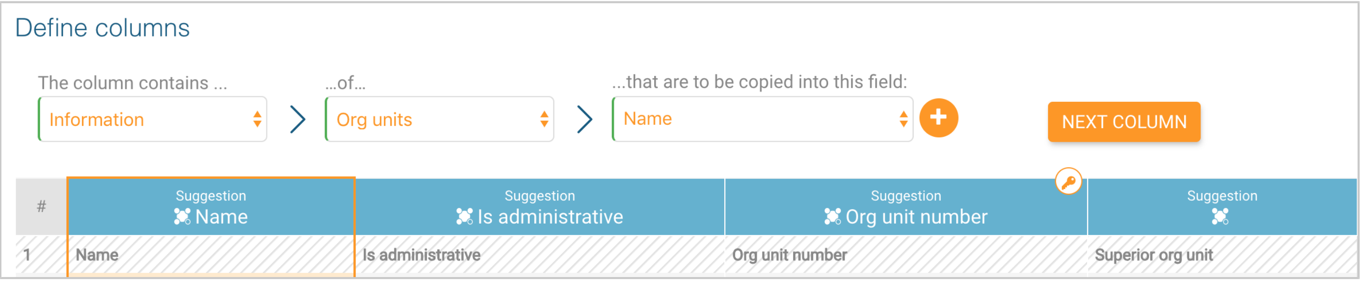


Fig. 8: Defining column type - Department hierarchy

Here: "The column contains information about departments that should be included in this field: Name". Thus, the name data field of the data departments data type is filled by this column. If you fill out this row from left to right, then orginio adjusts the possible remaining selection fields automatically.

orginio tries to detect automatically which content a column contains. Each detected column is marked in light blue and receives a "Suggestion" heading. The suggestion of the currently selected column is accepted automatically and marked dark blue as soon as a new column is selected.

! A column that is not detected and not manually assigned is marked gray and is ignored in the further import. If a suggestion is neither accepted nor adapted, it is deemed accepted once the **Next** button is clicked.

The following column types are available for the manual column definition:

- **Information:** The column contains information about the object.
- **Unique identifier:** The column content is used as information or as a normal data field as well as a unique distinguishing feature of the data type.
- **Relation:** A relation in orginio links two data types by a dotted line.
- **Ignore during import**: The column and its content are ignored and not imported to orginio.

The column types **Information**, **unique identifier** and **Relation** will be explained in more detail in the following three chapters.

2.1.1.3 Column Type - Information

With the **Information** column type, you define that the column content should be assigned to a data field in orginio - using a data type.

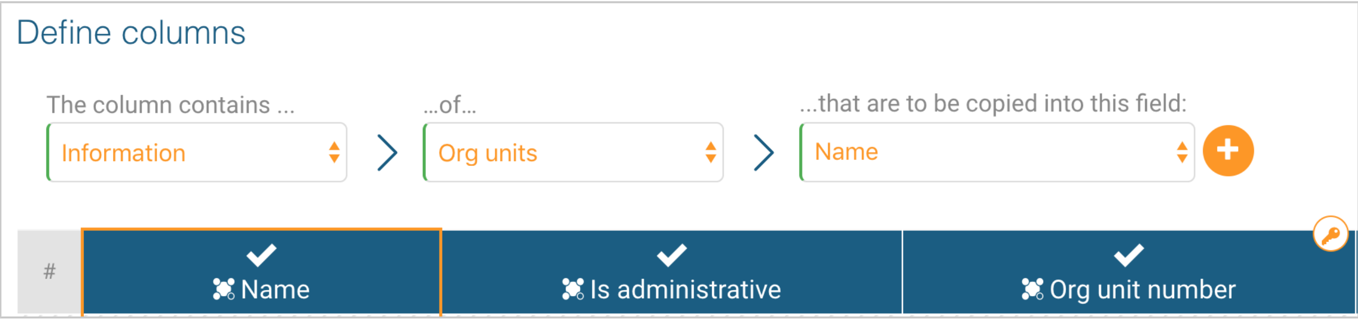


Fig. 9: Column type - Information - Department hierarchy

"The column contains information about departments that should be included in this field: Name". In this case, the column content is assigned to the "Name" data field of the "Department" data type.

The data fields contained in orginio by default can be assigned to a single column only. If a previously assigned data field is assigned to a second column, the first selection is deleted again. Using the plus sign, additional data types (see Schema [▸ 87]) can be defined, and thus it is possible to supplement missing data fields without terminating the current import. From the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]) it is also possible to create multi-value data fields (see Schema [▸ 87]) that can be assigned to multiple columns.

2.1.1.4 Column Type - Unique identifier

Through the **Unique identifier** column type the column content is used as **information** or as a normal data field as well as a unique distinguishing feature of the data type. Each object must have a **unique identifier**since only in this way can the objects be uniquely identified.

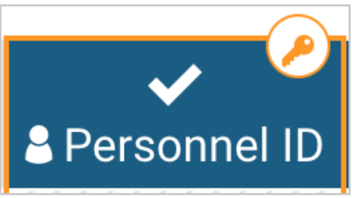


Fig. 10: Column Type - Unique identifier

Any column that only has unique values can be meaningfully used for this purpose. Besides the ID, this is typically the email address.

The assignment of a key value is optional, since orginio can recognize unique fields automatically and use them as key fields. A column used as a **unique identifier** is marked with a key icon.

If there are **unique identifier** of different data types in the same line, orginio creates a link between these automatically.

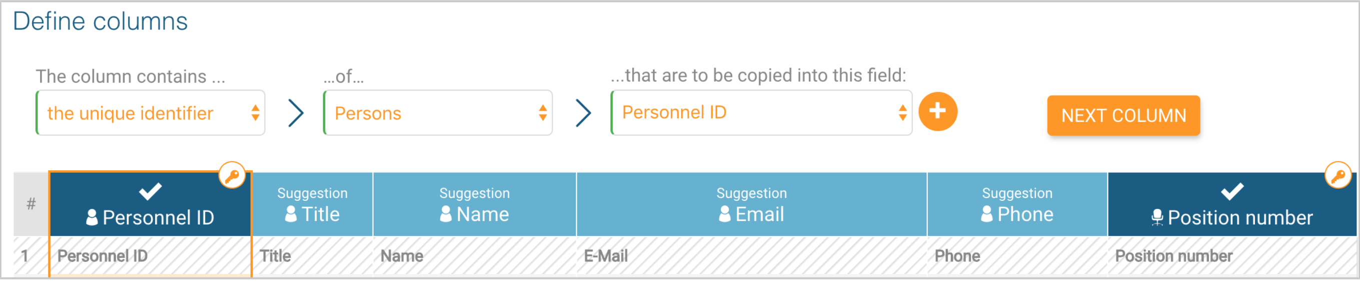


Fig. 11: Relation by unique identifier- Department hierarchy

In this example, the **unique identifier** of persons is the "personnel number", the **unique identifier** of positions is the "position number". Thus, orginio assigns the respective persons to the corresponding positions. Lines are defined as a separate column type.

2.1.1.5 Column Type - Relation

A **relation** in orginio links two data types, a start object and target object.

A column with a column type **relation** is marked by the relation icon.

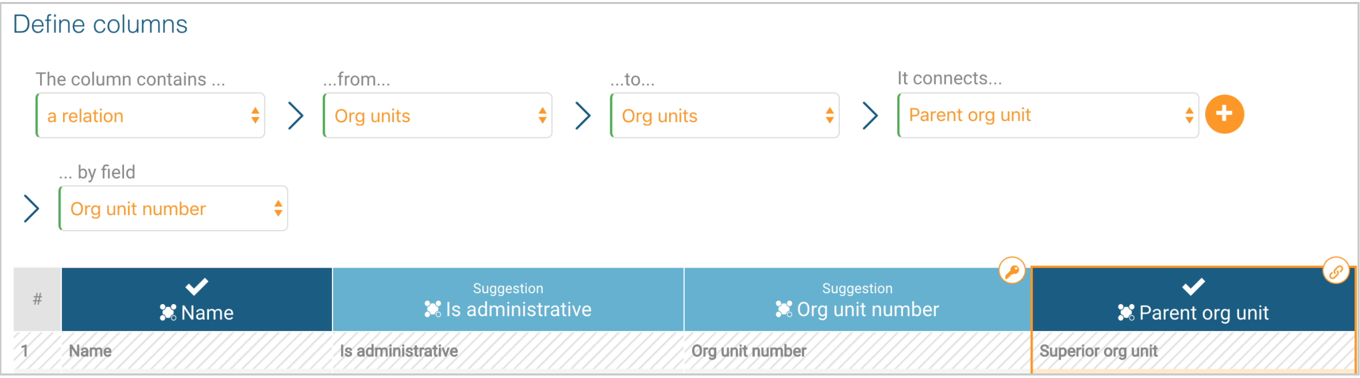


Fig. 12: Column type - Relation - Department hierarchy

The relation definition is explained in four steps in the following:

1. Define start object

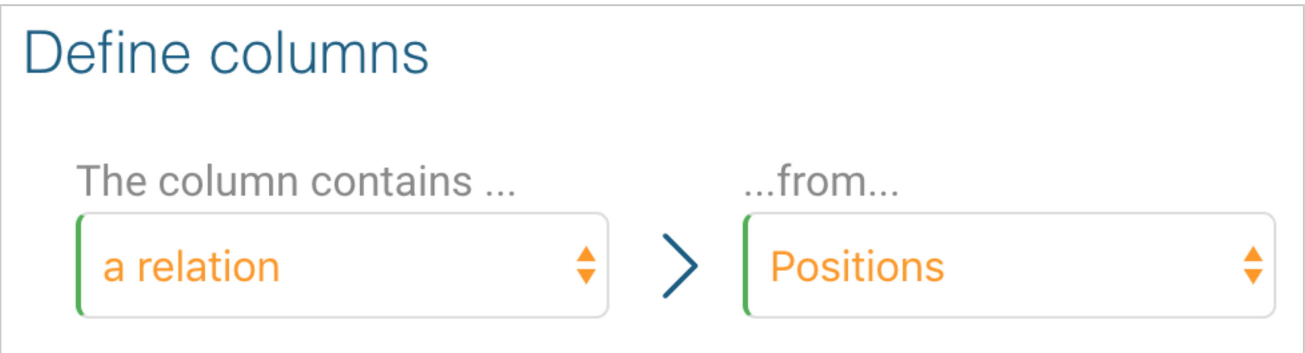


Fig. 13: Define start object - Department hierarchy

"The column contains a relation from positions..."

First select which data type is used as a starting point for the relation. In this case, positions are linked to the subsequent target object.

2. Define target object

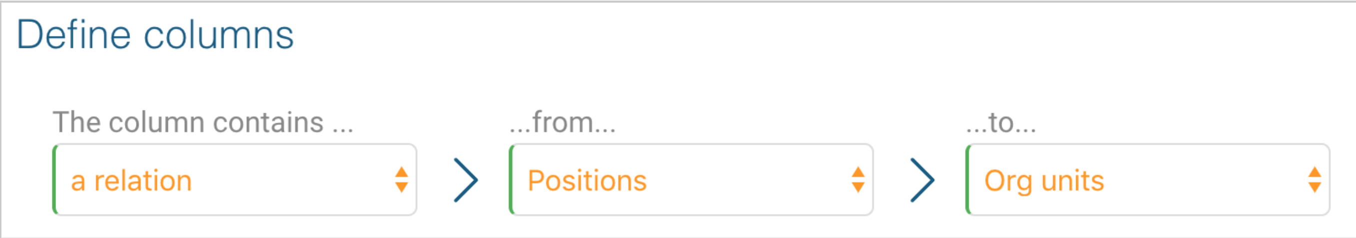


Fig. 14: Define target object - Department hierarchy

"The column contains a relation from Positions to Org units..."

In the second step, select which data type the target object belongs to. In this case, positions are linked with departments.

3. Define type of relation

Fig. 15: Define type of relation - Department hierarchy

"The column contains a relation of positions with Org units. It connects..."

In the third step, you define which type of relation between the objects should be affected. In this case, a link between positions and departments is created. Using the plus sign, from the Feature Set complete COMFORT or higher (see Feature-Sets [▸ 164]) additional relation types can be created.

You can read about the procedure for this in chapter Relations [▸ 92].

> **!** The relation used in this example under **It connects...** bears the name Org unit. Do not confuse this with the Org unit data type.

4. Defining condition for selection of a target object

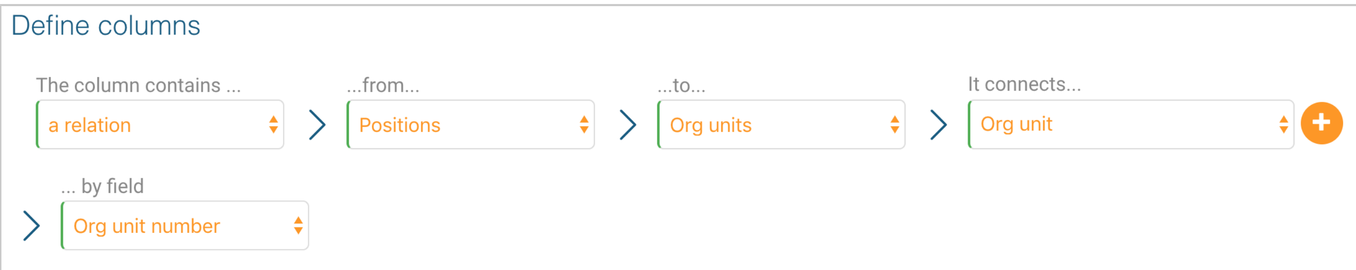


Fig. 16: Define condition for selection of a target object - Department hierarchy

"The column contains a relation from positions to Org units. It connects Org unit by field Org unit number." In the final step, you define which data field identifies the target objects. The data field selected here must match the data field of the column currently marked in terms of content (which the relation icon bears). In this case, the positions are assigned to the departments by means of the department number.

2.1.1.6 Type of Import

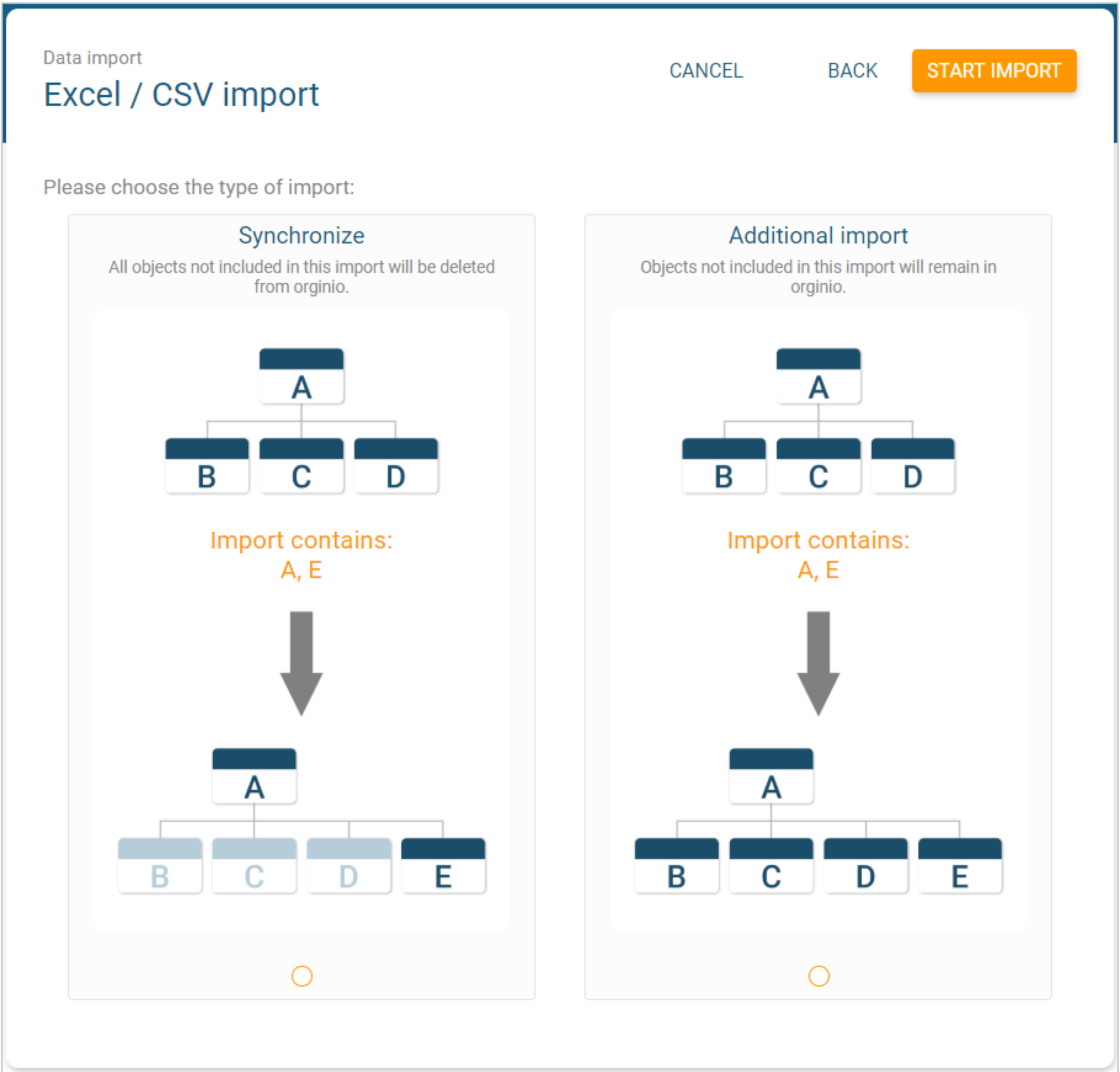


Fig. 17: Select type of import

! If data already exists in orginio, you can select which import type should be used.

Synchronize

The existing data in orginio is synchronized with the current import. Existing objects not listed in the new import are deleted in the process. Empty cells in imported columns overwrite the previous corresponding values. This only involves objects of data types and contents of data fields included in the import, however. If, for example, only departments are included in the new import, no person data fields or position data fields will be affected by this. However, departments and links between departments and positions or persons will be changed.

All new data is added to the existing data.

Additionally import

Fields and objects are newly added and existing values are overwritten. Empty cells in the import data are ignored.

> **!** From the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]) it is possible to cancel the data import using the Data Recovery (see Data [▸ 84]).

2.1.1.7 Preview

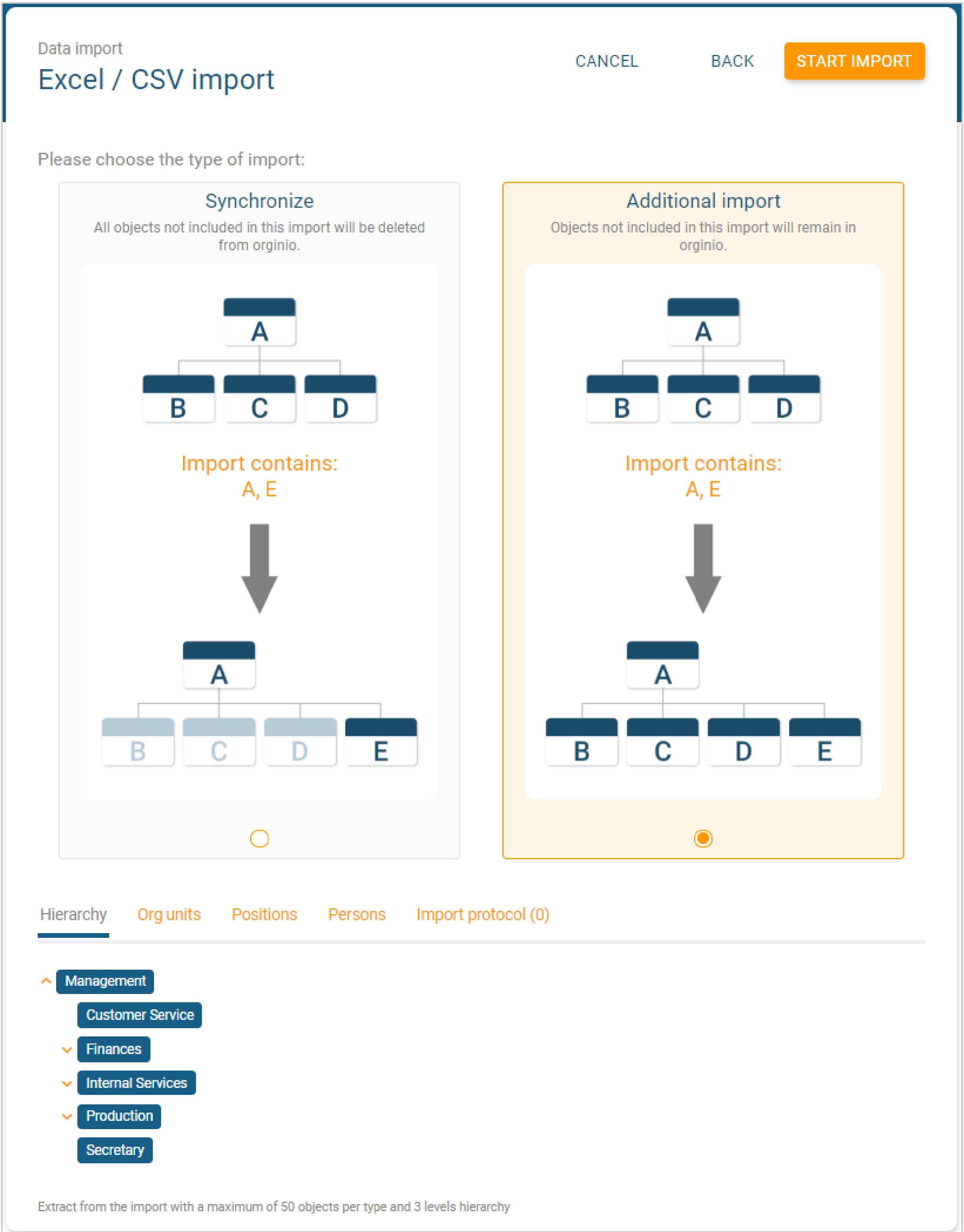


Fig. 18: Preview - Department hierarchy

The preview in the lower area displays a maximum of 50 objects per data type and three hierarchy levels. In the **Hierarchy** tab, the objects are represented by which the organization chart is created. In a department hierarchy (see Selection of the appropriate structure [▶ 8]) there are departments or organization units. In the **depart-**

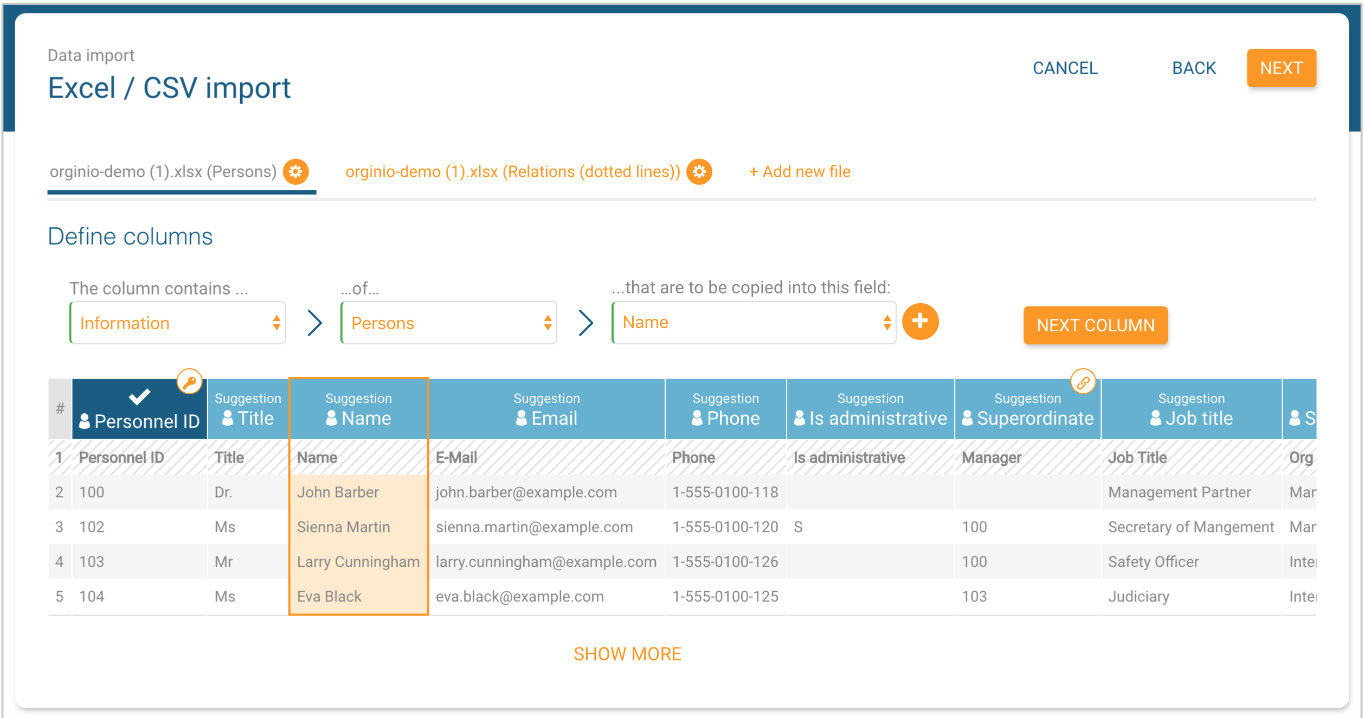
ments, **positions**, **persons** data type tabs it is possible to check whether fields have been assigned and filled correctly. In the preview tabs, only objects contained in the current import are displayed. If no objects from an entire data type are imported, the corresponding tab is not displayed either.

In the **Import log** tab, the following errors or information can be listed:

- **Cycle in hierarchy present**: Circular references in the data are present if an object refers to itself or to its predecessor so that a closed loop arises. The organization chart is created despite the circular references. Circular references are resolved at any point in the "circle". Thus, an organization chart is represented, but with a randomly selected highest department. Please remedy the circular dependencies in the database.
- **Relation cannot be resolved**: A link finds no target object. Please check whether its **unique identifier** have been maintained correctly.
- **Object has no key value**: The corresponding cell of the column used as a **unique identifier** contains no value. Please update this.
- **The hierarchy object has no parents and no children**: Hierarchy objects not linked to the other hierarchy objects are represented in a group under an object name "Not in hierarchy".

2.1.2 Excel / CSV Import - Person hierarchy

After uploading the file, a tab (here e.g. orginio-demo (1).xlsx (persons)) is created for each spreadsheet.



#	Personnel ID	Suggestion Title	Suggestion Name	Suggestion Email	Suggestion Phone	Suggestion Is administrative	Suggestion Superordinate	Suggestion Job title	S
1	Personnel ID	Title	Name	E-Mail	Phone	Is administrative	Manager	Job Title	Org
2	100	Dr.	John Barber	john.barber@example.com	1-555-0100-118			Management Partner	Mar
3	102	Ms	Sienna Martin	sienna.martin@example.com	1-555-0100-120	S	100	Secretary of Mangement	Mar
4	103	Mr	Larry Cunningham	larry.cunningham@example.com	1-555-0100-126		100	Safety Officer	Inte
5	104	Ms	Eva Black	eva.black@example.com	1-555-0100-125		103	Judiciary	Inte

Fig. 19: Data import assignment - Person hierarchy

By pressing the **+Add file** button at the top right next to the tabs, the Explorer opens and further spreadsheets or tabs can be added.

2.1.2.1 File settings

The file settings can be accessed using the gears icon. The settings can be made individually for each spreadsheet.

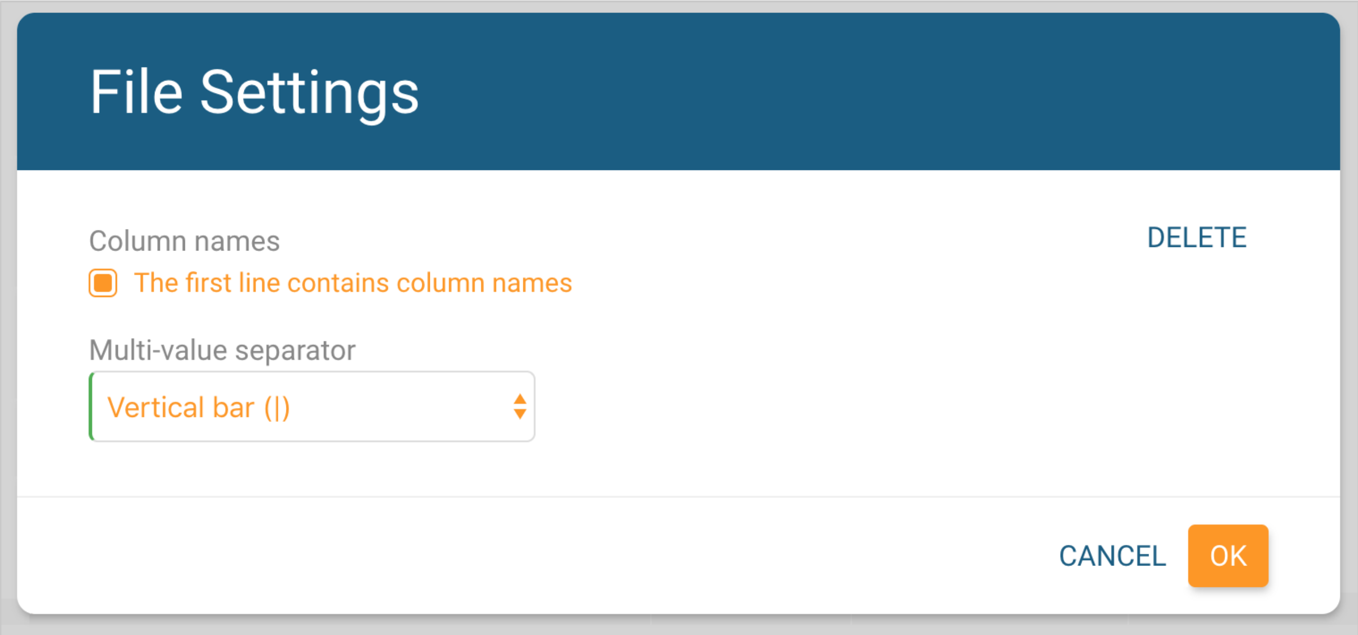


Fig. 20: File settings

First row contains column names allows you to define manually whether the first row should be used as the column heading. If the first row is used for the column name, it is highlighted in gray.

Multiple value-separator defines how multiple values should be detected. Several values of the same data field can be maintained in a single cell in the spreadsheet by separators. To ensure that data fields can contain multiple values, the **multiple values** checkmark must be active at the respective data field (see Schema [▶ 87]). One example application for multiple values is the maintenance of several telephone numbers of the same person.

You can remove the currently selected spreadsheet from the import with **Delete**.

> **!** Data Import Process:
>
> Using the **Back** and **Next** buttons in the upper right-hand area, further adjustments to the previous steps can be made during the import.

2.1.2.2 Define columns

In the column definition, the content of a column is assigned to a data field. Data fields are attributes of data types, in person hierarchies "persons" are exclusively available as data type. Data fields are attributes of data types. Thus, the "personnel number" data field is an attribute of the "person" data type.

The column definition is defined individually for each column. It is read from left to right and produces a data set.

Fig. 21: Define columns - person hierarchy

Here: "The column contains information about persons that should be included in this field: Name". Thus, the name data field is filled by this column. If you fill out this line from left to right, then orginio adjusts the possible remaining selection fields automatically.

orginio tries to detect automatically which content a column contains. Each detected column is marked in light blue and receives a "Suggestion" heading. The suggestion of the currently selected column is accepted automatically and marked dark blue as soon as a new column is selected.

> **!** A column that is not detected and not manually assigned is marked gray and is ignored in the further import. If a suggestion is neither accepted nor adapted, it is deemed accepted once the **Next** button is clicked.

The following column types are available for the manual column definition:

- **Information:** The column contains information about the object.
- **Unique identifier:** The column content is used as information or as a normal data field as well as a unique distinguishing feature of the data type.
- **Relation:** A relation in orginio links two data types by a dotted line.
- **Ignore during import**: The column and its content are ignored and not imported to orginio.

The column types **Information**, **unique identifier** and **Relation** will be explained in more detail in the following three chapters.

2.1.2.3 Column Type: Information

With the **Information** column type, you define that the column content should be assigned to a data field.

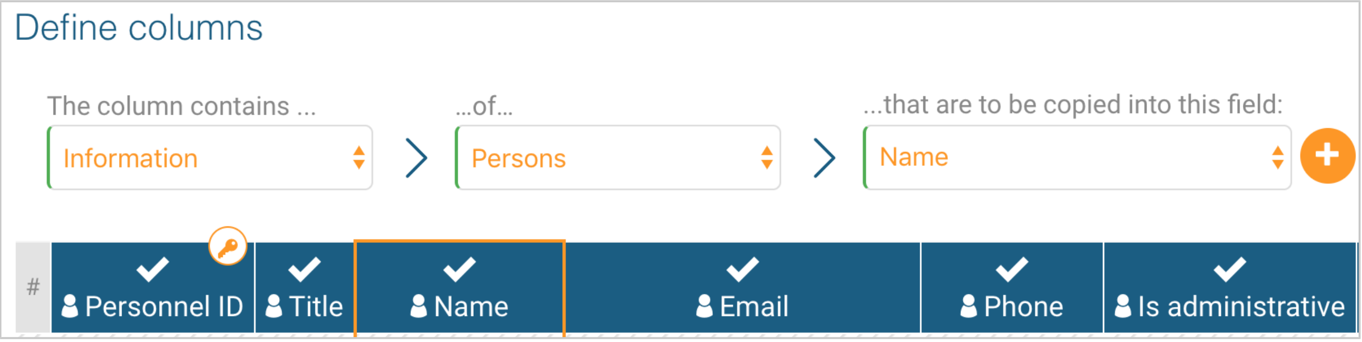


Fig. 22: Column Type - Information - Person hierarchy

"The column contains information about persons that should be included in this field: Name". In this case, the column content is assigned to the "Name" data field.

The data fields contained in orginio by default can be assigned to a single column only. If a previously assigned data field is assigned to a second column, the first selection is deleted again. Using the plus sign, additional data types (see Schema [▸ 87]) can be defined, and thus it is possible to supplement missing data fields without terminating the current import. From the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]) it is also possible to create multi-value data fields (see Schema [▸ 87]) that can be assigned to multiple columns.

2.1.2.4 Column Type: Unique identifier

Through the **Unique identifier** column type the column content is used as **information** or as a normal data field as well as a unique distinguishing feature of the data type. Each object must have a **unique identifier** since only in this way can the objects be uniquely identified.

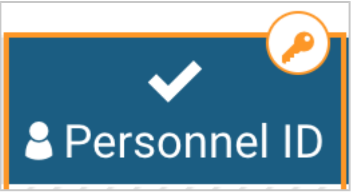


Fig. 23: Column Type - Unique identifier

Any column that only has unique values can be meaningfully used for this purpose. Besides the ID, this is typically the email address for persons.

The assignment of a key value is optional, since orginio can recognize unique fields automatically and use them as key fields. A column used as a **unique identifier** is marked with a key icon.

2.1.2.5 Column Type: Relation

A **relation** in orginio always links two data types, a start object and target object.

A column with a column type **relation** is marked by the relation icon.

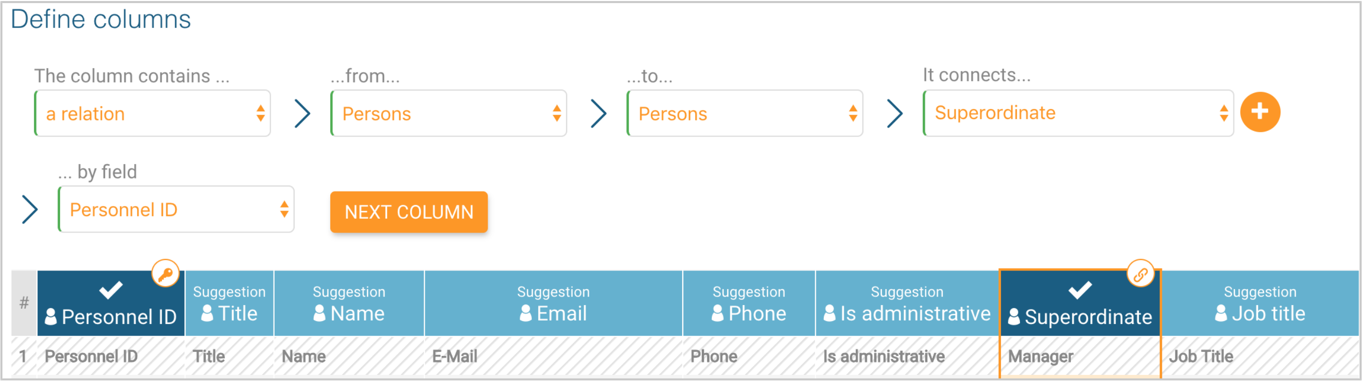


Fig. 24: Column Type - Relation - Person hierarchy

The relation definition is explained in three steps in the following:

1. Define start object and target object

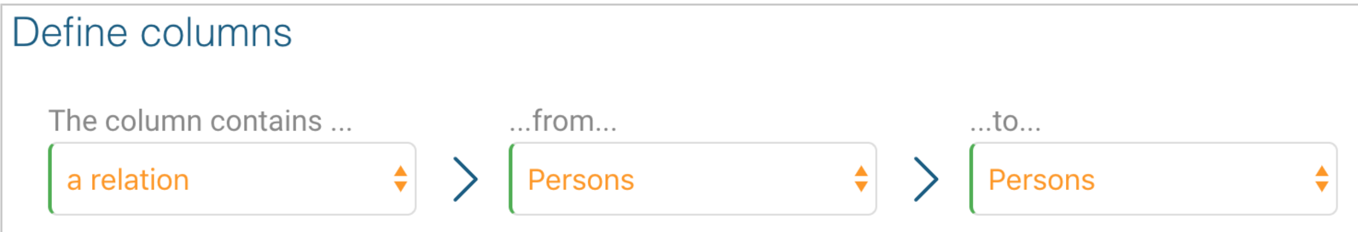


Fig. 25: Define start object and target object - Person hierarchy

"The column contains one row of persons with persons..."

First define that the column is used for a relation. In addition, select which data type the relation is assigned from. In the P structure (see Selection of the appropriate structure [▶ 8]) persons are only available as possible data types.

2. Define type of relation

Fig. 26: Define type of relation - Person hierarchy

"The column contains a relation from persons to persons. It connects Superordinate..."

In the second step, you define which type of relation between the objects should be affected. In this case, a supervisor link is created between persons and the "from person" is the supervisor and the "with person" is the subordinate employee.

Using the plus sign, from the Feature Set complete COMFORT or higher (see Feature-Sets [▶ 164]) additional link types can be created.

You can read about the procedure for this in chapter Relations [▶ 92].

3. Defining condition for selection of a target object

Fig. 27: Define condition for selection of a target object - Person hierarchy

"The column contains a relation from Persons to Persons. It connects Superordinate...". In the final step, you define which data field identifies the target objects.

The data field selected here must match the data field of the column currently marked in terms of content (which the link icon bears). In this case, supervisors are assigned by means of the personnel number.

2.1.2.6 Type of Import

Fig. 28: Select type of import

! If data already exists in orginio, you can select which import type should be used.

Synchronize

The existing data in orginio is synchronized with the current import. Existing objects or persons not listed in the new import are deleted in the process. Empty cells in imported columns overwrite the previous corresponding values.

All new data is added to the existing data.

Additionally import

Fields and objects are newly added and existing values are overwritten. Empty cells in the import data are ignored.

> **!** From the Feature Set proceed PERFECT or higher (see Feature-Sets [▶ 164]) it is possible to cancel the data import using the Data Recovery (see Data [▶ 84]).

2.1.2.7 Preview

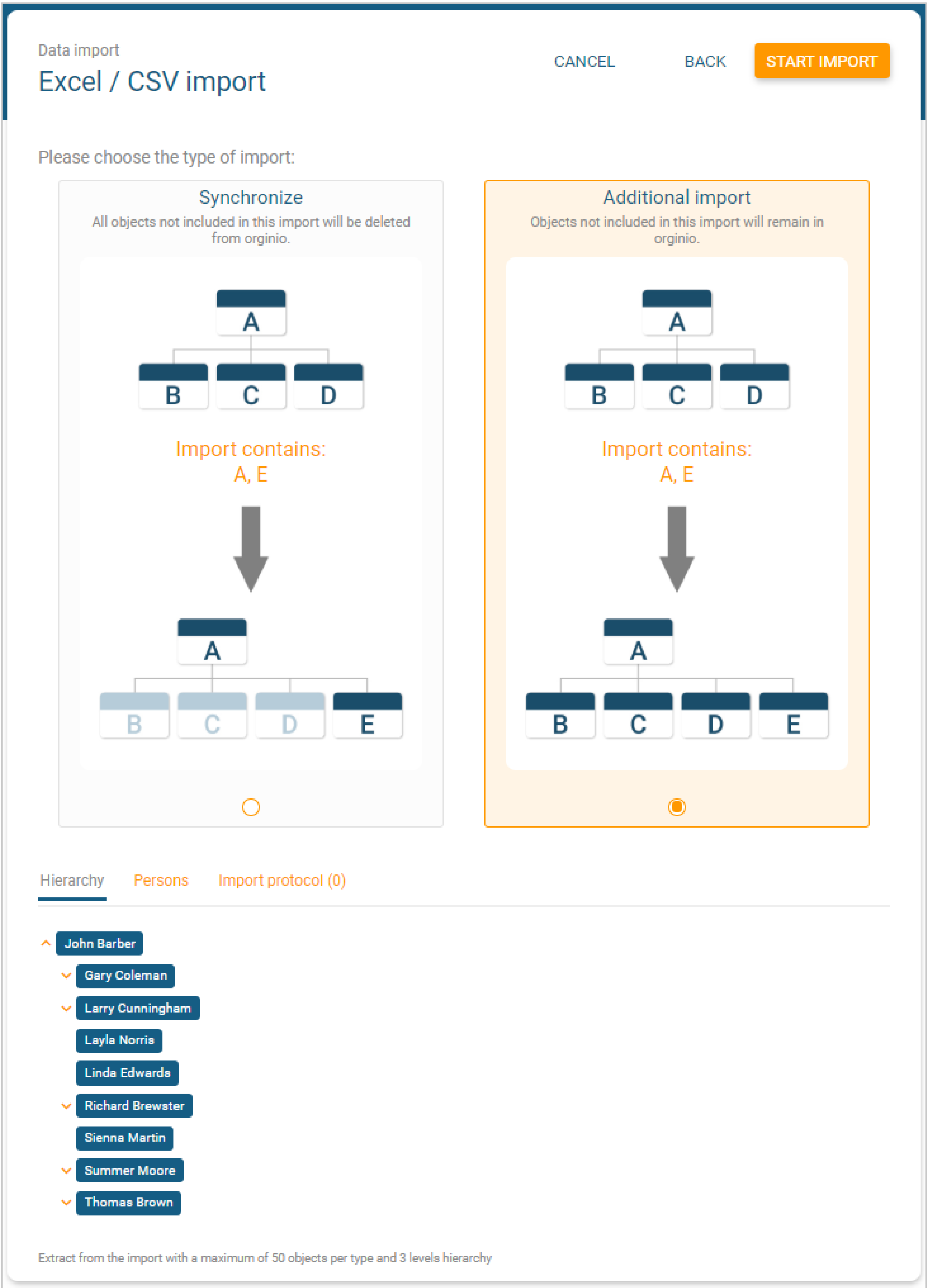


Fig. 29: Preview - Person hierarchy

The preview in the lower area displays a maximum of 50 objects or persons per data type and three hierarchy levels. In the **Hierarchy** tab the hierarchical structure of the organization chart is represented. In the **Persons** tab it is possible to check whether fields have been assigned and filled correctly. In the **Import log** tab, the following errors or information can be listed:

- **Cycle in hierarchy present**: Circular references in the data are present if an object refers to itself or to its predecessor so that a closed loop arises. The organization chart is created despite the circular references. Circular references are resolved at any point in the "circle". Thus, an organization chart is represented, but with a randomly selected hierarchically highest department. Please remedy the circular dependencies in the database.
- **Relation cannot be resolved**: A link finds no target object. Please check whether its **unique keys** have been maintained correctly.
- **Object has no key value**: The corresponding cell of the column used as a **unique key** contains no value. Please update this.
- **The hierarchy object has not parents and no children**: Persons not linked to the other persons are represented in a group under an object name "Not in hierarchy".

2.2 Azure AD

To import data from Azure AD to orginio via the web interface, click the **IMPORT DATA** button in orginio and then select the **Azure AD** data source.

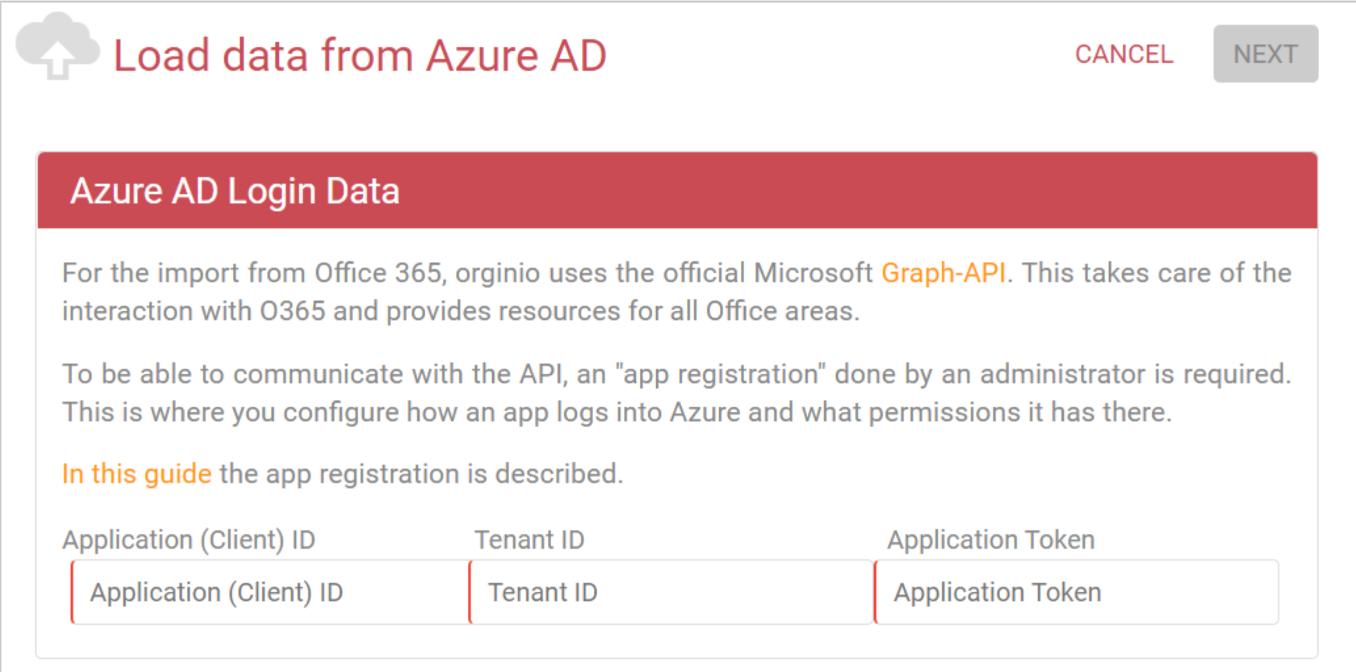


Fig. 30: Data Import - Azure AD

For the import, orginio uses the official Microsoft Graph interface. For the communication, however, an "app registration" is required. You will find a link in orginio to detailed instructions on how to perform the "app registration" by an administrator. After the registration you enter the client and client ID as well as the application token.

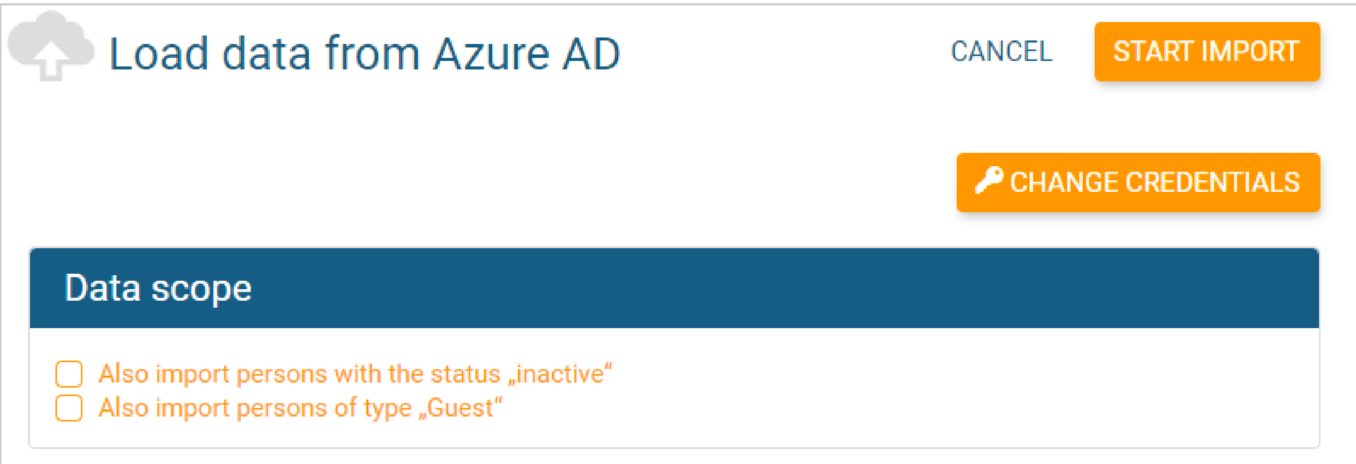


Fig. 31: Data Import - Azure AD 2

After registration data has been entered, you will be asked for the scope of data. Here, persons with **the status inactive** as well as **guests** can be imported from the data source by ticking them. The field assignment and the import filter can be adjusted. You can read more about this in the chapters Field Assignment and Import Filter.The import is then carried out via the **IMPORT START** button at the top right.

For Azure AD, only the person hierarchy is available. What data will be synchronized:

Azure AD Field	orginio: technical name
businessPhones.0	phoneNumbers>business

department	department
displayName	displayName
employeeID	identifier
givenName	firstName
id	custom.objectID
jobTitle	jobTitle
mail	email
mobilePhone	phoneNumbers>business
surname	lastName
city	custom.city
country	custom.country
manager.id	custom.objectId
photo	picture

See also

- Field Assignment [51]
- Import Filter [53]

2.3 BambooHR

To connect data from BambooHR to orginio via the Web interface, click on the **IMPORT DATA** button in orginio and then select the data **BambooHR** source.

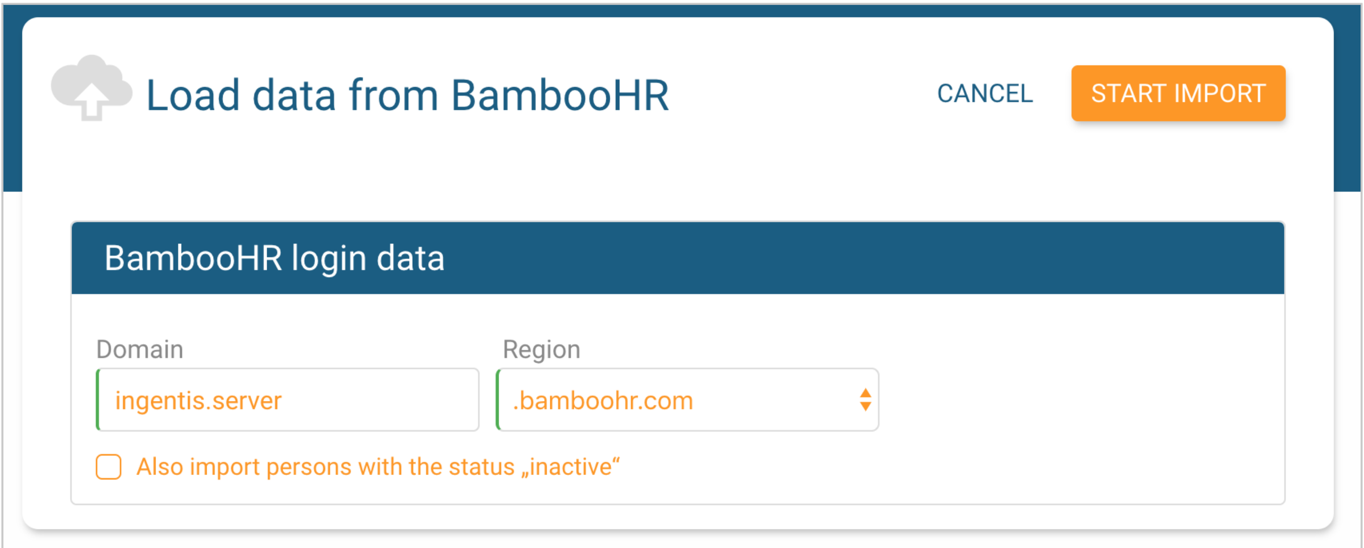


Fig. 32: Data Import - BambooHR

Under Domain enter your domain without the "bamboohr.com", or "bamboohr.co.uk" ending. Select these under region.

By clicking in the checkbox **Also import persons with the "inactive" status** persons with the "inactive" status will also be imported.

The field assignment and the import filter can be adjusted. You can read more about this in the chapters Field Assignment and Import Filter .

Then click on **START IMPORT**.

> **!** The first time you want to retrieve data from your BambooHR account, you will be forwarded one time only to a BambooHR page in order to enter your login data and thus access to retrieve orginio authorized data. This is only necessary for the first BambooHR import per BambooHR account.

Once the import is completed, your organization chart is displayed by clicking on the **BACK TO THE ORGANIZATION CHART** button.

Find out more about the BambooHR integration in this video.

orginio listing

https://marketplace.bamboohr.com/listing/orginio/

Technical Information

- **Integration Type**: Unidirectional via API
- **Data direction**: BambooHR to orginio
- **Synchronization trigger**: Manual trigger by the orginio Administrator

For BambooHR only the person hierarchy is available. Which data are synchronized

BambooHR field	Field content
address1	Address of a person
bestEmail	Email of a person
city	City of a person
country	Country of a person
dateOfBirth	Date of birth of a person
department	Department of a person
displayName	Display name of a person from BambooHR
division	division of a person
employeeNumber	Personnel number
firstName	First name
gender	Gender
homeEmail	Private email address
id	Technical orginio ID
jobTitle	Job title of a person
lastName	Last name
location	Place of employment of a person
mobilePhone	Mobile phone number
photoUrl	Photo URL
status	Status of a person
supervisorEId	Hierarchy field
workEmail	Email address
workPhonePlusExtension	Work telephone number of a person
zipcode	Zip code of a person

See also

- Field Assignment [▸ 51]
- Import Filter [▸ 53]

2.4 Personio

To import data from Personio to orginio via the web interface, click the **IMPORT DATA** button in orginio and then select the **Personio** data source.

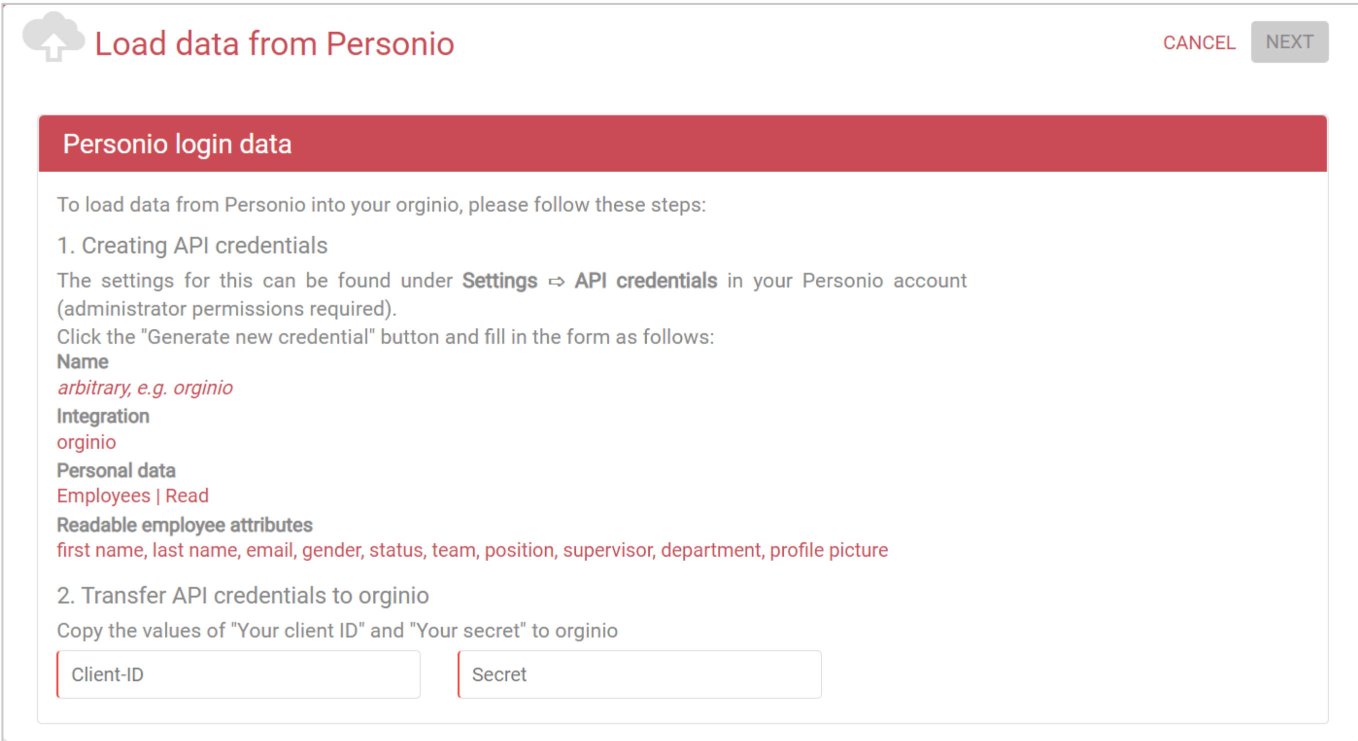


Fig. 33: Data Import - Personio

Before you can import data from Personio, API credentials must be created in your Personio account. To do this, follow the instructions in 1.) and then fill in the data in 2.) (Client ID as well as Secret).

The field assignment and the import filter can be adjusted. You can read more about this in the chapters Field Assignment [▸ 51] and Import Filter [▸ 53] .

For Personio, only the person hierarchy is available. Following data will be imported:

Personio	orginio
first_name	firstName
last_name	lastName
email	email
gender	gender
status	status
position	jobtitle
department.value.attributes.name	department
profile_picture	picture
team.value.attributes.name	team.label
subcompany.value.attributes.name	subcompany.label

2.5 HRworks

To import data from HRworks to orginio via the web interface, click the IMPORT DATA button in orginio and then select the HRworks data source.

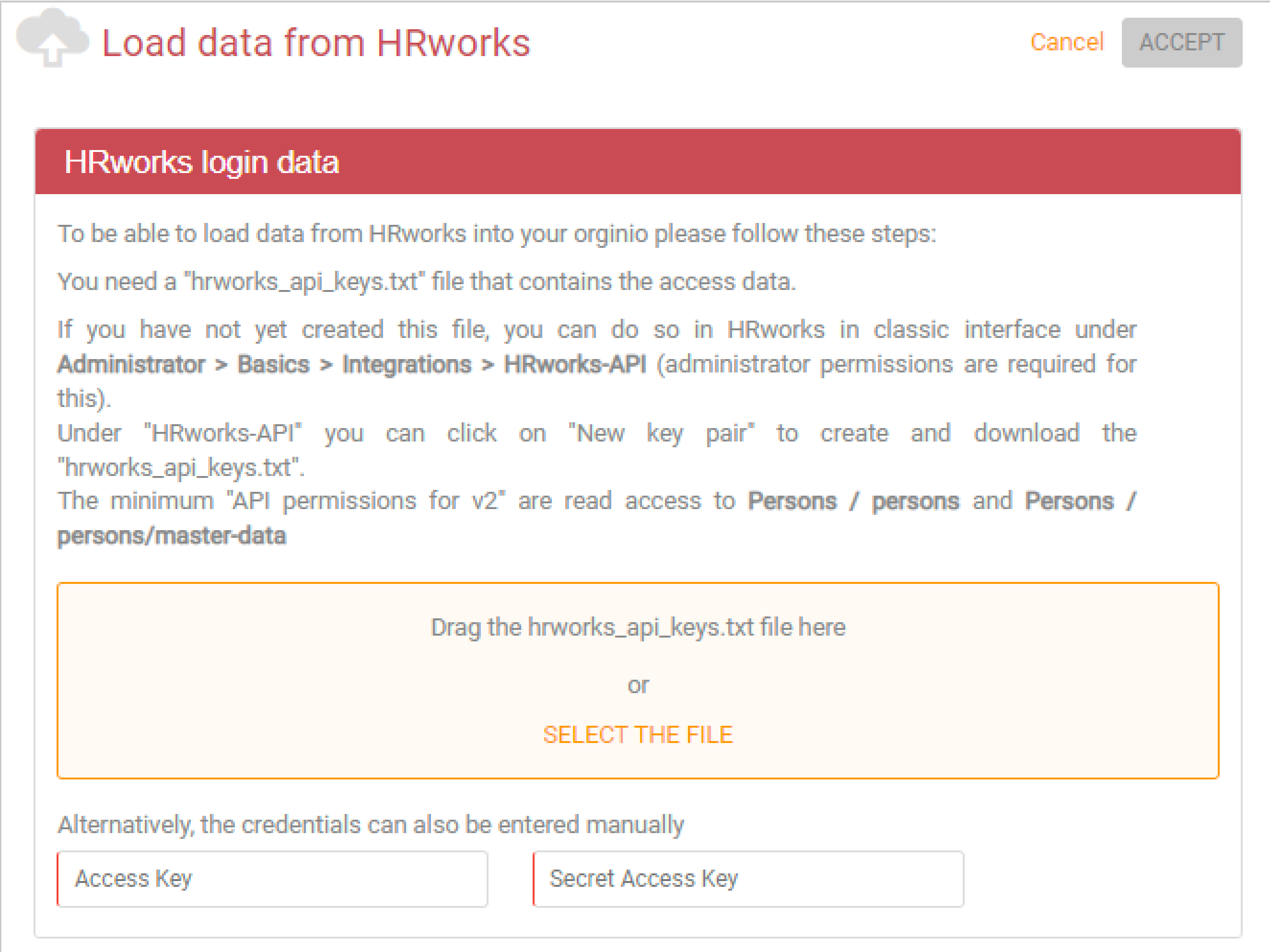


Fig. 34: HRworks - Data Import

Before you can import data from HRworks, a key pair must be stored. Follow the instructions in the import mask.

The field assignment and the import filter can be adjusted. You can read more about this in the chapters Field Assignment [▸ 51] and Import Filter [▸ 53] .

For HRworks, only the person hierarchy is available. Following data from HRworks will be imported:

HRworks	**orginio**
personnelNumber	Identifier
firstName	firstName
lastName	lastName
email	email
title	title
position	position
organizationUnit.name	Department
birthday	birthdate
companyMobilePhoneNumber	phoneNumbers.mobile
officePhoneNumber	phoneNumbers.office

2.6 UKG Ready

To import data from UKG Ready to orginio via the web interface, click on the **IMPORT DATA** button in orginio and then select the **UKG Ready** data source.

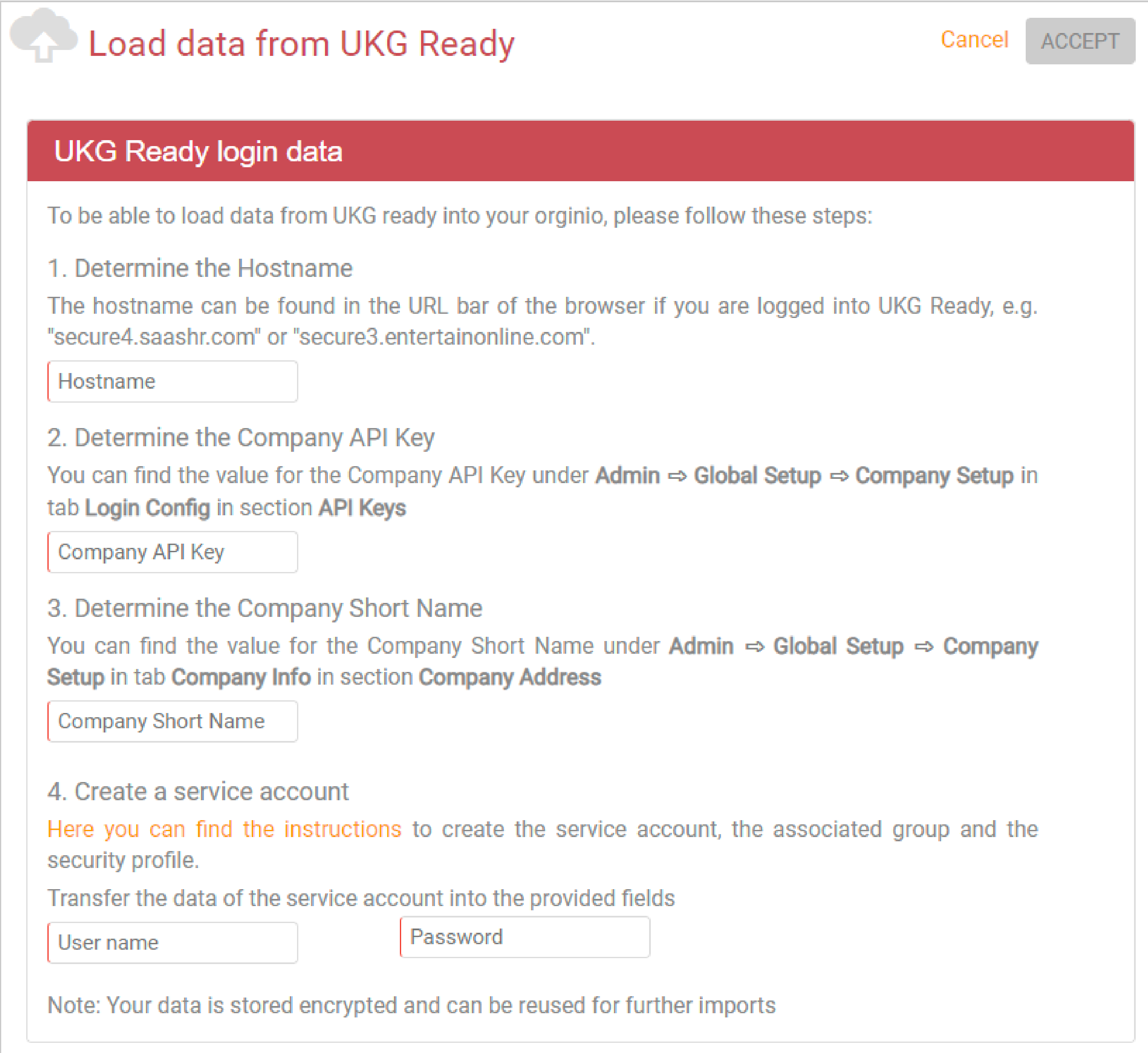


Fig. 35: Data Import - UKG Ready

Before you can import the data from UKG Ready, you must enter the host name in 1). Then you must determine the Company API Key in 2.) and 3.) determine the Company Short Name from your UKG Ready account. To do this, follow the instructions in orginio. Finally, you need to create a service account in UKG Ready. To do this, click on the link under 4.) for detailed instructions and follow the instructions. Once you have created the service account, enter the user name and password.

Fig. 36: Data Import - UKG Ready 2

After the registration data has been entered, you will be asked for the data scope. Here, persons with the status **not equal to active** can be imported from the data source by checking the box. In addition, the field to be evaluated for the organizational chart hierarchy must be selected. The field assignment and the import filter can be adjusted. You can read more about this in the chapters Field Assignment [▸ 51] and Import Filter [▸ 53] .The import is then carried out via the **IMPORT START** button at the top right.

For UKG Ready, only the person hierarchy is available. Following Data will be imported:

UKG Ready	**orginio**
First Name	firstname
Last Name	lastName
Primary Email	email
Country	custom.country
Employee Id	custom.employeeId
Account Id	identifier
Company: Name	custom.companyName
Full Work Phone	phoneNumbers
Address 1	custom.address1
Address 2	custom.address2
City	custom.city
Postal/Zip Code	custom.zipcode
Gender	gender
Employee Status	custom.status
Default Jobs (HR)	jobtitle
Manager X Account Id	parentPerson

2.7 UKG Pro

To import data from UKG PRO to orginio via the web interface, click on the **IMPORT DATA** button in orginio and then select the **UKG Pro** data source.

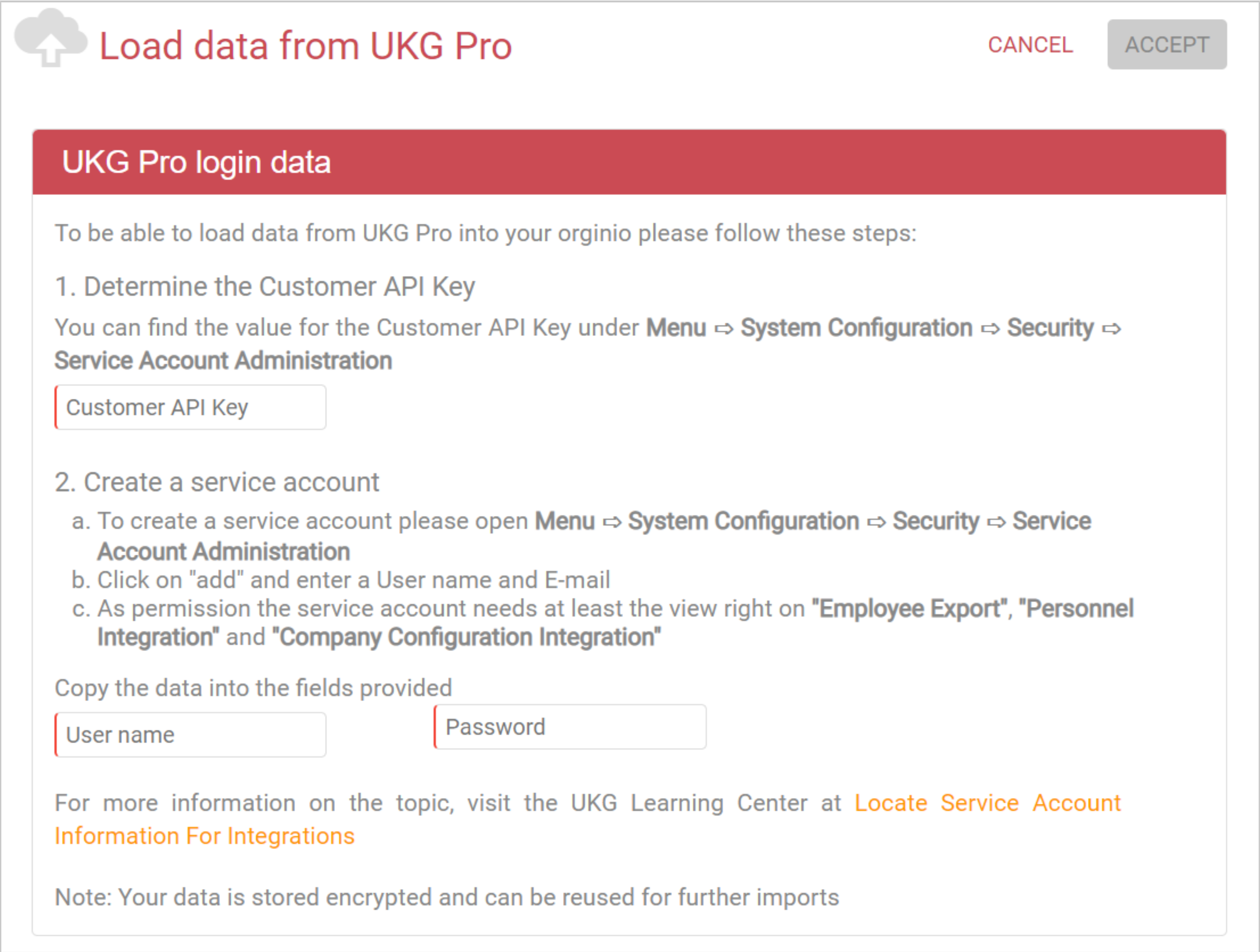


Fig. 37: Data Import - UKG Pro

Before you can import data from UKG Pro, you need to enter the Customer API Key from your UKG Pro account at 1.). Follow the instructions in orginio for this. After that you have to create a service account in UKG Pro as described in the instructions in 2.) and then enter the username and password.

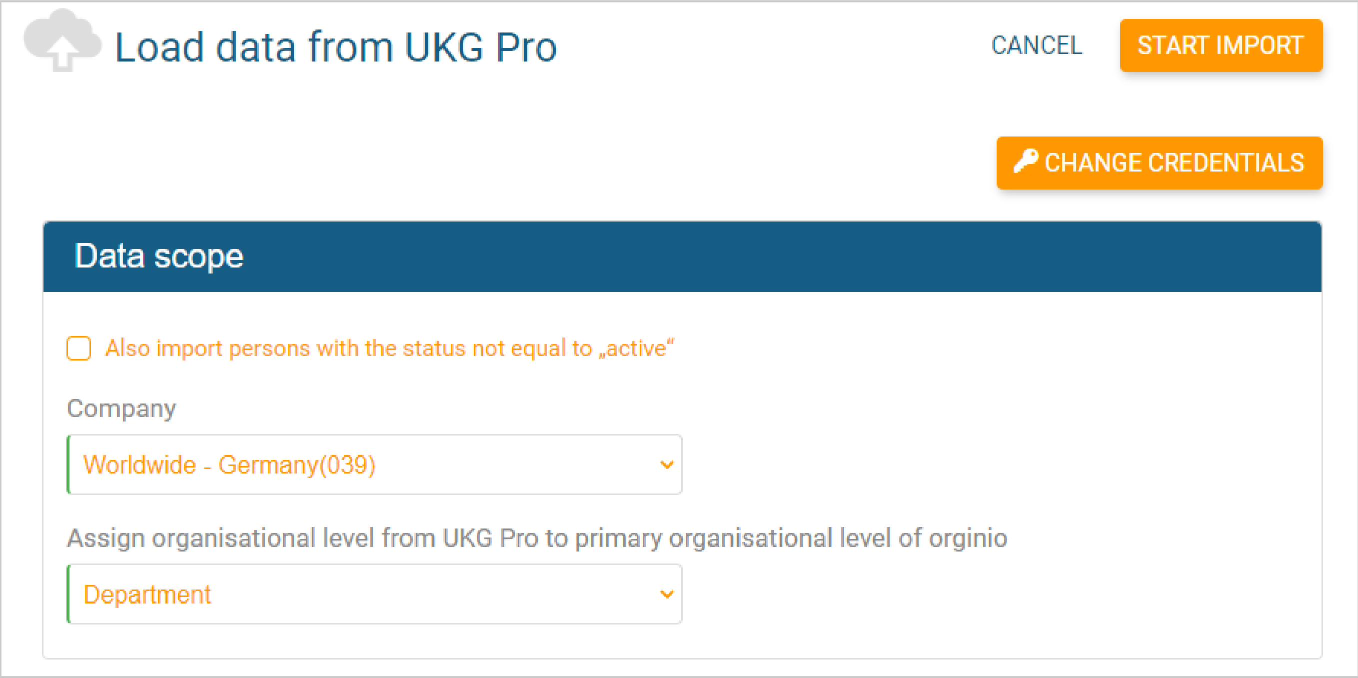


Fig. 38: Data Import - UKG Pro 2

After the credentials have been entered, you will be asked for the data scope. Here, persons **with the status not equal to active** can be imported from the data source by ticking them. In addition, **the company** as well as the organization level of UKG Pro must be selected, which serves as the first level for the organization chart in orginio. The field assignment and the import filter can be adjusted. You can read more about this in the chapters Field Assignment [▸ 51] and Import Filter [▸ 53] .The import is then carried out via the **START IMPORT** button at the top right.

For UKG Pro, only the person hierarchy is available. Following Data will be imported:

UKG Pro	**orginio**
firstName	firstName
lastName	lastName
emailAddress	email
countryCode	custom.country
employeeNumber	custom.employeeNumber
employeeId	identifier
companyName	custom.companyName
supervisorId	parentPerson
workPhone	phoneNumbers.work
employeeAddress1	custom.address1
employeeAddress2	custom.address2
city	custom.city
zipCode	custom.zipcode
gender	gender
employeeStatus	custom.status
jobDescription	jobtitle

2.8 UKG Dimensions

To import data from UKG Dimensions to orginio via the web interface, click on the **IMPORT DATA** button in orginio and then select the **UKG Dimensions** data source.

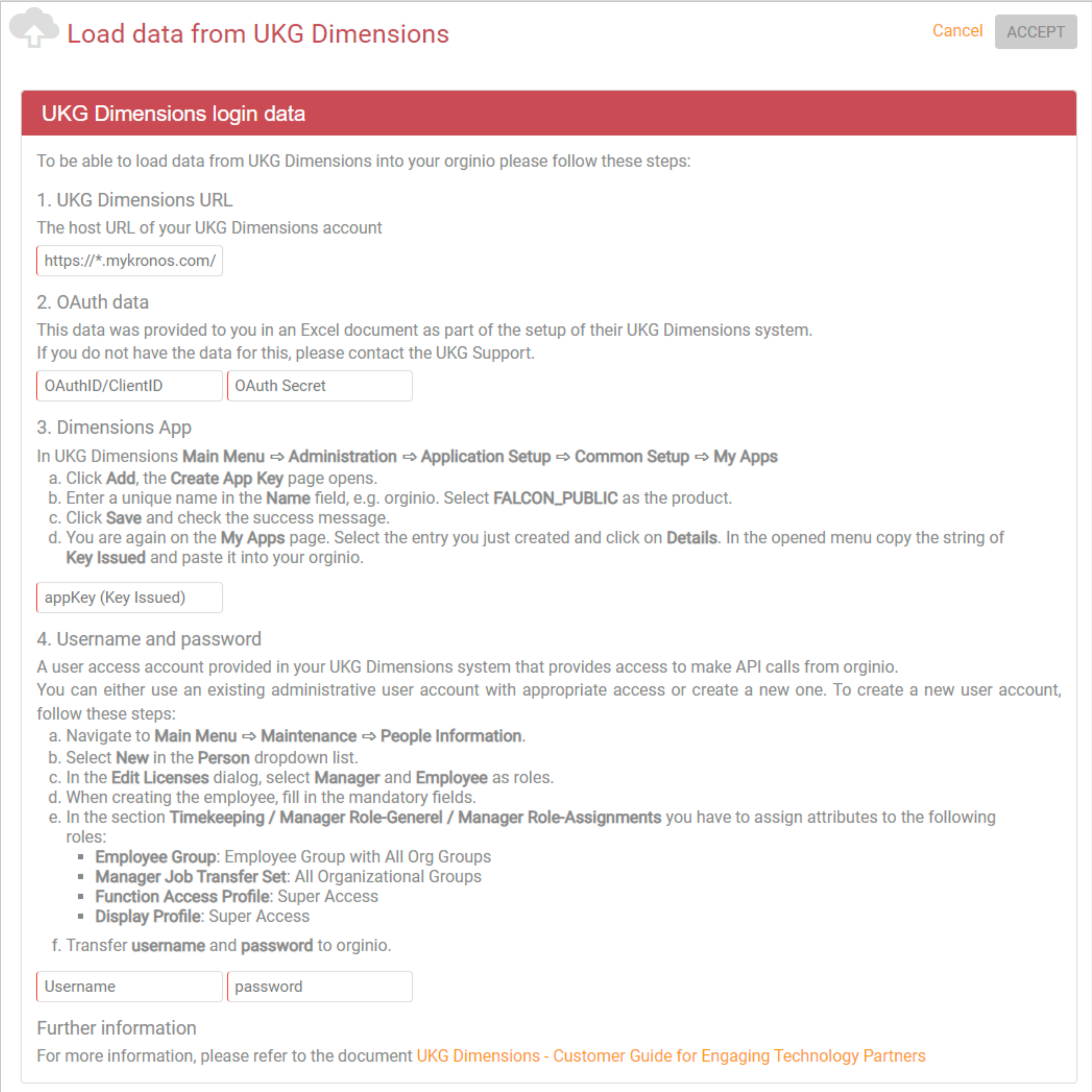


Fig. 39: UKG Dimensions - Data import

Before you can import data from UKG Pro, you must enter the UKG Dimensions URL in 1.) and the OAuth authentication data supplied by UKG as an Excel file in 2.). For 3.) the appKey from the Dimensions app must be deposited. Follow the instructions on the screen. Then, in 4), the user name and password must be entered. Follow the instructions on the screen.

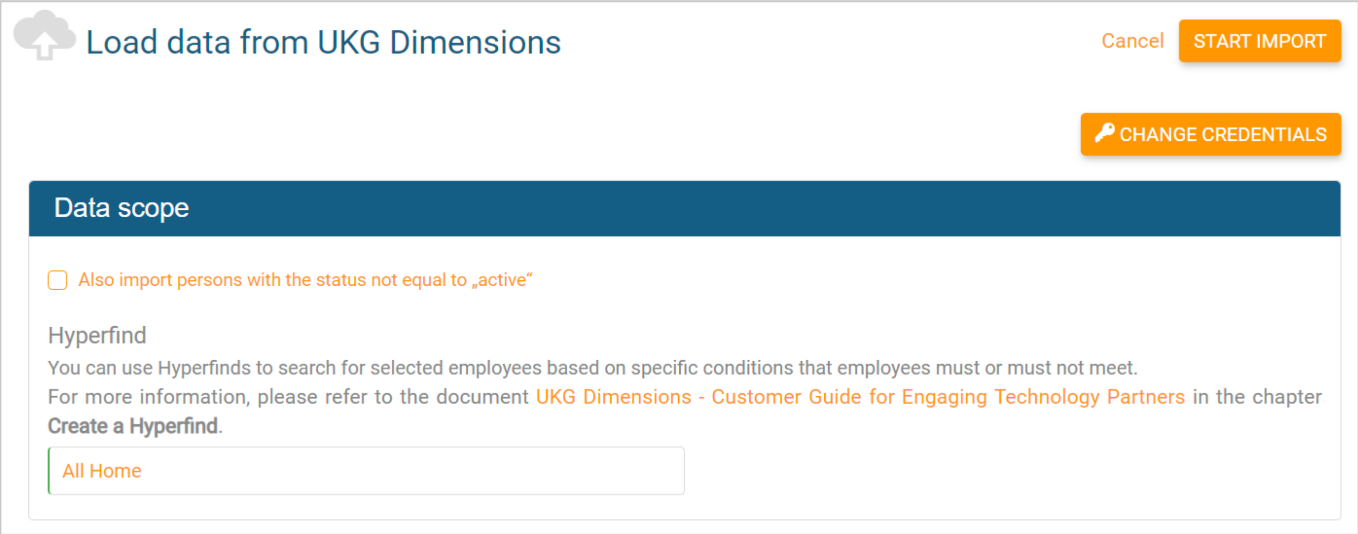


Fig. 40: UKG Dimensions - Data scope

After the login data has been entered, you will be asked for the scope of data. Here, persons with the status not equal to active can be imported from the data source by ticking the box. Hypefinds must also be selected. Follow the instructions on the screen to do this. The import is then carried out via the IMPORT START button at the top right.

Following data will be imported from UKG Dimensions to orginio:

Person Hierarchy

Dimensions	**orginio:**
EMP_COMMON_FULL_NAME	displayName
EMP_COMMON_PRIMARY_JOB_TITLE	jobtitle
EMP_COMMON_PRIMARY_ORG	department
PEOPLE_ADDRESS_CITY_WORK	custom.address-city
PEOPLE_ADDRESS_COUNTRY_WORK	custom.address-country
PEOPLE_ADDRESS_STATE_WORK	custom.address-state
PEOPLE_ADDRESS_STREET_WORK	custom.address-street
PEOPLE_ADDRESS_ZIPCODE_WORK	custom.address-zipcode
PEOPLE_BIRTH_DATE	birthdate
PEOPLE_EMAIL	email
PEOPLE_EMP_STATUS	custom.status
PEOPLE_FIRST_NAME	firstName
PEOPLE_LAST_NAME	lastName
PEOPLE_PERSON_ID	custom.objectId
PEOPLE_PERSON_NUMBER	identifier
PEOPLE_PERSON_NUMBER_MANAGER	parentPerson > identifier
PEOPLE_PHONE_NUMBER	phoneNumbers > work
PEOPLE_PHONE_NUMBER2	phoneNumbers > mobile
PEOPLE_WORKER_TYPE	custom.worker-type

Department Hierarchy

Object type	Dimensions	orginio	
Unit	location.nodeId	custom.technical-id	
Unit	location.persistentId	custom.objectId	
Un	location.fullName	displayName	
Position	location.persistentId	custom.objectId	
Position	location.fullName	displayName	
Position	location.orgPath	custom.orgPath	
Person	PEOPLE_PERSON_ID	custom.objectId	
Person	PEOPLE_PERSON_NUMBER	identifier	
Person	PEOPLE_EMAIL	email	
Person	PEOPLE_EMP_STATUS	custom.status	
Person	PEOPLE_FIRST_NAME	firstName	
Person	PEOPLE_LAST_NAME	lastName	
Person	PEOPLE_BIRTH_DATE	birthdate	
Person	PEOPLE_PHONE_NUMBER	phoneNumbers.work	
Person	PEOPLE_PHONE_NUMBER2	phoneNumbers.mobile	
Person	PEOPLE_WORKER_TYPE	custom.worker-type	
Person	EMP_COMMON_FULL_NAME	displayName	
Person	PEOPLE_ADDRESS_CITY_WORK	custom.address-city	
Person	PEOPLE_ADDRESS_COUN-TRY_WORK	custom.address-country	
Person	PEOPLE_ADDRESS_STATE_WORK	custom.address-state	
Person	PEOPLE_ADDRESS_STREET_WORK	custom.address-street	
Person	PEOPLE_ADDRESS_ZIPCODE_WORK	custom.address-zipcode	

2.9 Profile Pictures

To import pictures (as ZIP file), drag these either into the dotted box or open the file via the Explorer by clicking on **Select the file**.

Under "What field shall we compare the filename in the ZIP file with" we define which data field the profile images should be assigned to. The names of the photos have to match the contents of the data fields. The personnel number is normally used for this.

To obtain an example for the name of the pictures in this ZIP file, click on **download here**. After that, the download starts with a demo Zip file with pictures.

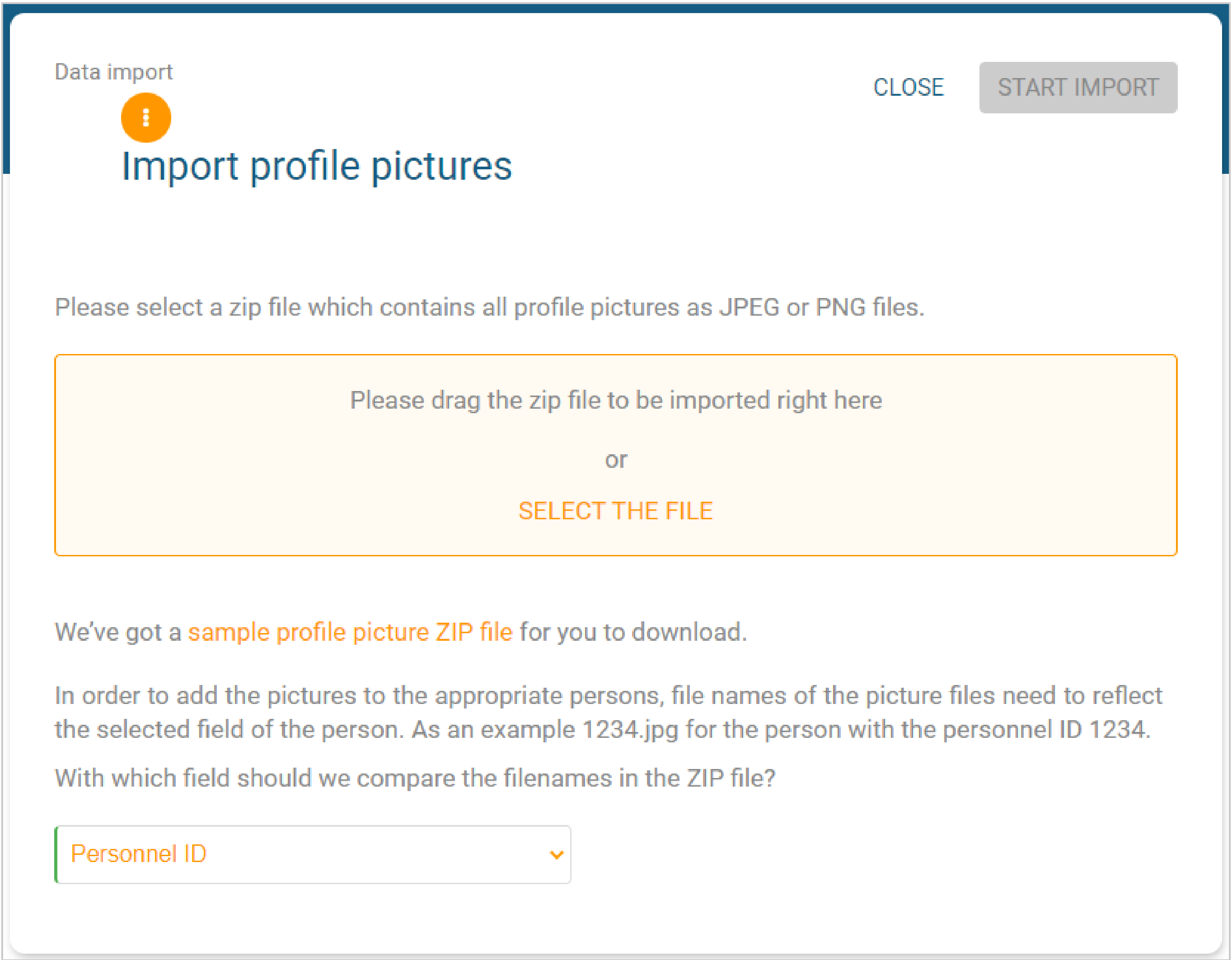


Fig. 41: Data Import - profile pictures

2.10 Data Schema

A data schema contains the data field types (see Schema [▸ 87]) of an orginio account. These data field types are added to existing data field types by importing a data schema. Thus, in the case of multiple subsidiaries each with their own orginio accounts, it is possible to create one initial schema in an orginio account and to transfer this to all other accounts by export/import.

It should be noted that the data schema file contains the data field types but no data field contents. Existing data fields are not overwritten during an import.

To import a data schema, drag the corresponding JSON file either into the dotted box or select the file via the Explorer. To select the file via the Explorer, click on **Select the file**.

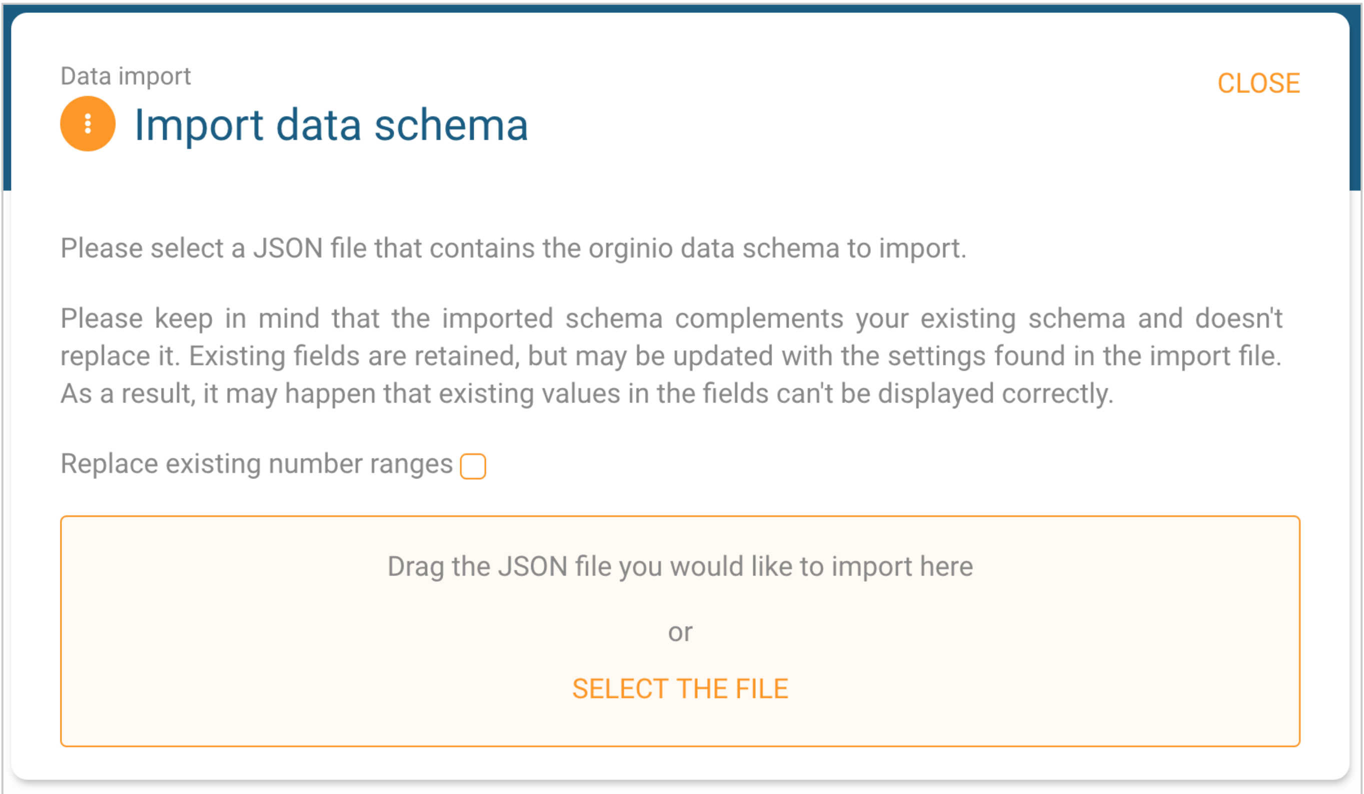


Fig. 42: Data Import - Schema File

You can read about the procedure for generating a data schema in chapter Download [▸ 86].

2.11 File Attachments

Corresponding files can be uploaded here for data fields of type files.

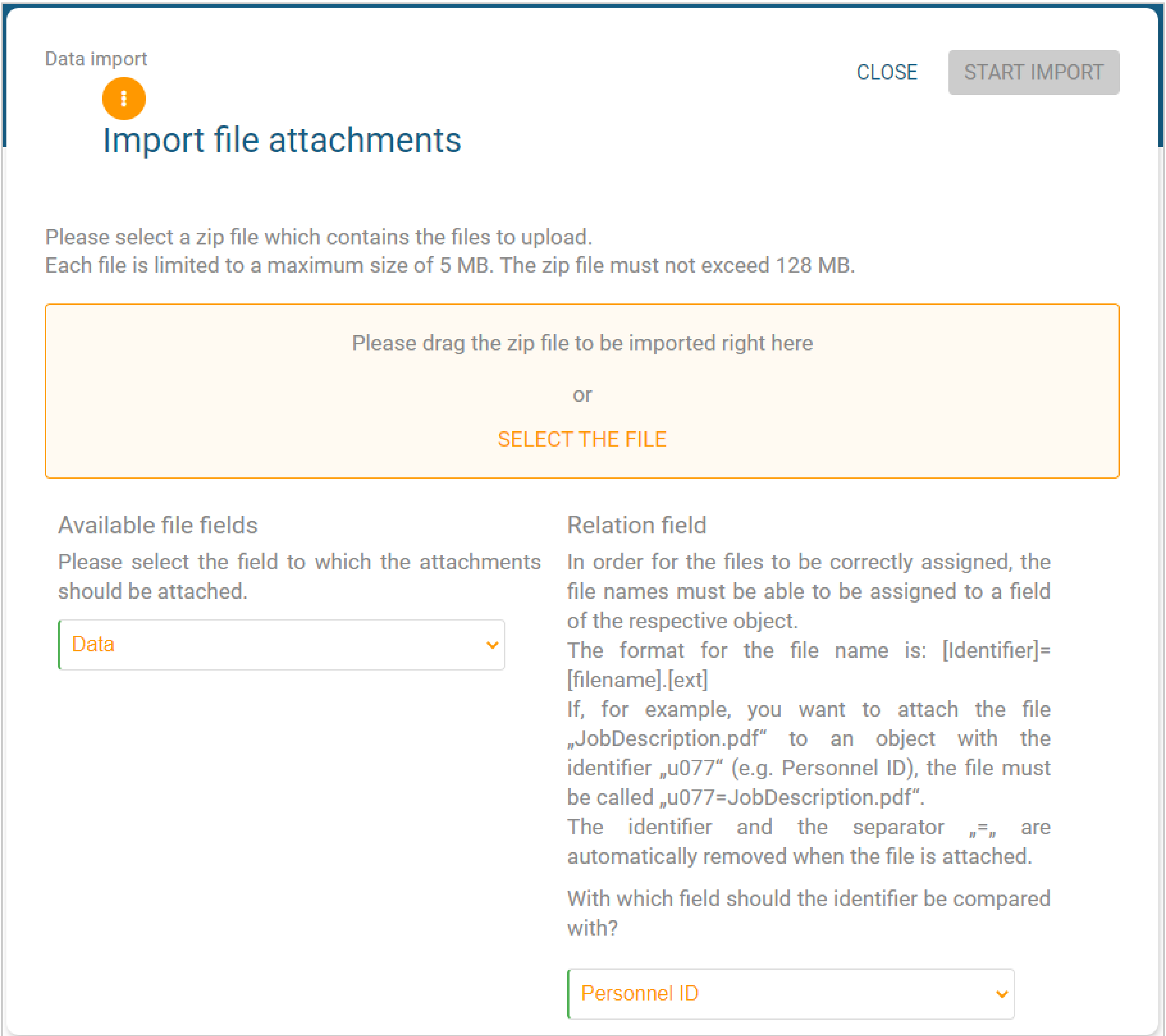


Fig. 43: Data Import - File Attachments

2.12 ADP

The predefined ADP orginio interface can only be used if orginio is started via the ADP Marketplace. If orginio is started via the ADP Marketplace, the data can be retrieved directly from the ADOP. The organization chart is created automatically with the existing information from the ADP Workforce Now or ADP Vantage HCM.

Starting Test Version from the orginio Listing in the ADP Marketplace

Log into Marketplace and search for orginio. Then select orginio for Workforce Now or orginio for Vantage HCM and click on the **START A FREE TRIAL** button.

To view all feature sets and prices, click on the **Choose an edition to purchase** link. Then select the appropriate feature set for your organization and click on the **Try for 30 Days** button. Confirm the **Consent Request** dialog. Afterwards, the orginio app is displayed in the **MY APPS** menu.

Importing data from ADP

Start orginio from the area **MY APPS** in the ADP Marketplace. Click on the **LOAD YOUR DATA FROM ADP** button to use the interface that generates your organization chart automatically with the data from ADP Workforce Now or ADP Vantage HCM. Once the import process is completed, click on the **BACK TO YOUR ORG CHART** button.

Find out more about the ADP Integration in these videos

https://www.youtube.com/watch?v=yw3p9QS8hRo

https://www.youtube.com/watch?v=Ihv5zffNQa8

orginio listings

https://apps.adp.com/apps/147519#!overview

https://apps.adp.com/apps/154394#!overview

Technical Information

Integration Type: Unidirectional via API

Data direction: ADP to orginio

Synchronization trigger: Manual trigger by the orginio Administrator

Which data are synchronized

ADP field
Associate OID
Worker ID
Legal Name (First Name; Family Name)
Preferred Name (technical: Nick Name)
Email
Landlines
Mobile
Gender
Photo
Reports To
Job Title

Business Unit (Home Organizational Units)
Department (WFN: Home Organizational Units; Vantage: Assigned Organizational Units)
Assigned Work Locations (technical: Name Code)

2.13 Field Assignment

When importing from an AzureAD, BambooHR, HRworks, UKG Ready/Pro or Personio data source, default fields are automatically assigned. However, additional fields can be added for import and the default fields and their mapping can be customized in orginio. For this a mask is available before the import, in which on the left side the field names to be imported from the data source stand and on the right side their assignment in orginio.

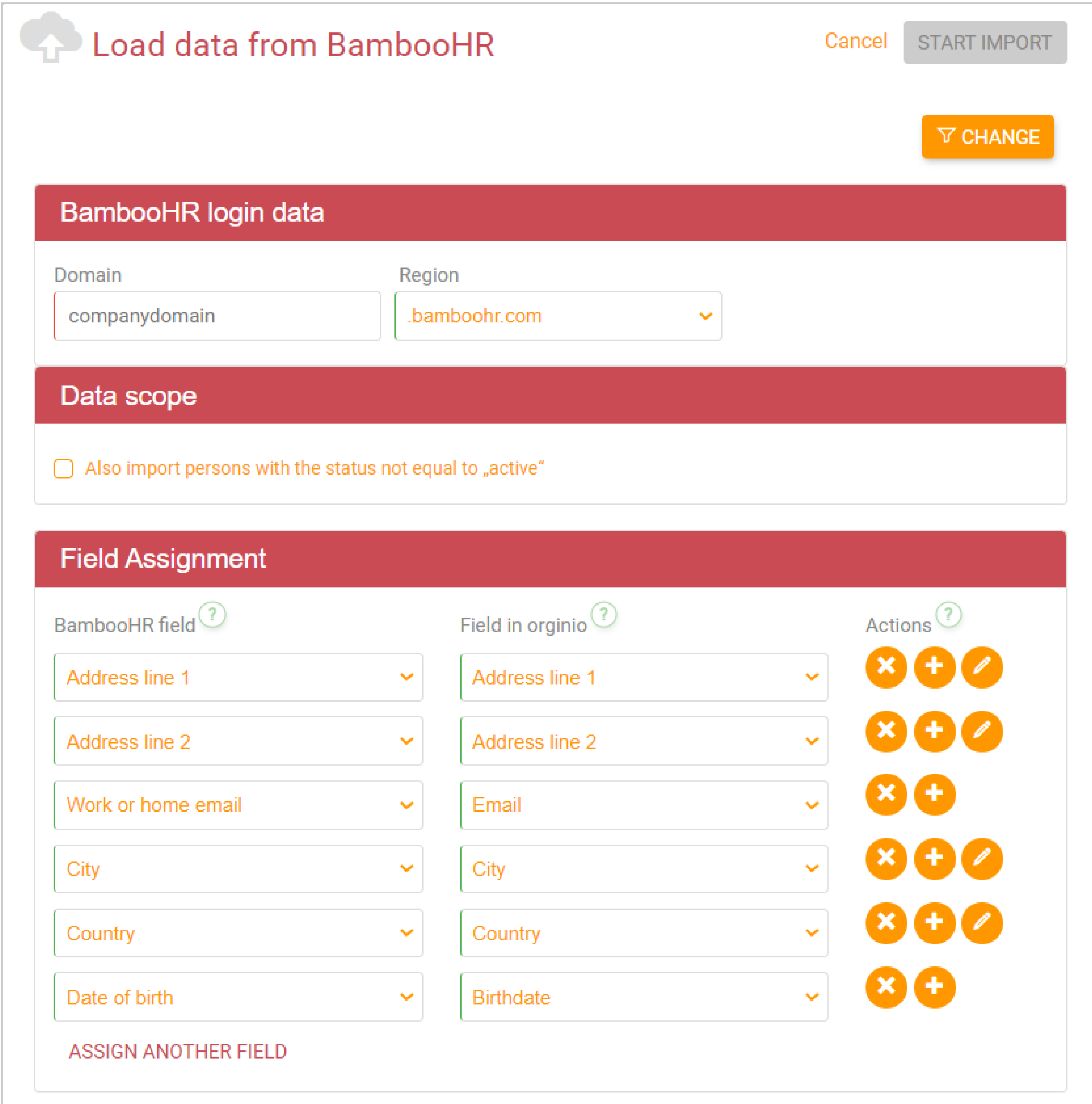


Fig. 44: Fieldmapping

With the X button assignments are deleted and with the + button a new field can be created for orginio. The Assign another field button is used to create new fields. Created fields for orginio can be edited using the pencil button.

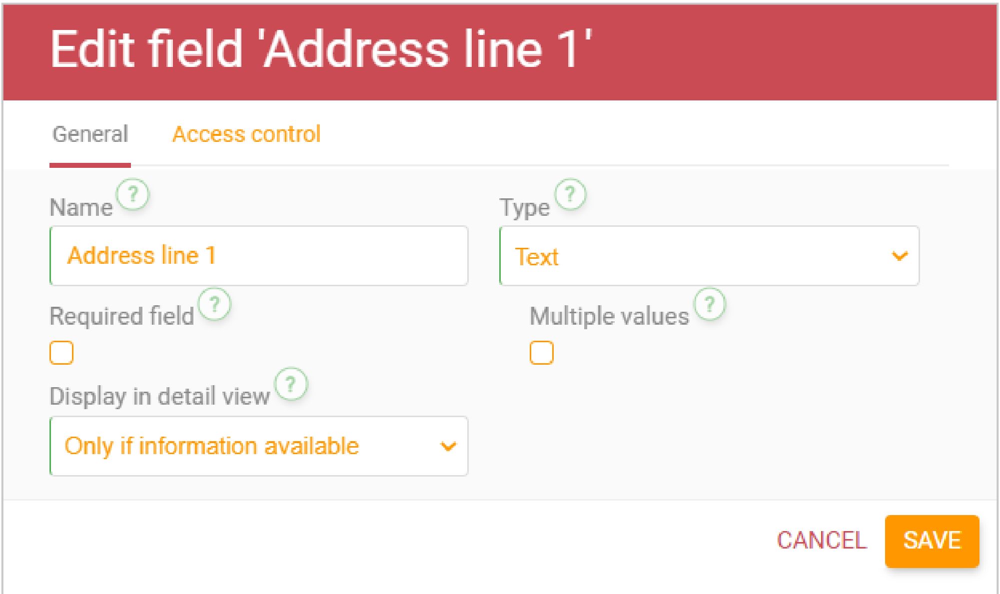


Fig. 45: Fieldmapping - Settings

When creating or editing a field for orginio, the following properties can be customized:

- **Name:** Here you can enter the name of the field in orginio.
- **Type:** Here is determined, about which content the field to be imported has. The following can be selected:
  - **Auto-increment number range**: each newly created object automatically receives a unique value, which is set via the "Number range" tab. Attention: The field values from the source are not taken over!
  - **Date:** The field contains a calendar date.
  - **Yes/No:** The field contains either a Yes or a No or a 0 or a 1.
  - **Text:** The field contains alphanumeric values.
  - **Value range:** Selection field with alphanumeric values already stored. The values for the selection are stored either manually or as an Excel file in the Value range tab.
  - **Number:** The field contains numerical values.
- **Mandatory field:** Is checked if a field should always be filled in for manually inserted objects. However, this does not affect the import. After an import, the field can also be empty.
- **Multiple values**: Is checked if multiple values should be stored for the field.
- **Display in detail view:** Here you can determine if the field should be displayed in a detail view. The following options are available:
  - **Only if information is available:** Field is only displayed in a detail view if it has content.
  - **Always visible in edit mode:** Field is always displayed in edit mode.
  - **Always visible in viewing mode:** Field is always visible in display mode.
  - **Always visible:** Field is always visible in all modes.

In the Access Control tab (more on permissions in the Access Control chapter [▸ 121]) you can set for each field to be imported who can see or edit the field.

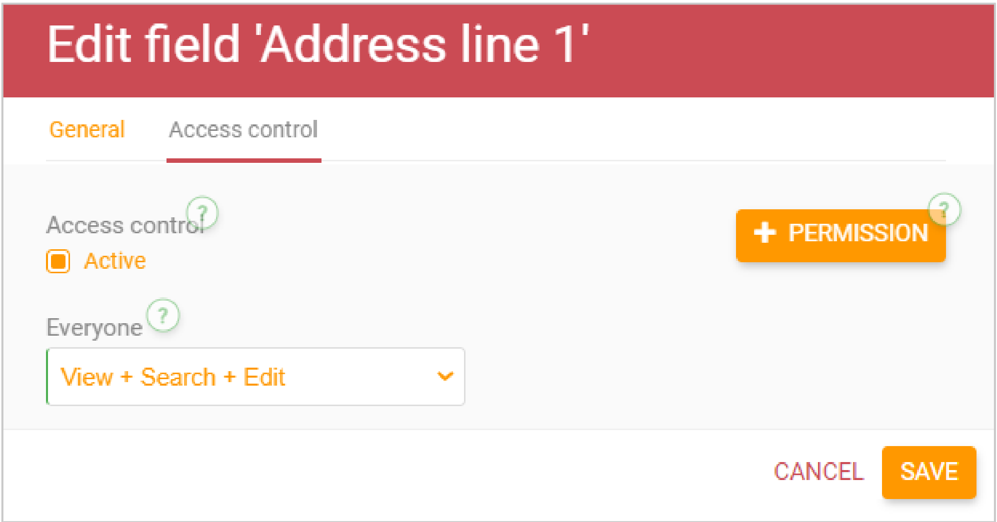


Fig. 46: Fieldmapping - Access Control

- **Access Protection:** if checked, access protection is enabled for the field.
- **Permission:** This is where permissions are created on the field for groups or individuals. The created permissions are displayed to the right of Everyone.
- **Everyone:** Here you can set which permissions all persons (i.e. those not included in Permission) have on the field.

2.14 Import Filter

When using an AzureAD, BambooHR, Personio, HRworks, UKG Ready/Pro data source, import filters can be set to ensure that certain data is not imported.

Attention: The import filters have no influence on other already existing data in orginio!

The mask for the import filters can be reached via the settings of the respective data import by pressing the button **Change** in the upper area.

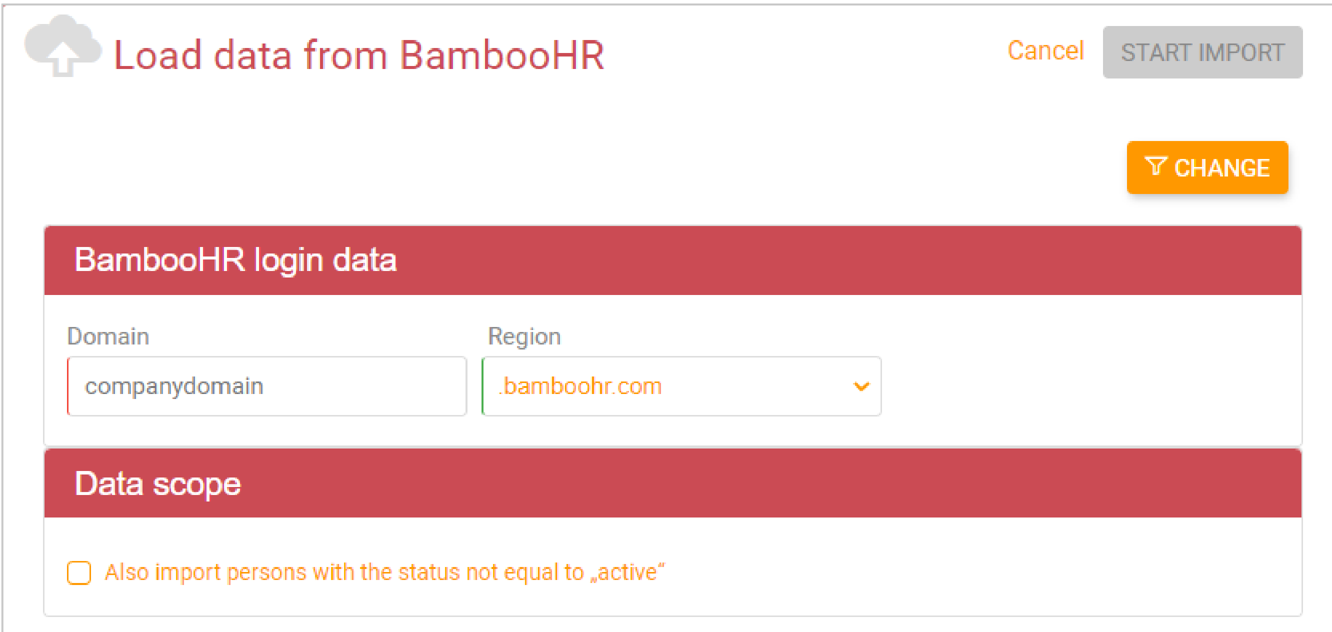


Fig. 47: Filter - Button

In the mask, there are three methods to choose from, how to proceed with child elements, if the parent elements are not transferred by the import filter.

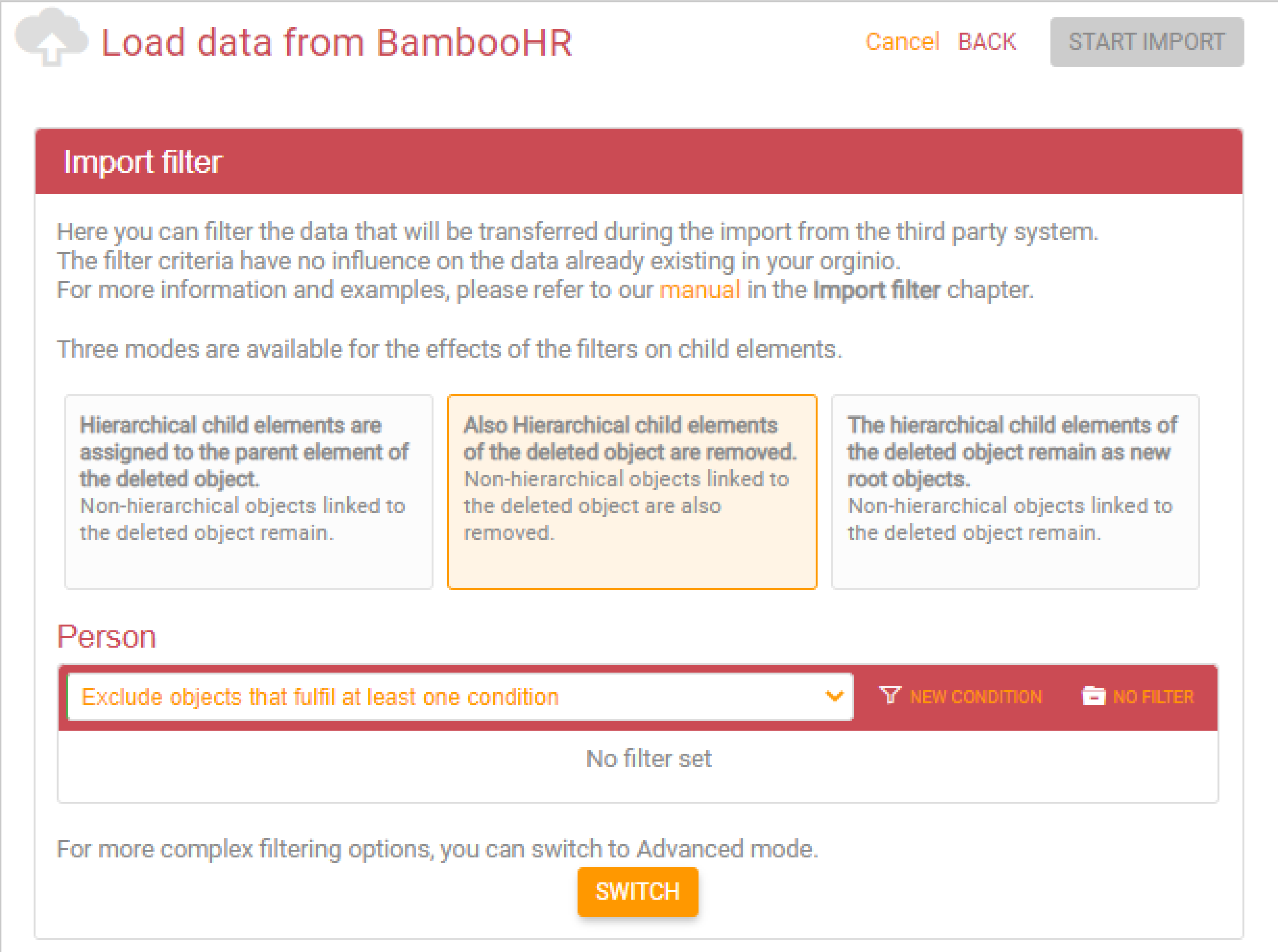


Fig. 48: Import filters - Simple mode

The following is available for selection:

- **The children are assigned to the parent object of the filtered object:** The linked non-hierarchical objects remain (but the link to the deleted object is removed).
- **Hierarchical child elements of the filtered object are also removed**: all children and children's children are not transferred; neither are the linked non-hierarchical objects (such as position and assigned employees).
- **The children of the filtered object remain as new root objects:** The children and linked non-hierarchical objects persist (but the link to the untransferred object is removed).

Note: Non-hierarchical objects exist only in department as well as position hierarchies.

Example

To illustrate the three methods, here is an example in which external employees are not imported due to an import filter.

1. **Without import filter.** Ben Kinnig (here in orange) is an external employee with three assigned employees.

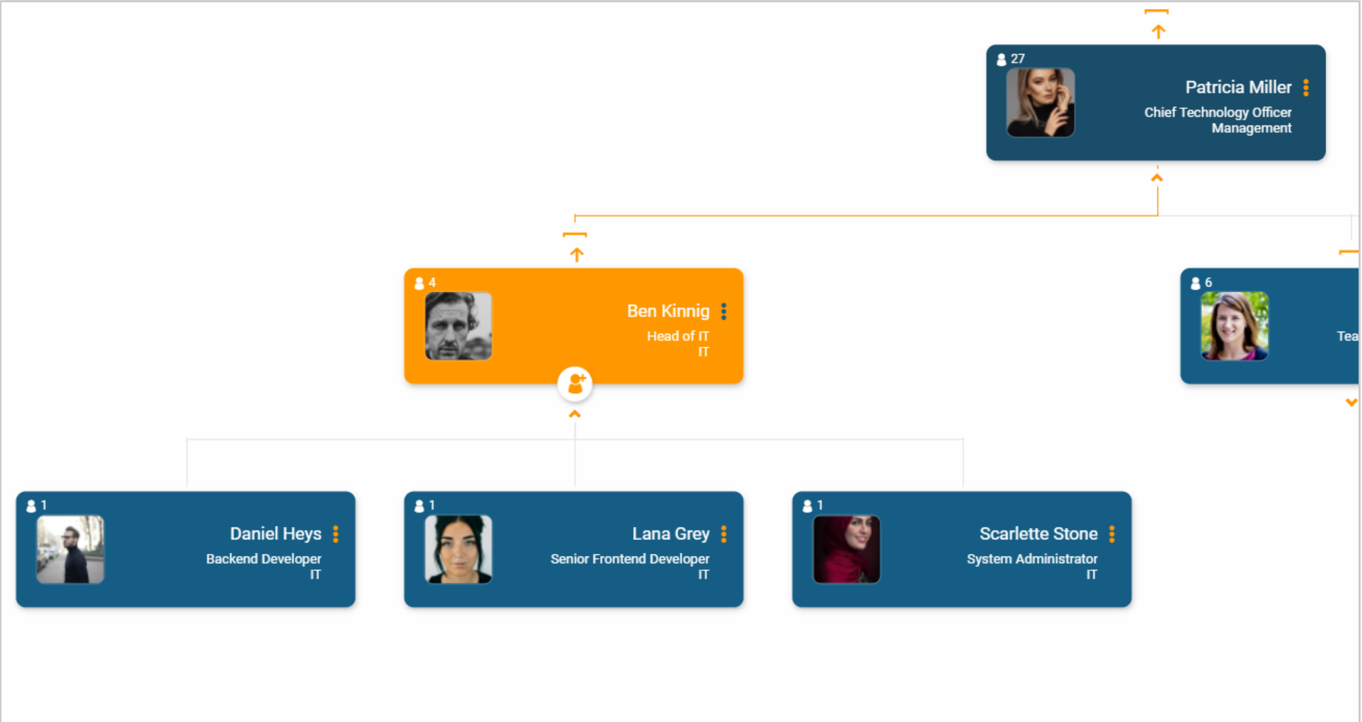


Fig. 49: Example - without filter

2. **The children are assigned to the parent object of the filtered object:** External employees like Ben Kinnig are not transferred by the import filter. Here the children are assigned to the parent object of the filtered object, in this case Patricia Miller.

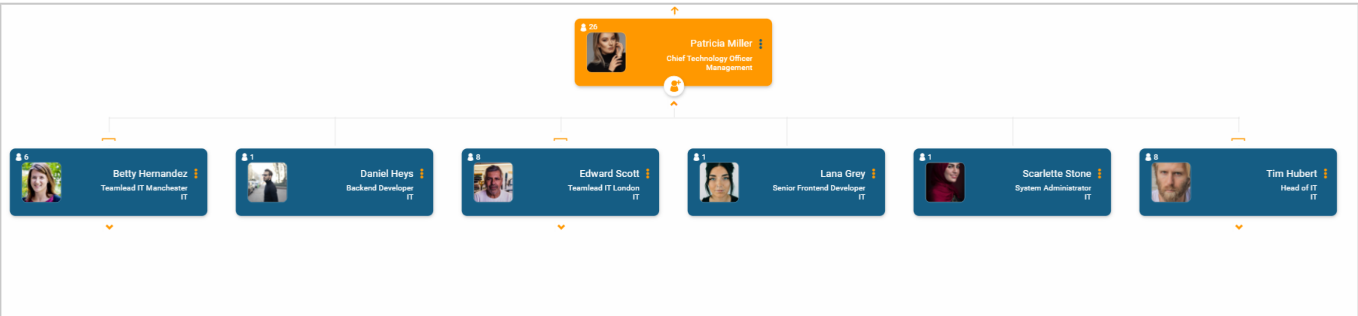


Fig. 50: Example - Child elements are assigned to parent elements

3. **Hierarchical child elements of the filtered object are also removed:** External employees like Ben Kinnig are not transferred by the import filter. The three child elements are removed from the organization chart.

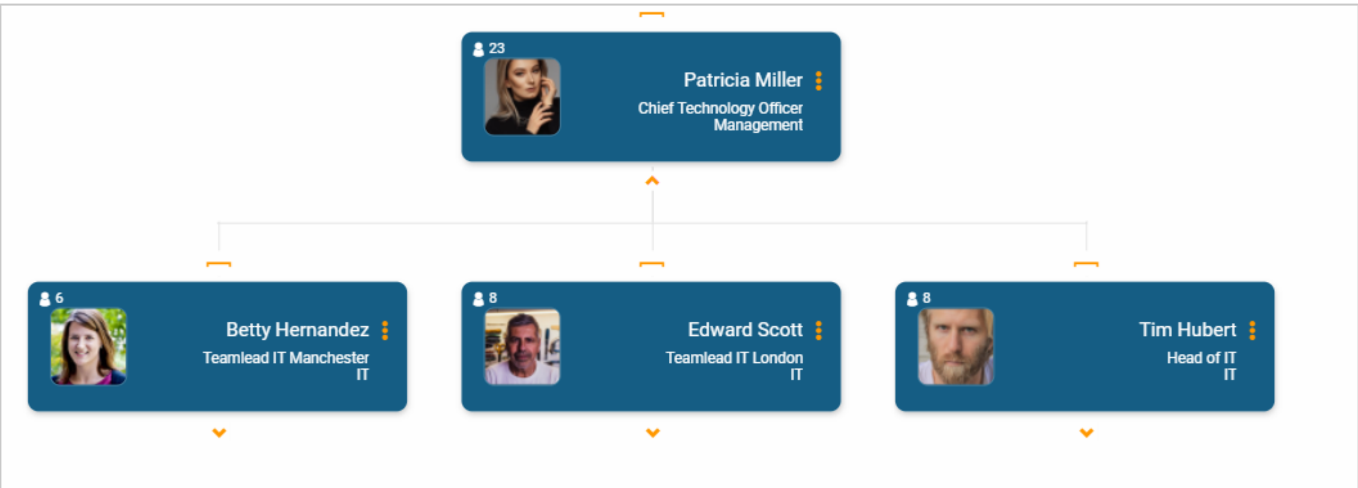


Fig. 51: Example - Child elements are removed

4. **The children of the filtered object remain as new root objects:** External employees like Ben Kinnig are not transferred by the import filter. The three child elements remain in the organization chart.

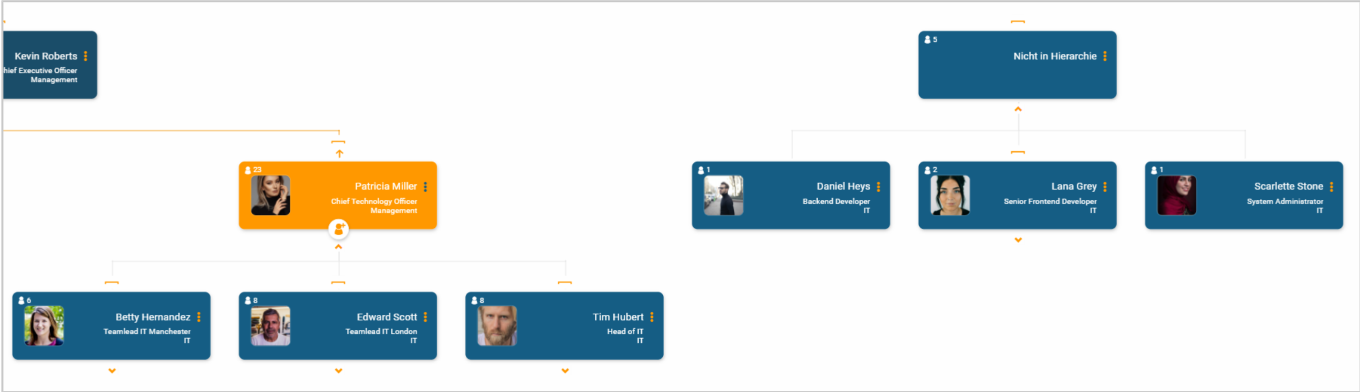


Fig. 52: Example - Child elements as new objects

Create conditions

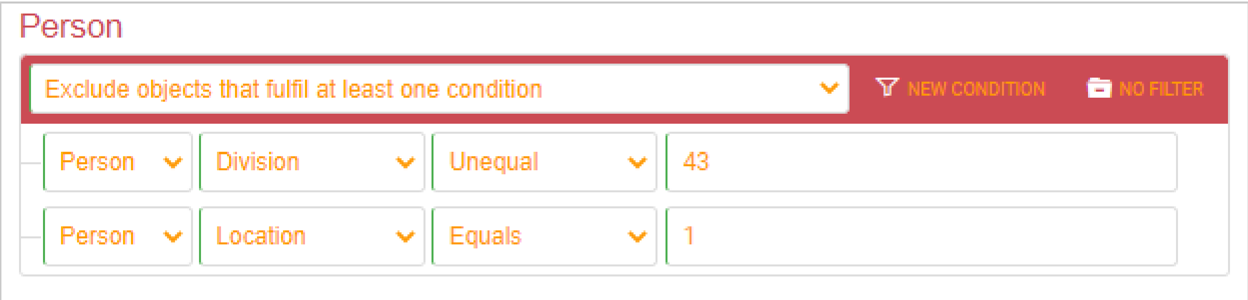


Fig. 53: Creating conditions

Conditions can be created by pressing the New Condition button. A total of up to 100 conditions can be created. It is necessary to define what happens when conditions are met:

- **Exclude objects that fulfil all conditions**: Only if all created conditions are true, the object will be excluded for import.
- **Exclude objects that fulfil at least one condition:** If only one of the created conditions is true, the object will be excluded for import.
- **Keep objects that fulfil all conditions:** Only if all created conditions are true, the object will be imported.
- **Keep objects that fulfil at least one condition:** If only one of the created conditions is true, the object will be imported.

To create a condition, select an object type and an attribute and select a relational operator. Then enter a filter text. Attention: The filter text is case sensitive!

! Depending on the data type, different comparison operators are available. For example, operators such as "Equals" or "Contains" are available for text fields, and relative operators can also be used for date fields in order to use time periods in relation to the current date.

The Toggle button at the bottom of the mask can be used to switch on an advanced mode. In the advanced mode, condition groups can be created. Up to 50 groups can be created in total. In addition, a group can contain up to eight additional condition groups. Attention: When reversing to the simple mode, all created groups will be deleted.

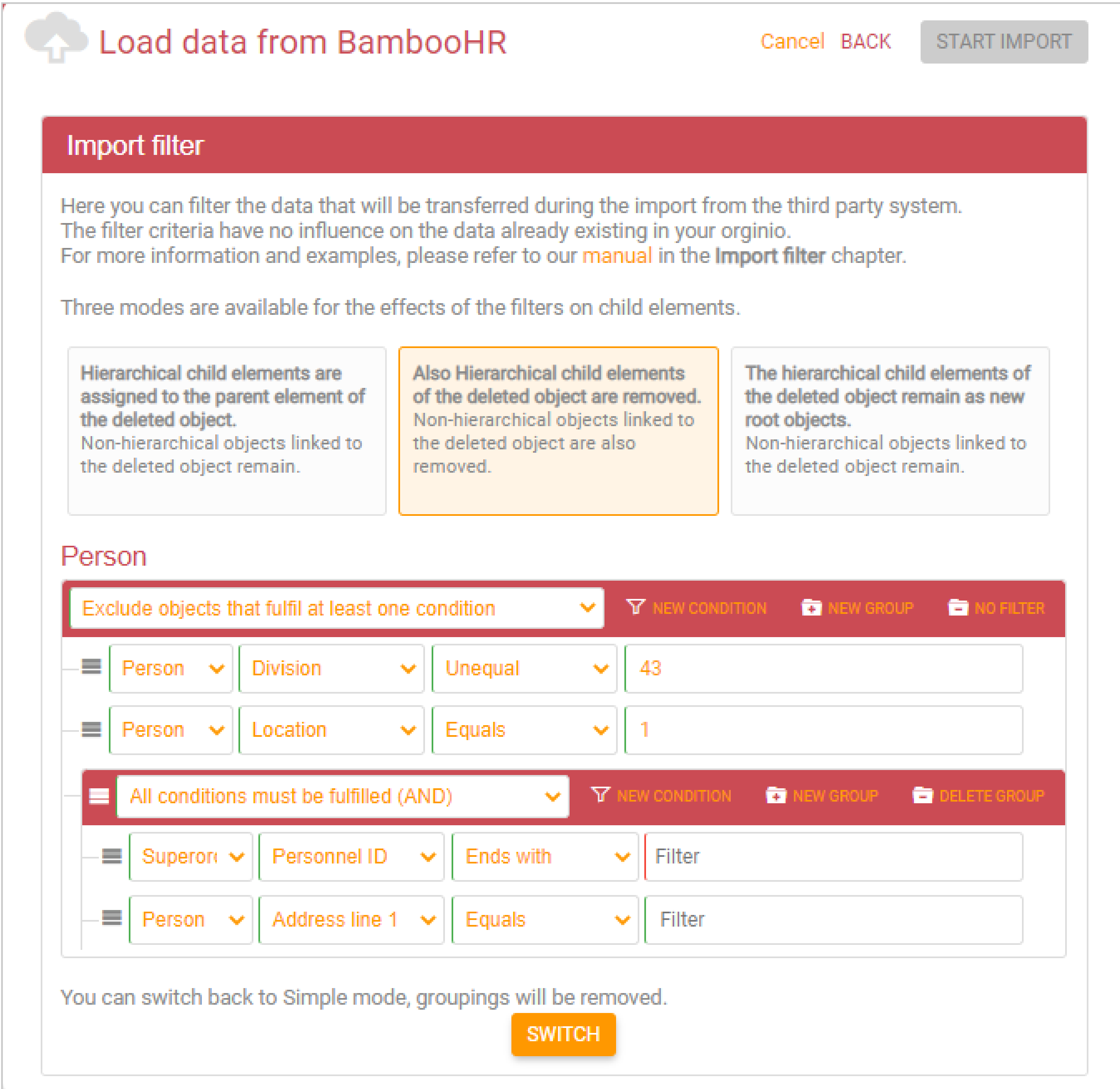


Fig. 54: Import filter - Advanced mode

For a condition group, it is also set from when it takes effect. The following is available for selection:

- **All conditions must be fulfilled:** Only if all conditions of the group are fulfilled, the condition group is considered as fulfilled.
- **One condition must be fulfilled:** If only one of the conditions of the group applies, the condition group is considered to be fulfilled.
- **All conditions must not be fulfilled:** Only if all conditions of the group do not apply, the condition group is considered fulfilled.
- **One condition may not be fulfilled:** If only one condition is not true, the condition group is considered fulfilled.

When all desired conditions have been created, the data import can be triggered via the **Start import** button. The created conditions are saved.

II Structure of the Interface

The edit mode consists of the organization chart itself, the **multifunctional bar**, the **position display** and the **settings bar**. In addition, the **Undo** and **Redo** buttons appear.

1. Organization chart

The organization chart boxes contain different information depending on the structure selected (see Data [▸ 84]).

To open and close substructures again, click on the arrow button below the corresponding object.

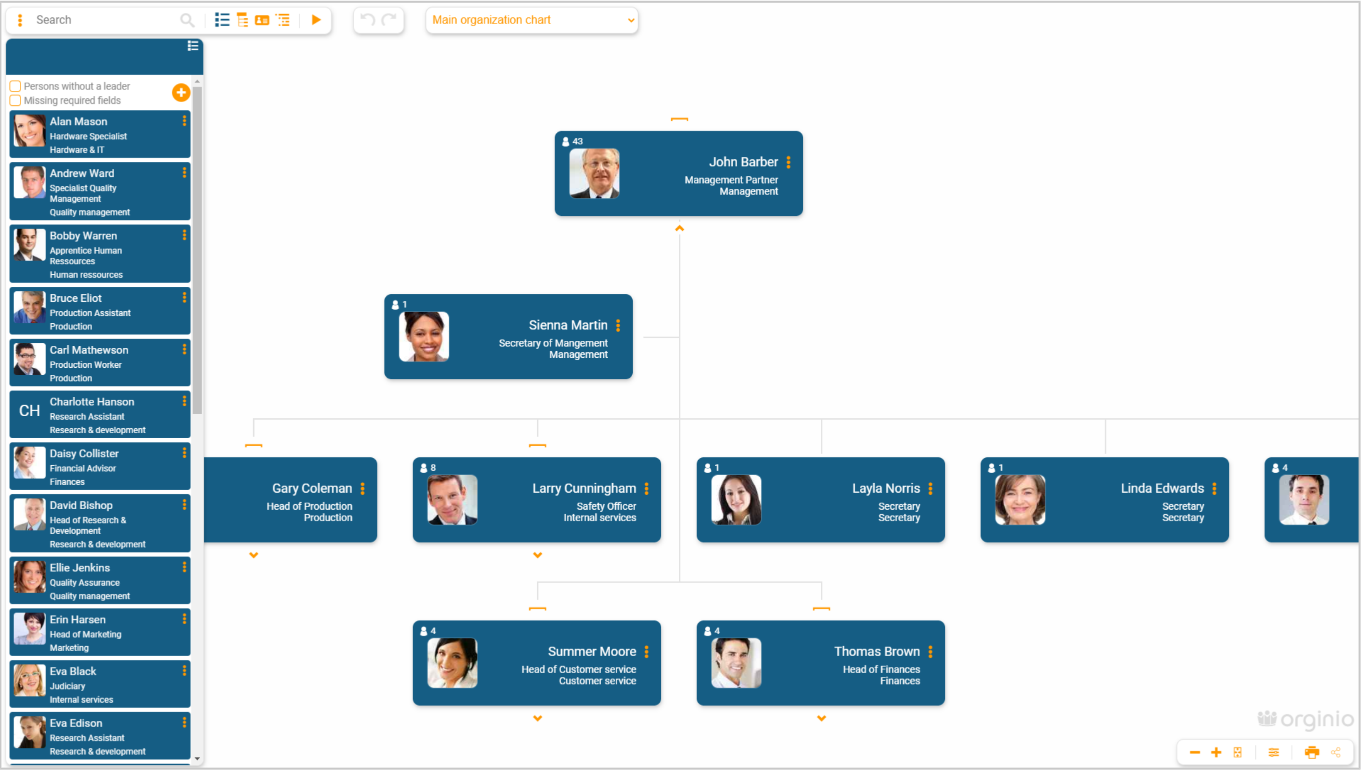


Fig. 55: Edit Mode - Interface

If modeling charts have been created in addition to the organization chart, you can select which of them will be displayed.

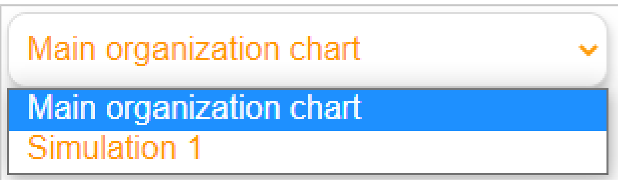


Fig. 56: View Mode - Organization chart select

Level navigation

A parenthesis symbol is displayed via each box if subordinate boxes are available.

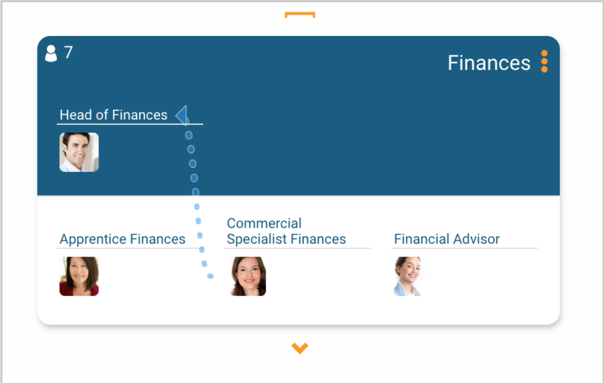


Fig. 57: Level navigation - Parenthesis symbol

The object at the highest level is displayed by clicking on the parenthesis symbol. The structure above it is replaced by a small hierarchy box. This new feature enables the printing of selected areas. You can hide the minimized hierarchy box using the **display options** of the **settings bar** (see Settings Bar [▶ 71]).

2. Box

Depending on the selected data structure (see Data [84]), boxes of the hierarchically highest data type are created automatically. If, for example, you have imported data containing the departments, positions and persons, the boxes for the departments are created. If, however, you have read in data containing positions and persons, the boxes for the positions are created. In the case of data merely containing persons, a box is created for each person.

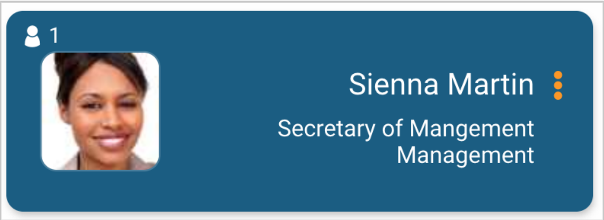


Fig. 58: Edit Mode - Organization Chart Box

The boxes contain information relating to the name of the hierarchy object and the objects assigned to it. In position and department hierarchies the box is divided into two areas. In the upper area are managerial objects and in the lower area are the normally assigned objects. This is not the case with person structures because a separate box is created for each person. You can still display analytical values at the top left in the box. This is first included from the Feature Set proceed PERFECT or higher (see Feature-Sets [164]). The analytical value **Headcount** is selected here by default. By clicking on the analytical value a selection list appears with different KPIs. If you have selected another analytical value, this appears in the box.

The **...** button takes you directly to the detail view of the corresponding object.

3. Multifunctional Bar

By clicking on the icons in the multifunctional bar the **menu**, **object lists**, **hierarchy tree** (from Feature Set proceed PERFECT and higher (see Feature-Sets [▶ 164])) and **detail view** can be displayed.

The areas are arranged below the multifunctional bar. Firstly, they can be deactivated again by clicking on the corresponding symbol in the multifunctional bar. Secondly, they can be also be hidden using an x symbol, which appears when moving the mouse over the icon at the top right in the respective area.

Beside the icons for the information areas is the triangle icon that can be used to change directly in the view mode.

Fig. 59: Edit Mode - Multifunctional List

3.1 Menu

You can access the menu using the …button. From here you can go directly to the **Data import** (see Data Import [▸ 10]) or to the **Settings** mask (see Settings [▸ 82]). If you have any questions, you can retrieve further information via the **Help** . You can also change directly from the menu into the **view mode** (see View Mode [▸ 139]) and **Log out** logs out the user currently logged in.

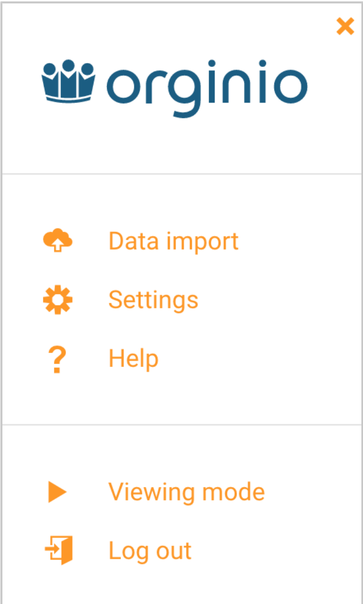


Fig. 60: Edit Mode - Menu

3.2 Object list

Object lists are generated for each data type after the data import. The objects are listed within the object list in alphabetical order.

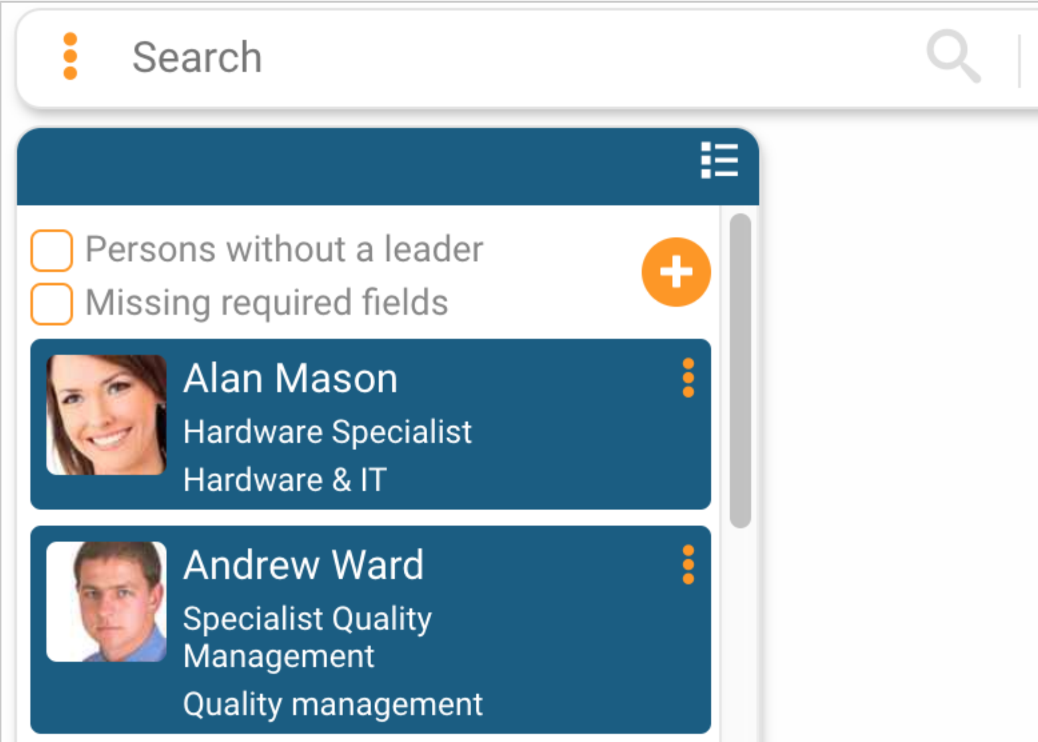


Fig. 61: Edit Mode - Object List (Example: Persons)

A new object can be created directly using the **+**-button in the object list. You can read how to create a new object in the chapter detail view (see Detail view [▸ 76]).

The following search filters are possible for the listed objects of the person data type:

- **Person without position:** Only persons currently not assigned to any position are displayed in the object list.
- **Missing required fields:** Only persons that have unfilled required fields are displayed in the object list. You can read how to mark data fields as required fields in the chapter Schema [▸ 87].

The following search filters are possible for the listed objects of the position data type:

- **Vacant positions:** Only positions that have currently not been assigned to any person are displayed in the object list
- **Positions without department:** Only positions currently not currently assigned to any department are displayed in the object list
- **Missing required fields:** Only positions that have unfilled required fields are displayed in the object list. You can read how to mark data fields as required fields in the chapter Schema [▸ 87].

The following search filters are possible for the listed objects of the department data type:

- **Missing required fields:** Only departments that have unfilled required fields are displayed in the object list. You can read how to mark data fields as required fields in the chapter Schema [▸ 87].

The structure of a box within the object list depends on the data type. On the left-hand side you can see an object icon, or in the case of a person, a profile picture. Next to it is the name of the object, and below it, if applicable, is the name of an object assigned to it. In addition, each box has the **...** button for accessing the detail view of the corresponding object.

Fig. 62: Edit Mode - Object List Box (Example: Persons)

The object list can be deactivated again by clicking on the corresponding symbol in the multifunctional bar. Secondly, it can be hidden using an x symbol, which appears when moving the mouse over the icon in the object list at the top right.

3.3 Hierarchy Tree

The hierarchy tree is available from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]). It reproduces the structure of the organization chart in hierarchical increments. Only objects of the hierarchically highest object type are displayed. If objects of this object type should have no hierarchical relation, these are displayed at the highest level. In addition, analytical values are displayed for each object depending on which kind of analytical value was selected. By default, this is the headcount from the department.

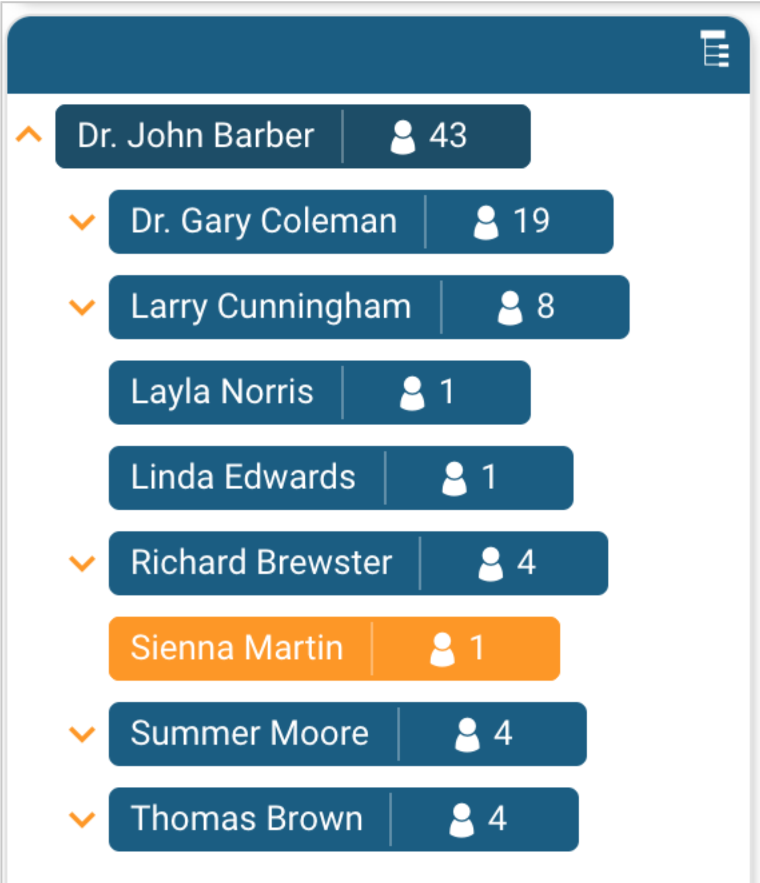


Fig. 63: Edit Mode - Hierarchy Tree

The **hierarchy tree** can be deactivated again by clicking on the corresponding symbol in the multifunctional bar. Secondly, it can be hidden using an x symbol, which appears when moving the mouse over the hierarchy tree.

3.4 Relations

All relation types that you have stored in the settings are displayed in the relations tab (see Relations [▶ 92]). Activate this relation type by clicking on the pen button.

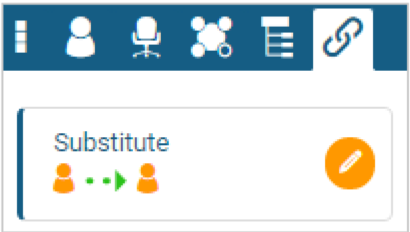


Fig. 64: Edit Mode - Relations

Afterwards, you can draw a **relation** from the source object to the target object in the organization chart. The start and end points of relations and the type of relation are also displayed in the details, depending on the configuration.

3.5 Object details

The object details are displayed for the object currently selected. All existing data fields of this object are listed.

Excluded from this are data fields that are not enabled for the current user via the access control (see Access Control [▸ 121]). Likewise, fields are not displayed here if in the schema (see Schema [▸ 87]) under **display in the detail view** the option **Only if information available** was selected and the corresponding field is empty, or **Always in view mode** was selected.

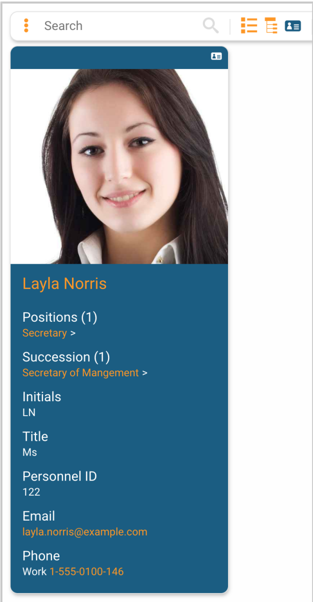


Fig. 65: Edit Mode - Object details

Linked objects and the individual object name are represented in the accent color (see Your own color scheme [▸ 112]). Clicking on these objects takes you directly to the detail view (see Detail view [▸ 155]).

The object details can be deactivated again by clicking on the corresponding symbol in the multifunctional bar. Secondly, it can be hidden using an x symbol, which appears when moving the mouse over the icon in the object list at the top right.

3.6 Legend

The legend of the display rules can be displayed here.

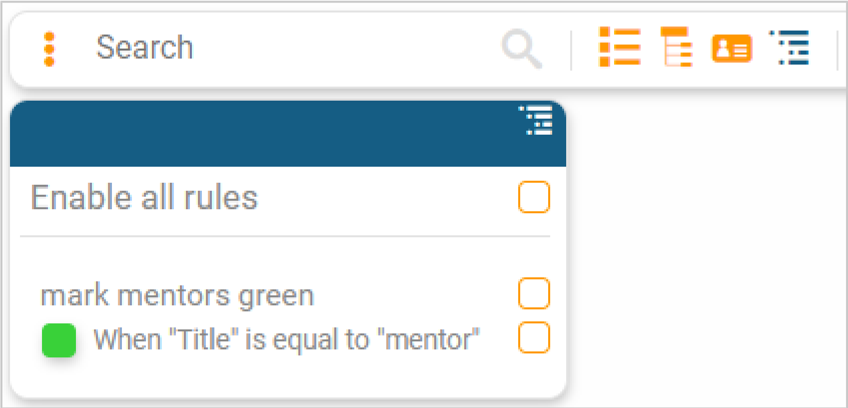


Fig. 66: Edit Mode - Legend

4. Search

By entering a search term in the search bar, all objects are searched for by data fields matching the searched free text. The hits are displayed as a selection list, grouped according to object types and sorted alphabetically.

When you click on the "Download search results" button, a ".xlsx" file is generated and downloaded, in which the search results are listed.

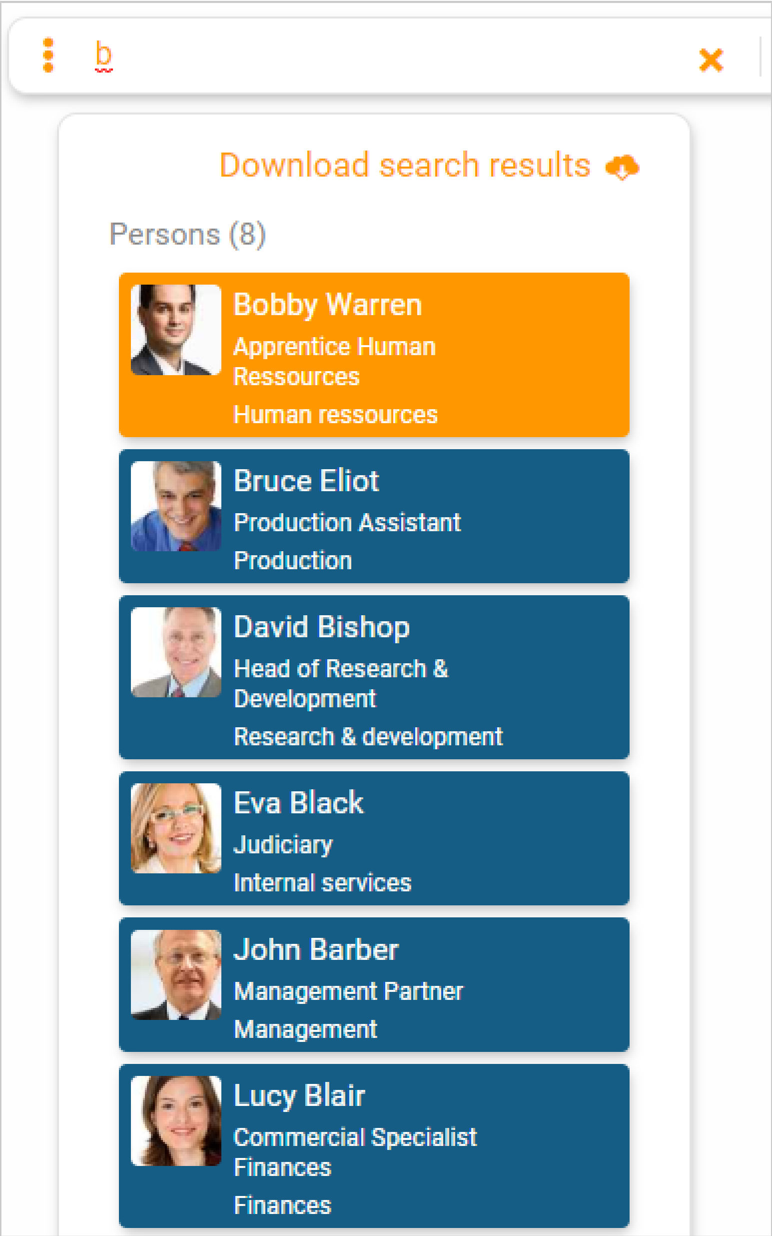


Fig. 67: View Mode - Search and Hit List

5. Position Display

The position display contains the entire path from the root of the organization chart up to the selected object. Hence, you can always see exactly where you are located in the structure.

Fig. 68: Organization Chart - Position Display

6. Settings Bar

The **settings bar** provides different functions for customizing the display. Furthermore, you can press this bar and share the current view with other users.

Fig. 69: Organization Chart - Settings Bar

	The **+** and **-** buttons zoom in or out of the organization chart.
	The **Reduce to page size** button selects the zoom factor and position of the organization chart so that it is fully visible.
	Using the **link icon** we define the conditions under which the link types (see Relations [▶ 92]) should be displayed and new links can be created. The dialog that opens for this will be described below.
	The **display options** button offers various options for regulating the range of displayed informa-tion in the boxes, and for activating and deactivating display rules. The dialog that opens for this will be described below.
	Using the **Output Current View** button you can print the organization chart with all currently dis-played boxes either as an image file or PDF file. Alternatively, it is possible to generate a batch print as a PDF file. The Feature Set proceed PER-FECT (or higher) is required for this
	Share current view generates a link that other orginio users can use to access the current specific view.

The **link icon** allows you to adapt the display options of the available links (see Relations [▶ 92]).

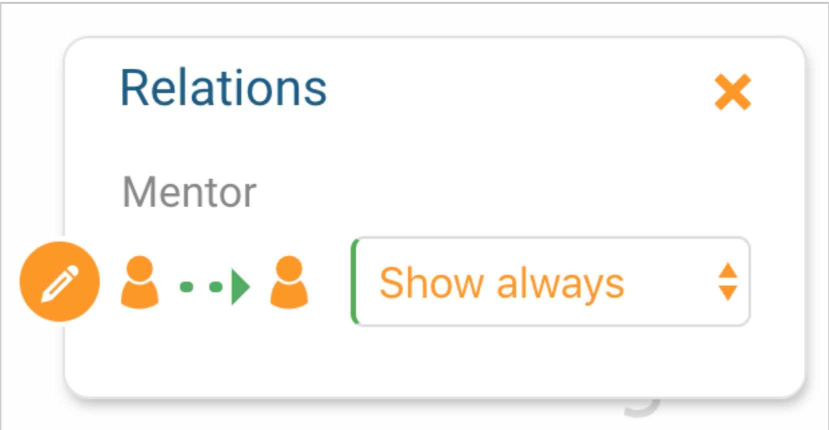


Fig. 70: Organization Chart - Settings Bar - Relations

In the dropdown menu, you can define the conditions under which the link is displayed. The following options can be selected:

- **Do not display**: The link is hidden.
- **For selected object**: The link is only visible if the object for which a relation was stored is selected.
- **Always display**: The link is always displayed.

By activating the **pen symbol** links can now be created in the organization chart via drag & drop.

The **display options** button offers various options for regulating the range of displayed information in the boxes, and for activating and deactivating display options.

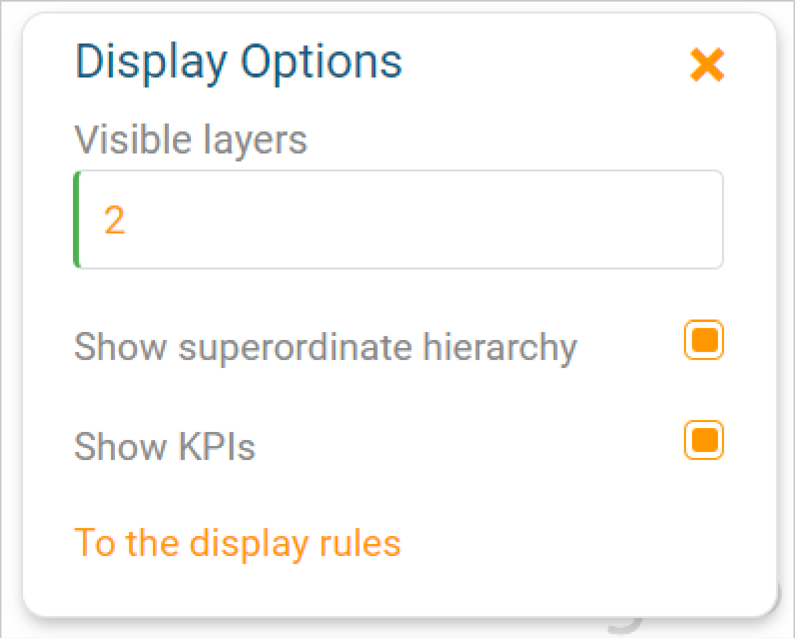


Fig. 71: Edit Mode - Settings Bar- Display Options

- **Visible layers:** Here you can set the number of visible layers.
- **Show superordinate hierarchy**: The small hierarchy box above the currently highest object box generated by the parenthesis symbol (see Organization chart [▶ 58]) is displayed or hidden. Thus, it does not appear on the printout of the current view either.
- **Show KPIs**: The KPIs are displayed or hidden. This is helpful for printing larger structures.
- **To the display rules:** The existing display rules can be activated or deactivated individually. It is also possible to deactivate display rules for an entire object type. Users with the **Edit data** permission (see Users [▶ 116]), can create new display rules (see Display rules [▶ 109]).

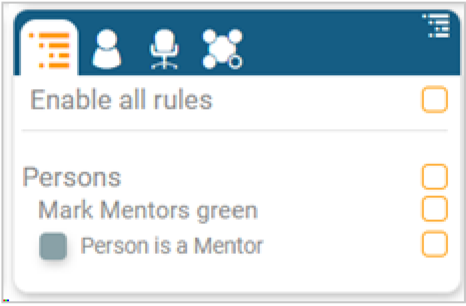


Fig. 72: Organigramm - display rules

Fig. 73: Settings Bar - Output Current View

The **Export Current View as PDF** button offers severals options:

- **PDF**: Creates a PDF file of the current view
- **Image**: Creates a image file of the current view
- **Batch Print**: Creates a PDF file of the organization chart. Several options are available. This button is only visible with Feature Set proceed PERFECT (and higher).

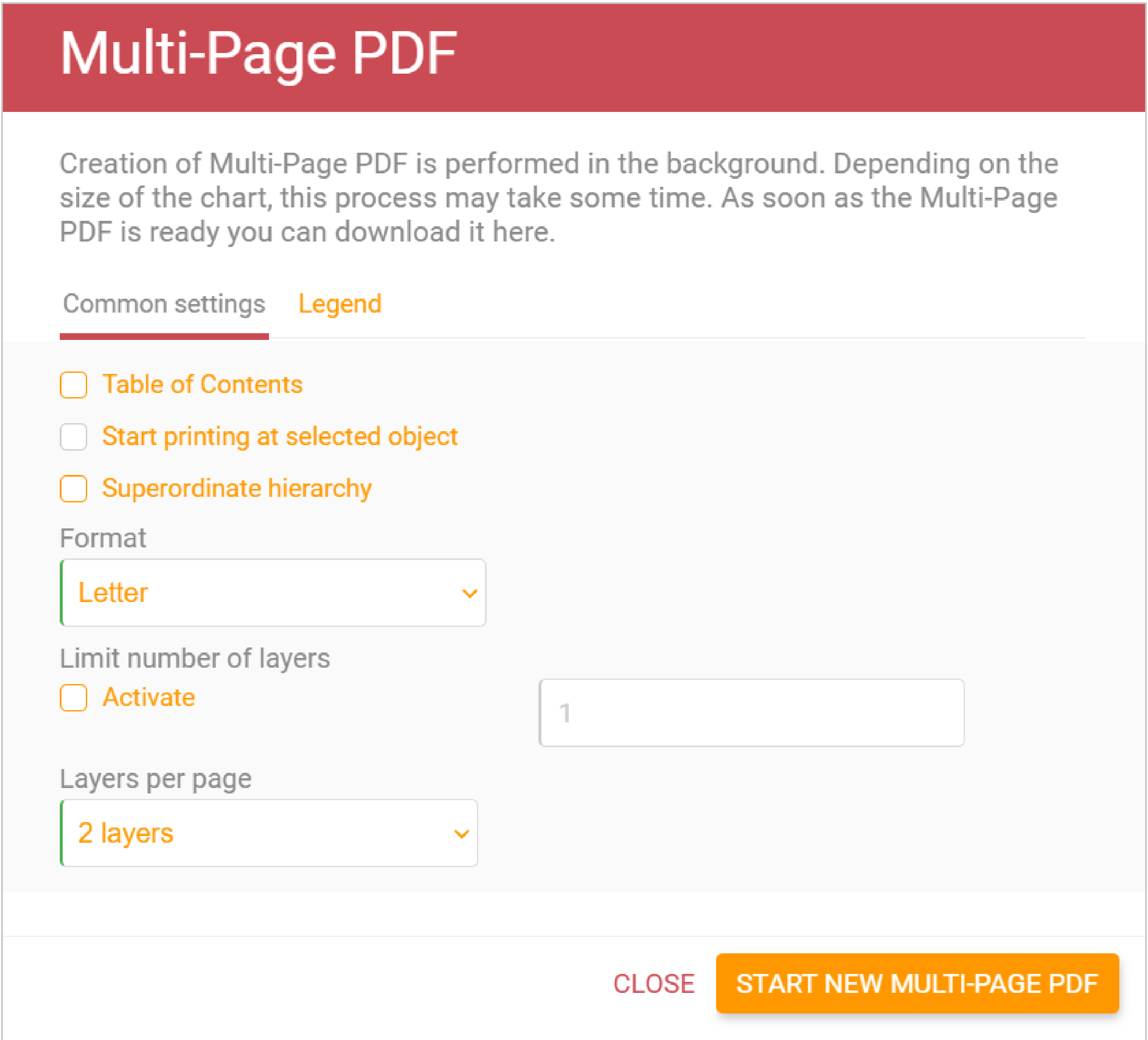


Fig. 74: Batch Print - settings

- **Index**: The index can be selected for the batch print
- **Root object**: It is possible to set the starting point as the root object or at selected object.
- **Limit number of layers:** Number of layers can be limited.
- **Layers per Page:** Here the number of layers per page can be set.

In the tab **Legend** you can set how the legend is displayed in the batch print.

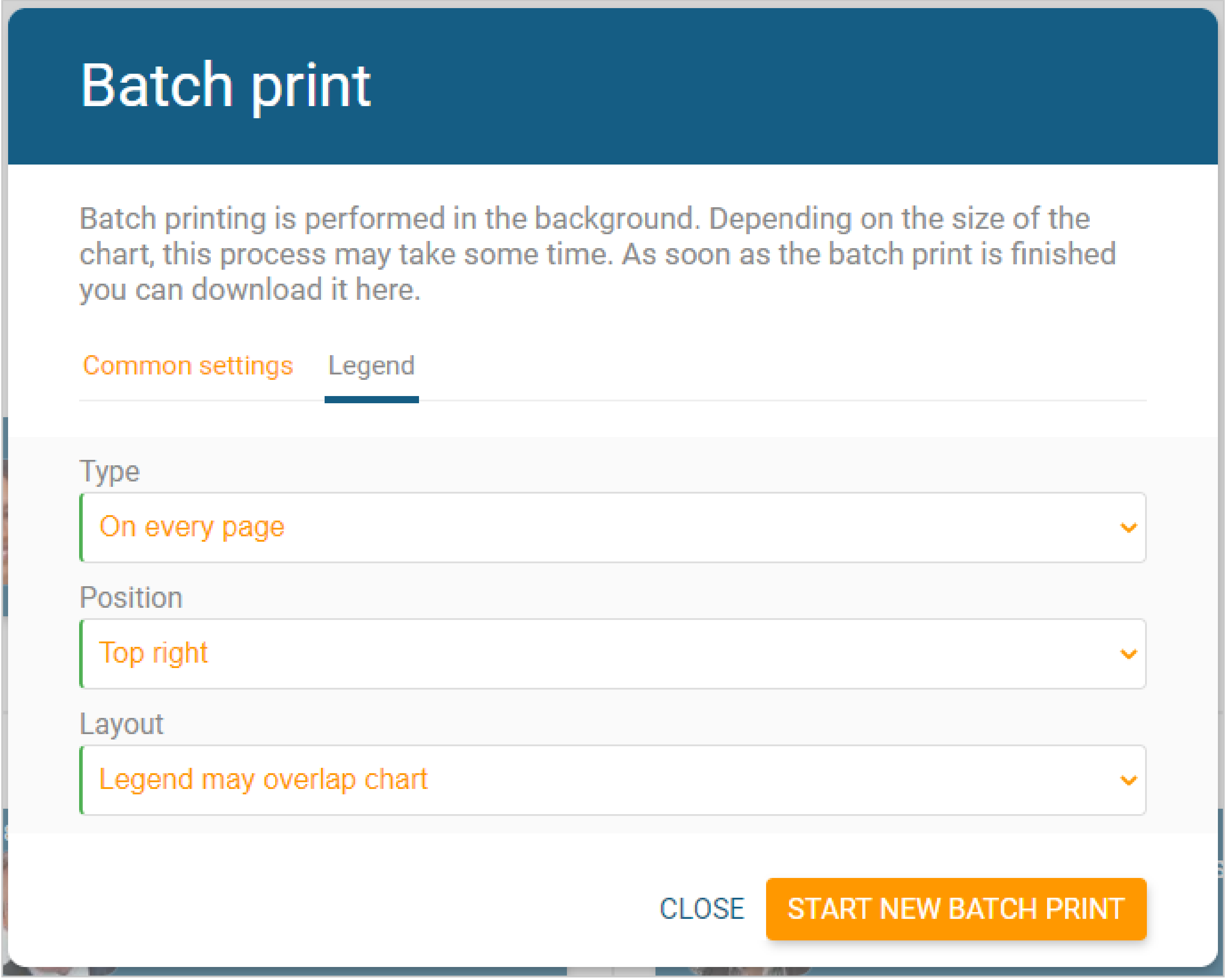


Fig. 75: Batch print - Legend

- **Type:** Sets how often the legend will be displayed.
- **Position:** Sets where the legend will be displayed.
- **Layout:** Sets if the legend overlaps the chart or if the organization chart will be displayed narrower.

As soon as the message **Batch print is available for download** is shown, the PDF file is available for download. You can open the dialogue by clicking on the message.

Fig. 76: Batch Print finished

7. Undo and Restore

These two buttons allow you to undo or restore performed actions. These buttons are only visible in the edit mode.

Fig. 77: Organization Chart - Undo and Redo

8. Detail view

You can open the detail view of an object by double clicking on the name of the corresponding object or by clicking on the ... button (next to the name). Subordinated/assigned objects and information on the object itself can be found in this mask.

> **!** The number of listed link types depends on the object type and the data structure selected (see Selection of the appropriate structure [▸ 8]).
>
> Under department archives, subdivisions, managerial positions, assigned positions and information about the department itself can be found. Under position archives, the directly subordinated positions, the position held by employees and information about the position are displayed. Under person archives, the directly subordinated positions and information about the person are displayed.

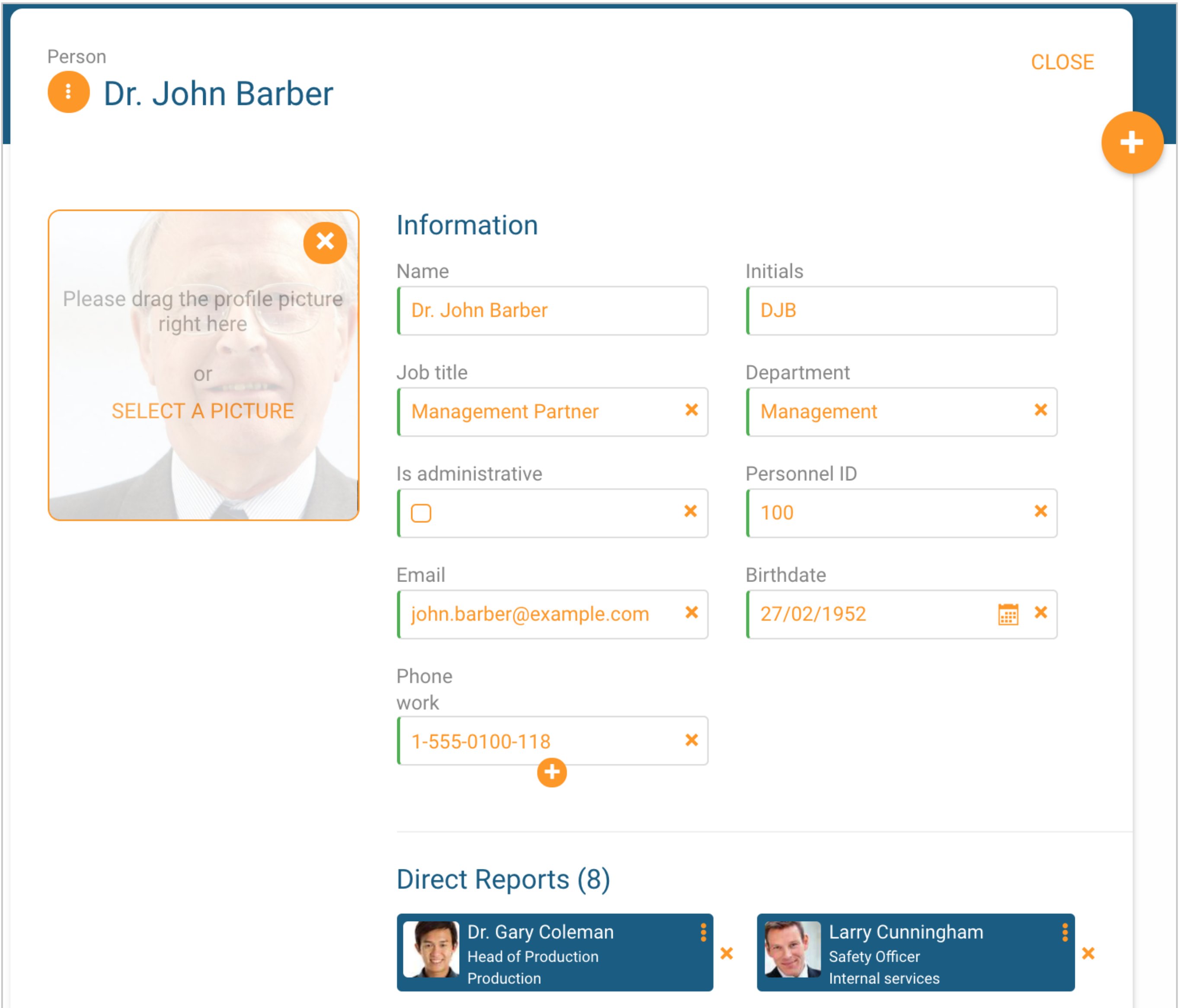


Fig. 78: Edit Mode - Detail View

...-button

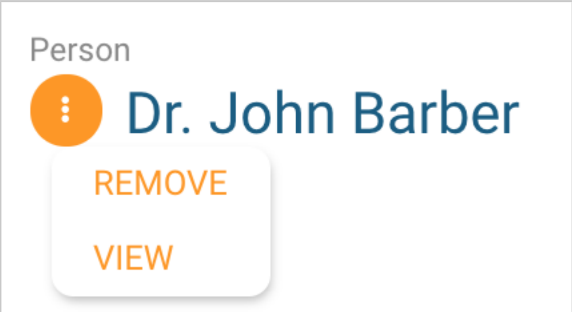


Fig. 79: Detail view - ... button

Using the ... button you can delete the object currently open in the detail view. This button also allows you to switch to the **view mode**. Next to this button is the name of the object and below it is the **position display**.

Information

All stored information for this object is listed in this area, unless it was locked in the access control settings (see Access Control [▶ 121]). You can remove information using the **x** button. Excluded from this is information about required fields, which cannot be removed but only edited.

Assigned and subordinate objects

In the lower area, hierarchically subordinate objects and assigned objects are listed. You can switch to the detail view of the selected object by clicking on the **...** button. The **x** button deletes the connection between the objects. The objects themselves are not deleted in the process. The contents of this area depend on the selected organization structure and selected data type (see Selection of the appropriate structure [▶ 8]).

Layout

Here you can determine the arrangement of the box, i.e. how the box is to be aligned with others. You can choose between symmetrical and asymmetrical trees and a feather arrangement.

+ button

Fig. 80: Detail view - Add Object or Information

New information on existing and new data fields can be added using the **+** button. Furthermore, you can create a connection to an existing or new object. Select the desired action by clicking on the corresponding field in the drop-down list.

Add information

In this dialog, new information on existing or new data fields of the current object are added.

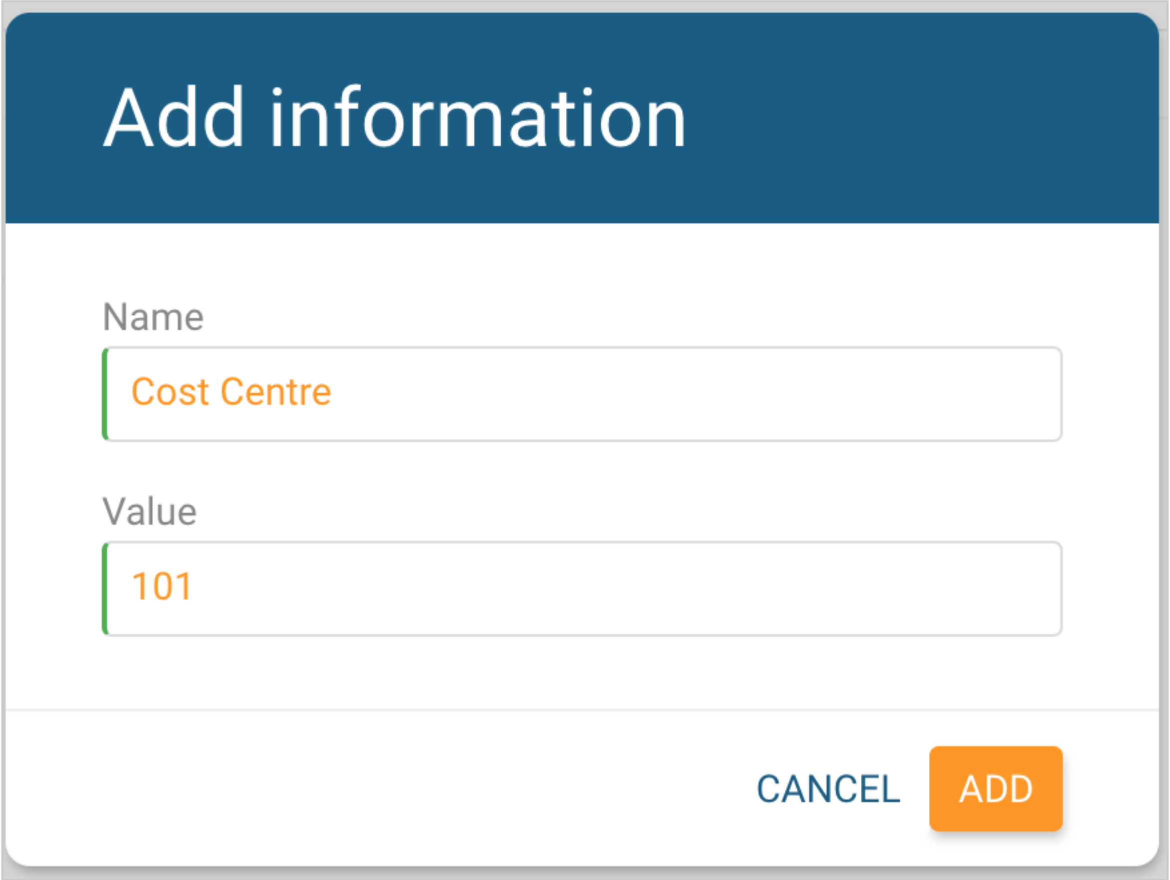


Fig. 81: Detail view - Add Information

To add new information, first store a **name**. All existing data fields (see Schema [▸ 87]) are listed in the drop-down menu. It is still possible to enter a free text.
Afterwards, enter the **value**(or information) of the data field.

The information is stored and added using the **Add** button.

Assign object

In this dialog, a connection to an existing or new object can be added

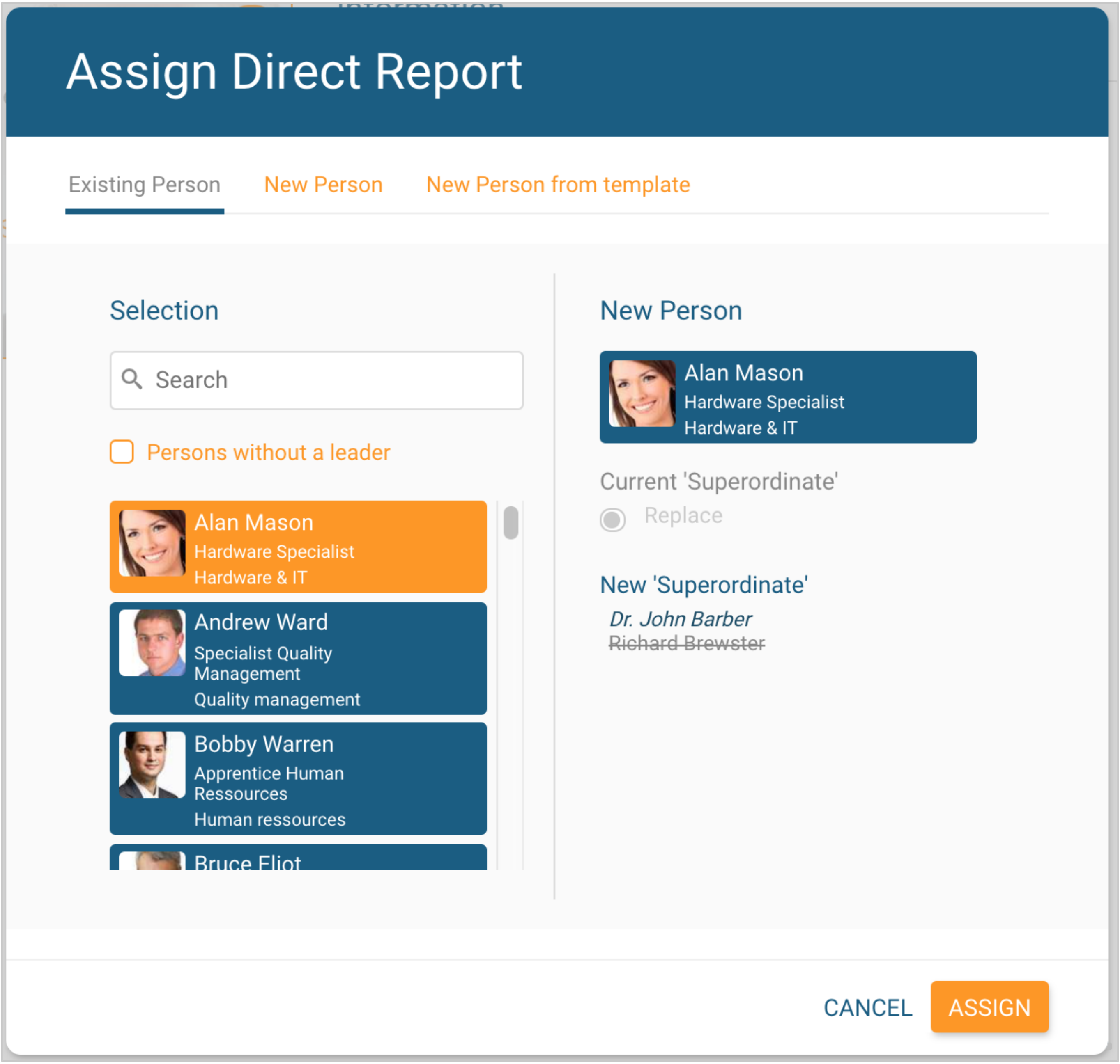


Fig. 82: Detail view - add existing object (different object type; here position to org unit)

In the **existing object** tab, all objects contained in the data of the corresponding object type are listed.
In the **Search in the left-hand area** you can enter the name of the object as free text. The first suitable entry is selected automatically here. The hit list can be filtered according to object type using the checkboxes below the search.
In the right-hand area the object currently selected is displayed and the **Assign** button adds the selected object.

! In the **Assign employee** dialog, (employees are assigned to a position) the **Replace** and **Retain** options are available for selection for the assignment. **Replace** cancels the connection of the person to their previous positions. If **Retain** is selected, the person continues to remain at their old positions.

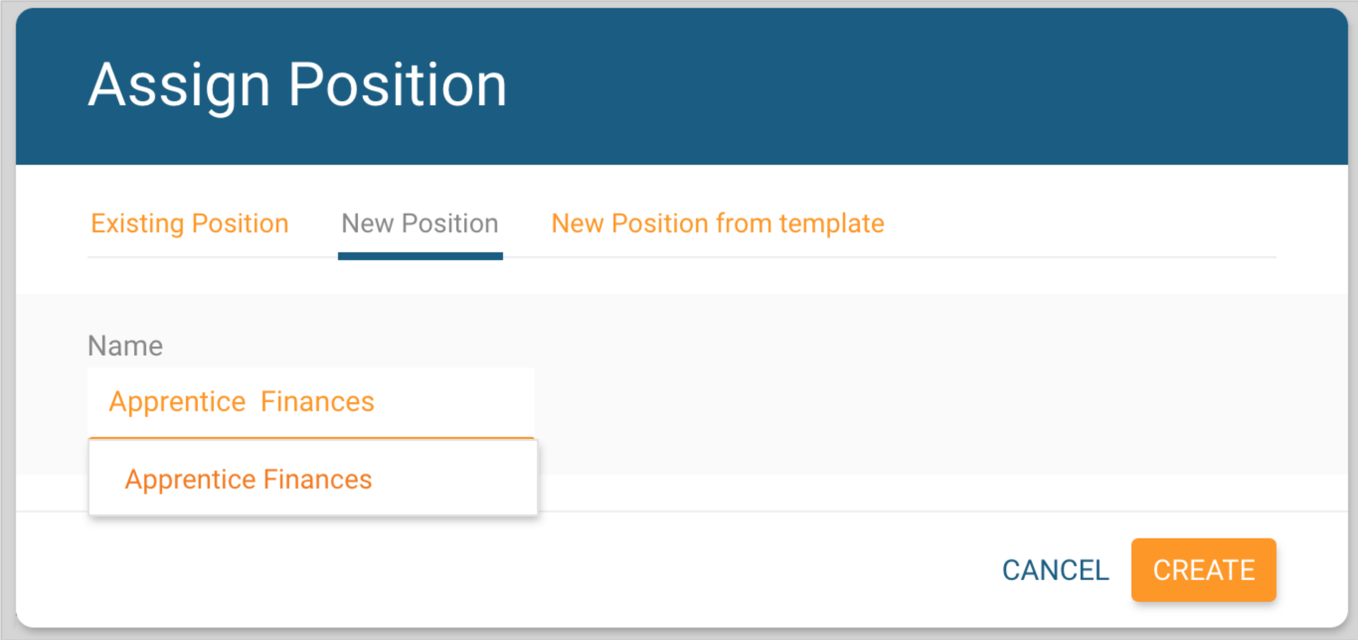


Fig. 83: Detail view - add new object (different object type; here position to org unit)

In the **New object** tab, a new object is created. First you have to enter a **Name** for this object. The names of the existing objects appear as suggestions. By clicking on one of the suggestions it is added to the **Name** field. It is still possible to enter free text. The name as well as all required fields of the object type (see Schema [▸ 87]) are listed as data fields to be filled. The **Create** button creates the new object and adds it.

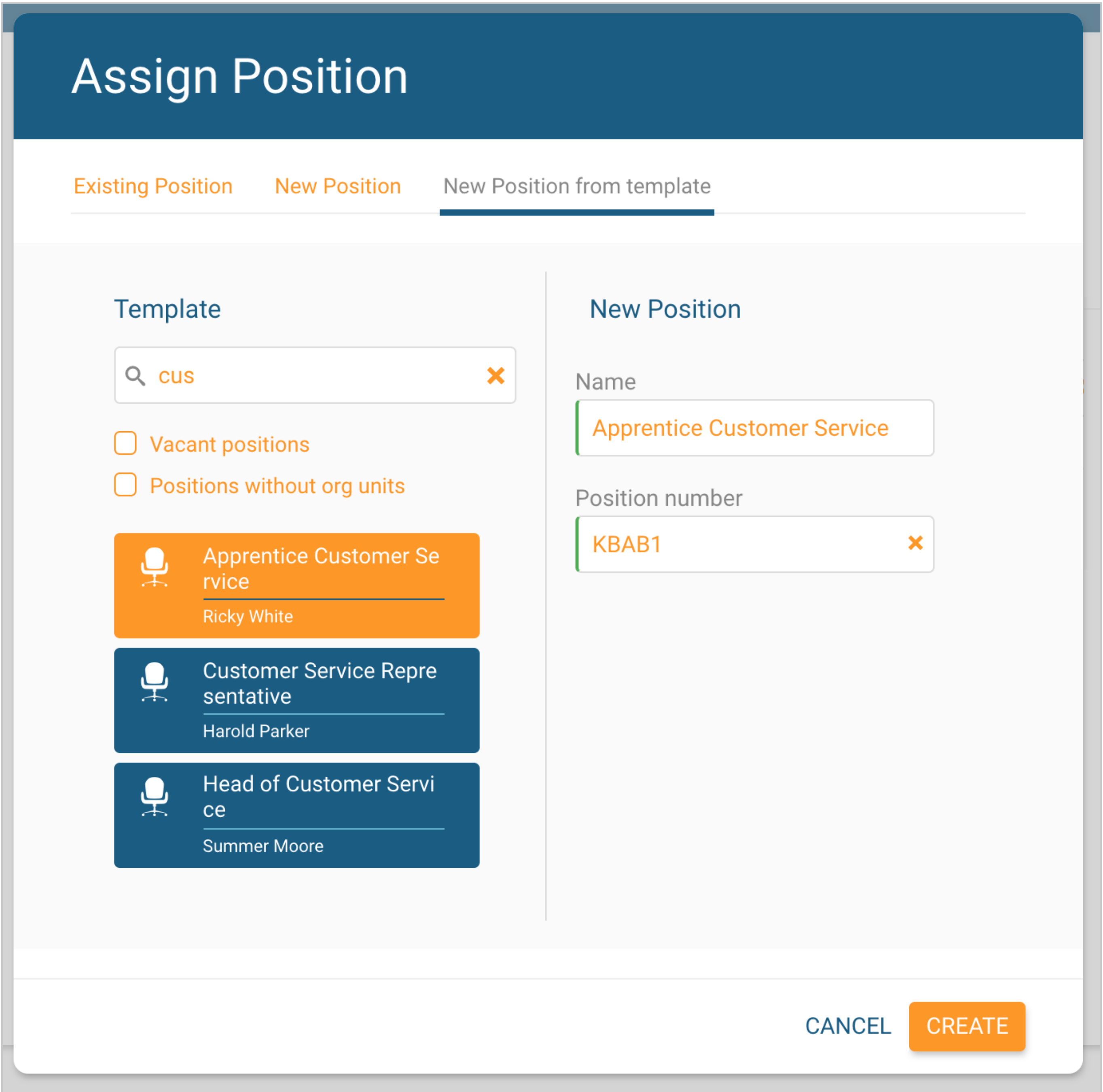


Fig. 84: Detail view - add new object from template (different object type; here position to department)

In the **new object from template** tab it is possible to create a new object based on an existing object.
In the Search in the left-hand area you can enter the name of the object as free text. The first suitable entry is selected automatically here.
In the right-hand area, all data fields of the new object are displayed. The data fields on the right-hand side are displayed pre-filled and can be customized before creating the object.
The **Create** button creates the new object and adds it.

III Settings

1. Basic settings

In the basic settings, you make settings that affect your own **Profile**. Here, you can change your specified **Email**, the **Password** as well as the **Display language**.

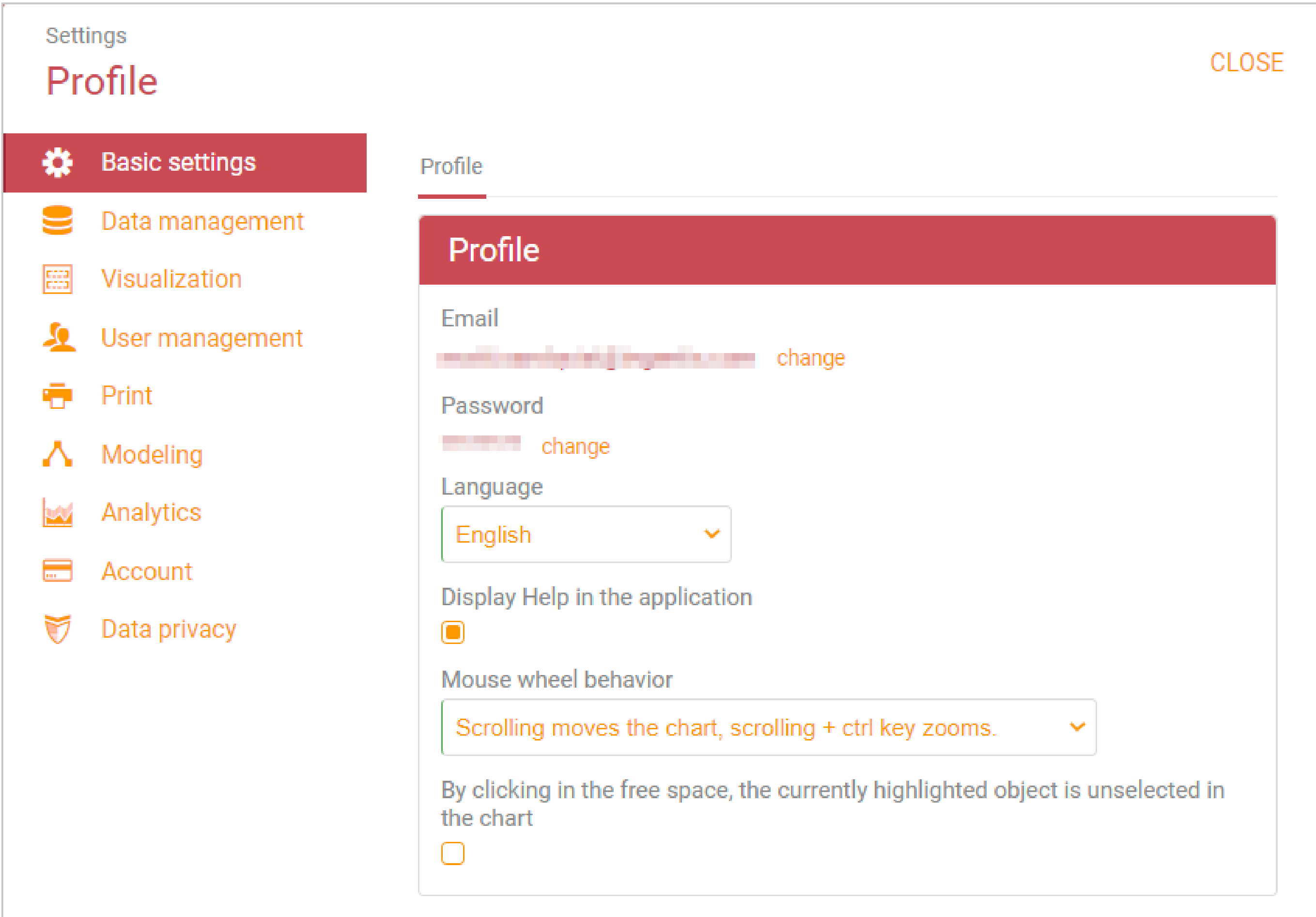


Fig. 85: Settings - Profile

If the option **Display Help in the application** is set, then green question marks will be displayed on many occasions. By clicking on it, helpful information is shown.

Fig. 86: question mark

In addition, the **mouse wheel behaviour** can be set here and also whether **clicking in the free space deselects the currently selected object**.

In the change **email address** dialog you have to enter your new email address twice to prevent any errors. In addition, the password is required as confirmation

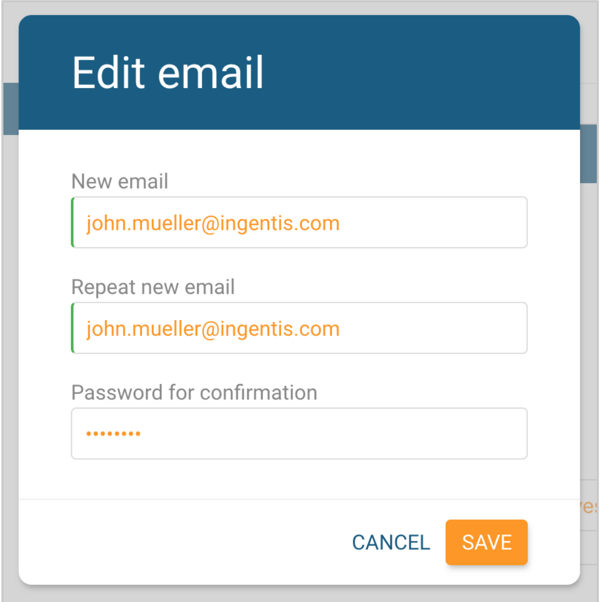


Fig. 87: Settings - Change email address

In the change **password** dialog you have to enter your new password twice to prevent any errors. In addition, the old password is required as confirmation.

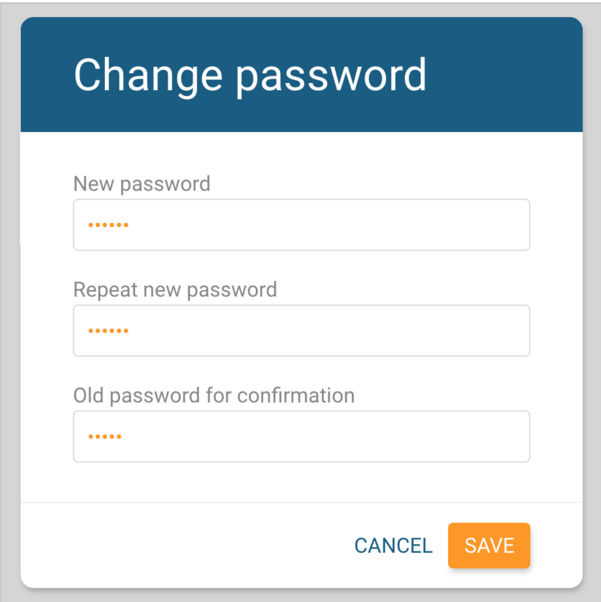


Fig. 88: Settings - Change password

The orginio software is available in German and English . Select the desired **language** in the drop-down menu.

Under **mouse wheel behavior** you can select whether scrolling the mouse wheel on the organization chart surface should result in zooming or downward and upward movements. By pressing the CTRL button simultaneously and scrolling, the other corresponding behavior is executed.

2. Data management

In the data management you can make settings that affect the data itself.

2.1 Data

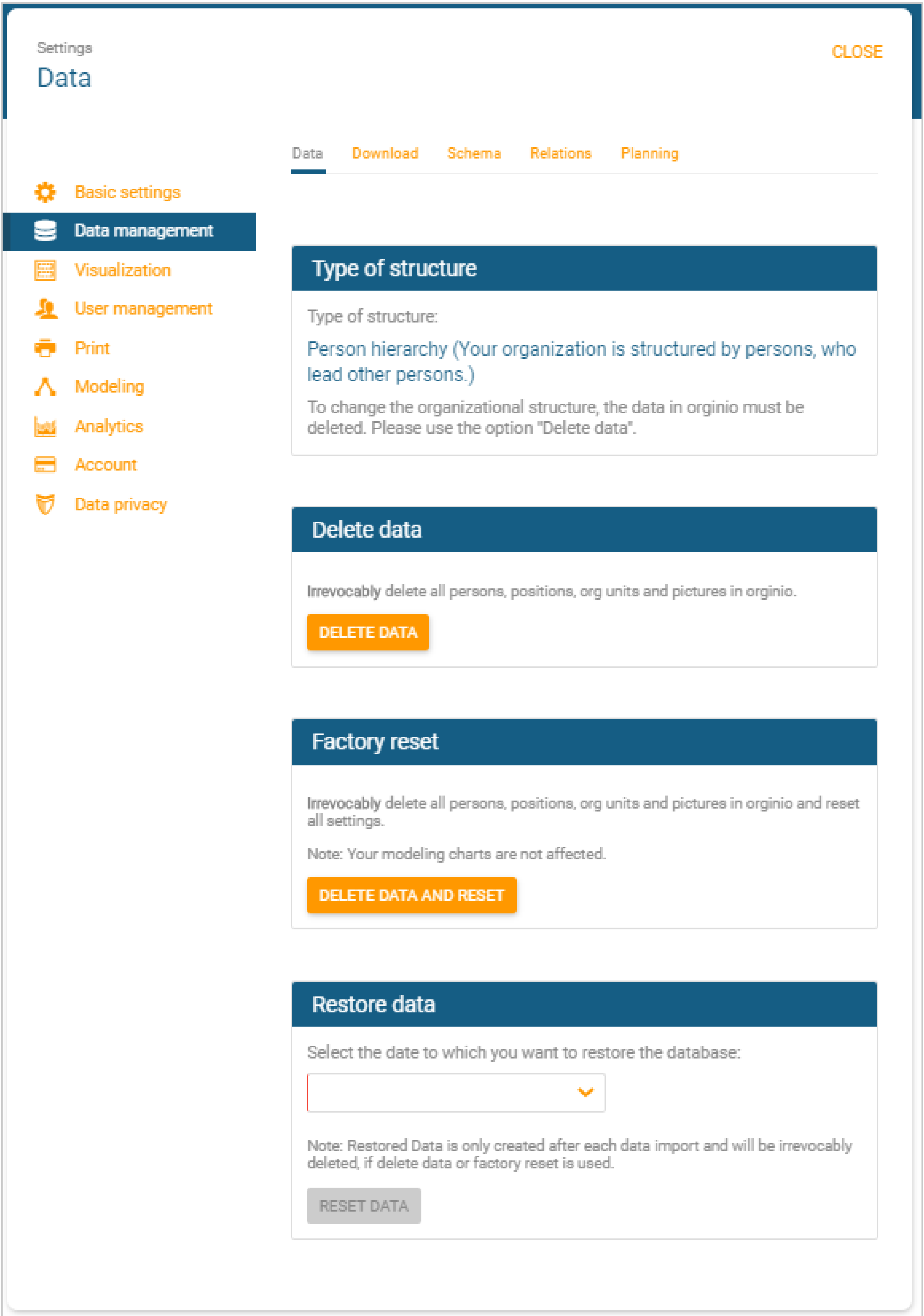


Fig. 89: Settings - Data

Type of structure specifies which structure was selected. This can only be changed by deleting the existing data and selecting a new structure type.

Delete data irrevocably deletes all objects, their relations with each other and pictures.

Delete data and reset resets orginio to the factory settings. As a result, all previous data are deleted and the settings are reset. Excluded from this are the settings of the user management (see User Management [▸ 116]) and the account (see Account [▸ 131]). This process can take several minutes.

Restore data resets data to a reset point. This is possible from the Feature Set complete COMFORT or higher (see Feature-Sets [▸ 164]). A reset point is created with the following actions:

- **Before importing data** (see Data Import [▸ 10])
- **Before reassigning a number range**
- **Before restoring to a reset point**

The determined reset points are made available by means of a selection list.

It should be noted that due to **Delete data** and **Delete data and reset** all reset points will also be deleted.

2.2 Download

You can download the current status of the data either in orginio format or as a CSV file. You can find out more about the individual formats by clicking on the question marks above the formats. The downloaded data can then be imported back into orginio.

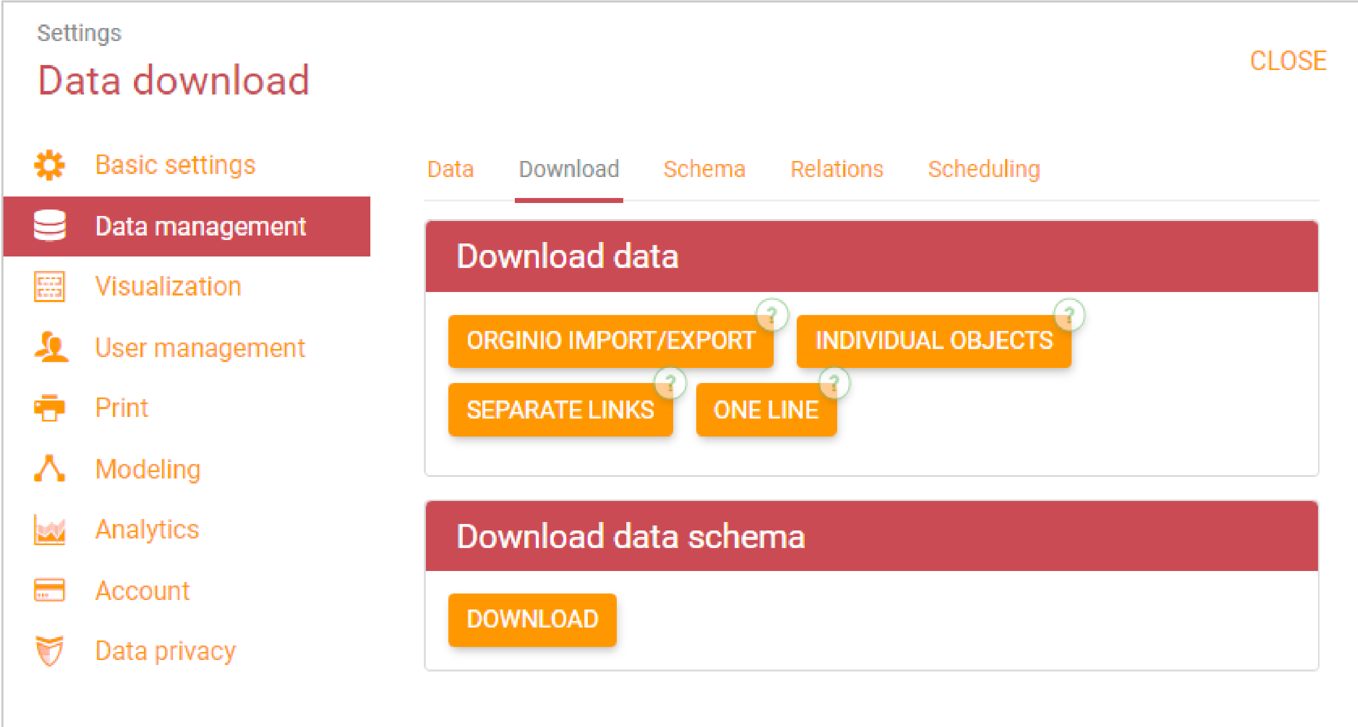


Fig. 90: Settings - Download

The CSV file created by **Download data** contains the entire data of the organization chart created in orginio. **Other formats** makes it possible to select the format of the CSV file.

The JSON file created by **Download data schema** contains all data field types (see Schema [▸ 87]). By importing a data schema (see Data Import [▸ 10]) all data field types can be transferred to another account. Thus, in the case of multiple subsidiaries each with their own orginio accounts, it is possible to create one initial schema or data set in an orginio account and to transfer this to all other accounts by export/import.

Example: Subsidiary 1 exports a data schema containing the data fields qualification, leadership competence, address and continent. Subsidiary 2 imports this data schema and therefore also has the data fields in its orginio account.

It should be noted that the data schema file contains the data field types but no data field contents. Existing data fields will not be overwritten during an import.

2.3 Schema

Under **Schema** from the Feature Set proceed PERFECT or higher (see Feature-Sets [▶ 164]) you can preconfigure data fields for the object types. Thus, it is possible, for example, to define individual data fields as **required fields** using this setting. In addition, you can make access control settings for data fields.

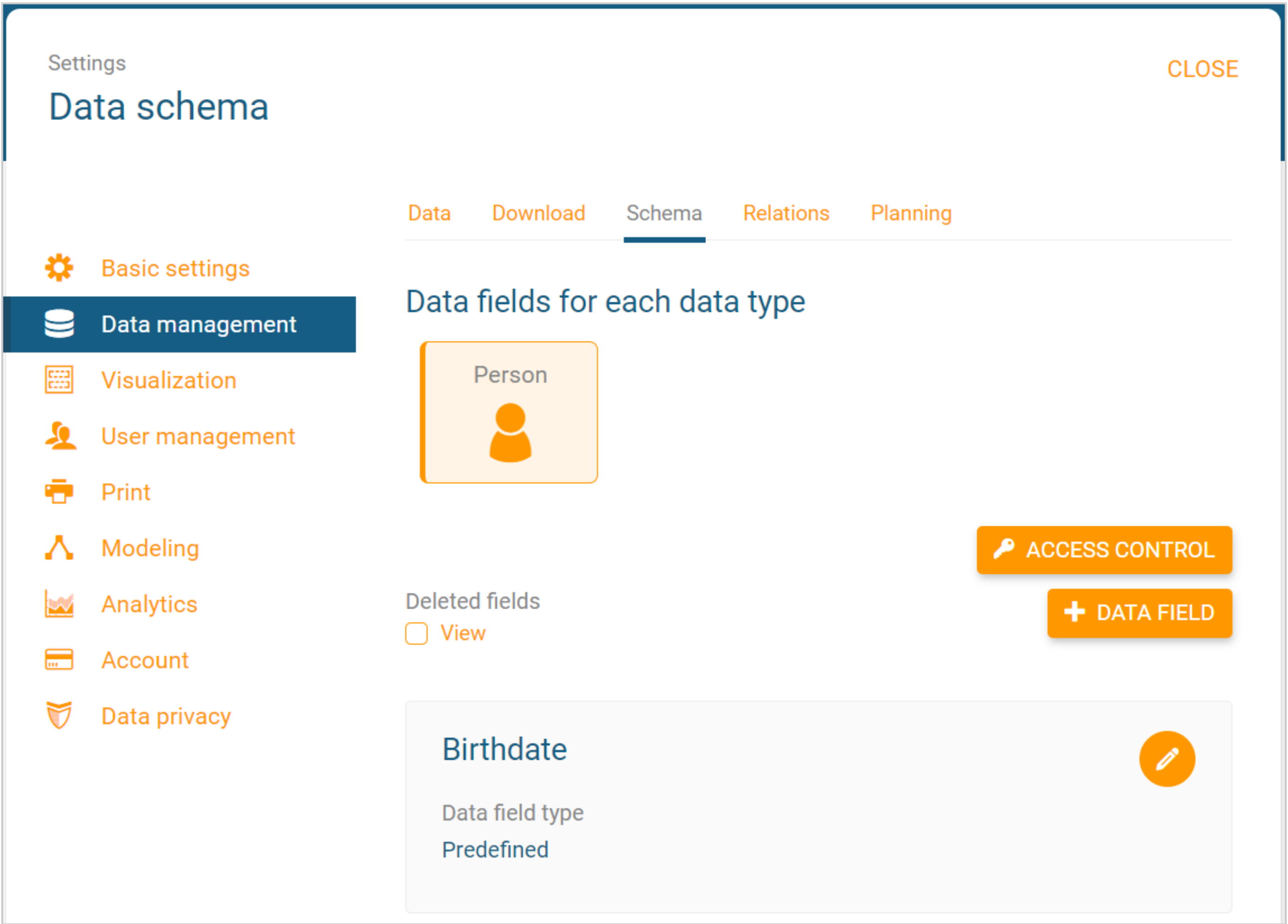


Fig. 91: Settings - Schema

- The deleted fields with a crossed out name are displayed by activating the **Display** checkbox in the **Deleted fields** area.
- With **Access Control** you can give basic permissions for any data type.

Changes to access protection only affect users after they have logged off and then logged on again!

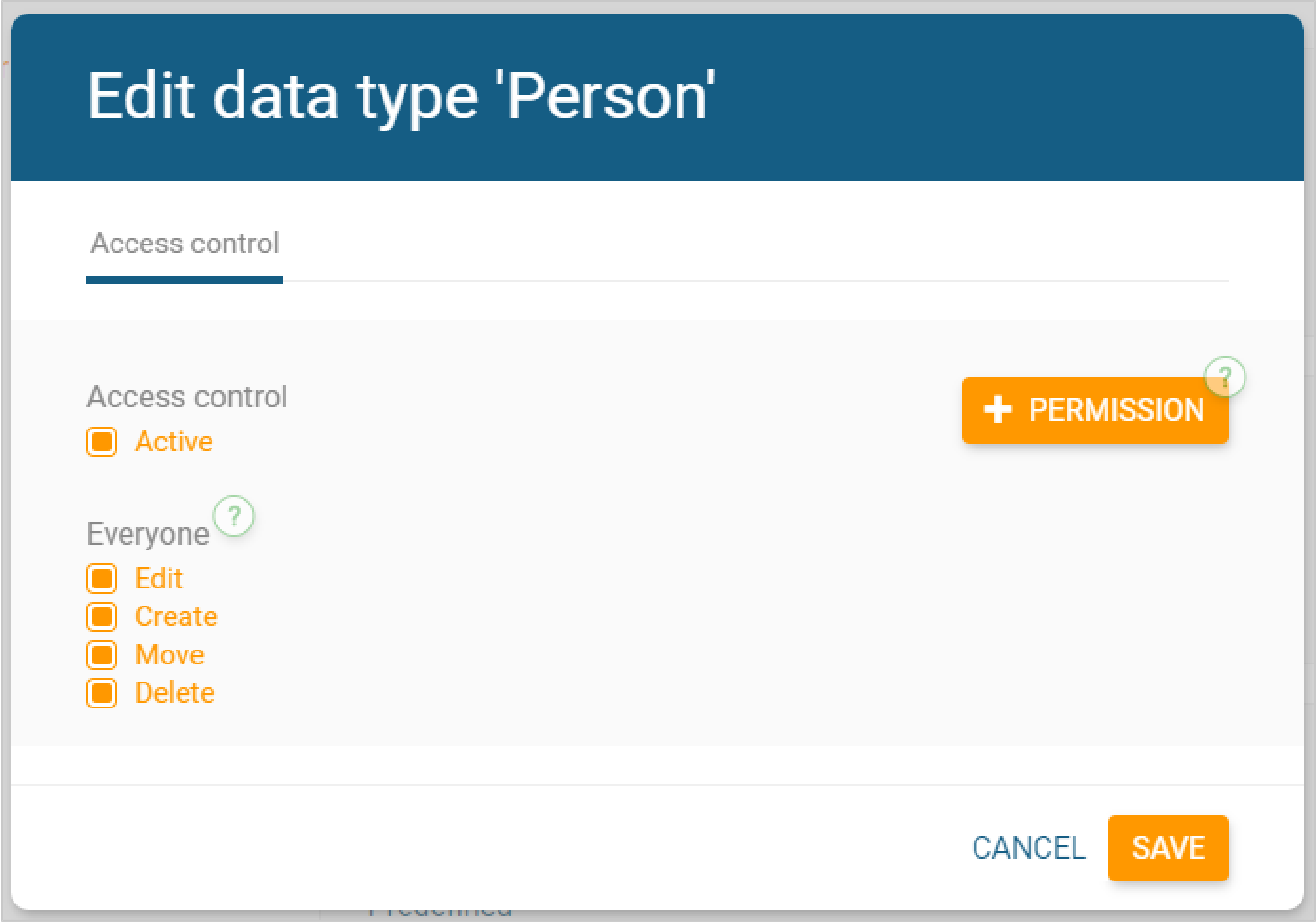


Fig. 92: Schema - Access Control

- Data fields for the data field currently selected are added via **+ data field** and the settings of this data field are initially made.
- The **pen** button opens the **edit field** dialog for the respective data field. Data fields are edited in the **edit field** dialog along the same lines as the following description of the **add field** dialog.

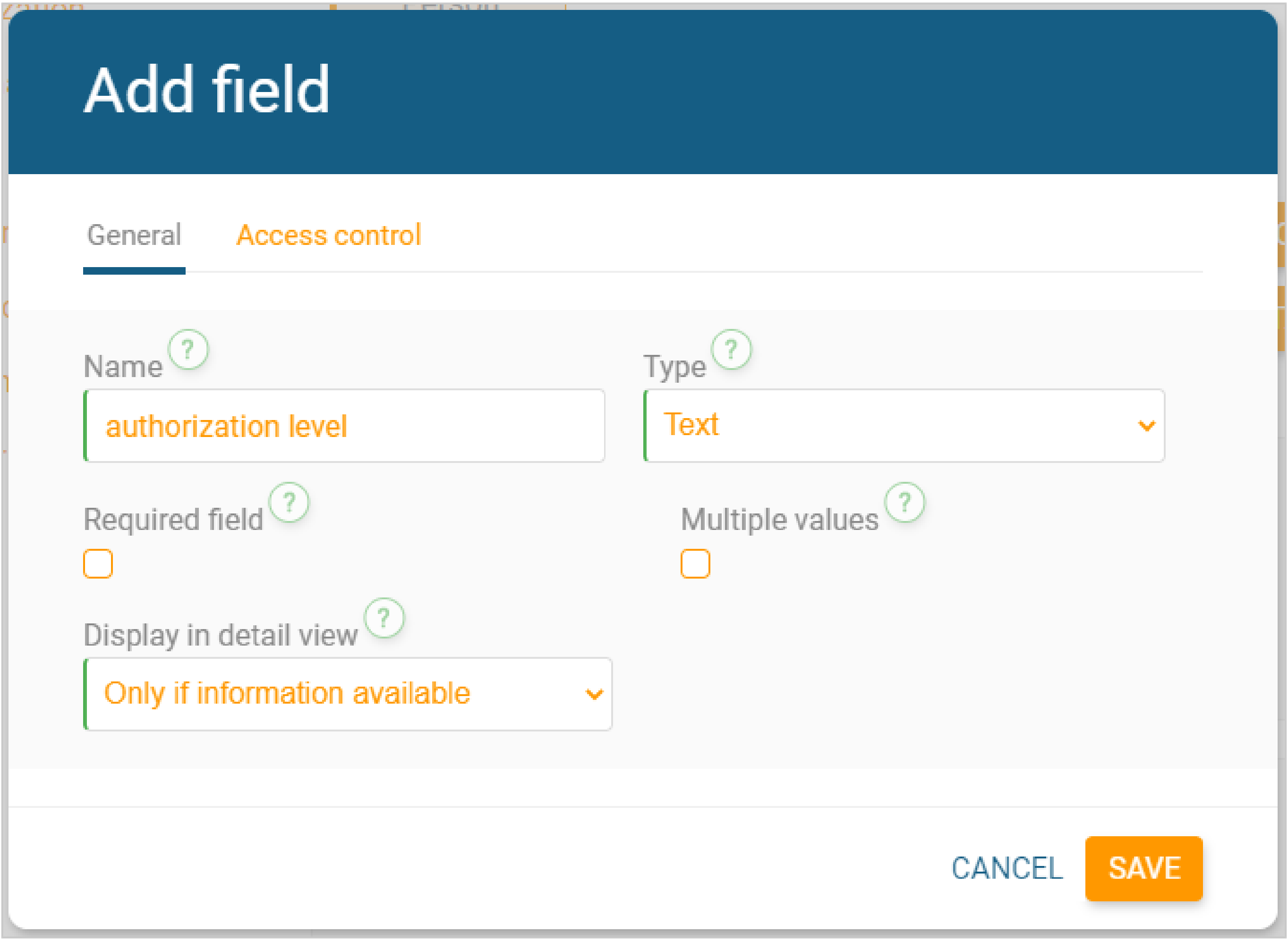


Fig. 93: Settings - Schema - General

Name displays the name of the data field. The name of the field can be changed.

Type indicates whether it is a predefined type. If it is not a predefined type, the field type can be specified here. The following data types are available in the selection list:

- **File**: A file can be saved for any field type. It is displayed in the detail view and can be opened or downloaded from there.
- **Date**: This is a field with a calendar data. The date format is adapted automatically to the language set in the browser.
- **Yes / No**: This is a Boolean field. It can contain the values Yes / No or 0 / 1.
- **Number range**: This is an alphanumeric field. Each newly created object is assigned a number from the defined number range automatically; the number increases incrementally by the value 1. This field type is particularly suitable if the orginio data should be imported into other languages later.
- **Text**: This is an alphanumeric field.
- **Value range**: This is an alphanumeric selection field. The available values can either be stored manually or imported.
- **Number**: This is a numeric field. Here you can also determine how many decimal places (1,2 or 3) the number should have.

Required field marks a data field as information of an object type that cannot be removed and must be filled with contents when creating a new object.

Multiple values marks a data field as a multiple value data field. This enables a variety of information of the same type to be maintained clearly. This is helpful, for example, when creating several telephone numbers of the same person.

In the **display in the detail view** dropdown menu, it is possible to determine under which conditions the field is displayed in the detail view. The following options can be selected:

- **Only if information available:** If no field content is available, the information is not displayed in the detail view.
- **Always visible in edit mode**: The field is always displayed in edit mode.
- **Always visible in display mode**: The field is always displayed in display mode.
- **Always visible**: The field is displayed both in edit and in display mode regardless of whether the field is filled or not.

! To delete data fields, select the **pen** symbol of the corresponding field and click on the **Delete** button.

You can edit settings relating to access via the **Access control** tab available from the Feature Set proceed PERFECT or higher (see Feature-Sets [▶ 164]).

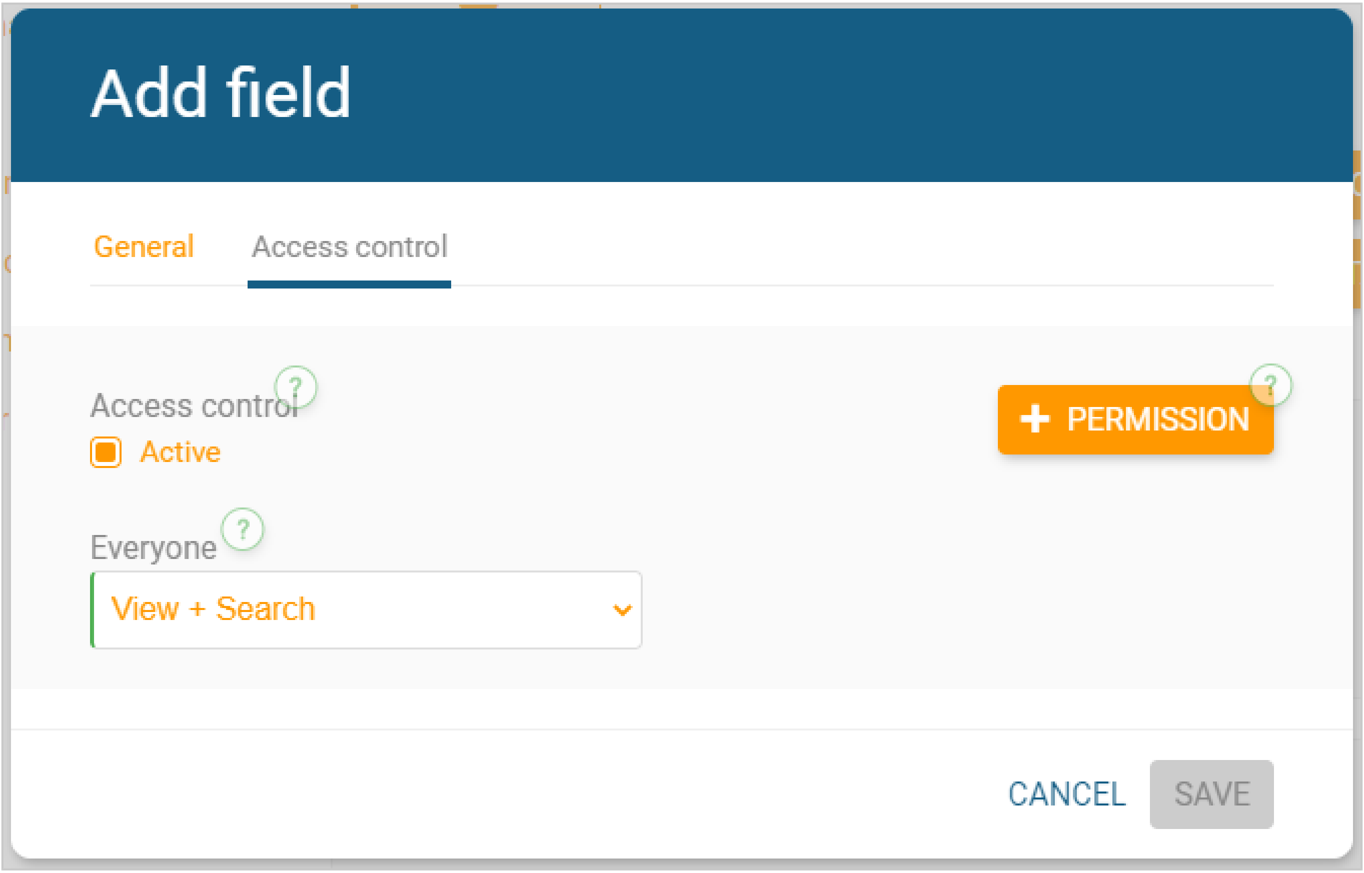


Fig. 94: Settings - Schema - Access Control

The **Active** option must be checkmarked in order to use access control. Afterwards, in the dropdown menu under **Everyone** you define what the basic setting is for all users. There are five types of permissions:

- **No access**: Prevents read and write access to a data field.
- **View**: The data field is displayed. It is not possible to change the content.
- **View + Search**: The data field is displayed and can also be used for the search.
- **View + Edit**: The data field is displayed and users with the **Edit data** permission can edit it.
- **View + Search + Edit**: The data field is displayed, can be used for the search, and users with the **Edit data** permission can edit it (see Users [▶ 116]).

The **+ permission** button enables users / user groups to define their own access permissions. This is also possible for users / user groups that access using an access key (see Applications [▸ 119]).

> **!** In the access protection, make sure that user groups, especially the group "Everyone", are assigned as few permissions as necessary. The reason for this lies in the fact that permissions assigned via groups cannot be reduced from other settings but can only be extended.
>
> Example: The group "Everyone" is assigned the permission **View + Search + Edit** and the user group "External" is assigned the permission **No access**. Since group rights are not reduced and the group "Everyone" applies to every user, the group "External" therefore also receives the permission **View + Search + Edit.**
> In this case, the correct allocation of the rights would be such that the group "Everyone" and group "External" would receive the permission **No access**, and all users / user groups that should have more permission would be specifically assigned this.

2.4 Relations

Relations make it possible to show connections between e.g positions and staff members in the organization chart who belong to different organizational units without changing the structure or hierarchy. For example, a dotted line can be used to show the successor to the position of Sales Manager France, who still works in the PR department in the USA, or the deputy for the position of Technical Editor, who does not work in documentation but in product management. Likewise, mentor links can be displayed to show connections between staff members outside the department.

Relations are available from the feature set complete COMFORT (see Feature-Sets [▶ 164]). They show additional links between objects that exist in your database and define, for example, successor, deputy or mentor links. The additional links are displayed in the form of dotted lines in your organisation chart. This does not change the hierarchy of the organigram. Furthermore, the links are displayed in text form in the information area.

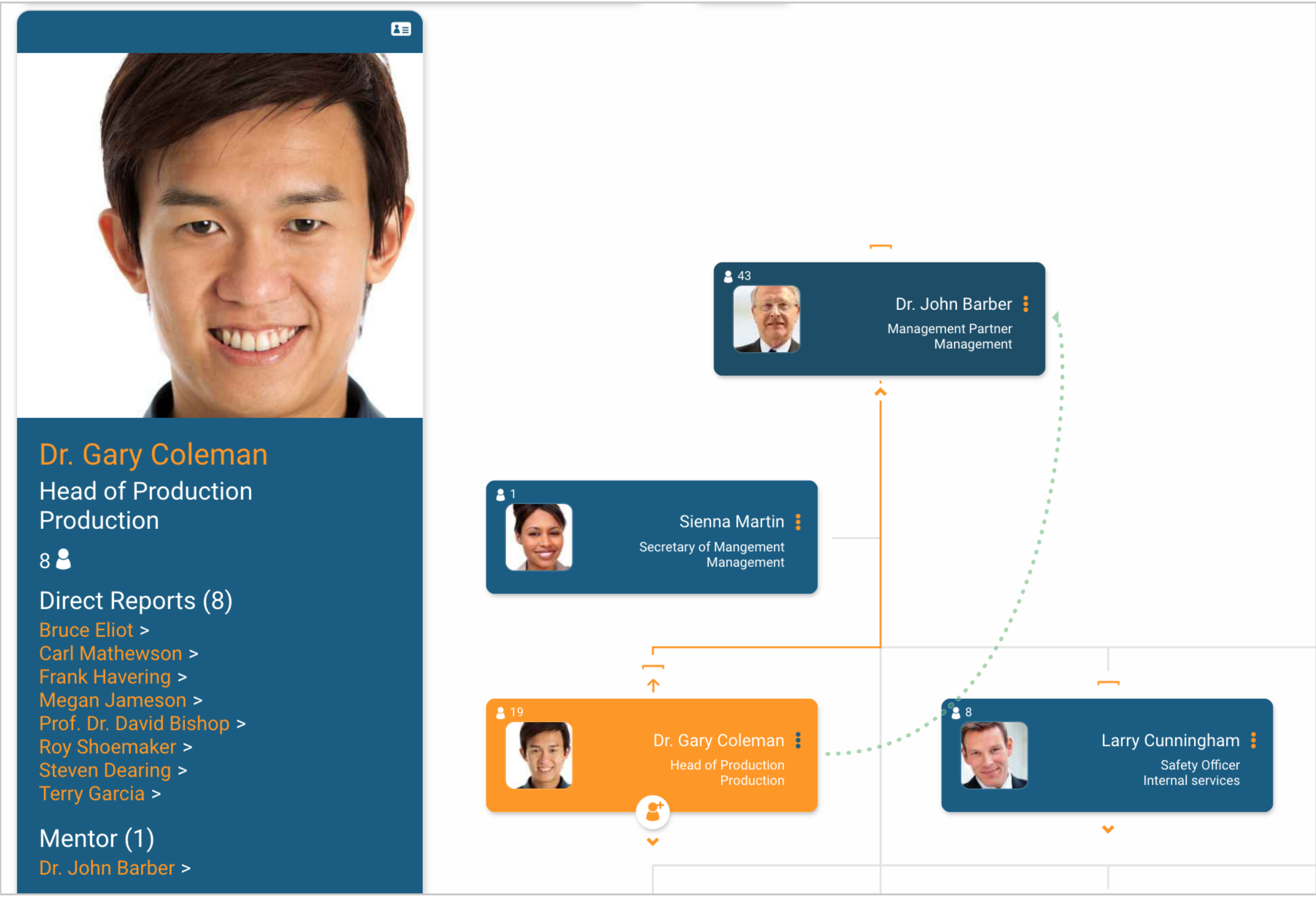


Fig. 95: Settings - Relation example

Create a relation by clicking on **+ Relation type**.

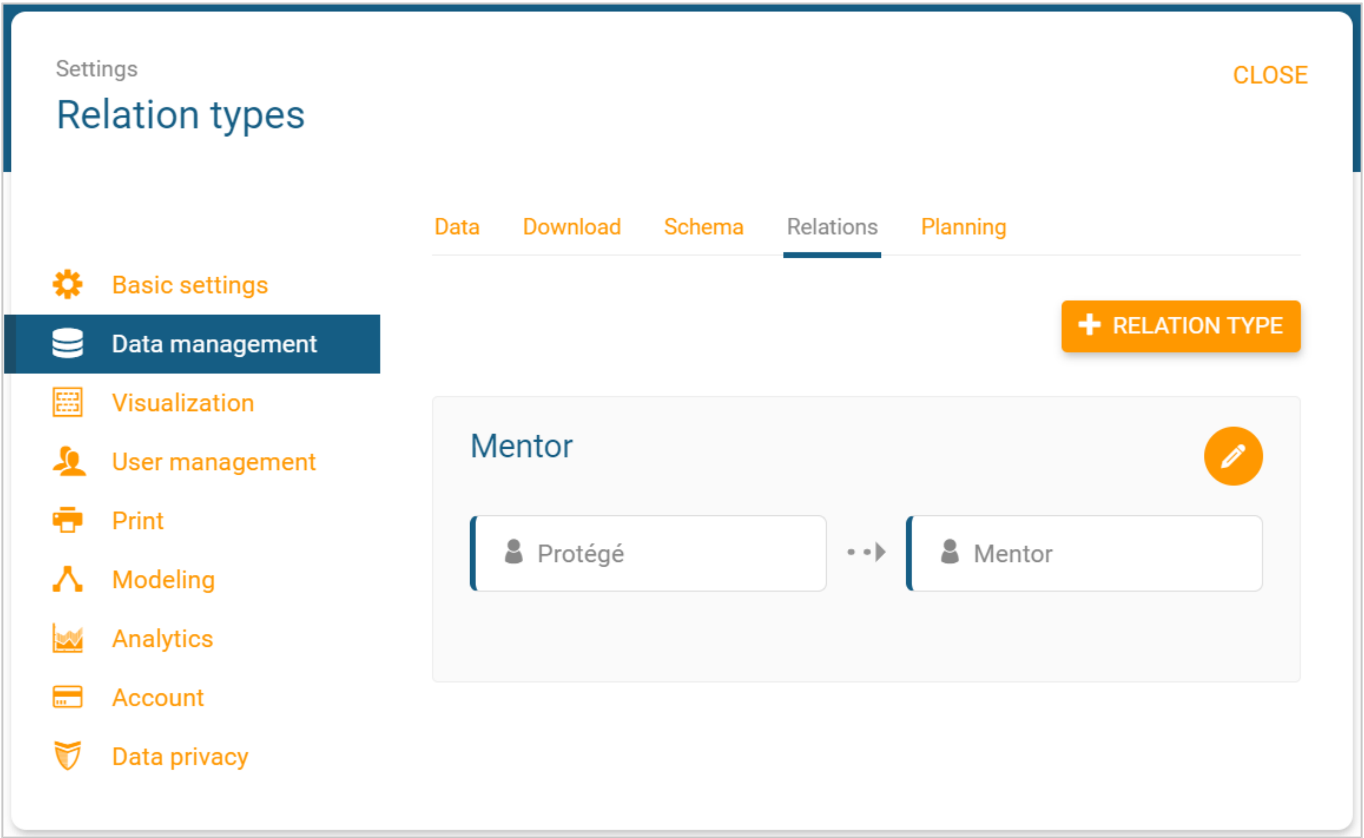


Fig. 96: Settings - Relations

In the **Add relation** dialog, you can select a relation type from the templates or create an additional relation.

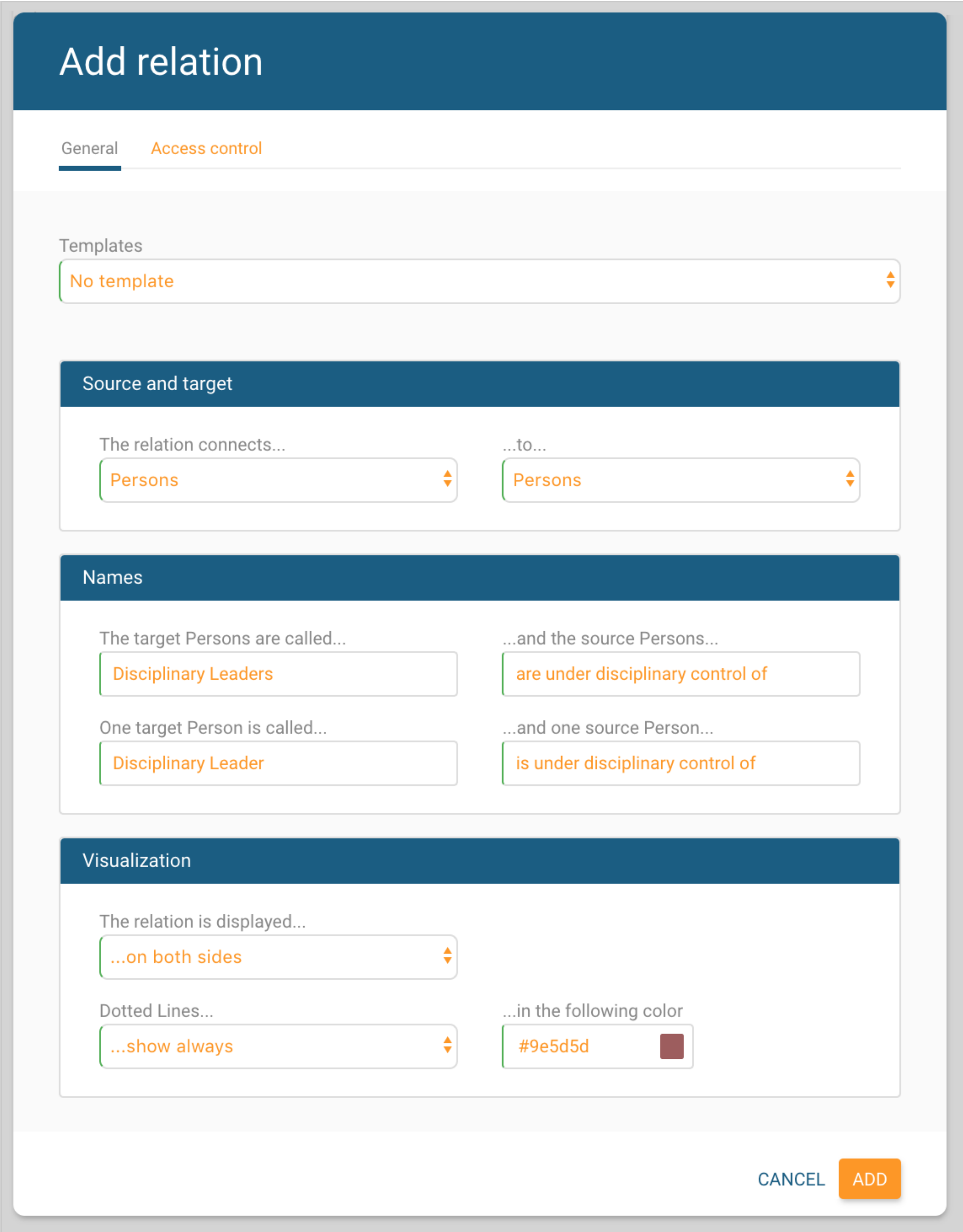


Fig. 97: Settings - Add relation- General

In the **Source and target** area you now have to specify the object types to be linked from the selection list. Under **Names** now enter the corresponding terms for the source and target object in singular and plural.

In the **Visualization** area, you define the color of the dotted lines and the kind of display. There are three options for visualizing relations:

- **The relation is displayed at the source objects**: The link is displayed in the object details (see Object details [▶ 67]) and the detail view (see Detail view [▶ 76]) is only displayed at the source object.
- **The relation is displayed at the target objects**: The link is displayed in the object details (see Object details [▶ 67]) and the detail view (see Detail view [▶ 76]) is only displayed at the target object.
- **The relation is displayed on both sides**: The link is displayed in the object details (see Object details [▶ 67]) and the detail view (see Detail view [▶ 76]) is displayed at the source object and target object.

There are also three options for the displaying the dotted line on the organization chart surface:

- **Do not display dotted lines**: The dotted lines of this link are not displayed on the organization chart surface.
- **Display dotted lines on the selected object**: The dotted lines of this link are displayed as soon as a linked object has been selected. This does not apply to objects (target objects or source objects), which should be excluded from the display in the area **The relation is displayed...**.
- **Always display dotted lines**: The dotted lines of this link are always displayed.

> **!** The dotted line display can be changed in the settings bar (see Settings Bar [▶ 71]) for the current view both in the edit mode and view mode.

In the area **...in the color** you can define the color of the dotted lines over a selection range. You can also enter the color value as a hexadecimal color definition.

Afterwards, you can also define the access to this relation in the Access Control tab.

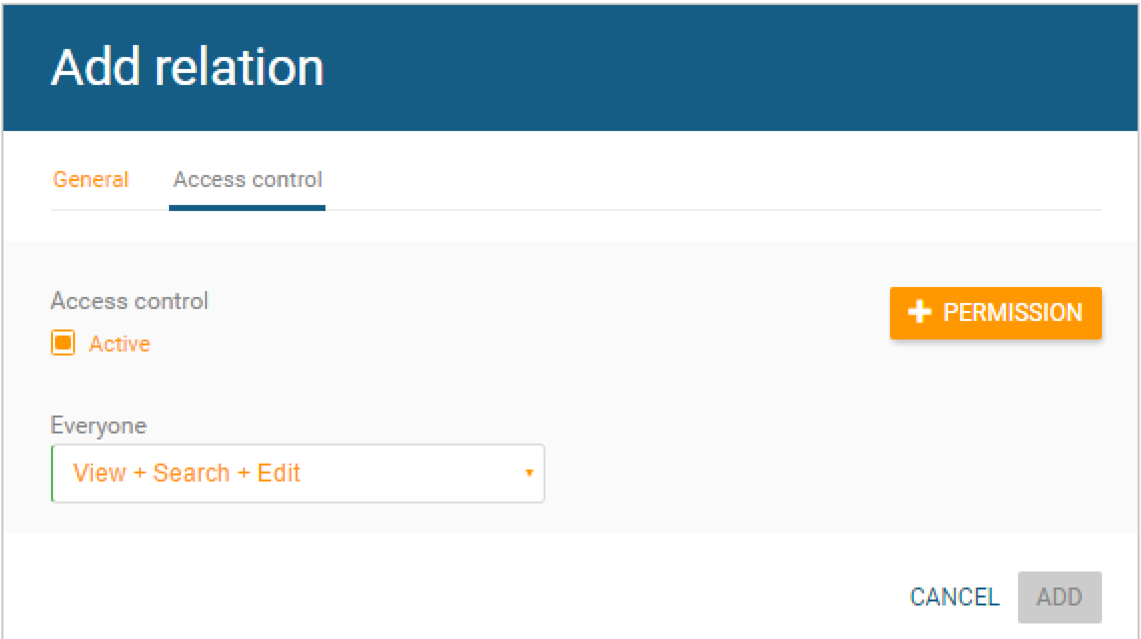


Fig. 98: Settings - Add relation- Access Control

The **Active** option must be checkmarked in order to use access control. Afterwards, in the dropdown menu under **Everyone** you define what the basic setting is for all users. There are five types of permissions:

- **No access**: The link and information for the link are hidden.
- **Display**: The link can be displayed. It is not possible to change or create the link.
- **View + Search**: The link can be displayed and the names of the source and target object can be used for the search.

- **Display + Edit** : The link can be displayed. It is possible for users with the **Edit data** permission (see Users [▶ 116]) to change and create the link.
- **View + Search + Edit**: The link can be displayed and the names of the source and target object can be used for the search. It is possible for users with the **Edit data** permission (see Users [▶ 116]) to change and create the link.

The **+ permission** button enables users / user groups to define their own access permissions. This is also possible for users / user groups that access using an access key (see Applications [▶ 119]).

! In the access protection, make sure that user groups, especially the group "Everyone", are assigned as few permissions as necessary. The reason for this lies in the fact that permissions assigned via groups cannot be reduced from other settings but can only be extended.

Example: The group "Everyone" is assigned the permission **View + Search + Edit** and the user group "External" is assigned the permission **No access**. Since group rights are not reduced and the group "Everyone" applies to every user, the group "External" therefore also receives the permission **View + Search + Edit.**
In this case, the correct allocation of the rights would be such that the group "Everyone" and group "External" would receive the permission **No access**, and all users / user groups that should have more permission would be specifically assigned this.

2.5 Scheduling

Here you can create regular data imports. This feature allows you to keep your organization chart up to date by downloading data from the data source used according to a set schedule.

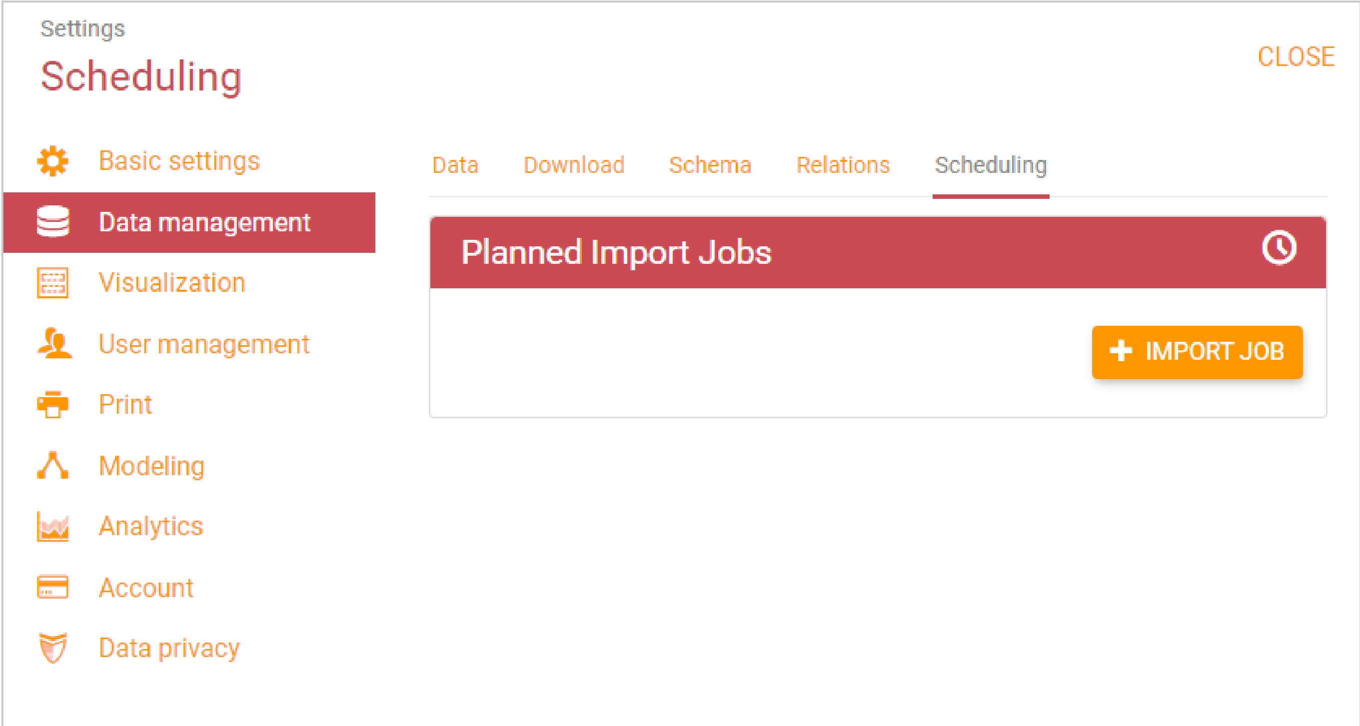


Fig. 99: Settings - Planning

By clicking on **+ Import Job**, a new Job can be created.

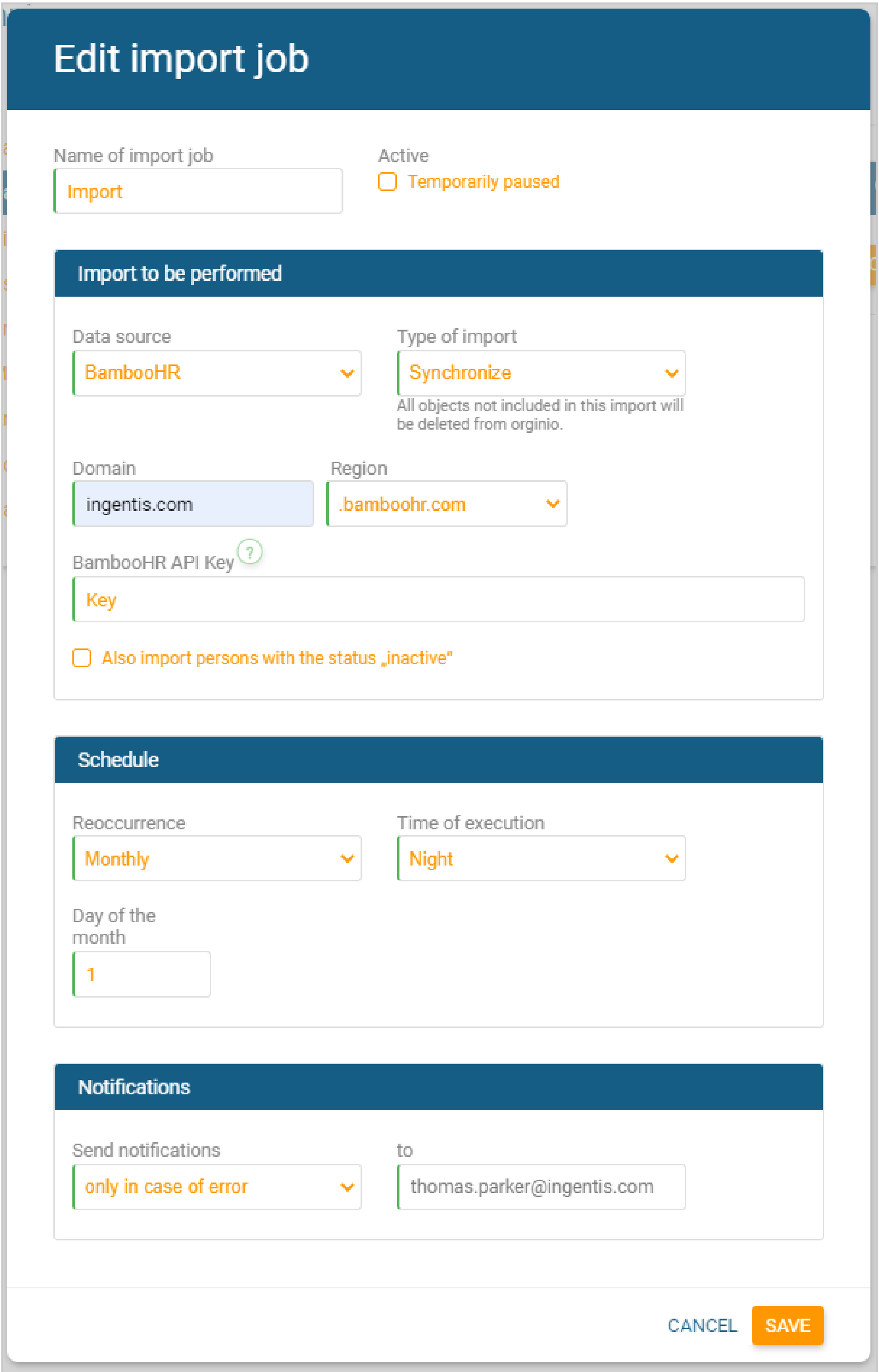


Fig. 100: Data management - Planning

In **Import to be performed**, the data source and the required credentials are entered. Under **Schedule** you can set the repetition, the time and the desired day of the month. In **Notifications**, it is possible to set why and to which e-mail address the note is sent.

See also

Data Import [▸ 10]

2.5.1 Import API

To enable an automated import of an Excel/CSV data source, an import API is used that is controlled with scripts. Attention: The import API is available from the feature set "proceed PERFECT".

Preparation

1. Perform a normal data import

2. The file headers must match the file that will be automatically imported, and all headers must be mapped to a field in orginio (have a check mark).

3. Create an "access key" under User Management / Application Type: other application Permissions: Edit data

Create import script

Next, you need to create an import script. Here you can find examples for the scripts. Attention: The scripts still have to be adapted to your configuration!

Example Script with cURL for a Windows batch script:

```
# Please adapt the values in the first three lines
SET ORGINIO_API_KEY=PASTE_API_KEY_HERE
SET URI=https://DOMAIN_OF_YOUR_ORGINIO/api/import/excel-csv/v1
SET IMPORT_FILE_PATH=PATH_TO_YOUR_XLSX_OR_CSV_FILE

echo on
curl -v "%URI%" -k -H "Authorization: Bearer %ORGINIO_API_KEY%" -F "file=@%IMPORT_FILE_PATH%" -F
"meta={}"
```

Example Script for Powershell

```
# Please adapt the values in the first three lines
$orginioApiKey = 'PASTE_API_KEY_HERE'
$uri = 'https://DOMAIN_OF_YOUR_ORGINIO/api/import/excel-csv/v1';
$importFilePath = 'PATH_TO_YOUR_XLSX_OR_CSV_FILE';

Add-Type -AssemblyName System.Web

$headers = @{'Authorization'="Bearer $orginioApiKey"};
$fileBytes = [System.IO.File]::ReadAllBytes($importFilePath);
$mimeType = [System.Web.MimeMapping]::GetMimeMapping($importFilePath);
$fileEnc = [System.Text.Encoding]::GetEncoding('ISO-8859-1').GetString($fileBytes);
$boundary = [System.Guid]::NewGuid().ToString();
$LF = "`r`n";
```

```
# if csv file, then change the filename from 'none' to e.g. 'filename.csv'
$bodyLines = (
"--$boundary",
"Content-Disposition: form-data; name=`"meta`"",
"Content-Type: application/json$LF",
"{}",
"--$boundary",
"Content-Disposition: form-data; name=`"file`"; filename=`"none`"",
"Content-Type: $mimeType$LF",
$fileEnc,
"--$boundary--$LF"
) -join $LF

Invoke-RestMethod -Uri $uri -Method Post -ContentType "multipart/form-data; boundary=`"$boundary`"" -Headers $headers -Body $bodyLines
```

Example Script with cURL for Linux (MAC)

```
//Please adapt the values in the first three lines
export ORGINIO_API_KEY='PASTE_API_KEY_HERE'
export URI='https://DOMAIN_OF_YOUR_ORGINIO/api/import/excel-csv/v1'
export IMPORT_FILE_PATH='PATH_TO_YOUR_XLSX_OR_CSV_FILE'

curl -v "$URI" -k -H "Authorization: Bearer $ORGINIO_API_KEY" -F "file=@$IMPORT_FILE_PATH" -F 'meta={}'
```

Limits

Max of 3 requests per 5 minutes per customer

Parameters

By default the import is working as "sync".

If you want to use it in "normal" mode the URI needs the additional REST parameter "normal".

Example:

$uri = 'https://DOMAIN_OF_YOUR_ORGINIO/api/import/excel-csv/v1/normal';

Notes

As the import is done with the API key and with the permissions this key has the import might fail because of some ACL definitions on objects or fields, so check the ACL on the fields the import is using.

See also

Applications [119]

3. Visualization

In the visualization area you make settings that affect the appearance of the organization chart.

3.1 Standard Template

In this area you can select the box design that should be considered as the default setting for each user. From the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]) it is also possible to create your own box designs and to define them for the view mode.

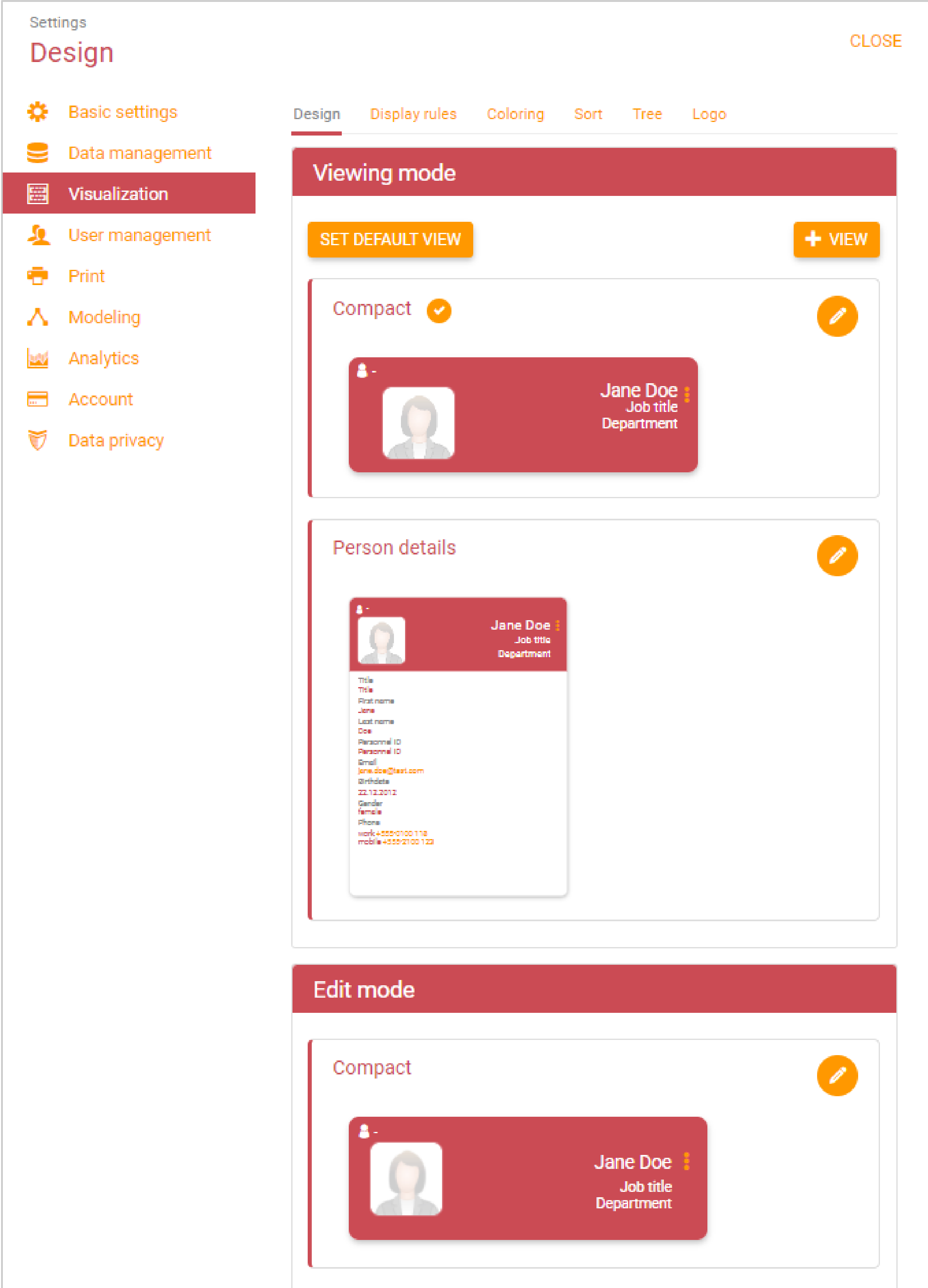


Fig. 101: Settings - Template

The **Define standard view** button enables you to define the view or the design for the entire organization chart.

Using the **+ view** button, you can create your own views and box designs for person details from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]).

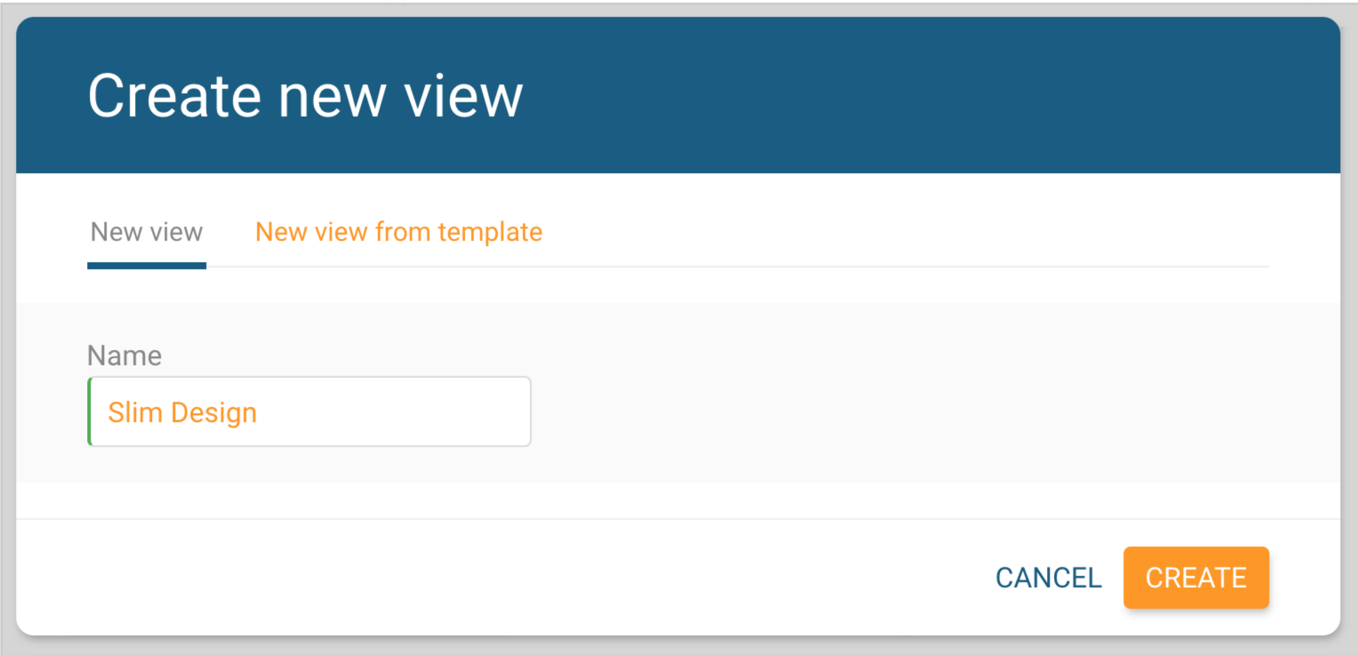


Fig. 102: Settings - Create your own template

In the **Name** area you assign the name of the template view. Via **Create** you are taken to the settings of the new template.

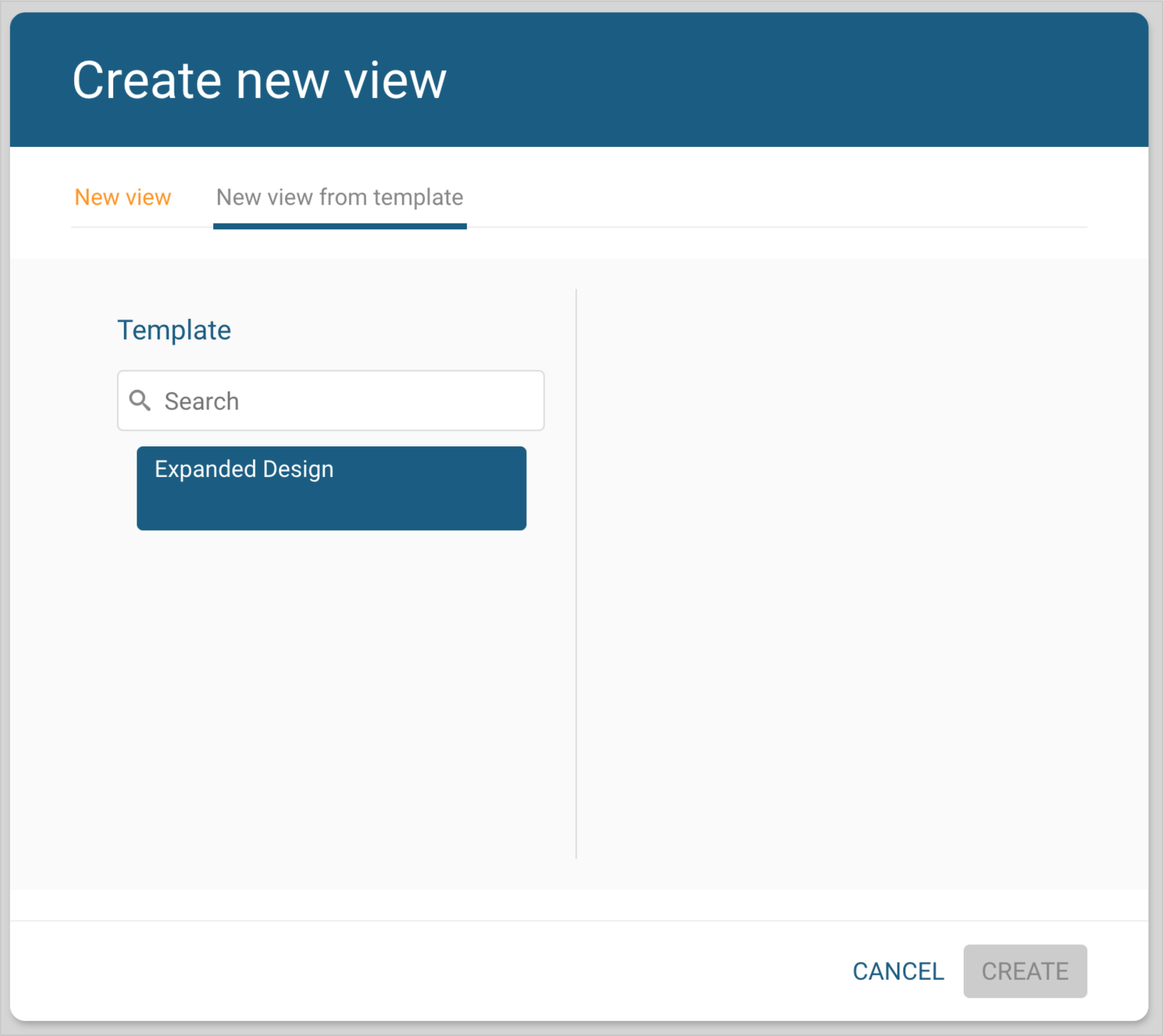


Fig. 103: Settings - Create your own template from templates

It is also possible to create the new template based on a previous template. You can filter your existing, self-created templates using the search bar.

If you select a template and click on **Create**, all the settings will be displayed pre-filled in the next window.

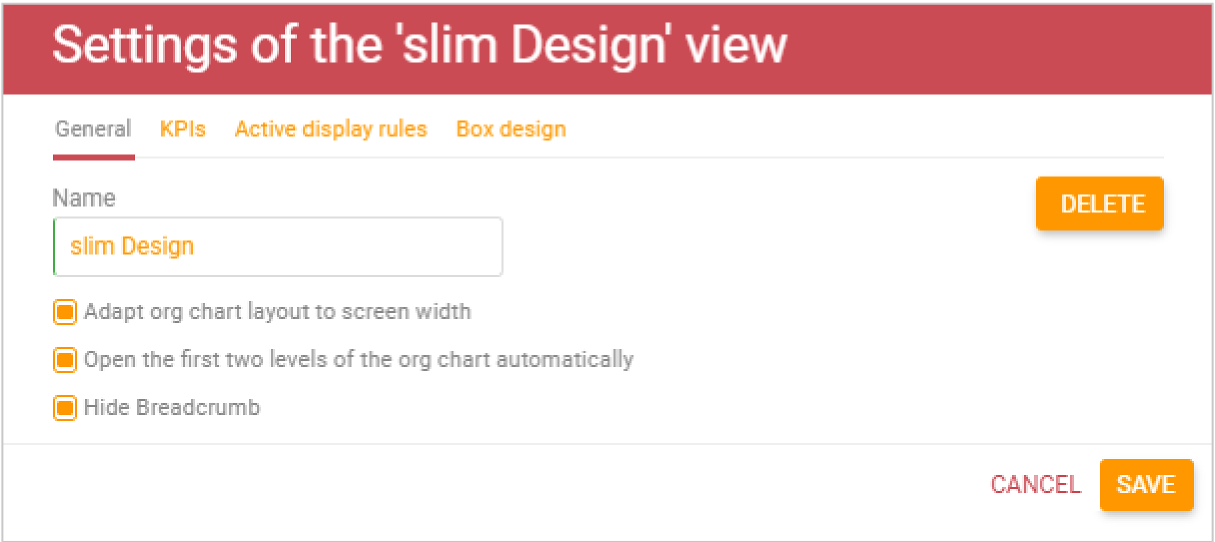


Fig. 104: Settings - Create your own template - General

Adapt org chart layout to screen width adjusts the number of boxes per level to the width of the screen.

By activating the button **First open two levels of the organization chart automatically**, the first two levels are opened automatically when retrieving the organization chart. The root object is located at the level zero.

Hide breadcrumb hides the small navigation bar at the top right of the viewing mode

Fig. 105: Settings - Create your own template- Active display rules

Under **Active display rules** the existing display rules [▶ 109] can be activated preselected. This preselection applies to all users. On the organization chart surface the users can activate or deactivate (see Settings Bar [▶ 151]) display rules for their own account using the settings bar .

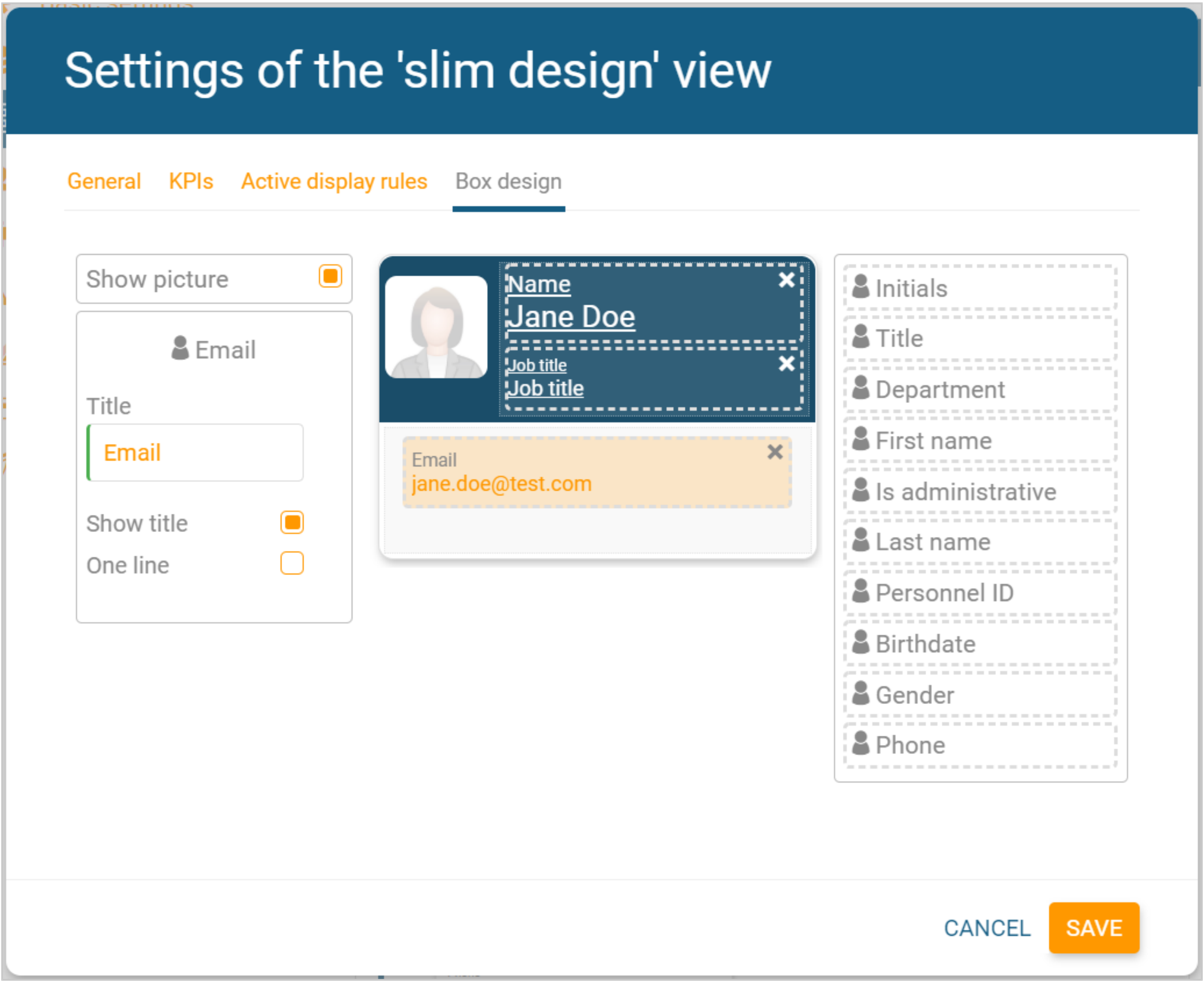


Fig. 106: Settings - Create your own template - Box designer

The appearance of the personnel detail box can be defined in the box designer.

On the left-hand side you can select whether the employee photo should be displayed and how the currently selected data field should be displayed. If you set the **Display title** checkmark, the title of the data field will be displayed in the box. If you set the **Single-line** checkmark, the title of the data field will be displayed in the same line as the value of the data field.

A preview of the box can be seen in the center of the dialog.

The data fields displayed in the right-hand selection list are moved into the box via drag & drop. All data fields (in the case of a position hierarchy and department hierarchy also data fields of other object types) can be integrated in the person details box.

On the left-hand side, the display design of the data field is customized.

If you use a department hierarchy (see Selection of the appropriate structure [▶ 8]), the following designs are available in the view mode area by default:

Compact

In the **Compact** view the department name is displayed on the right at the top. On the left next to the department name, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▶ 164])). The analytical value Headcount is selected here by default. On the right next to the department

name is the … button. This button takes you to the detail view (see Detail view [▸ 76]).
Furthermore, the profile pictures and the employee names (Title + First name + Last name) of the managers are displayed in the upper area. In the lower area of the box, the profile pictures and the employee names (Title + First name + Last name) of the department employees are displayed below each other. If a photo for the employee was stored by the user with the **Edit data** permission, (see Users [▸ 116]) the picture will be displayed next to the employee name. If no photo was uploaded, the initials of the employee will be displayed. If you click on an employee in display mode, the job title will be displayed in the organization box below the employee name. The display of the job title can be deactivated using the settings bar (see Settings Bar [▸ 151]). If the position is unfilled, only the job title is displayed.

Detailed

In the **Detailed** view the department name is displayed at the top right. On the left next to the department name, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164])). The analytical value Headcount is selected here by default. On the right next to the department name is the … button. This button takes you to the detail view (see Detail view [▸ 76]).
Furthermore, the profile pictures and the job titles of the managers are displayed in the upper area. In the lower area of the box, the profile pictures and the job titles of the department employees are displayed next to each other. Up to 3 employees are displayed in a line. If there are more employees, a new line is created. If a photo for the employee was stored by the user with the **Edit data** permission, (see Users [▸ 116]) the picture will be displayed next to the employee name. If no photo was uploaded, the initials of the employee will be displayed. If the position is unfilled, only the job title is displayed.

Person details

In the **Person details** view the department name is displayed at the top right. On the left next to the department name, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164])). The analytical value Headcount is selected here by default. On the right next to the department name is the … button. This button takes you to the detail view (see Detail view [▸ 76]). Furthermore, one box is displayed for each employee in this view. The employee name (title + first name + last name) and job title are displayed next to the employee photo. Furthermore, all existing person data fields are displayed. Excluded from this are data fields that are not enabled for the current user via the access control (see Schema [▸ 87]). Likewise, fields are not displayed here if in the schema (see Schema [▸ 87]) under **display in the detail view** the option **Only if information available** was selected and the corresponding field is empty, or **Always in view mode** was selected.

If you use a position hierarchy (see Selection of the appropriate structure [▸ 8]), the following designs are available in the area of the view mode by default:

Compact

In the **Compact** view, the job title is displayed at the top right. On the left next to the job title, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164])). The analytical value Headcount is selected here by default. On the right next to the job title is the … button. This button takes you to the detail view (see Detail view [▸ 76]). Furthermore, the position held by employees (Title + First name + Last name) is displayed. If a photo for the employee was stored by the user with the **Edit data** permission, (see Users [▸ 116]) the picture will be displayed next to the employee name. If no photo was uploaded, the initials of the employee will be displayed.

Person details

In the **Person details** view, the job title is displayed at the top right. On the left next to the job title, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164])). The analytical value Headcount is selected here by default. On the right next to the job title is the … button. This button takes you to the detail view (see Detail view [▸ 76]). Furthermore, one box is displayed for each employee in this view. The employee name (title + first name + last name) is displayed next to the employee photo. Furthermore, all existing person data fields are displayed. Excluded from this are data fields that are not enabled for the current user via the access control (see Schema [▸ 87]). Likewise, fields are not displayed here if in the schema (see Schema [▸ 87]) under **display in the detail view** the option **Only if information available** was selected and the corresponding field is empty, or **Always in view mode** was selected.

If you use a person hierarchy (see Selection of the appropriate structure [▸ 8]), the following designs are available in the area of the view mode by default:

Compact

In the **Compact** view, the name of the employee (title + first name + last name) is displayed at the top right. On the left next to the employee name, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164])). The analytical value Headcount is selected here by default. On the right next to the employee name is the … button. This button takes you to the detail view (see Detail view [▸ 76]). Furthermore, the job title and area name are displayed. If a photo for the employee was stored by the user with the **Edit data** permission, (see Users [▸ 116]) the picture will be displayed next to the employee name.

Person details

In the **Person details** view, the name of the employee (title + first name + last name) is displayed on the right at the top. On the left next to the employee name, analytical values are displayed in the box (from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164])). The analytical value Headcount is selected here by default. If a photo for the employee was stored by the user with the **Edit data** permission, (see Users [▸ 116]) the picture will be displayed on the left next to the employee name. On the right next to the employee name is the … button. This button takes you to the detail view (see Detail view [▸ 76]). In the lower area, all existing person data fields are displayed. Excluded from this are data fields that are not enabled for the current user via the access control (see Schema [▸ 87]). Likewise, fields are not displayed here if in the schema (see Schema [▸ 87]) under **display in the detail view** the option **Only if information available** was selected and the corresponding field is empty, or **Always in view mode** was selected.

3.2 Display rules

Objects in the organization chart can be displayed or hidden using display rules. For example, certain employees can be removed from the display or positions such as staff positions can be colour-coded.

! Note for position hierarchies and department hierarchies (see Selection of the appropriate structure [▸ 8]):
Only display rules of the hide and color kind can be defined for data types that do not have their own hierarchy box.

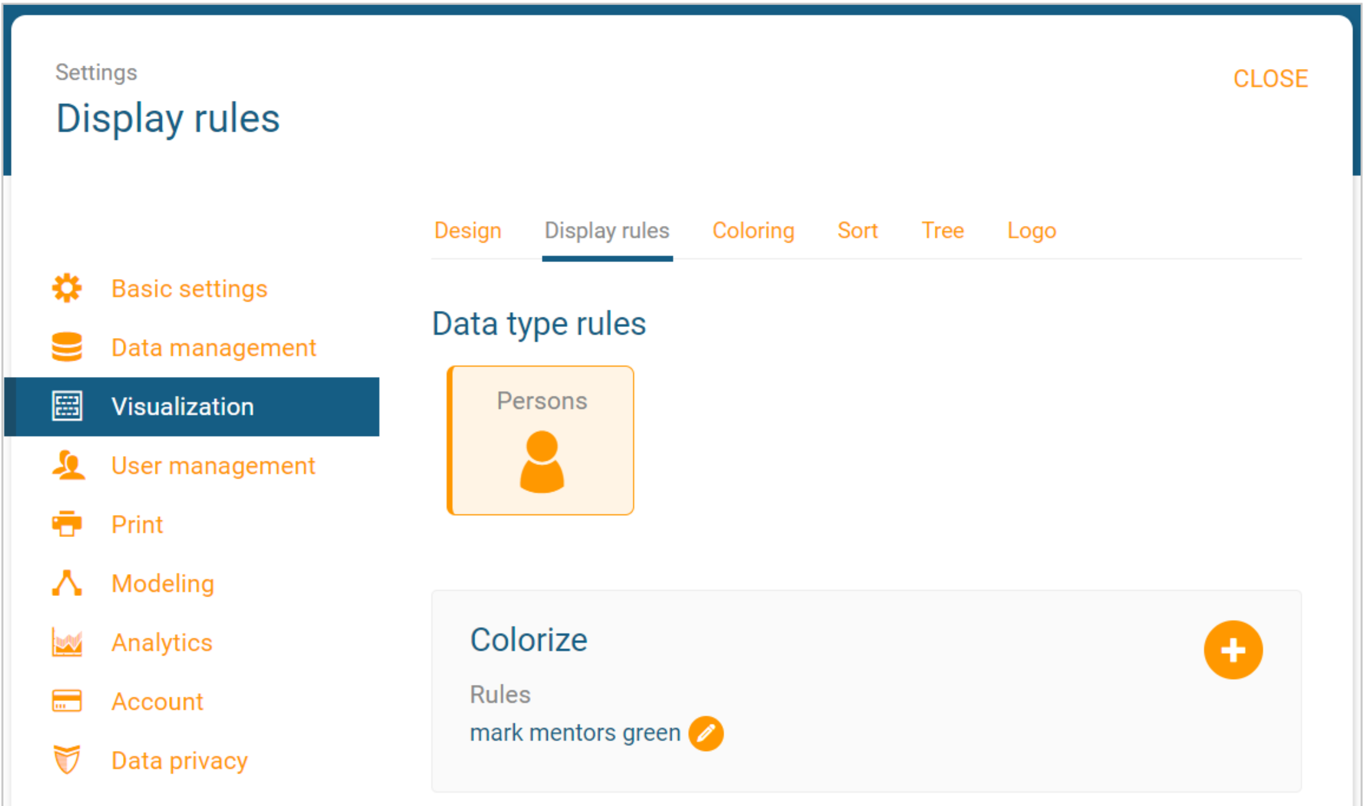


Fig. 107: Settings - Display rules

First define which object the rule should be created for. Then decide how the information should be highlighted. An effect is selected:

- **Hide**: A transparency is placed onto the object in the organization chart so that it is not in focus visually. One of four opacity levels can be selected in the settings.
- **Color in**: The object is highlighted in color. The HEX color code can be entered in the settings.
- **Mark at the top left:** The object is marked with a symbol at the top left edge. A square and a rounded shape in three sizes each are available in the settings for this highlighting.
- **Mark at the bottom left:** The object is marked with a symbol at the bottom left edge. A square and a rounded shape in three sizes each are available in the settings for this highlighting.
- **Mark at the top right:** The object is marked with a symbol at the top right edge. A square and a rounded shape in three sizes each are available in the settings for this highlighting.
- **Mark at the bottom right:** The object is marked with a symbol at the bottom right edge. A square and a rounded shape in three sizes each are available in the settings for this highlighting.

Clicking on the Edit symbol behind the effect brings you to the settings dialog.

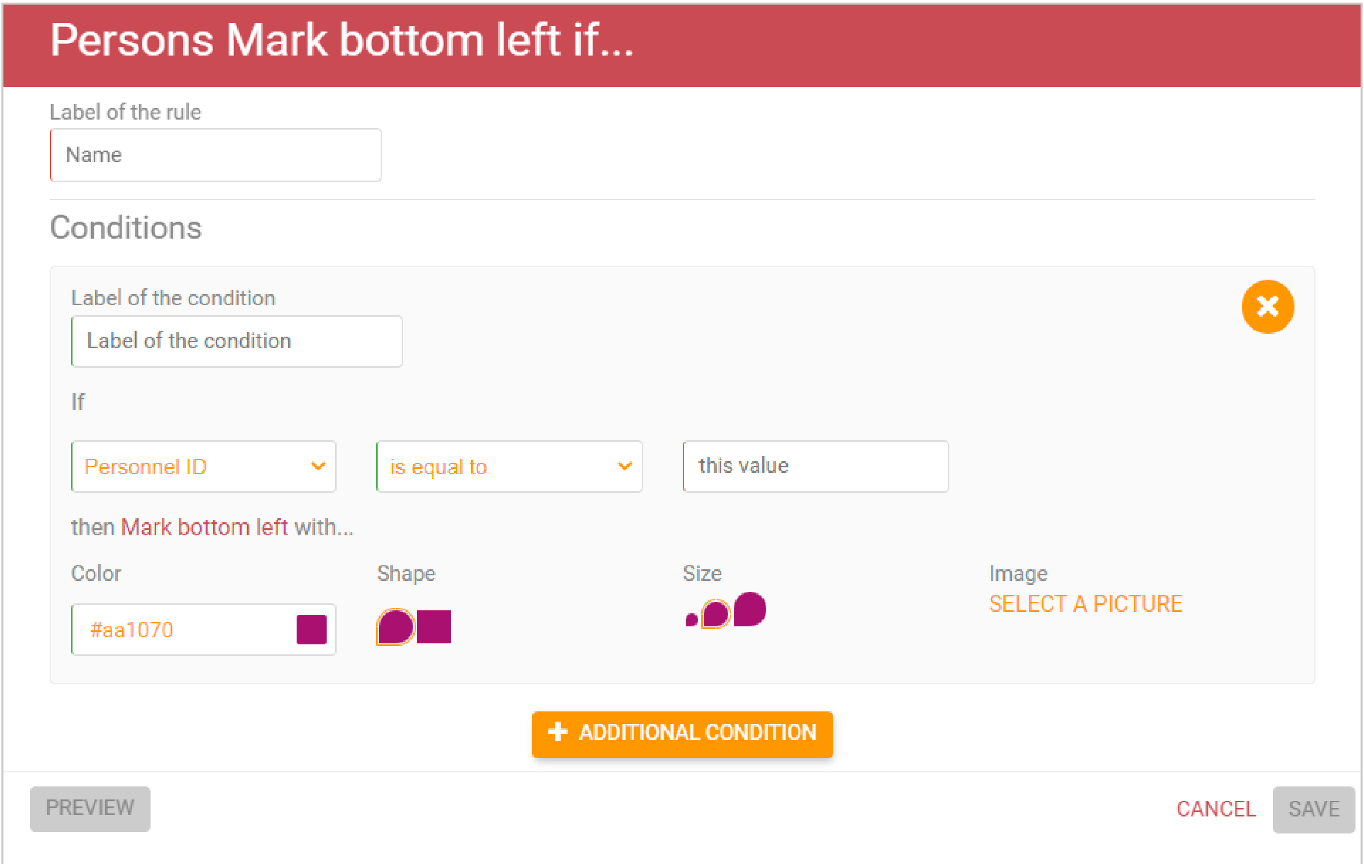


Fig. 108: Settings - Create display rule

- In this window, a **name** must first be entered for the display rule.
- The **X** button deletes the display rule.
- In the **Conditions** area, the objects for which the display rule is to apply are defined.
- A **label** for the condition must be entered.
- The first drop-down box contains all attributes of the object for selection. In addition, as of the feature set proceed Perfect (see Feature-Sets [▶ 164]) key figures are also available for selection in this menu. The parameter is selected in the second drop-down box and the value in the third drop-down box.
- In the area "then mark top left with ..." the colour, the shape as well as the size of the mark can then be selected. It is also possible to insert an image as a marker
- Additional conditions and effect specifications can be created using the **+ Additional condition** button.

! The conditions are processed in series from top to bottom. If there are two identical conditions with different effects, the first condition that was defined in the dialog takes effect.

If you click on **Preview**, the defined settings can be seen in the organization chart.

3.3 Color Scheme

Here, you can select the different default color schemes that you want to use for the view. From Feature Set proceed PERFECT and higher (see Feature-Sets [▶ 164]) you can define your own color schemes (see Your own color scheme [▶ 112]).

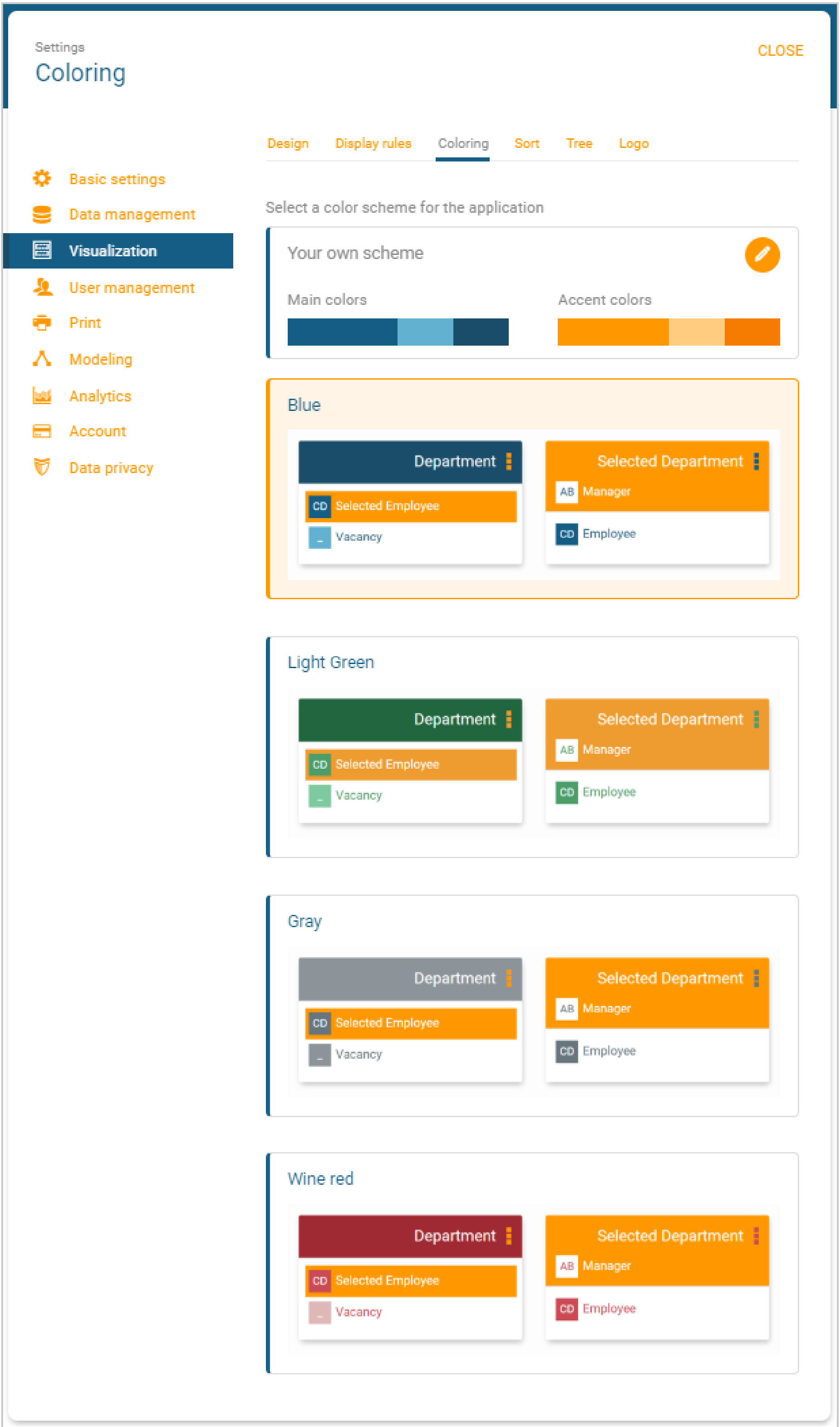


Fig. 109: Settings - Coloring

3.4 Your own color scheme

In this dialog you can create your own color scheme. The **Main color** can be found in the header line of the box as well as in the complete orginio view. When you select a box, the header line is colored in the accent color. After selecting the **Main** color and **Accent color** their dark and light gradations can be generated by clicking on **Auto**.

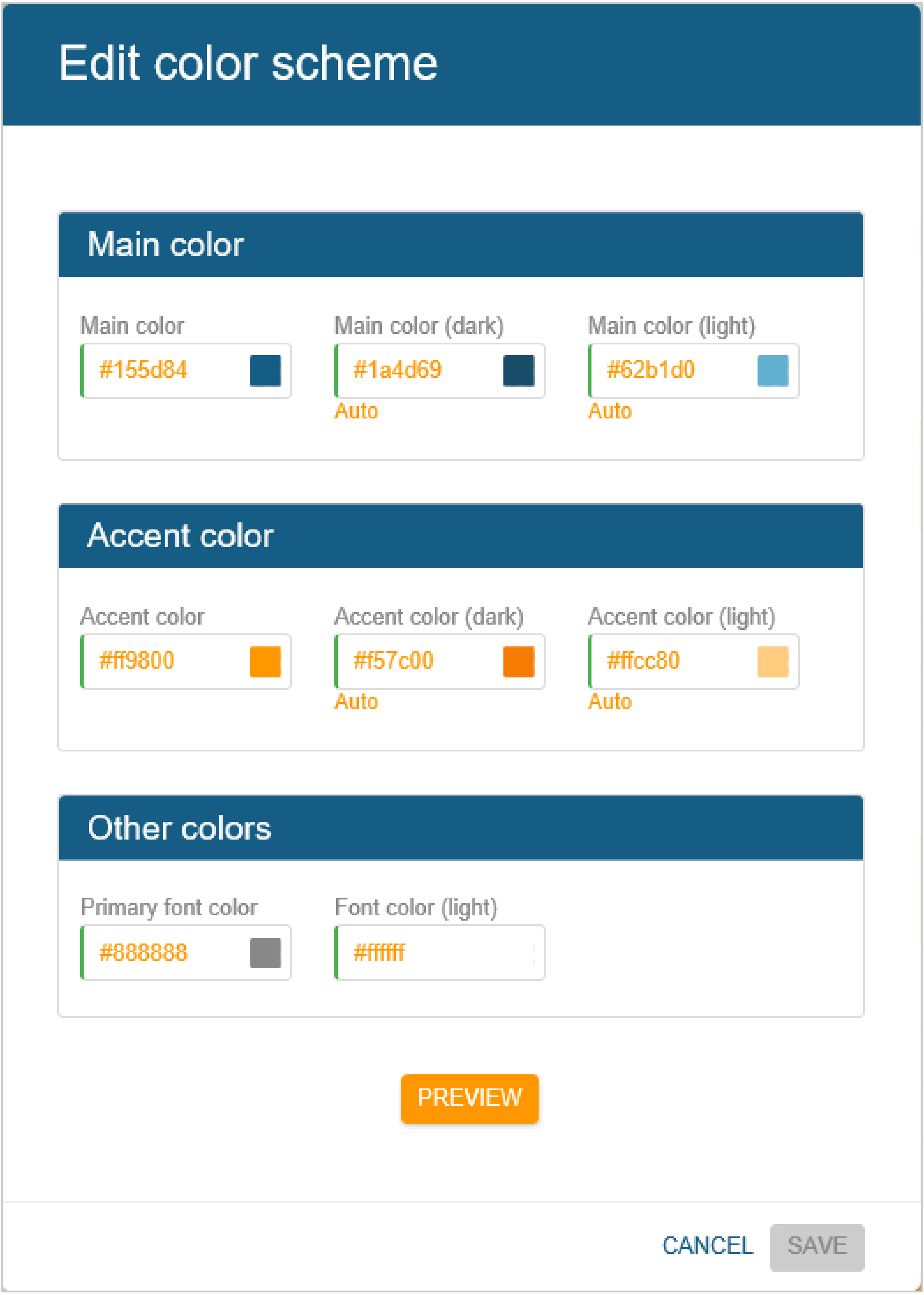


Fig. 110: Settings - Your own color scheme

3.5 Sort

Here you can set how the objects are sorted.

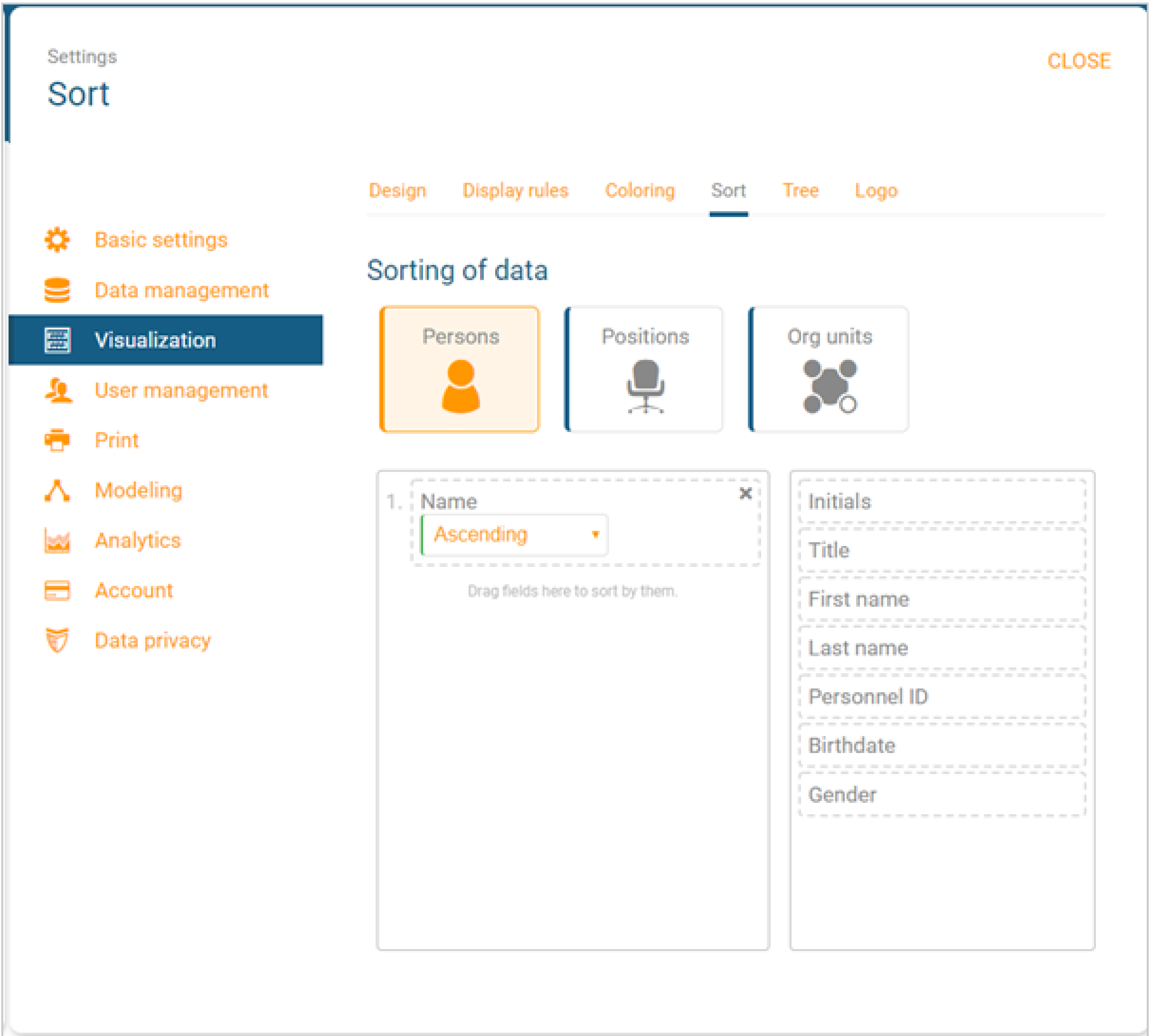


Fig. 111: Visualization - Sort

For every object type it is possible to set the attributes for the sorting. You can also set if the sorting should be ascending or descending.

3.6 Tree

Here you can set which object types are displayed in the organization chart.

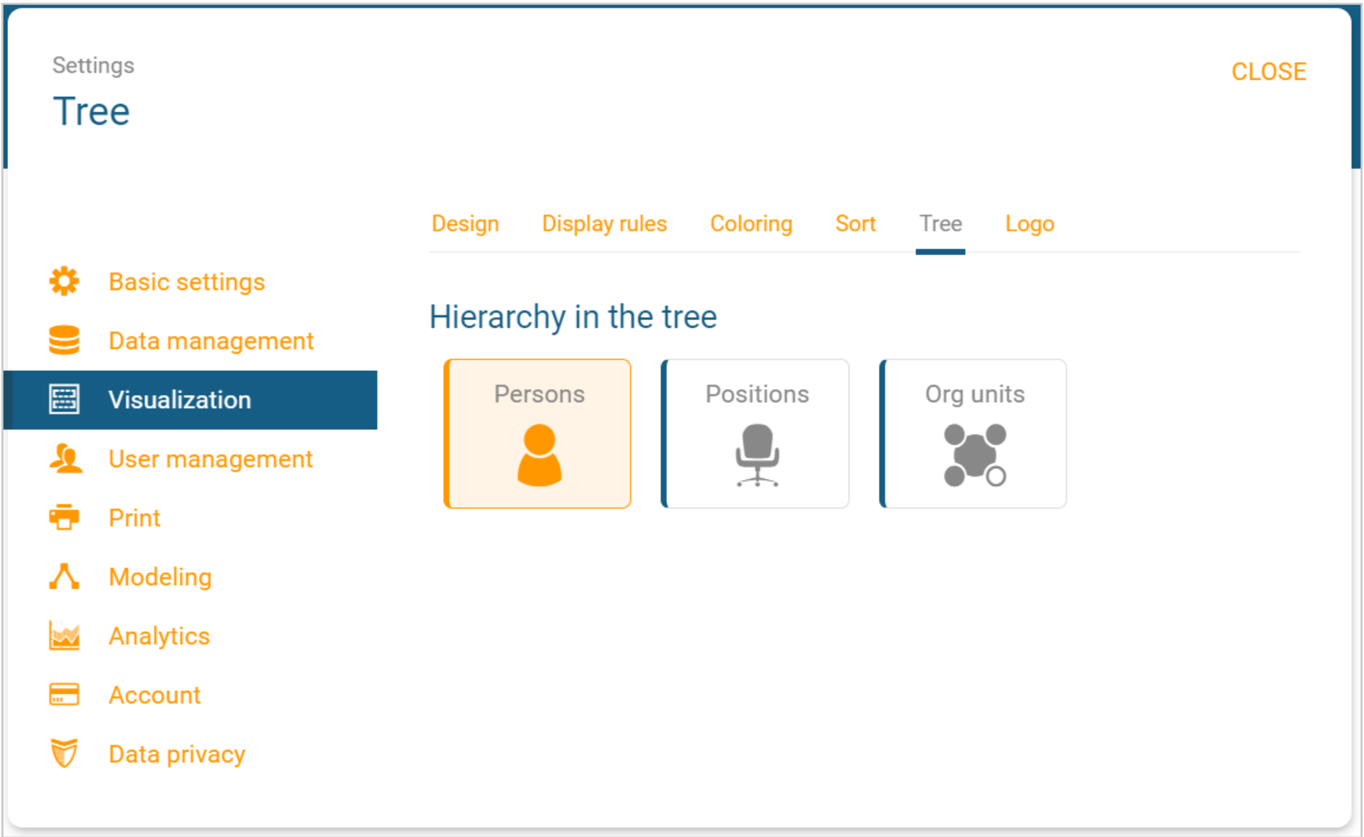


Fig. 112: Visualization - Tree

- With D–P-P-Structure (Department hierarchy) departments get displayed, this cannot be changed.
- With P-P-Structure (Position hierarchy), you can select if positions or organizational units get displayed.
- With P-Structure (Person hierarchy), you can select between persons, positions or organizational units.

3.7 Company logo

You can upload the **Company logo** from the Feature Set proceed PERFECT or higher (see Feature-Sets [▶ 164]). The logo is displayed in display and print of the organization chart is displayed at the bottom right. You can drag the image file into the dotted box via drag & drop or select it using the **Select a file** button. The GIF, PNG, JPEG and JPG image formats are supported.

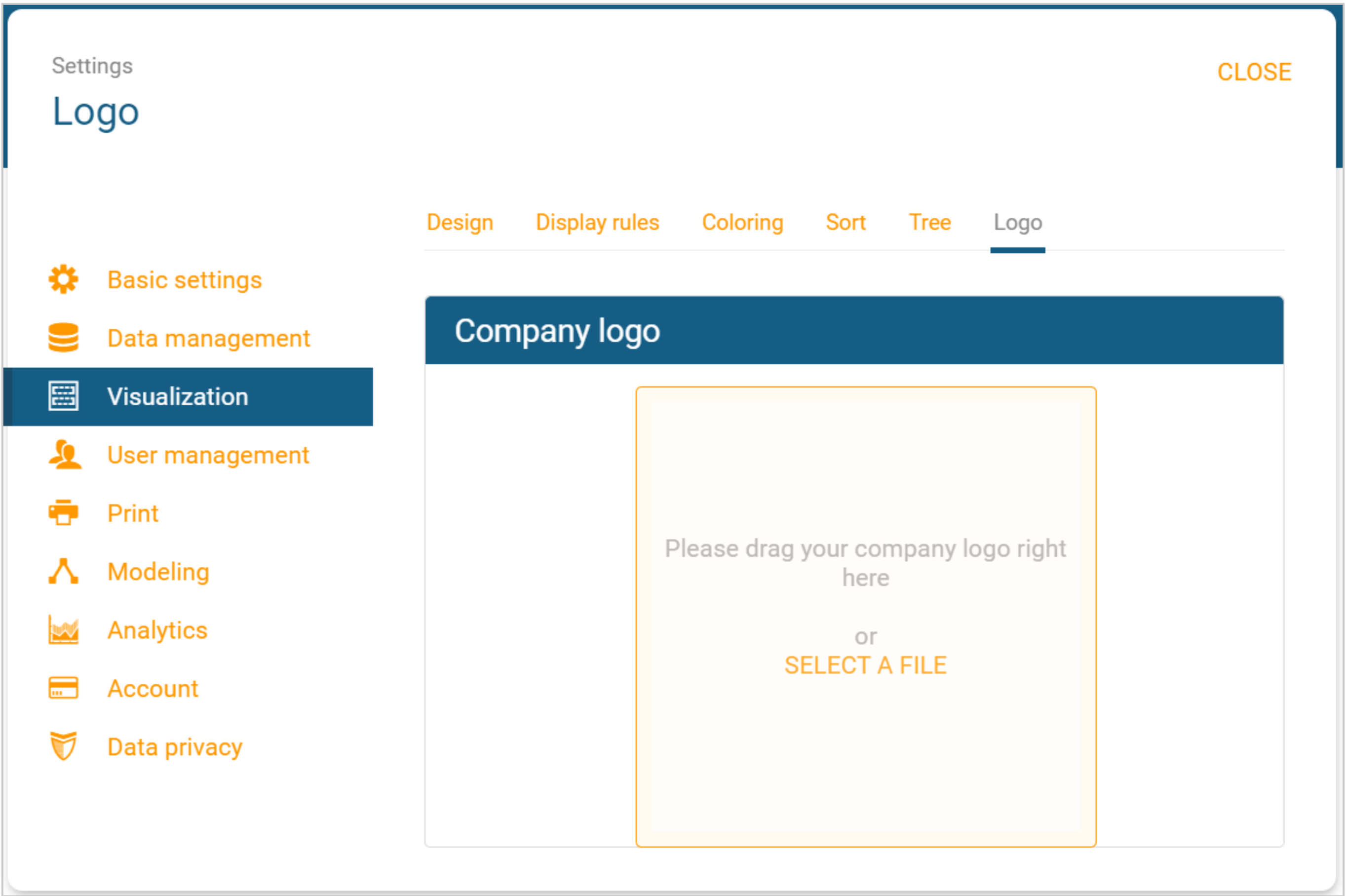


Fig. 113: Settings - Company logo

4. User Management

In the User Management you can create, authorize and delete users and combine them into groups.

4.1 Users

In this area all users of this orginio instance are visible. You can add new users using the **+ Users** button. Under **Permissions** you can see which permissions each user has. The pen button allows you to edit the permissions of individual users. You can click the **x** button to delete the corresponding user.

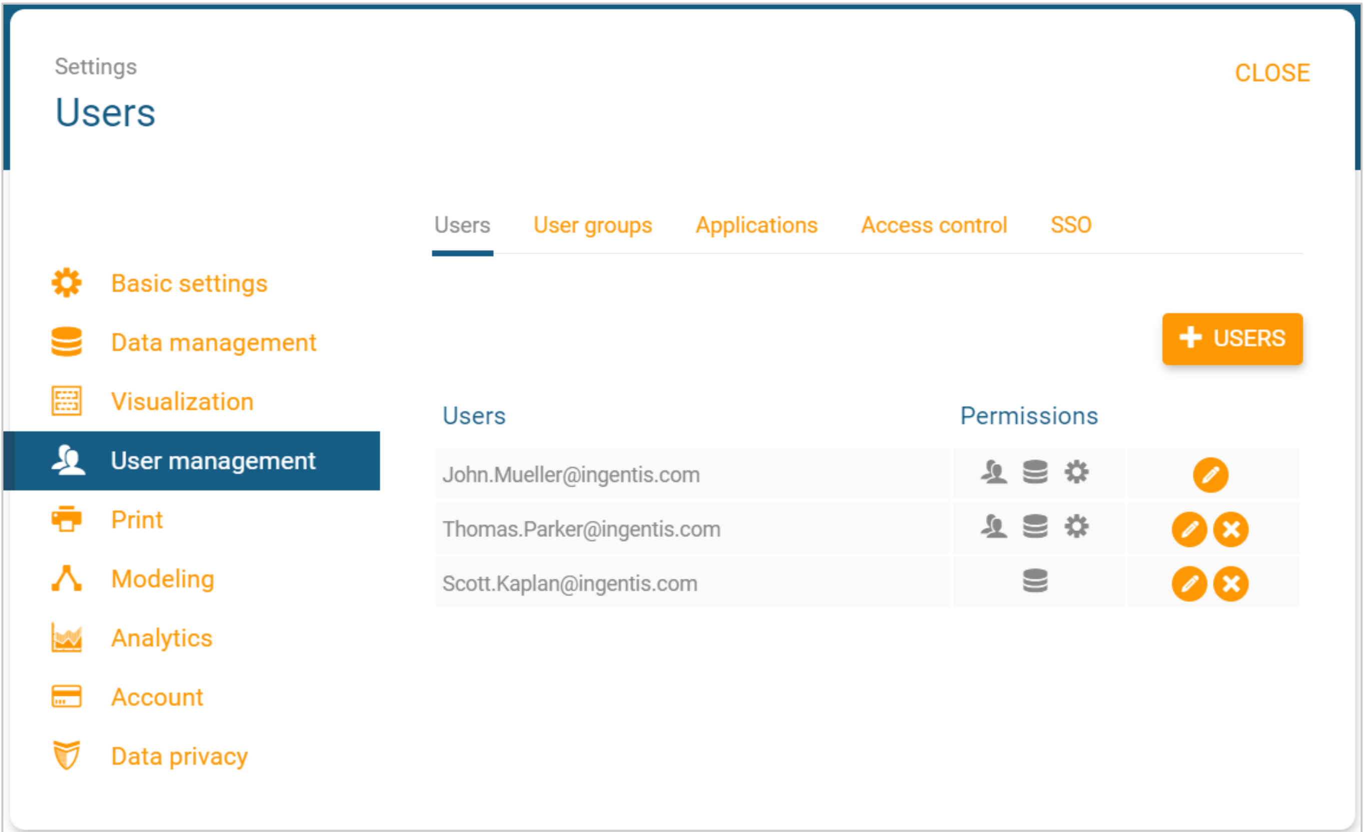


Fig. 114: Settings - Users

Users can have the following permissions:

- **Edit data** The user can move, edit, import, create and delete data.
- **Manage user:** The user can create new users / user groups and delete existing ones. He can only assign / withdraw permissions that he has himself.
- **Manage company account**: The user can make settings relating to the orginio account, such as deleting the account, storing account data and changing the Feature Set (see Feature-Sets [▸ 164]).

4.2 User groups

To assign permissions that should apply to several users, you can combine **Users** into **User groups**.

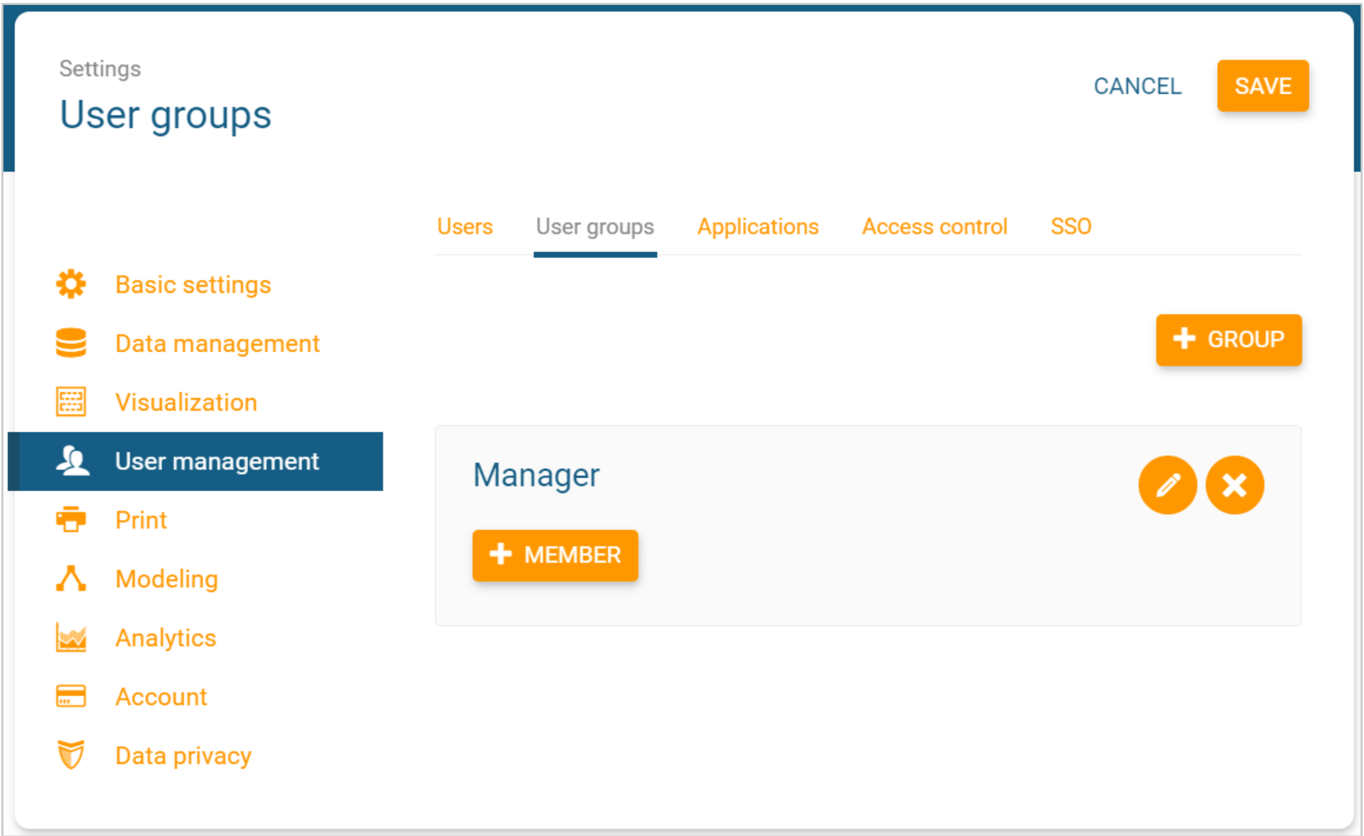


Fig. 115: Settings - User groups

To create a **User group**, click on the **+ Group** button. You are then prompted to choose a name for the user group. After confirming the name, the group is created without members.

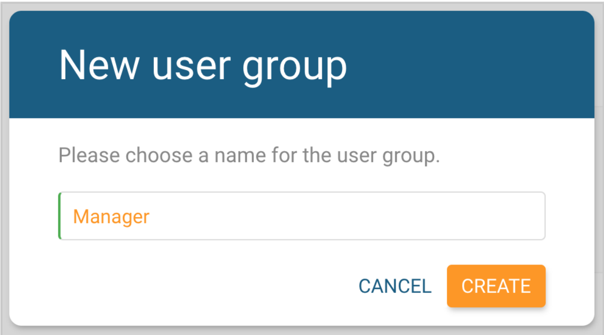


Fig. 116: Settings - Create new user group

To assign **a user or application** to a user group, now click on the **+ Member** button. In the **Identity** area a selection list can be opened. This contains all users and linked applications.

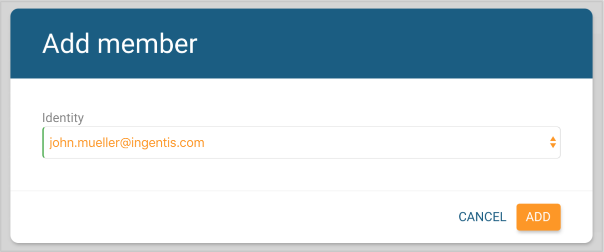


Fig. 117: Settings - Add user to user group

To delete a user group, click on the **x** button behind the group name and then on **Delete**.

4.3 Applications

Under Applications you can generate an access key, which can be added to other applications (e.g. Intranet via iFrame or Ingentis org.manager), in order to retrieve information from orginio.

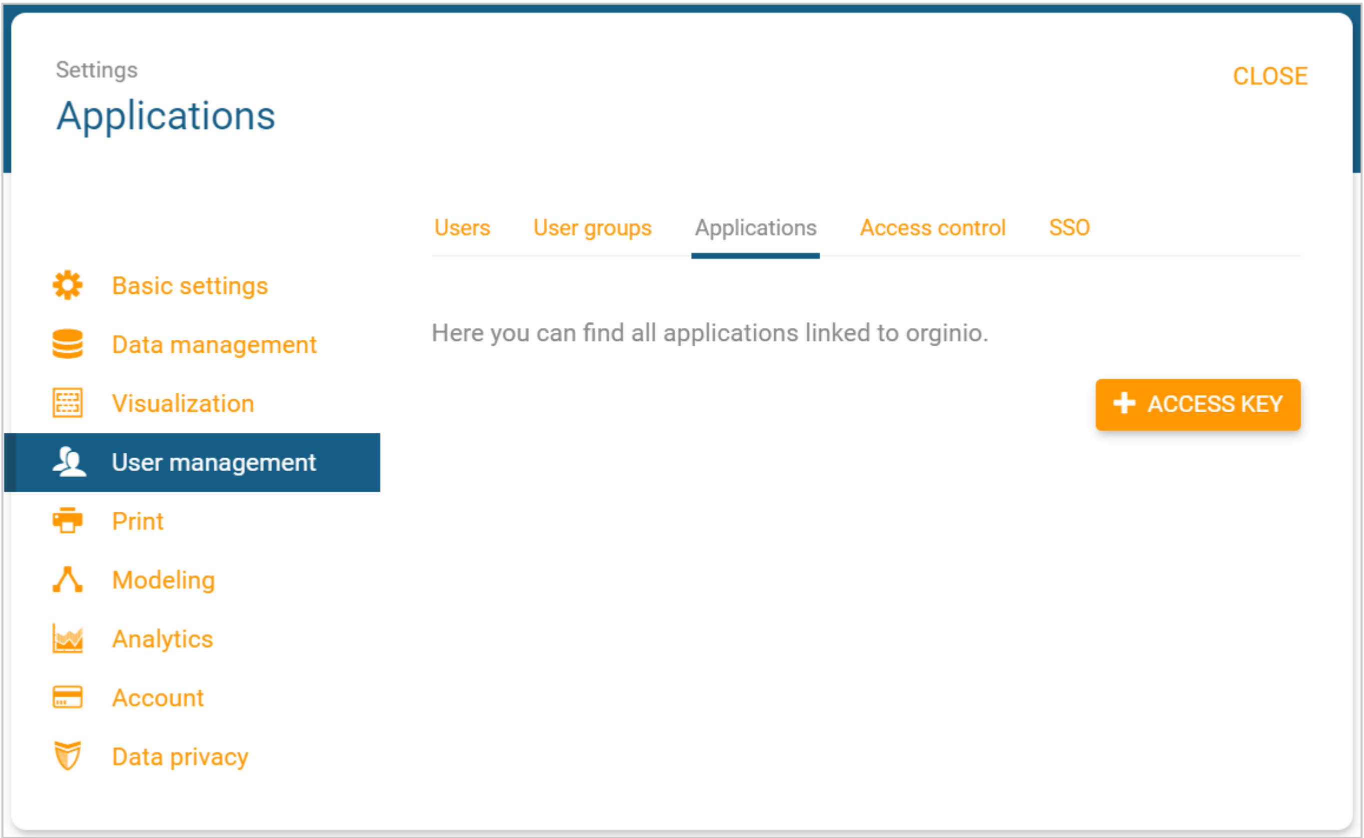


Fig. 118: Settings - Applications

To link an application to orginio, click on the **+ Access key** button. Now select what **type of application** it is. You have to assign a name. After confirmation, the applications will appear in this list.

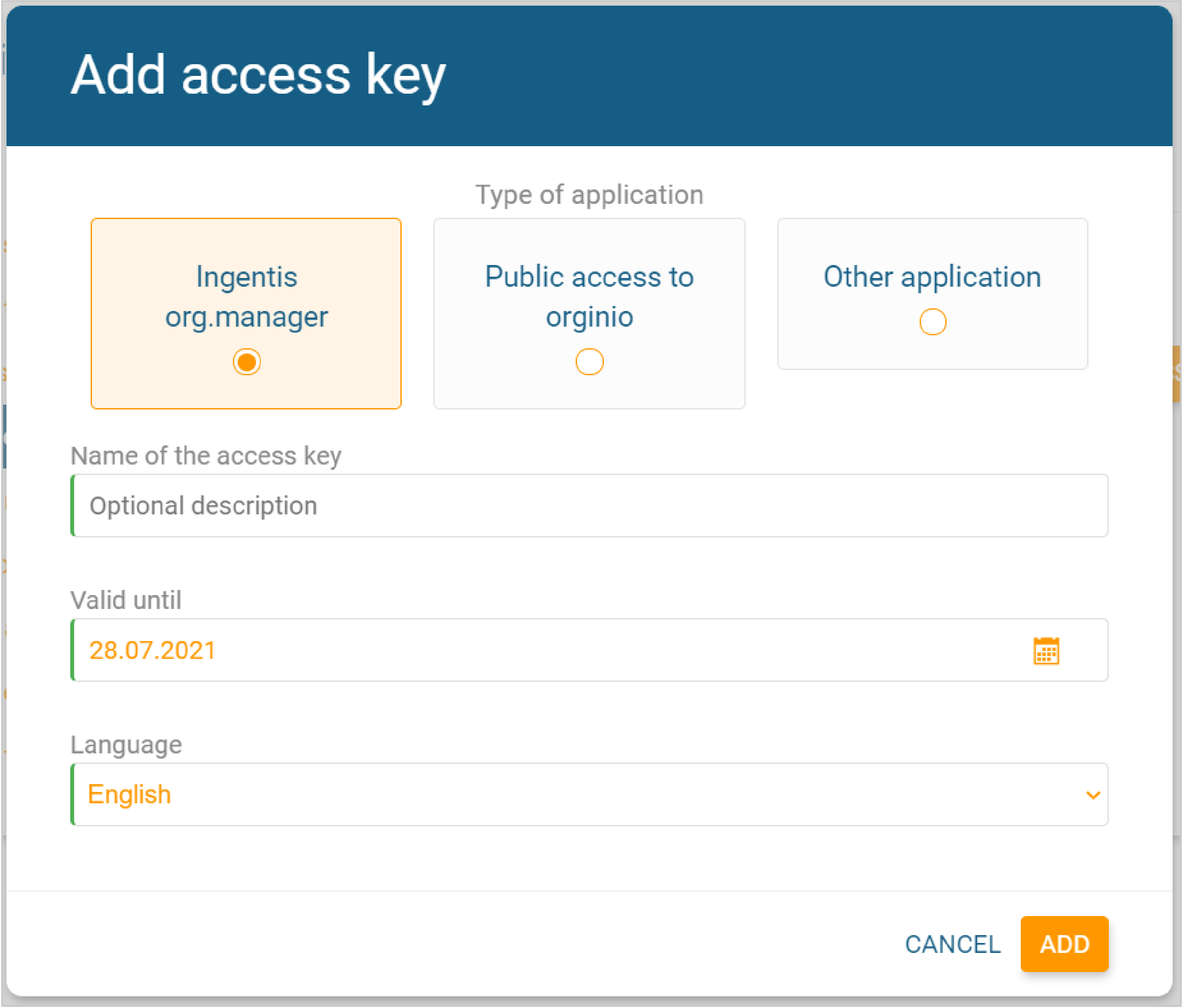


Fig. 119: Settings - Add application

The possible **types of application** are:

- **Ingentis org.manager**: The generated access key can be used as a data source in the org.converter.
- **Public access to orginio**: The access key created with this a URL, which enables the view mode to be retrieved without your own user account. This option is used, for example, for embedding orginio via iFrame on an intranet homepage.
- **Other application**: The generated access key enables other applications to access the data API of orginio. An example application is the automatic creation of Excel lists of the orginio data.

Name of the access key: The name of the access key is assigned here.

Valid until: The point in time until the access key is valid. If the date has expired, the view mode of orginio can no longer be accessed. Thus, together with an access key of type **Public access to orginio**, for example, a temporary view is made available in the Internet.

! After being generated, the access key is only displayed once for security reasons.

4.4 Access Control

The access control is available from Feature Set proceed PERFECT and higher (see Feature-Sets [▶ 164]) and and is controlled in the settings of the schema (see Schema [▶ 87]) and the links (see Relations [▶ 92]) as well as on the organization chart surface in the detail view (see Detail view [▶ 76]). The corresponding information with the associated link can be found here.

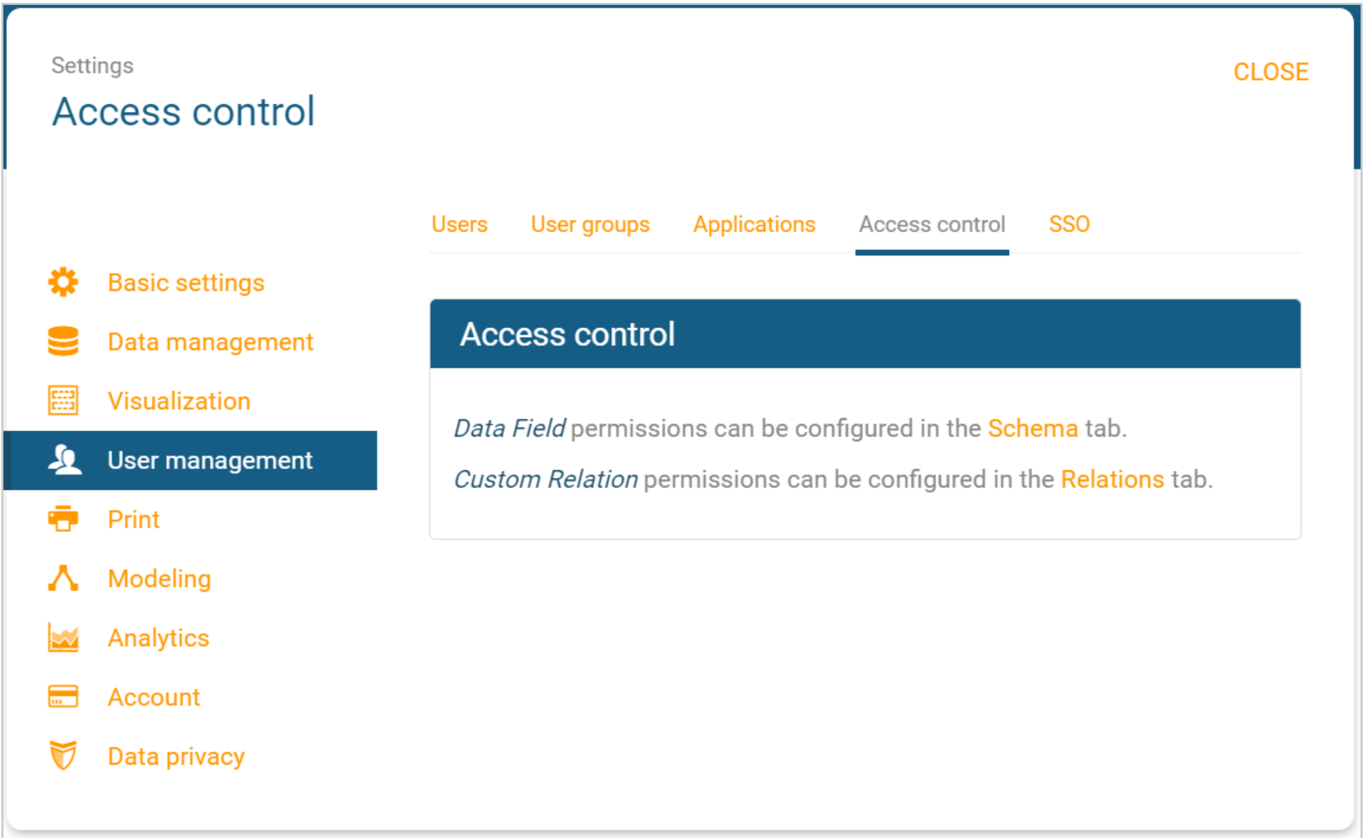


Fig. 120: Settings - Access Control

Changes to access protection only affect users after they have logged off and then logged on again!

4.5 SSO

To transfer the sign-on data of a user on his workstation computer to orginio, you can set a single sign on provider in this area. If all settings were made, the authentication of the user on his workstation computer will be sufficient to use orginio.

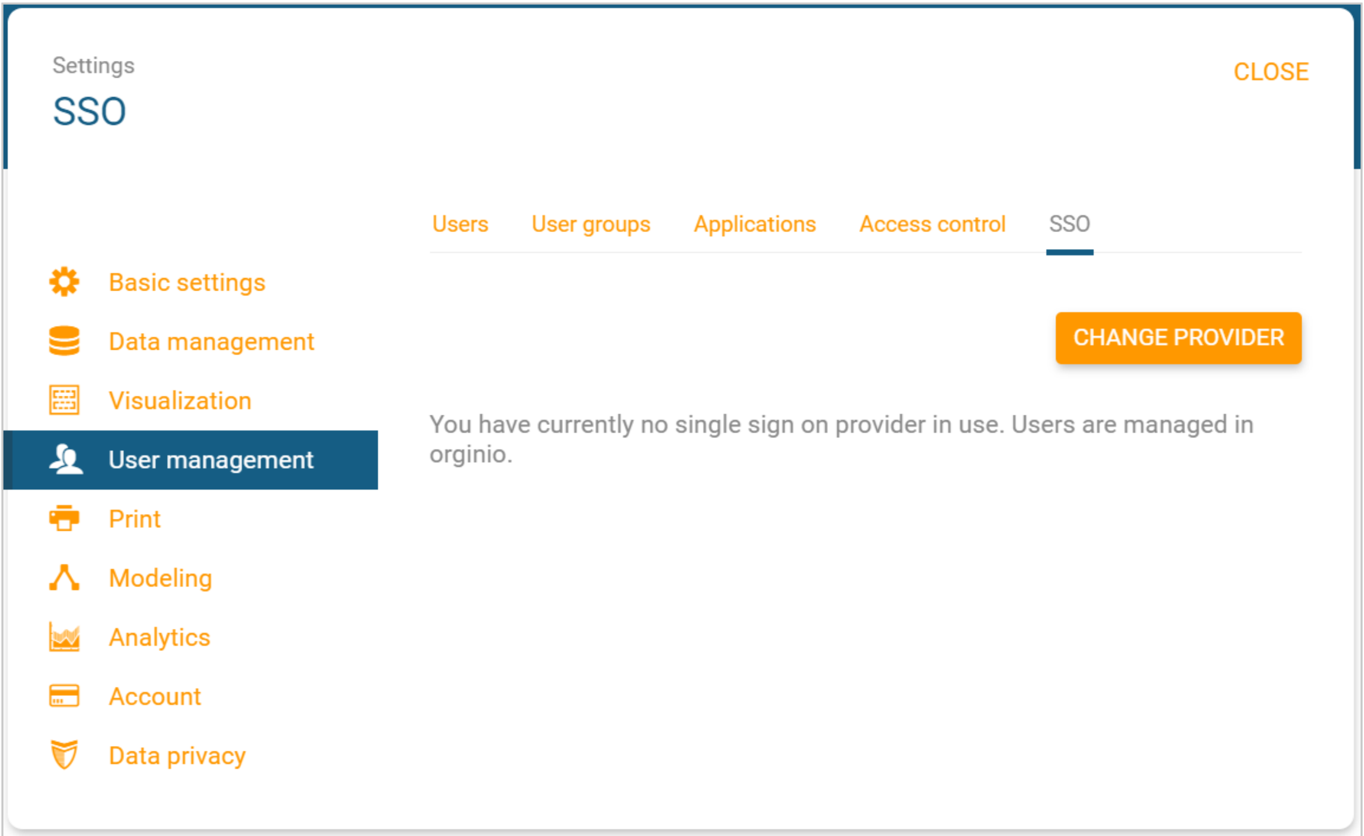


Fig. 121: Settings - Single Sign On

To store Single Sign On provider, click on **Change Provider**.

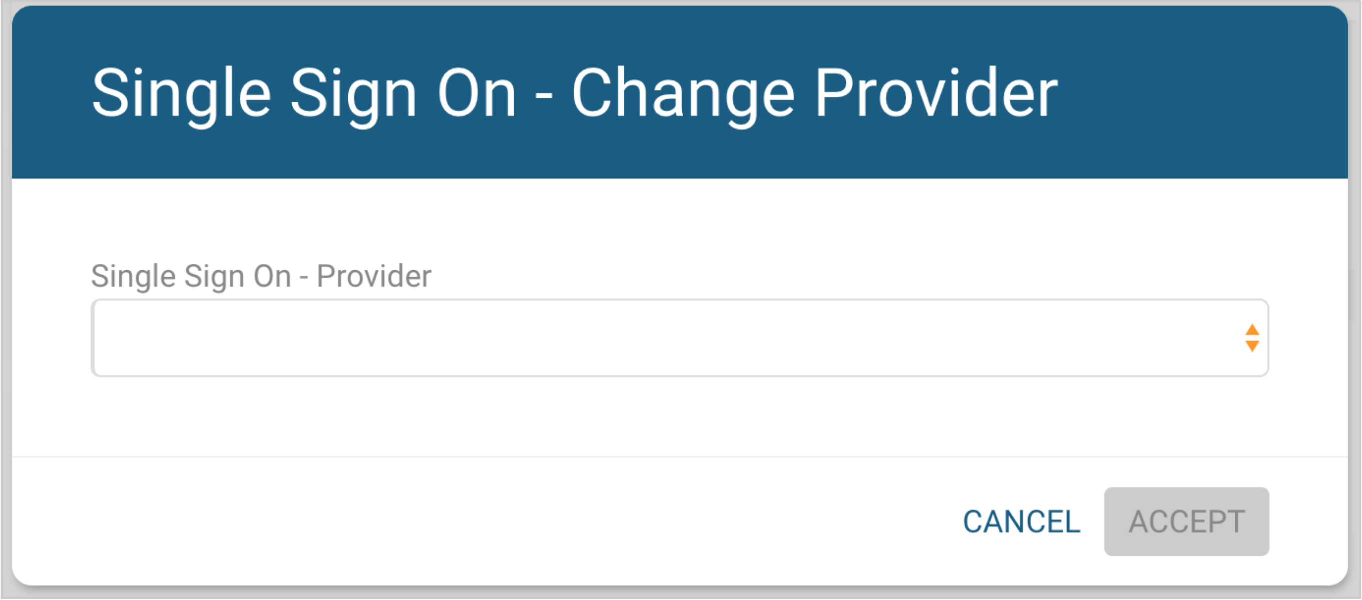


Fig. 122: Settings - Single Sign On - Change Provider

Under **Single Sign On** – **Provider** you can choose the corresponding provider from the providers available via a selection list. orginio supports the following Single Sign On Providers:

- **orginio**
- **Google**
- **Okta**
- **SAML 2.0**
- **BambooHR**
- **Azure AD (via OAuth 2.0)**

For setting up Azure AD via SAML 2.0, see Setting up Single Sign-On (SSO) for orginio with Azure AD [▸ 165].

5. Print

Settings for the header / footer and the display of the legend can be adjusted in the print area.

5.1 Header/Footer

The header and the footer can be specified for printing.

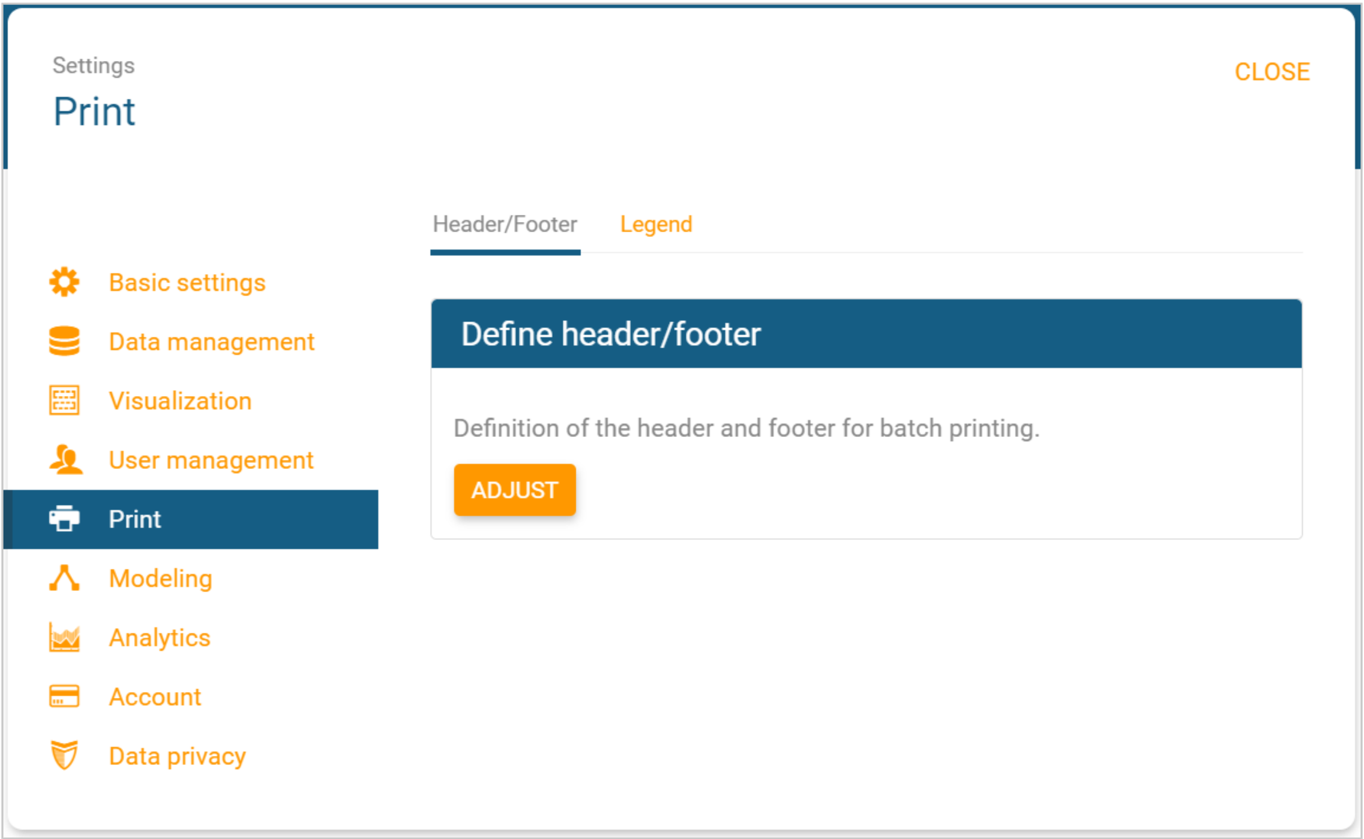


Fig. 123: Settings - Print

The content as well as the color and text size can be specified. Additionally the format of the date can be adjusted.

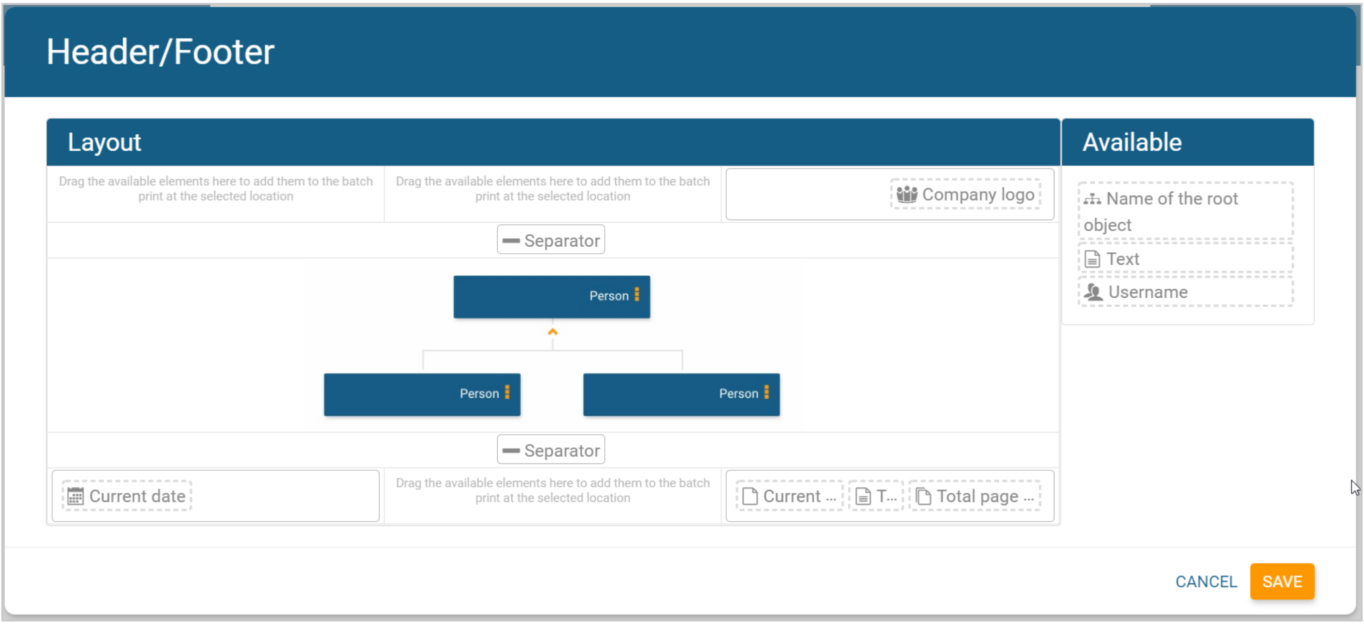


Fig. 124: Settings Header/Footer

5.2 Legend

The depiction of the legend in print can be adjusted here. **For PDF / image print**, position and layout can be set. For **batch print**, you can also set whether the legend is on a separate page, on all pages
or should not be displayed at all.

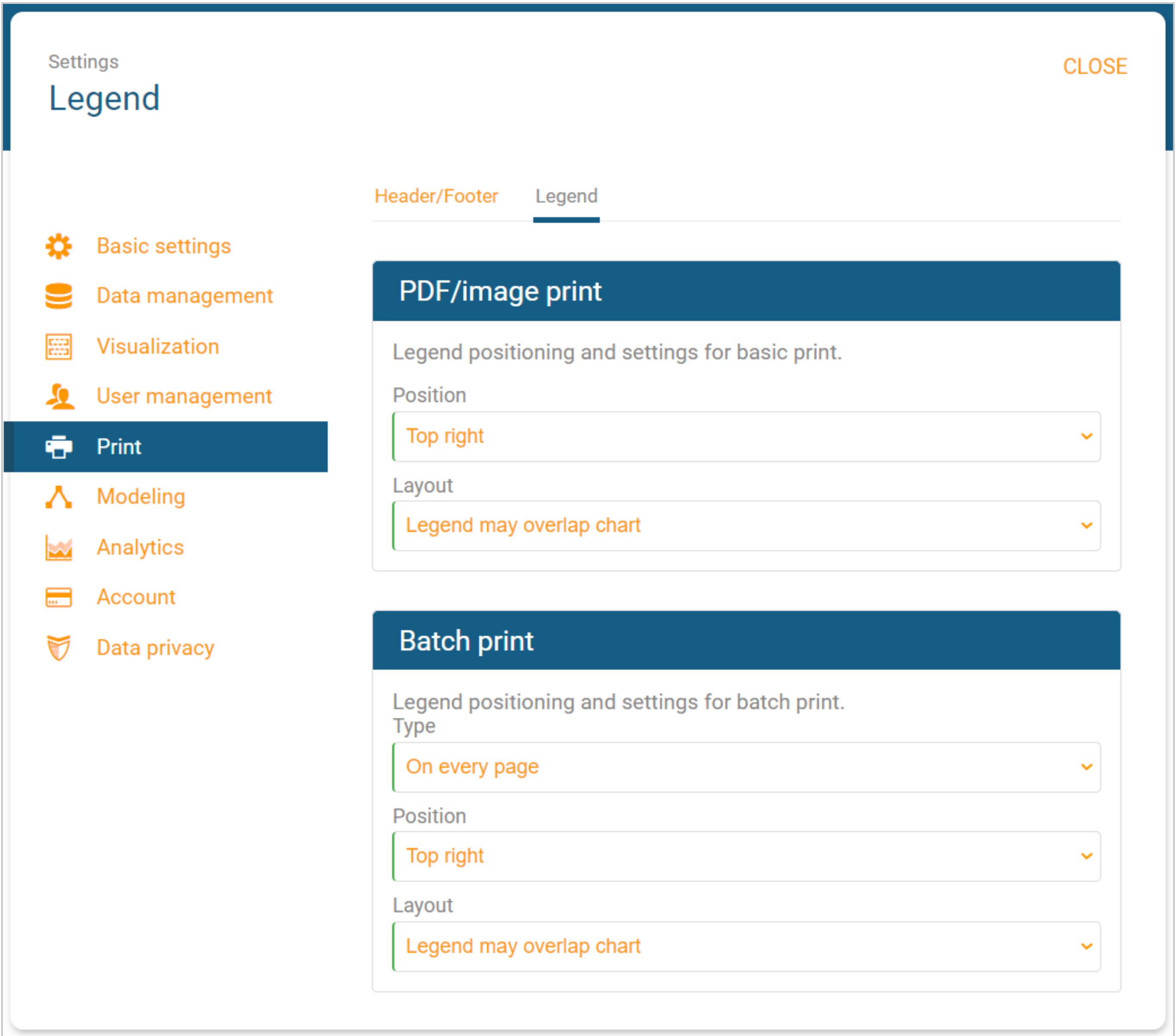


Fig. 125: Print - Legend

6. Modeling

Here, simulations can be created on the basis of an existing organizational chart. With the help of the simulations, structural changes are reproduced directly on a copy of your organizational chart, including existing key figures and visualization rules - the original organizational chart and the data in your HR system remain unaffected.

A simulation can be used, for example, to check which new positions need to be filled for a planned reallocation of tasks and whether new employees are required for this. It can also be used to analyze the additional costs associated with a new production department, for example, and the savings that can be achieved through restructuring.

The business simulations can be carried out simply and easily via drag & drop. The feature set complete Comfort is required for modeling.

See also

Feature-Sets [164]

6.1 Modeling chart

Here you can create new modeling charts.

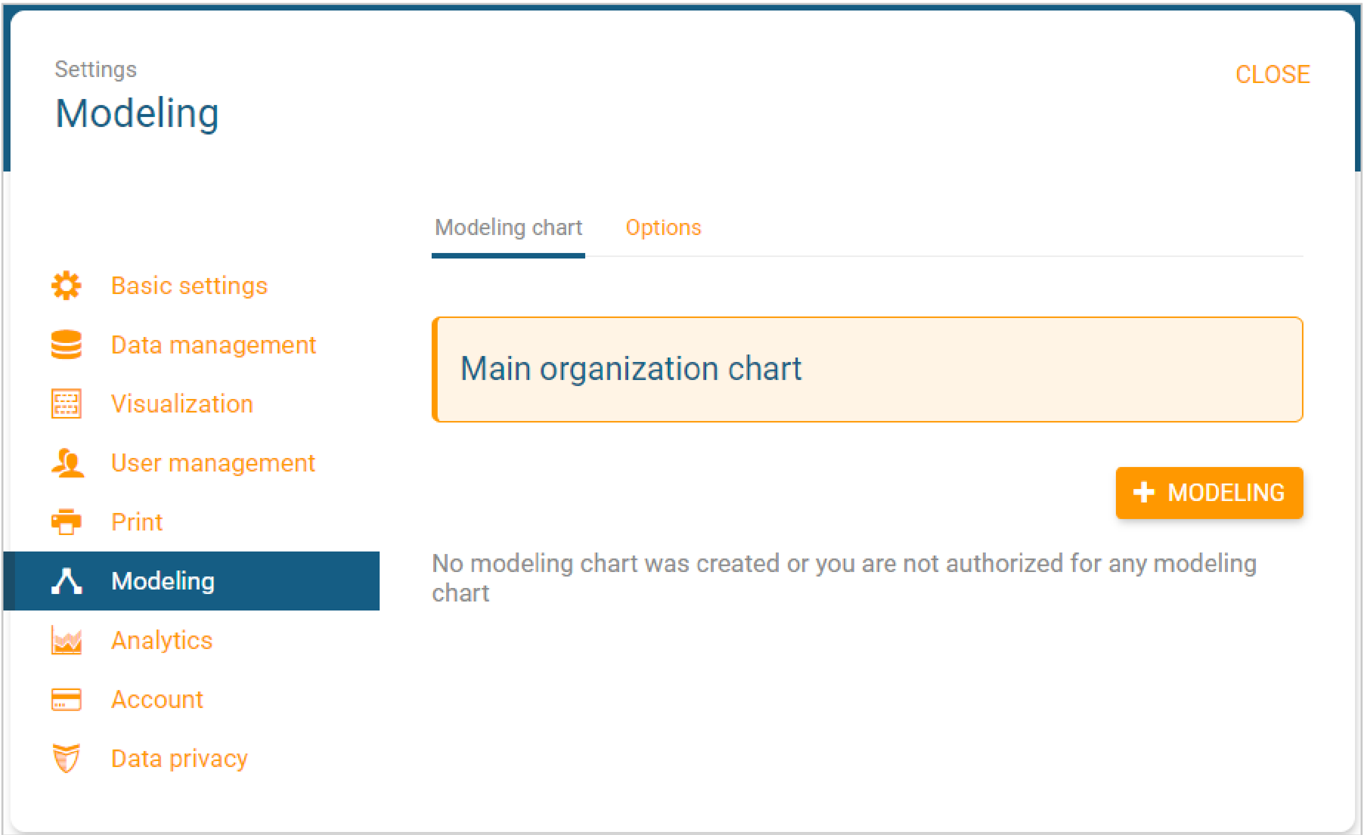


Fig. 126: Settings - Modeling

To create a modeling chart, first you must select a source organization chart and define a name.

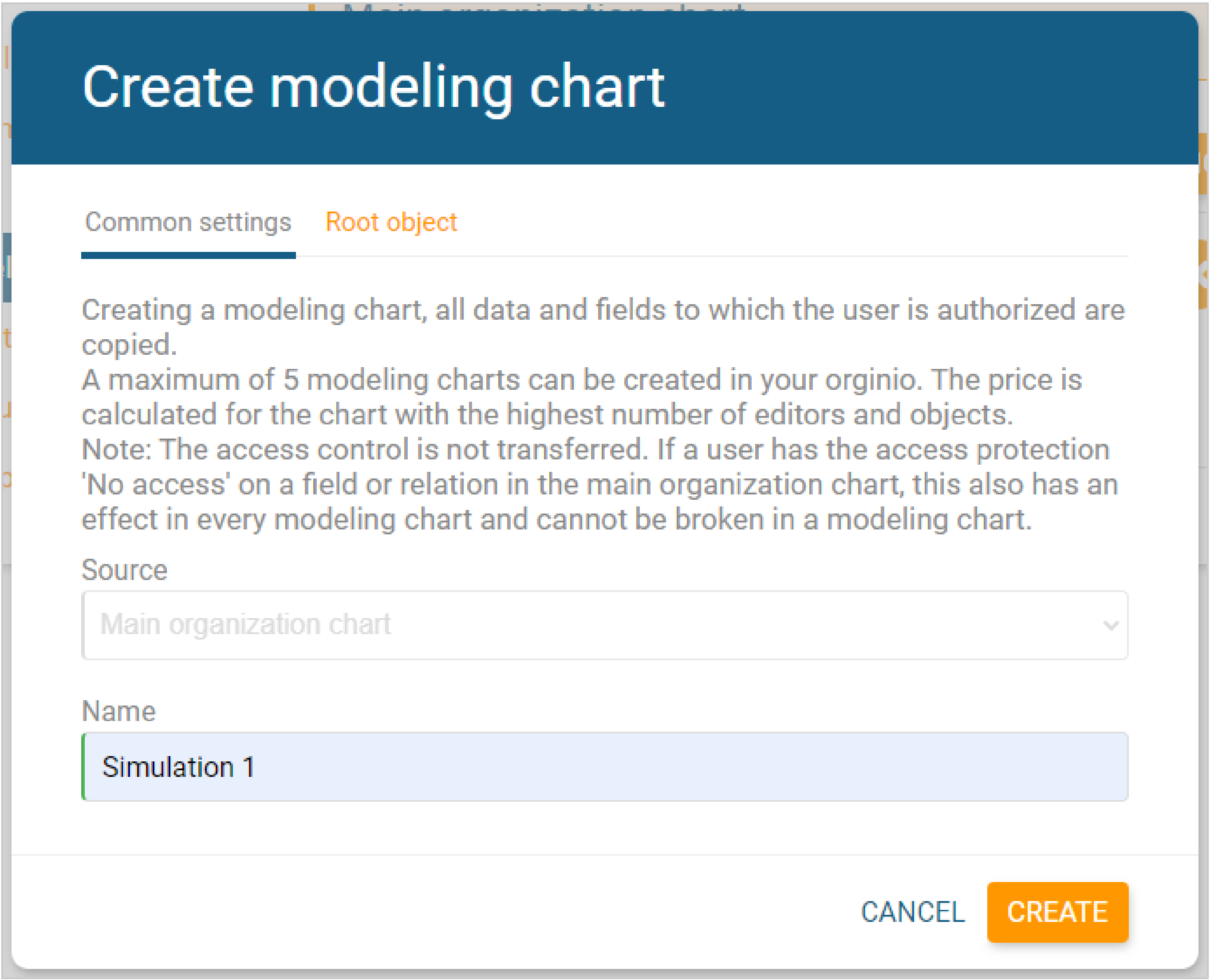


Fig. 127: Create Modeling - Common settings

In addition, if only part of the source organization chart is to be adopted for the modeling chart, you can select a root object from which on the modeling chart is generated.

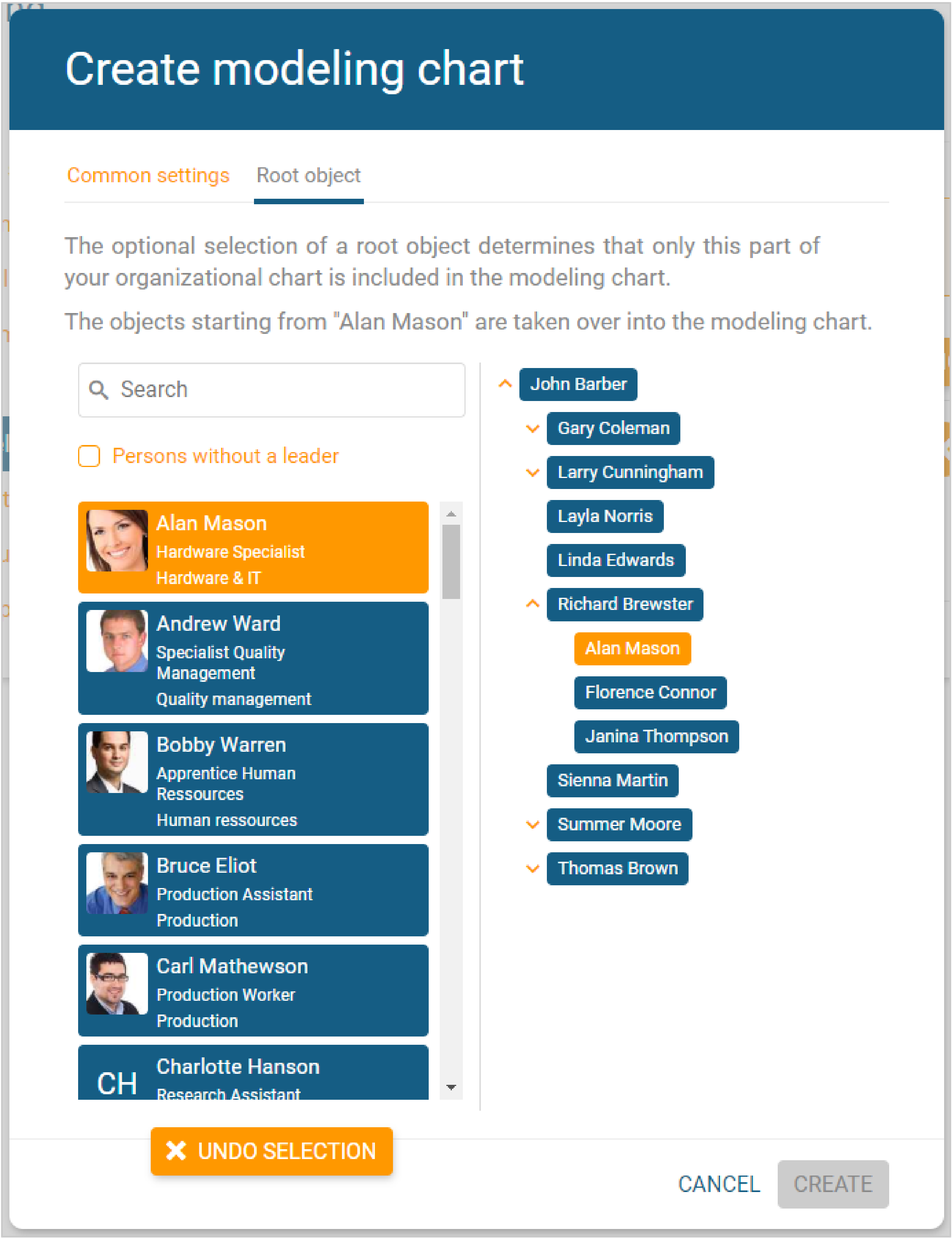


Fig. 128: Create modeling - Root object

Warning: If access control is set for data fields in the main organization chart, the protection will not be transferred to the modeling chart. The exception to this is the "No access" permission type, which will be transferred. This also applies if access control is set after the modeling chart has been created. However changes only become active after a new login of the affected users.

6.2 Options

Here you can forbid the creation of modeling charts.

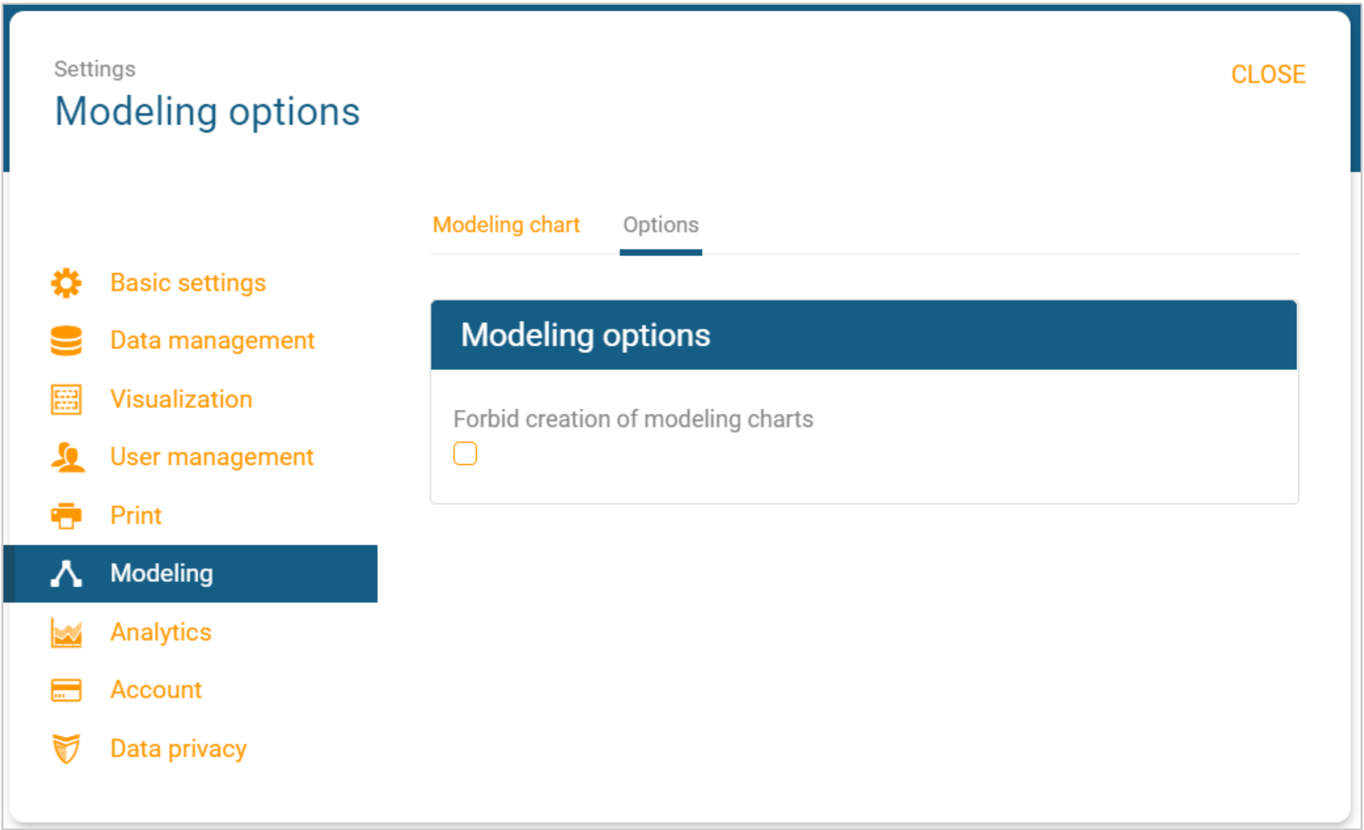


Fig. 129: Modeling - Options

7. Analytics

In the **Analytics** area you can update the analytical values in the organization chart. To do this, click on the **Calculate now** button. Analytical values are available to you in orginio Feature Set proceed PERFECT or higher (seeFeature-Sets [▶ 164]).

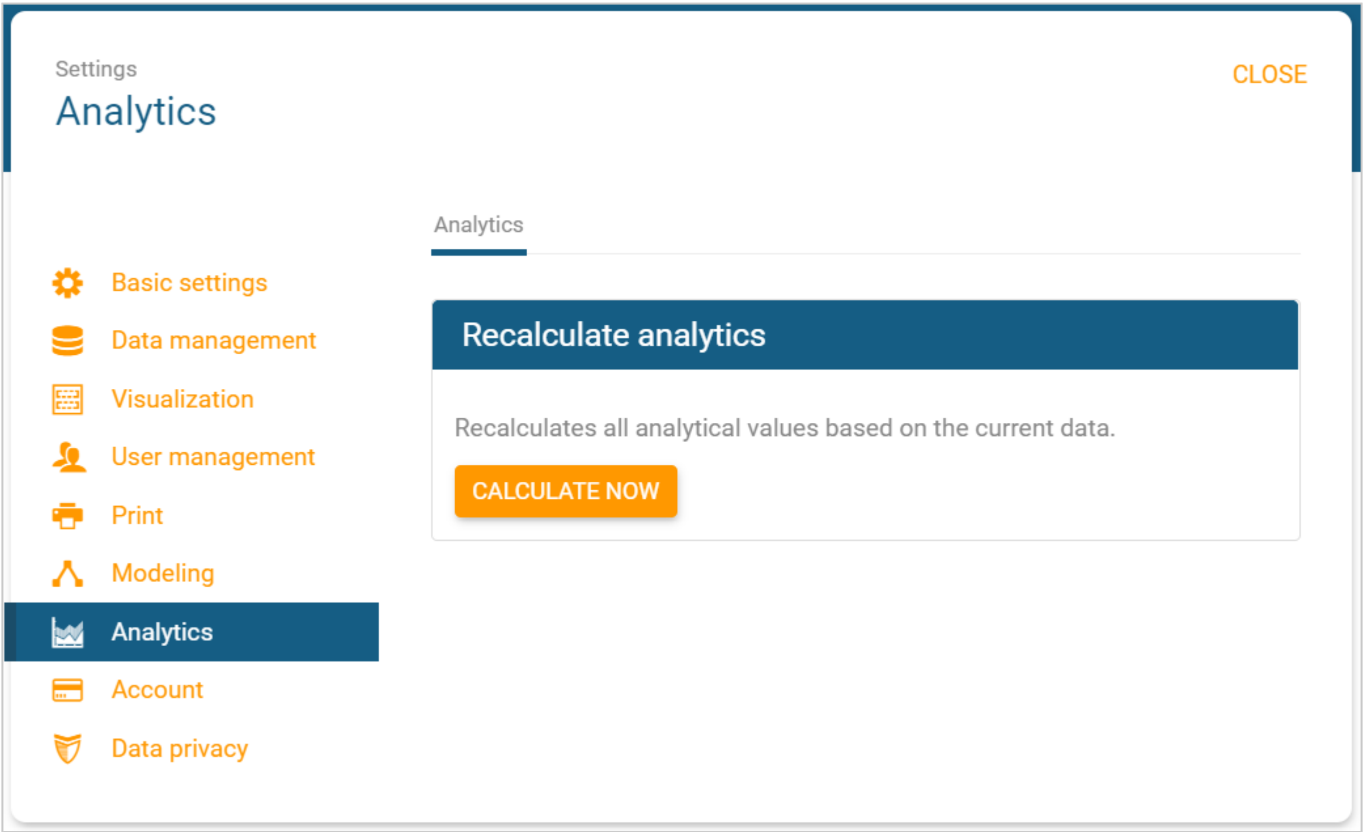


Fig. 130: Settings - Analytics

! The **Now calculate** function is only intended in the event that the automatic recalculation of analytical values by orginio should not work.

8. Account

8.1 Account

In this area you can manage the payment methods or delete the entire orginio account.

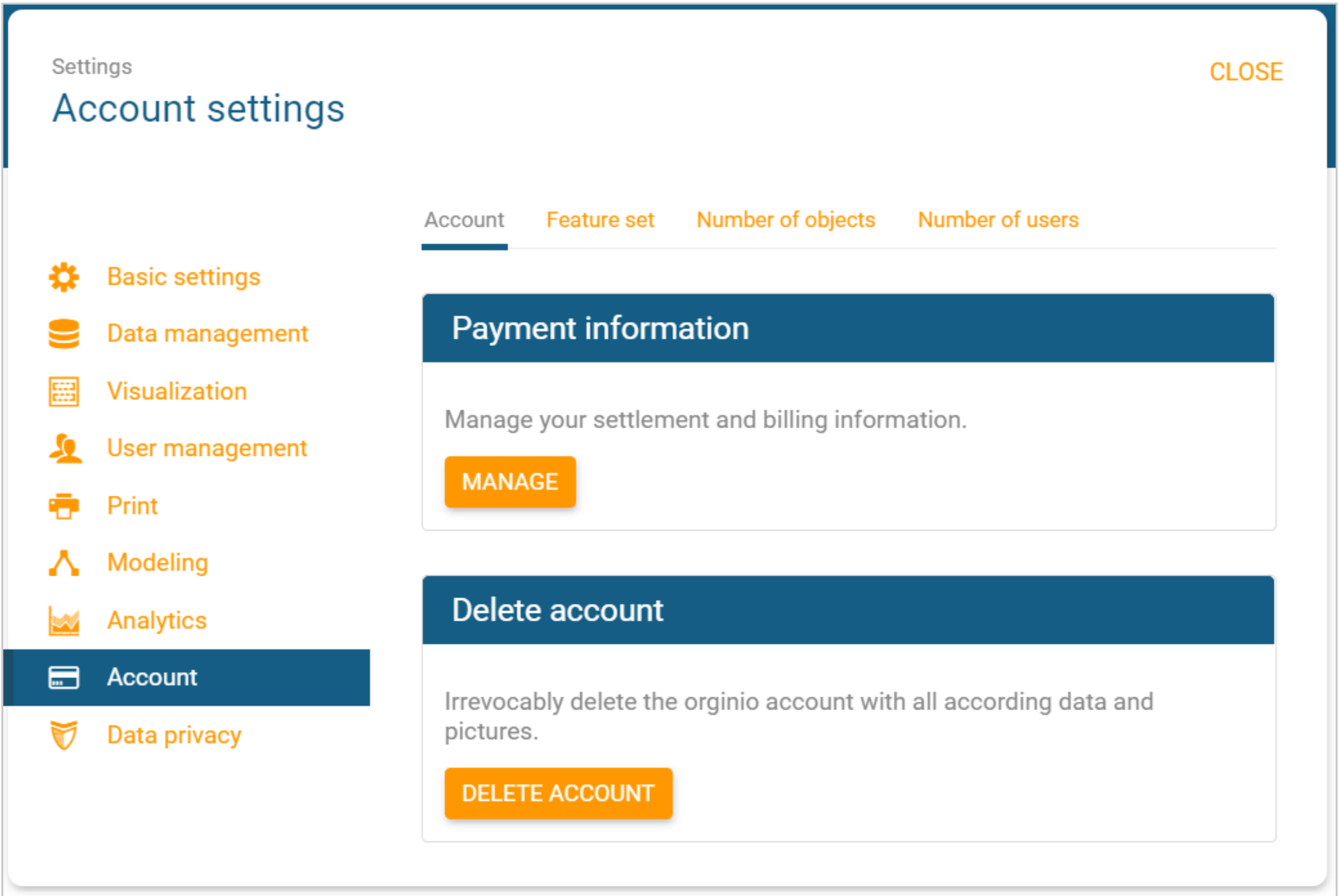


Fig. 131: Settings - Account

To change the payment information, click on **Manage**. The entire orginio account can be deleted permanently by clicking on the **Delete account** button and then by confirming with **Delete account**.

8.2 Feature Set

In this area you can see which **Feature Set** is active for this orginio account. Furthermore, all possible **Feature Sets** that can be selected are listed here. The current feature set can be selected by a user with the **Manage company account** permission.

> **!** An overview of all orginio features and feature sets is available to you in chapter Feature-Sets [▸ 164] and on the orginio website.

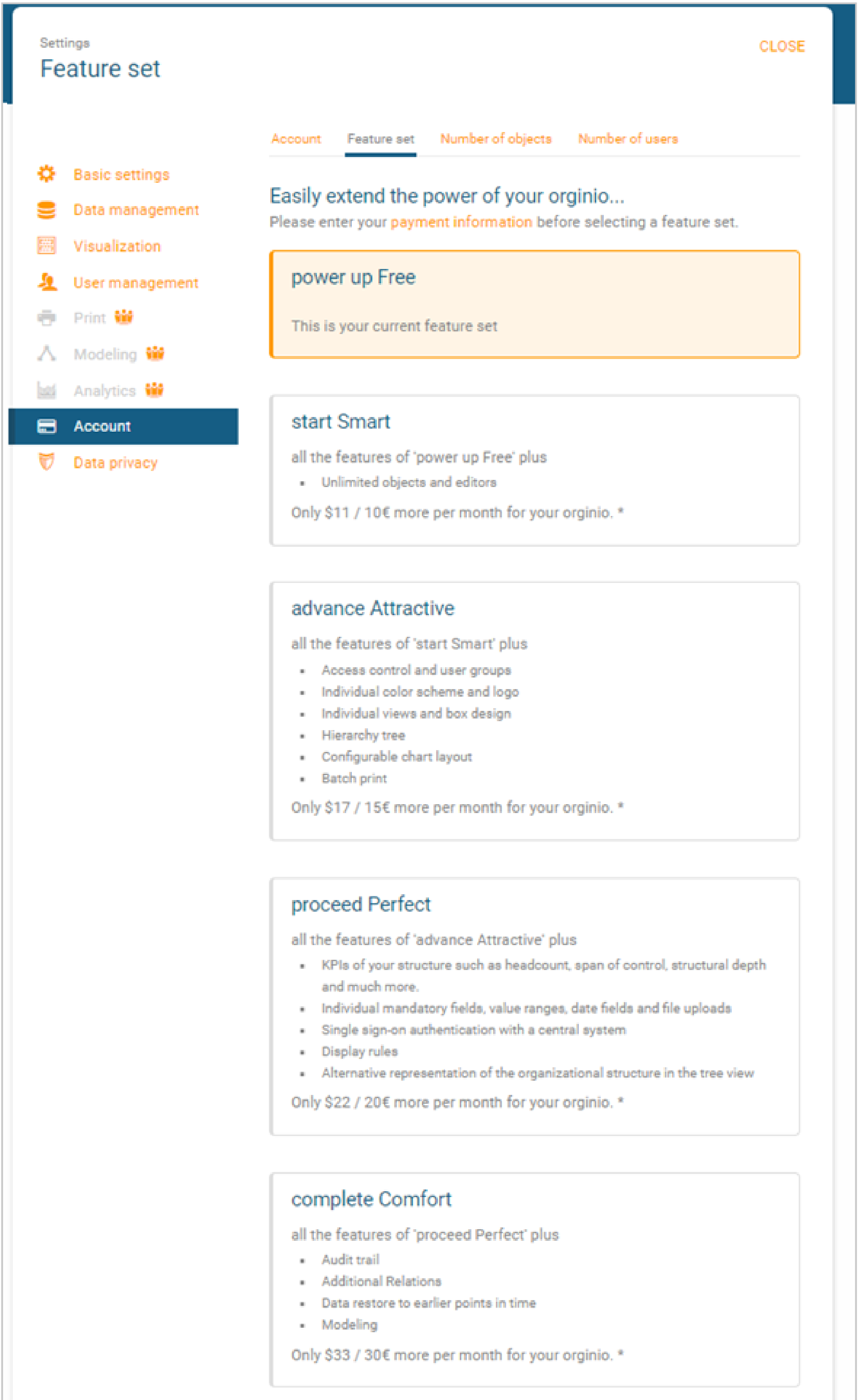


Fig. 132: Settings - Feature-Set

8.3 Number of objects

In the **Number of objects** area you can find a chronological listing of the number of objects stored in orginio. Each object type is viewed individually and has a unique color, which can be seen in the legend. You can restrict the reference period by selecting from **Start point** and **End point**.

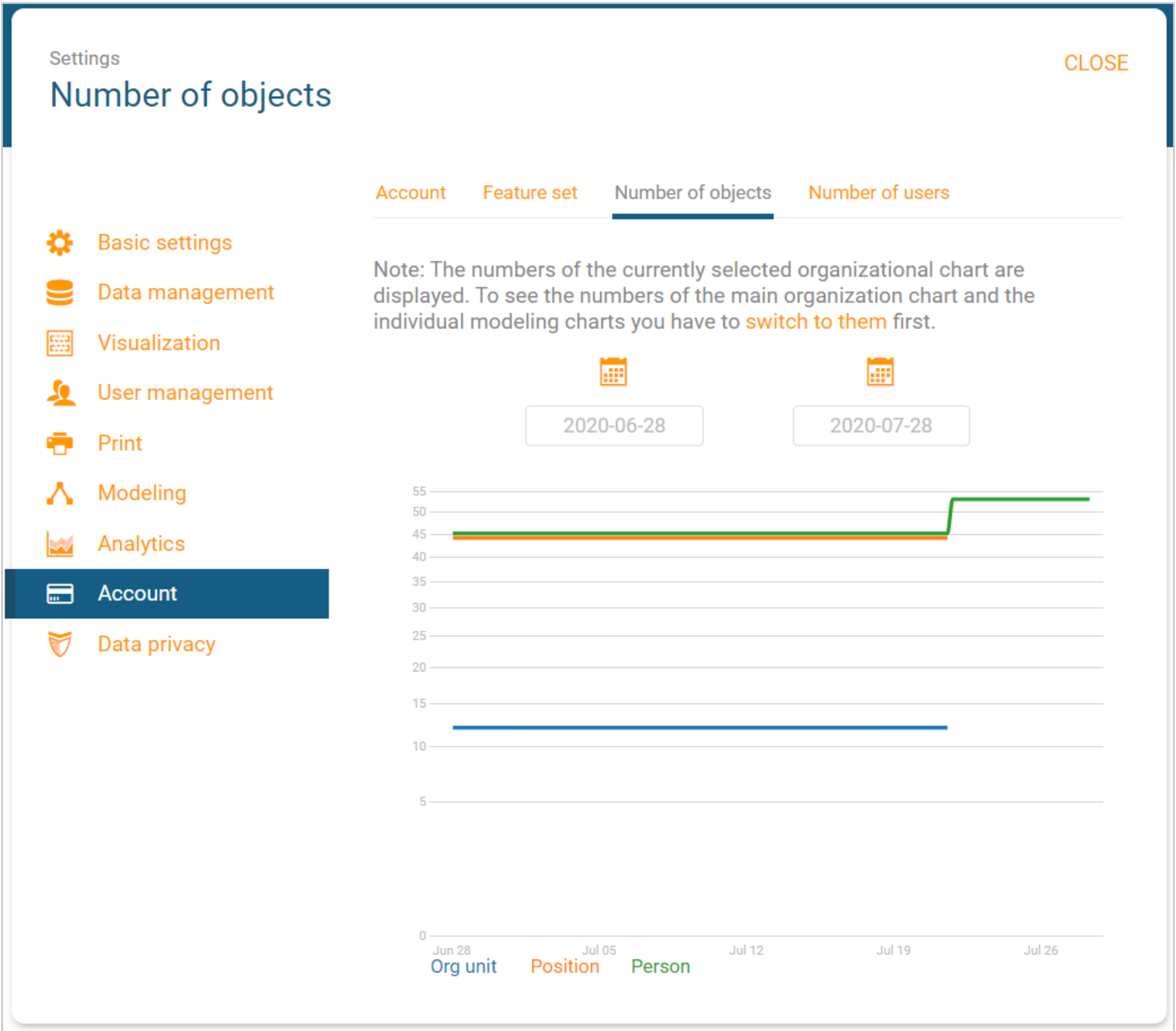


Fig. 133: Settings - Number of objects

8.4 Number of Users

In the **Number of users** area you can find a chronological listing of the number of registered users for this orginio account. The different permissions and the number of users themselves are listed. The assignment can be seen in the legend. You can restrict the reference period by selecting from **Start point** and **End point**.

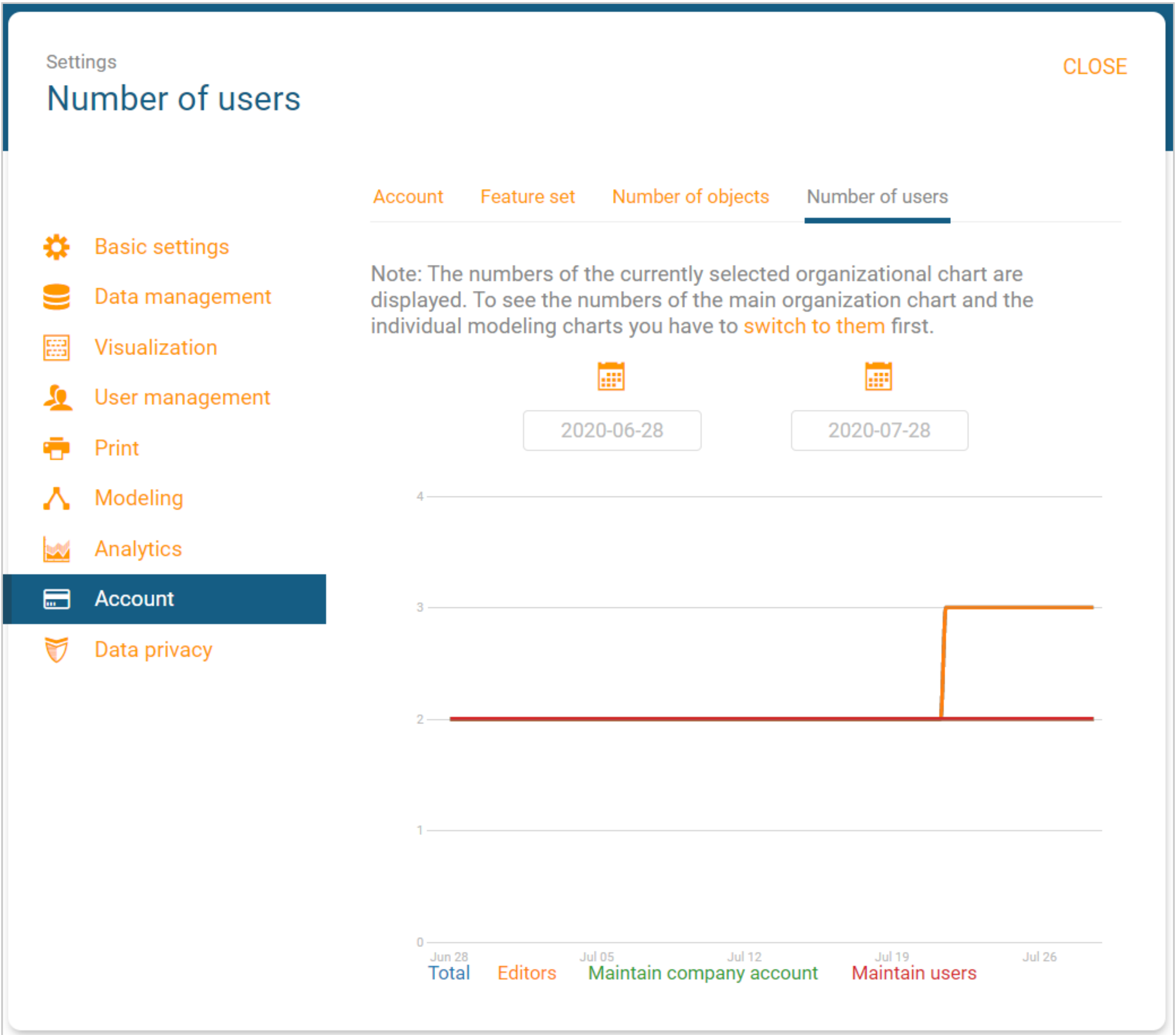


Fig. 134: Settings - Number of Users

9. Data protection

In the data protection area you can remove or download **personal data** of individual persons from the entire history of the data. You can download the modification log of any desired time period using the **audit log**.

9.1 Personal data

In this tab you can delete personal data or export it as a CSV file.

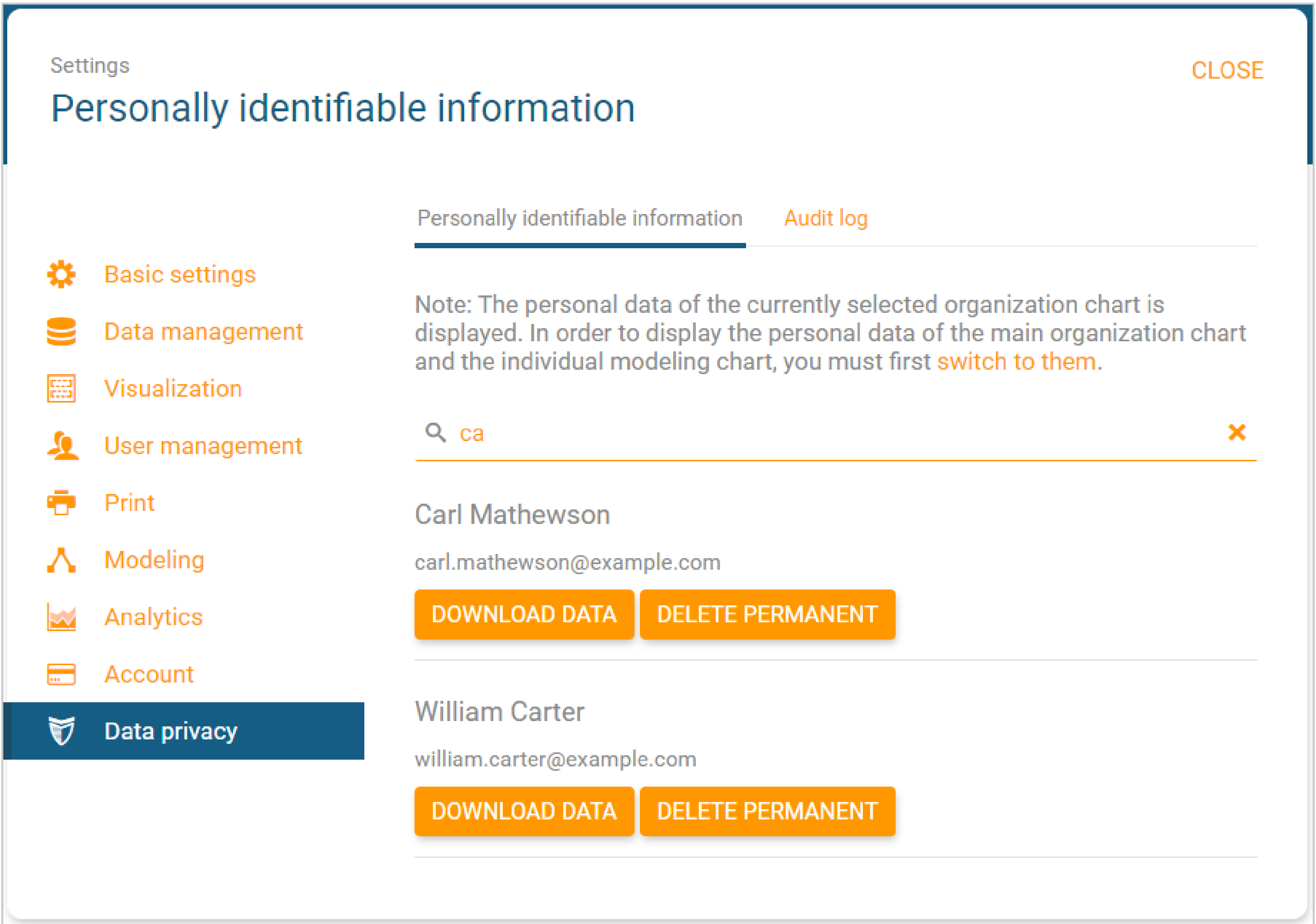


Fig. 135: Settings - Personal Data

All available persons are searched and listed via the search bar.

- **Download data**: Downloads the existing information of a person in a CSV file.
- **Delete permanently**: The display name of the person is changed to "deleted" and all other data fields including the profile picture of the selected person are deleted.

! The personal data of this person is also removed from the entire history of the data. Thus, even in the case of a **data recovery** (see Data [▸ 84]), the persons with the display name "deleted" and empty data fields are recovered.

9.2 Audit log

In this tab from the Feature Set complete COMFORT or higher (see Feature-Sets [▶ 164]) you can download all audit logs.

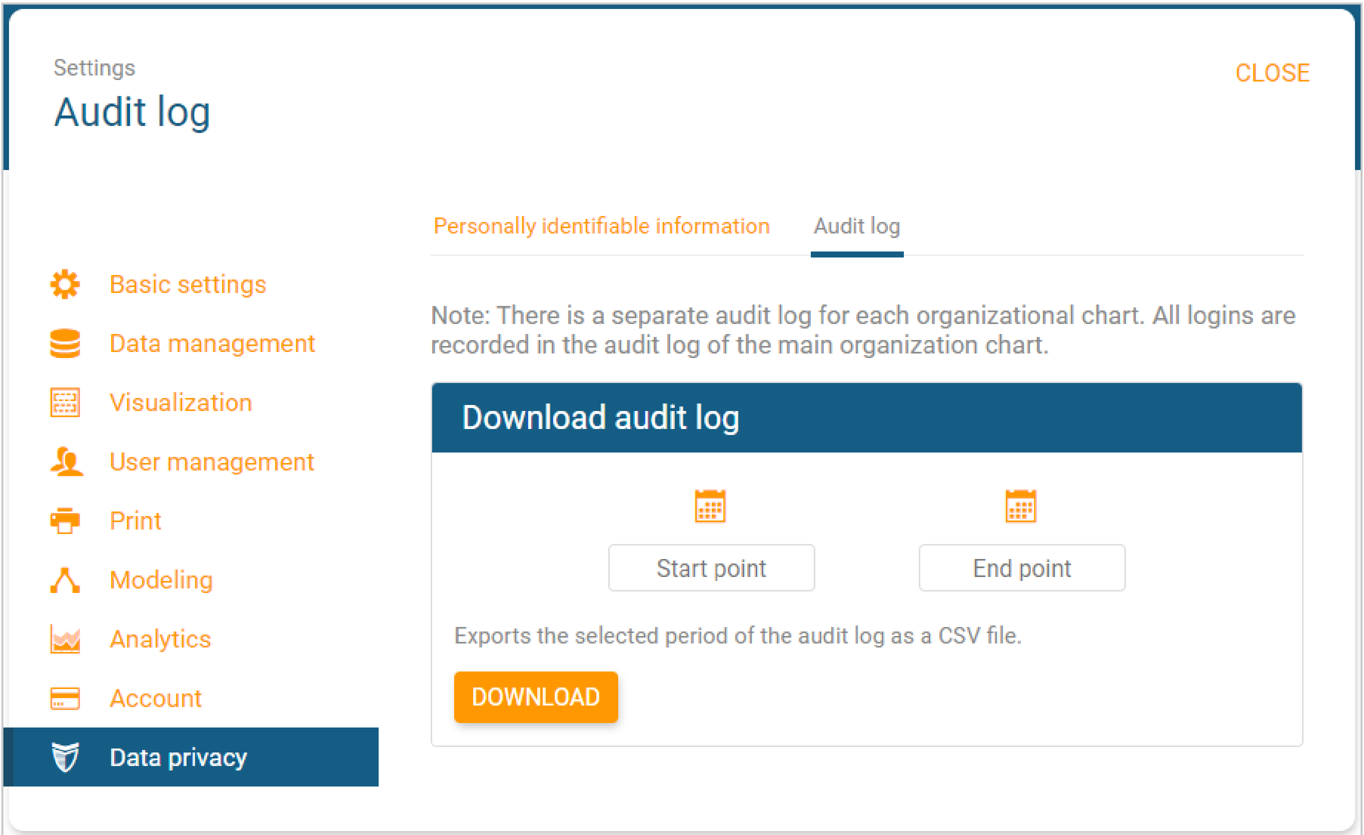


Fig. 136: Settings - Audit trail

The trail can can be restricted by specifying a **start** and **end time**. If you have not entered any points in time, the entire available log will be downloaded. By **download** the modification log is downloaded as a CSV file.

The modification log lists the following processes:

Data processing

- Import
- Export
- Edit
- Create
- Delete
- Access protection

Login

- Successful login
- Failed login
- Log-out

User Management

- User account creation
- User account deletion
- User account edit

The information is listed together with date and time and additionally assigned to the respective executing user.

D View Mode

The view mode shows the settings that were made by users with the **Edit data** permission. Information cannot be edited in view mode. You can access the view mode anytime and anywhere.

I Structure of the Interface

The view mode consists of the **organization chart** itself, the **multifunctional bar**, the **position display** and the **settings bar**.

1. Organization chart

The organization chart displays your corporate structure.To open and close substructures again, click on the arrow button below the corresponding object. Once you have selected an object in the organization chart, an information area for this object will be displayed. With the ESC key or a click in a free space, boxes can be deselected again.

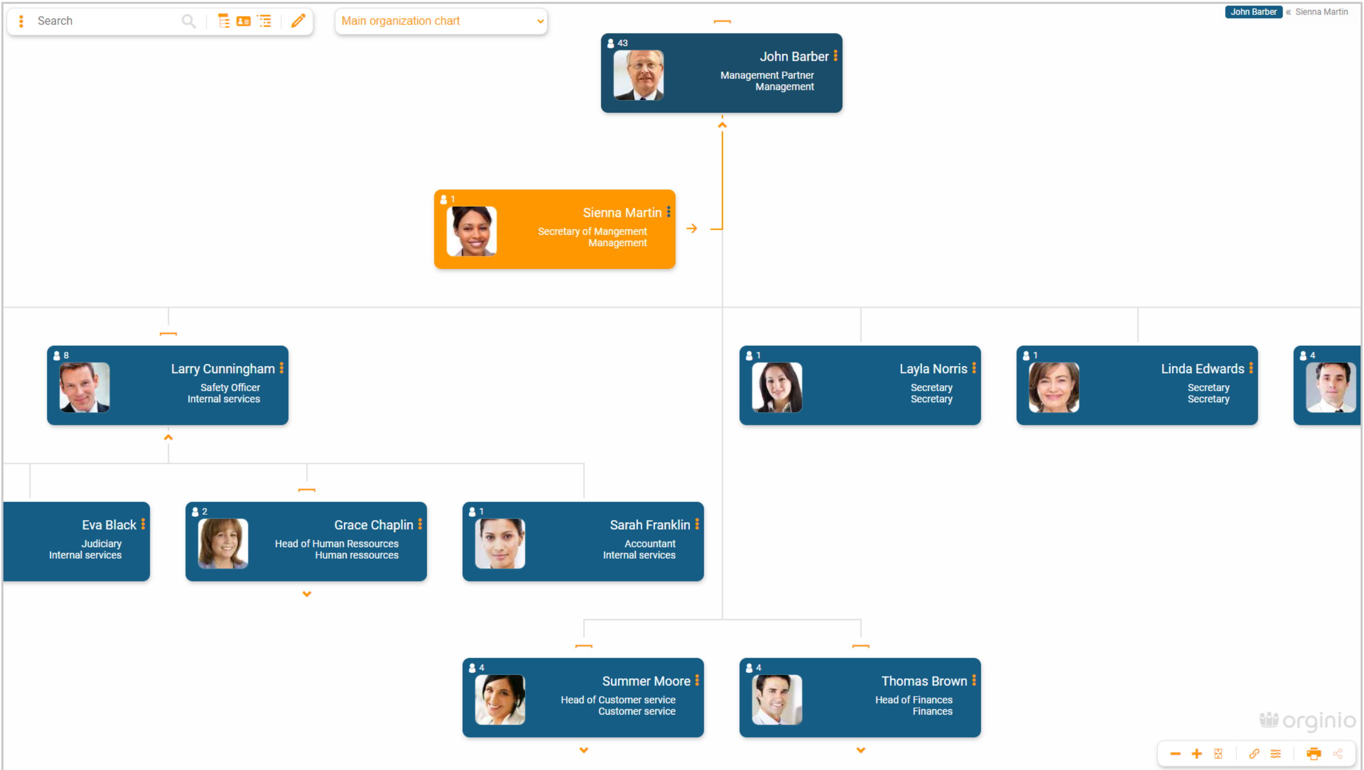


Fig. 137: View Mode - Interface

If there are modeling charts, you can switch between the main organization chart and the modeling charts.

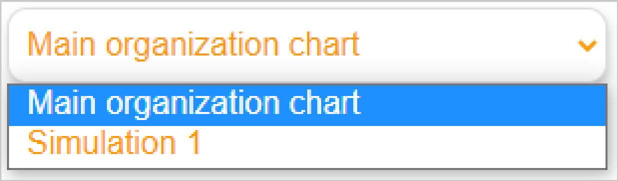


Fig. 138: View Mode - Organization chart select

Level navigation

A parenthesis symbol is displayed via each box if subordinate boxes are available.

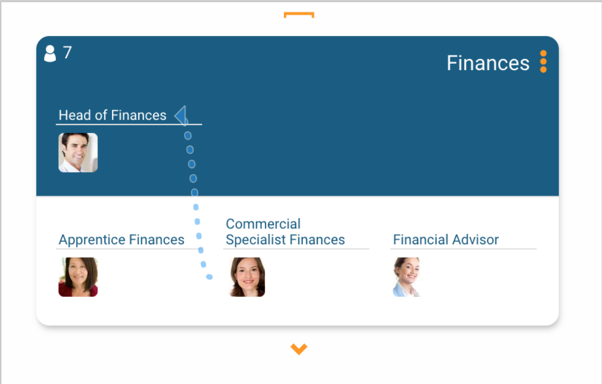


Fig. 139: Level navigation - Parenthesis symbol

The object at the highest level is displayed by clicking on the parenthesis symbol. The structure above it is replaced by a small hierarchy box. This new feature enables the printing of selected areas. You can hide the minimized hierarchy box using the **display options** of the **settings bar** (see Settings Bar [151]).

2. Box

Depending on the selected data structure (see Data [▸ 84]), boxes of the hierarchically highest data type are created automatically. If, for example, you have imported data containing the departments, positions and persons, the boxes for the departments are created. If, however, you have read in data containing positions and persons, the boxes for the positions are created. In the case of data merely containing persons, a box is created for each person.

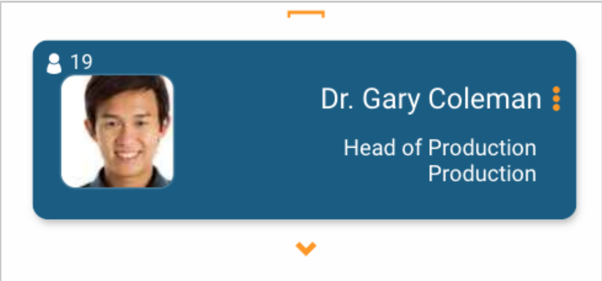


Fig. 140: View Mode - Organization Box

The boxes contain information relating to the name of the hierarchy object and the objects assigned to it. In position and department hierarchies the box is divided into two areas. In the upper area are managerial objects and in the lower area are the normally assigned objects. This is not the case with person structures because a separate box is created for each person. You can still display analytical values at the top left in the box. This is first included from the Feature Set proceed PERFECT or higher (see Feature-Sets [▸ 164]). The analytical value **Headcount** is selected here by default. By clicking on the analytical value a selection list appears with different KPIs. If you have selected another analytical value, this appears in the box.

The **...** button takes you directly to the detail view of the corresponding object.

3. Multifunctional Bar

By clicking on the icons in the multifunctional bar the **menu**, the **hierarchy tree** (from Feature Set proceed PERFECT and higher (see Feature-Sets [▶ 164]), the **legend** for the display rules and the **detail view** can be displayed.

The areas are arranged below the multifunctional bar. Firstly, they can be deactivated again by clicking on the corresponding symbol in the multifunctional bar. Secondly, they can be also be hidden using an x symbol, which appears when moving the mouse over the icon at the top right in the respective area.

If a user has editing permissions, the edit symbol is next to the icons for the information areas for changing directly to the edit mode.

Fig. 141: View Mode - Multifunctional List

3.1 Menu

You can access the menu using the ...button. From here you can go directly to the **Settings** (see Settings [▸ 157]). If you have any questions, you can retrieve further information via the **Help** . If you have the **Edit data** permission, the **Edit mode** can be activated via the menu (see Edit mode [▸ 6]). **Log out** logs out the user currently logged in.

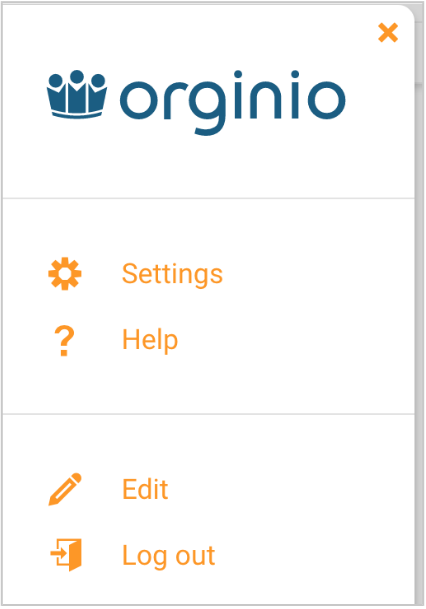


Fig. 142: View Mode - Menu

3.2 Hierarchy tree

The hierarchy tree is available with the feature set proceed PERFECT (or higher). It shows the structure of the organization chart in hierarchical levels. Only objects of the highest hierarchical object type are displayed. If objects of this object type have no hierarchical connection, they are displayed on the top level. Key figures are also displayed for each object, depending on which key figure type was selected. By default, this is the head count from the department.

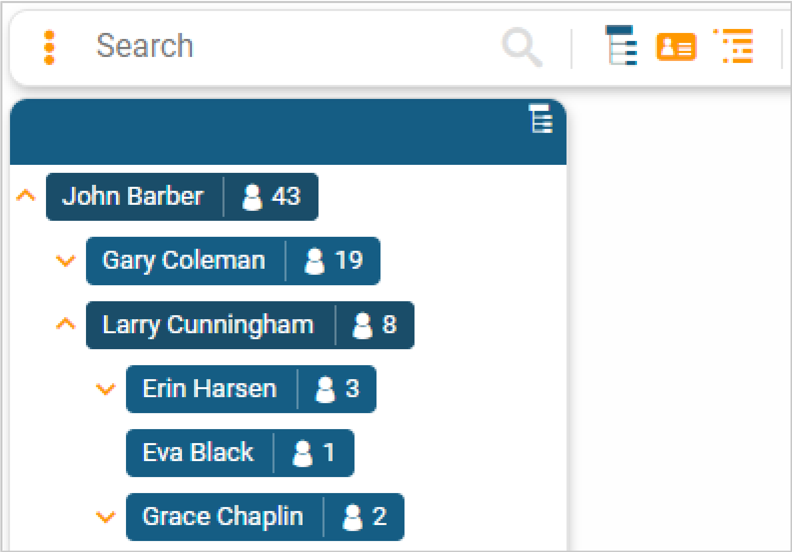


Fig. 143: View Mode - Hierarchy tree

The hierarchy tree can be deactivated again by clicking on the corresponding symbol in the multifunctional list. On the other hand, it can be hidden using an x symbol, which appears when you move the mouse over the hierarchy tree.

See also

Feature-Sets [▸ 164]

3.3 Object details

The object details are displayed for the object currently selected. All existing data fields of this object are listed.

Excluded from this are data fields that are not enabled for the current user via the access control (see Schema [▸ 87]). Likewise, fields are not displayed here if in the schema (see Schema [▸ 87]) under **display in the detail view** the option **Only if information available** was selected and the corresponding field is empty, or **Always in view mode** was selected.

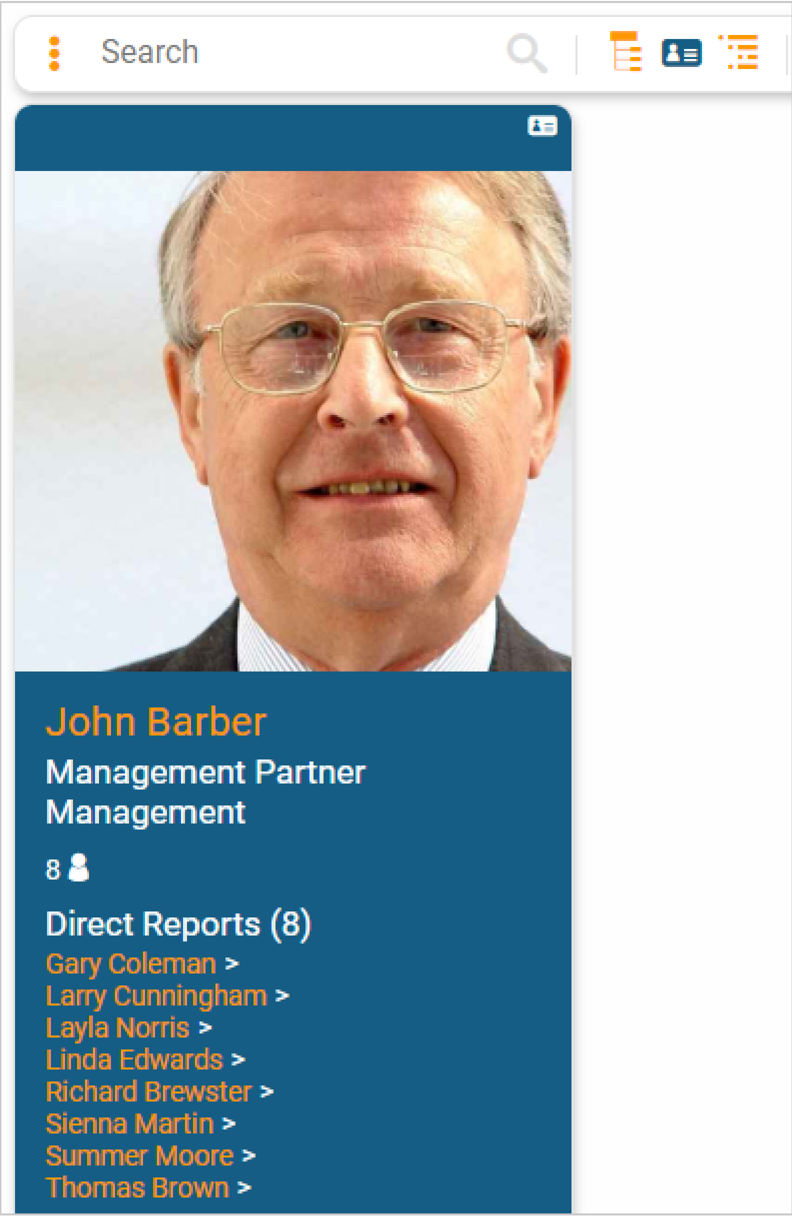


Fig. 144: View Mode - Object Details

Linked objects and the individual object name are represented in the accent color (see Your own color scheme [▸ 112]). Clicking on these objects takes you directly to the detail view (see Detail view [▸ 155]).

The object details can be deactivated again by clicking on the corresponding symbol in the multifunctional bar. Secondly, it can be hidden using an x symbol, which appears when moving the mouse over the icon in the object list at the top right.

3.4

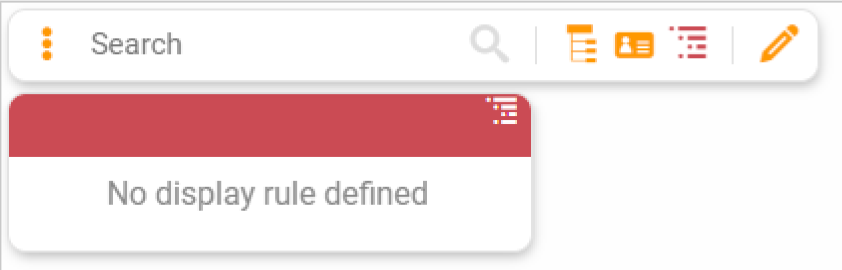


Fig. 145: Viewing Mode - Legend

Using the legend, previously entered display rules can be switched on or off individually (or completely) in real time. The display rules are configured in the edit mode under display rules [▸ 109].

4. Search

By entering a search term in the search bar, all objects are searched for by data fields matching the searched free text. The hits are displayed as a selection list, grouped according to object types and sorted alphabetically.

By clicking on the button Download search results, you can create and download a xlsx file which contains the search results.

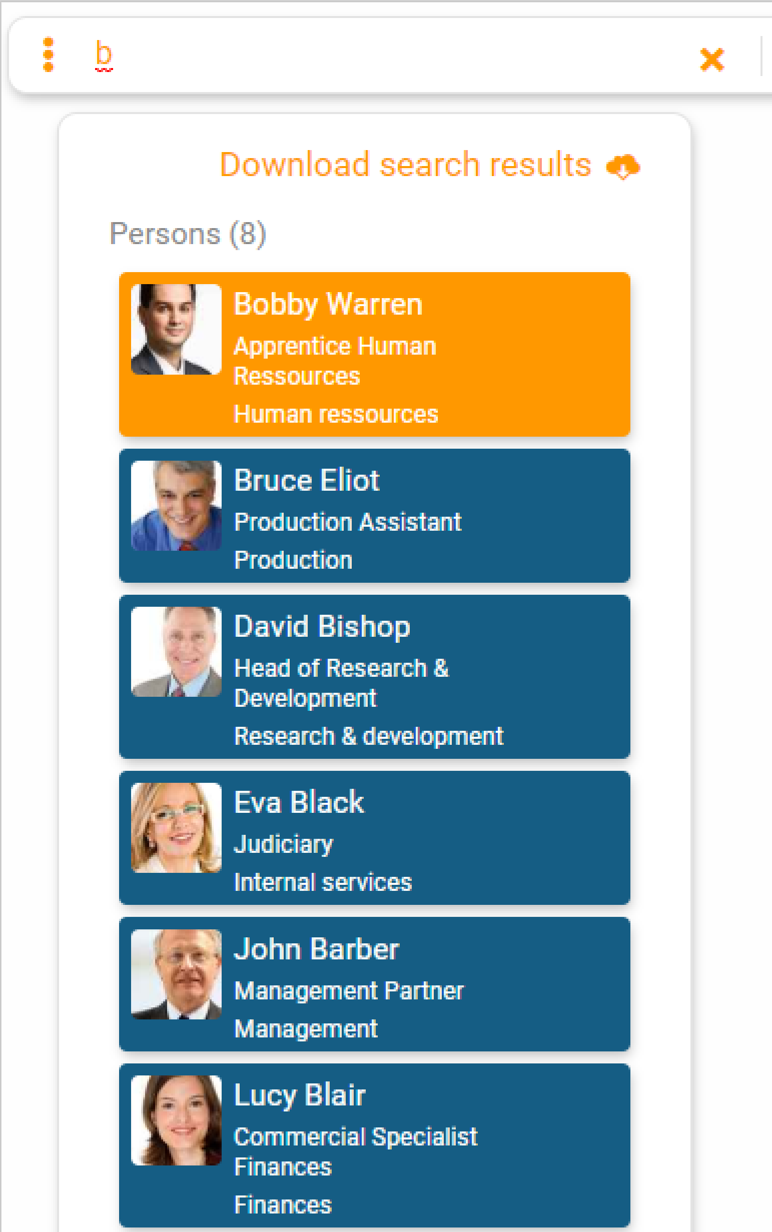


Fig. 146: View Mode - Search and Hit List

5. Position Display

The position display contains the entire path from the root of the organization chart up to the selected object. Hence, you can always see exactly where you are located in the structure.

Fig. 147: Organization Chart - Position Display

6. Information Area

The information area lists the stored information and linked objects for an object selected in the organization chart.

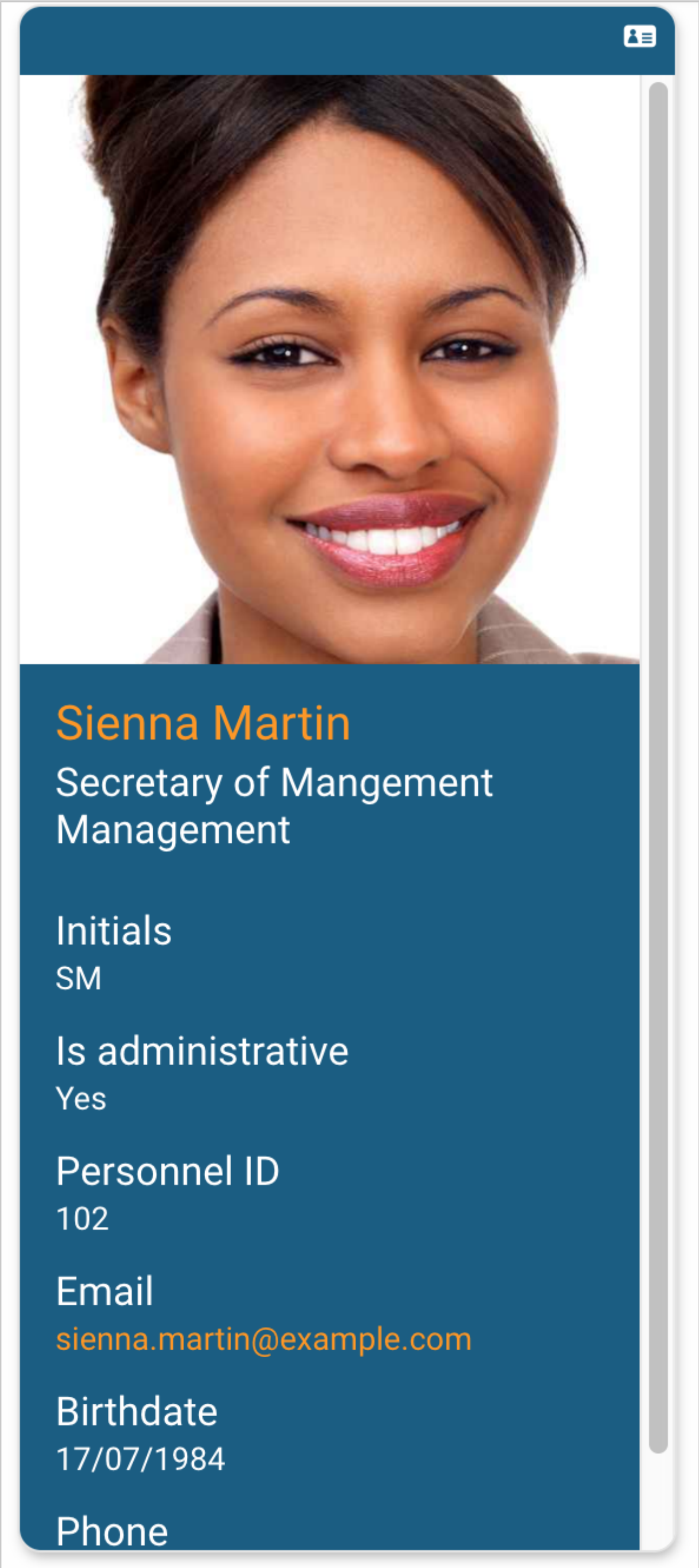


Fig. 148: View Mode - Information Area

Linked objects and the individual object name are displayed in the accent color (see Your own color scheme [▸ 112]).
Clicking on these objects takes you directly to the detail view (see Detail view [▸ 155]).

7. Settings Bar

The **settings bar** offers you different functions for customizing the display. Furthermore, you can press this bar and share the current view with other users.

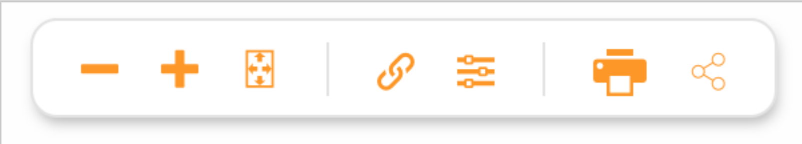


Fig. 149: View Mode - Settings Bar

	The **+** and **-** buttons zoom in or out of the organization chart.
	The **Reduce to page size** button selects the zoom factor and position of the organization chart so that it is fully visible.
	Using the **link icon** we define the conditions under which the link types (see Relations [▸ 92]) should be displayed and new links can be created. The dialog that opens for this will be described below.
	The **display options** button offers various options for regulating the range of displayed information in the boxes, and for activating and deactivating display rules. The dialog that opens for this will be described below.
	Using the **Output Current View** button you can print the organization chart with all currently displayed boxes either as an image file or PDF file. Alternatively, it is possible to generate a batch print as a PDF file. The Feature Set proceed PERFECT (or higher) is required for this.
	Share current view generates a link that other orginio users can use to access the current specific view.

The **link icon** allows you to adapt the display options of the available links (see Relations [▸ 92]).

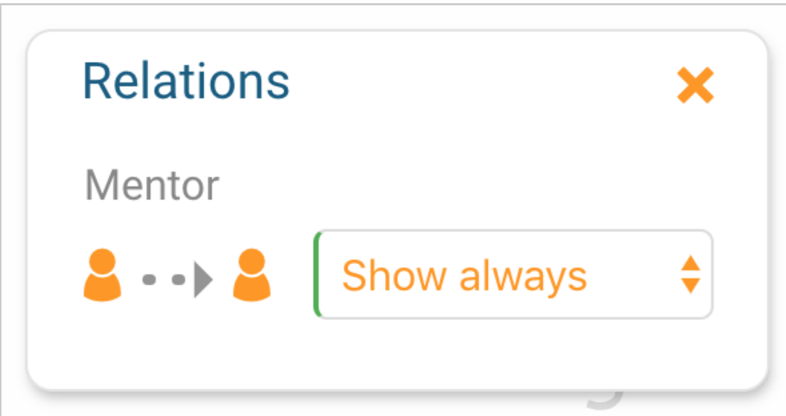


Fig. 150: View Mode - Settings Bar - Links

In the dropdown menu, you can define the conditions under which the link is displayed. The following options can be selected:

- **Do not display**: The link is hidden.
- **For selected object**: The link is only visible if the object for which a relation was stored is selected.

- **Always display**: The link is always displayed.

The **display options** button offers various options for regulating the range of information displayed.

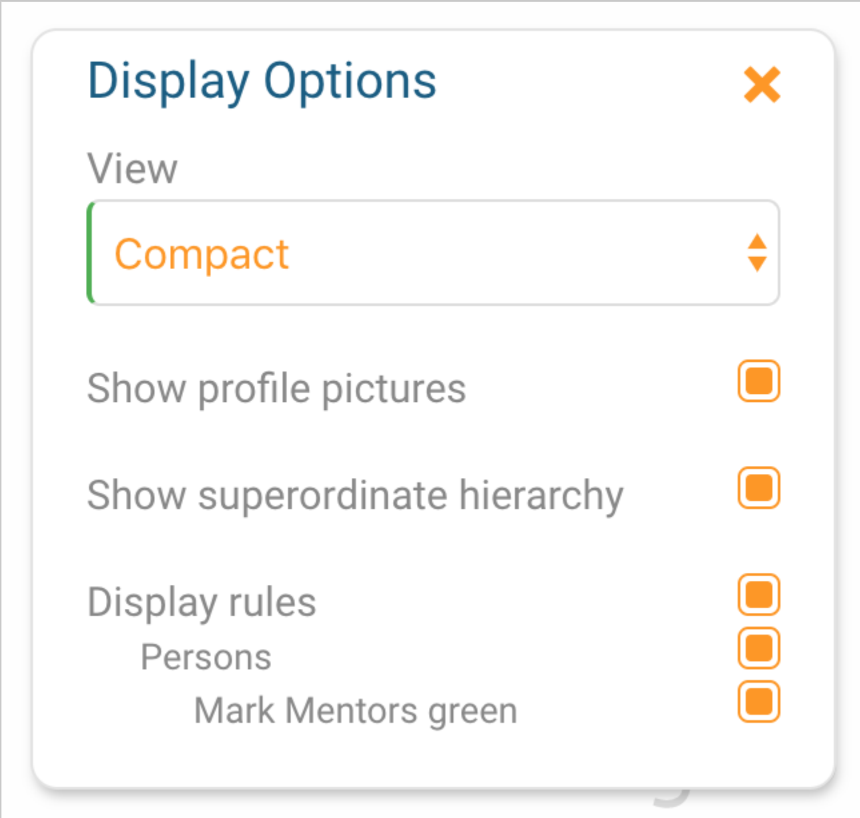


Fig. 151: View Mode - Settings Bar - Display Options

- **View:** Here you can switch between the possible views (see Standard Template [▸ 101]).

The following options are displayed depending on the view selected (see Standard Template [▸ 101]).

- **Show profile pictures**: The employee profile pictures are displayed or hidden. This is helpful for printing larger structures.
- **Show positions:** The positions in the organigram are displayed without clicking on an employee.
- **Show superordinate hierarchy**: The small hierarchy box above the currently highest object box generated by the parenthesis symbol (see Organization chart [▸ 139]) is displayed or hidden. Thus, it does not appear on the printout of the current view either.
- **Show display rules:** The existing display rules can be activated or deactivated individually. It is also possible to deactivate display rules for an entire object type. Users with the **Edit data** permission (see Users [▸ 116]), can create new display rules (see Display rules [▸ 109].)

The **Print** button prints the organization chart with all displayed boxes either as an image file or PDF file. **Share current view** generates a link that other orginio users can use to access the current specific view.

Fig. 152: Settings Bar - Output Current View

The **Export Current View as PDF** button offers severals options:

- **PDF**: Creates a PDF file of the current view
- **Image**: Creates a image file of the current view
- **Batch Print**: Creates a PDF file of the organisational chart. The file can be navigated by clicking on the boxes in a similar way as in orginio. Various options can be selected for printing the map. Map printing is available from the proceed Perfect feature set.

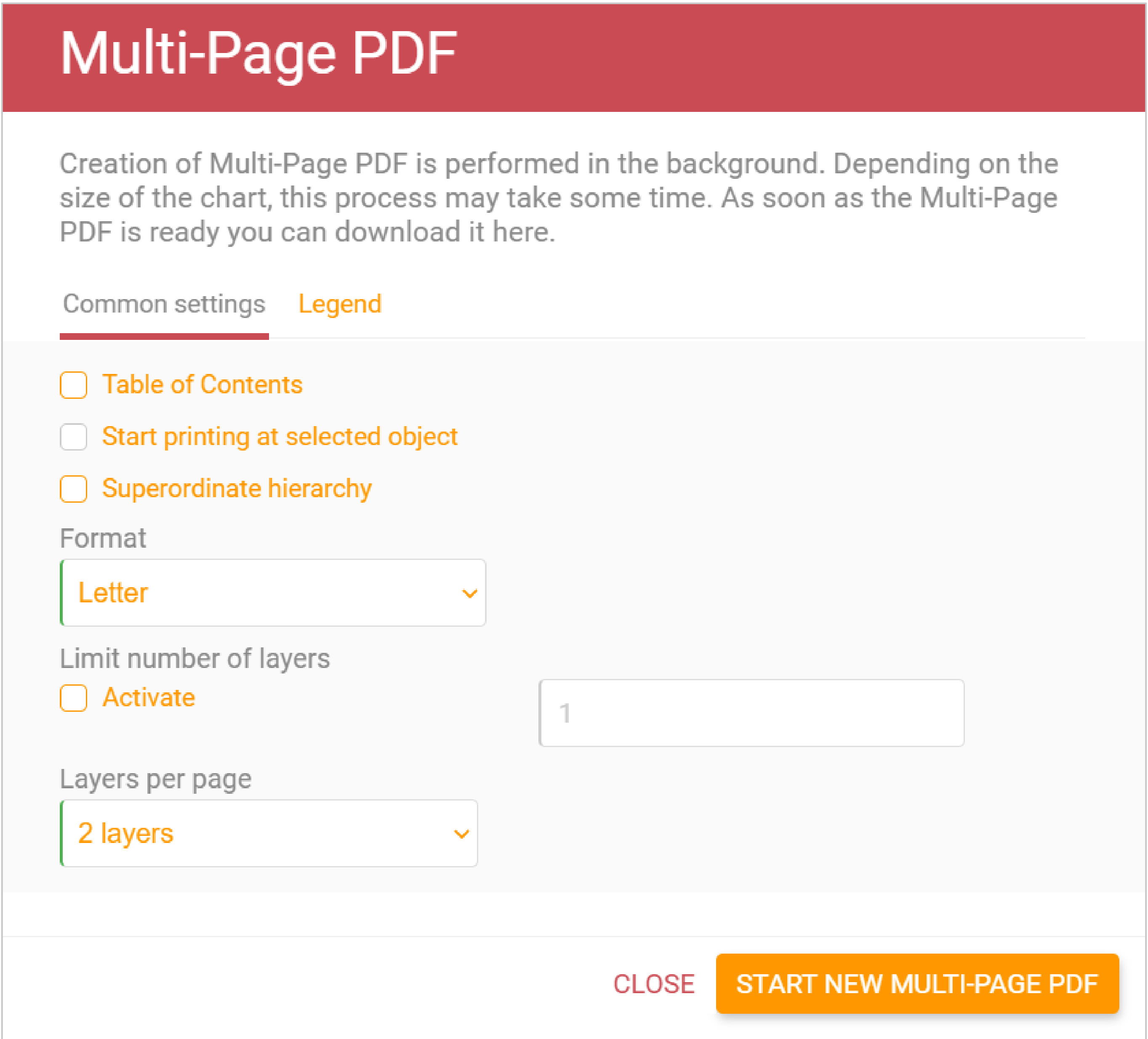


Fig. 153: Batch Print - settings

- **Index**: The index can be selected for the batch print
- **Root object**: It is possible to set the starting point as the root object or at selected object.

- **Limit number of layers:** Number of layers can be limited.
- **Layers per Page:** Here the number of layers per page can be set.

In the tab **Legend** you can set how the legend is displayed in the batch print.

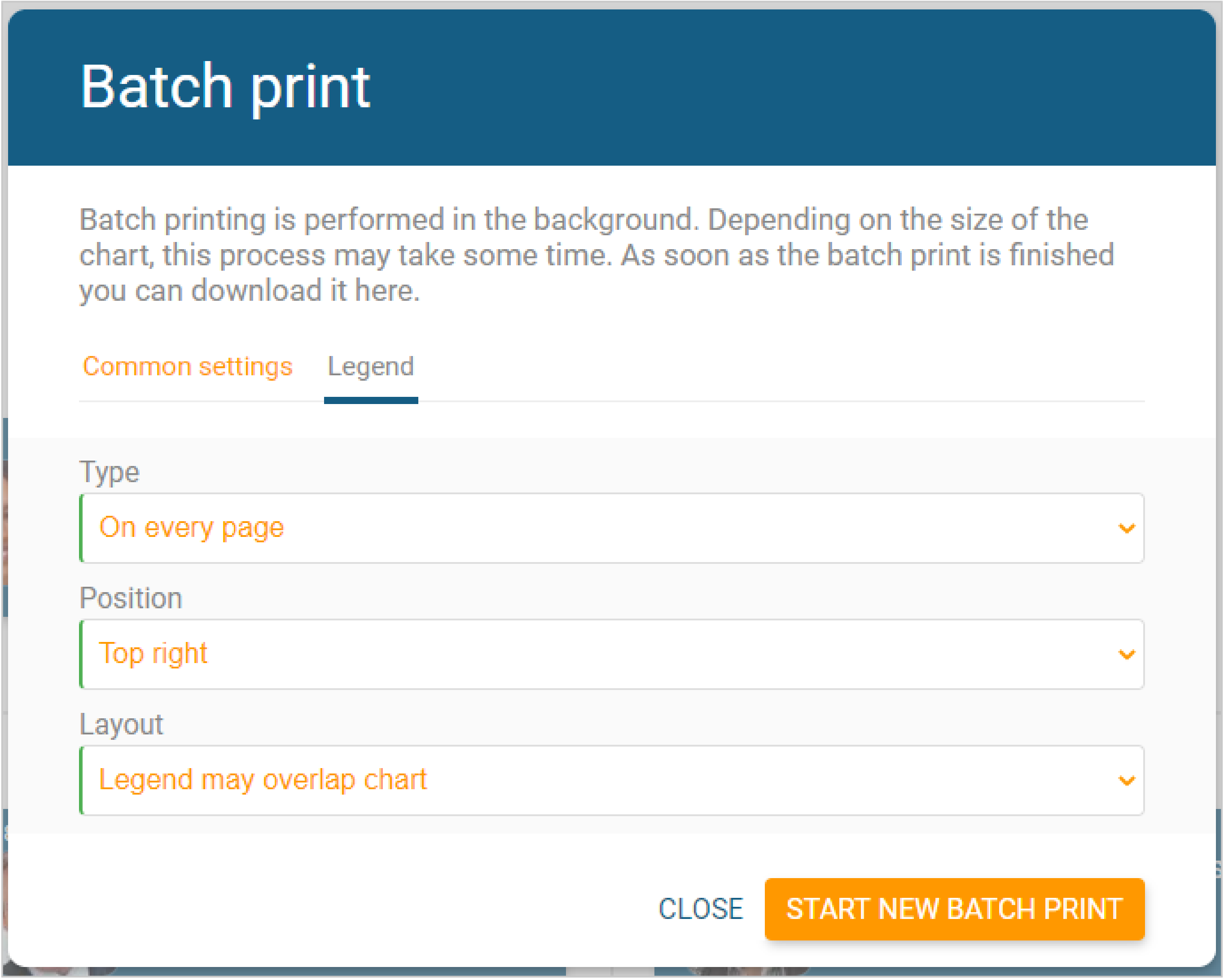


Fig. 154: Batch print - Legend

- **Type:** Sets how often the legend will be displayed.
- **Position:** Sets where the legend will be displayed.
- **Layout:** Sets if the legend overlaps the chart or if the organization chart will be displayed narrower.

As soon as the message **Batch print is available for download** is shown, the PDF file is available for download. You can open the dialogue by clicking on the message.

Fig. 155: Batch Print finished

8. Detail view

You can open the detail view of an object by double clicking on the name of the corresponding object or by clicking on the ... button (next to the name). Subordinated/assigned objects and information on the object itself can be found in this mask.

> **!** The number of listed link types depends on the object type and the data structure selected (see Selection of the appropriate structure [▶ 8]).
>
> Under department archives, subdivisions, managerial positions, assigned positions and information about the department itself can be found. Under position archives, the directly subordinated positions, the position held by employees and information about the position are displayed. Under person archives, the directly subordinated positions and information about the person are displayed.

Fig. 156: View Mode - Detail view

...-button

The **...** button allows you to switch to the **Edit mode** (see Edit mode [▶ 6]). Next to this button is the name of the object and below it is the **position display**.

Information

All stored information for this object is listed in this area, unless it was locked by a user with the **Edit data** permission (see Users [▸ 116]) in the access control settings (see Access Control [▸ 121]).

Assigned and subordinate objects

In the lower area, hierarchically subordinate objects and assigned objects are listed. You can switch to the detail view of the selected object by clicking on the **...** button. The contents of this area depend on the selected organization structure and selected data type (see Selection of the appropriate structure [▸ 8]).

II Settings

> **!** The content of the settings in the view mode is basically identical to the settings of the edit mode (see Settings [▸ 82]). Depending on the assigned user rights (see Users [▸ 116]), fewer or more settings will be displayed, however. Since most users only have basic rights, the settings are described in the view mode by means of the basic rights.

1. Basic settings

In the basic settings, the settings affecting your own **profile** are made. Here, you can change the specified **Email**, the **Password** as well as the **Display language**.

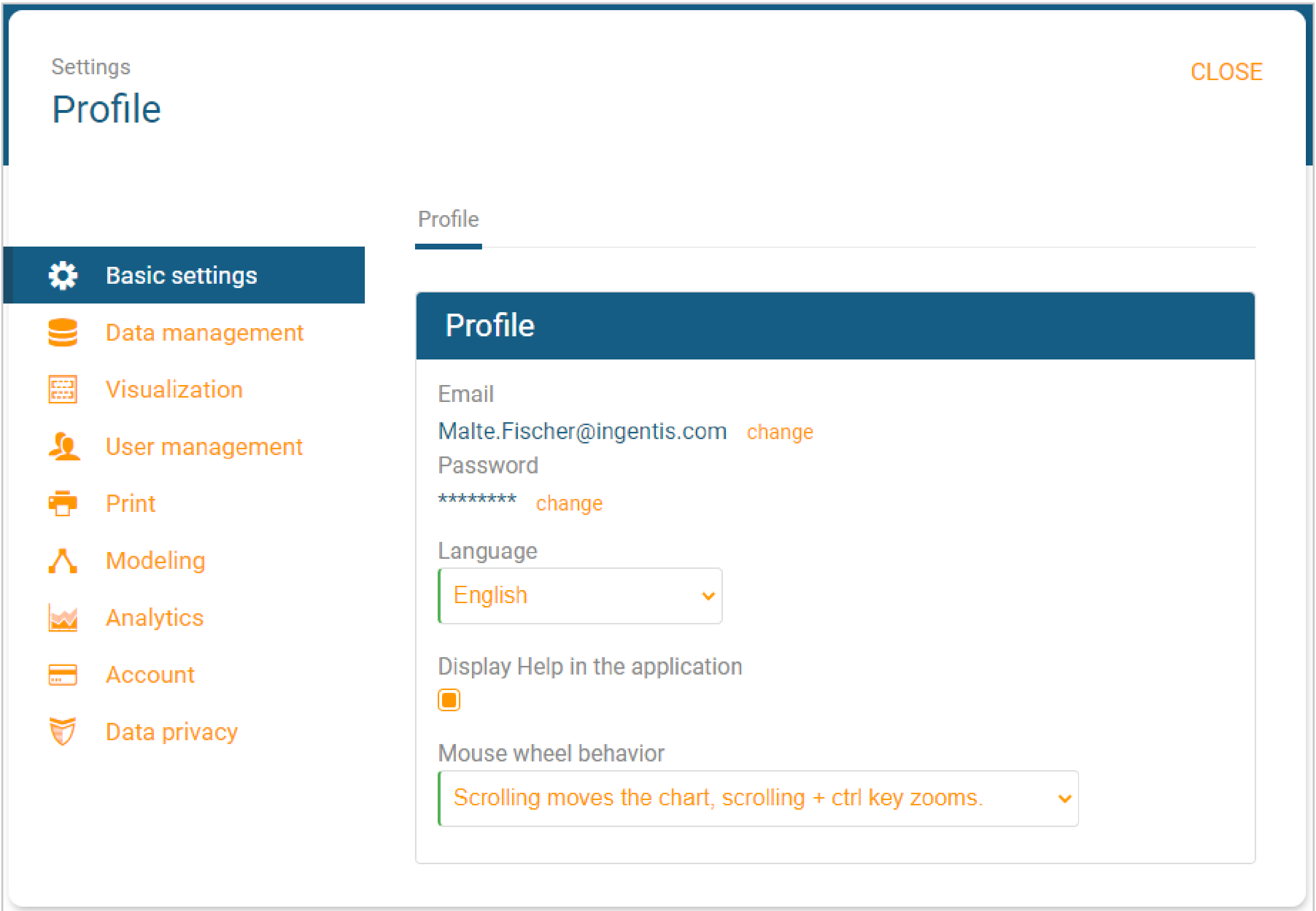


Fig. 157: Settings - Profile

If the option Display Help in the application is selected, on many occasions green question marks will be shown. By clicking on them helpful information gets displayed.

Fig. 158: question mark

In the change **email address** dialog you have to enter your new email address twice to prevent any errors. In addition, the password is required as confirmation.

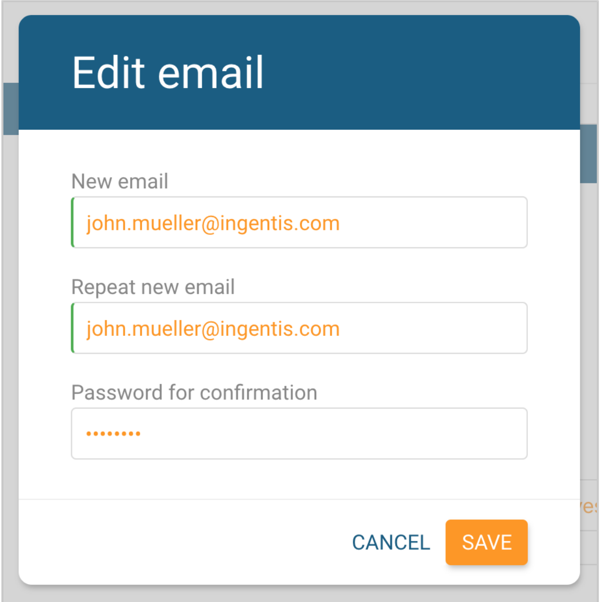


Fig. 159: Settings - Change email address

In the change **password** dialog you have to enter the new password for this user twice to prevent any errors. In addition, the old password is required as confirmation.

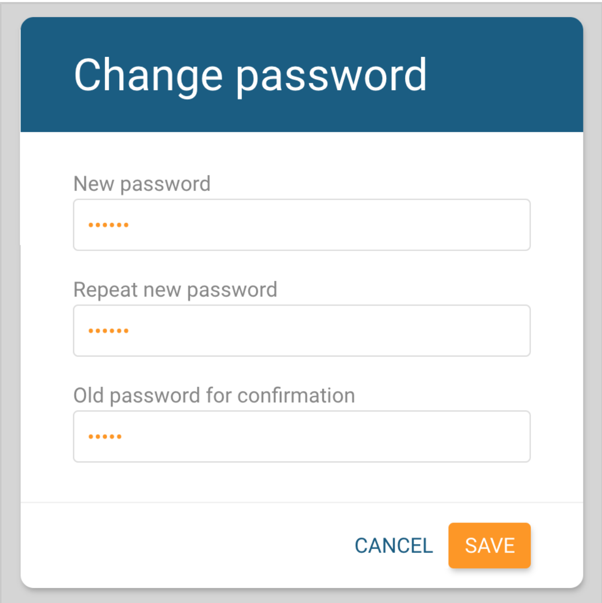


Fig. 160: Settings - Change password

The orginio software is available to you in German and English. Select the desired language in the drop-down menu.

Under **mouse wheel behavior** you can select whether scrolling the mouse wheel on the organization chart surface should result in zooming or downward and upward movements. By pressing the CTRL button simultaneously and scrolling, the other corresponding behavior is executed.

2. Standard Template

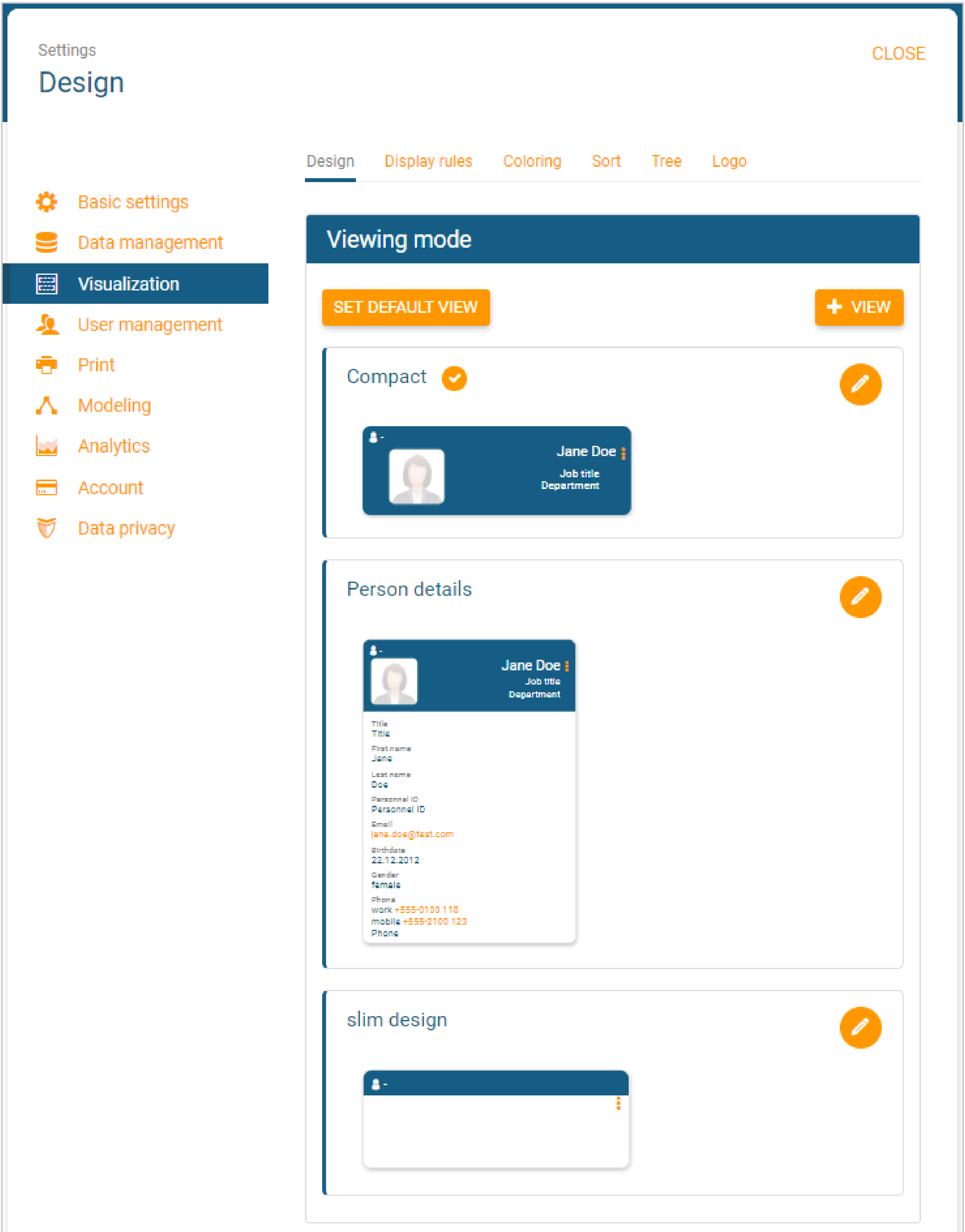


Fig. 161: Einstellungen - Template

Compact

In the **Compact** view the org unit name is displayed. Next to the org unit name is the **...** button. This button takes you to the detail view. Furthermore, the managers (title + first name + surname) are displayed in the org unit area. The employees (title + first name + surname) of the org unit are listed under the managers. If a photo for the employee was stored by the user with the "Edit data" permission, the picture will be displayed next to the employee name. If no photo was uploaded, the initials consisting of the first letter of the first name and the first letter of the surname will be displayed. If you click on an employee, the job title will be displayed in the organization box below the employee name. If the position is unfilled, the job title is displayed.

Person details

In the Person details view a box is displayed for each employee. Displayed next to the employee photo is the employee name (title + first name + surname) and the job title. Furthermore, the email address, date of birth and telephone number are displayed in the box.

! Unfilled fields are hidden.

E How-To

I Fill multiple positions (professional)

Do you want to assign a person to an additional position who already has a position?

Option 1: Make settings directly on the person

Hold down the Ctrl button and drag the desired person from the object list onto the additional position in the organization chart. It will now be displayed on both positions.

Option 2: Make settings directly on the position

Double click on the position on which you want to additionally place the person. Then select the "employee" entry via the dropdown menu of the "+" symbol. Then enter the name of the employee who you want to assign another position to. You will then be asked whether the original position should be preserved or whether it should be canceled and the employee should only be set to the new position.

Example:

The accounts department employee, Sabine Böhm, from the internal services is to be set additionally as a secretary to the secretariat. Her original position should be preserved so that she is displayed on both positions.

Option 1: Drag & Drop

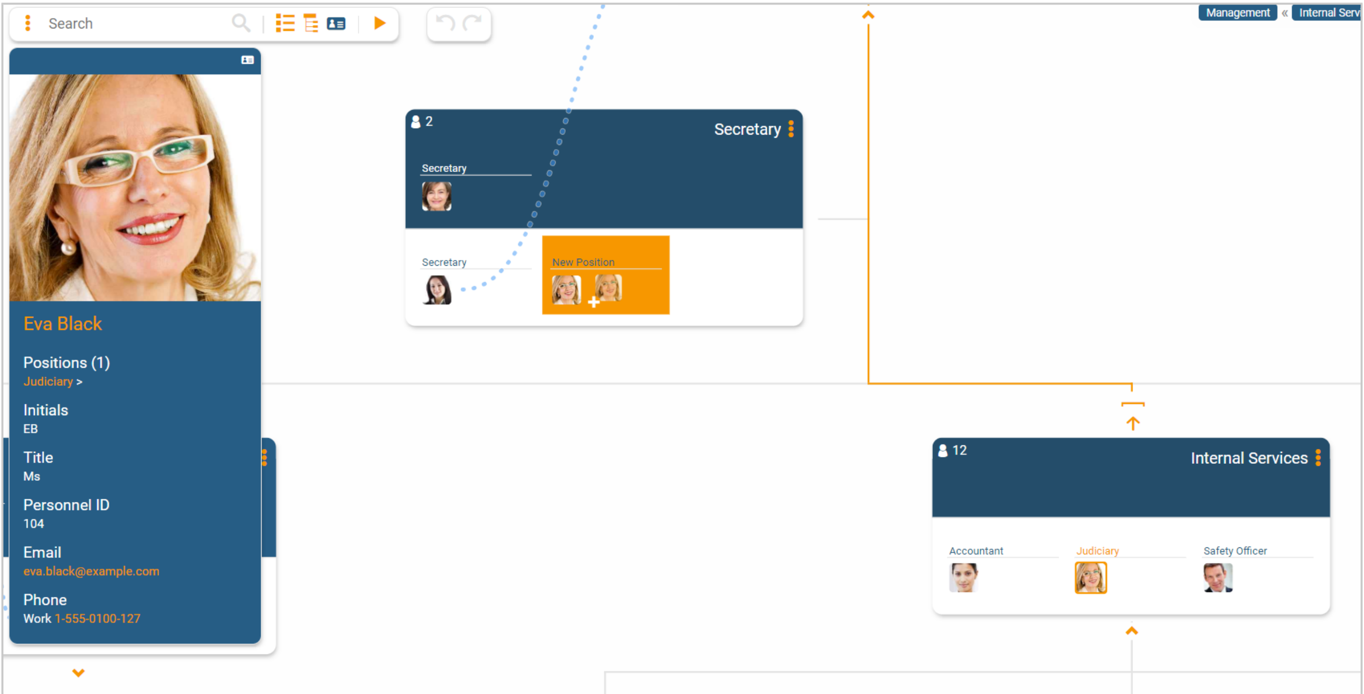


Fig. 162: How-To - Setting directly on the person

Option 2: Add an additional employee in the position dialog

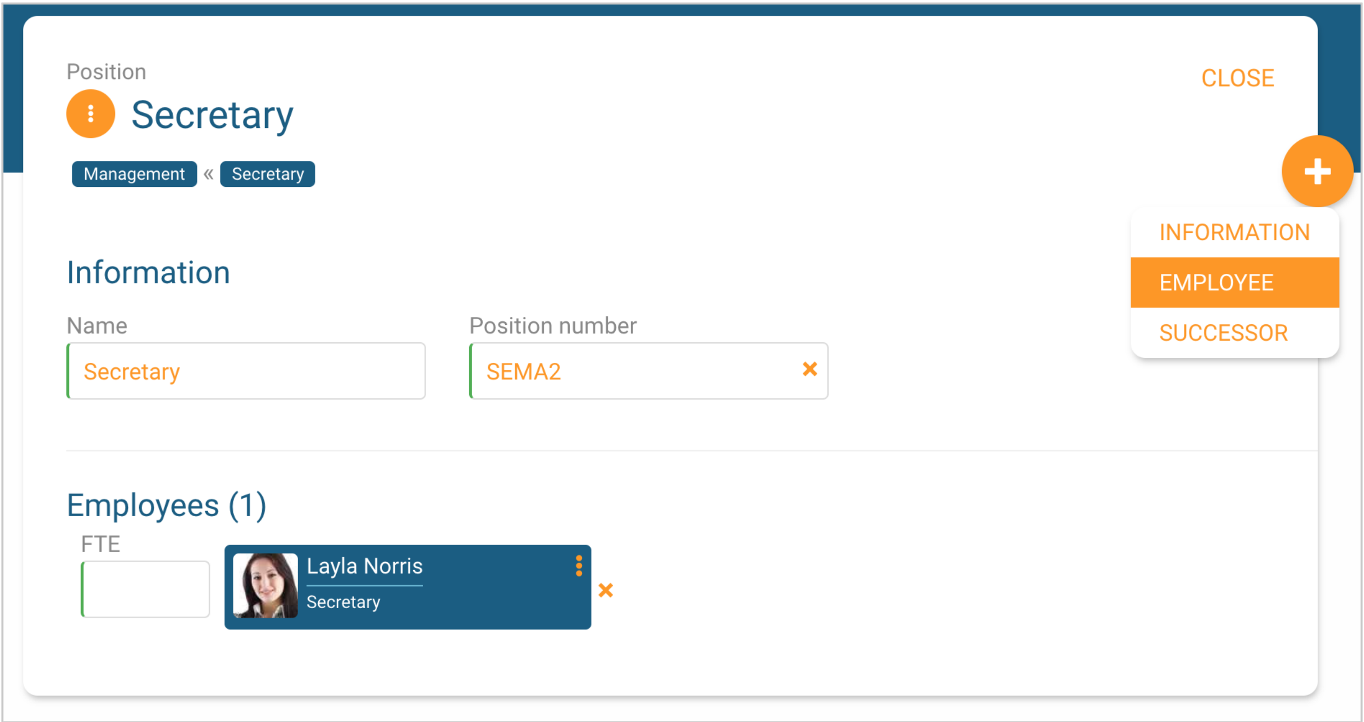


Fig. 163: How-To - Add an additional employee in the position dialog

Select secretary and employee option using the plus sign.

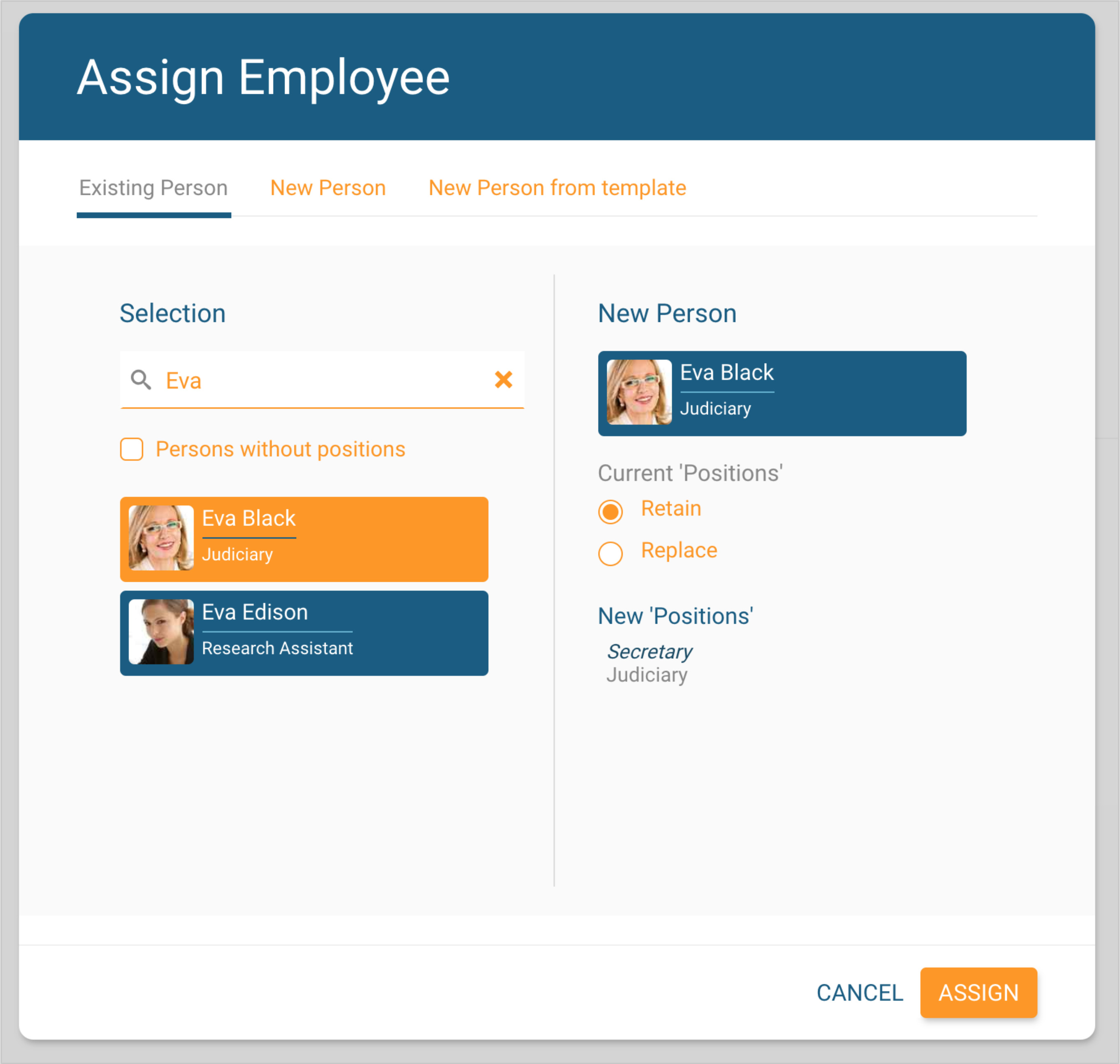


Fig. 164: How-To - Assign an additional employee in the position dialog

Search for Sabine Böhm und select whether the original position should should be preserved.

F Feature-Sets

Here you will find an overview of our features sets. You can find more information and the price calculator on our website: https://www.orginio.de/pricing/.

	start SMART	proceed PERFECT	complete COMFORT
Objects	Number of objects selectable*	Number of objects selectable	Number of objects selectable
Editors	Number of editors selectable**	Number of editors selectable	Number of editors selectable
Display mode	Unlimited users for display mode	Unlimited users for display mode	Unlimited users for display mode
Color scheme	Predefined data scheme	Customizable	Customizable
Logo	No	Yes	Yes
Box designer	No	Yes	Yes
Hierarchy Tree	No	Yes	Yes
Access protection to information	No	Yes	Yes
Batch print	No	Yes	Yes
Key performance indicators	No	Yes	Yes
Display rules	No	Yes	Yes
Single Sign On	No	Yes	Yes
User-defined data scheme	No	Yes	Yes
Additional relations	No	No	Yes
Modification log	No	No	Yes
Data Recovery	No	No	Yes
Modeling	No	No	Yes
Alternative Hierarchy	No	Yes	Yes

* up to 50 objects free of charge. As soon as the limit of 50 objects is exceeded, orginio offers the user a free trial period of two weeks. Afterwards it is mandatory to enter the payment data.
** Up to 5 editors free of charge

Updated: 20.10.2021

G SSO in orginio with Azure AD

MS Azure AD can be used as an identity provider (IDP) with orginio for enabling a Single Sign-on for the application. This chapter describes the necessary configuration steps.

Step 1: Add orginio as a Non-gallery application in Azure AD. Application name can be specified as desired (not need to match with the actual application name).

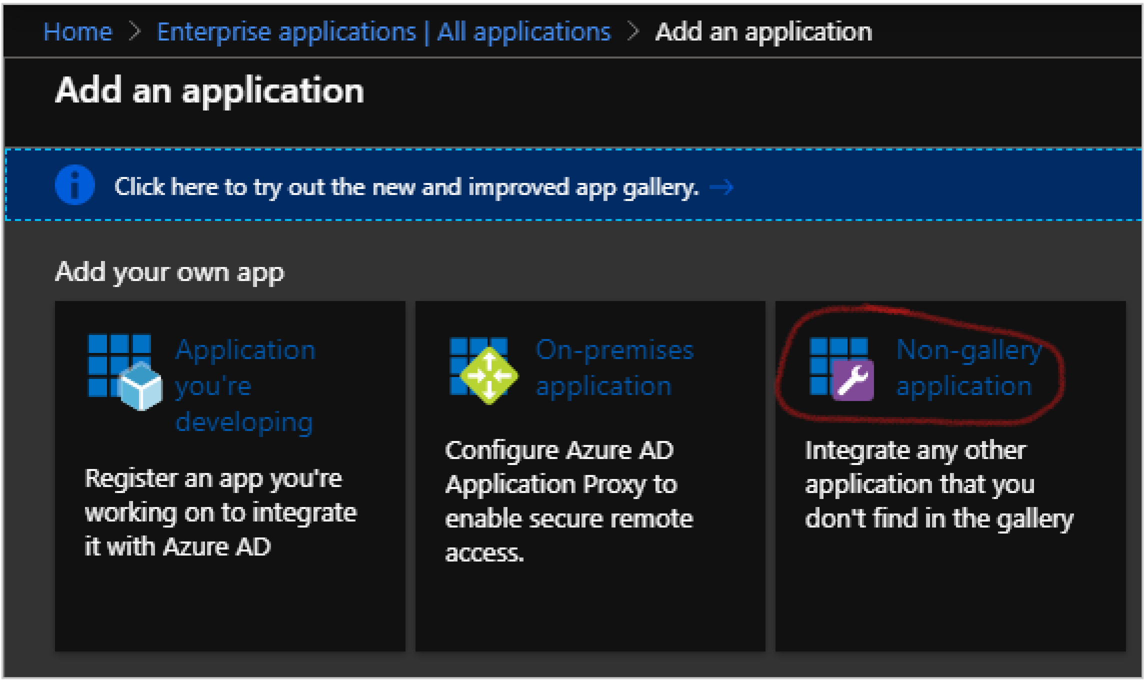


Fig. 165: Azure AD - Add an application

Step 2: Select SAML as method for single sign-on

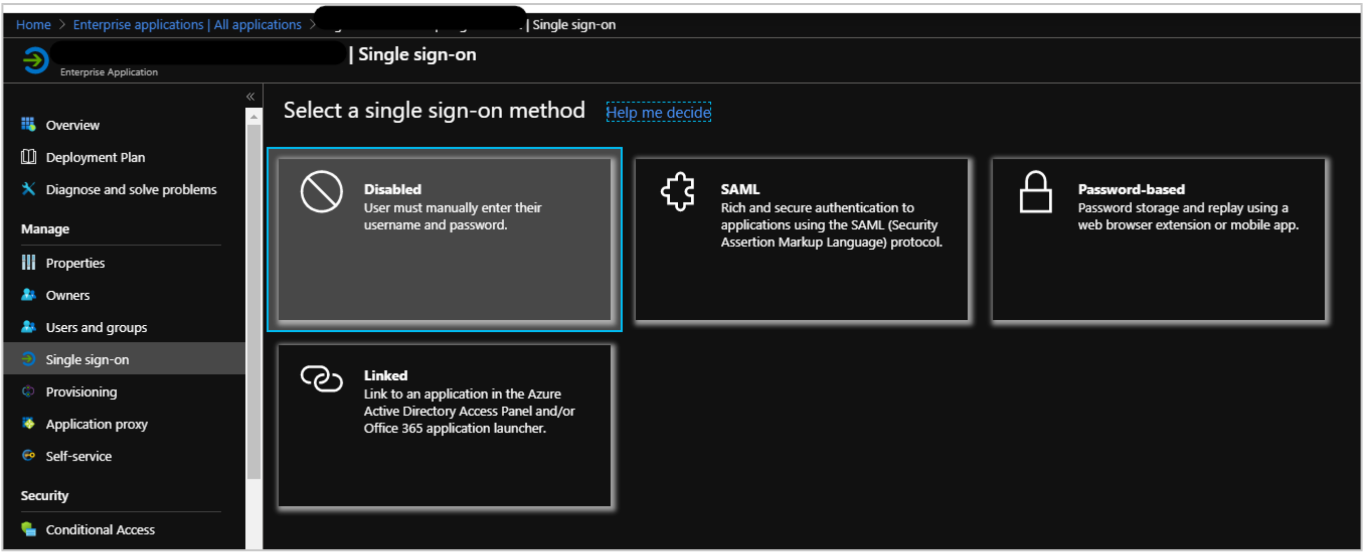


Fig. 166: Azure AD - Select SSO method

Step 3: In orginio go to **Settings** → **User management** → **SSO**. Click on button **CHANGE PROVIDER** and select **SAML 2.0** from the list of supported providers.

Now the orginio metadata needs to be downloaded by clicking on the highlighted link in the orginio screen.

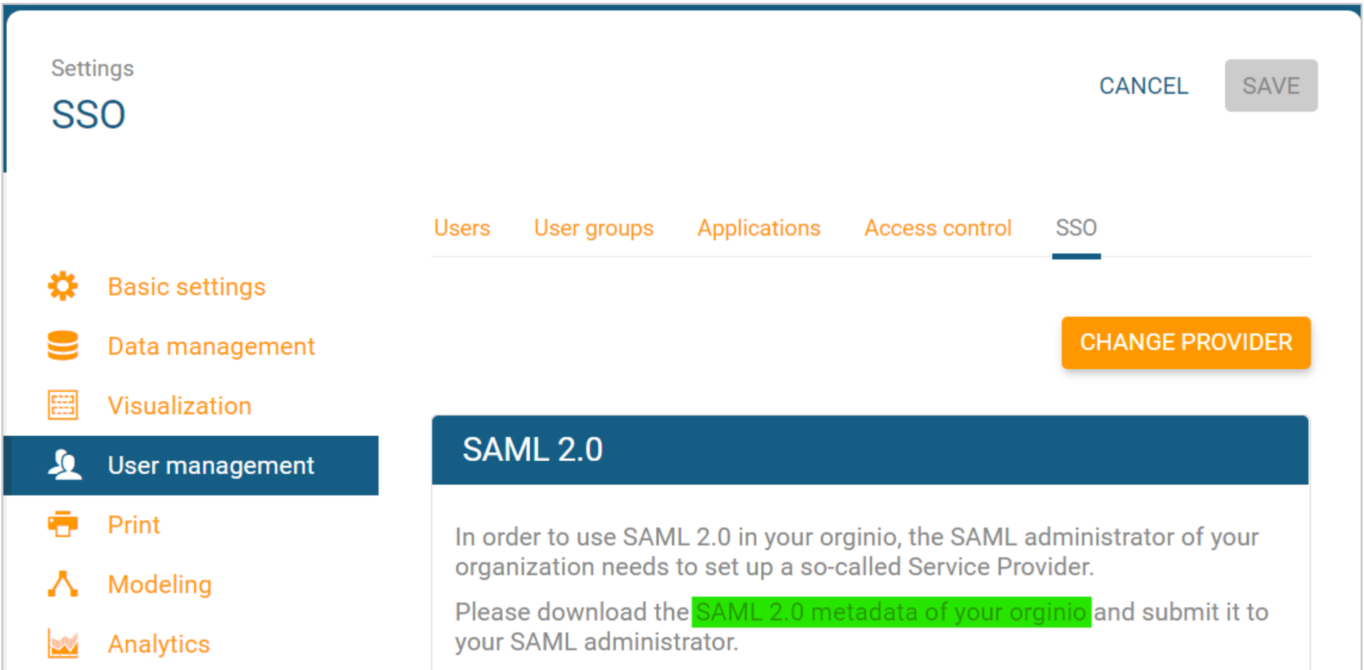


Fig. 167: orginio - Metadata download

Step 4: Back in Azure AD, edit **Basic SAML Configuration:**

- Insert **entityID** from orginio-metadata-xml into field **Identifier (Entity ID)**.
- Insert **Location-URL** from orginio-metadata-xml into field into **Reply URL**.

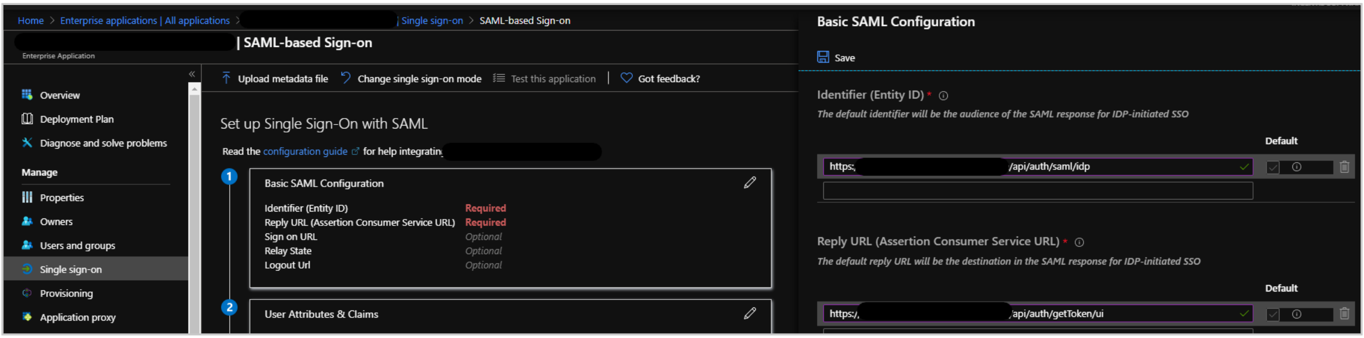


Fig. 168: Azure AD - Edit SAML configuration

Step 5: Edit **User Attributes & Claims**:

- Edit required claim **Unique User Identifier (Name ID)** to be e-mail.

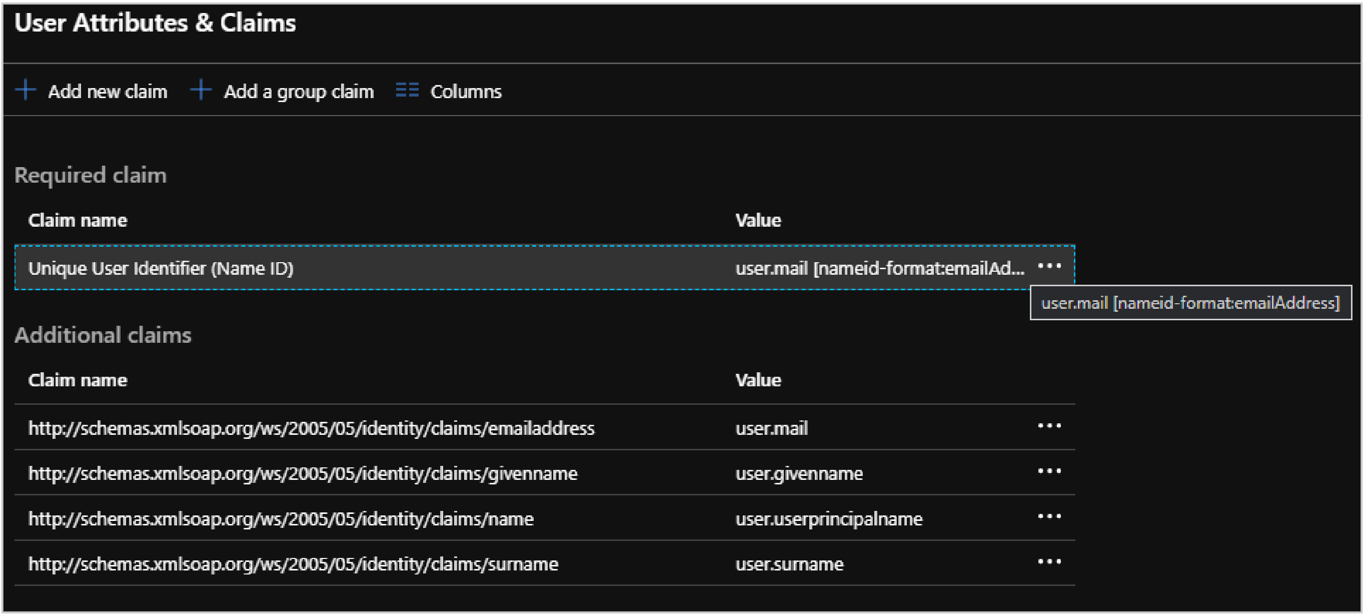


Fig. 169: Azure AD - Edit user attributes and claims

Step 6: SAML Signing Certificate

- Edit Notification Email Addresses as needed
- Download certificate as BASE64

Step 7: In orginio

- Insert **Login URL** from Azure AD into **1. STS SAML 2.0 Endpoint URL**
- Open downloaded certificate from Azure AD with Notepad editor and paste the whole content into **2. STS / IdP Signing Certificate (Base64)**

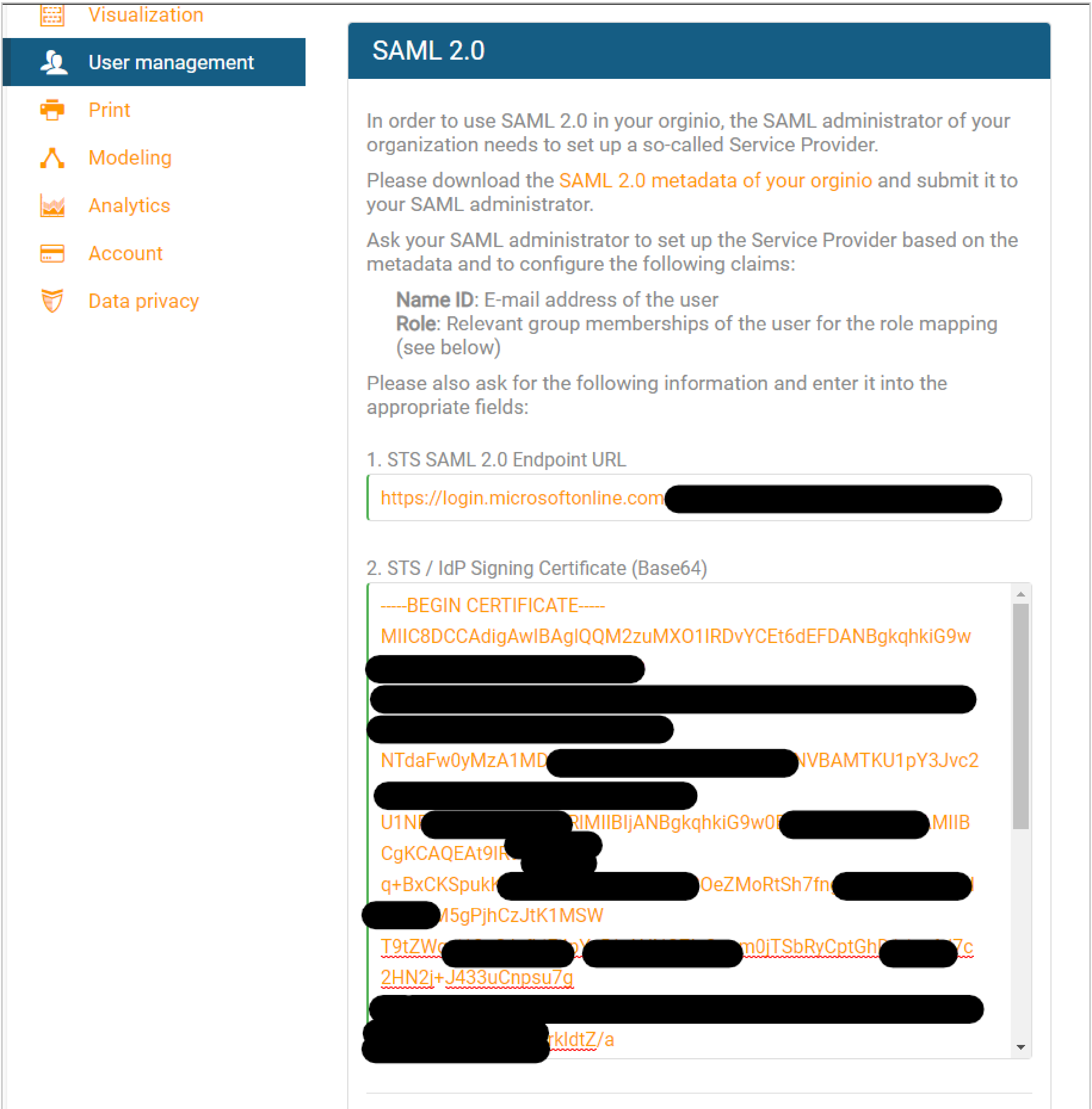


Fig. 170: orginio - Configure SAML 2.0 IDP

Step 8: Assign AD members to your created application

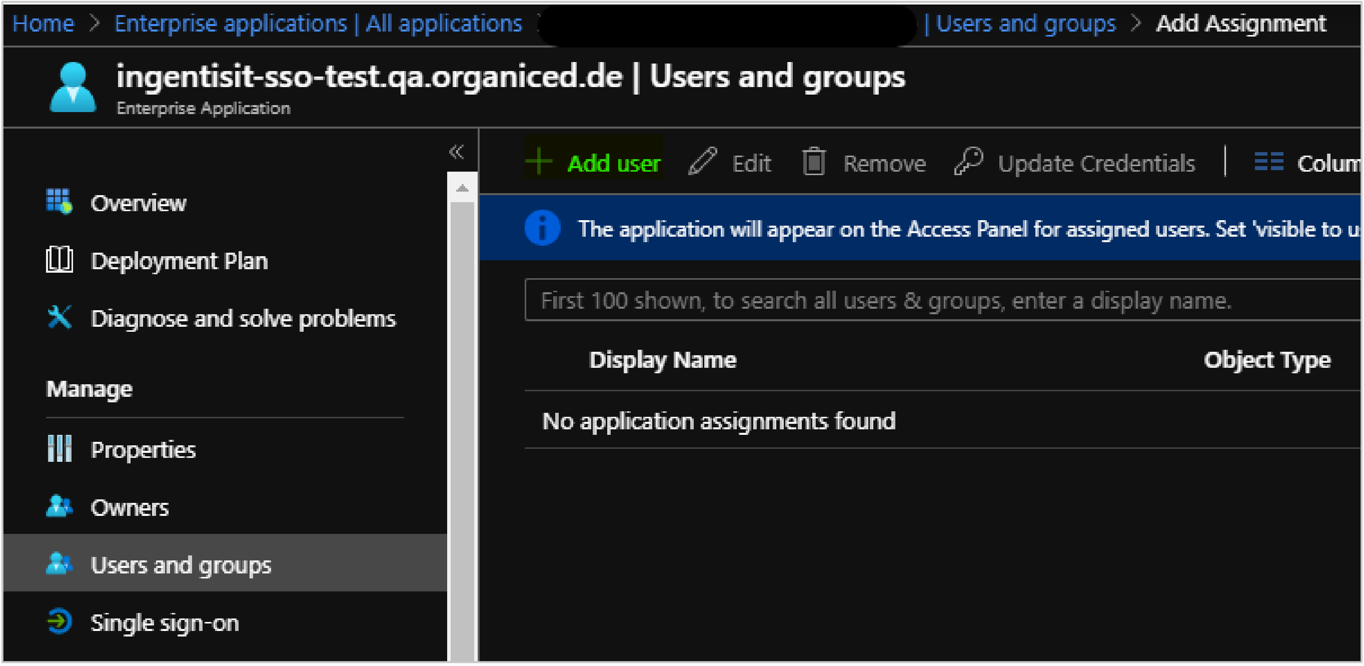


Fig. 171: Azure AD - Assign members to application

Step 9: (Optional). To assign roles (for the role mapping in orginio) in Azure AD, they must first be added to the manifest.

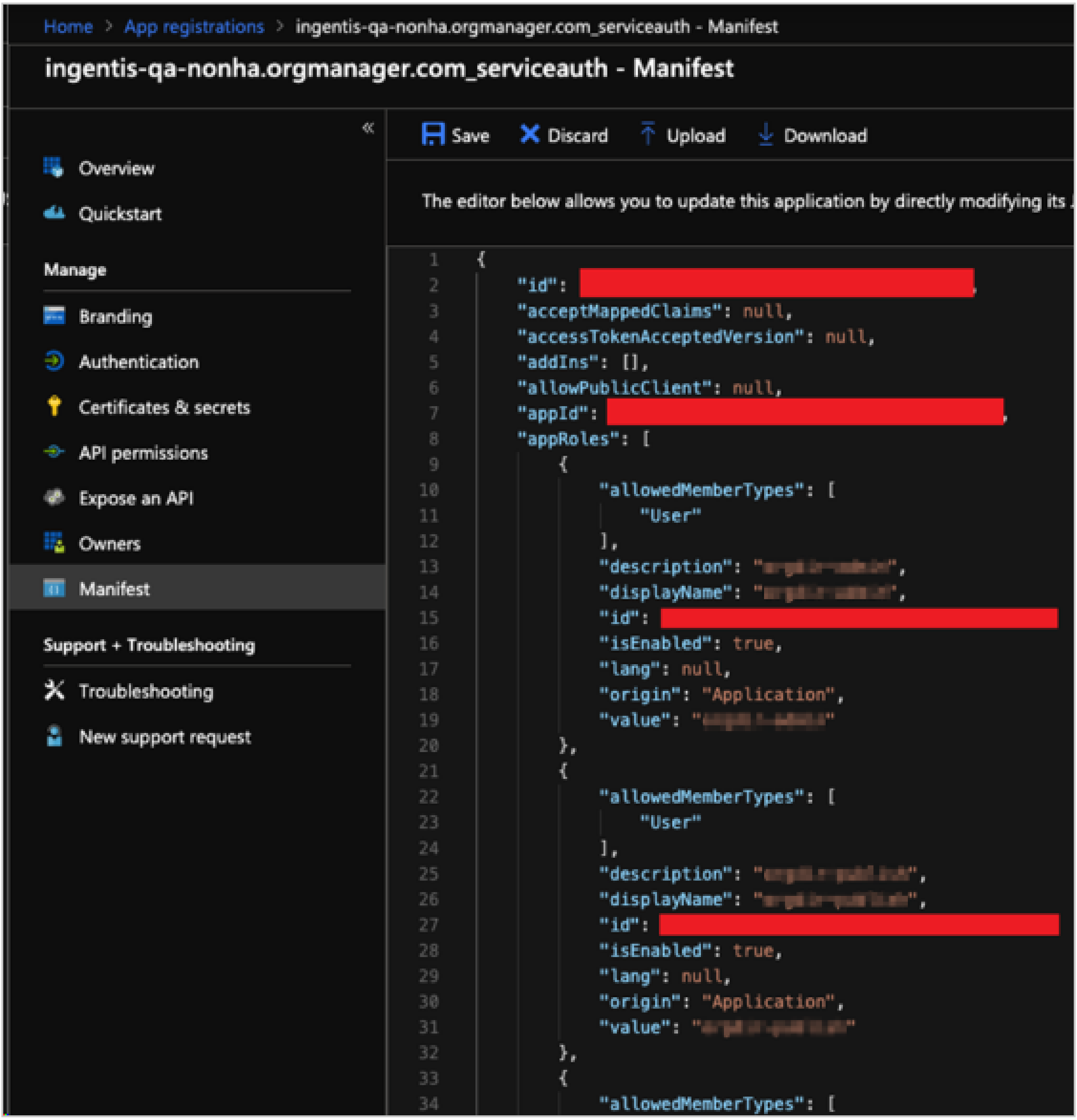


Fig. 172: Azure AD - Edit Manifest

{
"allowedMemberTypes": [
"User"
],
"description": "orginio-edit",
"displayName": "orginio-edit",
"id": "CREATE_A_NEW_GUID",
"isEnabled": true,
"lang": null,
"origin": "Application",
"value": "orginio-edit"
}

Note: further information on the topic of Application Roles can be found at https://docs.microsoft.com/en-us/azure/architecture/multitenant-identity/app-roles.

Step 10: (Optional): Subsequently, the corresponding users are assigned to their roles / claims via Enterprise applications.

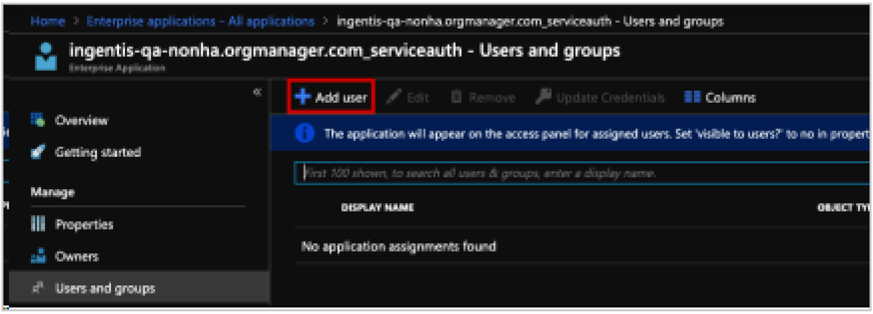


Fig. 173: Azure AD - Users and Groups

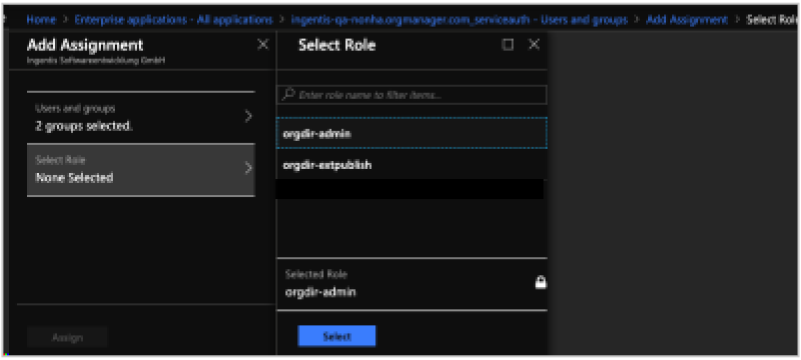


Fig. 174: Azure AD - Add Role