



OrgChart Configuration and User Guide

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Version Number: 2.0

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Introduction

Disclaimer

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QSF initiative

Salesforce Quick Start Apps (QSA) consists of applications build by Salesforce.com engineers.

Inspired by employees' work with customers of all sizes and industries, these apps range from simple utilities to increase productivity to app backlog solutions.

Salesforce Quick Start apps are free to use, but are not official [salesforce.com](https://www.salesforce.com) products, and should be considered community projects - these apps are not officially tested or documented.

Quick Start Apps can be deploy into customer sandbox for easy adoption (i.e. change fields / field names) by the customer / its system integrator.

Quick Start Apps can be freely used and modified by customers. Salesforce.com support is not available for these applications.

OrgChart in a Nutshell

This section is intended to give you a brief overview on what is the OrgChart App and how to use it.


OrgChart app has been developed and optimized to be used on Salesforce1 App to get an easy and immediate access to the enterprise org on the road.


From within Salesforce1 App it's very useful to get a comprehensive view of your enterprise organization and being able to search someone, get a graphical view on his/her position and have handy actions like sending an email or make a call.


Installation


Package Installation


The installation of the app is straightforward. You just need to install the app as an unmanaged package.

 **Install PSE_OrgChart**
By Org Chart

 **What if existing component names conflict with ones in this package?**
☒ Do not install.
☐ Rename conflicting components in package.


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
PSE_OrgChart	Org Chart	Winter'16	1.1

Description
Mobile Tab on Salesforce1 to display Org Char

Additional Details [View Components](#) [API Access](#)

To do that, go to the QSF store link (<https://qsforce.com>) and choose the OrgChart app, or any other app you would like to install.

You will be redirected to the OrgChart app page with the instruction for:

- The installation
- The post installation
- The configuration

Basically, all this is described in details in the present document.

To get the credentials to access the QSF Store, please reach out our Salesforce Account Executive.

The OrgChart installation link is:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t240000006LCy>

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Once you have copied and pasted the installation link in your Salesforce Org, if not logged to your Org already, you will be prompted to log in to in order to install the package and then just follow the self-explanatory instructions.

Click the ‘Install for All Users’ check box and then click the “Install” button.

You will see a message telling you the package is installing. It takes about 2 minutes to get it available on your Org.



Install PSE_OrgChart

By Org Chart



Installing and granting access to all Users...

App Name	Publisher	Version Name	Version Number
PSE_OrgChart	Org Chart	Winter'16	1.1
Description			
Mobile Tab on Salesforce1 to display Org Char			
Additional Details View Components API Access			

Notice the version number and description of the package for further information.

The “Installation Complete!” message pops up when the installation is done. You should receive an e-mail confirming it as well.

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Install PSE_OrgChart

By Org Chart



Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
PSE_OrgChart	Org Chart	Winter'16	1.1
Description			
Mobile Tab on Salesforce1 to display Org Char			

Click on the “Done” button, this is as simple as that!

Check Installation

Then, you are brought to the “Installed Packages” page where you can see the “OrgChart” package installed.

Clicking the “OrgChart” link will give you the details on the components that have been installed by this package (Objects, Layouts, Apex Classes and triggers, Visualforce pages, Lightning components etc).

From the Setup menu > Installed Packages

Installed Packages													
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects
Uninstall	PSE_OrgChart	Org Chart	1.1		N/A	N/A	N/A	N/A	11/24/2015 8:31 AM	✓	0	1	0
Description Mobile App on Salesforce1. Display organisational hierarchy + contact info + one touch call/eMail.													

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Below, details information about the OrgChart Package.

The screenshot shows the 'Package Details' page for 'PSE_OrgChart'. It includes a 'Back to List: Installed Package' link, 'Uninstall' and 'View Dependencies' buttons, and a table of package details. Below this is a 'Package Components' table listing various components like Apex Classes, Tabs, and Lightning Component Bundles.

Package Name	PSE_OrgChart	Version Number	1.1
Language	English	Package Type	Unmanaged
Version Name	Winter'16	Modified By	Frederic Daurelle, 11/24/2015 8:31 AM
Publisher	Org Chart		
Description	Mobile App on Salesforce1. Display organisational hierarchy + contact info + one touch call/eMail.		
Installed By	Frederic Daurelle, 11/24/2015 8:31 AM		
Count Towards Limits	✓	Tabs	1
Apps	0	Objects	0

Action Name	Parent Object	Type
PSE_OrgChartCptCtI		Apex Class
PSE_Org Chart		Tab
PSE_OrgChartCptCtITest		Apex Class
PSE_OrgChartCpt		Lightning Component Bundle
svg		Lightning Component Bundle
SLDS0102		Static Resource

The OrgChart App is installed

The OrgChart App is a mobile app available through Salesforce1 mobile App, and is not exposed through the app picker. It is composed of Lightning Component, Apex Classes and a Tab to be display through Salesforce1 app.

Salesforce1 App Configuration

In order to make “OrgChart” App available on your Salesforce1 Mobile App the following steps are required.

On the setup menu go to:

- Mobile Administration > Salesfoece1 Navigation
- On the available Tabs select “Org Chart”

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Navigation Menu Items Save Cancel

Available		Selected
Org Chart	Add ▶ Remove ◀	Feed
People		Today
Groups		Dashboards
Reports		Tasks
		Notes
		Smart Search Items
		Events
		Approvals
		Paused Flow Interviews

Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.

Save Cancel

- Move it to the “Selected” section
- Click on “Save”

Navigation Menu Items Save Cancel

Available		Selected
People	Add ▶ Remove ◀	Feed
Groups		Org Chart
Reports		Today
		Dashboards
		Tasks
		Notes
		Smart Search Items
		Events
		Approvals
		Paused Flow Interviews

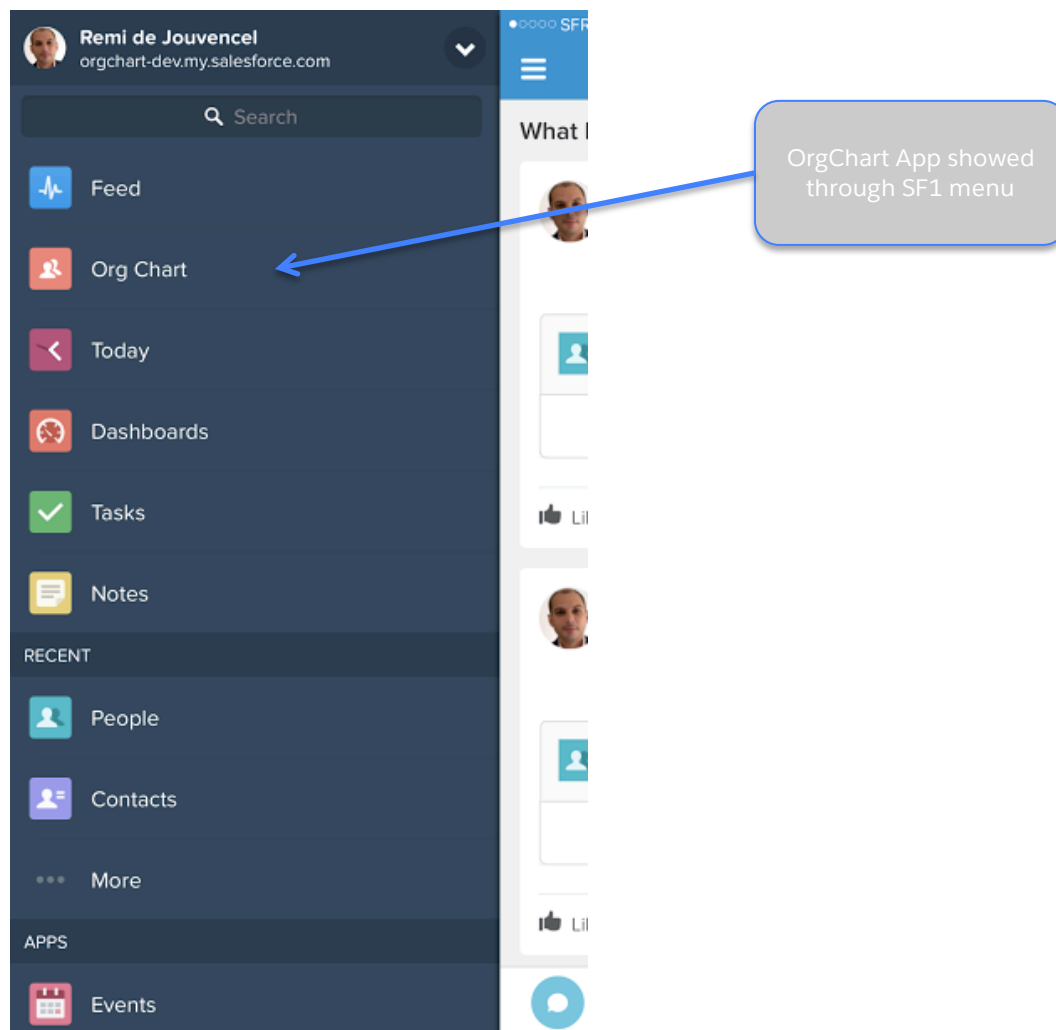
Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.

Save Cancel

The “OrgChart” app is now available on your Salesforce1 mobile app. Just refresh it, and the application should appear like below:

Post Installation

The “OrgChart” App does not require any post installation step. It can be use as is.



Configuration

There is no specific configuration step to use “OrgChart” app. However as this application requires the use of Salesforce1 app, the obvious prerequisite is to download and install this application on your smartphone.

Salesforce1 App for Ios

<https://itunes.apple.com/gb/app/salesforce1/id404249815?mt=8>

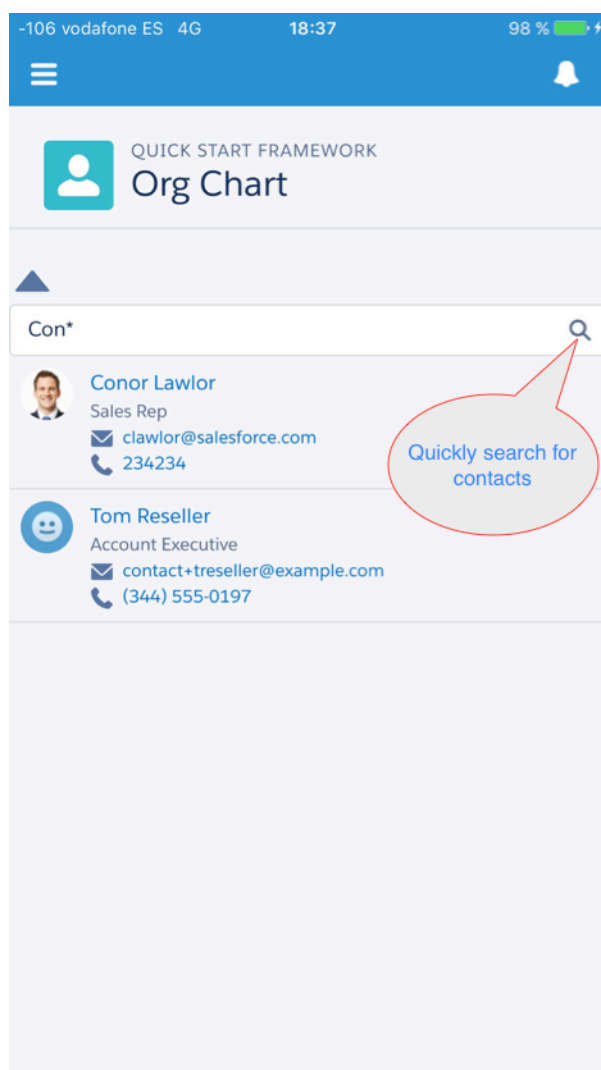
Salesforce1 App for Android

https://play.google.com/store/apps/details?id=com.salesforce.chatter&hl=en_GB

How to use the OrgChart App

Although it is a simple application OrgChart App has many graphical and power features.

Search

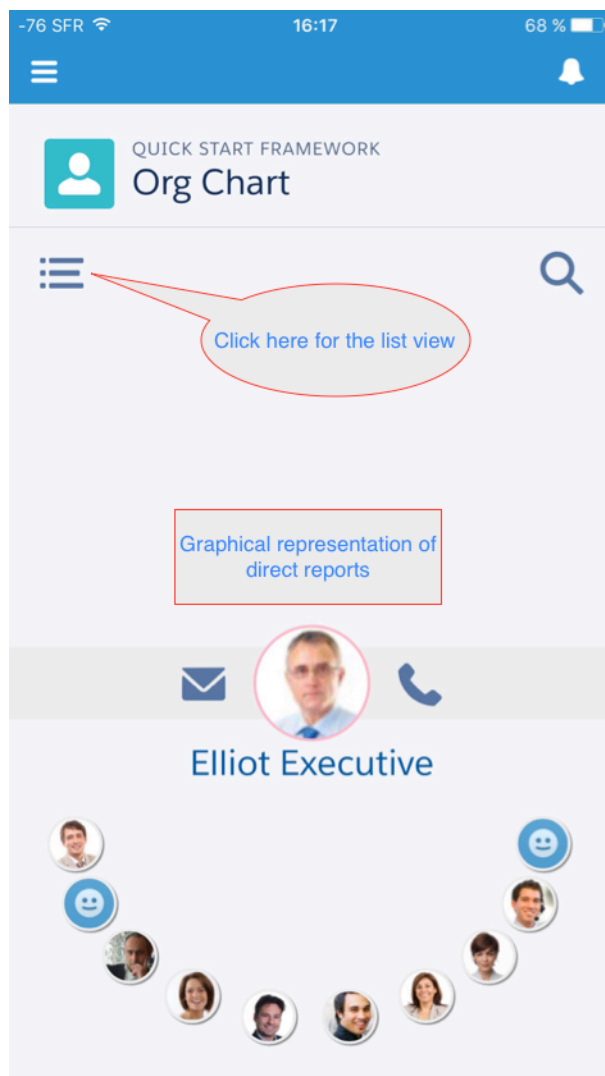


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Display reports by avatar

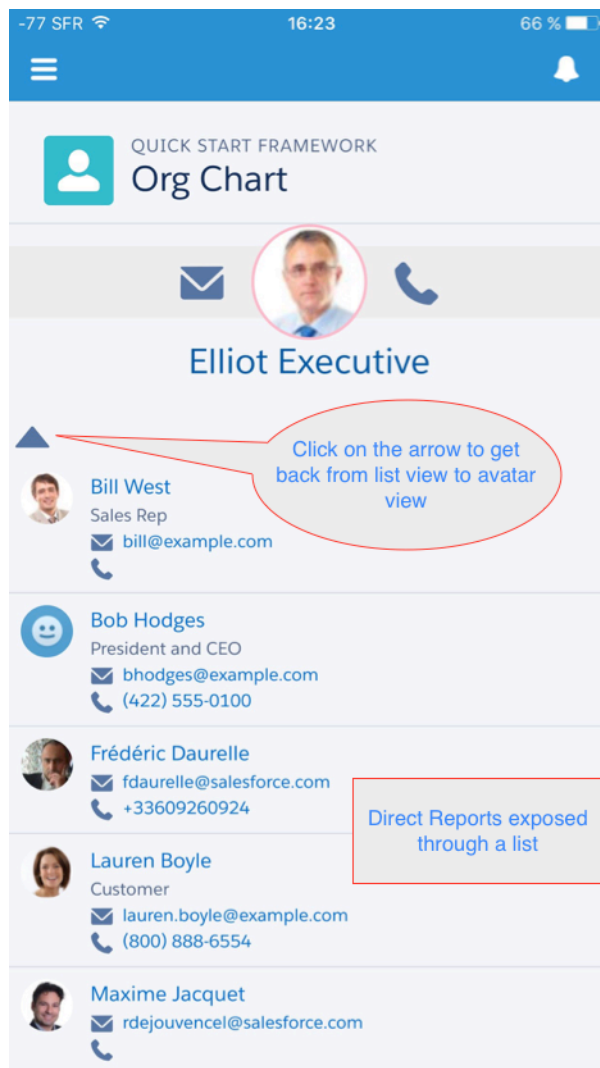


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Display report by list

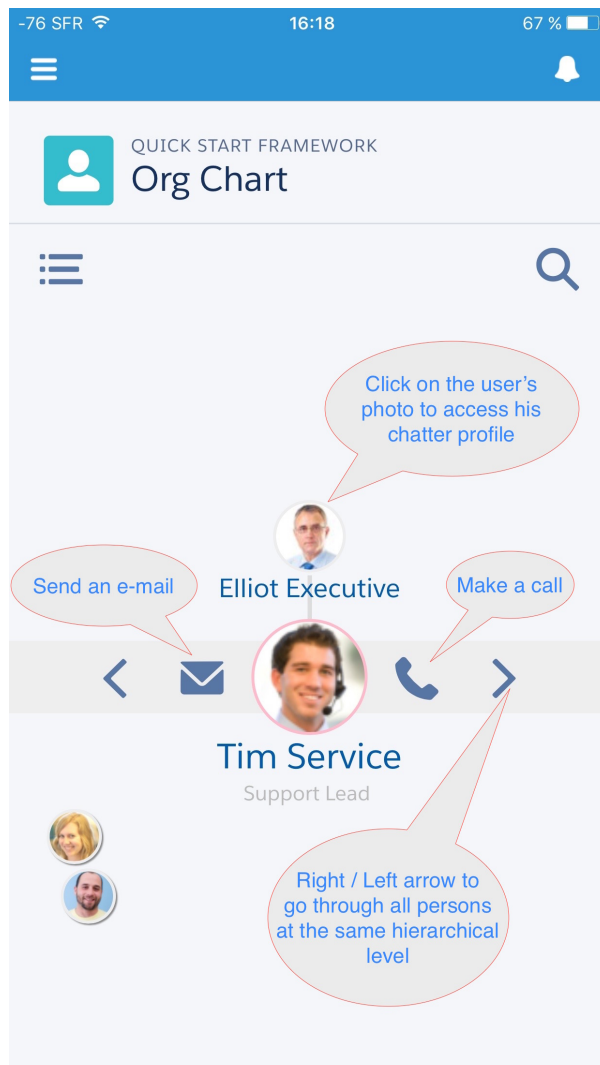


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Actions: Make a call, Send an email, Access user's profile



Behind the scene

Components used in the OrgChart App

The OrgChart App provides the skeleton you can build upon to further customize this application according to your needs. This is also a good example you can use to start learning how to create a mobile application for Salesforce1 mobile app, how Force.com and Lightning Component works.

The following components are used:

- Apex Class
- Lightning Component
- Lightning Tab

For a comprehensive list of the components used by the application; in the package click on the “View Components” button.

Developer’s Environment

Salesforce provide an efficient Cloud based IDE “the developer console” to write Apex Classes and create your Lightning Components. However you can use other IDEs such as Force.com IDE plug-in for Eclipse, Mavens or Visual Studio.

Data Model

The “OrgChart” app is solely based on the users and the hierarchy existing in the organization.

Main Building Block

The OrgChart leverage lightning components usage. The following links will provide you with more insight, please have a look to them.

- <https://developer.salesforce.com/lightning>
- <https://developer.salesforce.com/docs/atlas.en-us.lightning.meta/lightning/>
- <https://resources.docs.salesforce.com/sfdc/pdf/lightning.pdf>

Test Classes

All Apex code must be covered by at least at 75% by test classes in order to be able to run in a production org.

The OrgChart App contains the following test class

- PSE_orgChartCptCtlTest

This class will have to be updated if you decide to tailor the Apex code of OrgChart App.

What's Next

In the future version the following enhancement might be implemented

- A desktop version
- A numerical view of direct report
- A numerical view of indirect report
- Displaying more user's information