

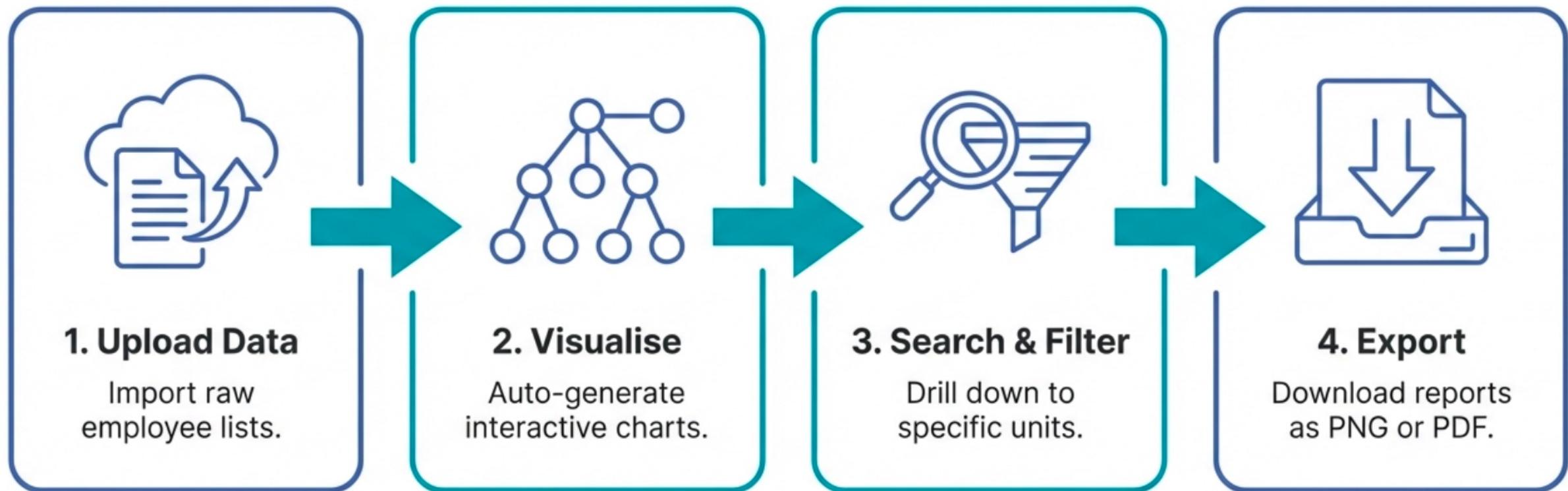


CardX Org Chart: User Guide

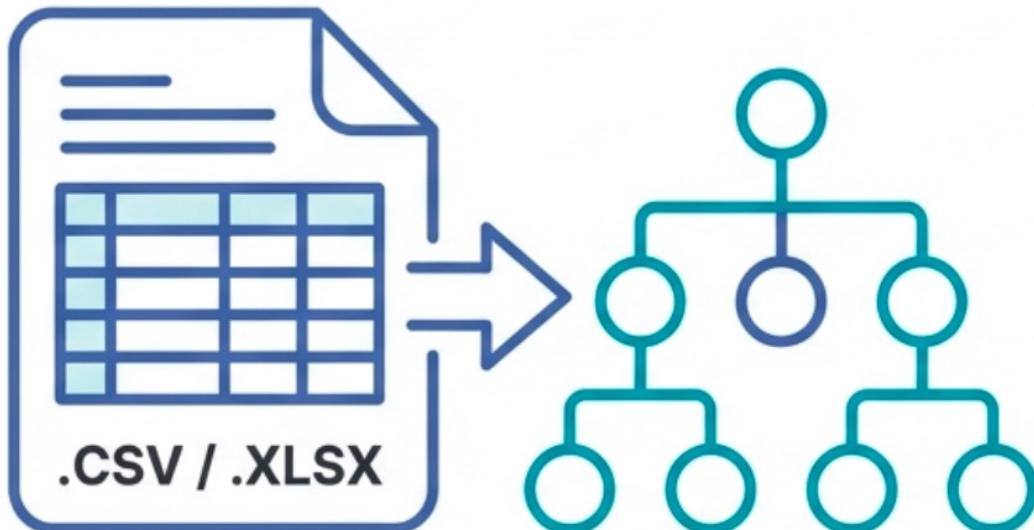
A comprehensive manual for visualizing, searching, and managing organizational structures.

System Capabilities & Workflow

The CardX Org Chart is a dynamic tool designed for viewing employee data, analyzing hierarchies, and generating structural reports.



Step 1: Getting Started



Action:

Launch the program and click the green 'Upload Excel/CSV' button located at the top of the interface.

Supported formats:

Ensure your source file is saved as .csv and .xlsx

Outcome:

Once the upload is successful, the main organizational chart will populate the canvas immediately

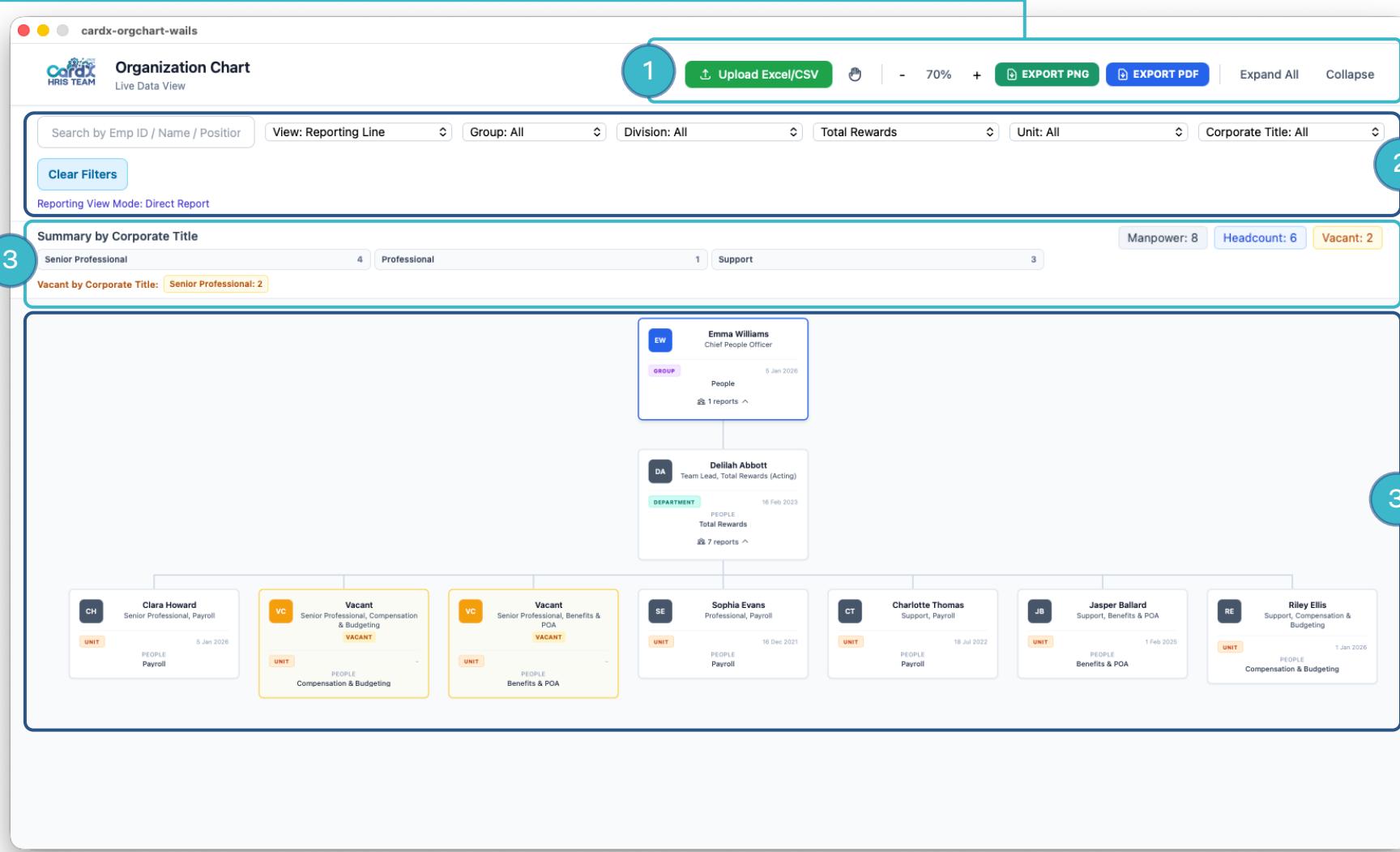


Tip: Ensure your file contains valid column header and data, not just blank rows.

Navigate the Interface

1. Top Control Bar:
Contains file upload, view mode, export and short key expand & Collapse

1



2. Filter & Search Deck: the secondary row for inputting specific queries and selecting hierarchy filters.

2

3. Summary Strip:
The bottom section displaying live analytics (Manpower, Headcount, Vacant)

3

3

4. The Canvas:
The Interactive workspace where the chart is displayed.

Canvas Navigation Controls

Zooming



Use the + and - buttons in the top bar to adjust the visibility percentage.

Panning (The Hand Tool)

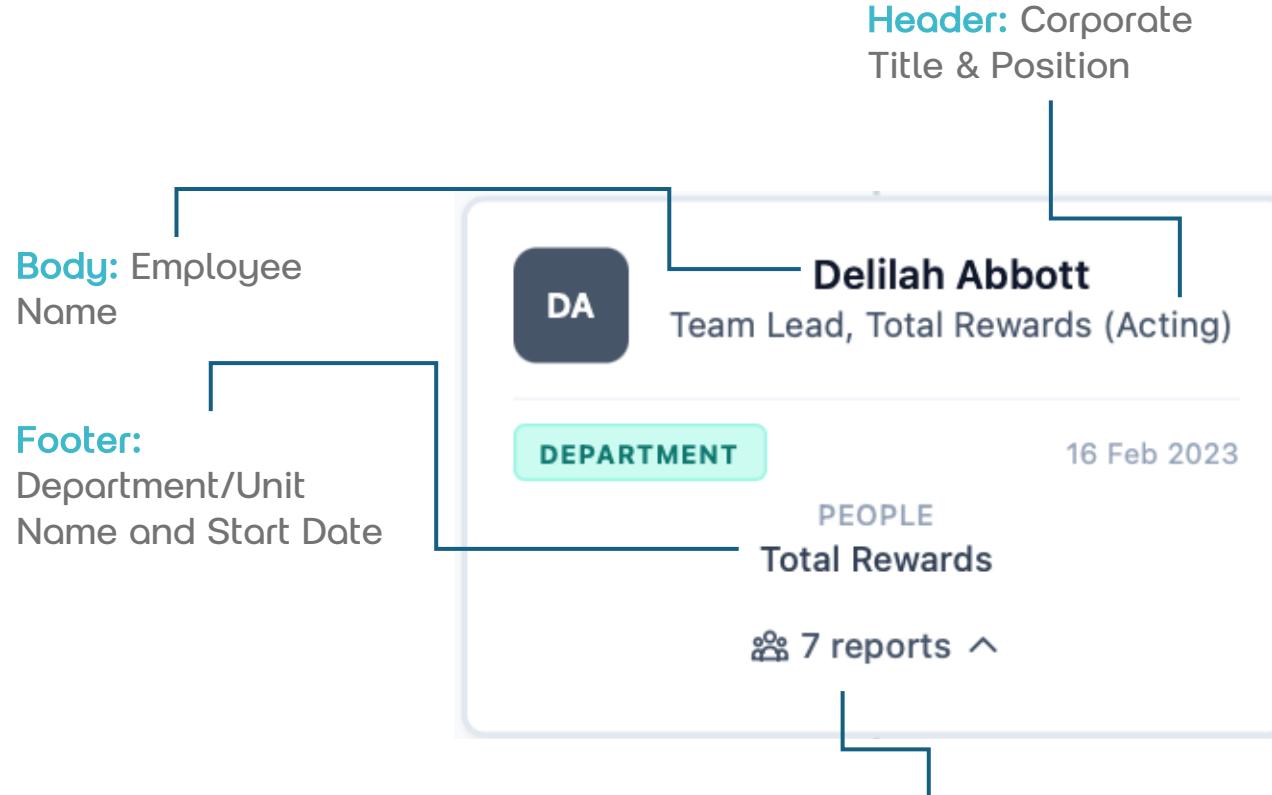


Toggle the Hand Icon to 'On' to drag the canvas. Toggle 'Off' to return to selecting cards

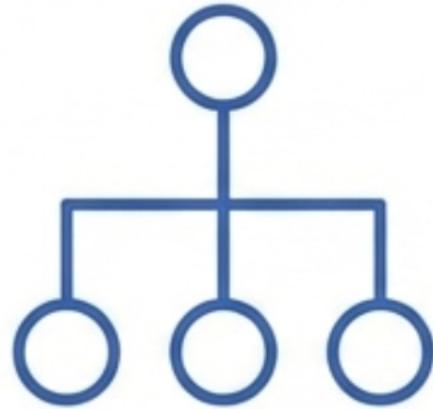
Global View Control

Use 'Expand All' to unfold every node in the organization, or 'Collapse' to retract the view to the top-level hierarchy.

Understanding the Employee Card



Select Your View Mode



Reporting Line

Concept: Who report to whom?

Focus: Direct command chain
(Manager -> subordinate).

Best for: Performance reviews and
team management.



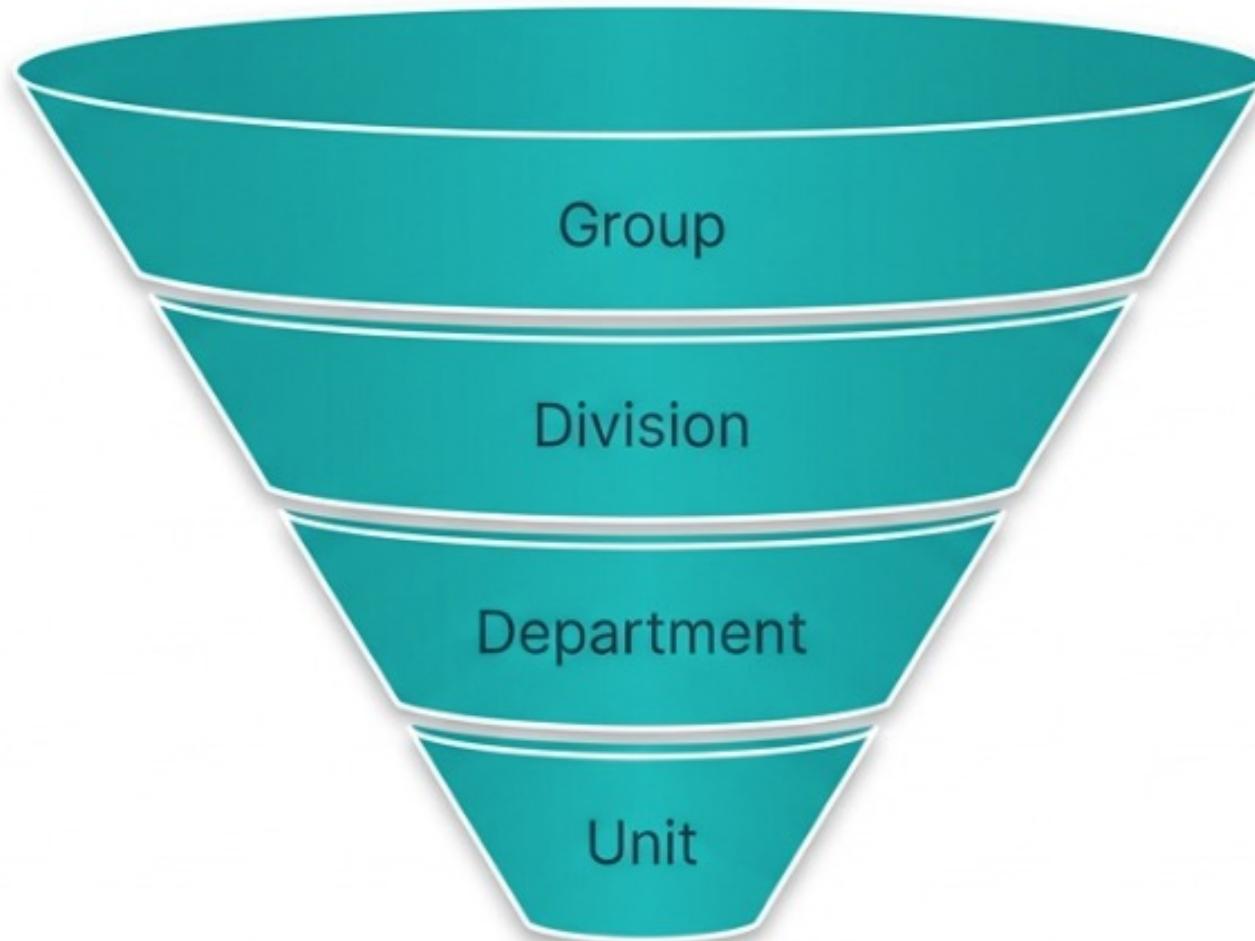
Next Phase Organization Hierarchy

Concept: How is the company built?

Focus: Structural units (Group >
Division > Department > unit).

Best for: Auditing department sizes
and structural planning.

Advance Filtering Logic



The Hierarchy Rule:

Filtering works top-down.
Selecting a 'Group' resets the
choices available for division
and Department.

Independent Filters

'Corporate Title' can be filtered
independently of the structural
locations.

Clear Filters

Use 'Clear Filters' to wipe all
conditions and return to the full
view.

Real-Time Data Summary

Manpower: 40

Headcount: 35

Vacant: 5



Manpower

The total number of positions (filled + empty) fitting the current filter.



Headcount

The number of active employees currently filling those positions.



Vacant

The number of open/unfilled positions



Dynamic Update: these figures recalculate instantly whenever you apply a Search or Filter.

Exporting Reports



- 1. Prepare:** Adjust your Zoom, View Mode, and Filters until the screen shows exactly what you need.
- 2. Select Format:** Click the blue “Export PNG” (for images) or “Export PDF” (for documents) buttons.
- 3. Save:** Name your file and choose a save location on your device.



Important: The button will display ‘PROCESSING...’ while generating. Please wait for the system to finish before clicking again.

Troubleshooting & Best Practices



No Data After Upload?

Fix: Ensure your file is .csv or .xlsx and contain valid column headers, not just data rows.



Can't find an Employees?

Fix: Click 'Clear Filters' first. Previous filters may be hiding the result. Try searching by ID.



Chart is Off-Screen?

Fix: Use the 'Expand All' button or toggle the Hand tool to recenter the view.



Export Failed?

Fix: Try reducing the complexity of the filter (fewer nodes) and ensure you have write-permission for the destination folder.

For system errors not listed here, please contact the CardX HRIS Team.