

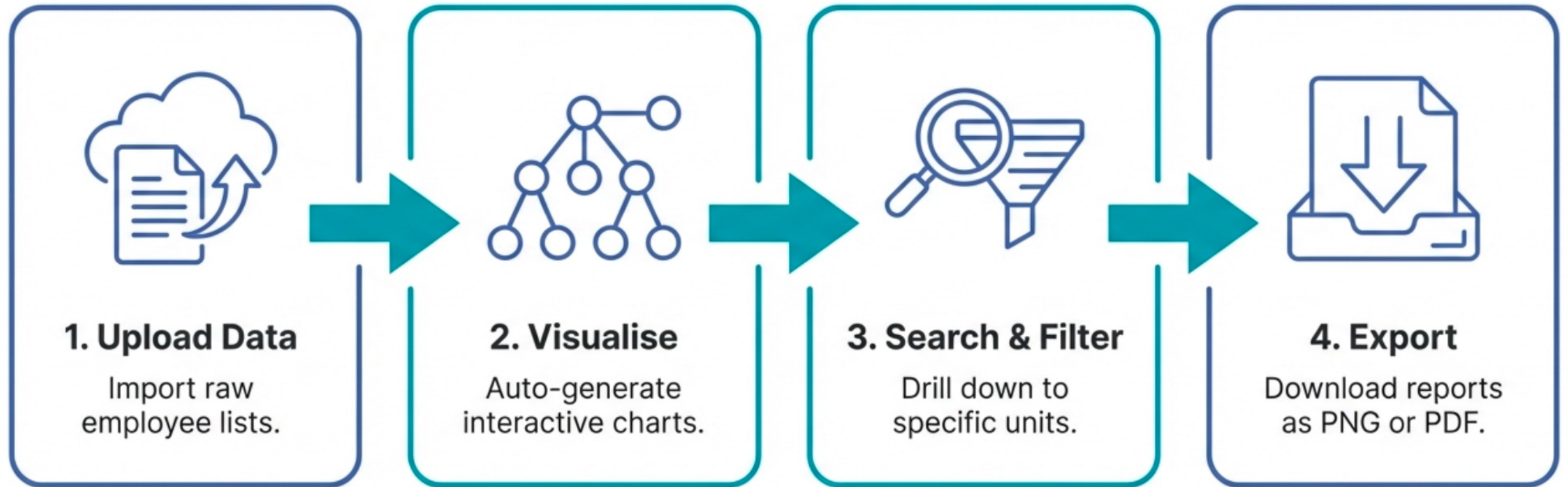


# CardX Org Chart: User Guide

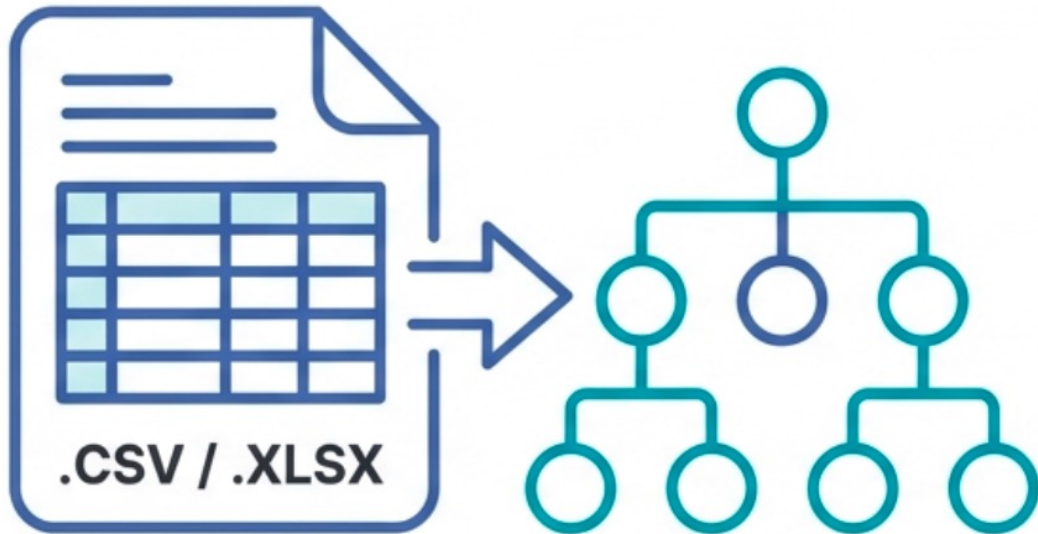
A comprehensive manual for visualizing, searching, and managing organizational structures.

# 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.

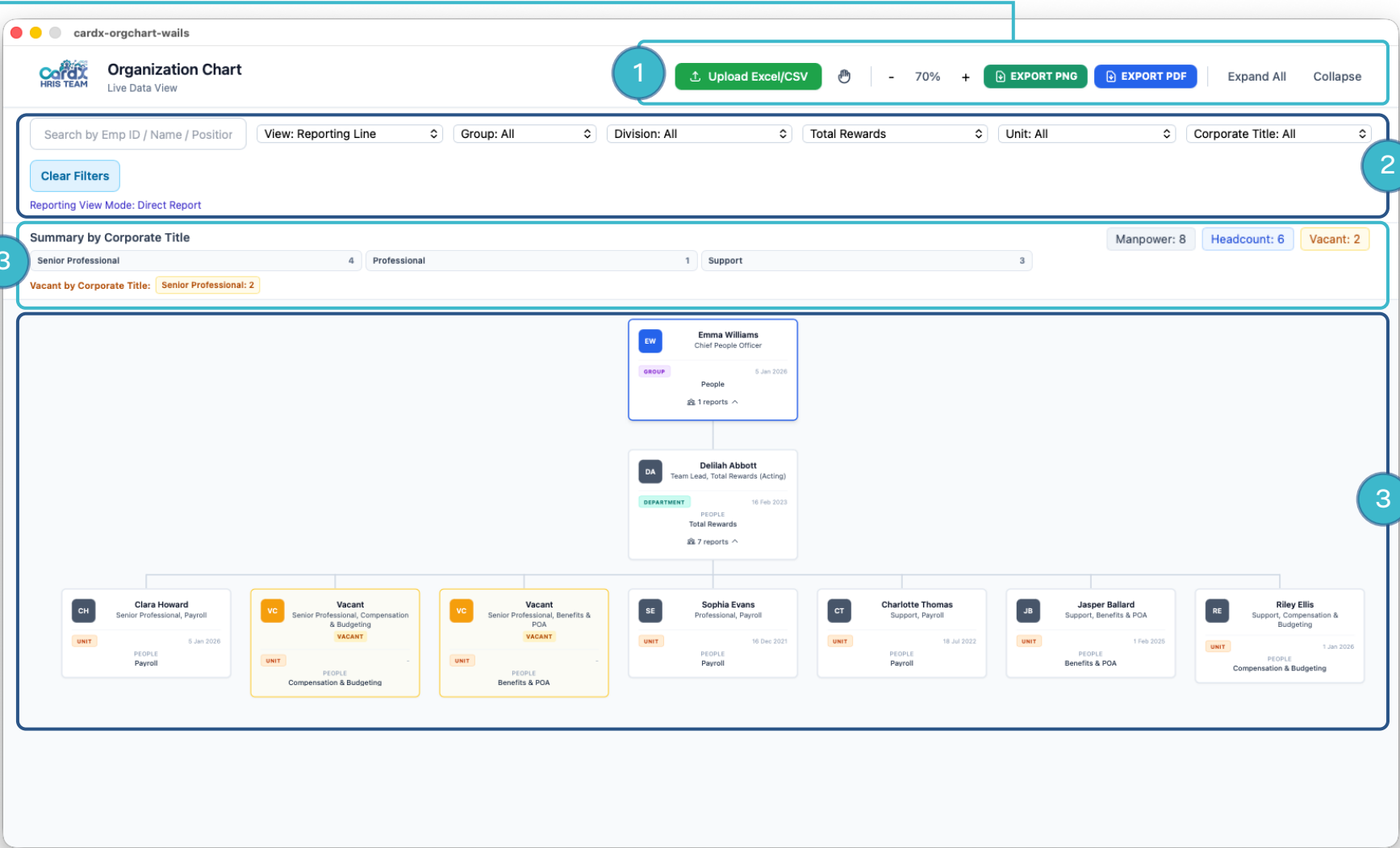
# Navigate the Interface

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

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

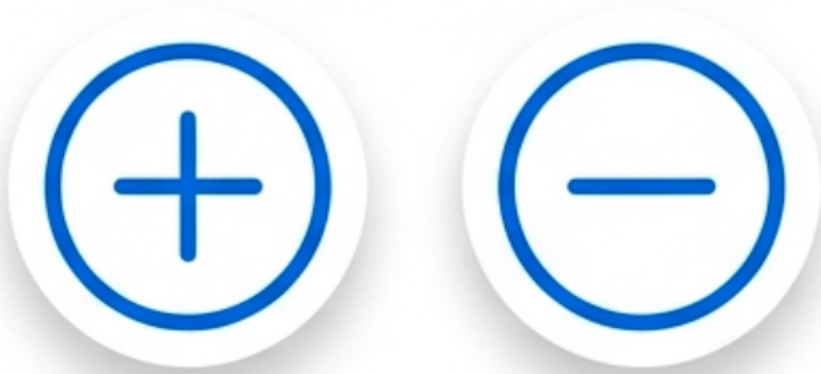
**2. Filter & Search Deck:**  
the secondary row for inputting specific queries and selecting hierarchy filters.

**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)

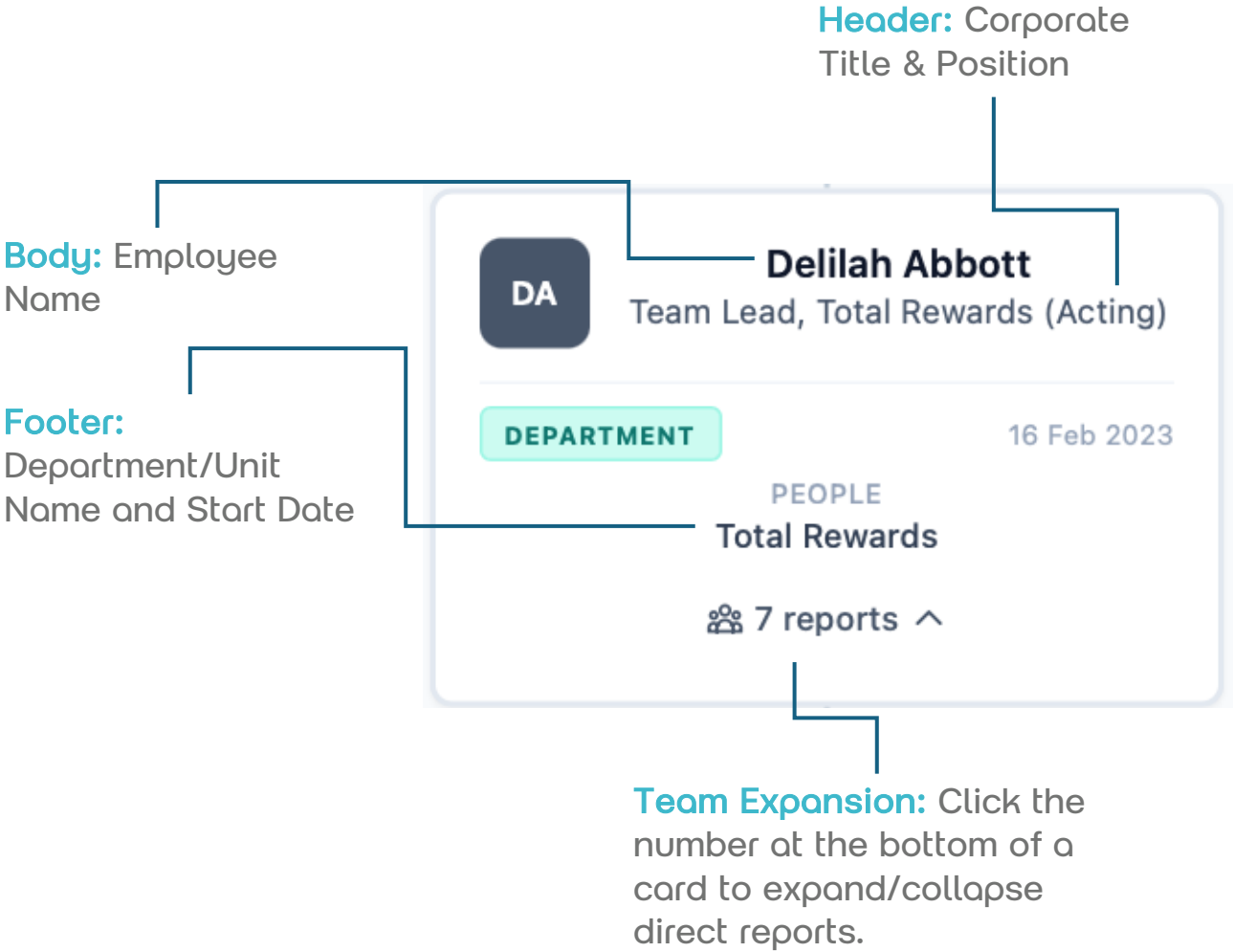


Toggle the Hand Icon to ‘On’ to drag the canvas. Toggle ‘Off’ to return to selecting cards

## Global View Control

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

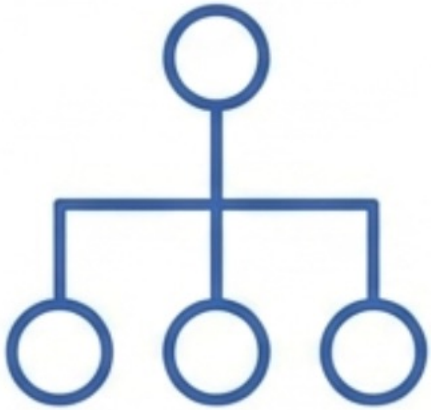
# Understanding the Employee Card



**Status Indicators:** Vacant positions are explicitly labelled 'Vacant'

**Details:** Click anywhere on the card to open a detailed information pane

# Select Your View Mode

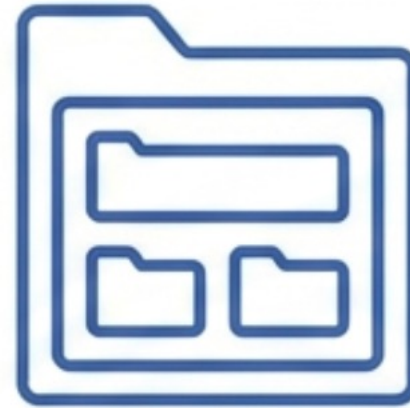


## Reporting Line

**Concept:** Who report to whom?

**Focus:** Direct command chain  
(Manager → subordinate).

**Best for:** Performance reviews and team management.



Next Phase

## Organization Hierarchy

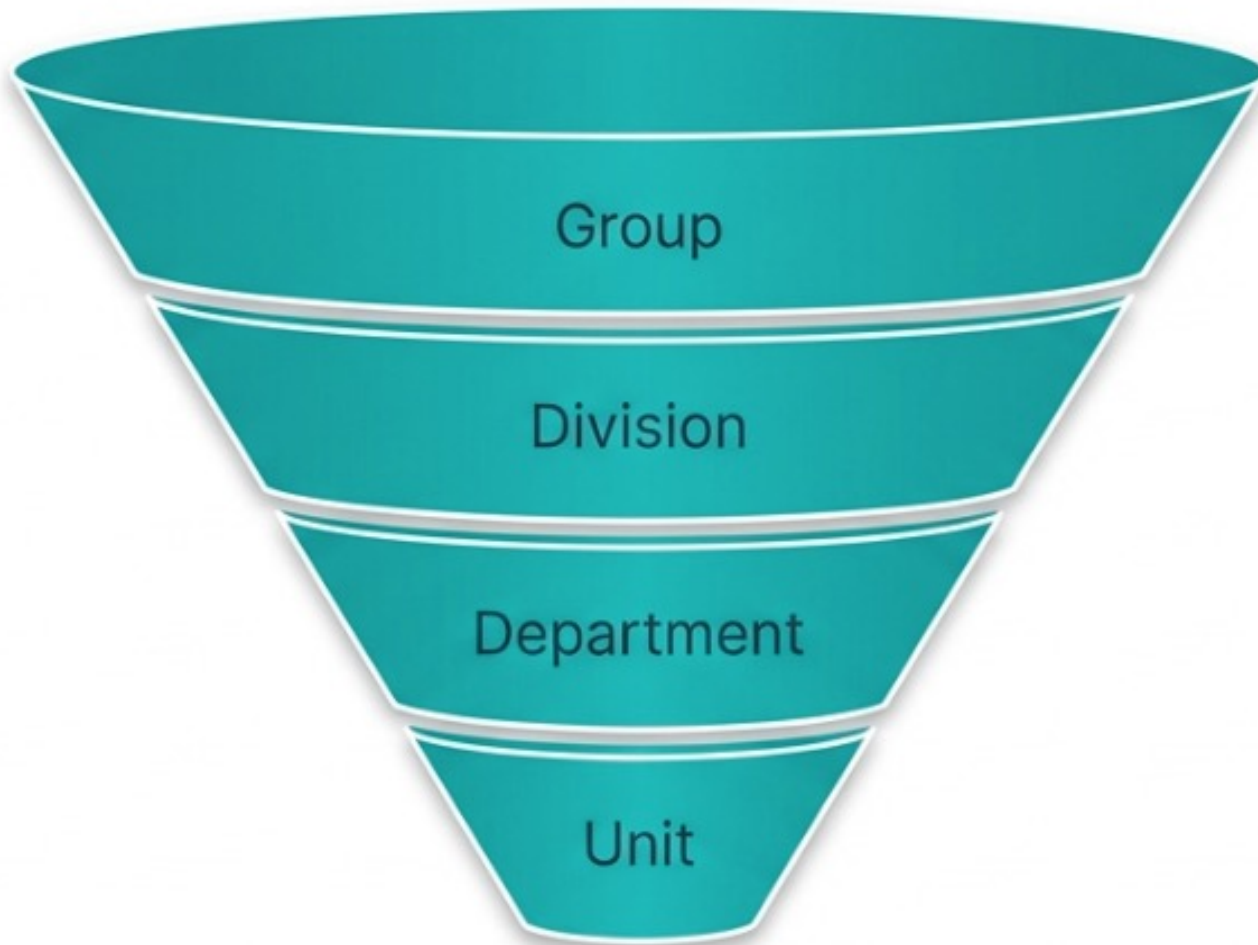
**Concept:** How is the company built?

**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.