



To add items to any of the categories select it from the Administration / Organisation Chart list e.g. Division:

1. Use the Filters or Search Box to find items.
2. Click  to edit or  to delete any items.
3. Click **+ADD NEW** to create a new item.
4. Type in a title.
5. Click **SAVE**.

The screenshot shows the 'Administration / Organisation Chart / Division' page. At the top, there is a navigation bar with 'Home / Administration / Organisation Chart / Division' and a '+ADD NEW' button labeled '3'. Below this is a toolbar with 'EXCEL', 'PDF', 'FILTER', and a search box labeled '1'. The search box contains 'Search...'. Below the search box is a table with two rows: 'Motor Racing' and 'Sailing'. Each row has edit and delete icons, with a '2' next to them. At the bottom, there is a 'Title' input field containing 'Commercial Plumbing' with a '4' next to it. To the right of the input field are 'SAVE', 'DELETE', and 'BACK' buttons, with a '5' next to the 'SAVE' button.

To view the chart navigate to **Administration / Organisation Chart / Chart**.

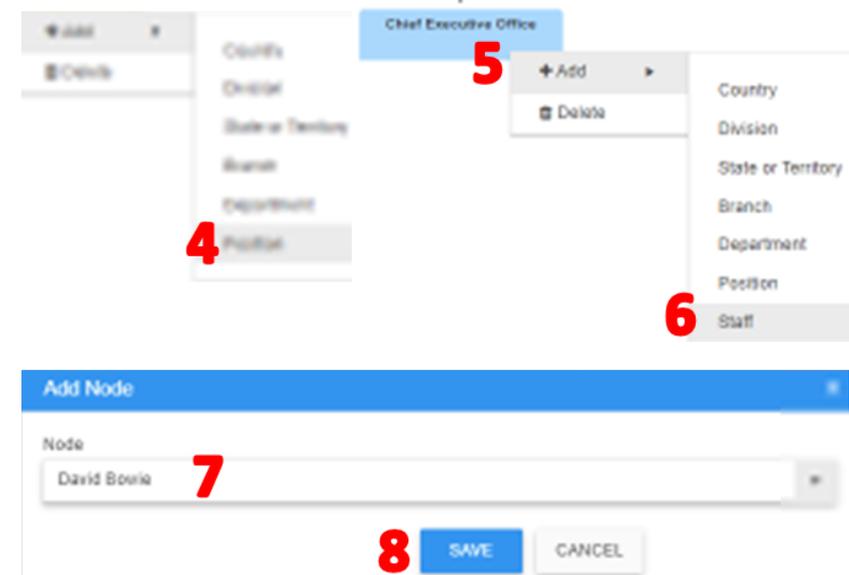
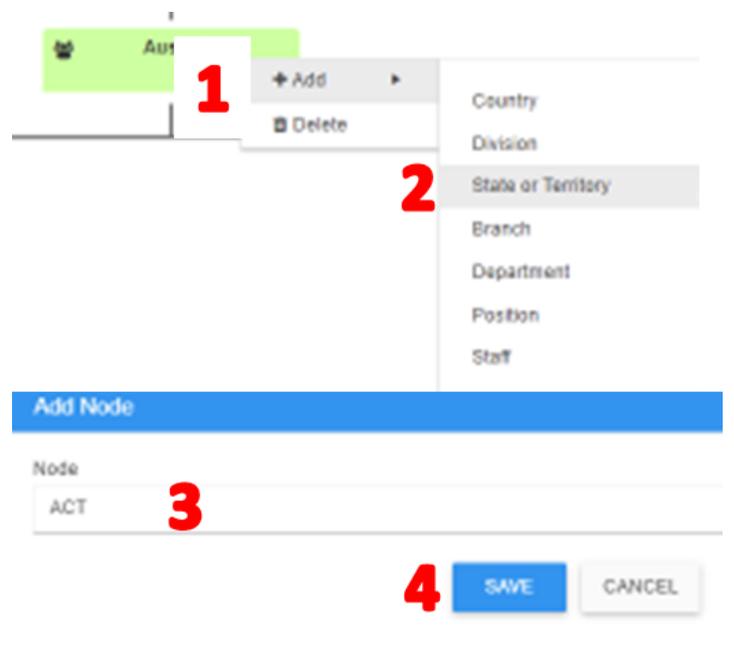
The screenshot shows the 'Administration / Organisation Chart / Chart' page. A dropdown menu is open over the chart, with 'Organisation Chart' highlighted in red. The chart shows a hierarchy starting with 'Cinderalla BPumpkin (Chief Executive Office)' and 'Marilyn Monroe (Chief Support Officer)'. Under 'Cinderalla BPumpkin', there is 'Sales & Marketing', which branches into 'Fred Brown (Office Manager)', 'Cinderalla BPumpkin (Apprentice)', and 'Cinderalla BPumpkin (Chief Executive Office)'. Under 'Marilyn Monroe', there is 'Motor Racing', which branches into 'Head Office - Auckland', 'Customer Support', and 'Accounts De...'. 'Head Office - Auckland' branches into 'David AASign (Chief Information Officer)', 'David Bowie (Administration Manager)', 'Rod Jensen (Administration Manager)', and 'David AAS (Sales Mana...'. 'Customer Support' branches into 'David AASign (Chief Information Officer)', 'David Bowie (Administration Manager)', and 'Rod Jensen (Administration Manager)'. 'Accounts De...' branches into 'David AAS (Sales Mana...'. The chart also shows 'Fred Brown (Office Manager)', 'Cinderalla BPumpkin (Apprentice)', and 'Cinderalla BPumpkin (Chief Executive Office)' as 'Fire & Emergency Warden(s) Health and Safety Committee Members'. 'David AASign (Chief Information Officer)' is a 'Return To Work Coordinator Owner / Director'. 'David Bowie (Administration Manager)' is a 'Maintenance Manager Owner / Director'. 'Rod Jensen (Administration Manager)' is a 'Health and Safety Representative (HSR) First Aider'. 'David AAS (Sales Mana...)' is a 'Return To Work C... Owner / Dire...'. There is an 'Export' button in the top right corner.

Your Company Name will be displayed at the top.
To start building your chart right click on the box:

1. Select +ADD.
2. Select the type of item to add.
3. Choose from the list.
4. Click **SAVE**.

This will add an item below the one you have selected.

To add items on the same level you will need to click on the level above e.g. if you want to add another country right click on SMDemo and select add country.



To add staff

5. First click +Add & select Position.
6. Click on the Position added & select Staff
7. Choose from the list of staff.
8. Click **SAVE**.

You can also collapse and expand sections of the chart by hovering over the field and clicking the green arrows on the four sides.

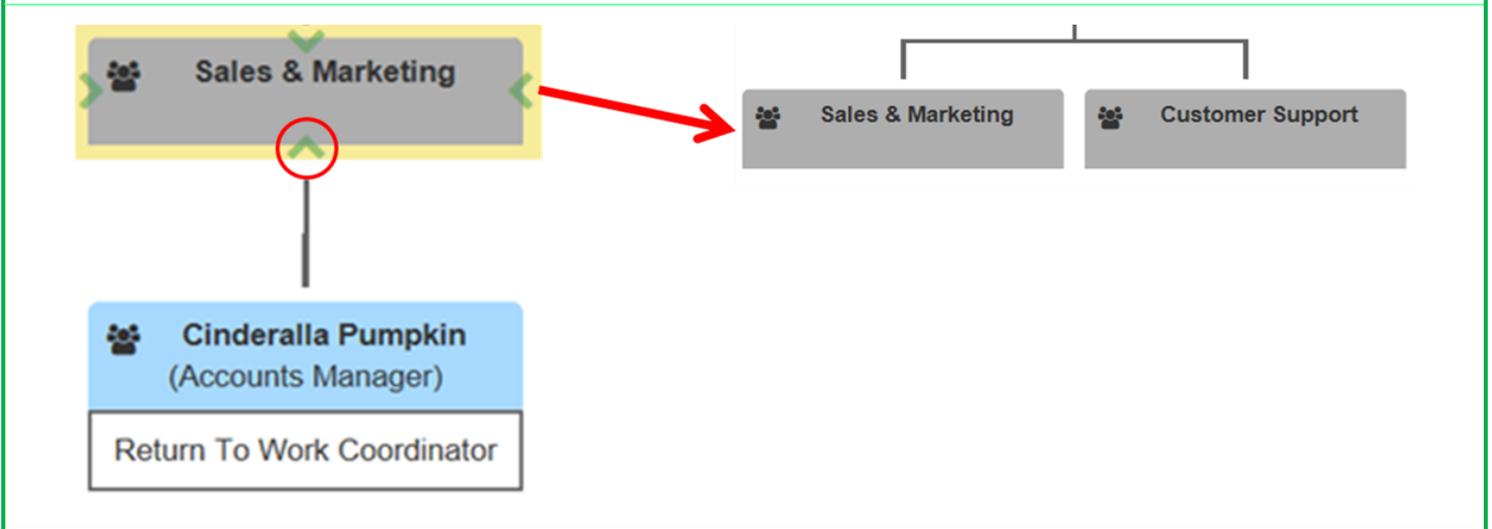
The inward facing arrows mean you can collapse data above, below or from left and right.



The outward facing arrows mean you can expand data, below, left or right.



In the example below we clicked the bottom arrow which collapsed the Sales & Marketing Department. You can make them reappear by clicking the arrow again.



NOTES:

- You can also export your Organisation Chart to a PDF for printing by clicking on the Export button top right side of the screen.
- You can use the scroll button on your mouse to zoom in or out on the chart. Use the Refresh Button to reset.

