

# Simply Personnel Personnel Manager

## A Guide to Using the Organisation Chart

## Simply Personnel: Organisation Chart

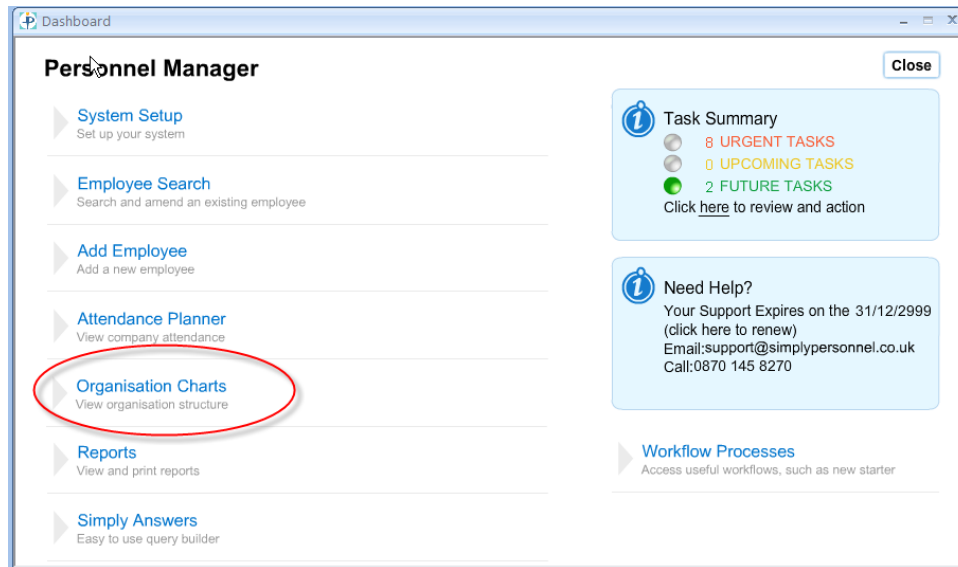
This document provides step-by-step guide for users to give an easy understanding to the organisation chart.

If at any time you need help or just need some questions answered please use our on-line helpdesk at [www.simplypersonnel.co.uk](http://www.simplypersonnel.co.uk) where you will find comprehensive articles and an option to open a support ticket.

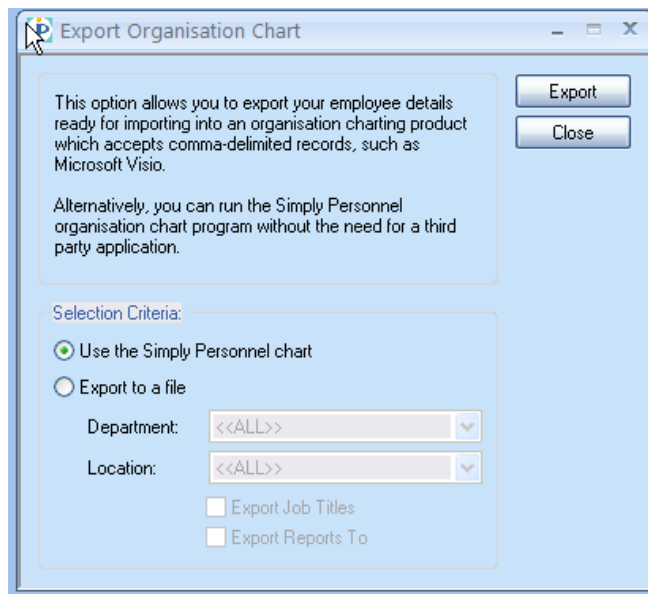
Thank you

The Simply Personnel Team.

To access the organisation chart select the tab from the main dash board.



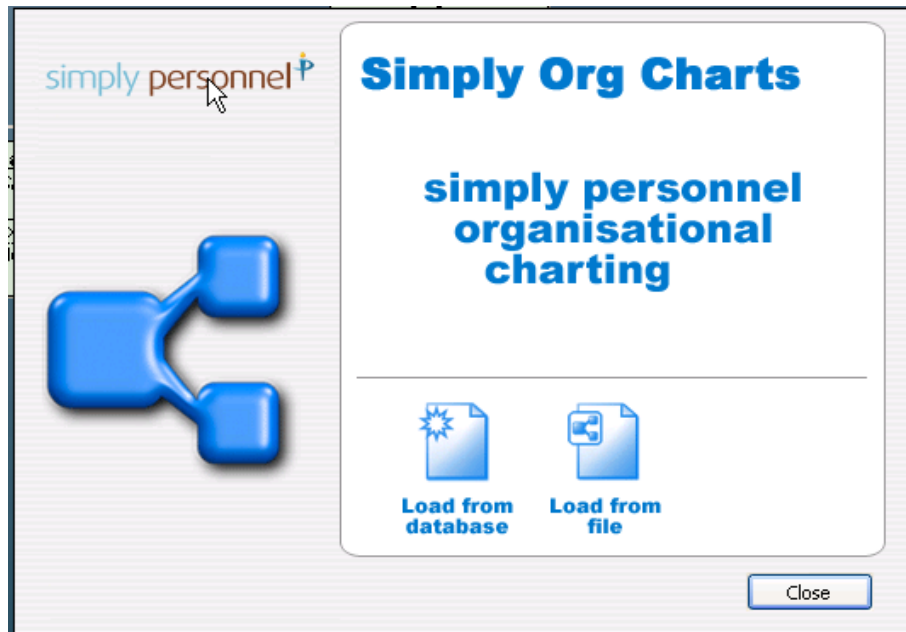
This will open up the following window:



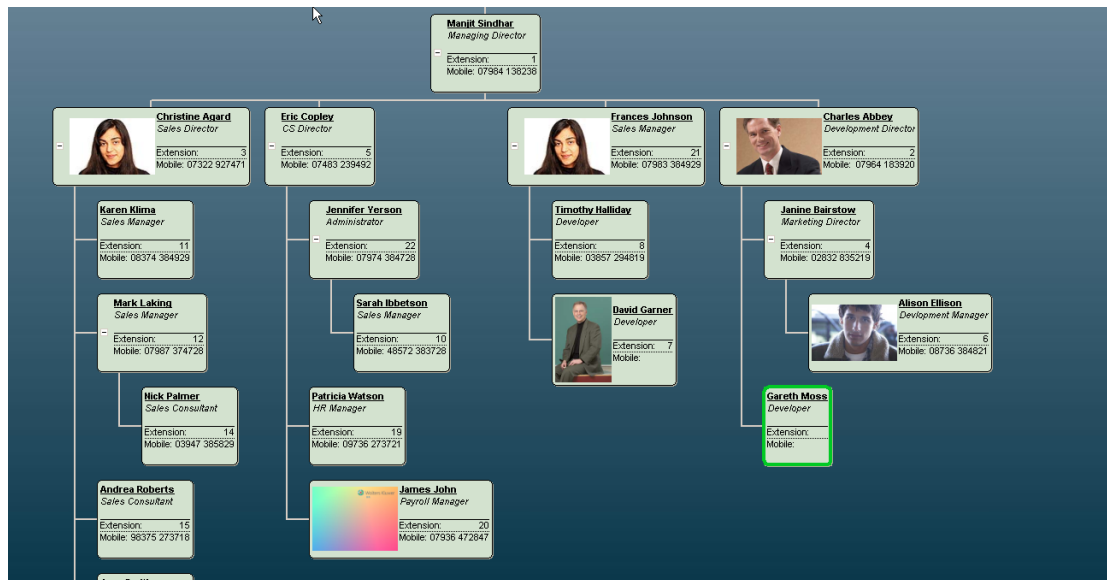
You will have two options, Export to file this will allow you to export your employee details into an existing organisation charting product which will accept comma-delimited records i.e Microsoft Visio, or Use the Simply Personnel chart which will be show in the rest if this guide.

Select (Use the Simply Personnel chart) and then click on the 'Export' button at the top of the window.

This will open up a separate programme were you can produce you organisation chart in real time.

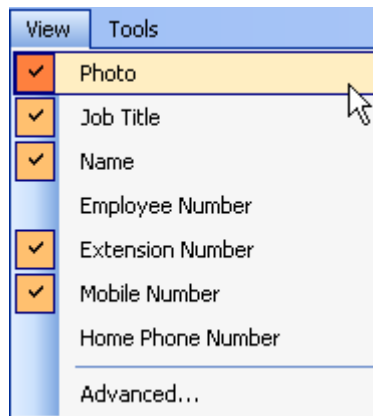


If this is the first time you are using this tool click on the 'load from database' button and this will load an organisation chart based on who reports to whom in your personnel manager.



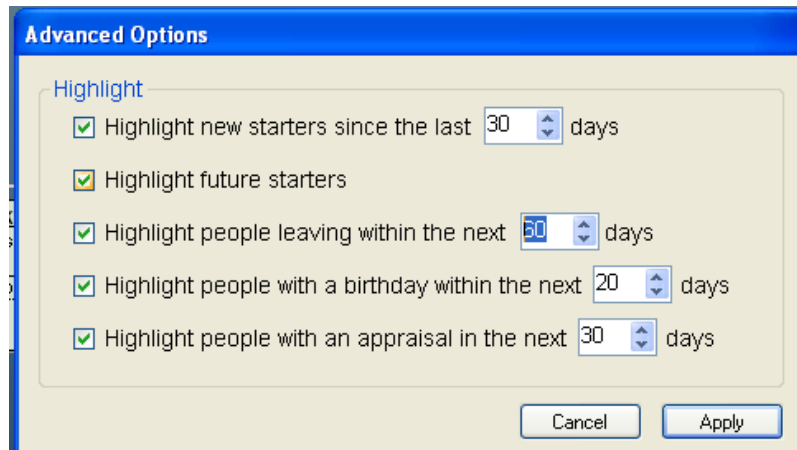
If you have set up all of your employee jobs and who they report to then your organisation chart will reflect this.

You can decide what you see in the boxes by selecting the view menu from the top of the screen.



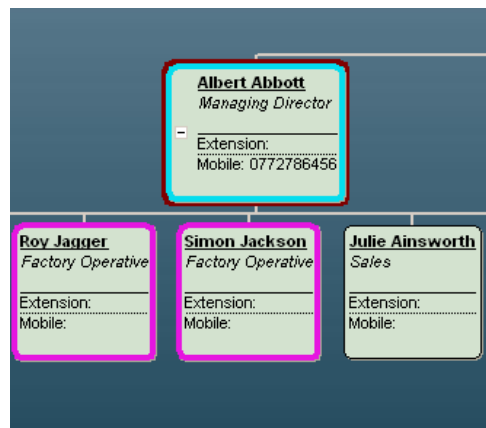
Click on the option that you wish to show for each employee on the organisation chart.

At the bottom of this menu there is an advanced option, select this and another window will appear.



You can decide whether these option are shown by ticking the boxes and you can amend the number of days that this will show by adjusting the number, when you are happy with you selection click on 'Apply'.

The top right of the screen will give a key to the colours that are used. This will put a ring round all employees that fall into these categories.

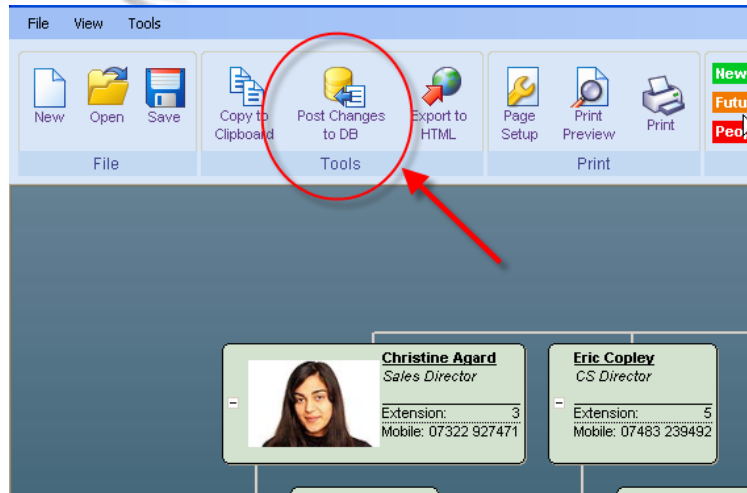


### Amending your organisation chart;

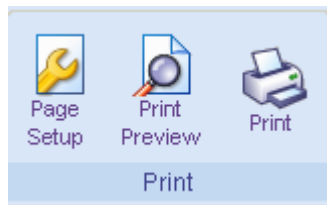
If you need to change the lay out of your organisation or you need to have some employees report to a different member of staff you can do this by simply clicking on the box of the employee you want to move and drag them on to the person that they will be reporting to.

Any changes you make to this organisation chart have not yet changed your personnel manager data base.

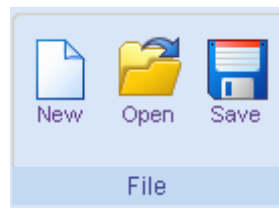
If you want to transfer these changes through to the database simply click 'Post Changes to DB' as below,



You have several options via the tool bar at the top of the screen, you can print off your organisation chart and amend the page layout,



You can save your amended charts and open them back up for reference or you can create a new chart,



You can also copy your chart to clipboard or export it to HTML. If you would like to reflect the changes that you have made in your organisation chart to show in your personnel manager then select Post Changes to DB this will amend the records of the employees that you have moved.

