

Organizational Chart Software Buyer's Guide

Prepared by OfficeWork Software, LLC

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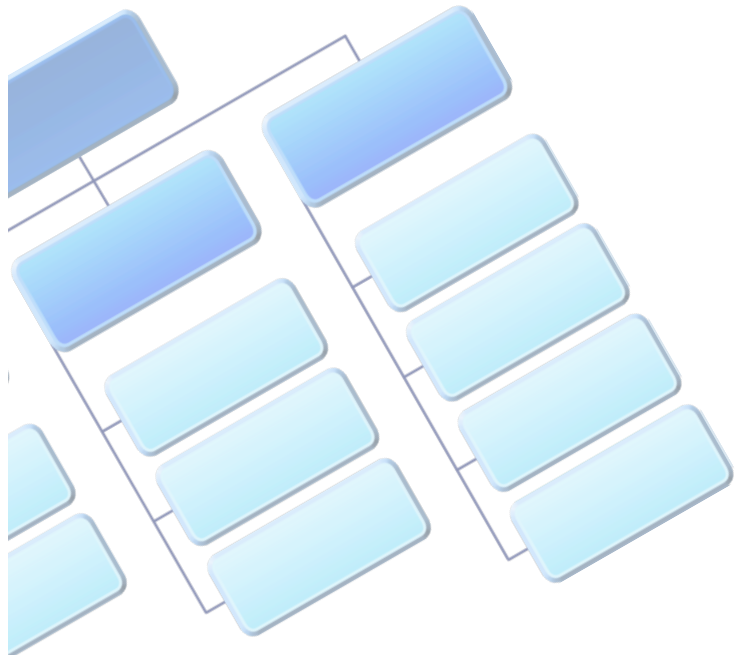
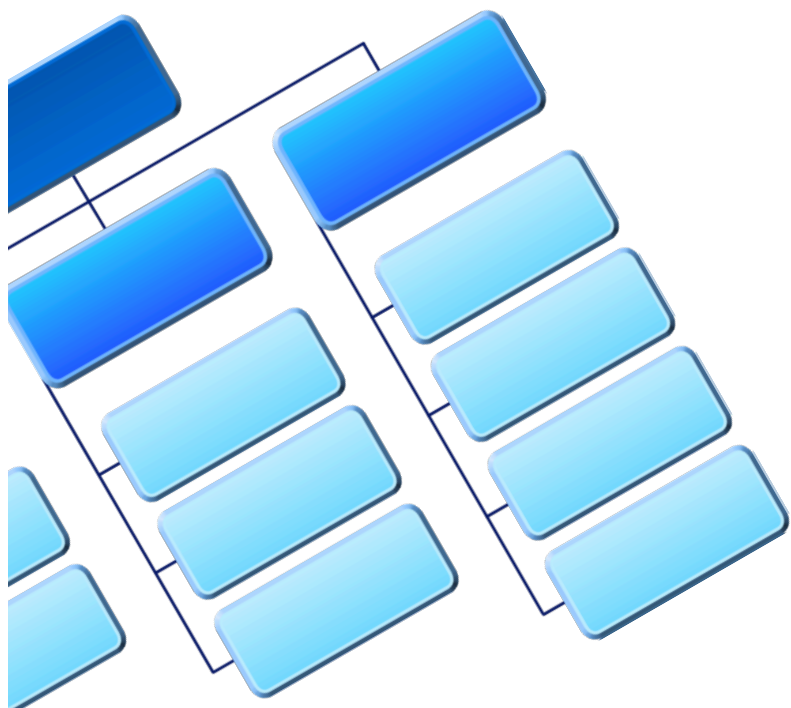


Table of Contents

Introduction.....	2
Automating Your Org Charts.....	4
Professional Quality Org Charts.....	5
Advanced Org Charting.....	7
Creating, Sharing and Publishing Org Charts	8
Collaboration & Access Control	9
IT Considerations	10
Implementation & Support Services.....	10
Conclusion	11
About OfficeWork Software	12

Introduction

The goal of this document is to help you find the right tools to help you track as well as plan the workforce change and growth of your organization. It is designed as a checklist to help you assess your workforce situation, then identify and prioritize your needs. Doing so will help drive the buying decision for org charting software.

To help you with this process, we've gone ahead and done the dirty work. We've spoken to hundreds of HR Professionals, IT Professionals, project managers and executives about their organizational charting needs. We then aggregated everyone's comments and suggestions requirements in order to create this white paper.

Whether you're seeking a solution as an entrepreneur, for a small business team, or to track the workforce of a multi-tiered, international corporation, we've got you covered. Simply use the checkboxes in this guide to mark requirements that apply to your organization; this will help remove the guesswork in finding the right solution for you.

Asking the Right Questions

The key to discovering the right software solutions for your business is in asking the right questions before jumping into purchase mode. Let's first consider the most obvious question you may have already asked yourself . . .

Do I really need software for charting my organization's workforce?

It's hard to put a value on a professional-quality, accurate organizational chart. Yet the time required to create org charts has a **real cost** associated with it.



With generic drawing tools such as Gliffy, Visio and PowerPoint, the amount of time it takes to create an org chart manually is directly proportional to the number of people you need to chart. The hours used to create and maintain org charts take time away from other business critical tasks.

Can I Justify Purchasing An Org Charting Solution?

Likely the next logical question you’ve formulated is of a financial nature . . . is there money in the budget to justify a software purchase? Org charting software can cut the time required by a factor of 10 times or more. With this in mind, use the table below to answer the question as it pertains to your business organization.

How Often Do You Update Your Organization’s Charts?					
(How many workers?)	Annually	Quarterly	Monthly	Weekly	Daily
0 - 100	No	No	Yes	Yes	Yes
100 - 1500	No	Yes	Yes	Yes	Yes
> 1500	Yes	Yes	Yes	Yes	Yes

Automating Your Org Charts

Any org chart software worth its salt can automatically create org charts from external data. If you have access to employee data through an HR system, payroll system or even an Excel spreadsheet, you can automatically create org charts. Automating org charts (verses manually creating org charts) saves both time and money and alone can justify the purchase of organizational charting software. If you want to create charts manually, skip to the next section; otherwise, use the following checklist to capture your requirements.

Large Data Sets – Org Charts can contain thousands of boxes. Not all tools can handle large data sets.

Excel (or CSV file) Import - Create org charts from an Excel or CSV (comma separated values) file.

Direct Query - Import data directly from HR Systems. These allow you to skip export/import of spreadsheets each time you need to update or create a chart.

Drop Box - If direct query is not available, does the vendor provide a (FTP) drop box where you can push your HR data?

Automatic Page Breaks – Charting hundred or evens thousands of employees requires that a chart be broken up into multiple pages.

Automatic Data Refresh - Automatically update charts by re-querying source data to reflect changes (e.g. supervisor changes, title changes, exits, etc.). You should be able to update your charts with a single click of the mouse.

Scheduled Data Refresh - Automatically update charts on a scheduled basis (daily, weekly, monthly). This ensures that your org charts are never out of date and reduces the load on HR.

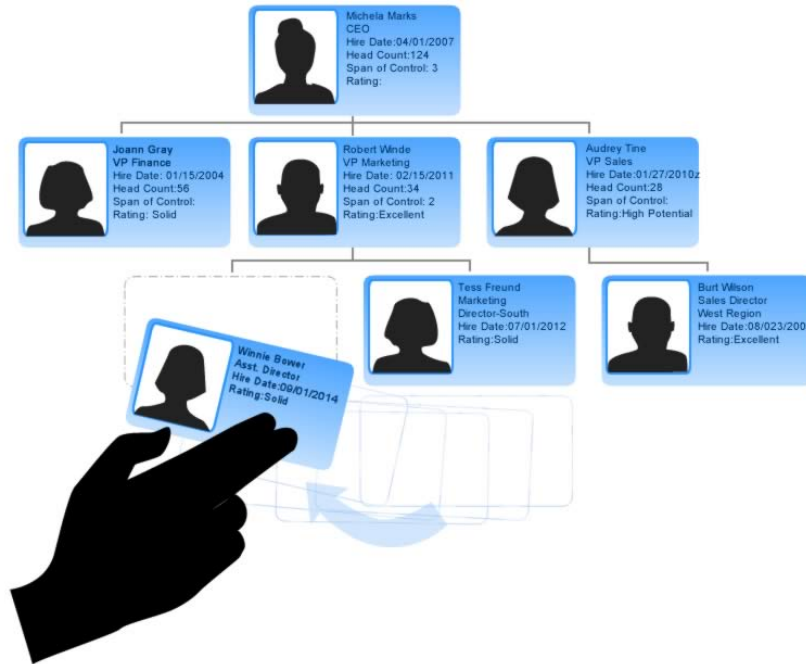
Employee Photos – If you need to include employee photos in your org chart boxes, make sure that photos are automatically updated when you perform a ‘data refresh’ on a chart.

Data Driven Formatting (Conditional Formats) – When employee records are updated, moved or added, box formats should automatically update based



on data driven rules. For example, vacant positions can be automatically colored for easy identification.

Manual Updates – Allow HR to make manual updates as needed (remove, add, update or move boxes). HR needs to be able to provide accurate org charts even if there is a backlog in updating the core HR data. For example, a new employee needs to be included in the org chart even if their starting date is “next week.”



Professional Quality Org Charts

The quality of your org charts reflects directly on you. You should never have to make excuses; you should be able to generate crisp, clean, professional-quality org charts that meet your exact presentation requirements.

Make sure to consider the following as you evaluate different solutions:

Chart Customization – You should have full control of presentation of each box in your chart. You should be able to control which fields are



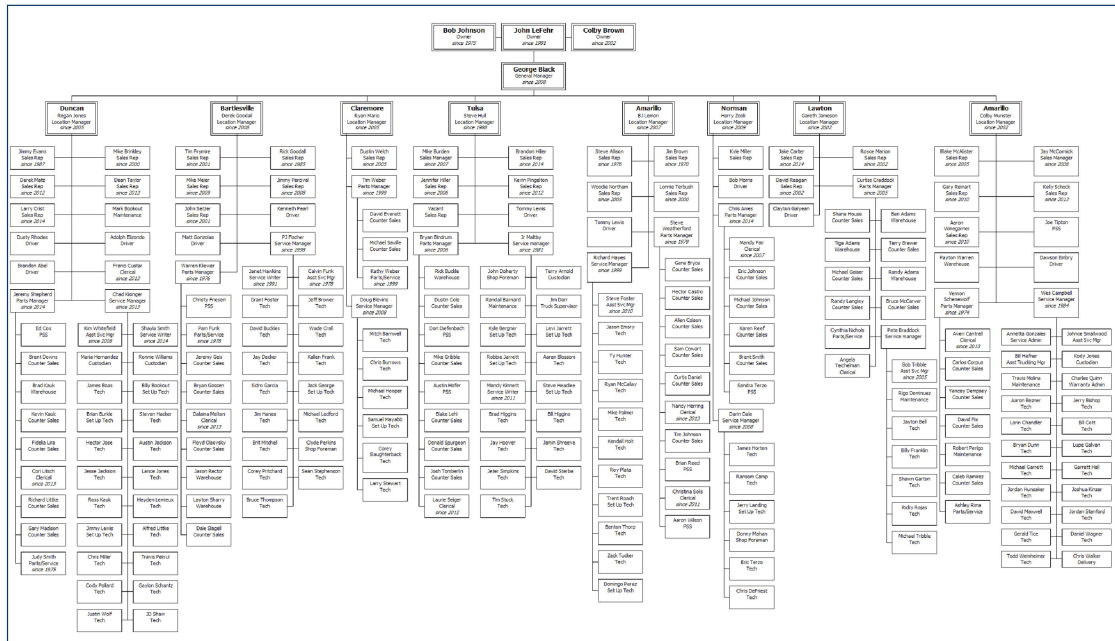
shown in each box (name, title, email, etc.), and you should be able to control presentation parameters including fonts, colors, shadows, borders and box shape.

Automatic box sizing – Boxes should automatically resize and text should automatically wrap to accommodate for different length names and titles.

Automatic page layout – Connecting lines should be automatically repositioned as boxes are added, removed, moved or updated. Connecting lines should never cross each other or overlap boxes.

Master Page Support – Each page of an org chart may need to include elements such as a corporate logo, page numbers, legends and text labels.

Dense Charts – Org Charts can often exceed 50 boxes per page. Tools such as PowerPoint and Visio don't readily handle dense charts.



Advanced Org Charting

Your org charts need to reflect the actual structure of your organization. There are many special cases to consider with respect to accurately representing your organization. Generic drawing tools typically don't include advanced org-charting features.

Select the all that apply to your organization:

Assistant Styles – Most organizations want to differentiate assistants from other direct reports.

High Span of Control – Software must be able to handle managers with a large number (>16) of direct reports.

Co-Managers – Two or more people manage a shared group.

Legends – Legends are often used to explain color-coding or iconography in an org chart.

Images & Text Labels – Images & Text Labels are used to provide additional details about chart (for example, an effective date).

Dotted-line Reports (Matrix Reporting Relationships) – A person fills two or more positions within an organization.

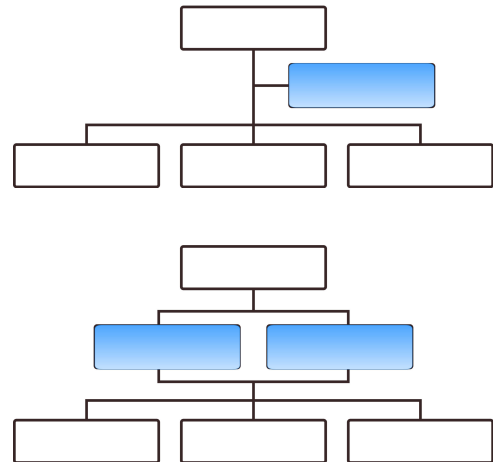
Dynamic Calculations – Dynamic calculations can be used to show various headcounts (e.g. number of contract employees) or sums (e.g. budget totals or full time equivalent totals). These calculations should automatically update as the chart is modified.

Leveling – Direct reports to a manager are shown on different levels (for example, a director is shown at a lower level than a vice president).

Tables in Boxes – Complex boxes showing a number of data points and metrics within a single box.

Employee Profiles – Is there any easy way to access fields (e.g. Location, Email, Phone, Business Unit) that are not displayed in the chart?

Search – It can be difficult to find someone in a large chart. Robust search functionality makes it easier to work with large charts.

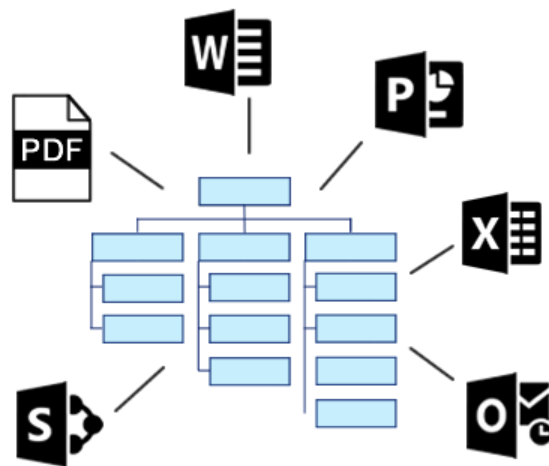


Creating, Sharing and Publishing Org Charts

What good is an org chart if you can't easily share it with your team, your manager, executives, board members or even your entire organization? Also, end users often need to create their org charts (or modify existing charts) for presentations, for project teams or even for workforce planning.

Make sure to consider the following requirements:

- Custom Charts** – Can end users create and customize their own org charts? An example would be a project team or a future scenario.
- Snapshots** – Can end users save a snapshot of a current chart then use it to create a workforce plan or custom org charts?
- PDF output** – Can the tool generate a PDF book that you can print, email or post on the web?



- PDF quality** – Not all PDFs are the same. Make sure the charts look crisp and clean – especially when printed. Also, make sure you can search and navigate PDF files easily.
- PowerPoint and Word** – Can charts be easily included in a PowerPoint presentation or Word Document?
- Excel** – Can you export chart data to Excel?
- Web Access** – Can charts easily be accessed via the web?
- Email Sharing** – Can you email a password protected link to a colleague that allows them to view your chart?

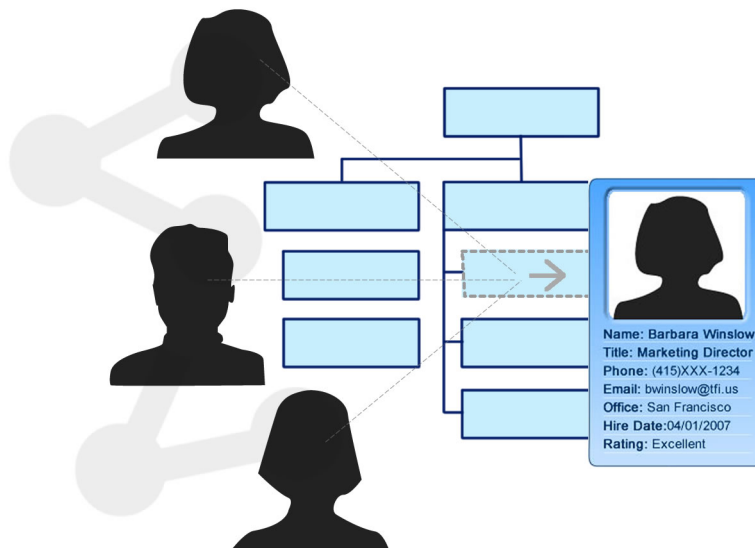
Collaboration & Access Control



Whatever solution you choose it should be easy to collaborate with your co-workers. Also if you have charts containing sensitive information, you will need to control who has access to those charts.

Consider the following requirements:

User Management – Can multiple users access the same account to collaborate on creating charts and workforce plans?



Read only Access – Can you grant read only access to charts so that your colleagues can view, search, print and publish charts?

Shared Storage – Does the system provide shared storage so that you never have to worry about who has the latest version of a chart? HR may need some private folders that aren't available to the population as a whole.

Field Level Security – Within a chart can you control access to privileged information? For example, a manager may be able to see compensation information for their subordinates but not for their peers or supervisors.

IT Considerations



IT professionals have to consider both the initial and ongoing cost of deploying any organizational charting solution.

- Installation** – Does the software need to be installed on each person’s computer? Web based solutions are much easier to deploy to a large group of people because they don’t require installation.
- Browser Plugins** – Does the product require browser plugins like Silverlight or Flash? Optimally, browser plugins should be avoided as they can generate stability, security and support issues.
- Macs and PCs** – Does the product work in your environment? For example, some people use Macs and some people use PCs. Can someone easily use the product from home?
- Upgrades** – If software is installed on the end user’s computer, how are upgrades and patches handled? Are upgrades automatic?
- Portal Integration** – For the general population, can dynamic org charts or PDF org chart be embedded in your corporate portal (for example, a SharePoint page)?
- Single Sign On** – Can you leverage your existing Single Sign On infrastructure (for example, SAML) to allow users to log into the system?

Implementation & Support Services



There may be some effort associated with the initial implementation. Make sure that whatever vendor you choose is able to provide training, support and implementation services as needed.

- Configuration** – How much effort is the product to configure? Does it take days or weeks? Is implementation included or does it cost extra?
- Training** – Does the vendor provide training services? Is training included with the purchase? What is the cost of training classes?
- Customization** – Is the vendor willing to customize the product if needed?

- Telephone Support** – Is telephone support available? What hours is the support desk staffed?
- Email Support** – What level of support is included? What is the turnaround for email support?
- “How to” Videos** – Are videos available to help with “how to” questions?

Conclusion

Knowing first whether your work situation demands the services that org chart software can provide, is the key to finding the right tools to help you maintain and grow your organization. We designed this document to be a simple tool that can help you make that decision. If you find that org chart software should definitely be a part of your business’s growth plan, then it’s likely you have well-defined organizational goals and a solid understanding of your workforce makeup. The checklist format hopefully helped you to identify and prioritize your needs, providing you with an “org-chart software requirements list” which will help you make the right purchasing decision for your business.

About OfficeWork Software

OfficeWork Software, a longtime leader and innovator in the Org Chart software industry, helps organizations solve their workforce organizational charting and visualizations needs. Our mission is to ensure our client's success by providing information technology that enables their ability to engage the right people in the right place at the right time.

By using our OrgChart organizational charting software and advisory services, businesses can gain insights into improving their workforce efficiency.

To find out more about our products and services contact us or visit our website:

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