# OrgChart Now
# Partner API Requirements

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## What is OrgChart Now?

OrgChart Now is a cloud based solution for creating and maintaining organizational charts and workforce plans. OrgChart Now is compatible with most modern web browsers and it works on both the Mac and PC. OrgChart Now is 100% HTML5 so it does not require any browser plugins.

HRIS and payroll system vendors provide customers with real benefits; however, none of these systems adequately address the "pain points" associated with organizational charting and workforce planning. OrgChart Now provides HRIS and payroll system vendors with a seamless solution for quickly and effectively solving this problem.

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## What is OrgChart Benefits

OrgChart Now's built in "cloud connectors" allows end users to create and update charts directly from HR and Payroll systems. By directly querying external systems, OrgChart Now eliminates all of the time consuming, manual steps associated with using tools such as Visio and PowerPoint.

OrgChart Now customer benefits include:
- Easily create board room quality org charts (in minutes not days)
- Import Wizard automatically creates charts by using data from external systems
- High quality publish/print (formats include SVG, PNG, EPS, PPT & PDF)
- Full control over org chart format (fields shown, colors, layout, etc.)
- Create data driven templates or use a library of pre-defined templates
- In place refresh of org charts (single click to refresh data from source)
- Handles broken/incomplete hierarchies
- Change/correct reporting relationships and/or data in real-time and then publish
- Create Workforce Plans & Future Scenarios
- Include workforce analytics in charts (e.g. Various headcounts)
- "PowerPoint" type interface looks professional and is easy to learn

# OrgChart Now – API Requirements

## Existing APIs

Most HR and Payroll system vendors already have an API available to allow their system to exchange data with other systems. If an API exists, OrgChart Now can add a "cloud connector" to query your specific API. OrgChart Now will take can of all required data transformation as long as data must some minimum requirements.

API requirements:
1. API must be accessible over the internet (unless OrgChart Now is hosted by customer or HR/Payroll System Vendor)
2. API must allow OrgChart Now query for all "active" employee records
3. Each employee record must contain a minimum set of required fields (see below). In addition to required fields, any additional number of employees attributes can also be included in the data.

Employee Photos (Optional):
1. URLs to employee photos can be included in query results.
2. Photos must be sized at 256X256 (or less)

Required fields*:
1. Unique ID for each record (Position ID or Person ID)
2. Supervisor ID for each record (Position ID or Person ID for a person's manager)
3. Name
4. Title

* Fields do not need to be explicitly provided – fields can be derived from query data. For example, if 'Last Name' and 'First Name' are provided, OrgChart Now can con

## New APIs

If you are planning on developing an API, here are some hints if you want it to be compatible with OrgChart Now.

Query results must contain a list of 'Person' records. Each record must contain the following data fields:
- PersonID – Unique identifier for each person
- SupervisorID – The 'PersonID' of a person's supervisor (used to build the hierarchy)
- Name – Person's name
- Title – Person's title

Optionally, any number of additional fields can included in the query results. For example, email, department, location or cell phone.

One optional field that is useful is the 'isAssistant' field (setting to '1' will automatically set the branch style to the assistant style for the associated record).

# OrgChart Now – API Requirements

Query responses can be in any format (e.g. XML or JSON). XML Example follows:

```
<queryresults>
 <fields>
  <field id="Name"/>
  <field id="Title"/>
  <field id="PersonID"/>
  <field id="SupervisorID"/>
  <field id="IsAssistant"/>
 </fields>
 <data>
  <row>
   <field id="Name">Charlotte Abbott</field>
   <field id="Title">CEO</field>
   <field id="SupervisorID">0</field>
   <field id="PersonID">1101</field>
  </row>
  <row>
   <field id="Name">Charles Smith</field>
   <field id="Title">VP Sales</field>
   <field id="SupervisorID">1101</field>
   <field id="PersonID">1102</field>
  </row>
  <row>
   <field id="Name">Steve Johnson</field>
   <field id="Title">VP Marketing</field>
   <field id="SupervisorID">1101</field>
   <field id="PersonID">1103</field>
  </row>
  <row>
   <field id="Name">Tracy Stewart</field>
   <field id="Title">Exec Admin</field>
   <field id="SupervisorID">1101</field>
   <field id="PersonID">5100</field>
   <field id="IsAssistant">1</field>
  </row>
 </data>
</queryresults>
```

# Next Steps

Email us at orgchartnow@officeworksoftware.com if you would like us to build a "cloud connector" for your software. Not only will it provide benefits to your customers but it will also give you exposure to thousands of people who use (and free trial) OrgChart Now every year.