



SAP SuccessFactors 

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Implementing Company Organization Structures and Charts

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1 About Company Structure Overview and Organization Charts

SAP SuccessFactors provides tools to help you understand how people and business units are organized in your company.

Organization Charts

An organization chart, or org chart, is a visual representation of people's reporting relationships and internal structure in a company. Within your SAP SuccessFactors system, there are several org charts. The Company Org Chart, usually referred to as Org Chart, is the primary and most commonly used one. Other types of org charts include Calibration Org Chart, Position Org Chart, and Succession Org Chart.

Company Structure Overview

With the Company Structure Overview tool, you can visualize the structure of the company in a chart so that users can easily understand the different departments, business units, and the relationships among them. Users can also create their own personalized views of the company structure.

2 Configuring and Using the Organization Chart

2.1 Organization Charts in SAP SuccessFactors

Organization charts provide hierarchical views of the reporting relationships of people or positions in your organization.

An organization chart, or org chart, is a visual representation of people's reporting relationships and internal structure in a company. Within your SAP SuccessFactors system, there are several org charts. The Company Org Chart, usually referred to as Org Chart, is the primary and most commonly used one. Other types of org charts include Calibration Org Chart, Position Org Chart, and Succession Org Chart. In this guide, you'll learn how to set up and work with the Company Org Chart.

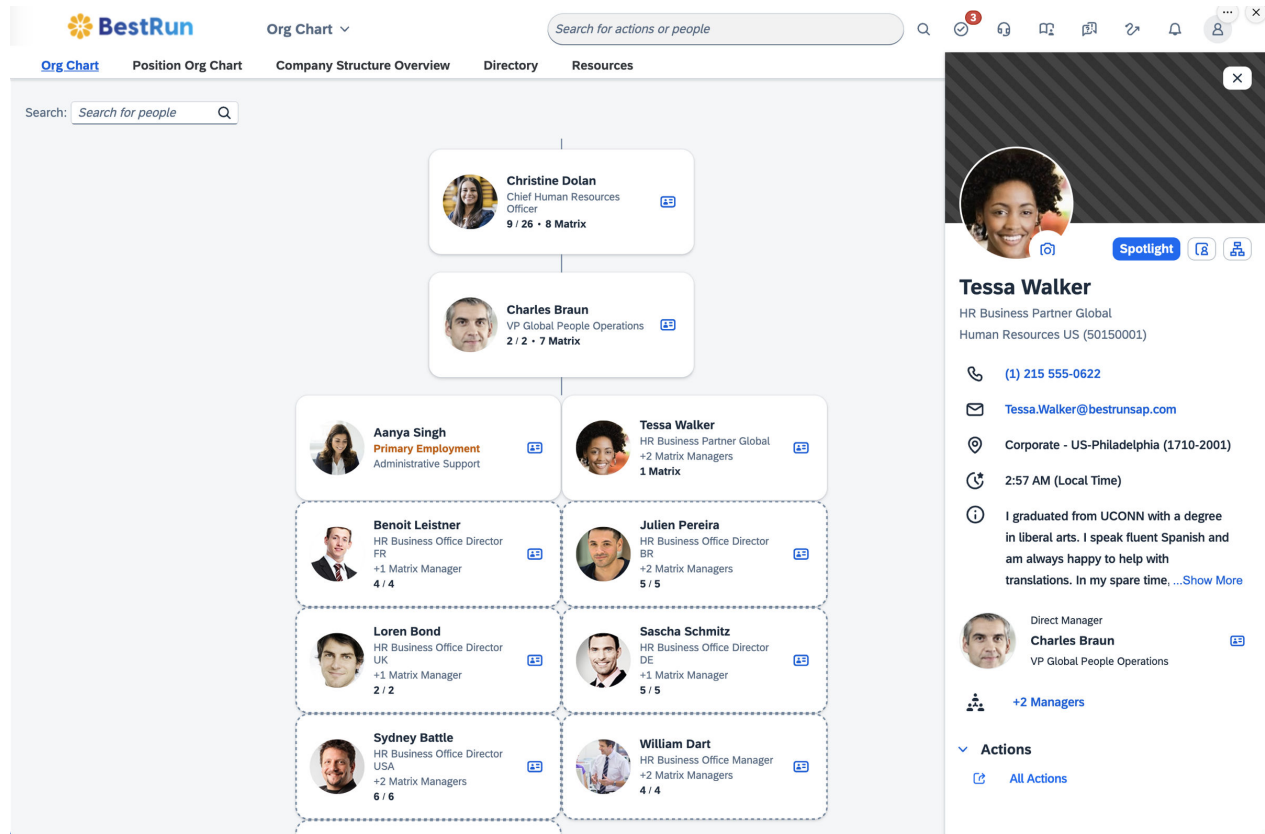
Here are the main differences among the four types of org charts. To learn more about the other types of org charts, go to the links in the More Information column.

Org Chart Type	Descriptions	More Information
Company Org Chart	The Company Org Chart is the primary and most commonly used org chart. It offers a hierarchical view of the people in your organization.	Organization Charts in SAP SuccessFactors [page 4]
Succession Org Chart	The Succession Org Chart is a hierarchical view of the reporting relationships of people and positions in your organization. It's the primary interface for managing succession plans from the perspective of your organization. It has a configurable layout that allows you to show and update succession plans according to the way your organization works.	Succession: Implementation and Administration
Position Org Chart	As an HR administrator responsible for Position Management, you can use the Position Org Chart as your go-to point for viewing and maintaining the position hierarchy at your company.	Employee Central Position Management
Calibration Org Chart	As an HR administrator responsible for creating calibration sessions, you can use the Calibration Org Chart to search for and select session owners, participants, and subjects.	Calibration

2.1.1 Latest Org Chart

The latest Org Chart is the newest version of the Company Org Chart experience. It replaces the legacy Org Chart and is enabled for all customers starting 1H 2025.

Here's an example of the latest Org Chart:



Feature Highlights

- The latest Org Chart shows the direct and matrix reporting relationships in a tree structure. It can display up to 1,000 reports under a single manager.

Note

The latest Org Chart only displays the organization structure of active employees. If there's an inactive manager in the system, and there are active direct reports under the inactive manager, the active direct reports will be displayed as root nodes only when you search for them in Org Chart.

- You can personalize your org chart view by switching view modes:
 - Standard mode (default): You can expand as many employees' reports as you want, as long as it's within the limit.
 - Focused mode: Only one employee's reports can remain expanded.
- You can navigate the org chart using the following interactions:

- Scroll to zoom
- Drag to move
- Click on a card to expand or collapse reports
- Visual representation of different reporting relationships: solid lines for direct reports and dotted lines for matrix reports.
- Out of office information.

📘 Note




In the legacy Org Chart, the out of office label considers absence only. In the latest Org Chart, the out of office icon also considers public holidays and scheduled non-working days, in addition to absence. For more information about out of office information, see [Out Of Office](#).

- If enabled, you can view employee details in Profile Preview and further navigate to the latest People Profile.
- You can export the org chart view as a JPEG image or a PDF document.

Here's a list features supported in the legacy and latest versions:

Features Supported in the Legacy and Latest Org Charts

Feature	Availability in Legacy Org Chart	Availability in Latest Org Chart
Customize display order of reports	Yes	No
<div>📘 Note</div> <p>Deprecated along with the legacy Org Chart</p>		
Display photos	Yes	Yes
Show additional managers	Yes	Yes
Show custom name format	Yes	Yes
Display number of matrix reports on card	No	Yes
Display custom reporting relationships	Yes	No
<div>📘 Note</div> <p>Deprecated along with the legacy Org Chart</p>		
Show global assignments and concurrent employment information	Yes	Yes

Feature	Availability in Legacy Org Chart	Availability in Latest Org Chart
Export org chart as PDF or image	Yes	Yes
		<div>  Note The latest Org Chart supports additional download options. </div> <div>  Caution There are currently some display issues with Firefox and Safari browsers in the latest Org Chart. For better user experience, we recommend using Chrome or Edge browsers. For more information, see 3513635. </div>
Add new employee from Org Chart	Yes	No
		<div>  Note Deprecated along with the legacy Org Chart </div>
Hide contingent workers	Yes	Yes
Hide job titles	Yes	Yes
Hide matrix manager info on company level	Yes	Yes
Horizon visual theme	No	Yes
Navigate to the latest People Profile	No	Yes

Feature	Availability in Legacy Org Chart	Availability in Latest Org Chart
Show out of office information	Yes The out of office label considers absence only.	Yes. In addition to absence, the new out of office icon also considers public holidays and scheduled non-working days.
<div> <div>⚠ Restriction</div> <div>The out of office icon is currently not supported in Safari.</div> </div>		
Show/hide employee photos	Yes	Yes
Switch to focused mode for compact viewing experience	No	Yes
Options to display direct reports or matrix (dotted-line) reports	Yes	Yes
Universal People Search (search for people by additional attributes such as job title, location, department, and so on)	No	Yes
View search history	Yes	No
<div> <div>📌 Note</div> <div>Deprecated along with the legacy Org Chart</div> </div>		

Related Information

[Deprecation of Legacy Org Chart](#)

2.2 Enabling Org Chart

Enable the Org Chart feature in Provisioning so that you can set it up for your organization.

Procedure

1. Go to ► [Provisioning](#) ► [Company Settings](#) ►.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

2. Select the [Ultra Organization Chart](#) option.
3. Save your change.

2.3 Configuring Org Chart

Follow this process to configure and customize Org Chart for your organization.

→ Remember

Unless explicitly specified using the term "legacy Org Chart", the tasks in this section apply to both the legacy and latest version of Org Chart.

[Permissions for Configuring and Using Org Chart \[page 10\]](#)

Administrators and users require different sets of role-based permissions to access Org Chart.

[Enabling Photos \[page 11\]](#)

If you want to show employee photos in the Org Chart, you can enable it in Admin Center.

[Hiding Job Titles in People Search and Org Charts \[page 12\]](#)

Hide the job title information in People Search results and org charts if you don't want it to be displayed.

[Showing Custom Name Format \[page 13\]](#)

You can use the name format that you have been using in People Profile. For example, you can use formal name format of first name, middle name, and last name combination. If you use a custom name format in People Profile, you can also use it in Org Chart.

[Showing Employees with Multiple Employments \[page 13\]](#)

If an employee has multiple employments, for example, a global assignment or concurrent employment, the primary employment is displayed in Org Chart by default. To display active secondary employments, follow the instructions in this task.

[Showing or Hiding Matrix Manager Information on Employee Cards \[page 14\]](#)

Customize how matrix reporting relationships are displayed on employee cards in Org Chart.

[Hiding Contingent Workers \[page 15\]](#)

You can hide contingent workers in the latest Org Chart for all users if you don't want them to see contingent workforce information.

2.3.1 Permissions for Configuring and Using Org Chart

Administrators and users require different sets of role-based permissions to access Org Chart.

Administrator Permissions

As a system administrators, you need the [Org Chart Configuration](#) permission under [Administrator Permissions](#) [Manage System Properties](#) [Org Chart Configuration](#) to set up and configure Org Chart for your organization.

User Permissions

As an employee, you need the following permissions to use Org Chart.

Permission	Description
User Permissions General User Permission Company Info Access	This permission gives users access to the Company Info page, where they can access the Org Chart and Employee Directory tabs.
User Permissions General User Permission Organization Chart Navigation Permission	This permission enables a user to access and navigate the org chart structure. You can restrict org chart navigation by setting a target population. Users can only see the org chart for people who are in their target population. <div>Note When you grant the permission to users, add the users to the target population of themselves.</div>
User Permissions General User Permission User Search	This permission grants access to users so they can search other employees on the org chart. You can define the target population on whom a user can search.
User Permissions Succession Planners Succession Org Chart Permission	If the Limit org chart access to succession org chart users option is enabled in Provisioning, you must also grant the users this permission. <div>Restriction Applies to the legacy org chart only.</div>

Permission	Description
	<p>→ Remember</p> <p>As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.</p>

Related Information

[List of Role-Based Permissions](#)

2.3.2 Enabling Photos

If you want to show employee photos in the Org Chart, you can enable it in Admin Center.

Prerequisites

- You have the [Org Chart Configuration](#) permission.
- The [Enable photos in autocompletion find in the UI](#) option is enabled for your company in Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.

Procedure

1. Go to ► [Admin Center](#) ► [Org Chart Configuration](#) ►.
2. Go to the [Company Org Chart](#) tab.
3. Select the [Display Photo](#) option.
4. Save your changes.

Results

You can now see employee photos in the company org chart, if they're available.

2.3.3 Hiding Job Titles in People Search and Org Charts

Hide the job title information in People Search results and org charts if you don't want it to be displayed.

Prerequisites

You have the ► [Administrator Permissions](#) ► [Manage System Properties](#) ► [Company System and Logo Settings](#) ► permission.

Context

You can use option [Hide job title in People Search and org charts \(Company Org Chart, Calibration Org Chart, and Succession Org Chart\)](#) under ► [Admin Center](#) ► [Company System and Logo Settings](#) ► to hide job title information for People Search and org charts.

ⓘ Note

This option doesn't impact Position Org Chart.

Procedure

1. Go to ► [Admin Center](#) ► [Company System and Logo Settings](#) ►.
2. In the [Company System Settings](#) section, check option [Hide job title in People Search and org charts \(Company Org Chart, Calibration Org Chart, and Succession Org Chart\)](#).
3. Save your change.

Results

The job title field is hidden in People Search results, Company Org Chart, Calibration Org Chart, and Succession Org Chart.

2.3.4 Showing Custom Name Format

You can use the name format that you have been using in People Profile. For example, you can use formal name format of first name, middle name, and last name combination. If you use a custom name format in People Profile, you can also use it in Org Chart.

Prerequisites

- Employee Central is enabled in your instance.
- A name format is configured.
- You have the [Company System and Logo Settings](#) permission.

Procedure

1. Go to ► [Admin Center](#) ► [Employee Files](#) ► [Configure People Profile](#) ►.
2. Click [General Settings](#) and select a name format in the [Choose Name Format](#) field.
3. Save your changes.
4. Go to ► [Admin Center](#) ► [Company Settings](#) ► [Company System and Logo Settings](#) ►.
5. Select the [Enable the name format selected in Configure People Profile to apply globally](#) option.
6. Save your changes.

Results

You've successfully adopted the name format of People Profile in Org Chart.

2.3.5 Showing Employees with Multiple Employments

If an employee has multiple employments, for example, a global assignment or concurrent employment, the primary employment is displayed in Org Chart by default. To display active secondary employments, follow the instructions in this task.

Procedure

1. Go to ► [Admin Center](#) ► [Company Settings](#) ► [Company System and Logo Settings](#) ►.

2. Go to the [Company System Setting](#) section.
3. Select the [Show all active employments \(for Global Assignment and Concurrent Employment\) on Quickcard, Org Chart, and Global Search results](#) option.
4. Save your changes.

Results

You can now view the secondary employment information in Org Chart.

2.3.6 Showing or Hiding Matrix Manager Information on Employee Cards

Customize how matrix reporting relationships are displayed on employee cards in Org Chart.

Prerequisites

You have the [Administrator Permissions](#) > [Manage System Properties](#) > [Org Chart Configuration](#) permission.

Context

In Org Chart, matrix reporting relationships are displayed in the following places:

- If a manager has matrix reports under them, the number of matrix reports is displayed next to direct reports and team size. For example, [4 · 15 / 2 Matrix](#) means that this person has 4 direct reports, 15 total reports (team size), and 2 matrix reports.
- If an employee reports to more matrix managers in addition to the one displayed in the current view, the number of additional matrix managers is displayed on the employee card, for example, [+2 Matrix Managers](#). Note that the count excludes direct managers because there's always only one direct manager for a given employee. By default, this information is visible on employee cards. You can choose to hide it for all users if you don't want them to see it.

Procedure

1. Go to [Admin Center](#) > [Company Settings](#) > [Org Chart Configuration](#).
2. Select the [Hide matrix manager information in Org Chart cards](#) option under the [Company Org Chart](#) tab.
3. Save your changes.

Results

Additional matrix manager count is no longer visible on employee cards.

2.3.7 Hiding Contingent Workers

You can hide contingent workers in the latest Org Chart for all users if you don't want them to see contingent workforce information.

Prerequisites

You have the [Org Chart Configuration](#) permission.

Context

The Admin Center option that hides contingent workers in Org Chart applies to everyone in the company. If not enabled, users can choose to show or hide contingent workers based on their own preference.

Procedure

1. Go to ► [Admin Center](#) ► [Company Settings](#) ► [Org Chart Configuration](#) ►.
2. Select the [Hide Contingent Workers in Org Chart](#) option under the [Company Org Chart](#) tab.
3. Save your changes.

Results

Contingent workers are hidden in Org Chart and users can no longer see the [Include Contingent Workers](#) menu in the [Display Options](#).

2.4 Using Org Chart

Learn how to access, understand, and work with Org Chart.

⚠ Caution

There are currently some display issues with Firefox and Safari browsers in the latest Org Chart. For better user experience, we recommend using Chrome or Edge browsers. For more information, see [3513635](#).

2.4.1 Accessing Org Chart

Here are a few ways you can access Org Chart.

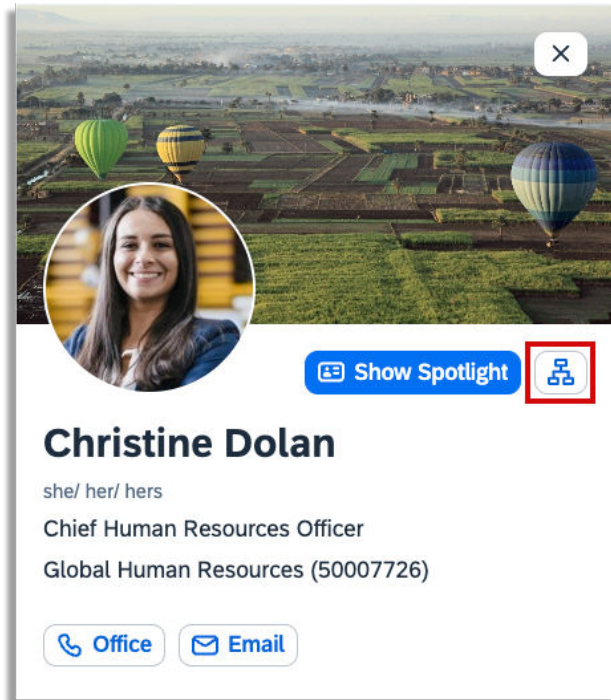
Starting From	How to Access
Home page	You can open Org Chart from the main navigation menu. If the View Org Chart quick action is enabled, you can also access it from the Quick Action section.
Action Search	Search for the View Org Chart action in Action Search using keywords such as org , or chart .

Starting From

Spotlight and Profile Preview

How to Access

If the latest People Profile is enabled, you can navigate to a person's org chart by choosing the org chart icon.



Note

We recommend that you enable or disable both features together for optimal user experience.

2.4.2 Org Chart on the Home Page

Org Chart includes the following features on the home page.

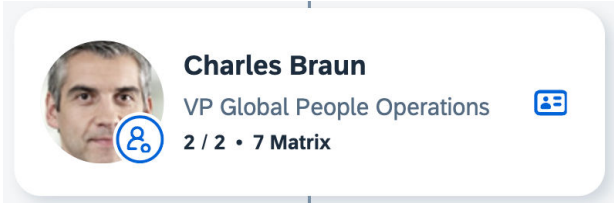



Name	Description	Where Shown	When Shown	Prerequisites	On Mobile App?
View Org Chart	Takes you to the company organization chart.	Quick Actions	Always shown, based on system configuration and user permission.	<ul style="list-style-type: none">Either the legacy or the latest version of Org Chart is enabled.You have Company Info Access permission.It's selected at Manage Home Page Quick Actions.	No

Note
You can use the native Org Chart on iOS and Android mobile applications instead.

2.4.3 Working with Org Chart

Learn how to navigate and work with Org Chart.

Task	Description
Searching for an employee	Use the search box to find people by their name, job title, department, and location.

Task	Description
Understanding cards and the reporting structure	<ul style="list-style-type: none"> Each card represents an employee. A card can contain the following information: <ul style="list-style-type: none"> Name Photo Employment type Job title Direct reports, team size, and matrix reports Out of office icon (considers absence, public holidays, and scheduled non-working days) Direct and matrix reporting relationships are represented using solid and dotted lines. <p>Here's an example of a card in the latest Org Chart:</p> 
Navigating the reporting lines	<ul style="list-style-type: none"> The higher-ups of a person in the organization structure are displayed by default. If a person has direct reports, choose the card to expand or collapse them. Drag the org chart to move. Use scroll or the +/- buttons to zoom.
Viewing employee details	Choose  to open employee details in Profile Preview.
Customizing the org chart view	<ul style="list-style-type: none"> Choose  (Open Display Options) to customize your org chart view with the following options: <ul style="list-style-type: none"> All Reports Direct Reports Only Matrix Reports Only You can also switch to the <i>Focused Mode</i> for a compact view. In the focused mode, you can only expand the reports of the person currently in focus.
Exporting the org chart	<p>Choose  (Export) to download the current view of the org chart as a PDF document or an JPEG image with the following options:</p> <ul style="list-style-type: none"> Specify the file name Include company logo Include current date Hide avatars Hide names

3 Implementing and Managing the Company Structure Overview

3.1 Setting Up the Company Structure Overview

Set up the company structure overview so that you can view the entire structure of your company in chart format.

Procedure

1. Activate the function in the Admin Center.
2. Set the permissions that determine which users are allowed to view and edit the structure.
3. Enter all the details of your company structure.
4. Customize how the UI of the structure will be displayed.

Next Steps

If you run into any difficulties, create a ticket under component [Company Structure Overview](#).

1. [Activating the Company Structure Overview Function in the Admin Center \[page 21\]](#)
Activate the Company Structure Overview function in the Admin Center to enable it and so that you can configure it.
2. [Permissions for the Company Structure Overview \[page 21\]](#)
Get an overview of the permissions (RBP) you need for the Company Structure Overview.
3. [Building Your Company Structure Overview \[page 23\]](#)
Create your company structure overview to specify how the various hierarchies and entities relate to each other.

3.1.1 Activating the Company Structure Overview Function in the Admin Center

Activate the Company Structure Overview function in the Admin Center to enable it and so that you can configure it.

Prerequisites

You have been assigned the necessary permission to access [Manage Employee Central Settings](#) in the Admin Center.

Procedure

1. In the Admin Center for your company, choose [Manage Employee Central Settings](#).
2. In the list of functions, scroll down to [Company Structure Overview](#).

→ Tip

Press CTRL+F to search for a keyword like “Company” to find it more quickly.

3. Select [Company Structure Overview](#) and save.

Task overview: [Setting Up the Company Structure Overview](#) [page 20]

Next: [Permissions for the Company Structure Overview](#) [page 21]

3.1.2 Permissions for the Company Structure Overview

Get an overview of the permissions (RBP) you need for the Company Structure Overview.

View Permissions

Action	Required Permission
View the company structure overview.	► Administrator Permissions ► Company Structure Overview ► Access Company Structure Overview ►
View the entries for the Company Structure field, and the object is secured.	You must have permission to view the category you've used to secure the object.

Action	Required Permission
See how the company structure overview looks on various different dates. By changing the display date, you can choose to see how the company structure overview currently looks (today's date), or how it looked on a specific date in the past.	Administrator Permissions > Company Structure Overview Change Display Date of Company Structure Overview
See how many employees are assigned to a particular entity in the company structure overview.	Administrator Permissions > Company Structure Overview View Employment Count in Company Structure Overview
<p>Note</p> <p>When displayed on an entity in the chart, this count doesn't take the user's role-based permissions (RBP) into account. However, when displayed in the side panel it does take RBP into account.</p>	
See how many positions are assigned to a particular entity in the company structure overview.	Administrator Permissions > Company Structure Overview View Position Count in Company Structure Overview
<p>Note</p> <p>When displayed on an entity in the chart, this count doesn't take the user's role-based permissions (RBP) into account. However, when displayed in the side panel it does take RBP into account.</p>	
Edit Permissions	
Edit the company structure overview, both directly in the company structure overview itself, and in the Admin Center.	Administrator Permissions > Company Structure Overview Access Company Structure Overview Configuration
Create child entities directly in the Company Structure Overview using the menu in the side panel.	Administrator Permissions > Company Structure Overview Create Entity from Company Structure Overview
Edit and create company structure overviews.	Under the User Permissions > Miscellaneous Permissions , the permissions for Company Structure Definition and Company Structure UI Configuration must be assigned.

Users are able to view, edit, and create company structure overviews according to the permissions you assigned.

Note

- The Company Structure Definition is also secured by RBPs, so you can specify which users can edit and view it. For example, some users might have access to a "Business View" and a "Finance View" while other users have access to only one of them. Make sure also that the [Secured](#) field is set to **Yes** in the object definition for the Company Structure Definition.
- Any role-based permissions (RBPs) the user has for MDF objects are taken into account as they view the company structure overview. Access restrictions and RBPs are considered for objects like departments, but also for things like fields and associations.
For more information, please see the guide [Implementing the Metadata Framework \(MDF\)](#) on SAP Help Portal at <https://help.sap.com>.

Parent topic: [Setting Up the Company Structure Overview \[page 20\]](#)

Previous task: [Activating the Company Structure Overview Function in the Admin Center \[page 21\]](#)

Next task: [Building Your Company Structure Overview \[page 23\]](#)



Related Information

[Configuring Permissions for an MDF User Role](#)
[Restricting Data Access of a Role with Target Population or Criteria](#)

3.1.3 Building Your Company Structure Overview

Create your company structure overview to specify how the various hierarchies and entities relate to each other.

Procedure

1. You can get started in either of these ways:
 - In [Company Info](#)  [Company Structure Overview](#) , click the wheel icon (*Configure*) and then choose *Add*.
 - In the Admin Center, search for and open [Configure Company Structure Overview](#). Then choose *Add*.
2. Specify the following info for the structure:

In this field	Enter
Code	A unique ID that differentiates this structure from others
Name	The name of the structure that is visible to other users
Root Entity	Select the object that will be the top level in the structure.
Threshold for Compact View	<p>The number of children above which the structure will be displayed in a more streamlined view in the org chart.</p> <p>For example, if you enter 12, any structure with more than 12 children will be shown as a list rather than as full tiles. This saves space on your screen, and makes it easier to navigate through particularly large or complex structures.</p>

In this field	Enter
	<p>Note</p> <p>If you expand two or more nodes, then the structure is always displayed in Compact View. The <i>Threshold for Compact View</i> is not regarded.</p>
<i>Show Photo for User Fields</i>	<p>If you choose <i>Yes</i> here, employees' profile photos will be displayed beside any visible fields (of type <i>User</i>) in the org chart.</p> <p>Note</p> <p>If you add two or more users with photos, they are displayed side-by-side with a horizontal orientation. Even if name and title are configured, the photos appear without extra info such as name and title.</p>
<i>Show Level</i>	<p>If you check this box, the level of the entity within the hierarchy is shown in the card for that entity. Two additional fields also appear, described below.</p>
<i>Start From Level</i>	<p>This option appears if you check the <i>Show Level</i> box. You can use it to specify the number of the level to be used as top level.</p>
<i>Level Display Mode</i>	<p>This option appears if you check the <i>Show Level</i> box. You can use it to specify whether the level display in the entity cards should be text or an icon.</p>

3. Choose *Apply*.

The structure appears as an org chart, with the root entity already visible. **Note** that the maximum number of levels that can be displayed is 100.

4. Click the root entity, and choose *Add Child Entity* or *Add Parent Entity* to start building up the hierarchy of the org chart.

As you add entities, please keep in mind that:

- Only MDF objects are supported.
- Only fields and valid-when relationships are supported.

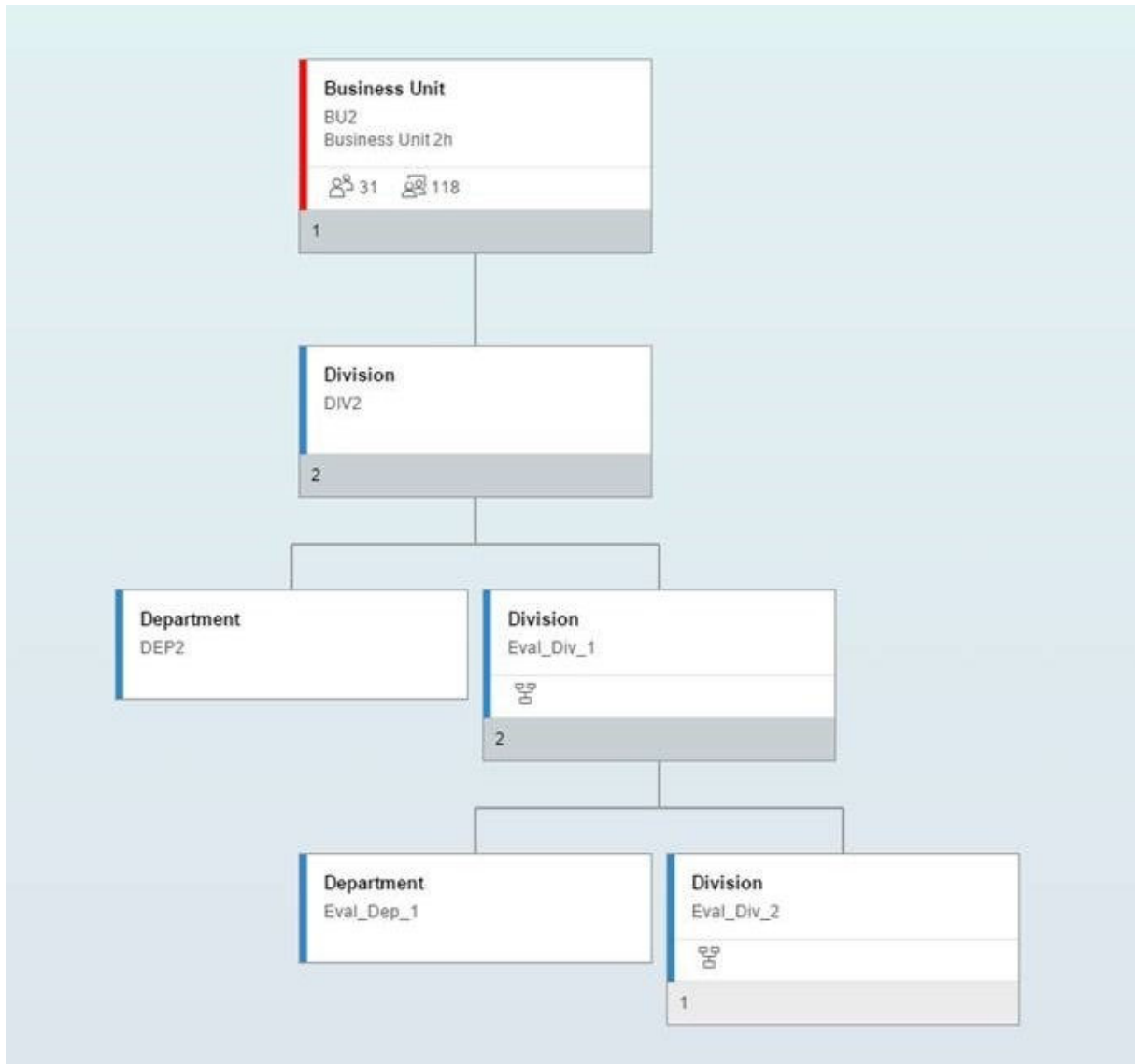
In addition, the config UI checks things like the defined relationship of objects and the role-based permissions of the corresponding user. This determines which entities you are offered as you build the structure.

If an entity has a relationship to more than one other entity, it will appear multiple times in your company structure overview. For example, if a department is the parent entity to both another department **and** a business unit, the parent department will appear twice in the chart. If you configure either of the parent departments, the other one will be updated automatically with the same configuration.

For the purpose of calculating the level, if an entity has more than one parent, parents of the same type are considered first. For example, if a department has a department as a parent in one path and a division as a parent on the other, the department parent is considered first.

If the parents are of the same object type - say, they are both departments - alphabetical order is used.

5. Continue adding further items and specifying the relationship between them in order to build up your company structure. Here's an example of how such a structure could look.



6. When you've added everything you need, choose **Save**.

Task overview: [Setting Up the Company Structure Overview](#) [page 20]

Previous: [Permissions for the Company Structure Overview](#) [page 21]

3.2 Customizing the User Interface of the Company Structure Overview

Configure the appearance of the company structure organization chart to control the amount of information that users see.

Procedure

1. In the Admin Center, go to [Configure Company Structure Overview](#).

You can also just click the wheel icon ([Configure](#)) directly from a company structure overview.

2. Select the relevant structure from the [Company Structure](#) dropdown list.
3. To edit the general characteristics of the structure (its code and name, the threshold for compact view, and whether user photos should be displayed) choose [Details](#).
4. To edit the information displayed for any individual entity within the structure, click the entity and choose [Edit Layout](#).
5. Specify the following information:

Field	Entry
Color	If you want to make the entity stand out more in the org chart, you can assign a unique color to it here.
Hide entity type	If you do not want the entity type to appear in the tiles of your company structure overview, check this box. You have to do this separately for each entity type (Business Unit, Division, and so on).
Show Incumbents	If the entity is Position, you can check this box. The incumbent is then shown in the tile. This option is not available for other entity types. Role-based permissions are not taken into account here.
Visible Fields	Specify which fields will be displayed for the entity on the org chart. You can also check the I and B boxes to stipulate that the text in the tiles is displayed in italics and/or bold text. You can use the arrows to determine the order in which the fields appear in the tile, or use the trashcan icon to remove fields from the display.
Visible User Fields	Specify which user fields will be displayed for the entity on the org chart.
Count People	If you want to count the number of people assigned to the object, enter the field name of the job information that refers to the corresponding object type. The counts are carried out without role-based permission checks.




Field	Entry
Count Positions	If you want to count the number of positions assigned to the object, enter the field name of the position object that refers to the corresponding object type. The counts are carried out without role-based permission checks.
Side Panel Sections	If you want, you can also customize the sequence of the side panel section by entity type (such as a division). You can delete sections of a side panel (note: except the Details) or add a section if required. For example, if you've configured that Count Positions will be used for the Entity type, you can add the corresponding section to the side panel.
List View	You can configure the maximum number of entities before the chart is shown in list view.

6. Choose [Apply](#) to see a preview of the overview with your changes.
7. To make the changes permanent, choose [Save](#).

3.3 Navigating in the Company Structure Overview

Navigate the organization chart to explore your company structure overview.

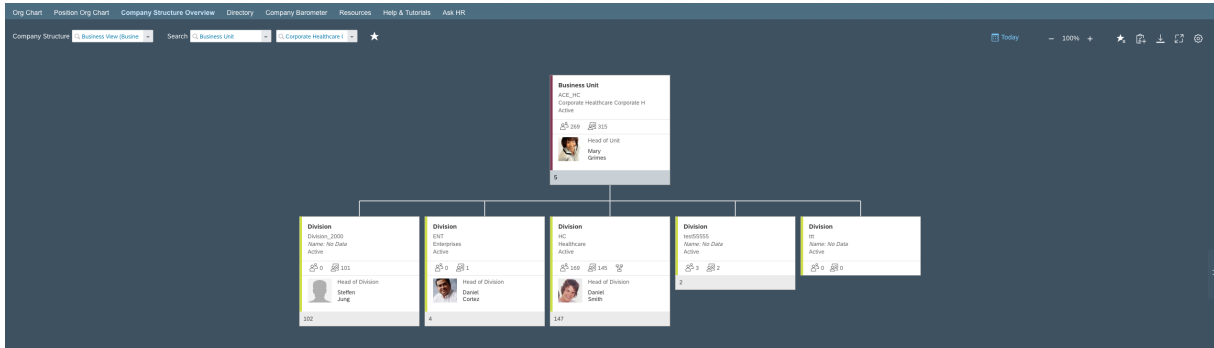
Procedure

1. Go to  [Company Info](#)  [Company Structure Overview](#) , and select the relevant company structure.
You see a dropdown list with all the object types that have been defined for that particular company structure.
2. Select an object type and then an instance of that object type, or select one of your existing favorites. You can save the structure loaded as the root for the structure you are looking at as a favorite. To do this, click the star to the right of the search fields. You can add up to 10 favorites. You can also display a dropdown list of existing favorites by clicking the star at the top right of the display.

The chart appears, loaded with all the relevant data. Users only see data for which they have the relevant role-based permission (RBP). A maximum of 1000 child entities are displayed. If there are actually more than 1000 that could be loaded, a message appears, telling you that only 1000 are being shown.

Note

When you reload or duplicate the page, the system retains the selections you've made for [Company Structure](#) and the 2 [Search](#) fields.



3. In the top-right of the chart, you can:
 - Choose the date for which you want to see the chart (that is, if you want to see your company structure at some point in the past or future). This function is limited to users who have the necessary permission.
 - Export the chart in PDF or JPG format.
 - Switch to a fullscreen view.
 - View favorites (if defined) to reload the chart with the corresponding object as the root node.
 - Add entities.
 - Sort (see step 4).
4. By default, entities are ordered by external code, but you can sort them yourself to suit your own requirements. Such sorting is based on visible fields defined in [Configure Object Definition](#) and takes account of permissions. To define your sorting, select the company structure, click the Sort icon, and define the fields you want to sort per object, the sequence, and whether to sort in ascending or descending order. You can delete these later and delete the sort itself if your requirements change. Sorting is configured:
 - Per user.
 - Per company structure.
 - Based on object definition of each object (examples: Department, Division) used in the structure.
 - Based on certain types of fields. Types of fields are:
 - BOOLEAN
 - STRING
 - STRING LOCALIZED
 - DECIMAL
 - NUMBER

Note: If you have configured onLoad rules under Manage DataObject Configuration for the entity, for example, the department, no rule is triggered in the entity tile of the Company Structure Overview. Neither is the rule triggered in the entity details side panel section of this entity. You must navigate to the entity details with the quick card, Show Department.
5. Click any entity in the chart to navigate to the side panel. The fields you see here depend on how you've configured the UI. (NOTE: The UI adjusts the size of the tiles representing the entities when you open another parent node. As a result, you might see fewer fields on a tile than you've configured. If you click on the tile, you'll see the side panel and can access the full information.) Depending Specifically, you only see those fields that you defined as visible fields in the company structure UI configuration for this object type. The side panel displays a maximum of 30 levels. If there are more, the system displays a message telling you that only 30 levels can be displayed. Here's an example of the information you can find here:

Section	Info
Details	What appears here depends on what you have configured for this object in the company structure overview. For, example, the external code and name of the entity, its current status (active or inactive), and its current leader.
Multiple Parents Details	If an entity reports to multiple parents and you have the authorization to see them, you see and can navigate to those parents here. If an entity only reports to a single parent, this section doesn't appear.
History	The date on which the entity was created in the system, and the date on which the most recent changes were made. If there are any future changes planned, they will also be listed here.
People	<p>A list of everyone assigned to this particular entity. Your employees' names are sorted depending on the name format you've configured.</p> <div> <p>Note</p> <ul style="list-style-type: none"> Only up to 1000 employees are displayed in the People side panel section. You can use the search bar to search among employees, including those that aren't currently displayed. This section only appears if you maintained the Count People field for this entity (see Customizing the User Interface of the Company Structure Overview [page 26]). The system doesn't consider an employee's permission to User Permissions > Employee Central > Employee Central Effective Dated Entities > View History and View Current of an entity when it calculates the value of Full-Time Equivalents for an entity in the CSO. </div>
Positions	<p>A list of all the positions assigned to this entity. You can search for individual positions, and, if you have the necessary permission, you can edit entity details. You can also click a position and load it as the root object in the position organization chart.</p> <div> <p>Note</p> <ul style="list-style-type: none"> This section only appears if you maintained the Count Positions field for this entity (see Customizing the User Interface of the Company Structure Overview [page 26]). </div>

- You can modify the position object from the side panel if you have the role-based permission. The changes sync to the incumbent if you have made the appropriate entries in Position Management Settings. For full information on this, take a look at the *Define Synchronization Position to JobInfo* section of the *Employee Central Position Management* implementation guide.
- If there's a large number of positions or incumbents to be loaded and processed by the system, then only 1000 positions and incumbents are displayed in the entity tile of the company structure overview.

Hierarchy Details

The number of entities on the level directly below the current one, and the number of entities in the complete sub-structure (that is, **all** entities below the current one).

If you've customized [Count Positions](#) and [Count People](#) to be displayed as described in [Customizing the User Interface of the Company Structure Overview \[page 26\]](#), you can see both counts here.

ⓘ Note

The counts are **not** secured by role-based permissions (RBP).

3.3.1 Display of Hierarchical Relations in the Same Object

A child department is sometimes displayed as a child and also on the same level as the parent.

If you've defined

- an association between two objects, for example, the business unit (parent) and department (child).
- a department object on the parent department.
- a Company Structure Overview which contains the association between the two objects (Business Unit and Department) and the two department relations (parent department and child department).

then the child is shown **below** the parent, but also **on the same line** as the parent.

ⓘ Note

This is expected behavior. The reason being that the department not only has an association to the parent department but also to the business unit.

Since you have added both association to the Company Structure Overview definition, the department is shown under both the parent department and the business unit.

3.4 Searching the Chart by People

Once your company structure overview is up and running, you can search within it for individual employees.

Prerequisites

Your company structure overview has at least one visible field of type [User](#), or at least one object for which [Referencing Job Information Field](#) has been maintained and the People Section is added to the side panel.

Procedure

1. Open a company structure.
2. From the [Search](#) dropdown list, choose [By People](#).
3. Enter an employee name.

A list of search results appears. Move your cursor over the relevant employee to see the business unit, division, or department to which they're assigned. If you want, you can click the assignment to reload the org chart with that assignment as the root object.

Note

If you use Concurrent Employment at your company, by default you only see the person's primary employment in the list of search results. However, if you click the person's name, you can then navigate to their other employments directly from the list.

3.5 Adding an Entity in the Company Structure Overview

When the organizational layout of your company changes, you can update your company structure overview by adding new entities and child entities.

Prerequisites

You've been assigned the [Create Entity from Company Structure Overview](#) permission. Take a look at the list of permissions in the *SAP SuccessFactors Role-Based Permissions* guide.

Add New Entity

1. In [Company Structure Overview](#), open the company structure in which you want to add a new entity.
2. Click the [Add Entity](#) icon in the top-right hand corner.
A list of possible entities appears. The options available here depend on your configuration settings.
3. Choose the entity you want to add, enter all the necessary details, and save.
The company structure overview is immediately updated with the new entity.

Add Child Entity

1. In [Company Structure Overview](#), open the company structure in which you want to add a new child entity.
2. Click an entity (for example, a Business Unit).
3. Open the hamburger menu and choose [Add Child Entity](#).
A list of possible child entities appears. The options available here depend on your configuration settings, and on the type of entity you initially clicked to open the menu. For example, under a [Business Unit](#) you might be able to add a [Division](#) and a [Department](#) as child entities, but under a [Department](#) you might only be able to add another [Department](#).
4. Choose the child entity you want to add. Enter all the necessary details.
The system defaults the display date as the effective start date for the entity to be created. The parent entity is also defaulted, but you can edit this.
5. When you're done, save your entries.
The company structure overview is immediately updated with the new child entity.

3.6 Editing Entities from the Company Structure Overview

When the organizational data of an entity changes, you can update your Company Structure Overview by editing existing entities.

Prerequisites

You have been assigned permission to, for example, insert, correct, or delete MDF objects. Take a look at the list of permissions in the *SAP SuccessFactors Role-Based Permissions* guide for full information.

Editing Entities

1. In Company Structure Overview, open the company structure where you want to edit an entity.
2. Choose the entity of the selected company structure (example: Division) to open the side panel, then choose the Show icon for the entity.

- Depending on the permissions you have, either an [Edit](#) link and/or a [Manage](#) link then appears.

ⓘ Note

Choosing the [Manage](#) link takes you to [Manage Data](#). When you go to [Manage Data](#) and perform changes there, you navigate away from the company structure overview. So you then need to reload the company structure and the corresponding entity again..

- Make the changes you want to make, then save them.

Related Information

[Editing Entities from the Company Structure Overview \[page 32\]](#)

3.7 Rule Functions in the Company Structure Overview

The Company Structure Overview includes a rule function you can use to address certain business needs - for example, to decide whether and which workflow is triggered or to ensure that your company structure does not exceed a certain number of levels.

[Get Level of Entity Within Company Structure \[page 33\]](#)

The rule function calculates the level of a certain entity used in company structure definitions.

3.7.1 Get Level of Entity Within Company Structure

The rule function calculates the level of a certain entity used in company structure definitions.

It is important that you define the parameters for the IF statement as mentioned in the parameter table below.

If the conditions are met, the rule triggers the desired operation.

For example: If the rule function is used to verify that the company structure does not exceed a desired number of levels and you want to raise an error message if that number is exceeded, you must proceed as described in the *Make this entry:* column.

Input Parameters

For this parameter..	Of type...	Which is...	Make this entry:
Company Structure Definition	Text Value	Required	The company structure that is used to calculate the level.
Entity	Text Value	Required	The entity instance for which the level will be calculated. Example: Department.

For this parameter..	Of type...	Which is...	Make this entry:
Effective	Number	Optional	The date on which the level of the entity instance is calculated. If you don't enter anything, the current date is used.
Top Level	Number	Optional	The level of the root object in your company structure. If you don't enter anything, level 1 is used.

Additionally, you must define the THEN statement to raise the error message and add the rule as onSave rule, for example to the department object. The level is counted from the root object, such as a Business Unit, and depending on the Top Level number you have defined in the business rule.

Here's an example of how the rule could look:

History «

01/01/1900
Take Action
Rule created

deprtmnt_rule_function_test (deprtmnt_rule_function_test)
Insert New Record

Scenario: Rules for MDF Based Objects
Change Scenario

Basic Information

Start Date: 01/01/1900
Description:
Base Object: Department
Purpose: Evaluate

Parameters

Name	Object
Context	System Context
Department	Department
Original Record	Department

Show More
Collapse All | Expand All

Variables

If

Get Level of Entity Within Company Structure
Company Structure Definition: TestCompany (TestCompany)
Entity: Department
Effective Date: Null
Top Level: Null

>=
4

Then

Raise Message " ProbationExtensionError " with Error severity
Previous probation contract End date must be BEFORE the current probation contract end date in order for the event to be "extended"

Updated by adminF adminL on Wednesday, October 27, 2021 5:30:21 AM EDT

4 Change History

Learn about changes to the documentation for Implementing Company Organization Structures and Charts in recent releases.

1H 2025

Type of Change	Description	More Info
Changed	We merged the content from the Implementing and Managing Company Structure Overview guide and the Configuring and Using the Organization Chart guide into the new guide.	
New	The latest Org Chart shows additional matrix manager counts in employee cards.	Showing or Hiding Matrix Manager Information on Employee Cards [page 14]
New	Contingent workers can be hidden on the instance level and user level.	Hiding Contingent Workers [page 15]

2H 2024

No changes.

1H 2024



Type of Change	Description	More Info
Changed	We restructured the guide for the latest Org Chart.	
Changed	We added information about the new out-of-office icon indicator. The new out of office icon also considers public holidays and scheduled non-working days, in addition to absence in the legacy Org Chart.	Latest Org Chart [page 5]
Changed	We updated the instructions for customizing name formats in the latest Org Chart.	Showing Custom Name Format [page 13]

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