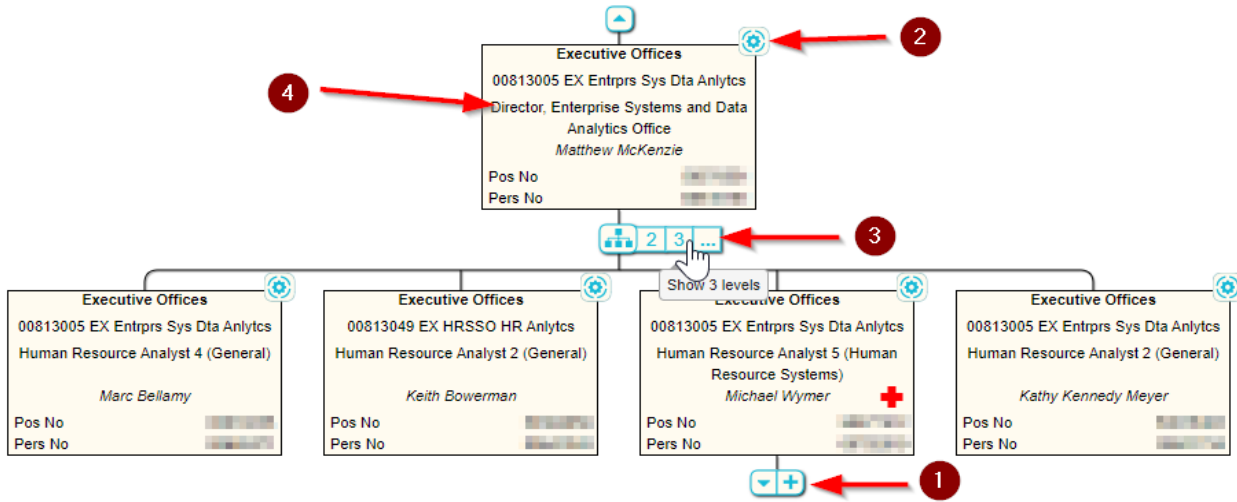






Quick Guide to Online OrgCharts

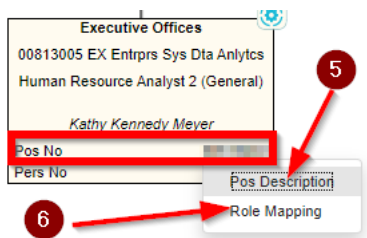
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General Navigation



- i) The Customer can drill down or up the Orgchart using the  and  buttons **1**.
- ii) The employee profile can be viewed by clicking the  button on the top left corner for each employee box **2**.
- iii) The OrgChart can be modified to show 2 or more levels using the  icon **3**.
- iv) The Job specification and expanded job information can be viewed by clicking on the Job Title as shown in **4**.



- v) The Pos No field displays a list when selected. The Position Description can be viewed by clicking the Pos Description as shown in **5**.
- vi) The SAP position cost distribution and role assignments can be viewed by selecting Role Mapping from the list as shown in **6**.

Performing a Customized Search

Executive Offices as of 04/04/2022

Search

Criteria: Save... Clear

Everyone
 Limit search to current top of chart

Add columns to results: --column to add-- Add

Filters:

Groups

- Civil Service Salaried Vacancies
- Essential Positions
- Everyone except Contractors
- Financial Disclosure- Attorneys
- Financial Disclosure- Board Members
- Financial Disclosure- Employees
- Financial Disclosure- Officials
- Non-Commonwealth Travelers/Board Memit
- Salaried
- SMS

Position Type

- Business Partner/Contractor
- Department
- Employee
- Indirect Report
- Manager
- Non-Commonwealth Traveler/Board Membr
- Open Position
- Recruitment

Name	Box Title	Job Title	Last name	First name	Spvr Pos No	Pos No
Terri Bennett	Executive Office	Human Resourc	Bennett	Terri		
Brent Bland	Executive Office	Human Resourc	Bland	Brent		
Laurie Cohrac	Executive Office	Human Resourc	Cohrac	Laurie		
Angela Crumlich	Executive Office	Human Resourc	Crumlich	Angela		
Marie Delpais	Executive Office	Human Resourc	Delpais	Marie		
Sherry Graybill	Executive Office	Human Resourc	Graybill	Sherry		
Stefanos Kanelakis	Executive Office	Human Resourc	Kanelakis	Stefanos		
Nicole Livesay	Executive Office	Administrative C	Livesay	Nicole		
Jeanette Long	Executive Office	Human Resourc	Long	Jeanette		
Courtney Lucas	Executive Office	Human Resourc	Lucas	Courtney		
Christi Moore	Executive Office	Human Resourc	Moore	Christi		
Chaithanya Nagaraju	Executive Office	Business Analys	Nagaraju	Chaithanya		
Brook Nale	Executive Office	Data Analytics S	Nale	Brook		
Christopher Norris	Executive Office	Director, Human	Norris	Christopher		
Jayel Palmer	Executive Office	Human Resourc	Palmer	Jayel		
Kathy Reichert-Wise	Executive Office	Human Resourc	Reichert-Wise	Kathy		

29 results

- i) An employee Search can be performed using the Search box shown in 1. Clicking on the will open a Dialog box where search can be customized as per the customer needs.
- ii) Using criteria listed at 2, the customer can limit search to the top of the chart or to everyone
- iii) The Filters at 3 will allow the user to customize search based on Groups or Position Type.
- iv) The user can add the columns to the search as needed at 4, by selecting the column from the dropdown list and clicking on the (Add) button.

Add columns to results

--column to add--

- column to add--
- Middle name
- Aap Ct
- Annual Epr Date
- Annual
- Appropriation
- Bg Unit
- Bi-Weekly
- Bud Imp Ind
- Chart Passwd
- Chart Username
- City
- Confidential Indicator
- Cont Typ
- Control No
- Cost Center
- Department Name
- Eeo Ct
- Emp Sub Grp
- Essential Pos Task

- v) The customer can save the Search using the "Save" button at 5
- vi) The customer can export the search results to an excel file using the icon at 6

Types of Views

Fig-1 : Example of OrgChart view drilled down to level 3

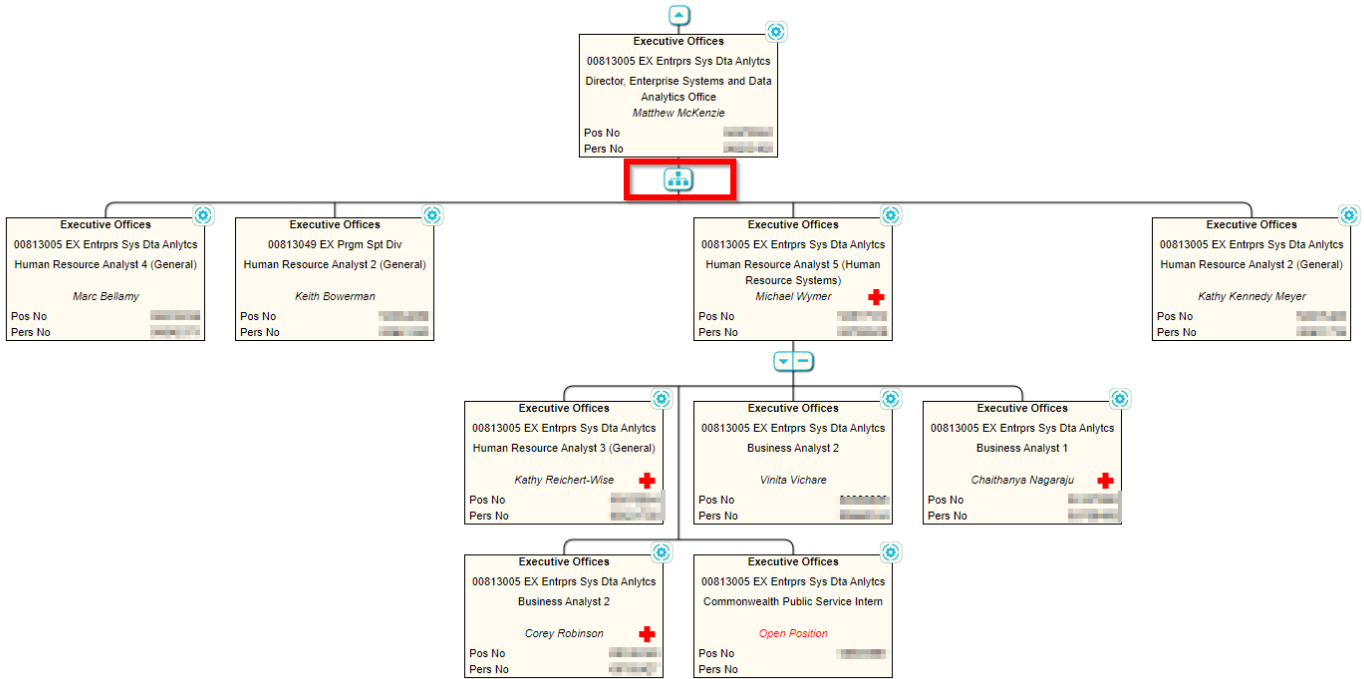


Fig-2 : Example of Direct Reports view

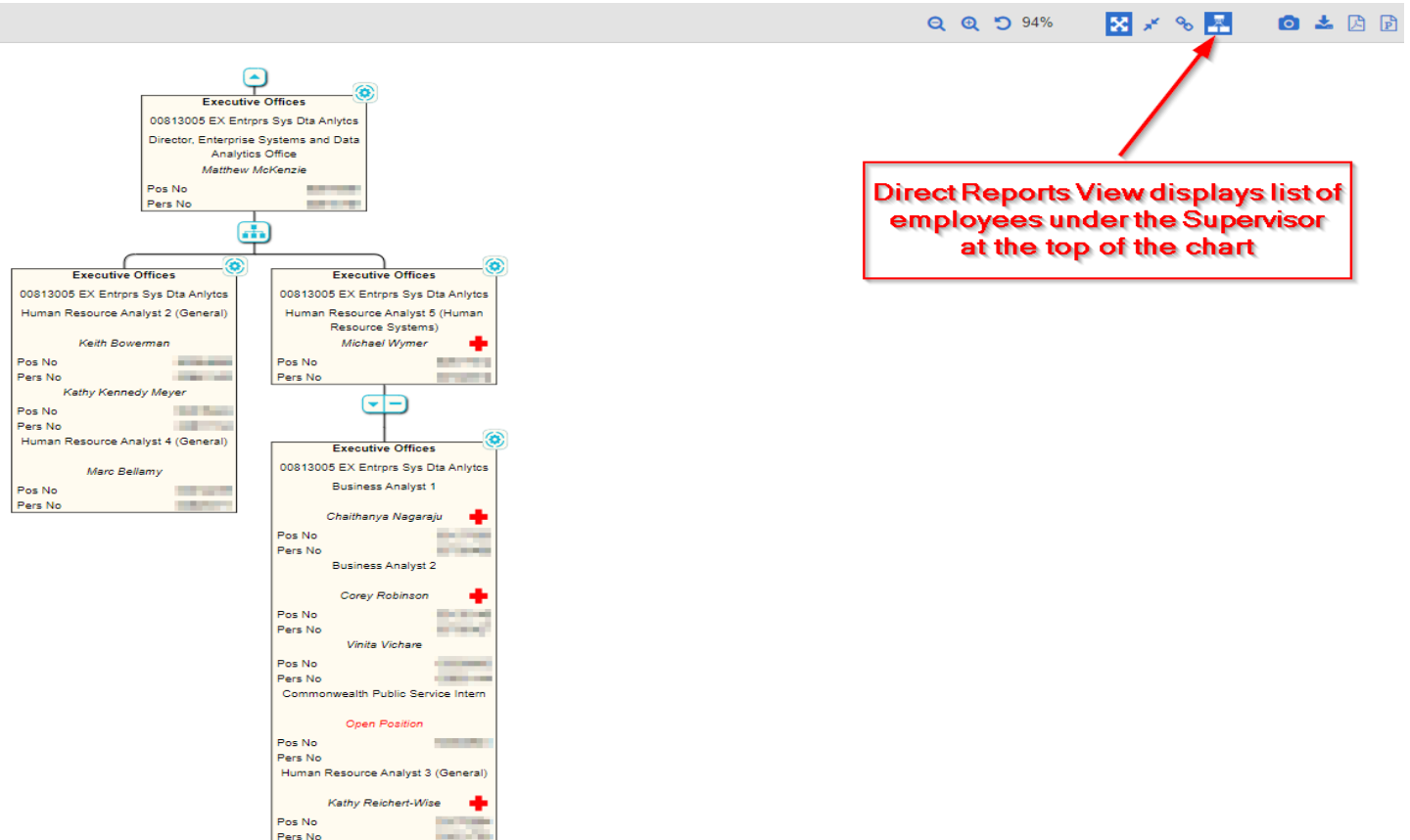


Fig-3: Example of Compact View

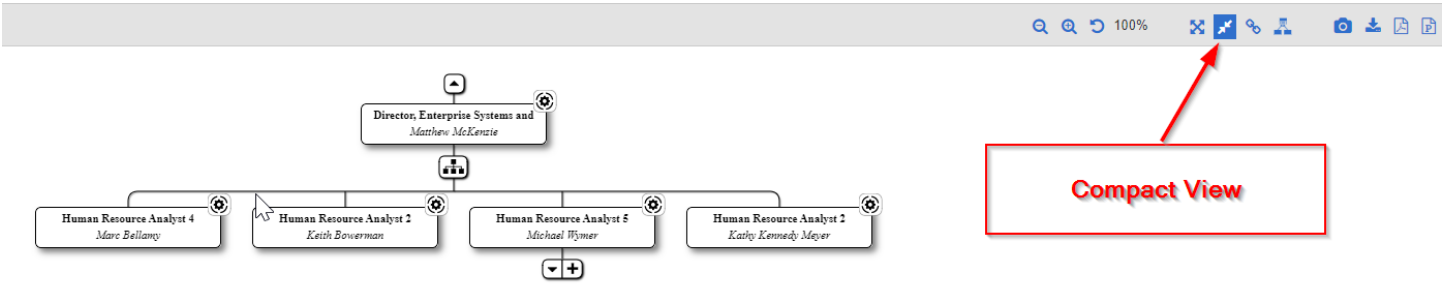
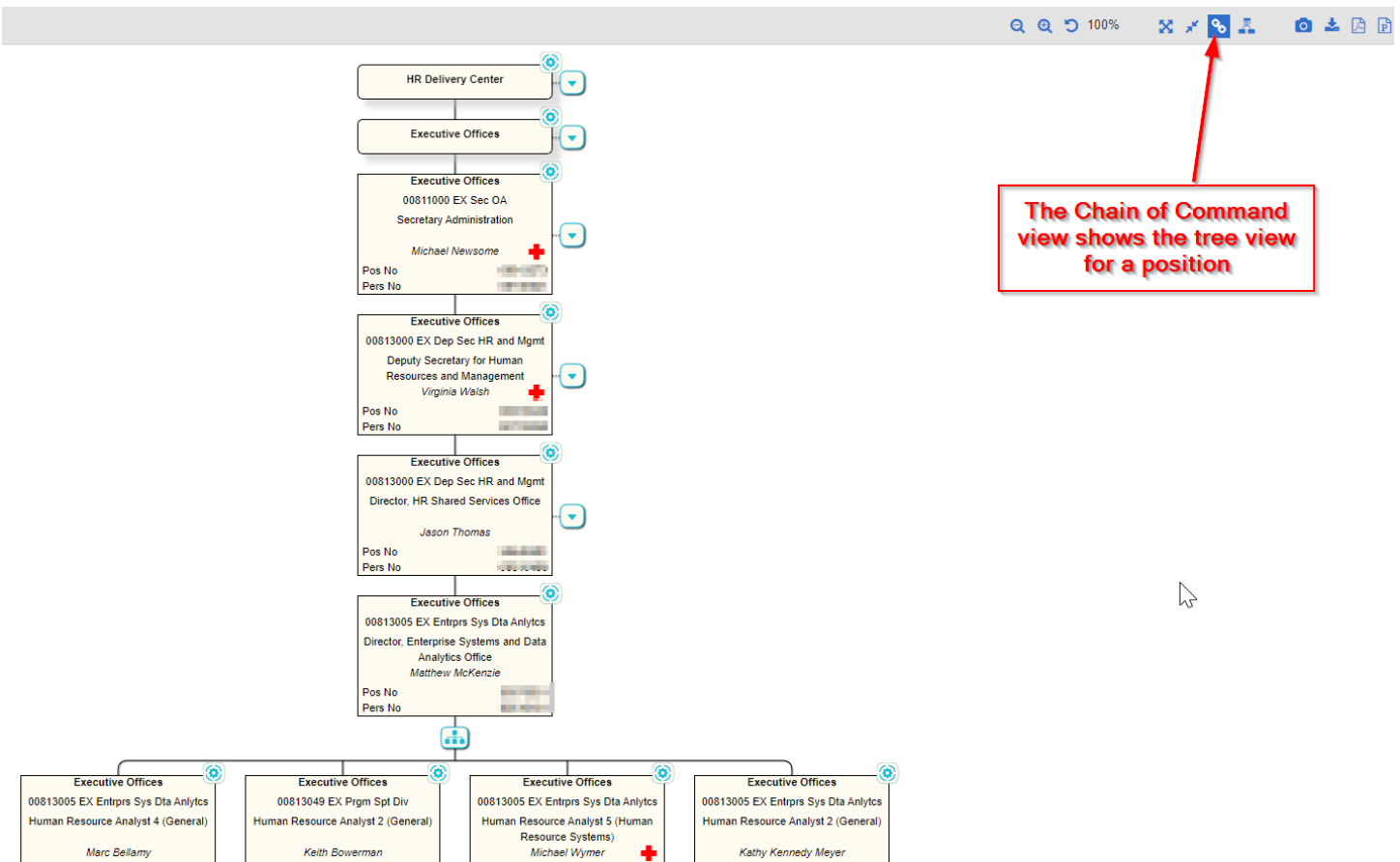
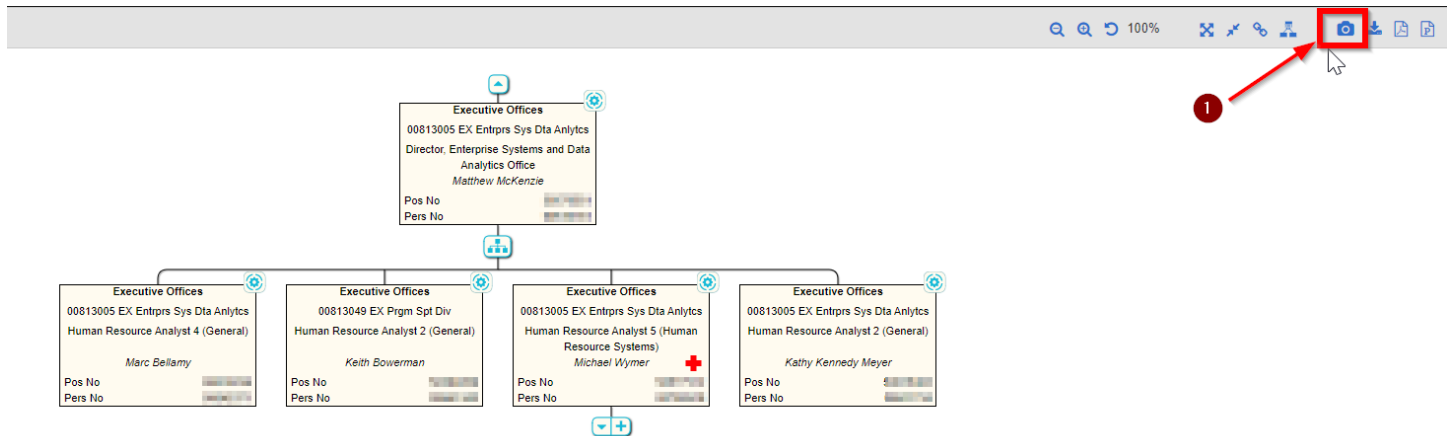



Fig-4: Example of Chain of Command view



Capture the view (Take a snapshot of the view)

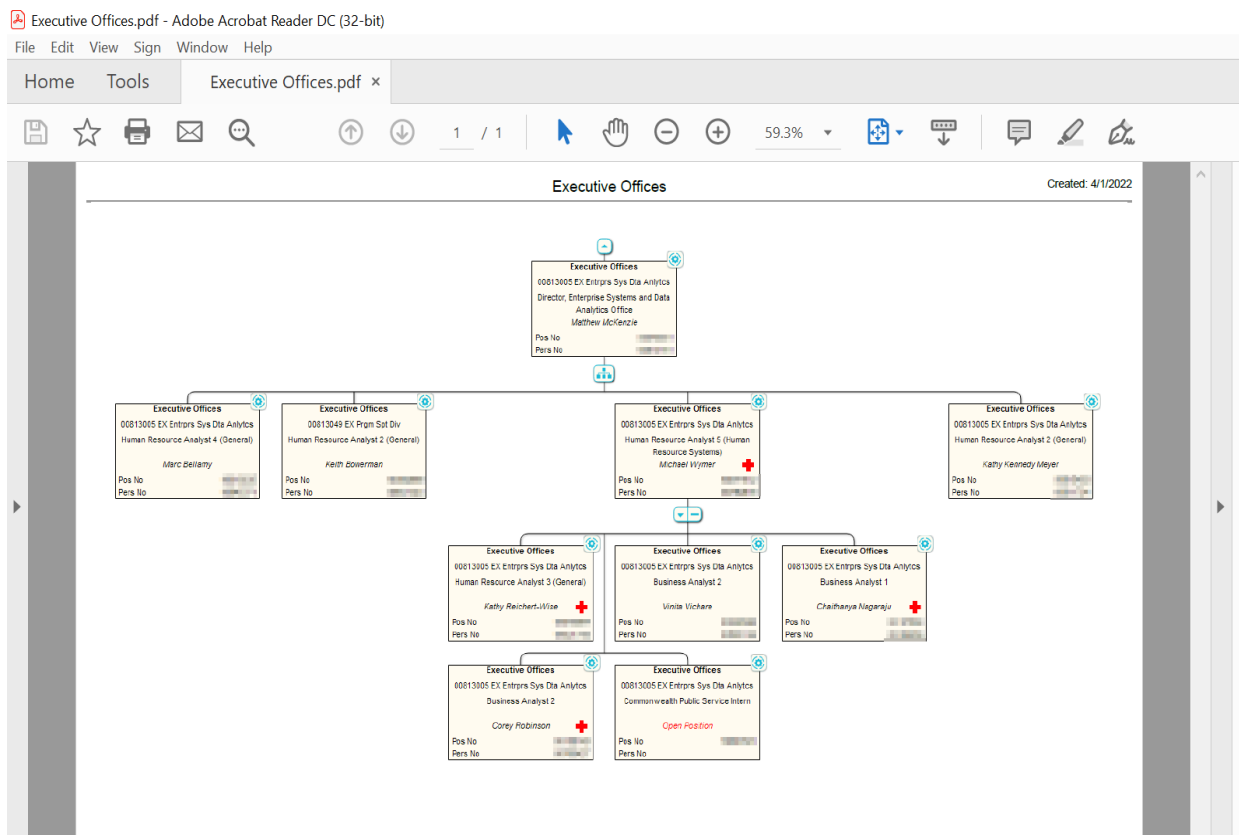


- i) Choose the type of view based on user needs.
- ii) Click on the  icon on the top left-hand corner of the page as shown in **1**.
- iii) A dialog box will open as shown below. Enter the Title and click on “Export to PDF” button.

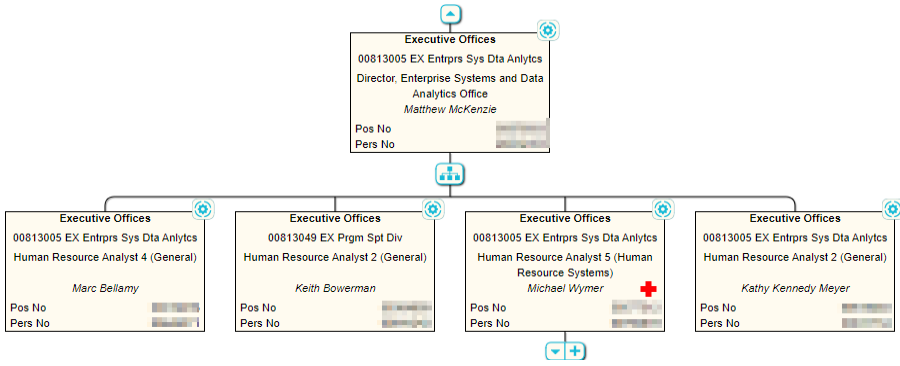
The 'Capture View' dialog box is shown with the following details:

- Radio button selected: Export capture as a single page report
- Radio button unselected: Save capture to export later as a multi-page report
- * Title:
- Buttons: **Export to PDF** (highlighted with a red box and arrow), Cancel

- iv) The downloaded PDF is as shown below:



Exporting OrgChart View



Export view to PDF

Export to PDF
From Matthew McKenzie

Levels to show: 2

Include index:

Show chart background:

Include legend:

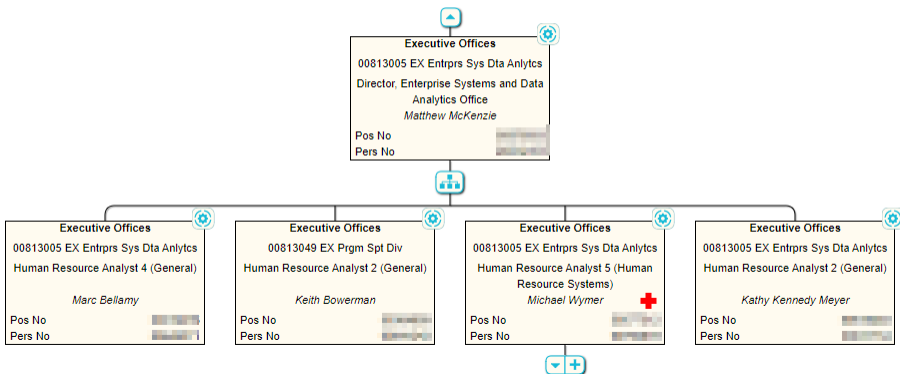
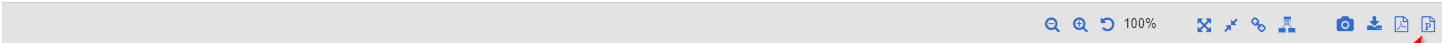
Page size: Ledger

Orientation: Landscape

Scaling: 100%

Click OK to export

OK Cancel



Export view to PowerPoint

Export to PowerPoint
From Matthew McKenzie

Levels to show: 2

Show chart background:

Include legend:

Page size: Ledger

Scaling: 100%

Click OK to export

OK Cancel