ConnectCarolina InfoPorte
HR/Payroll

Working with Org Charts and Reporting Structures

VERSION: April 2018

Seeing Organizational Charts

The organizational charts in ConnectCarolina allow you to see the reporting structure for employees at the University. You can change the focus of the org chart to move up or down the reporting structure, as necessary. Besides the organizational relationship for each employee on the chart, you can see his or her email address, phone number, and business address. You can also export the information on the org chart to Excel if, for example, you need a list of email addresses for a department or to Visio, if, for example, you need to post on your departmental website.

A few things to keep in mind about using the Org Chart Viewer:

- The Org Chart Viewer is based on who an employee reports to in ConnectCarolina and doesn't show vacant positions, so if you have a supervisor position that is vacant, it won't display on the org chart.
- If you are looking at an employee who doesn't have a position number, for example, a faculty member, who reports to another employee without a position number, that employee shows as reporting to all of the supervisor's jobs. For example, if an assistant professor reports to a Dean who also has an appointment as a professor, the assistant professor shows in the reporting structure of both the Dean appointment and the professor appointment.
- Currently, the Org Chart Viewer only contains organizational charts for UNC-Chapel Hill.

Using the Org Chart Viewer

Follow these steps:

1. Choose this menu option:

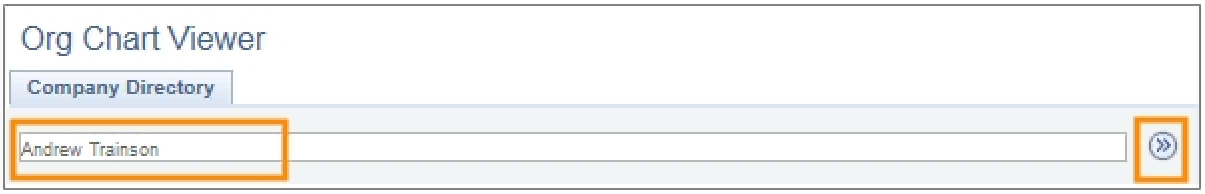
   Main Menu > HR WorkCenter > Org Chart Viewer

2. Click the double arrows to minimize the HR WorkCenter.

3. Do one of the following:

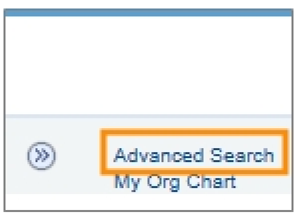
- If you know which employee you'd like to see an org chart for, enter the name of the employee you're searching for and click the double arrow button.



Result: The system displays one of the following:

  - If more than one employee's name matches your search or if the employee has more than one job in the system, the system displays a list of search results. Skip to step 5.
  - If only one person matches what you typed, the system displays the organizational chart for the employee you searched for. Skip to Step 6.

- To search for employees by department, location, or other criteria, click the **Advanced Search** link.

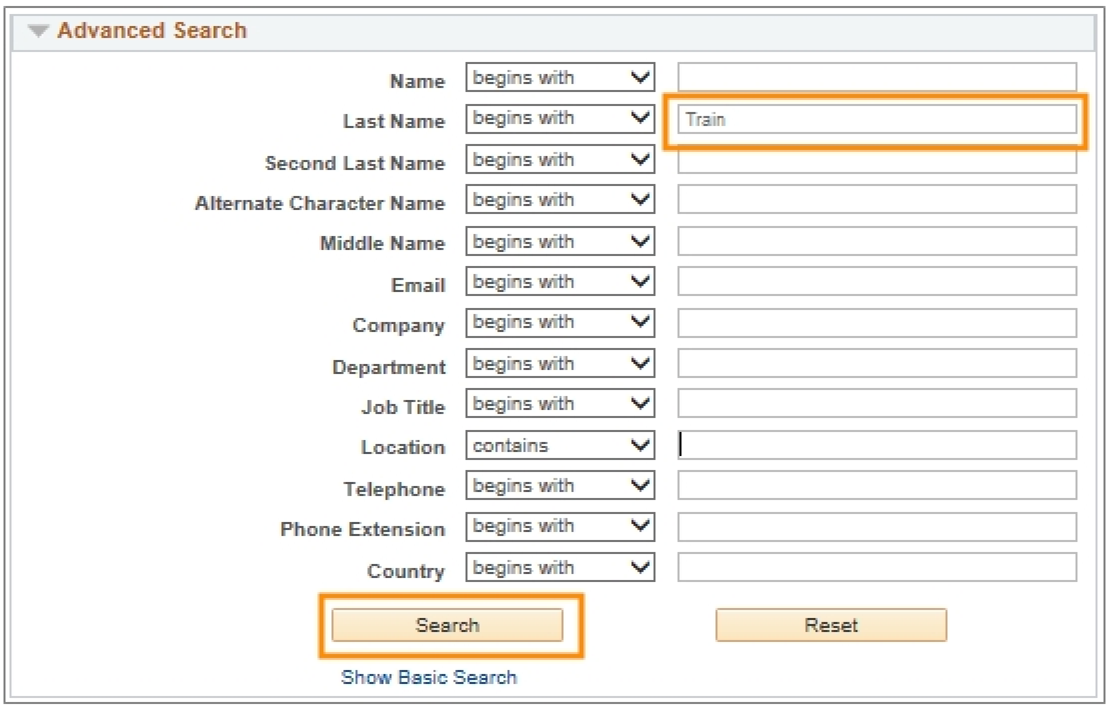


Result: The system displays the Advanced Search box.

4. On the Advanced Search page, complete as many fields as needed to find the employee you're searching for and click the **Search** button.

In this field:	**Do the following:**
Name	Enter the name of the employee.
Last Name	Enter the last name of the employee.
Second Last Name	Enter the second last name of the employee, if applicable
Alternate Character Name	Leave this field blank, it isn't used at UNC-Chapel Hill.
Middle Name	Enter the middle name of the employee.
Email	Enter the email address of the employee.
Company	Leave this field blank. Only results for UNC-Chapel Hill are included.

In this field:	Do the following:
Department	Enter the department that the employee's job is in.
Job Title	Enter the title of the employee's job that corresponds with the job code. **Note:** The job title may be different from the employee's working title.
Location	Enter the physical location of the employee's position.
Telephone	Enter the work phone number of the employee.
Phone Extension	Leave this field blank.
Country	Leave this field blank.

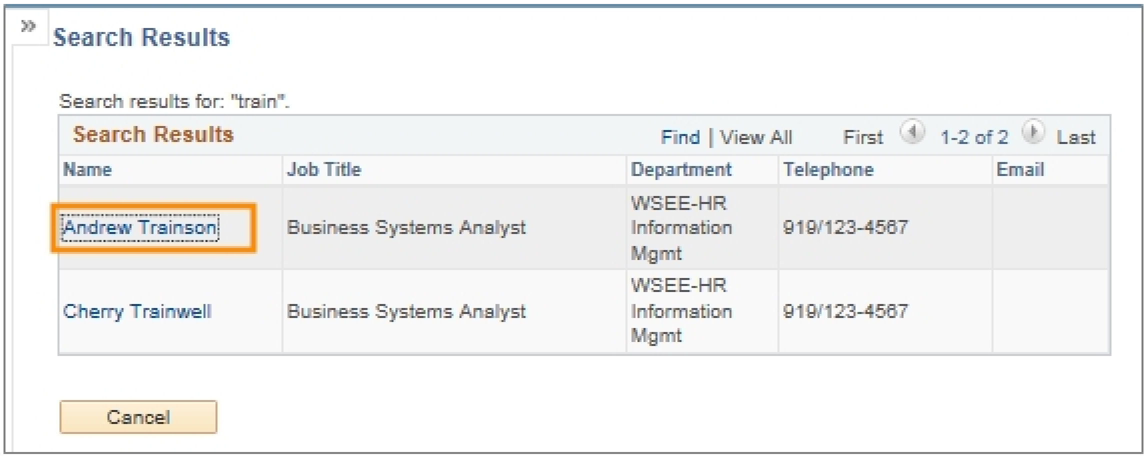


Result: The system displays one of the following:

- If more than one employee's name matches your search or if the employee has more than one job in the system, the system displays a list of search results. Skip to step 5.
- If only one person matches what you typed, the system displays the organizational chart for the employee you searched for. Skip to Step 6.

5. Click the employee's name in the list of search results.

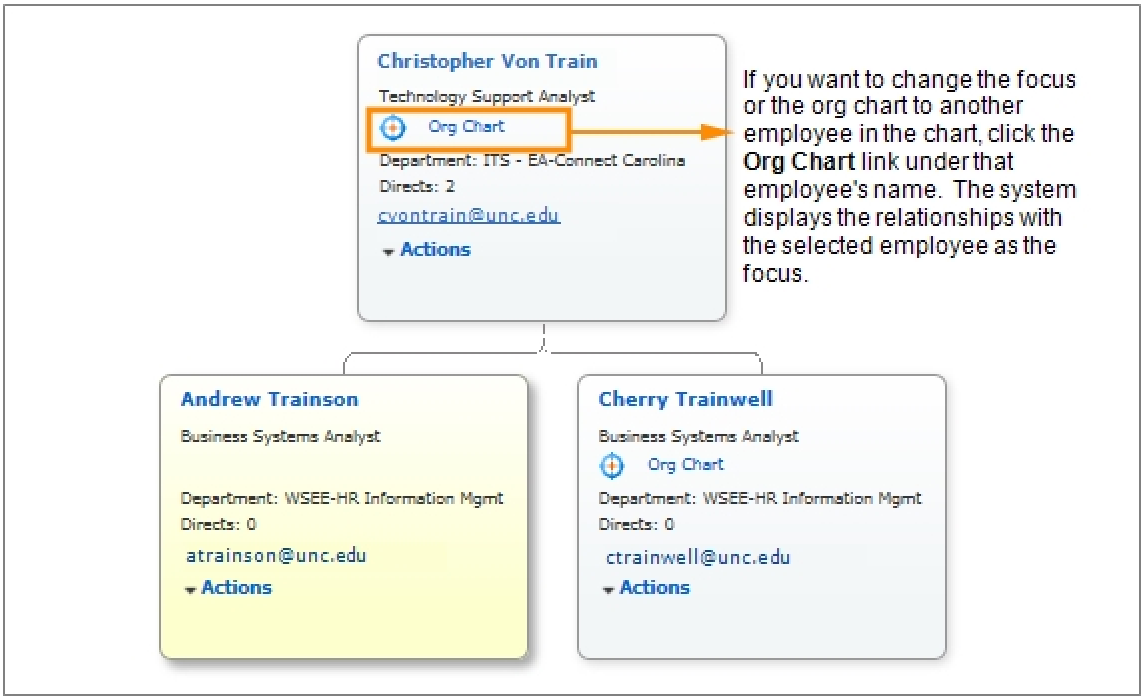
   Note: If the employee has more than one job, be sure to click the name in the row that has the job title you're looking for.



Result: The system displays the organizational chart for the employee you selected. The employee's information is in a yellow box, which indicates the focus of the org chart.

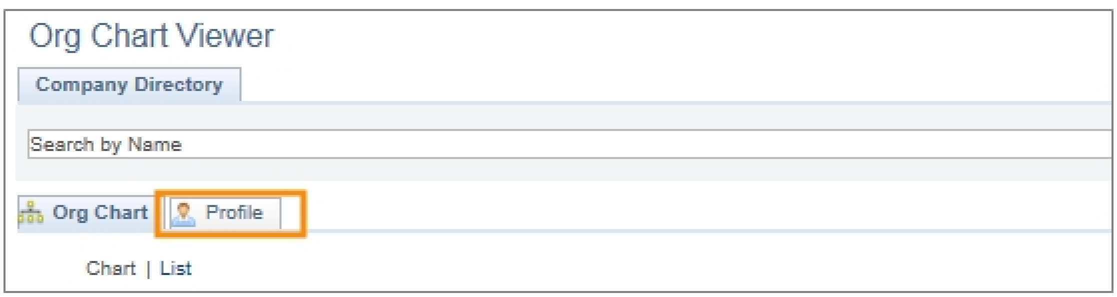
6. You can see the following information about the employee, and anyone in the same reporting structure, in a chart view:

- Primary name
- Job title, this is the title that corresponds with the job code, which is not always an employee's working title
- Department, this is the home department of the job that you're looking at
- Direct reports
- Email address



7. Do one of the following:

- To see contact information and details about the employee's organizational relationships, click the **Profile** tab on the top left.

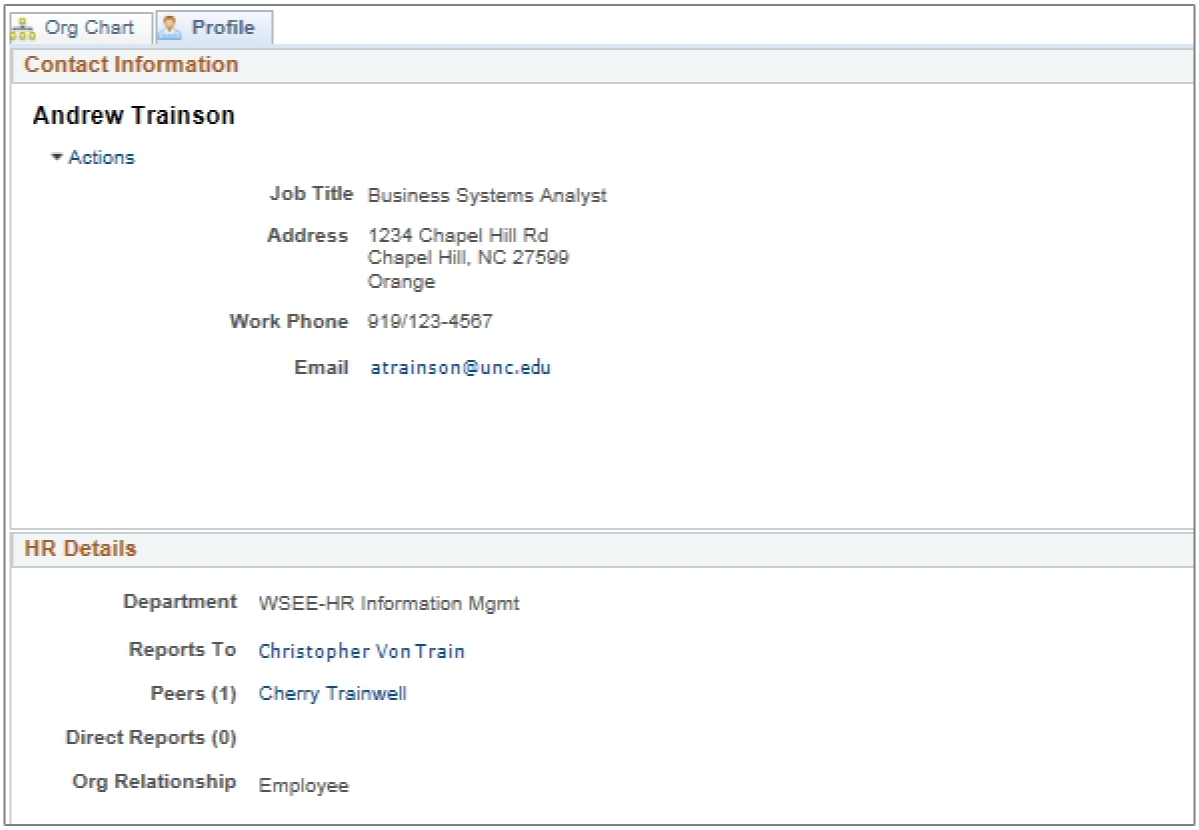


Result: The system displays the contact information and organizational details for the employee.

- If you need to export the org chart to Excel, skip to *Exporting the Org Chart to Excel, page 7*
- If you need to export the org chart to Visio, skip to *Exporting the Org Chart to Visio, page 8*
- If you need to see the org chart as a list, skip to *Seeing the Org Chart as a List, page 11*.

8. In the Contact Information and HR Details sections, you can see the following information about the employee:

This field:	**Shows:**
Job Title	The title that corresponds with the job code, not always the employee's working title.
Address	The business address for the employee.
Work Phone	The business phone number for the employee.
Email	The preferred business email address for the employee.
Department	The department associated with the job listed in the Contact Information section.
Reports To	The name of employee's supervisor, for the job listed in the Contact Information section.
Peers	The names of the employees who also report to the same supervisor.
Direct Reports	The names of any employees who report to the employee you've selected.
Org Relationship	• **Employee**, if the person has an employee classification or • **Contingent worker**, if the person is considered a contingent worker. **Note:** Affiliates, such as contractors, don't show in the org chart viewer.

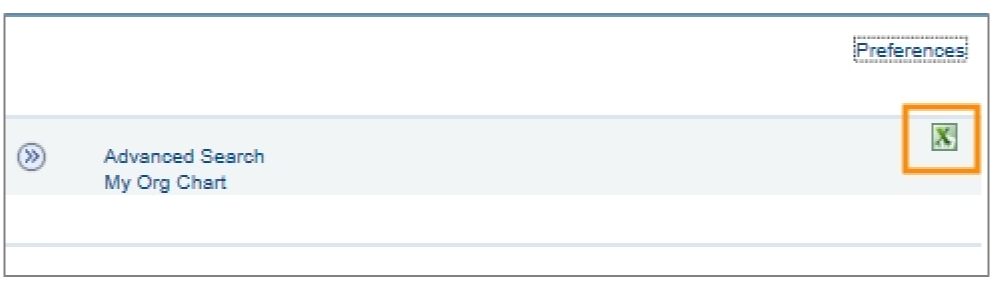


Exporting the Org Chart to Excel

If you need a list of email addresses for a department, you can export the Org Chart as a CSV file to use in Excel. Follow these steps to export the file.

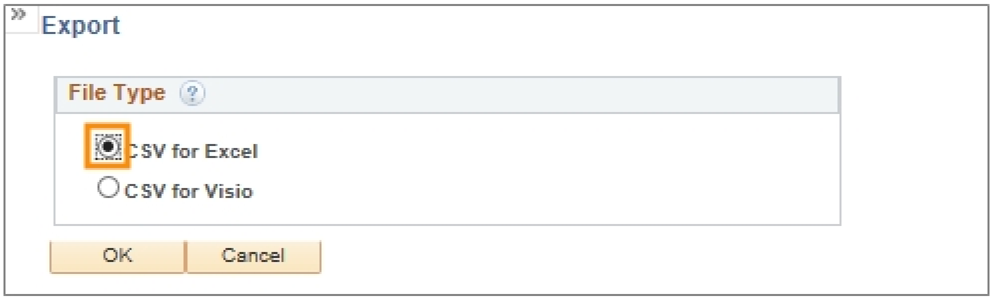
> **Note:** When you export to Excel, your results will have all of the people you see on the screen and the focus person's direct and indirect reports. The results don't contain the direct reports of the focus person's peers. If you need to see the peer's direct and indirect reports, move the focus up one level before you export.

1. On the Org Chart tab, click the green **Excel** icon on the top right.

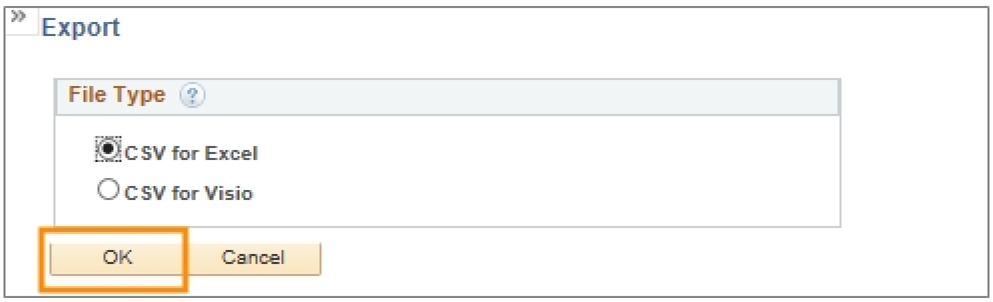


   Result: The system displays the Export page.

2. Mark the radio button next to **CSV for Excel**.



3. Click the **OK** button.



Result: The system displays the org chart page and a message at the bottom of the page asking if you want to open or save the file. Choose an option and continue in Excel.

Sample Excel file

	A	B	C	D	E	F
1	Name	Title	Department	Directs Repo	Email	
2	Christopher Von Train	Technology Support A	ITS - EA-Connect Car	2	Cvontrain@unc.edu	
3	Andrew Trainson	Business Systems Ana	WSEE-HR Informatic	0	atrainson@unc.edu	
4	Cherry Trainwell	Business Systems Ana	WSEE-HR Informatic	0	ctrainwell@unc.edu	
5						

Exporting the Org Chart to Visio

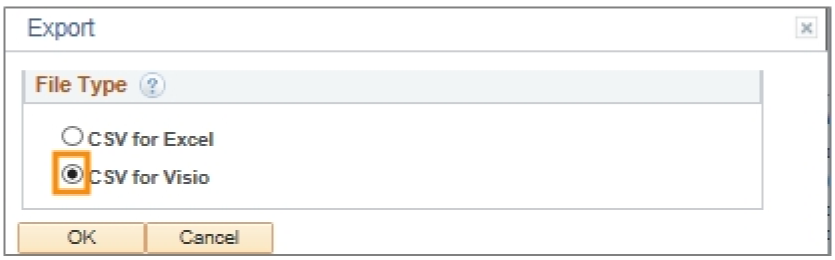
If you need an org chart to post on your departmental website, you can export the Org Chart as a CSV file to use in Visio. Follow these steps to export the file.

Note: When you export to Visio, your results will have all of the people you see on the screen and the focus person's direct and indirect reports. The results don't contain the direct reports of the focus person's peers. If you need to see the peer's direct and indirect reports, move the focus up one level before you export.

1. On the Org Chart tab, click the green **Excel** icon on the top right.

Result: The system displays the Export page.

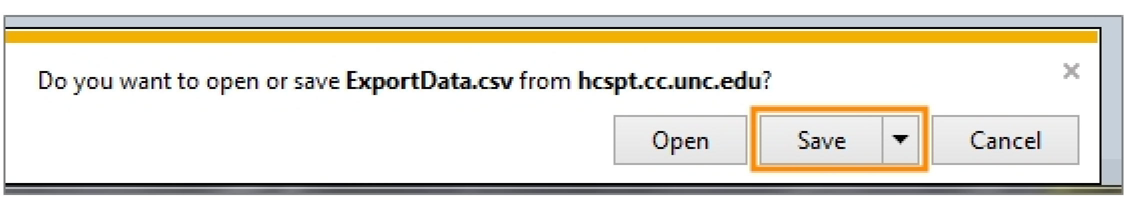
2. Mark the radio button next to **CSV for Visio**.



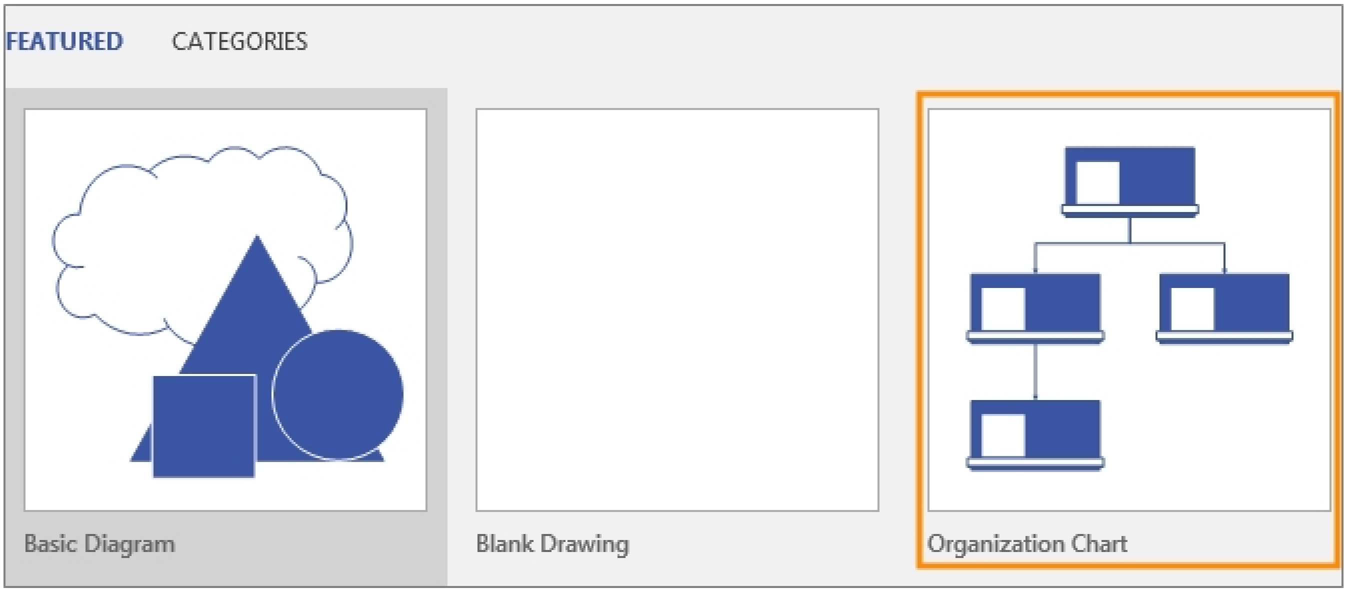
3. Click the **OK** button.

Result: The system displays the org chart page and a message at the bottom of the page asking if you want to open or save the file.

4. Click the Save button.

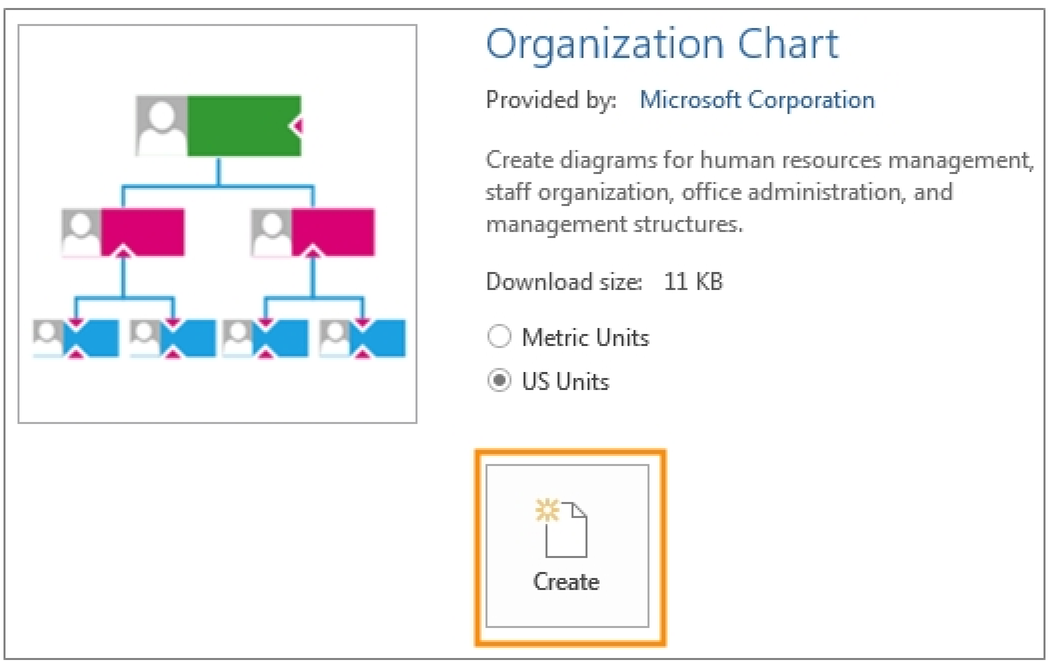


5. Open Visio and select **Organization Chart** from the templates.



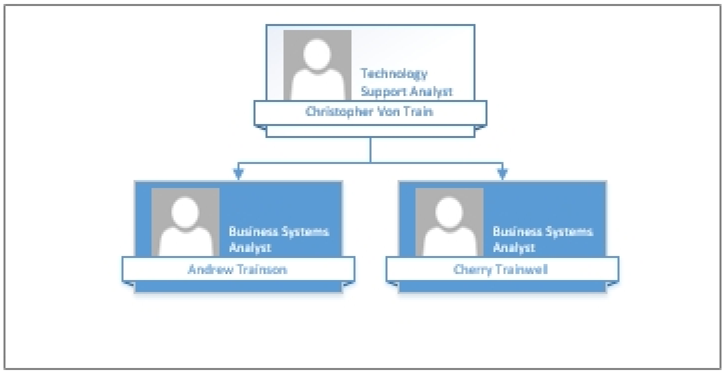
Result: The program displays a popup window for creating an Organization Chart.

6. Click the **Create** button.



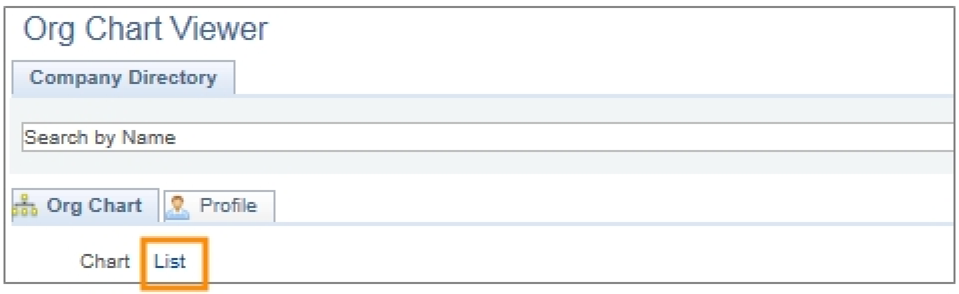
Result: The program displays a new drawing and the Organization Chart Wizard opens in a popup. Follow the on-screen instructions to import your save CSV file and create your org chart.

Sample Visio File



Seeing the Org Chart as a List

To see the org chart as a list view, click the **List** link on the top left of the page.



Result: The system displays the org chart as a list.

Sample Org Chart as a List

Chart | List

Company Directory

Display Org Chart for	Name	Actions	Title	Department
⊕	⊟ Christopher Von Train	▾ Actions	Technology Support Analyst	ITS - EA-Connect Carolina
⊕	Andrew Trainson	▾ Actions	Business Systems Analyst	WSEE-HR Information Mgmt
⊕	Cherry Trainwell	▾ Actions	Business Systems Analyst	WSEE-HR Information Mgmt

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Directs Reports Count	Email
2	cvontrain@unc.edu
0	atrainson@unc.edu
0	ctrainwell@unc.edu

Updating an Employee's Reporting Structure

Understanding Where a Supervisor's Information Is Displayed

ConnectCarolina displays an employee's supervisor in one of two ways, depending on whether the supervisor has a position. If the supervisor has a position, the supervisor's information is displayed in the Reports To field. If the supervisor doesn't have a position, the supervisor's information is displayed in the Supervisor ID field. The information below shows how to change where the supervisor's information is displayed.

> **Note:** All permanent and temporary SHRA and EHRA non-faculty employees must have positions. Faculty, EHRA Students, and secondary EHRA non-faculty appointments may or may not have positions.

Changing the Supervisor if the Supervisor Is in a Position

If you need to change the supervisor and the supervisor is in a position, submit an **Add / Update Position** ePAR and update the position number of the supervisor in the Reports To field.

> **Caution:** The system allows you to enter an inactive position. Therefore, be sure the Reports To position you enter is active.

Changing the Supervisor if the Supervisor Isn't in a Position

If you need to change the supervisor but the supervisor isn't in a position, submit an **Edit Existing Job** ePAR and update the PID in the Supervisor ID field.

> **Caution:** The system allows you to enter the PID of a supervisor who has yet to begin work. Because of this, be sure the effective date is on or after the Supervisor's hire date.

Changing from a Supervisor in a Position to a Supervisor who Isn't in a Position

If you need to change the supervisor from one who is in a position to a supervisor who isn't in a position, it's a two-step process. Be sure that you don't start the second step until the first ePAR executes.

1. Submit an **Add/Update Position** ePAR and remove the position number from the Reports To field.

2. After the Add/Update Position ePAR executes, submit an **Edit Existing Job ePAR** and add the Empl ID to the Supervisor ID field.

> **Important:** Use the same effective date on each ePAR.

Changing from a Supervisor who Isn't a Position to a Supervisor in a Position

If you need to change the supervisor from one who isn't in a position to a supervisor who is in a position, submit an **Add/Update Position** ePAR and add the position number to the Reports To field.

> **Note:** The system automatically removes the Supervisor ID when the ePAR executes.