



# Seeing Organizational Charts in ConnectCarolina

*March 2018*



## Our Presenters

- Jackie Treschl, ConnectCarolina Change Management
- Rajani Day, Senior HR Business Analyst, WSEE-HR Information Management

## Our Moderator

- Chris Minter, ConnectCarolina Change Management

# Webinar Format

- Presentation, followed by Q&A
- Use the chat window to type your questions
- We'll answer questions during the Q&A segment in the order they're received
- The webinar is being recorded and will be posted at [Ccinfo.unc.edu/hr-representatives](https://ccinfo.unc.edu/hr-representatives).

# Agenda

- Introduction of the New Feature, **Org Chart Viewer**
- Using the **Org Chart Viewer**
- Why Reporting Structure Matters
- What You Can Do

# Org Charts in ConnectCarolina

- New feature in ConnectCarolina
  - **HR WorkCenter > Org Chart Viewer**
- What can you do with it?
  - See the reporting structure for employees.
    - Can see both up and down.
    - Can change the focus of the org chart.
  - See email address, work phone number, and business address.
  - Export to Excel as a list.
  - Export to Visio as an org chart.



## A few things to keep in mind...

- The org charts show only **active employees** in the reporting structure.
  - Vacant positions aren't shown.
  - Inactive positions aren't shown.
- Say that an employee isn't in a position and reports to someone who isn't in a position. In the org chart, the employee will show as reporting to all of the supervisor's jobs.
- Currently, only **UNC-Chapel Hill** employees are included in the org charts.



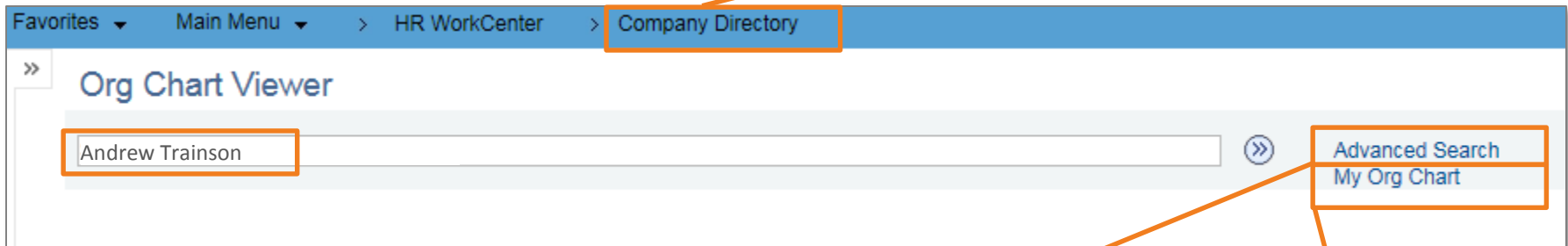
# Let's Take a Look

The screenshot shows the UNC HR Workcenter interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', and 'HR WorkCenter' (selected). Below this, the 'HR WorkCenter' header is visible. On the left, there is a sidebar with a tree view. The 'HR/Payroll' section is expanded, showing sub-items like 'Approve/Review Actions', 'ePAR Home Page', 'Hiring', 'PeopleAdmin', 'LawLogix', 'Find Existing PID', 'PID Search/Match', 'Add/update Education', 'Affiliate Request System', 'Job/Positions', 'Add/Update Position Info', 'Position History', 'Job Data', 'Multiple Jobs Summary', and 'Org Chart Viewer'. The 'Org Chart Viewer' link is highlighted with an orange box. On the right, the 'UNC HR Workcenter Status' section displays 'HR Hire currently available'. A double arrow icon is highlighted with an orange box, and a callout box points to it with the following text:

**Tip:** After you click the Org Chart Viewer link, click the double arrow to close the HR WorkCenter so you have more space to see the org charts.

# Searching for an Org Chart

Company Director is the  
**Org Chart Viewer**.



The screenshot shows a web application interface. At the top is a blue navigation bar with the following items: 'Favorites' with a dropdown arrow, 'Main Menu' with a dropdown arrow, '> HR WorkCenter', and '> Company Directory' which is highlighted with an orange box. Below the navigation bar is a white header area with a double-right arrow icon and the text 'Org Chart Viewer'. Underneath the header is a search bar containing the text 'Andrew Trainson', which is also highlighted with an orange box. To the right of the search bar is a double-right arrow icon. Further right is a button with the text 'Advanced Search' and 'My Org Chart' stacked vertically, which is highlighted with an orange box. Two orange lines with arrowheads point from the callout boxes to the 'Company Directory' menu item and the 'Advanced Search' button.

Click Advanced Search to search  
for employees by location,  
department, or other criteria.

Click My Org Chart to  
see an org chart with  
you as the focus.



# Seeing the Org Chart

**Org Chart Viewer**References

Search by Name » [Advanced Search](#)  
[My Org Chart](#)

**Org Chart** **Profile**

[Chart](#) | [List](#)

+

—

**Joanne Trainberg**  
Manager  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 3  
[jtrainberg@unc.edu](#)  
▼ **Actions**

**Aakash Le Train**  
Accounting Technician  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 0  
[aletrain@unc.edu](#)  
▼ **Actions**

**Andrew Trainson**  
Accountant  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 3  
[atrainson@unc.edu](#)  
▼ **Actions**

**William Trainwell**  
Accountant  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 1  
[wtrainwell@unc.edu](#)  
▼ **Actions**

**Sunny Trainlett**  
Accounting Technician  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 0  
[Sunny\\_trainlett@unc.edu](#)  
▼ **Actions**

**Lorraine Trainova**  
Accounting Technician  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 0  
[ltrainova@unc.edu](#)  
▼ **Actions**

**Nur Von Train**  
Accounting Technician  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 0  
[Nur\\_vontrain@unc.edu](#)  
▼ **Actions**

Connect  
CAROLINA  
iNFOPORTE

# Changing the Focus

**Org Chart Viewer**Preferences

Search by Name Advanced Search  
My Org Chart

**Org Chart** **Profile**

Chart | List

**Joanne Trainberg**  
Manager  
Org Chart  
Department: Nutritional Science  
Directs: 3  
jtrainberg@unc.edu  
▼ Actions

**Aakash Le Train**  
Accounting Technician  
Org Chart  
Department: Nutritional Science  
Directs: 0  
aletrain@unc.edu  
▼ Actions

**William Trainwell**  
Accountant  
Org Chart  
Department: Nutritional Science  
Directs: 1  
wtrainwell@unc.edu  
▼ Actions


**Andrew Trainson**  
Accountant  
Org Chart  
Department: Nutritional Science  
Directs: 3  
atrainson@unc.edu  
▼ Actions


**James Trainek**  
Accounting Technician  
Org Chart  
Department: Nutritional Science  
Directs: 0  
jtrainek@unc.edu  
▼ Actions

# Seeing the Employee's Profile

[»](#) **Org Chart Viewer** [References](#)

[»](#) [Advanced Search](#)  
[My Profile](#)

 **Org Chart**

 **Profile**

**Contact Information**

**William Trainwell**  
▼ Actions

**Job Title** Accountant

**Address** 123 Tar Heel Way  
Chapel Hill, NC 27516

**Work Phone** 919-962-5555

**Email** [wtrainwell@unc.edu](mailto:wtrainwell@unc.edu)

**HR Details**

**Department** Nutritional Science

**Reports To** [Joanne Doogletrain](#)

**Peers (2)** [Aakash LeTrain](#), [Andrew Trainson](#)

**Direct Reports (1)** [James Trainek](#)

**Org Relationship** Employee

# Seeing the Org Chart

» Org Chart Viewer Preferences

Search by Name ⌕ Advanced Search  
My Org Chart ✕

Org Chart Profile

Chart List

```
graph TD; Joanne[Joanne Trainberg  
Manager  
Org Chart  
Department: Nutritional Science  
Directs: 3  
jtrainberg@unc.edu  
Actions] --> Aakash[Aakash Le Train  
Accounting Technician  
Org Chart  
Department: Nutritional Science  
Directs: 0  
aletrain@unc.edu  
Actions]; Joanne --> William[William Trainwell  
Accountant  
Org Chart  
Department: Nutritional Science  
Directs: 1  
wtrainwell@unc.edu  
Actions]; Joanne --> Andrew[Andrew Trainson  
Accountant  
Org Chart  
Department: Nutritional Science  
Directs: 3  
atrainson@unc.edu  
Actions]; William --> James[James Trainek  
Accounting Technician  
Org Chart  
Department: Nutritional Science  
Directs: 0  
jtrainek@unc.edu  
Actions];
```

**Joanne Trainberg**  
Manager  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 3  
jtrainberg@unc.edu  
**Actions**

**Aakash Le Train**  
Accounting Technician  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 0  
aletrain@unc.edu  
**Actions**

**William Trainwell**  
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[Org Chart](#)  
Department: Nutritional Science  
Directs: 1  
wtrainwell@unc.edu  
**Actions**

**Andrew Trainson**  
Accountant  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 3  
atrainson@unc.edu  
**Actions**

**James Trainek**  
Accounting Technician  
[Org Chart](#)  
Department: Nutritional Science  
Directs: 0  
jtrainek@unc.edu  
**Actions**

# Seeing the Org Chart as a List

»

Org Chart Viewer

Preferences

»

Advanced Search  
My Org Chart

Org Chart

Profile

Chart | List

List View

1-5 of 5

# Exporting the Org Chart to Excel

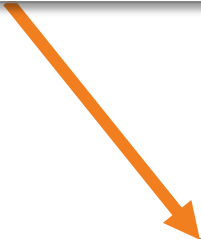
>> Export

File Type ?

☒ CSV for Excel

☐ CSV for Visio

OK Cancel



	A	B	C	D	E	F	G	H
1	Name	Title	Department	Directs Re	Email			
2	Joanne Doogletrain	Manager	Nutritional Science	3	jdoogletrain@unc.edu_UNC_UNC			
3	William Trainwell	Accountant	Nutritional Science	1	wtrainwell@unc.edu_UNC_UNC			
4	Aakash LeTrain	Accounting Technician	Nutritional Science	0	aletrain@unc.edu_UNC_UNC			
5	Andrew Trainson	Manager	Nutritional Science	3	atrainson@unc.edu_UNC_UNC			
6	James Trainek	Accounting Technician	Nutritional Science	0	jtrainek@unc.edu_UNC_UNC			
7								

# Exporting the Org Chart to Visio

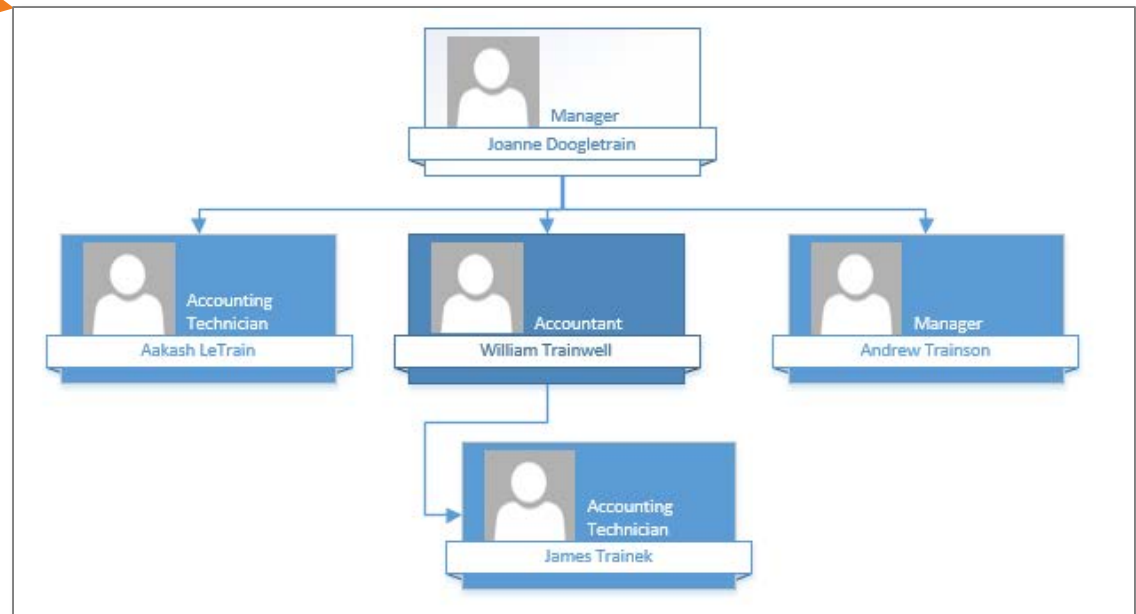
» Export

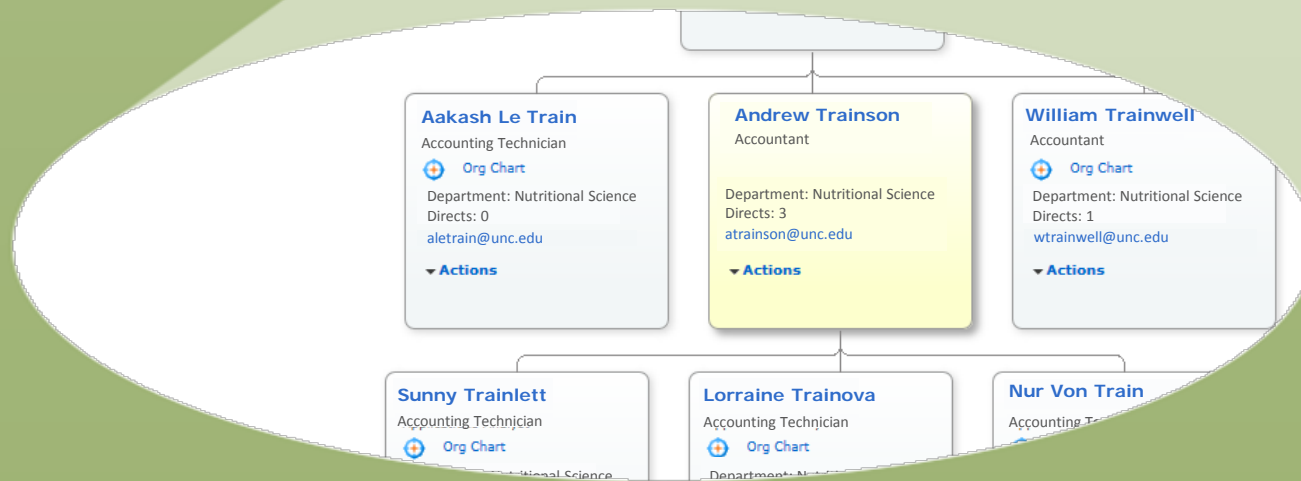
File Type ?

☐ CSV for Excel

☒ CSV for Visio

OK Cancel







# Why Reporting Structure Matters

If a reporting structure isn't correct, that means:

- The employee's manager:
  - Can't enter the employee's performance rating.
  - Can't see performance documents and training records for the employee.
  - Doesn't receive notifications when the employee enrolls in or cancels a training session in ConnectCarolina.
  - Doesn't see the employee listed on the Employees tab in InfoPorte.
- The wrong person:
  - Has access to see the employee's performance rating and training records.
  - Sees the employee listed on the Employees tab in InfoPorte, including bio-demo information!

# Why Reporting Structure Matters

If a reporting structure isn't correct, that means:

- It's possible that an employee may not be seen in the ConnectCarolina Organizational Charts.
- The Organization display in Microsoft Outlook is incorrect.
- ConnectCarolina notifies the wrong supervisor when an employee enrolls in or cancels a training session.

# What You Can Do

1. Look over your org charts to be sure they look the way you expect.
2. If they don't, look in the **employee's job record** for these scenarios:
  - A supervisor who is inactive in ConnectCarolina.
  - The employee is reporting to the supervisor's secondary job.
  - Blank SUPERVISOR\_ID and REPORTS\_TO fields.
  - The supervisor is in a position, but the SUPERVISOR\_ID field is filled in instead of the REPORTS\_TO field.
  - The supervisor is a temporary employee.
  - The REPORTS\_TO field is a position:
    - With more than one incumbent, or
    - That is inactive, or
    - That is a temporary position.
  - The employee and supervisor relationship is caught in a loop (that is, the employee reports to the supervisor and the supervisor reports to the employee).



# What You Can Do

3. Make changes in ConnectCarolina by submitting the correct ePAR:
  - Use the Add/Update Position ePAR to change the REPORTS\_TO field (if the supervisor is in a position)
  - Use Edit Existing Job ePAR to change the SUPERVISOR\_ID (if the supervisor doesn't have a position)

**Note:** You may have to submit more than one ePAR based on your scenario, refer to the *Working with Org Charts and Reporting Structures* mini-guide on [CCinfo.unc.edu](http://CCinfo.unc.edu) for more information.

4. After the ePAR has executed, check your org charts the next day to make sure they look the way you expect.





# For More Information



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