



**Texas Skyward User Group Conference**

# **Creating and Maintaining the Organizational Chart**

**Samantha Kollman**



# Creating and Maintaining the Org Chart



Organizational charts are the basis for many features that help your district function more efficiently. This session shows how to create and maintain this important information.

- Building an Org Chart using Employee Management
- Adding a new Org Chart from scratch
- Editing an existing Org Chart
- Options available within the Org Chart

## Org Chart main screen

Organizational Charts - WHEP\OC - 10041 - 05.14.06.00.08 - Internet Explorer

Skyward School District India Shimmusscr Account Preferences Exit ?

Home Employee Administration Payroll Time Off Substitute Tracking TrueTime Advanced Features Federal/State Reporting Custom Reports

**Organizational Charts** ☆ (197) Print Favorites New Window My Print Queue

Views: Organizational Charts Filters: \*Skyward Default Print

Organization Chart Name	Used in True Time	Used in Time Off	Used in Work Requests	Used in New Hire Requests	Used in Prof Devel Requests	Used in Reimbursements
▶ Test Org Chart						
▶ TIME OFF ORG CHART		Y				
▶ TRUE TIME ORG CHART	Y					

Add  
Edit  
Delete  
Clone  
Notes  
Attach  
Build Org Chart from EM plan

20 3 records displayed Org Chart Name:  ABC

## Build Org Chart from EM Plan

Build Org Chart from EM Plan - WHNEP\OC - 10041 - 05.14.06.00.08 - Internet Explorer

### Build Org Chart from EM Plan (71)

**Build New Org Chart**

\* Org Chart Name:

Description:

Require only one level of approval for TrueTime timesheets.  
 Allow all employees to modify their True Time transactions.

\* Employee Management Plan to build org chart from:

\* Name of employee at top of org chart:

**Select Parameters**

<a href="#">Select Positions</a>	<a href="#">Select Assignments</a>	<a href="#">Select Employee Types</a>
*All Positions	*All Assignments	*All Employee Types

Asterisk (\*) denotes a required field

This option pulls from the Supervisor field on each Employee Management Assignment.

Assignment Maintenance - WHVAD\EM\AS\AS - 27362 - 05.14.06.00.08 - Internet Explorer

### Assignment Maintenance (396)

**Assignment Details**

\* Employee: Aitchisonscr Jacqueline G

Plan: 2014-2015 EMS Plan

Position: TRANSPORTATION [Edit Pos Control](#)

Assignment: BUS MONITOR 2 ROUTES 4HR

Building: BUILDING -TRANS

	Per Diem Contract	Calculated Contract
Main Asn	\$9,643.02	\$9,643.02
Add-ons	\$0.00	\$0.00
<b>Total</b>	<b>\$9,643.02</b>	<b>\$9,643.02</b>

[Back](#)

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**Assignment Details**

\* Assign Date: 08/23/2010 [Edit](#)

Position: TRANSPORTATION | TRANSP | Group: |

\* Assignment: BUS MONITOR 2 ROUTES 4HR | BUSM2 | Job Type: BUS DRIVER/MONITOR - PG 1 | BUSDR

Building: BUILDING -TRANS | TRANS | Grade From: |

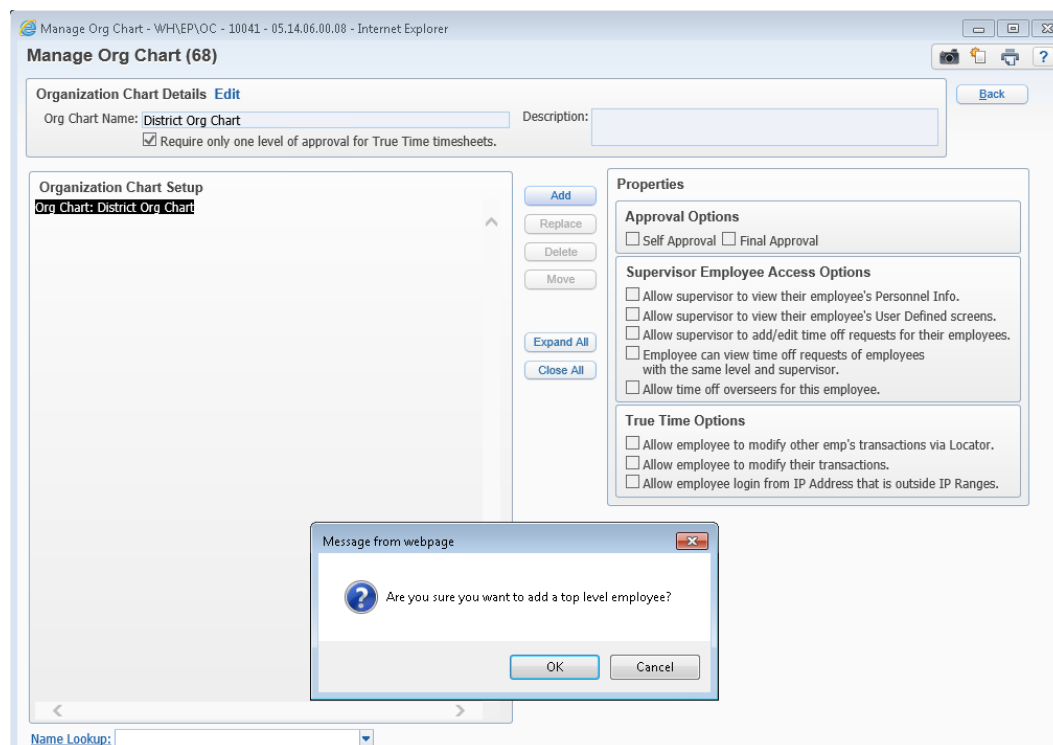
Department: | | Grade To: |

Supervisor: Jinesscr Rosetta P | JINESROS001

Asterisk (\*) denotes a required field



## Add the Top Level Employee



Manage Org Chart - WH\EP\OC - 10041 - 05.14.06.00.08 - Internet Explorer

### Manage Org Chart (68)

Organization Chart Details [Edit](#) [Back](#)

Org Chart Name:  Description:

Require only one level of approval for True Time timesheets.

#### Organization Chart Setup

Org Chart: District Org Chart

[Add](#) [Replace](#) [Delete](#) [Move](#)

[Expand All](#) [Close All](#)

#### Properties

##### Approval Options

Self Approval  Final Approval

##### Supervisor Employee Access Options

Allow supervisor to view their employee's Personnel Info.  
 Allow supervisor to view their employee's User Defined screens.  
 Allow supervisor to add/edit time off requests for their employees.  
 Employee can view time off requests of employees with the same level and supervisor.  
 Allow time off overseers for this employee.

##### True Time Options

Allow employee to modify other emp's transactions via Locator.  
 Allow employee to modify their transactions.  
 Allow employee login from IP Address that is outside IP Ranges.

Message from webpage

Are you sure you want to add a top level employee?

[OK](#) [Cancel](#)

Name Lookup:

## Add the Top Level Employee

Add Employee - WH\EP\OC - 10041 - 05.14.06.00.08 - Internet Explorer

### Add Employee (68)

Org Chart Hierarchy Save Back

Select Employee(s) to Add at Top Level  
 Individual  Mass  
\* Employee: Pilotscr Phillip W PILOTPHI001

Approval Options  
 Self Approval  Final Approval

Supervisor Employee Access Options  
 Allow supervisor to view Personnel Info of employee below supervisor's level.  
 Allow supervisor to view User Defined screens of employee below supervisor's level.  
 Allow supervisor to add and edit time off requests for employees below supervisor's level.  
 Employee can view time off requests of employees with the same level and supervisor.  
 Allow time off overseers for this employee.  
The selected overseers will be able to see time off entries on their calendars for Top Level's employees.  
[Select Overseers:](#) \*No Overseers

True Time Options  
 Allow employee to modify other employee's transactions via the Employee Locator.  
 Allow employee to modify their transactions.  
 Allow employee to login from an IP Address that is not within the set IP ranges.

Asterisk (\*) denotes a required field



Continue Building the Org Chart – can add employees Individually or using the Mass process

Add Employee - WH\EP\OC - 10041 - 05.14.06.00.08 - Internet Explorer

### Add Employee (70)

Org Chart Hierarchy  
Pilotscr, Phillip W [PILOTPHI001]

Select Employee(s) to Add under Pilotscr, Phillip W  
 Individual  Mass  
 \* Employee:

Approval Options  
 Self Approval  Final Approval

Supervisor Employee Access Options  
 Allow supervisor to view Personnel Info of employee below supervisor's level.  
 Allow supervisor to view User Defined screens of employee below supervisor's level.  
 Allow supervisor to add and edit time off requests for employees below supervisor's level.  
 Employee can view time off requests of employees with the same level and supervisor.  
 Allow time off overseers for this employee.  
 The selected overseers will be able to see time off entries on their calendars for Pilotscr, Phillip W's employees.  
 Select Overseers: \*No Overseers

True Time Options  
 Allow employee to modify other employee's transactions via the Employee Locator.  
 Allow employee to modify their transactions.  
 Allow employee to login from an IP Address that is not within the set IP ranges.

Asterisk (\*) denotes a required field

## Options to Replace, Delete and Move employees.

Manage Org Chart - WHEP\OC - 10041 - 05.14.06.00.08 - Internet Explorer

### Manage Org Chart (72)

Organization Chart Details [Edit](#) [Back](#)

Org Chart Name:  Description:

Require only one level of approval for True Time timesheets.

#### Organization Chart Setup

Org Chart: District Org Chart

- [-] Pilotscr, Phillip W
- Ackerleyscr, Johanne P**
- Arbeitecr, Mariam A
- Aubertscr, Cody A
- Benwarescr, Daryl B
- Bucholtzscr, Jean H
- Calcagniscr, Delia I
- Carewscr, Rochelle I
- Chojnackiscr, Eileen I
- Currencecr, Hector I
- Davillascr, Tami J
- Edmistenscr, Therese K
- Ethingtonscr, Kathlyn K
- Fenstermakerscr, Zane L
- Fischscr, Carmen L
- Forgionescr, Vida L
- Guardiolascr, Nicholas I
- Heyenscr, Clifton R
- Irliscr, Derrick O
- Jaquascr, Blanca P
- Julioscr, Marissa P
- Kimreyscr, Regan N
- Mangerscr, Tamika T
- Mendoza, Stella
- Mielesscr, Ruben I
- Muckscr, Cynthia N
- Nachmanscr, Harrison K
- NELSONSCR, BROOK

[Add](#)

[Replace](#)

[Delete](#)

[Move](#)

[Expand All](#)

[Close All](#)

#### Properties for Ackerleyscr, Johanne P [Edit](#)

Org Chart Level: 1-1

##### Approval Options

Self Approval  Final Approval

##### Supervisor Employee Access Options

Allow supervisor to view their employee's Personnel Info.

Allow supervisor to view their employee's User Defined screens.

Allow supervisor to add/edit time off requests for their employees.

Employee can view time off requests of employees with the same level and supervisor.

Allow time off overseers for this employee.

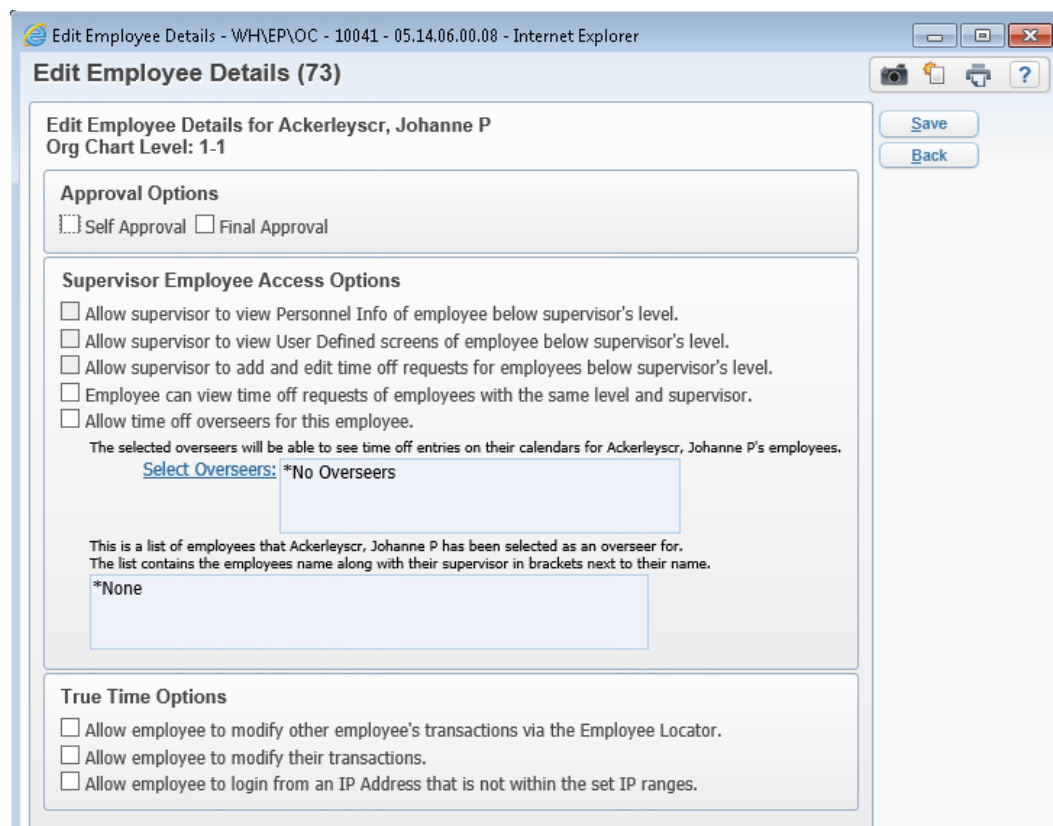
##### True Time Options

Allow employee to modify other emp's transactions via Locator.

Allow employee to modify their transactions.

Allow employee login from IP Address that is outside IP Ranges.

Additional Options available under Properties for each employee.



Edit Employee Details (73)

Edit Employee Details for Ackerleyscr, Johanne P  
Org Chart Level: 1-1

**Approval Options**  
 Self Approval  Final Approval

**Supervisor Employee Access Options**

- Allow supervisor to view Personnel Info of employee below supervisor's level.
- Allow supervisor to view User Defined screens of employee below supervisor's level.
- Allow supervisor to add and edit time off requests for employees below supervisor's level.
- Employee can view time off requests of employees with the same level and supervisor.
- Allow time off overseers for this employee.

The selected overseers will be able to see time off entries on their calendars for Ackerleyscr, Johanne P's employees.  
[Select Overseers](#): \*No Overseers

This is a list of employees that Ackerleyscr, Johanne P has been selected as an overseer for.  
The list contains the employees name along with their supervisor in brackets next to their name.  
\*None

**True Time Options**

- Allow employee to modify other employee's transactions via the Employee Locator.
- Allow employee to modify their transactions.
- Allow employee to login from an IP Address that is not within the set IP ranges.

Save  
Back





Texas Skyward User Group Conference

**THANK YOU FOR ATTENDING!**

