



Texas Skyward User Group Conference

Creating and Maintaining the Organizational Chart

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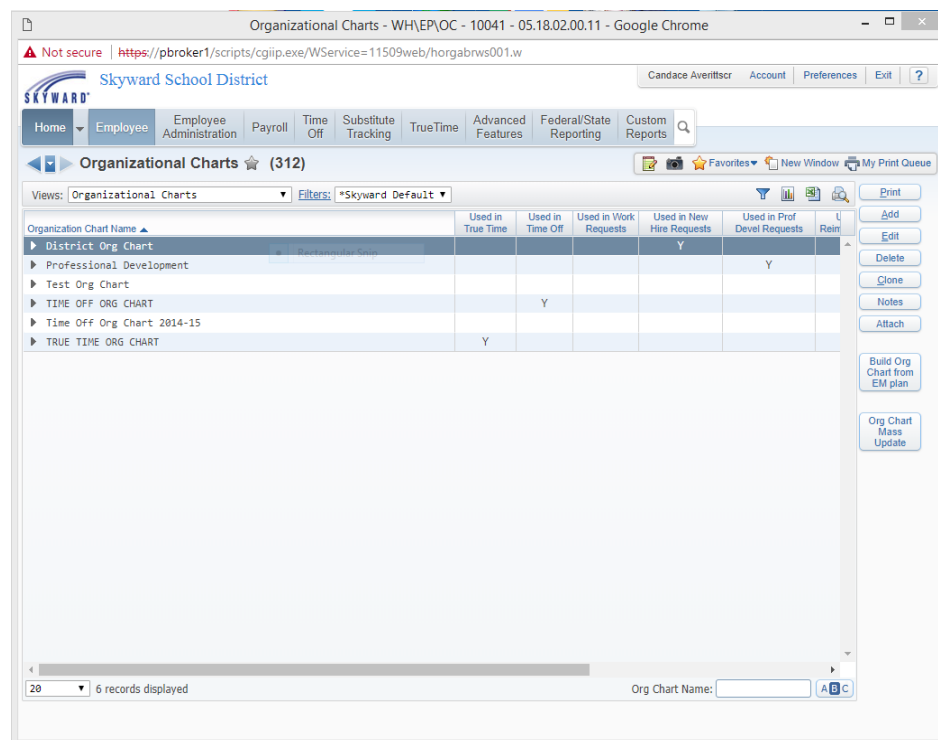
HR/PR Configurations and Codes



This session will discuss creation and maintenance of Organizational Charts. Organizational charts are the basis for many features that help your district function more efficiently.

- **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 - WH\EP\OC - 10041 - 05.18.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/horgabnws001.w

Skyward School District

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

Organizational Charts (312)

Views: Organizational Charts Filters: *Skyward Default

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	Rein
▶ District Org Chart				Y		
▶ Professional Development					Y	
▶ Test Org Chart						
▶ TIME OFF ORG CHART		Y				
▶ Time Off Org Chart 2014-15						
▶ TRUE TIME ORG CHART	Y					

20 6 records displayed

Org Chart Name:

Build Org Chart from EM Plan

Build Org Chart from EM Plan - WH\EP\OC - 10041 - 05.18.02.00.11 - Google Chrome

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Build Org Chart from EM Plan (110)

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

Select Positions	Select Assignments	Select Employee Types
*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 - WH\AD\EM\AS\AS - 27362 - 05.18.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/hemmgedit007.w?vHpmasId=130778&ViewMode=edit&isPopup=true

Assignment Maintenance (803)

Assignment Details

Salary Information

Payroll Information

Additional Pay Codes

Breakdown

Add-ons

*** Employee:** Amodeoscr Gabrielle G

Plan: 2009-2010 EMPL MGMT PLAN 8/30/

Position: TEACHER [View Pos Control](#)

Assignment: HIGH SCHOOL

Building: BUILDING -WHS

	Per Diem Contract	Calculated Contract
Main Asn	\$45,700.00	\$45,700.00
Add-ons	\$0.00	\$0.00
Total	\$45,700.00	\$45,700.00

Assignment Details

* Assign Date: 08/14/2008

Position: TEACHER TEACH Group:

* Assignment: HIGH SCHOOL HS Job Type:

Building: BUILDING -WHS WHS Grade From:

Department: FINE ARTS FA Grade To:

Supervisor: Ackerleyscr Johanne P ACKERJOH001

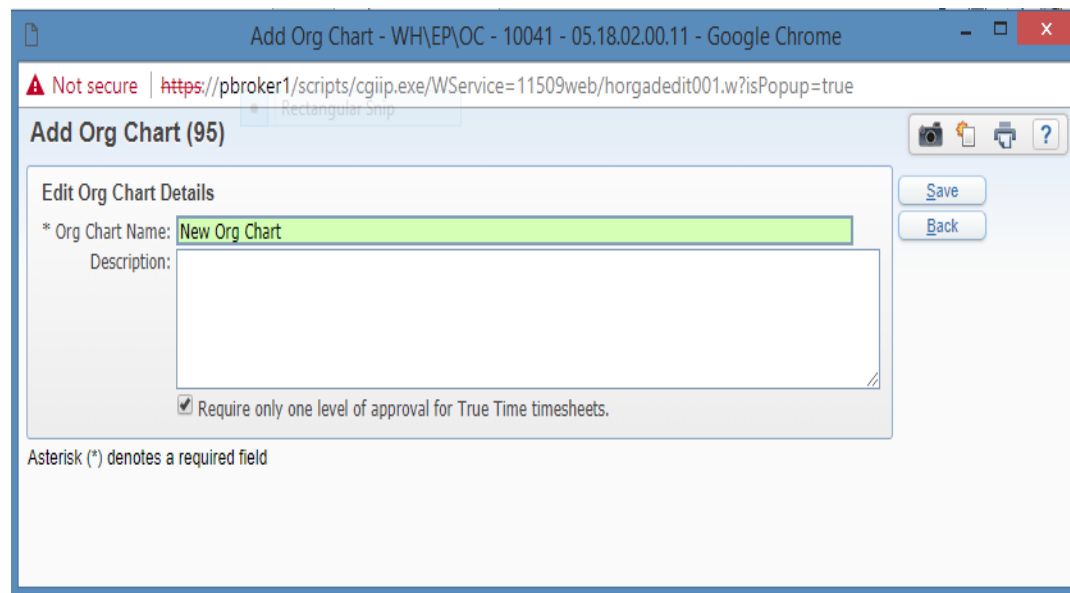
Save

Save and Continue to Next Tab

Cancel

Asterisk (*) denotes a required field

Add a new Org Chart



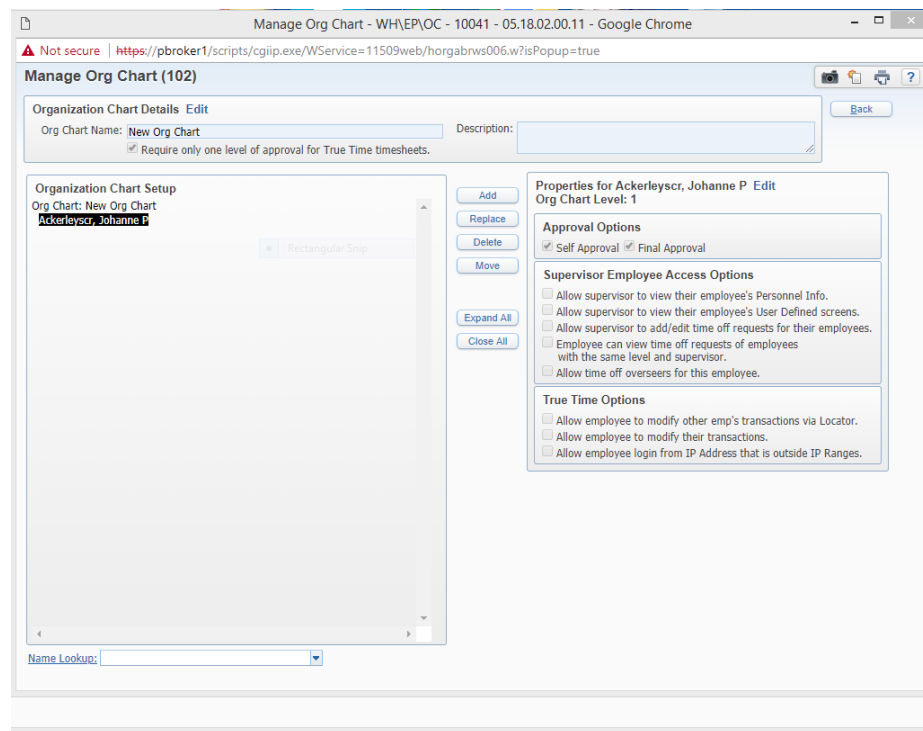
The screenshot shows a web browser window titled "Add Org Chart - WH\EP\OC - 10041 - 05.18.02.00.11 - Google Chrome". The address bar shows a URL starting with "https://pbroker1/scripts/cgiip.exe/WService=11509web/horgadedit001.w?isPopup=true". The page title is "Add Org Chart (95)".

The form is titled "Edit Org Chart Details" and contains the following fields and controls:

- * Org Chart Name: (highlighted in green)
- Description:
- Require only one level of approval for True Time timesheets.

Buttons for "Save" and "Back" are located on the right side of the form. A note at the bottom states: "Asterisk (*) denotes a required field".

Add the Top Level Employee



The screenshot shows a web browser window titled "Manage Org Chart - WH\EP\OC - 10041 - 05.18.02.00.11 - Google Chrome". The address bar shows a URL starting with "https://pbroker1/scripts/cgiip.exe/WService=11509web/horgabrws006.w?isPopup=true". The main content area is titled "Manage Org Chart (102)".

At the top, there is a section for "Organization Chart Details" with an "Edit" link. It includes a text input for "Org Chart Name" containing "New Org Chart" and a "Description:" field. A checkbox labeled "Require only one level of approval for True Time timesheets." is checked.

Below this is the "Organization Chart Setup" section, showing "Org Chart: New Org Chart" and a list of employees. The first employee listed is "Ackerleyscr, Johanne P". To the right of the list are buttons for "Add", "Replace", "Delete", and "Move". Below the list are buttons for "Expand All" and "Close All".

At the bottom left of the setup area is a "Name Lookup:" dropdown menu.

On the right side, there is a "Properties for Ackerleyscr, Johanne P" section with an "Edit" link. It shows "Org Chart Level: 1" and three sub-sections of options:

- 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.

Add appropriate attributes to the Top Level Employee

Add Employee - WH\EP\OC - 10041 - 05.18.02.00.11 - Google Chrome

Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/horgaedit012.w?isPopup=true>

Add Employee (102)

Org Chart Hierarchy

Select Employee(s) to Add at Top Level

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 Top Level's employees.

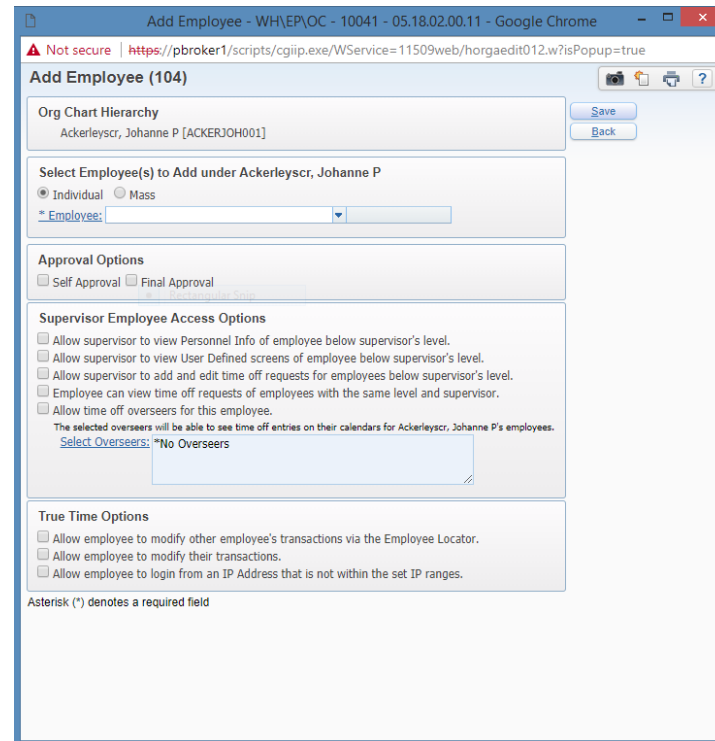
Select Overseers:

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 - 05.18.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/horgaedit012.w?isPopup=true

Add Employee (104)

Org Chart Hierarchy
Ackerleyscr, Johanne P [ACKERJOH001] Save Back

Select Employee(s) to Add under Ackerleyscr, Johanne P
 Individual Mass
* Employee:

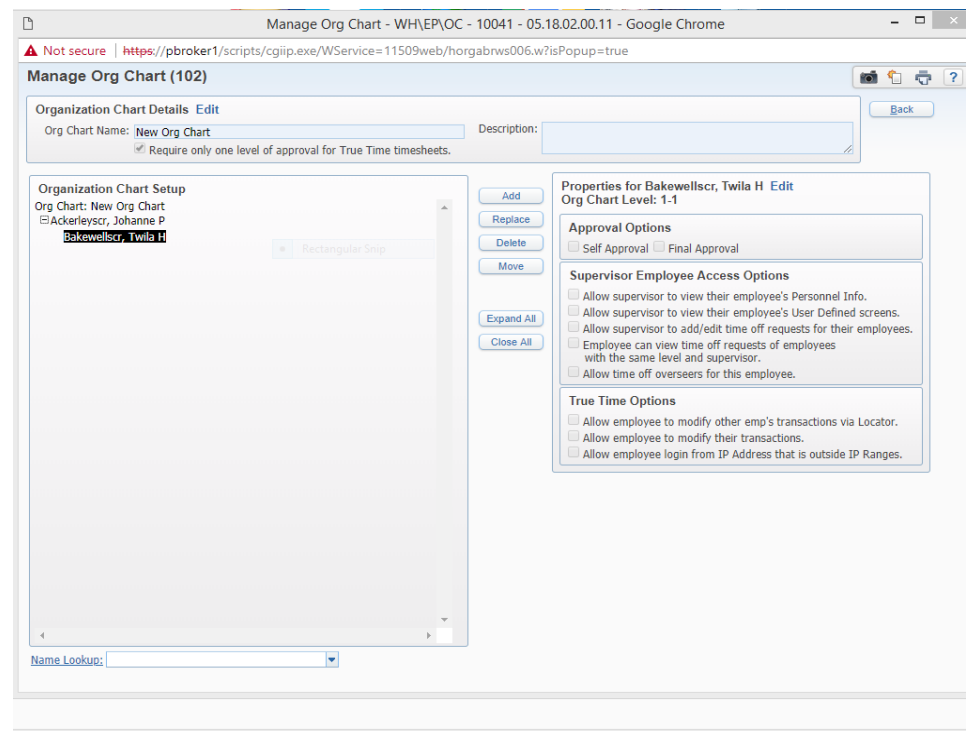
Approval Options
 Self Approval Final Approval

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 Ackerleyscr, Johanne P'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



The screenshot shows a web browser window titled "Manage Org Chart - WH\EP\OC - 10041 - 05.18.02.00.11 - Google Chrome". The address bar shows a URL starting with "https://pbroker1/scripts/cgiip.exe/WService=11509web/horgabrws006.w?isPopup=true".

The main content area is titled "Manage Org Chart (102)" and contains the following sections:

- Organization Chart Details Edit:** Includes a text field for "Org Chart Name: New Org Chart", a "Description:" field, and a checked checkbox for "Require only one level of approval for True Time timesheets." A "Back" button is located to the right.
- Organization Chart Setup:** Shows a tree view with "Org Chart: New Org Chart" expanded to show "Ackerleyscr, Johanne P" and "Bakewellsc, Twila H". A "Rectangular Snip" tool is visible over the tree.
- Properties for Bakewellsc, Twila H Edit (Org Chart Level: 1-1):** Contains several sections of checkboxes:
 - 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.
- Buttons:** A vertical column of buttons includes "Add", "Replace", "Delete", "Move", "Expand All", and "Close All".
- Name Lookup:** A dropdown menu is located at the bottom left of the interface.

Additional options available under Properties for each employee.

Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/horgaedit004.w?isPopup=true>

Edit Employee Details (107)

Edit Employee Details for Bakewellscsr, Twila H
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 Bakewellscsr, Twila H's employees.
Select Overseers: "No Overseers"

This is a list of employees that Bakewellscsr, Twila H 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.



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THANK YOU FOR ATTENDING!

