



NC ORG CHARTS OVERVIEW

JOB AID OM-3



Purpose

The purpose of this job aid is to give an overview of the NC Org which integrates with SAP to create Organizational Charts.

This Job Aid will describe the basic functions and features of NC Org Charts and will instruct how to:

- Access and manipulate organizational charts through the Chart Module.
- Search for records using the Directory Module.

Introduction and Overview

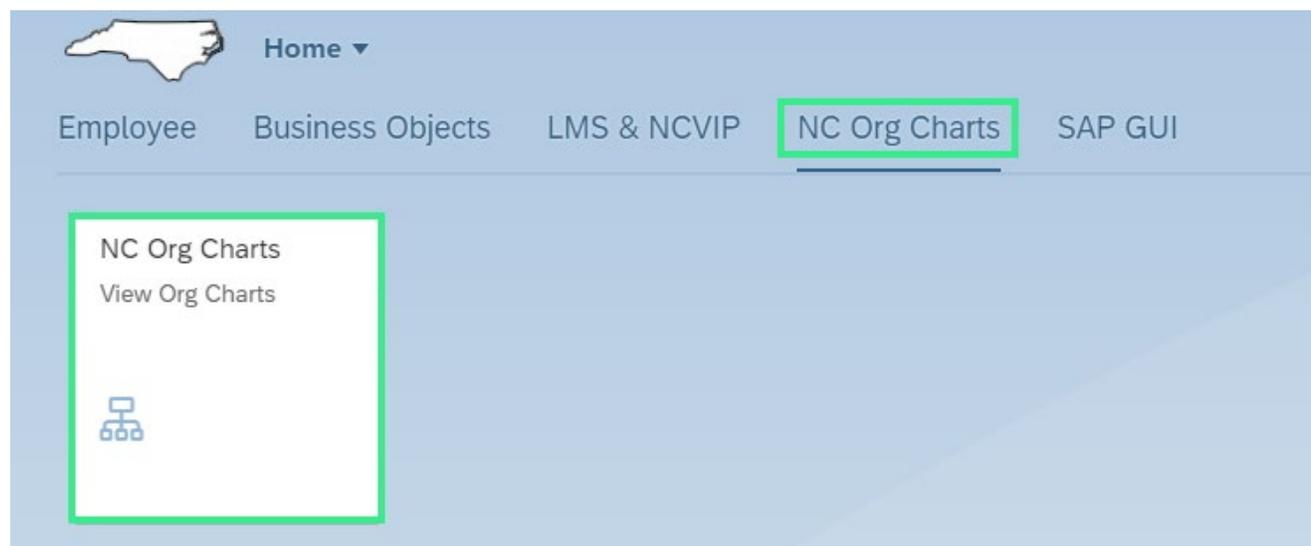
NC Org Charts integrates with SAP to create organizational charts for team collaboration, workforce planning, and critical decision making.

NC Org Charts can provide up-to-date data in an easy-to-read format to help your organization in many ways including to:

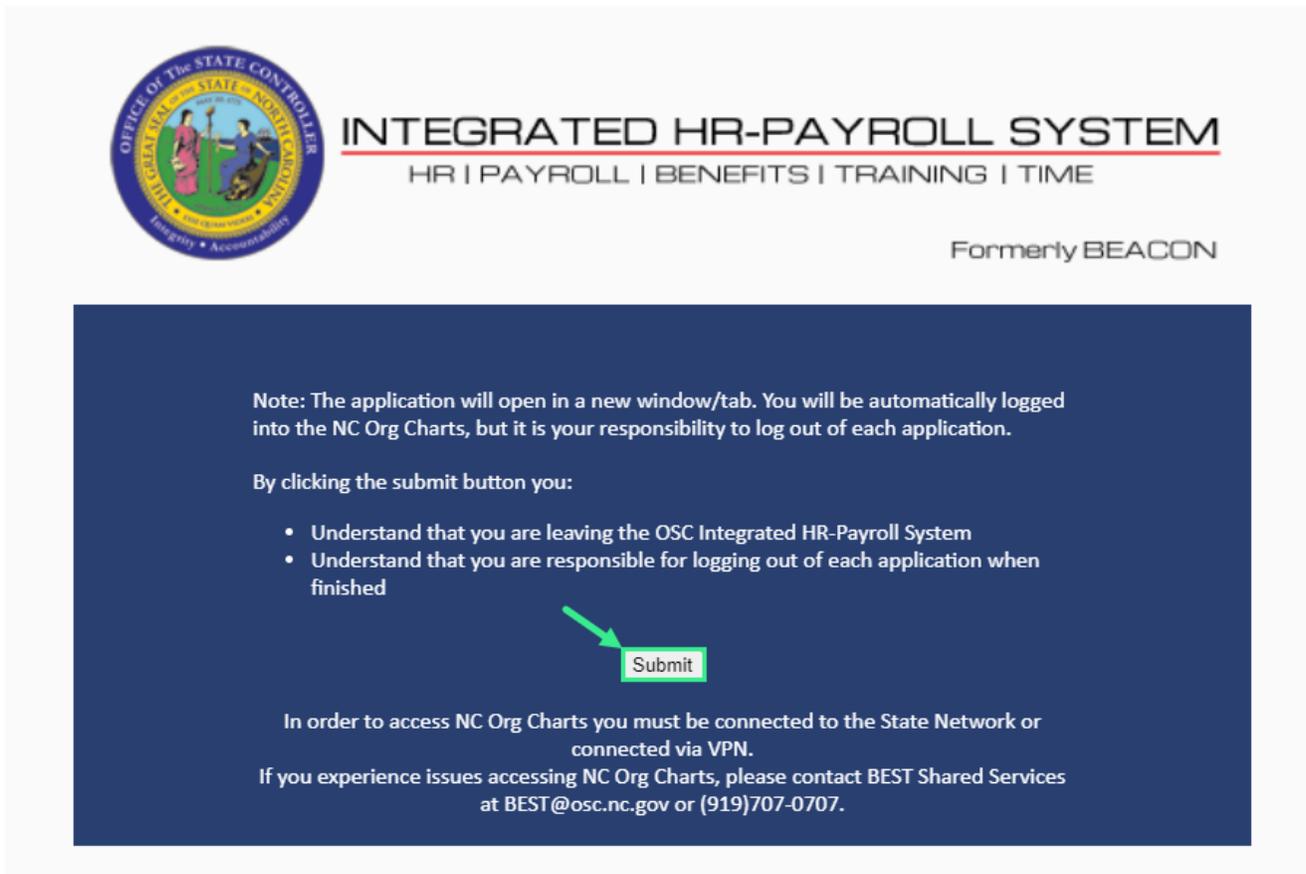
- Visually communicate up-to-date organizational structure in a variety of formats.
- Validate employee and historical data residing in SAP to correct any reporting relationship problems.
- Evaluate current workforce structure and its impact in forecasting trends and future business needs.

View Organizational Charts

- Login to Fiori and select the NC Org Charts tab and then the NC Org Charts tile:



- The launch screen for NC Org Charts will appear with a disclosure statement. Click the submit button:



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Note: The application will open in a new window/tab. You will be automatically logged into the NC Org Charts, but it is your responsibility to log out of each application.

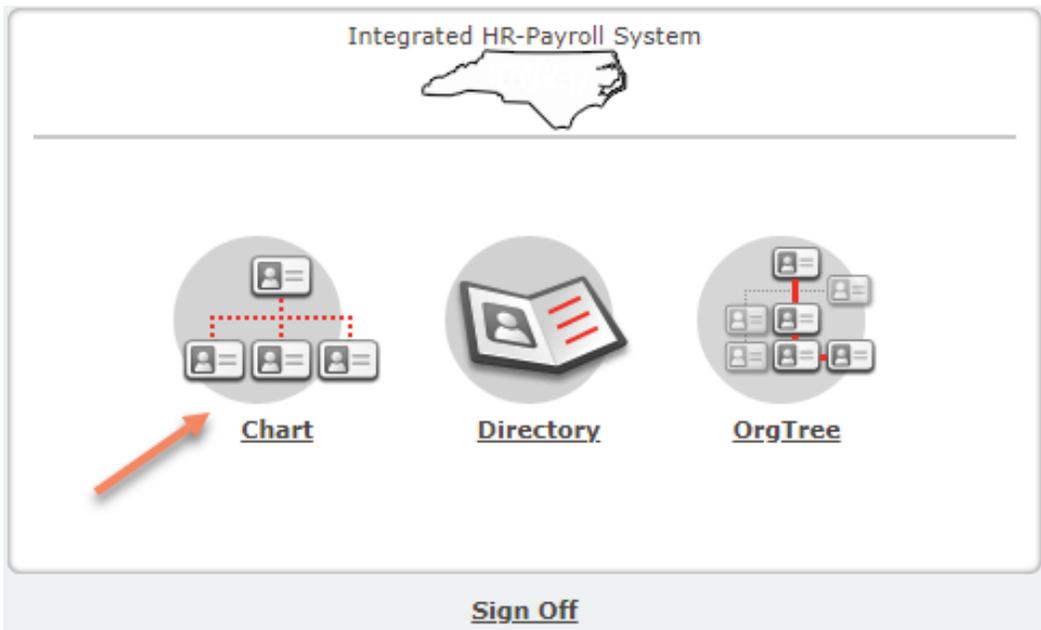
By clicking the submit button you:

- Understand that you are leaving the OSC Integrated HR-Payroll System
- Understand that you are responsible for logging out of each application when finished

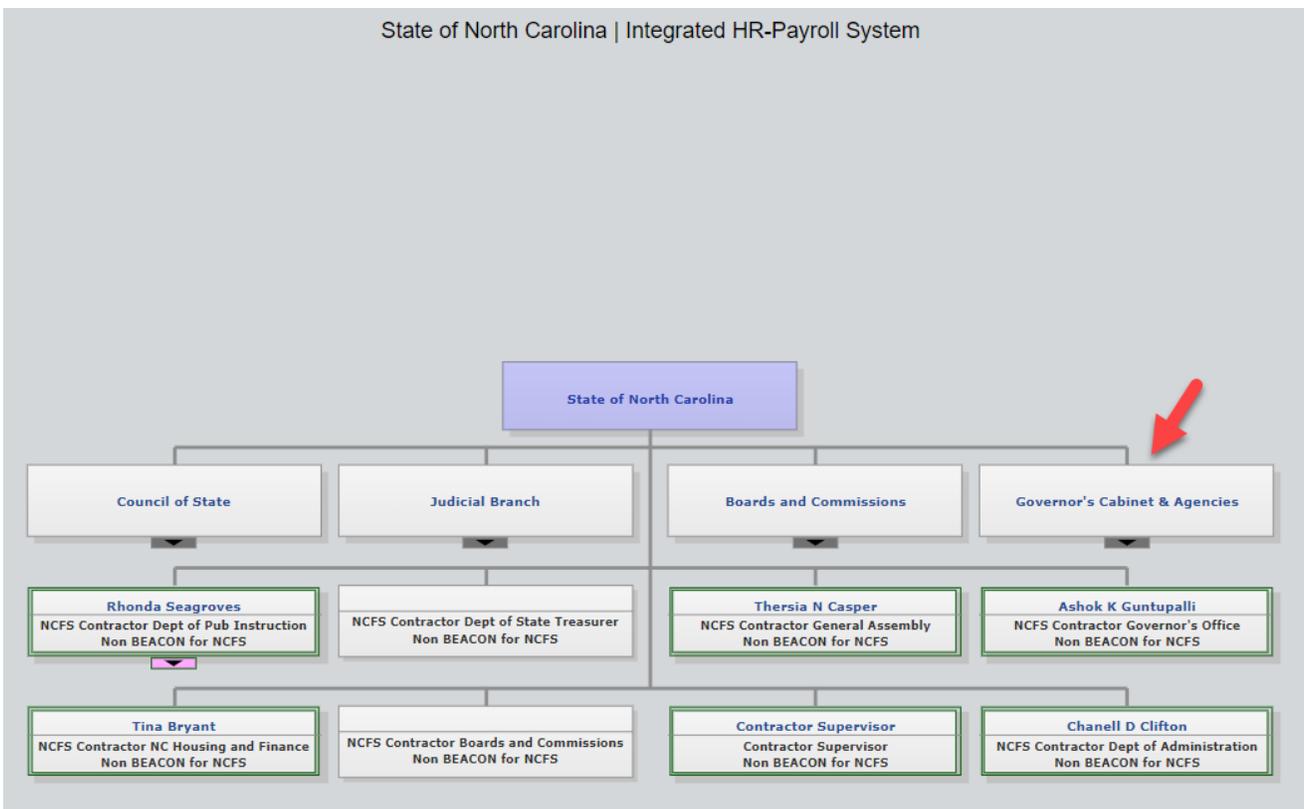


In order to access NC Org Charts you must be connected to the State Network or connected via VPN.
If you experience issues accessing NC Org Charts, please contact BEST Shared Services at BEST@osc.nc.gov or (919)707-0707.

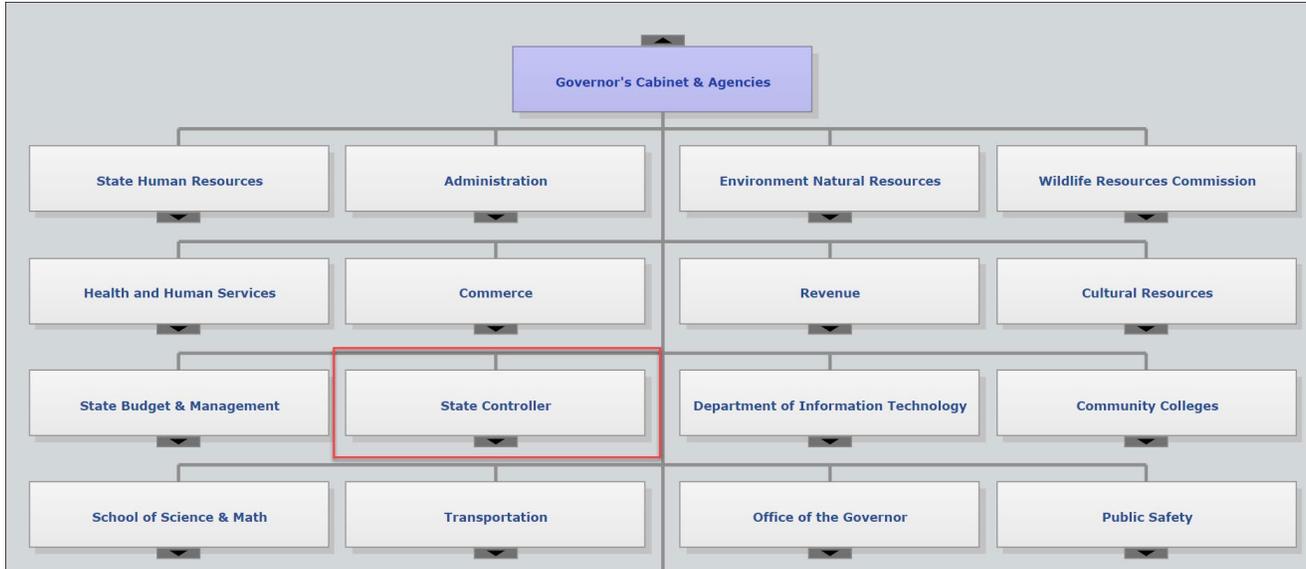
- Select Chart.



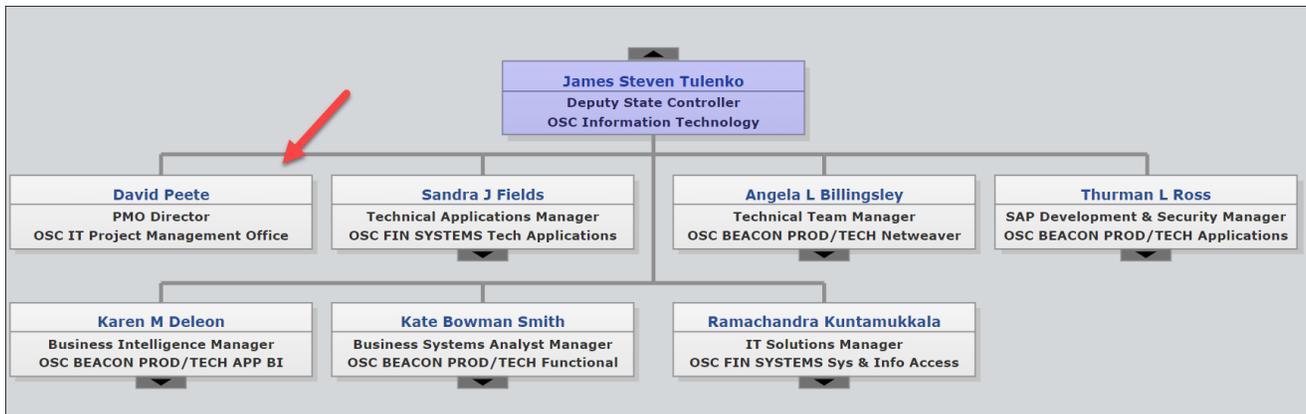
We will locate the organizational chart for the Office of State Controller which can be found under Governor’s Cabinet & Agencies. Select the black arrow under Governor’s Cabinet & Agencies to expand the box.



Select State Controller to expand.



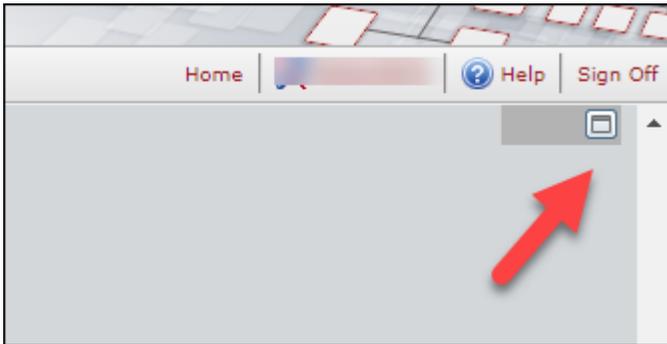
Below is an organizational chart and is typical of the organizational charts you will see within Org Charts.



For each position listed, NC Org Charts displays the following information.

- Employee Name
- Position Title
- Org Unit Name

More information is available when the tray in the right corner of the screen is selected. Click once to expand the information and click again to collapse. Our state data does not include the fields such as phone and email.



You may click on any box in the chart to reveal additional data in the Profile tab. The Position Profile tab displays the information for the specific selected position.

Detail information for: David Peete	
OrgUnit Number:	20000086
Job Number:	31004060
Position Title:	PMO Director

Select the **Bookmarks** tab to bookmark frequently used Org Chart configurations and the **Explore** tab to search for any record.

Note: NC Org Charts is updated nightly, so organization charts will be current based on data that was in the system as of the last nightly update.

Agency Relationships Chart

Before viewing chart examples generated by NC Org Charts, we will review the overview of the state agency relationships supported in NC Org Charts.

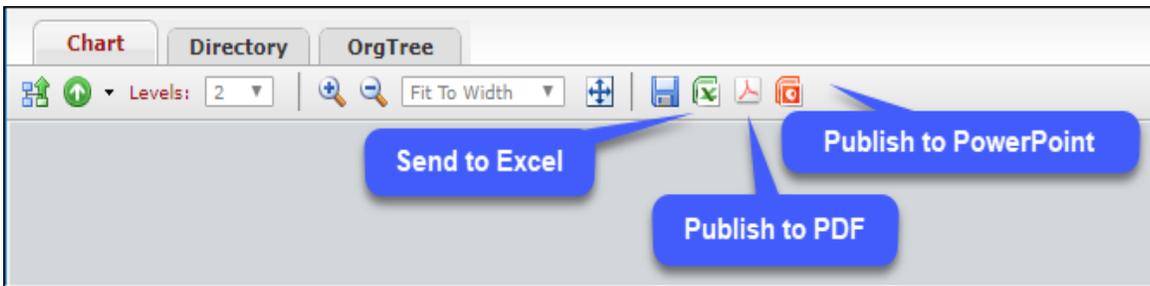


When Judicial Branch is selected, the sub-categories are listed.

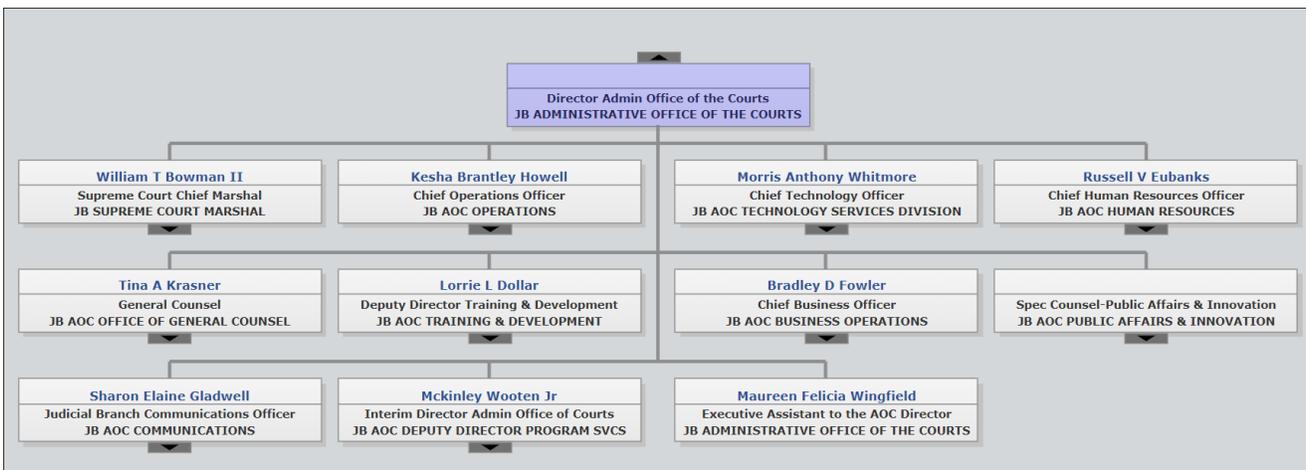


Saving and Sharing Organizational Charts

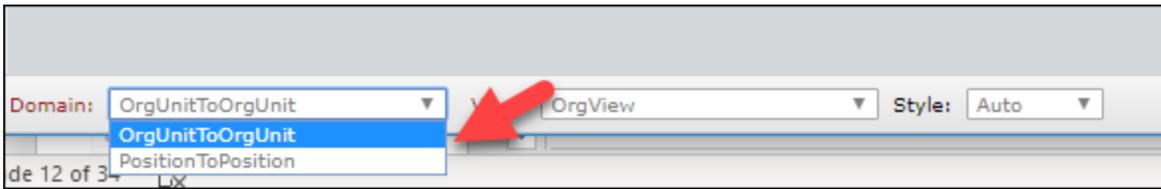
When you view these charts online, keep in mind that you will be able to save these charts in different formats.



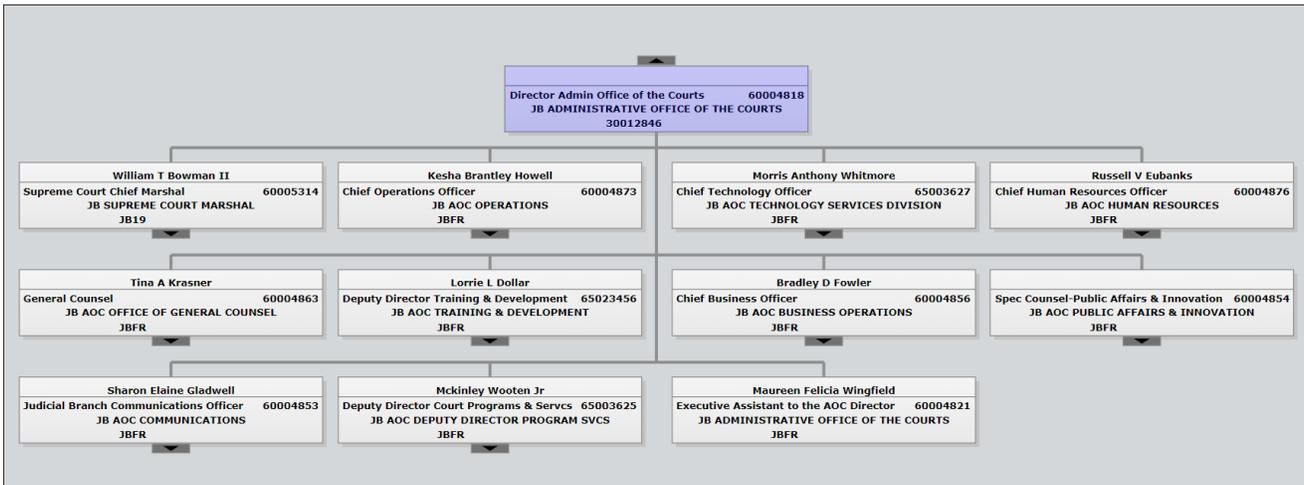
Below is an example of the Org Chart, Directory, and OrgTree formats. This organizational chart is an example of OrgUnit to OrgUnit.



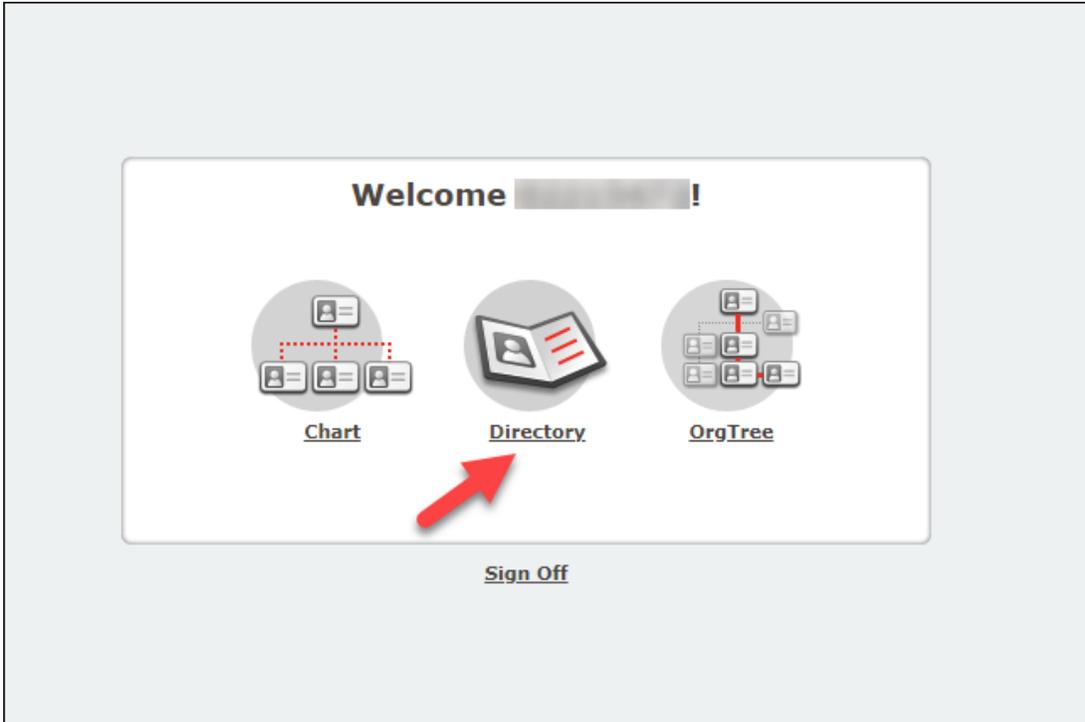
The Position to Position Domain is another option you will use in the Chart Module. In the bottom left corner, select PositionToPosition in the Domain field.



Below is an example of the Position to Position Org Chart.



Directory Module



Below is an example of the Directory Module.

- First, select the Directory tab.



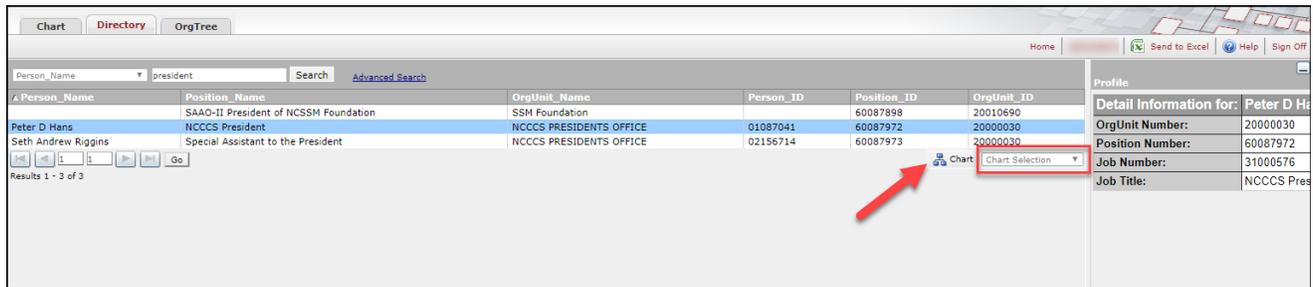
- At the drop down, select the field Position Name.



For search, when Position Name was selected, we typed “president” and Search and a list of all position names containing the word president appeared in the list.

- Highlight the name, then click the Chart icon to view the organizational chart.

Note: There are two choices in the drop down; Chart Supervisor or Chart Selection. Chart Supervisor gives the organizational chart and hierarchy for the *supervisor* of the selected position and Chart Selection shows the organizational chart for the selected position.



Supplemental Reports

Current organizational charts can benefit many agencies and assist with charting, research, and planning needs, but NC Org Charts does not meet all reporting and research needs. SAP ERP and BOBJ Reports are available to access additional data.

NC Org Charts Icons

Review the list of functions and definitions; these are only available in the Chart module.

	Make Top	Creates a chart with the selected box at the top position. To select a box in the chart, click on the specific box.
	Up One Level	Creates a chart with the manager of the current top position in the topmost box.
	Show Levels	Defines the number of levels to chart.
	Zoom In / Zoom Out	Increases / Decreases the magnification of the chart.
	Scale	Changes the magnification of the chart.
	Fit to Window	Resizes the chart so that the entire content is visible in the current window.

	Send to Excel	Exports data from the OrgTree to Excel.
	PDF	Exports the chart to a PDF file.
	PowerPoint	Exports the chart to PowerPoint.

For questions, contact BEST Shared Services:

- Phone, Raleigh Area: 919-707-0707
- Phone, Statewide: 866-NCBEST4U (866-622-3784)
- E-mail: best@ncosc.gov
- Web Site: <https://www.osc.nc.gov/state-agency-resources/customer-service-hr-payroll>

Change Record

- 12/19/22 – Updated to incorporate Fiori instructions. Removed references to Internet Explorer. – Doug Genzlinger
- 09/24/24 – Updated to add new “Headcount” in Profile – serves as a Span of Control count for the record. Also updated screen shots to include branding. – Dana Lyle