



ORGPLUS OVERVIEW

JOB AID OM-3

(FORMERLY OM240 ORGPLUS OVERVIEW)

OM

The purpose of this job aid is to give an overview of the OrgPlus Enterprise System (OPE) which integrates with SAP to create Organizational Charts.

This Job Aid will describe the basic functions and features of OrgPlus and will instruct how to:

- access and manipulate organizational charts through the Chart Module and
- search for records using the Directory Module.

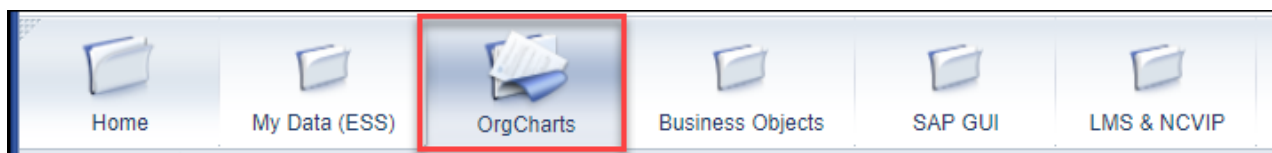
OrgPlus integrates with SAP to create organizational charts for team collaboration, workforce planning, and critical decision making.

OrgPlus 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, and
- evaluate current workforce structure and its impact in forecasting trends and future business needs.

VIEW ORGANIZATIONAL CHARTS

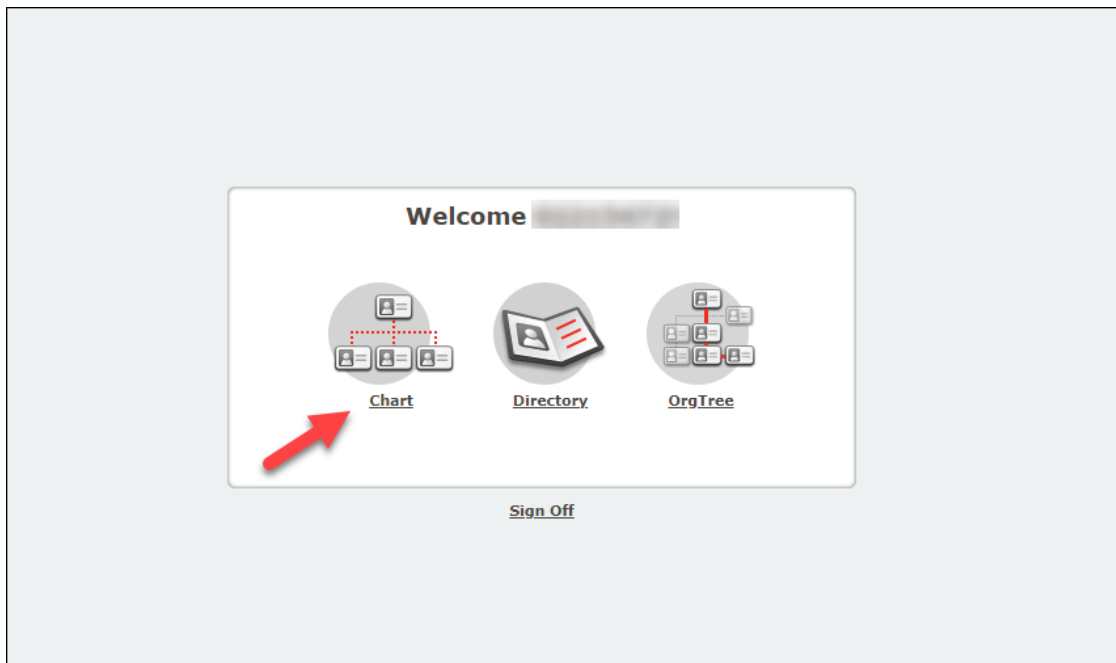
- Login to NCID and select Org Charts



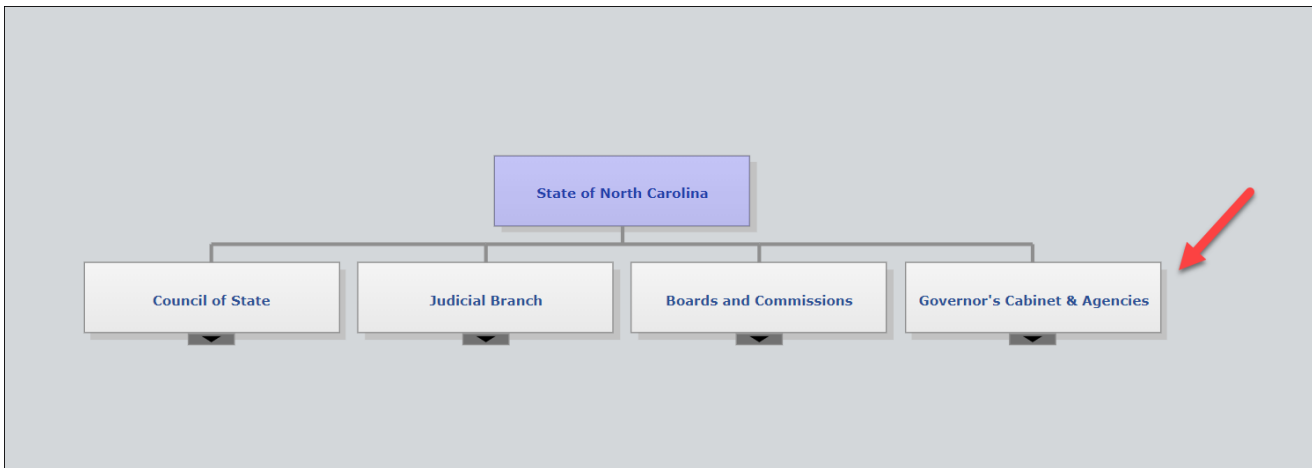
- At the welcome screen, select View Organizational Charts.



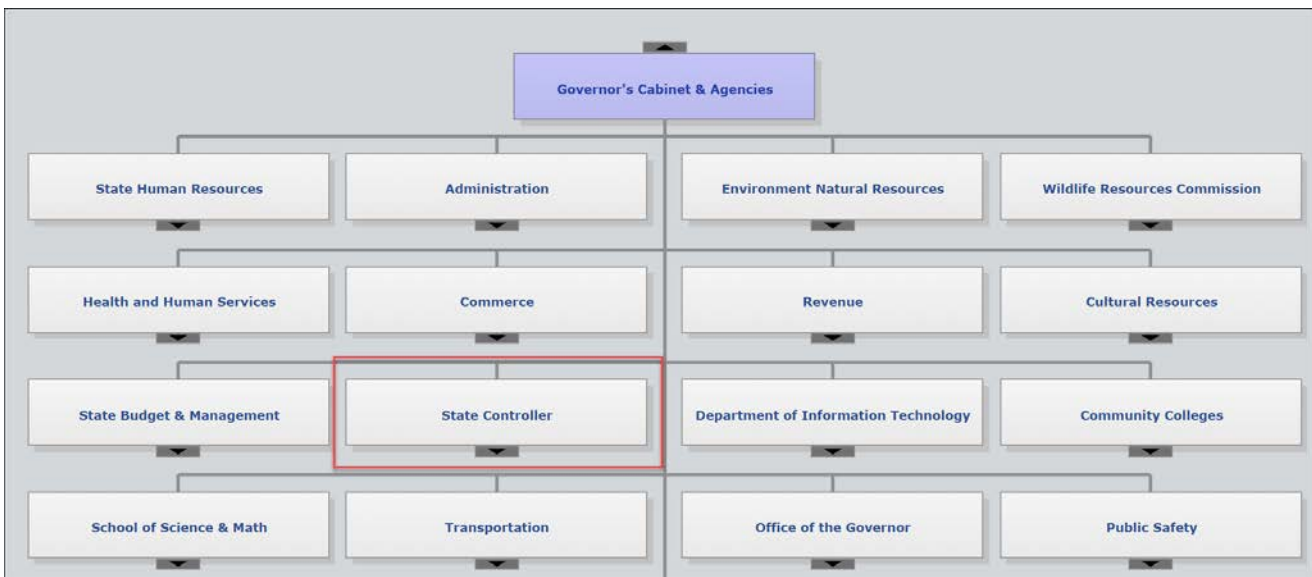
- Select Chart.



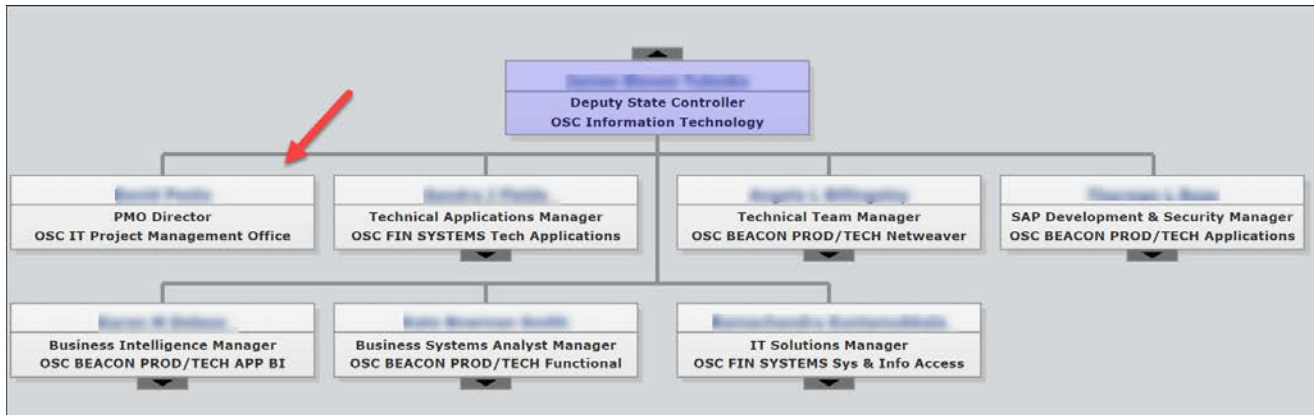
We will locate the organizational chart for the Office of State Controller which can be found under Governor's Cabinet & Agencies. Select the black arrow under Governor's Cabinet & Agencies to expand the box.



Select State Controller to expand.



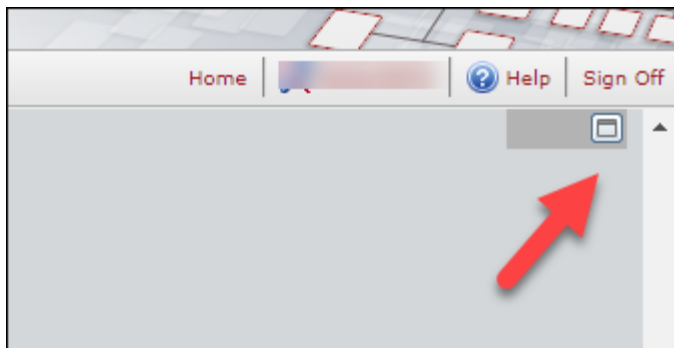
Below is an organizational chart and is typical of the organizational charts you will see within Org Charts.



For each position listed, OrgPlus 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 can 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.

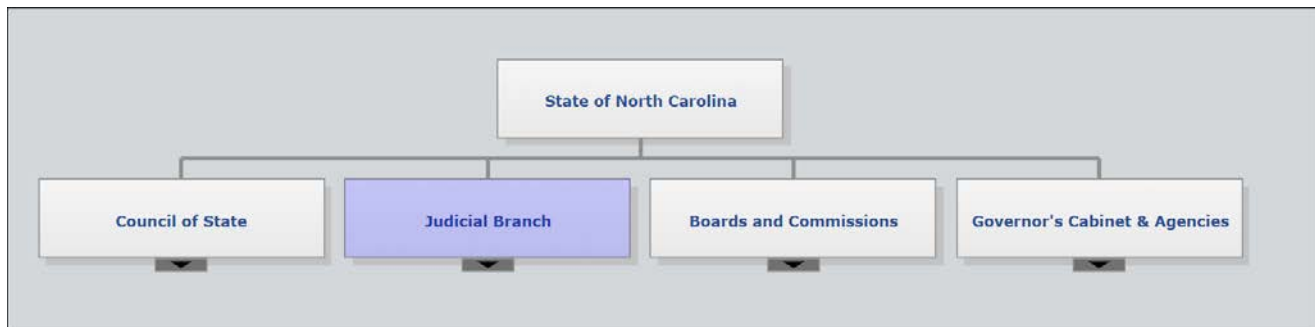
| | |
|----------------------------|----|
| Bookmarks Explore Profile | |
| Detail Information for: Ja | |
| OrgUnit Number: | 20 |
| Position Number: | 60 |
| Job Number: | 3 |
| Job Title: | IT |

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

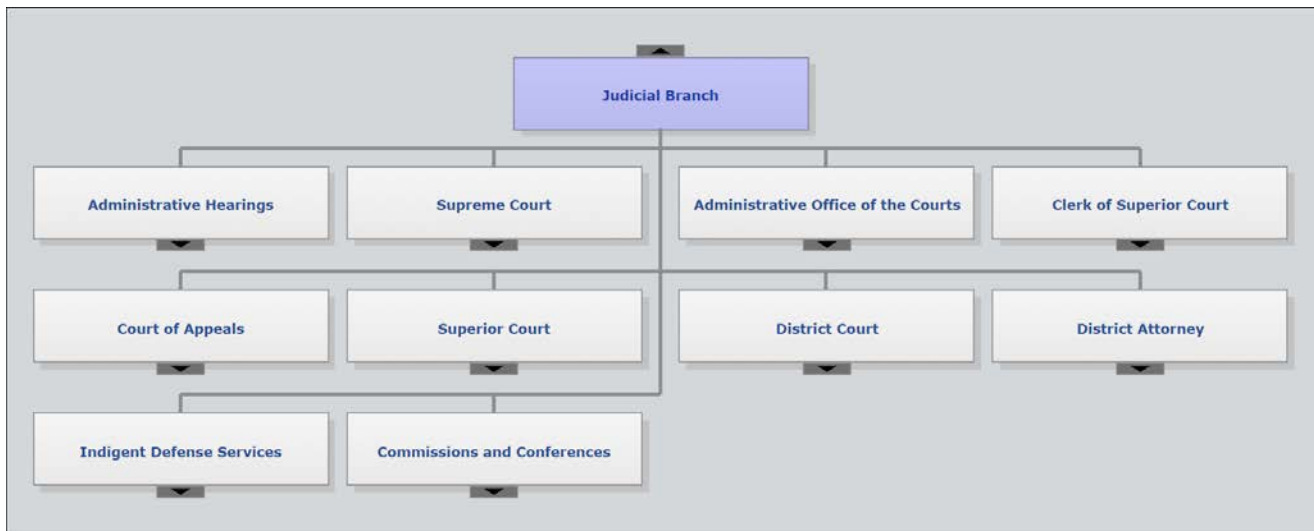
Note: OrgPlus is updated nightly, so organizational charts will be current based on data that was in the system as of the last nightly update.

AGENCY RELATIONSHIPS CHART

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

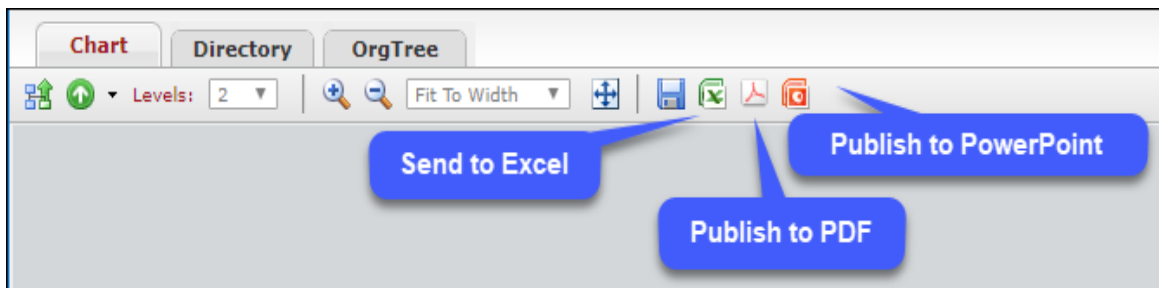


When Judicial Branch is selected, the sub-categories are listed.

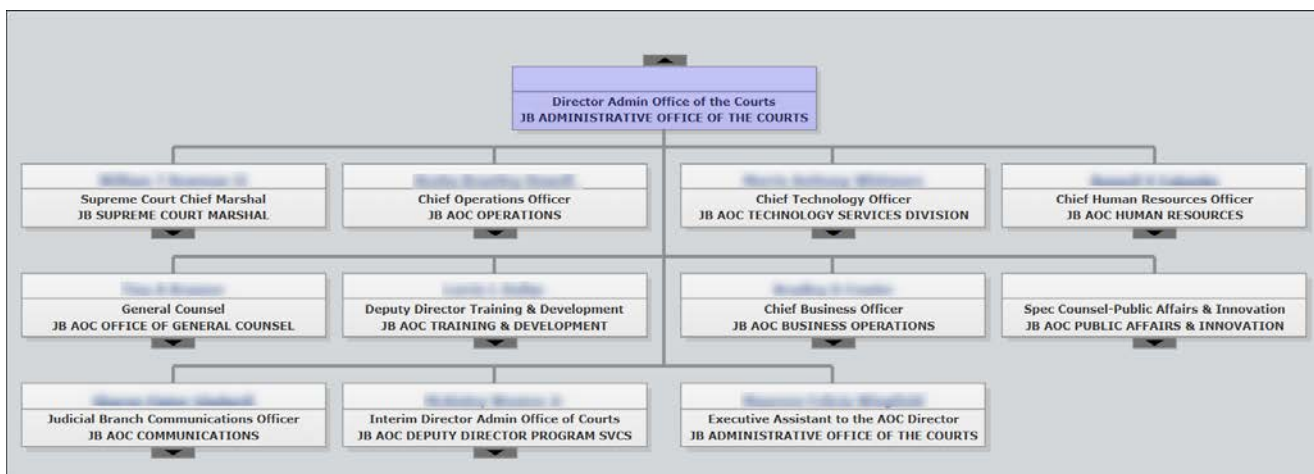


Saving and Sharing Organizational Charts

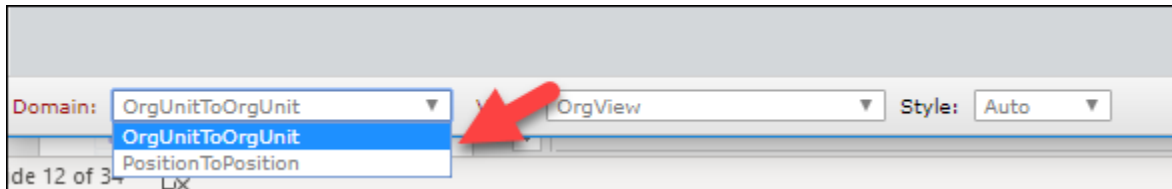
When you view these charts online, keep in mind that you will be able to save these charts in different formats.



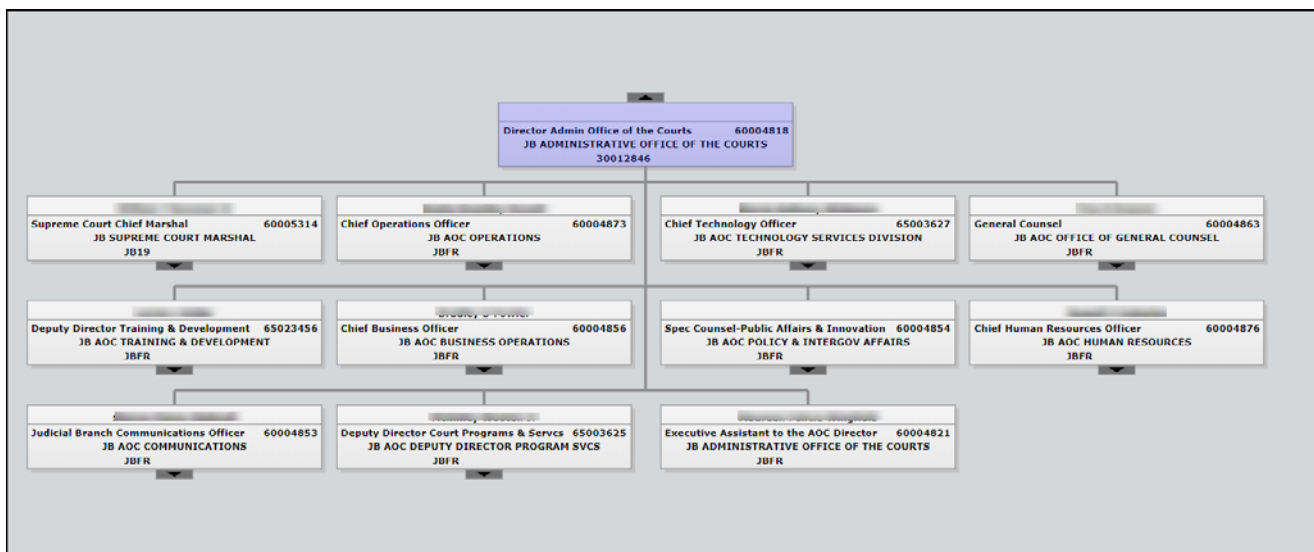
Below is an example of the Org Chart, Directory, and OrgTree formats. This organizational chart is an example of OrgUnit to OrgUnit.



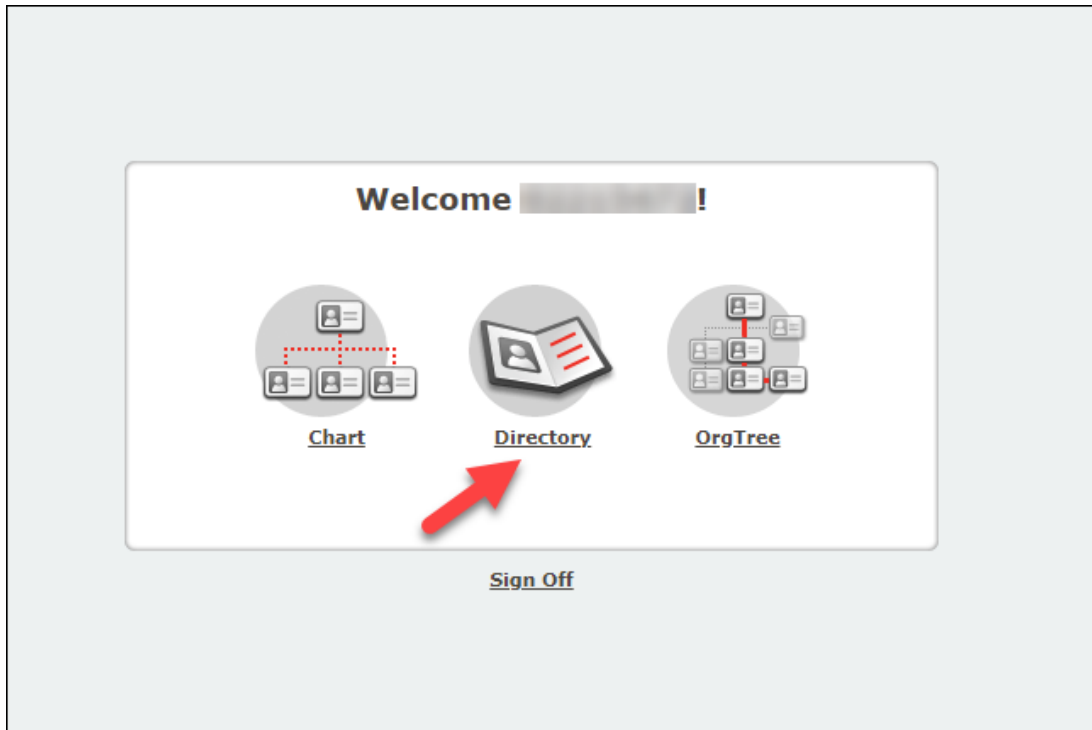
The Position to Position Domain is another option you will use in the Chart Module. In the bottom left corner, select PositionToPosition in the Domain field.



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

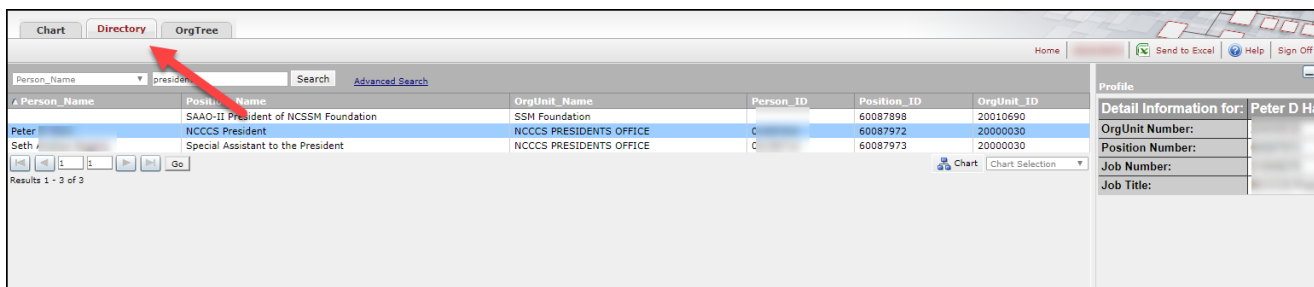


Directory Module

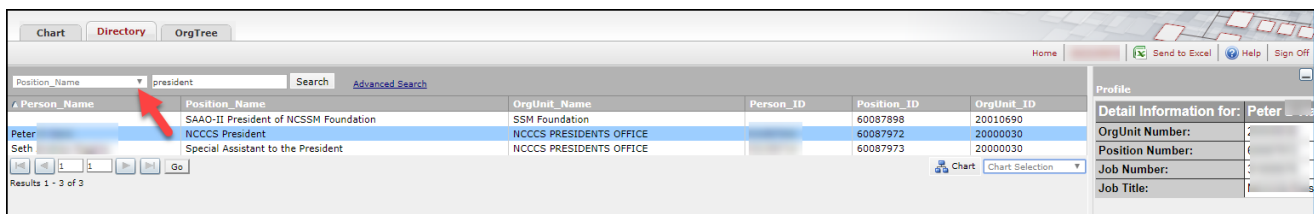


Below is an example of the Directory Module.

- First, select the Directory tab.



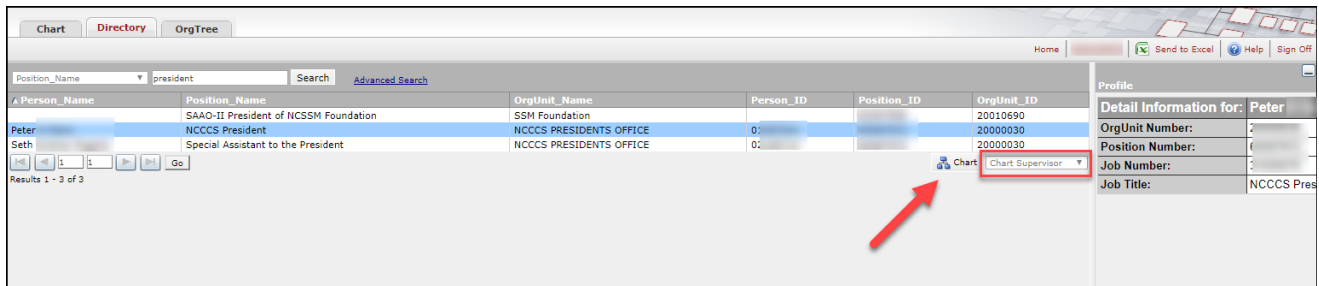
- At the drop down, select the field Position_Name.



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.





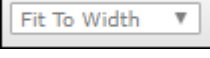






Supplemental Reports

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

OrgPlus Icons

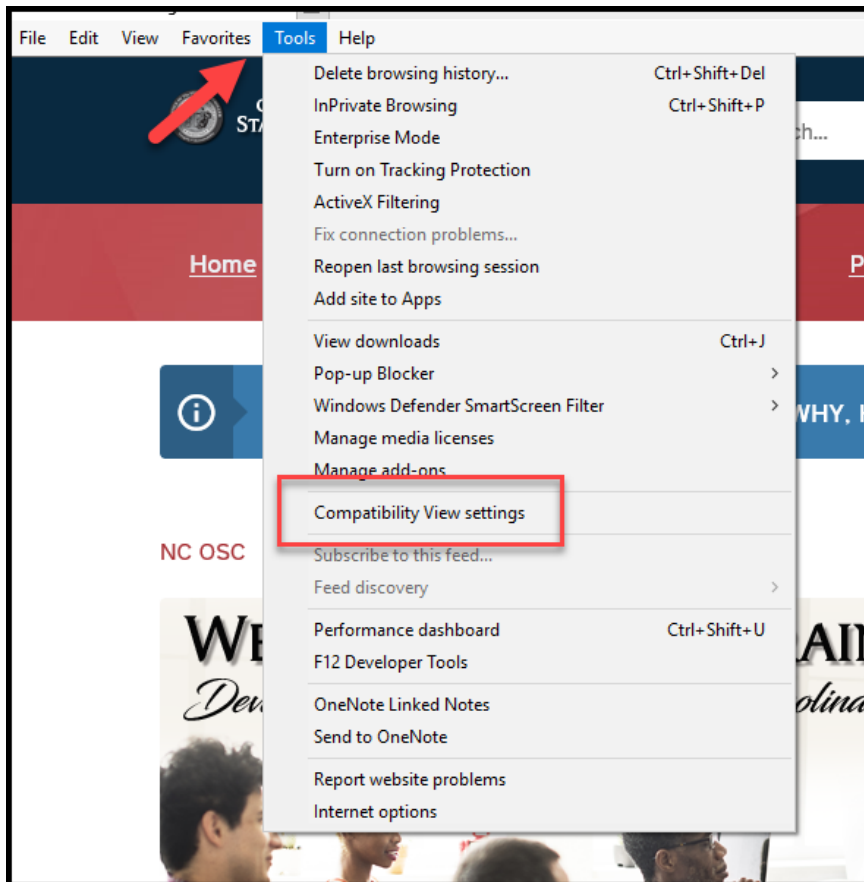
Review the list of functions and definitions; these are only available in the Chart module.

| | | |
|-------------------------------------------------------------------------------------|------------------------------|---------------------------------------------------------------------------------------------------------------------|
|  | 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. |

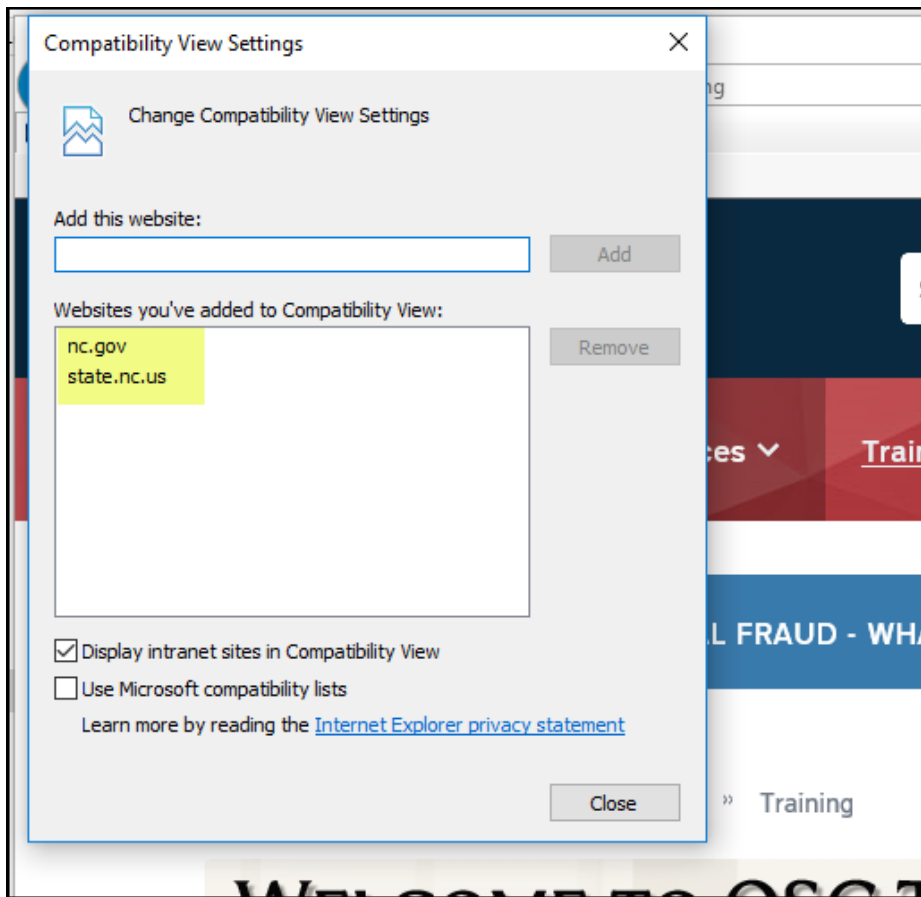
ORGPLUS HELP

If you are having trouble accessing an organizational chart, a common problem could be that your compatibility mode is not set correctly within IE. To re-set your compatibility mode, follow the below steps.

- From your portal page, select Tools and Compatibility View Settings



- Add these two sites and Close.



For questions, contact BEST Shared Services:

- Phone, Raleigh Area: 919-707-0707
- Phone, Statewide: 866-NCBEST4U (866-622-3784)
- Email: best@osc.nc.gov
- Website: <https://www.osc.nc.gov/state-employees/BEST>