

# ORG CHART MANAGER

## About

### **What does the Org Chart Manager application do?**

Org Chart Manager (OCM) is designed to review and change the reporting structure of a position, whether filled or unfilled. At the completion of reassigning a position's reporting relationship in OCM, its "Reports To Position" field in IRIS is updated. OCM only changes a position's reporting relationship. It does not take the place of other IRIS procedures that may be needed when dealing with personnel or positions.

### **Why do I need to use OCM?**

Software applications such as the Outside Interest Form and Concur Travel System which rely heavily on the IRIS HR reporting structure for electronic approval and workflow will continue to be developed in the future. It is therefore essential to keep the IRIS HR position reporting structure up to date to ensure that electronic forms and processes needing on-line approval are routed correctly.

### **Where does the position data in OCM come from?**


The positions and reporting relationships that are reflected in OCM come from the position data maintained in IRIS.

## Overview

### **How do I log in to my OCM account?**

1. Navigate to: [orgchart.utk.edu](http://orgchart.utk.edu).
2. Select **Click Here To Log In**.
3. Enter your NetID and password.

# ORG CHART MANAGER



The University of Tennessee Knoxville

University Organizational Chart

Login:

Click Here To Log In

Need help?

For questions about using this site, please contact the HelpDesk at 865-974-9900

Welcome to the University of Tennessee Knoxville's Organizational Chart Manager. This application is designed to provide an overview of the organizational structure of the many positions at the University. This application can also be used to update the reporting relationship associated with a position within the IRIS system. **Please note that changes made here will only update the reporting relationship. Additional actions within IRIS may be required in order to complete position reassignments.**

University Organizational Chart | <https://orgchart.utk.edu> | Version: 3.0

## OCM Log in Page

## What information is on my OCM home page?

If you are assigned to only one position (Primary) in IRIS, you will see:

- Your primary position title, position number, information about yourself, information about the position's immediate supervisor, and any positions that report to your primary position.

University Organizational Chart

Currently logged in as: (gbeesly) | Logout

Home Page | View Org Chart | Proxies | View My Friends | Admin Actions | Help

Search...

Regional Manager - Primary Position

Number of Direct Reports: 14

Reports To: Norman Wallace

My Info

Position # 789456125

George Beesly (Primary)

[gbeesly@tennessee.edu](mailto:gbeesly@tennessee.edu)

Regional Manager

Regional Office

1725 Slough Avenue

Knoxville, TN 18505

570-343-3400

To update this information, complete the IRIS Personal Data Form

My Supervisor / Manager / Department Head

Position # 789456123

Norman Wallace

Not correct?

[nwallace@tennessee.edu](mailto:nwallace@tennessee.edu)

Chief Financial Officer

Corporate Office

1345 Sixth Ave

New York, TN 18505

570-343-3400

Positions That Report To Me

Show 10 entries

Search:

Name	Position #	Position Description	Defaulted	Reassign	Impersonate	Reset
John Beesly (jbeesly)	789456128	Receptionist   Regional Office				
Sally Bender (sbender)	789456133	Regional Director in Charge of Sales   Regional Office				
Phyllis Corbett (pcorbett)	789456135	Sales Rep.   Regional Office				

## Primary Position Information Window

2

# ORG CHART MANAGER

## Can an employee be assigned to more than one position?

Yes. Employees can be assigned to multiple positions in IRIS with one of those positions being their Primary position. All positions to which an employee is assigned are shown on their Home Page in Org Chart Manager.

## What information about my additional position(s) is on my OCM home page?

If you are assigned to multiple positions in IRIS, you will see all positions to which you are assigned. To view these positions:

1. Click on the position title that you would like to view.
2. Click the position title again to collapse/close the information window.

The information window contains the same information as your Primary Position window; the position title, position number, information about yourself, information about the position's immediate supervisor, and any positions that report to that position.

## Where do I view positions that report to me?

Positions, filled and unfilled, that report to you are shown on the bottom of your home page.

University Organizational Chart

Currently logged in as: (gbeesly) | Logout

Home Page View Org Chart Proxies View My Friends Admin Actions ? Help Search...

Regional Manager - Primary Position Number of Direct Reports: 14 Reports To: Norman Wallace

**My Info**  
Position # 789456125

George Beesly (Primary)

[gbeesly@tennessee.edu](#) 1725 Slough Avenue  
Regional Manager Knoxville, TN 18505  
Regional Office 570-343-3400

To update this information, complete the IRIS Personal Data Form

**My Supervisor / Manager / Department Head**  
Position # 789456123

Norman Wallace Not correct?

[nwallace@tennessee.edu](#) 1345 Sixth Ave  
Chief Financial Officer New York, TN 18505  
Corporate Office 570-343-3400

**Positions That Report To Me**

Show 10 entries Search:

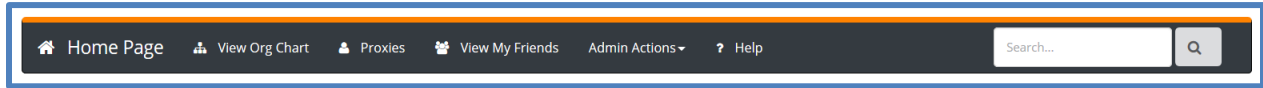
Name	Position #	Position Description	Defaulted	Reassign	Impersonate	Reset
John Beesly (jbeesly)	789456128	Receptionist   Regional Office				
Sally Bender (sbender)	789456133	Regional Director in Charge of Sales   Regional Office				
Phyllis Corbett (pcorbett)	789456135	Sales Rep.   Regional Office				

*"Positions That Report To Me" List*




# ORG CHART MANAGER

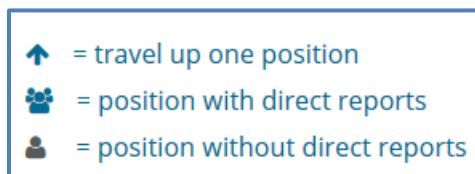
## How can I follow the reporting relationships from one position to another?

On your OCM Home Page, select the **View Org Chart** from the navigation bar located at the top of your Home Page.



*Home Page Navigation Bar: View Org Chart*

- As you step through an organization's reporting structure, positions that have positions reporting to them will be shown with an  icon. Clicking on one of these positions will show the positions that report to it. Positions that do not have positions reporting to them will be shown with an  icon.
- You will see your position, any positions that report to you, and your supervisor's position.
  1. If a position that reports to you is a supervisory position, you can move down the organization by selecting that position.
  2. Clicking on the position a second time will close the list.
  3. To move up the organization, select  (the up arrow) next to your supervisor's name.



*Reporting Structure Icons*

## Changing a Reporting Relationship

### Who can change a position's reporting relationship using the OCM application?

A person can change a position's reporting relationship if that position reports to them either directly or indirectly through their Unit's reporting hierarchy. The change in a reporting relationship is accomplished through a position reassignment in OCM.

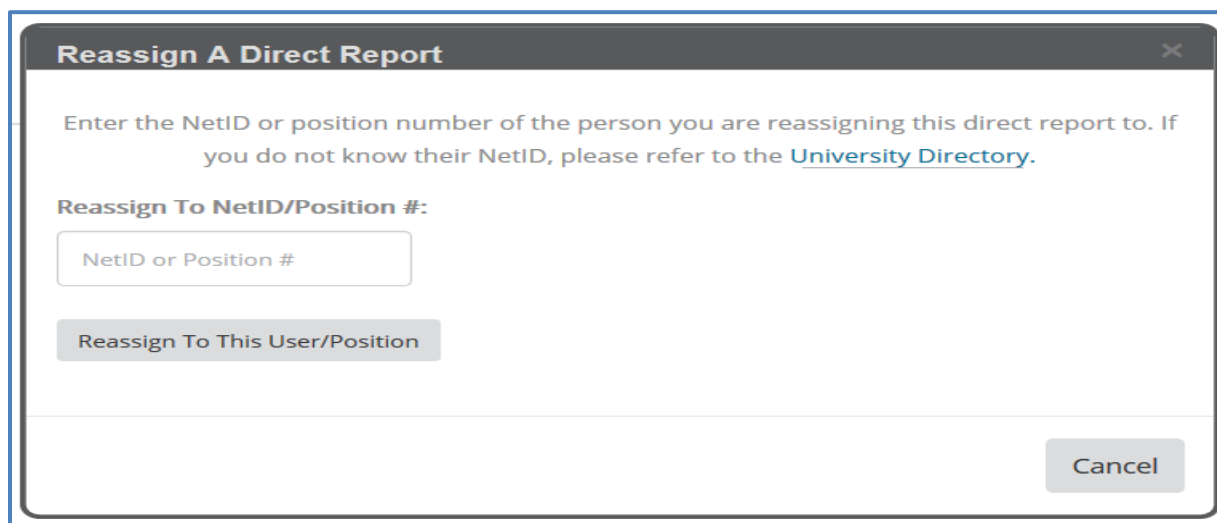
# ORG CHART MANAGER

**Example:**

- A Manager can change the reporting structure of a position that reports directly to them.
- A Director can change the reporting structure of a position that reports directly to them, such as a Manager's position, or any positions that report to that Manager (Indirect Reports).

**How do I change the reporting relationship of a position?**

- If you are assigned to one position (Primary), all positions that report directly to your position are shown at the bottom of your OCM home page.
- If you are assigned to multiple positions in IRIS, select the position you would like to work with to view positions that report to it.
  1. When you have located the position (filled or unfilled) that needs its reporting relationship reassigned to another position, select the "Reassign" button (double arrows ⇄) located to the right of that position.
  2. When prompted, enter either the NetID or Position Number of the person to whom you are reassigning this Position.



**Reassign A Direct Report**

Enter the NetID or position number of the person you are reassigning this direct report to. If you do not know their NetID, please refer to the [University Directory](#).

**Reassign To NetID/Position #:**

NetID or Position #

Reassign To This User/Position

Cancel

*Transfer A Direct Report Window*

- When you reassign a position from one supervisor to another and both supervisors report to you, the change is immediate within OCM and the position's reporting relationship is updated in IRIS.

# ORG CHART MANAGER

## Example:

A Dean reassigns the reporting relationship of a position from one Department Head to another Department Head where both Department Heads report to that Dean.

- After selecting the “Reassign” button, the position will disappear from your list of positions, and you will receive a message at the top of the screen saying that the Reassignment was successful. The supervisor that you transferred the position to will see the transferred position on their OCM home page.
- When you reassign a position to a supervisor who does not report to you, that supervisor will be notified by email that a position reassignment has been requested. They will then need to log into OCM and accept the reassignment. Once the position reassignment has been accepted in OCM, the reporting relationship change in IRIS is updated.

✓ Your request has been initiated. You will receive a confirmation email once this reporting relationship has been updated in IRIS.  
Warning: This action only changes the employee's supervisor. Any other change to the person or position must be handled via IRIS transaction.

## Reassign Alert

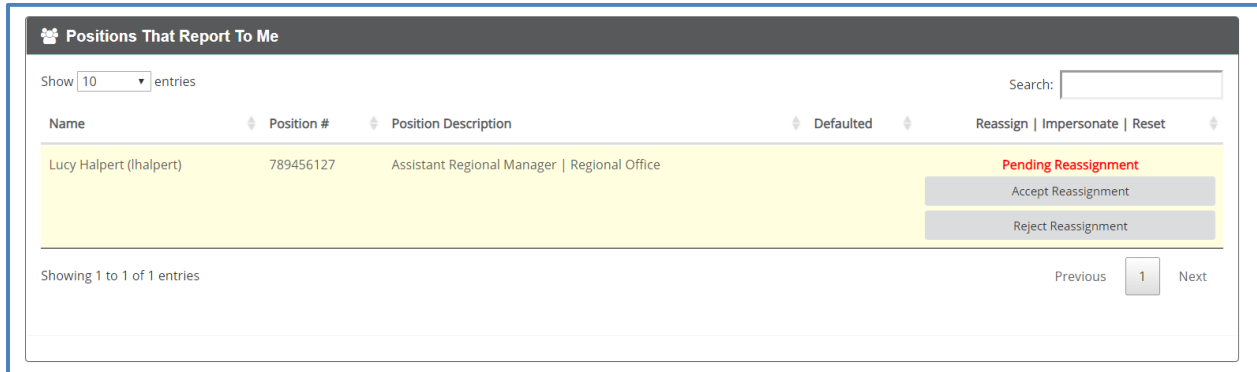
## Example:

A Dean reassigns a position to another Dean. After selecting the **Reassign** button, you will see a **Pending Reassignment** message on the position that you have requested to be reassigned. If the reassignment is accepted by the other supervisor, the position will disappear from your list of positions. If the request is rejected by the other supervisor, you will receive an email saying that it was rejected, the **Pending Reassignment** message will go away, and the position will remain on your list of positions.

# ORG CHART MANAGER

**I received an email from OCM that said "A position reassignment has been requested by (*employee name*)."** What should I do?

1. Log into your OCM account.
2. At the bottom of your home page, in the list of positions reporting to you, you will see the position with a **Pending Reassignment** designation highlighted in red.
3. Select the **Accept Reassignment** or **Reject Reassignment** button.




*Pending Transfer Window*

## **Why are some positions that do not report directly to me listed under my position on my home page?**

If a position does not have a reporting relationship established in IRIS the position will be defaulted in OCM to its cost center owner in. If you are a cost center owner, you may see positions that were defaulted to your position. They will be listed on your home page and have a check mark in the defaulted column. You should **reassign** those positions to the appropriate supervisor. You may choose a proxy to do that for you.

**Note:** It is possible to reassign a defaulted position to yourself. If a defaulted position actually reports to you, you should reassign it to yourself which will write the correct "Reports To" information to IRIS.

Sometimes positions are entered into IRIS with incorrect "Reports To" information. This can result in positions being listed incorrectly on a person's Home Page as reporting to them. If a position is not in your organization and you do not know who they report to you can reset the position instead of reassigning it. Resetting a position will move the position in OCM to the cost center owner of that position. When you have located the position that needs to be reset select the "Reset" button (  ) located to the right of that position.

# ORG CHART MANAGER

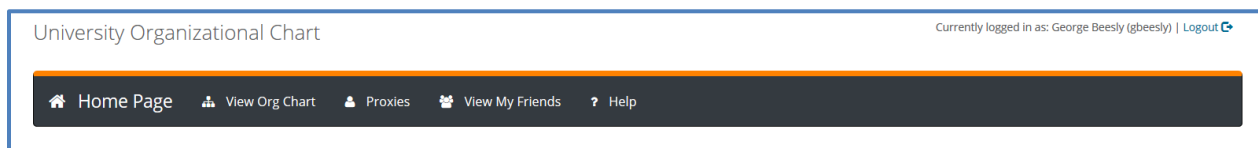
## Proxy

### Can I designate someone else to transfer positions for me?

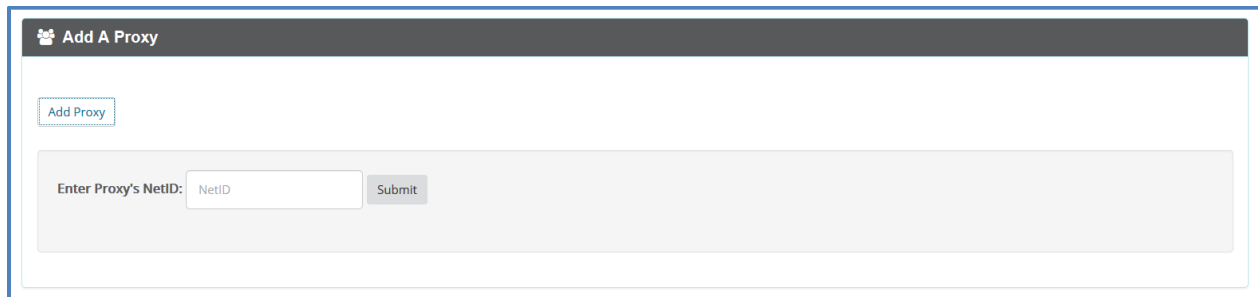
Yes. You can designate someone to act as your proxy, giving them the ability to reassign positions for you.

1. On your OCM home page, select **Proxies** from the Navigation bar at the top of the page.
2. Select **Add Proxy**.
3. Enter the NetID of the person that you are designating as your Proxy.

**Note:** OCM does not generate an email to the person that you have designated.



*Home Page Navigation Buttons: Proxies*



*Add A Proxy Window*

### I have been designated by someone to act as their Proxy in OCM. What should I do?

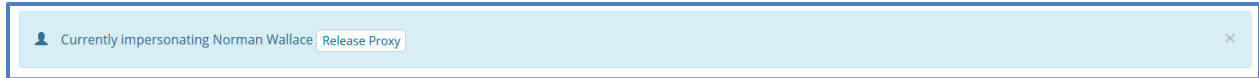
1. Log into your OCM account.
2. Select the **Proxies** button on the navigation bar at the top of the home page. You will be presented with the person's name that has designated you as their proxy.
3. Select the **Impersonate User** icon (↔) and you will be taken to that person's home page. At the top of the home page you will see the person's name for whom you are acting as a proxy.



# ORG CHART MANAGER

## **What should I do when I am finished working in OCM as a Proxy?**

Clicking the **Release Proxy** button located in the blue bar at the top of the home page will end your proxy session and return you to your home page.



*Release Proxy Window*

## Friend Positions

What is the 'View My Friends' choice on the navigation bar at the top of my Home Page. There are positions in IRIS designated as Friend. By default, these positions are not shown on the Org Chart View or listed in your employee list. If you have Friend position(s) assigned to you in IRIS, you can view those position(s) by selecting 'View My Friends' on the Navigation bar.

### **How do I add a Friend position to the Org Chart View and also to the list of positions that report to me on my Home Page?**

After choosing 'View my Friends' from the navigation bar you will be presented with a list of Friend positions that are assigned to you in IRIS. There is a button to the right of each Position that will give you the capability to 'Show Friend' or 'Hide Friend'. If you choose 'Show Friend' that position will be added to positions that report to you on your OCM Home Page and will also be listed on the Org Chart View. If you choose 'Hide Friend' that position will be taken off of your Home page view and also off of the Org Chart View.

**Need more help? [Contact the OIT HelpDesk.](#)**