ORGS 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.
2. Select Click Here To Log In.
3. Enter your NetID and password.
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.
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.

“Positions That Report To Me” List
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.

- 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

- 🙆‍♂️ = travel up one position
- 👪 = position with direct reports
- 👤 = position without direct reports

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**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 is a reporting relationship is accomplished through a position reassignment in OCM.
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.

- 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.
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.

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.
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.

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**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.
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.

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.
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.

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**Release Proxy Window**

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**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 you Home page view and also off of the Org Chart View.

**Need more help?** [Contact the OIT HelpDesk.](mailto:helpdesk@organization.com)