



Guidance Notes

HR Information Services
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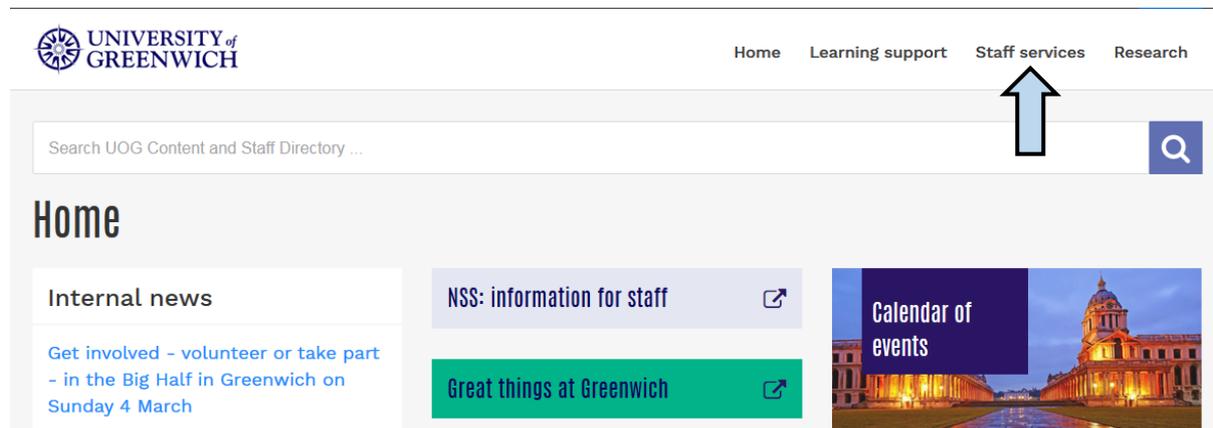
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Accessing the System

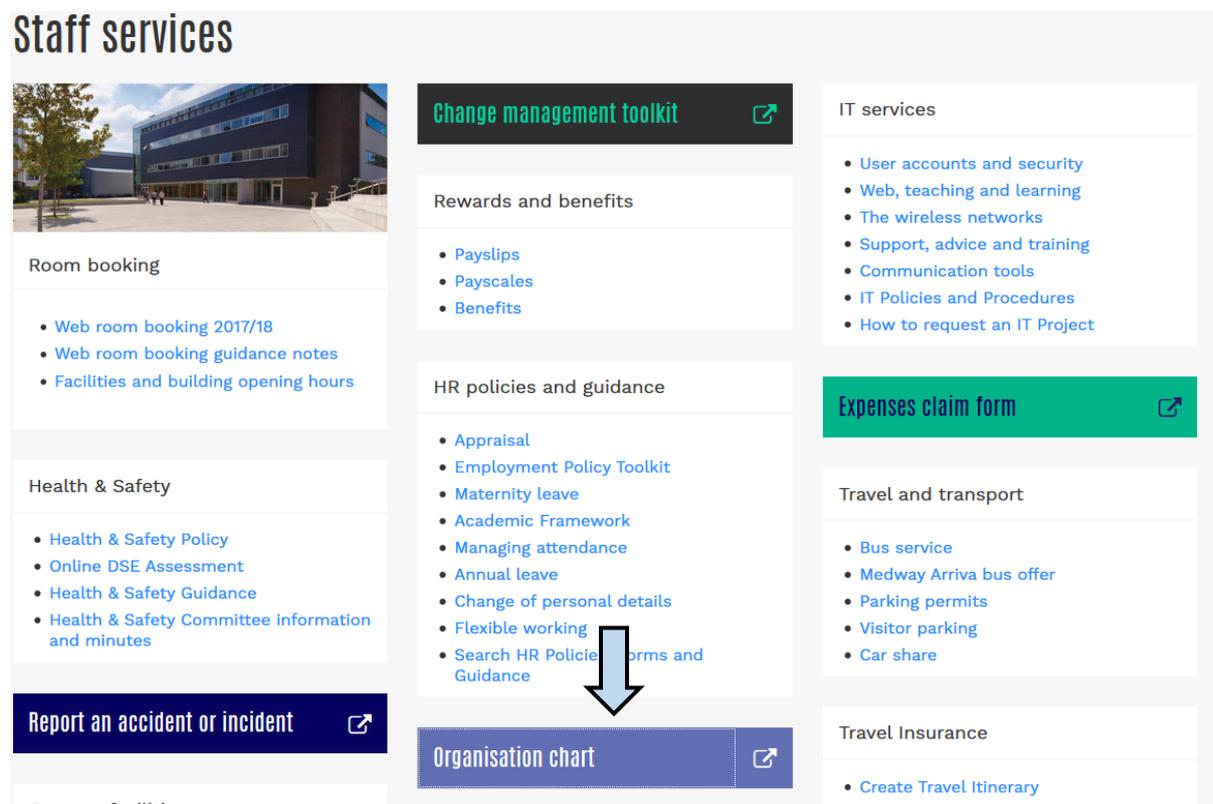
The organisational charts can be accessed via the Portal.

To access the portal visit this URL: <https://portal.gre.ac.uk> and enter your network ID and password.

Once you are logged in, select Staff Services.



Then scroll down to the button labelled 'Organisation chart'.



To log off, simply close the tab on your web browser or select the



icon from the top toolbar.

Subchart Arrows

You can navigate through the charts by using the Subchart Arrows.

The Subchart Arrows  allow you to drill up or down from a manager's position through the hierarchy from within the chart itself.

These arrows can also be used in exported interactive PDF documents.

You can also navigate using the Subcharts and Search panels as explained later in the document.

Toolbars

The toolbars at the top and bottom of the page contain the most commonly used functions and information about the chart you are viewing.

Opening a chart

To open a chart, select the icon below from the top toolbar and choose which chart you would like to view.



There are currently two charts available:

- the **'Positions Chart'**, which shows the line management reporting structure in terms of employees in permanent or fixed term salaried positions (hourly paid and non-contractual staff are not included)
- the **'Organisations Chart'**, which shows the university's hierarchy of organisation units.

Zooming

With an open chart you will see the zoom bar in the bottom toolbar. You can either click on the +/- symbols on the zoom bar or use the mouse wheel to increase or decrease the zoom level.

Select/Pan

If you are zoomed in on a chart you can use the Pan function to move across the chart. To use the

Pan function select the hand icon  from the top toolbar.

To alternate back to the regular mouse functionality select the mouse icon



Exporting

The top toolbar also holds the Publish function.



Select  to export and publish your chart to a number of commonly used file formats, eg JPEG, PDF and XML.

The following PDF output options are available:

- Current Page - Create a PDF for the current page.
- Current Branch - Create a PDF for the current subchart and all subordinate subcharts.
- Entire Chart - Create a PDF for the entire chart.

Other available output options are:



Background
Transparency

Turn on/off transparent background. This option should be used when pasting (or inserting) charts into PowerPoint slides (especially if a slide has a coloured background). Only applicable to PNG.



Crop to Chart

The white space around the chart is cropped out in output. Applicable to all formats except for PDF.



To export to Excel select the  icon from the top toolbar.

- When exporting to Excel, you can select to export the entire chart or a subset of the chart.
- Entire Chart - Export all rows in the chart (including orphans).
- Current Branch - Exports the current subchart and all subordinate subcharts.
- Current Page - Exports the current subchart.
- Orphan Records - Exports all records not currently appearing in the hierarchy.
- Top Level Orphans - Exports only records with an invalid or missing supervisor.
- Entire Chart (Extended) - Export all rows in the chart (including orphans). See additional information below.
- Redeployed Only - Exports boxes that have been manually moved since the last refresh.

Side Panel

The Side panel holds various subpanels that allow you to interact with the charts.



To open or close the Side Panel select the icon from the top toolbar.

Profile



The profile panel gives you access to fields and formulas beyond what is shown in the selected chart box. When you click on a box in the chart, additional details about that box are displayed in the profile panel.

Subcharts



The subcharts panel is another method to easily navigate through the charts.

Click on any subchart listed in the panel to navigate to the associated chart.

Use the up/down arrow keys on your keyboard to quickly switch between charts.

To expand or collapse a subchart use the +/- button to the left of each organisation unit.

Search



You can use the Search Panel to find records in the chart.

Type any part of an employee's name or job title into the search text entry and then click on the search button. A list of matching results are displayed.

Views



The Views panel allows a user to quickly switch between different presentations of a chart.

There are currently two views available to users, **Standard** and **Contact**.

The Standard view displays only the Employees name and Job Title.

The Contact view displays the Employees name and job title as well as their photo and email address. Phone and room numbers will be added to this view in a later release.

Photos

OrgChart Now uses the same directory to find staff photos as Microsoft Outlook.

To add your photo to OrgChart Now, open Outlook and select the **FILE** menu.

Under 'Account Settings' select the 'Change' button underneath the grey person icon.



Change

This will open up a link to the Outlook Web Application.

Select 'Browse' and choose the photo you wish to upload.

Use the buttons to change or remove your photo.



Once selected the photo will appear in the 'Preview' window. To confirm the selection, hit 'Save' and the picture will be stored on the directory.

It may take up to 24 hours for OrgChart Now to feature your picture.