Nakisa Org Chart

User Guide

Navigating Nakisa

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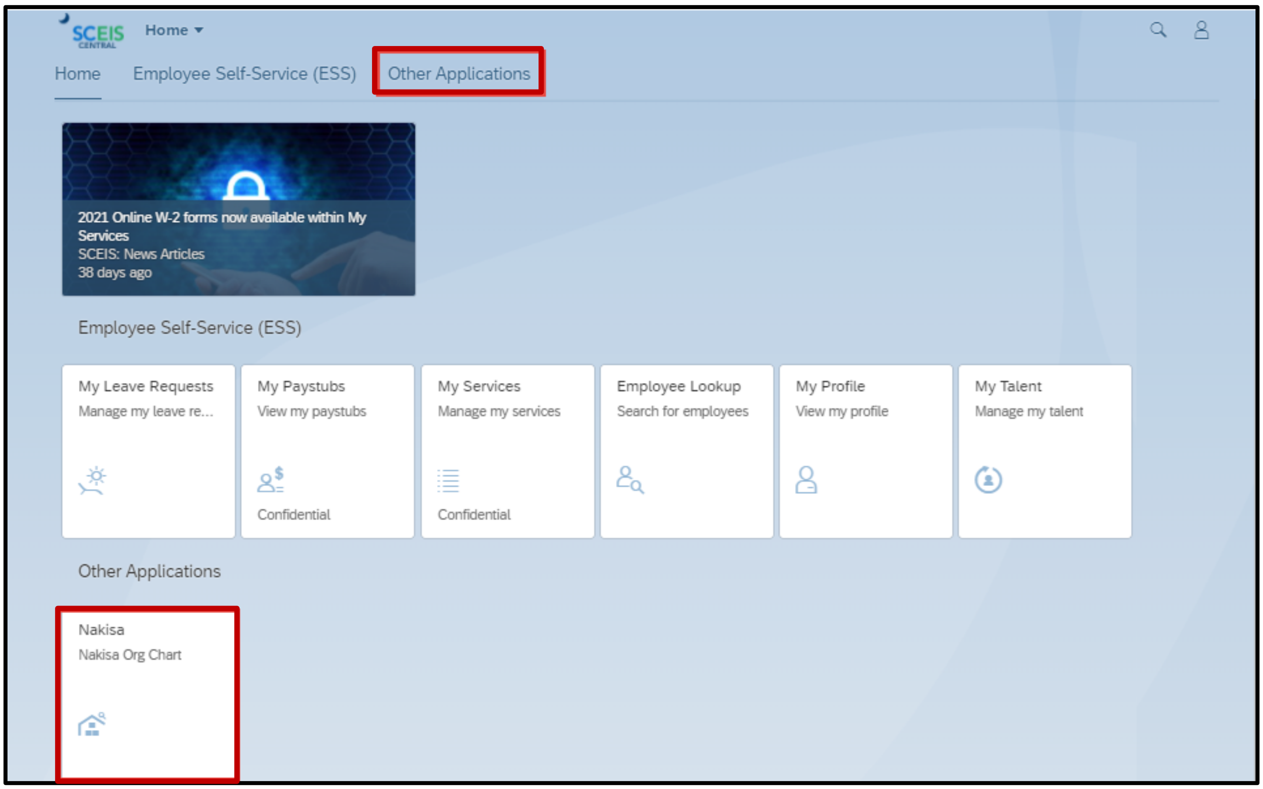
1 - Getting Started

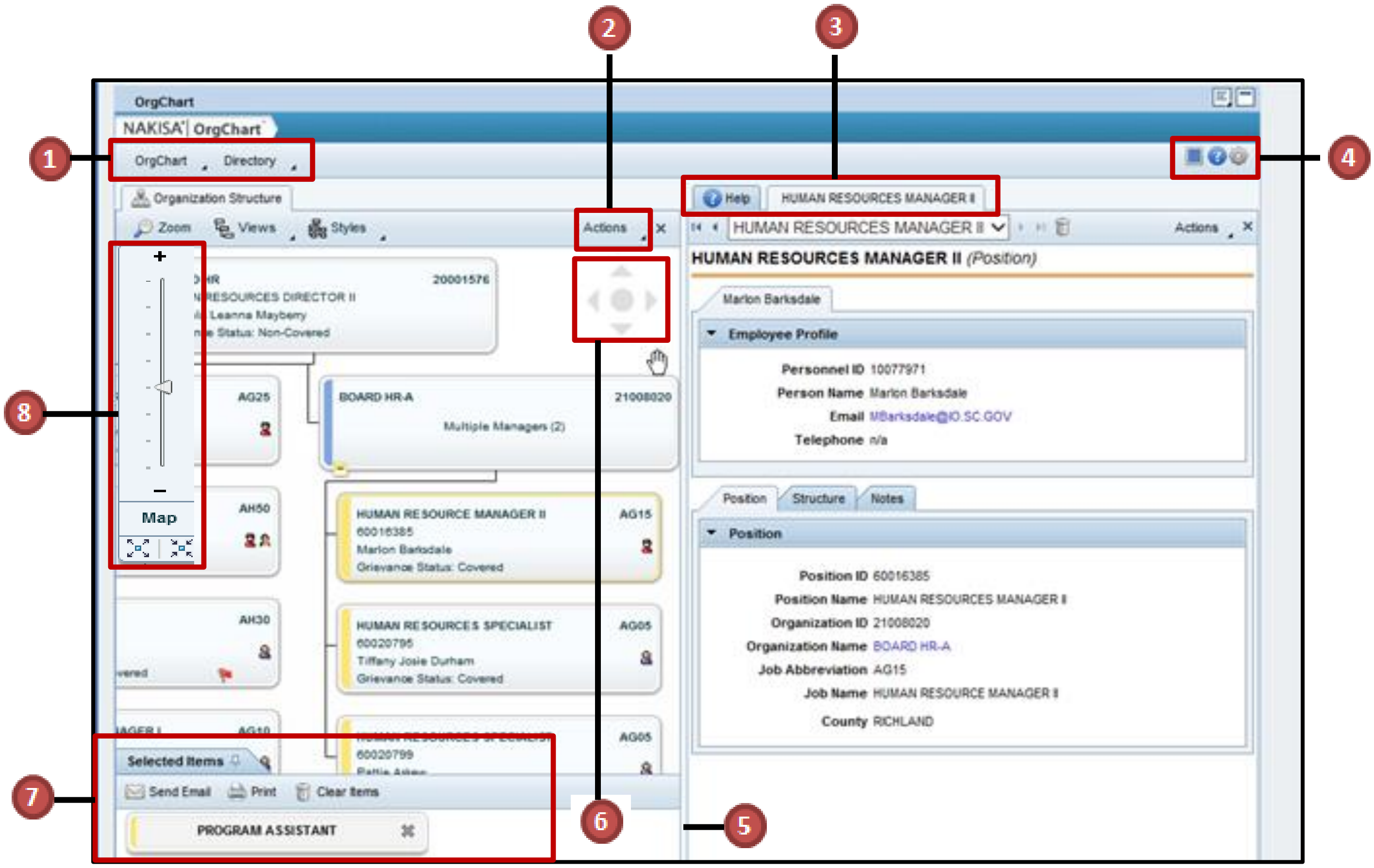
1.1 Accessing Nakisa

1. Go to the **SCEIS Central login page** https://sceiscentrallogin.sc.gov.
2. Enter your **SCEIS Central User Id** and **Password**.
3. **Check the box** beside “Check here to login and accept the Terms & Conditions.”
4. Click **Log on**.
5. Click the **Other Applications** tab at the top of the screen.
6. Click the **Nakisa** tile.



To access the Nakisa tile in SCEIS Central a user must be assigned the ZHR_OM_NAKISA role. Agency HR Data Owners can submit a User Access Request form to assign this access as needed.

1.2 User Interface Overview

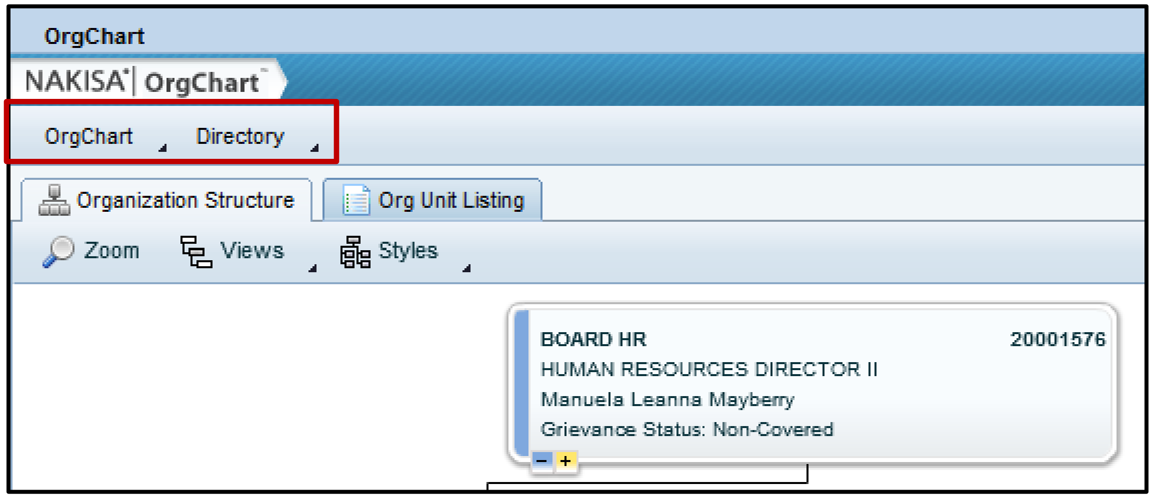


1. **Application menu bar** - Displays the available application menu items that provide access to tasks and features.
2. **Actions menu** - Accesses the tasks you can perform on the org chart, listing or details tab panels.
3. **Tab panels** - Provide a tabbed interface that displays help, feature, task and detailed record information in a contained area.
4. **Global Settings toolbar** - Changes the application interface display, and provides access to the online help and application preferences.
5. **Resizing bar** - Extends the size of a display pane in a two-pane display.
6. **Scroll widget** - Moves the org chart to any area of the display pane.
7. **Selected Items panel** - Provides the tasks you can perform on one or more records. Flag org chart boxes or select check boxes in a listing to add the selected records to this panel.
8. **Zoom panel** - Enables you to adjust the display view of the org chart.

1.3 Application Menu Bar

OrgChart menu allows you to display org charts using org unit or position hierarchical structures.

Directory menu allows you to search for employees, positions and org units.



1.4 Toggling and Resizing Display Panes

Users can choose to view information in one pane or two panes.

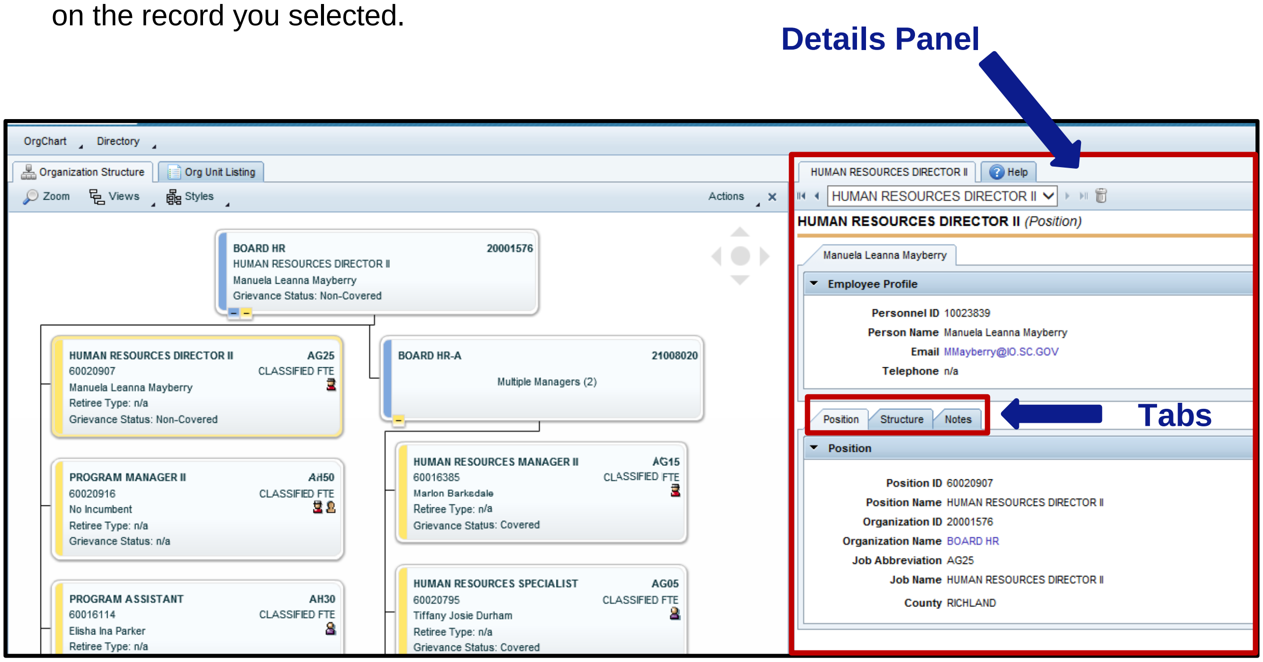
1. To view one pane, click the **One Pane** icon  on the **Global Settings toolbar**.
2. To view two panes, click the **Two Panes** icon  on the **Global Settings toolbar**.

1.5 Using the Details Panel

The Details panel provides more information about the selected record. To view information in the Details panel:

1. Select an org chart from the **OrgChart menu**, or search for an employee, position or org unit listing from the Directory.
2. Click an **org chart box** or **listing record**.
3. The **Details panel** displays additional information about the record.

4. Click the **tabs** in the **Details panel** to view more information. The tabs may vary depending on the record you selected.



2 - Organizational (Org) Charts

2.1 Viewing Org Charts

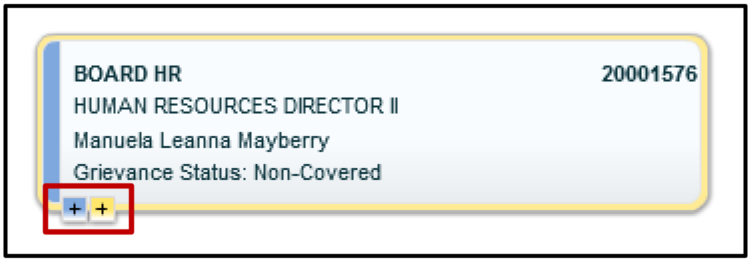
Organization charts (org charts) graphically show the hierarchical authority, roles and responsibilities and relationships in an organization.

Organization Structure - Displays the org unit structure.
Position Structure - Displays the lateral relationship between the positions on the same hierarchical level.

Org Units have a blue bar in the org chart box.
Positions have a yellow bar in the org chart box.

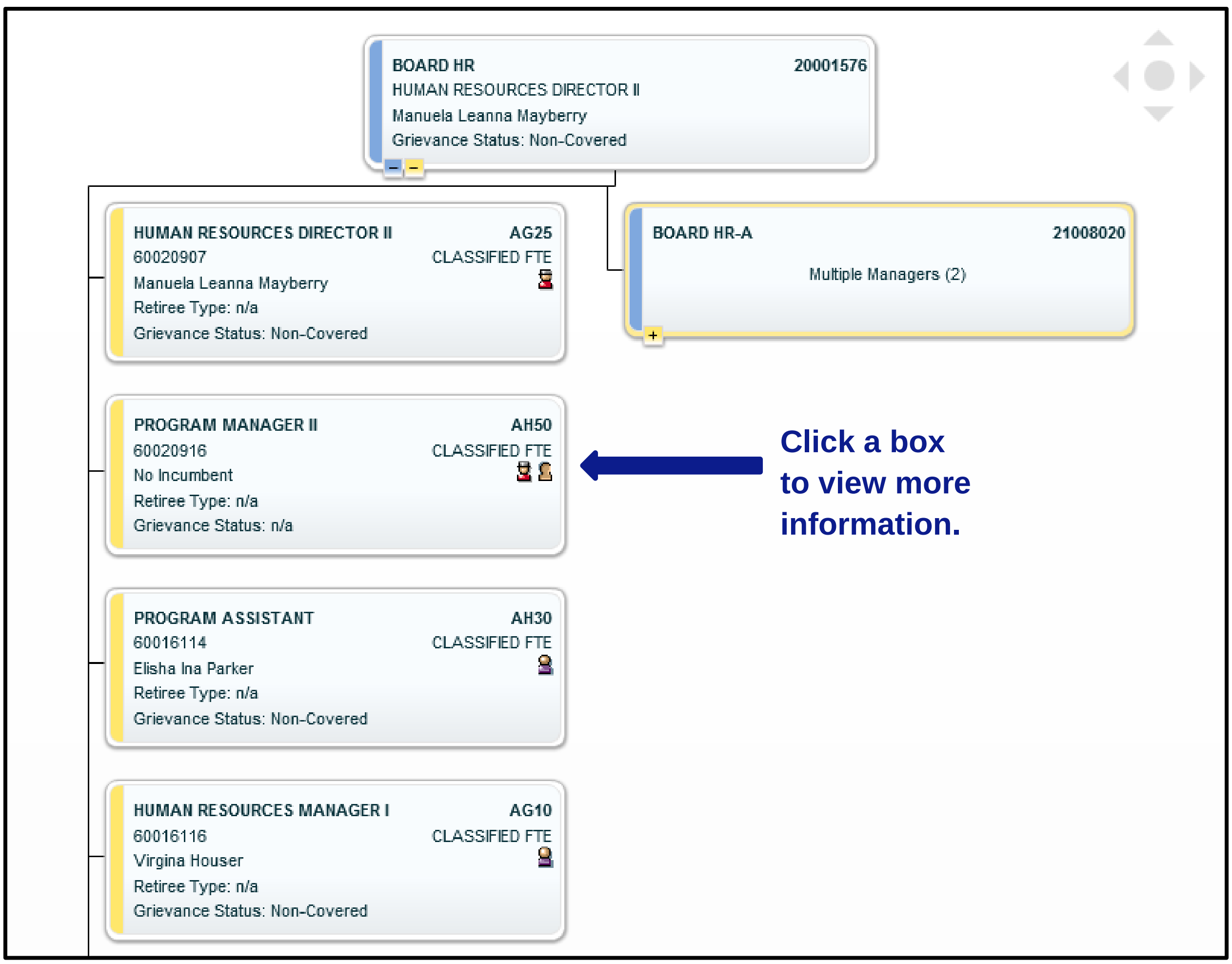
1. Open the org chart you wish to view.

2. Use the **Expand/Collapse** icons  at the bottom of the org chart box to expand/collapse the org chart.
    a. The blue icon will expand/collapse the Org Unit.
    b. The yellow icon will expand/collapse the Positions within that Org Unit.



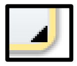
3. Continue to expand the org chart until you reach the required box.

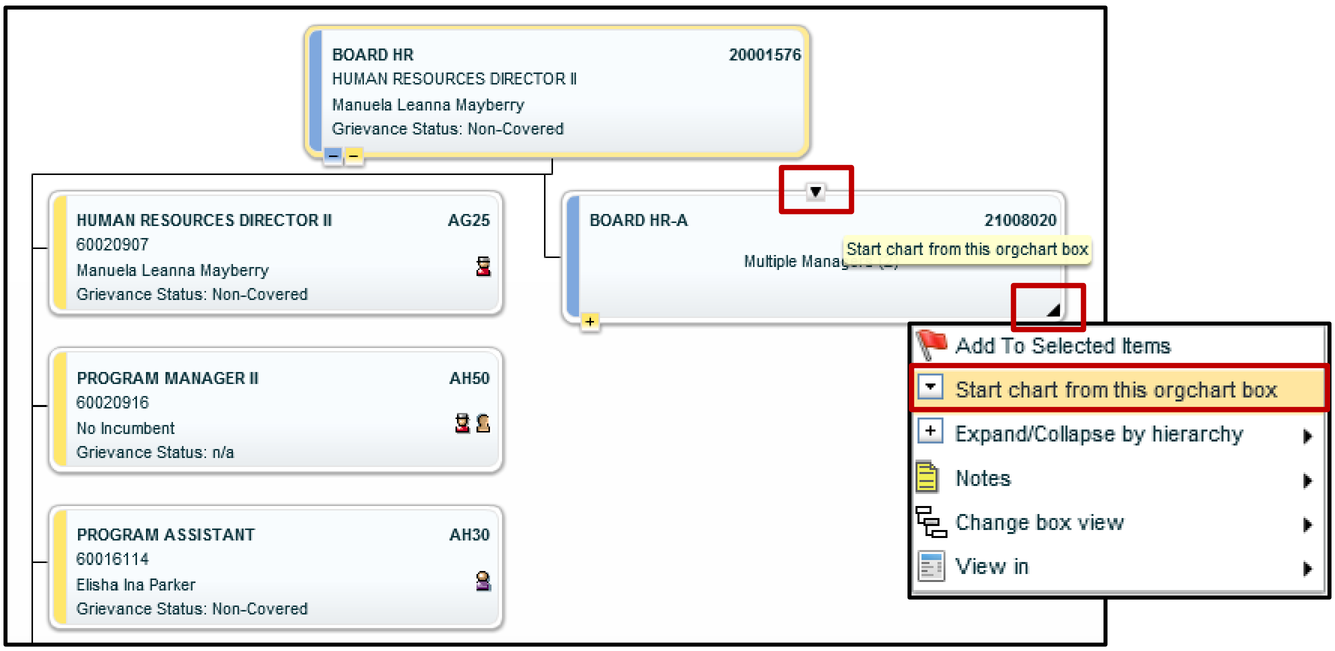
4. **Click a box** to view its information in the **Details panel**.

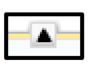


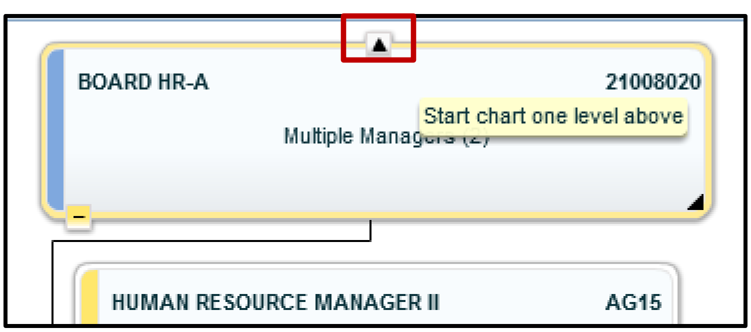
2.2 Setting the Org Chart Root

You can change the starting point of the org chart (org chart root) by selecting the desired box and setting it as the org chart Root.

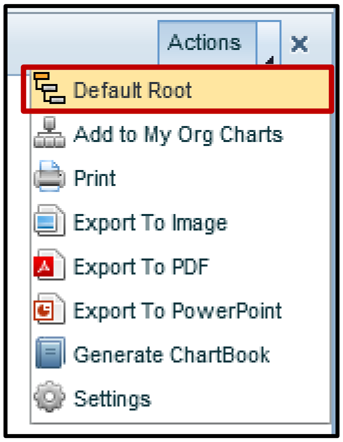
1. **Expand** the org chart to the required box.
2. Click the  icon to start the org chart with the box selected as the root. You can also click the Box Menu icon  and select **Start chart from this orgchart box** to set the box as the root.



3. Click the  icon to start the org chart with the level above the current box.



4. To return to the default root, click the **Actions** menu, then select **Default Root.**



2.3 Changing Org Chart Views

Org chart views change the information displayed in the org chart boxes. There are two views available:

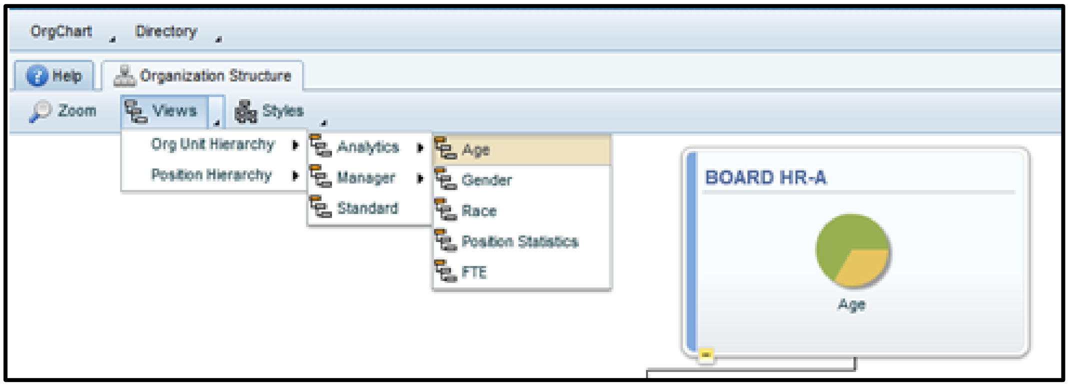
- Org Unit Hierarchy
- Position Hierarchy

1. To change the org chart view, click the **Views menu** button, then select the view you wish to see.

Under the Org Unit Hierarchy view, there are three menu options:

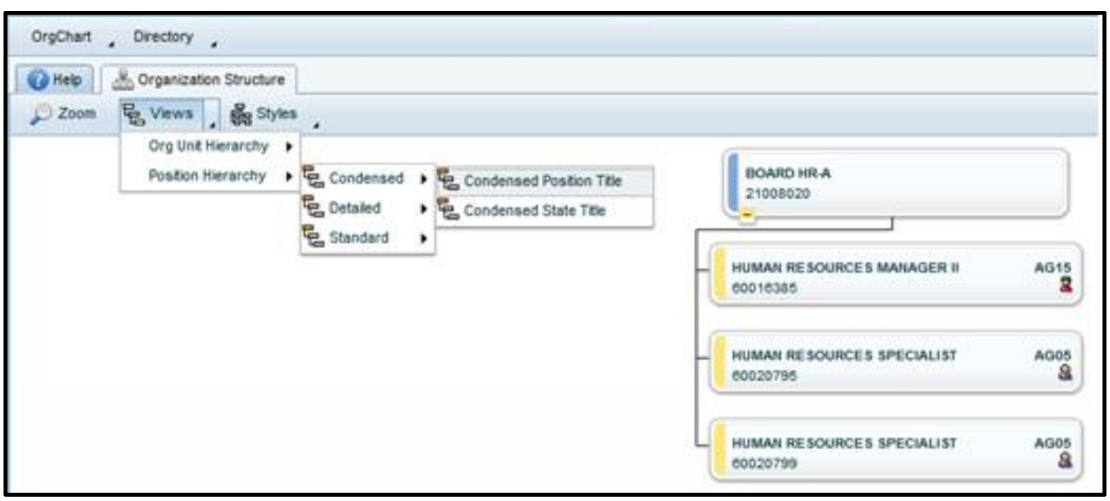
Option:	**Menu Selections:**	**Description:**
Analytics	Age	Displays the total number of employees in each age group.
	Gender	Displays the total number of employees of each gender.
	Race	Displays the total number of employees of each race.
	Position Statistics	Displays the total number of occupied and vacant positions.
	FTE	Displays the full-time equivalents for positions
Manager	Combined Title	Displays the manager's state title, position title, name and grievance status.
	Position Title	Displays the manager's position title, name and grievance status.
	State Title	Displays the manager's state title, name and grievance status.
Standard		Displays the org unit name and ID.

For Example, Age is selected under the Analytics menu below:



Under the Position Hierarchy view, there are three menu options:

Option:	Menu Selections:	Description:
Condensed	Condensed Position Title	Displays the Position Title, Position Number and Class Code
	Condensed State Title	Displays the State Title, Position Number and Class Code
Detailed	Detailed Positon Title	Displays the Position Title, Position Number, Employee Name, Retiree Type, Grievance Status, Class Code and Group, Subgroup
	Detailed State Title	Displays the State Title, Position Number, Employee Name, Retiree Type, Grievance Status, Class Code and Group, Subgroup
Standard	Standard Position Title	Displays the Position Title, Position Number, Employee Name, Grievance Status and Class Code
	Standard State Title	Displays the State Title, Position Number, Employee Name, Grievance Status and Class Code

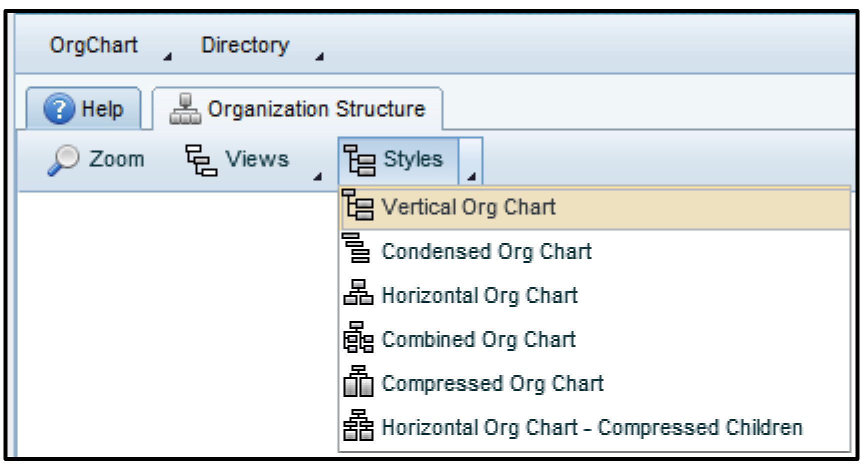


2.4 Changing Org Chart Styles

You can change the appearance and positioning of the org chart by changing the org chart style.

1. To change the org chart style, click the **Styles menu** button, then **select the style** you wish to see.

Org Chart Style:	Description:
Vertical Org Chart	Displays a vertical org chart.
Condensed Org Chart	Displays a vertical org chart with boxes condensed to show just org unit or position name.
Horizontal Org Chart	Displays a horizontal org chart with boxes displayed in the vertical format.
Combined Org Chart (Default Style)	Displays a compressed horizontal org chart with boxes displayed in the vertical format.
Compressed Org Chart	Displays a compressed horizontal org chart with child boxes displayed in a condensed format.
Horizontal Org Chart - Compressed Children	Displays a horizontal org chart with child boxes displayed in the compressed format.



2.5 Setting Zoom Level

Zoom allows you to increase or decrease the size of the org chart.

To set the zoom level:

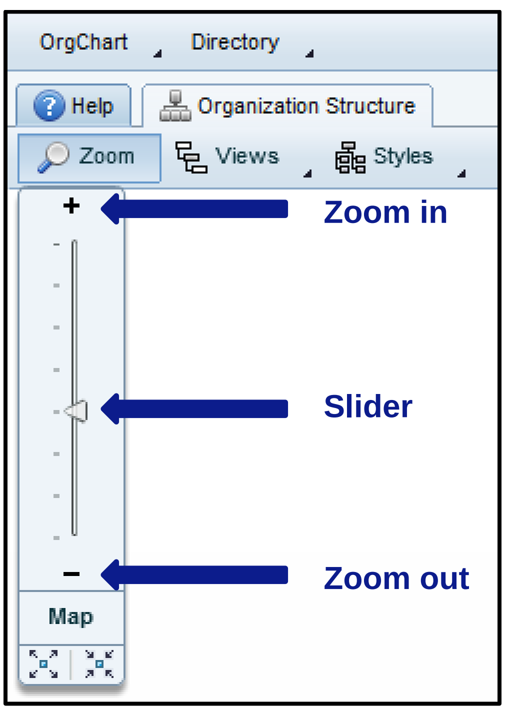
1. Click the **Zoom** button Zoom. The zoom panel expands and remains open until you click Zoom again.

2. To zoom in or out:
   a. **Drag the slider** to zoom to the desired level.
   b. Click the **+ or -** in the panel to zoom in or out by 10%.
   c. You can also **use the scroll wheel** on your mouse to scroll in and out.

3. Click **Fit to Page** to fit the entire chart on the page.

4. Click **Center to Page** to center the org chart on the page.

5. Click **Map** Map to see where the org chart is currently displayed on the page. The red box identifies the current display view.



2.6 Printing Details from Org Charts

You can print the details of one or more boxes in the org chart.

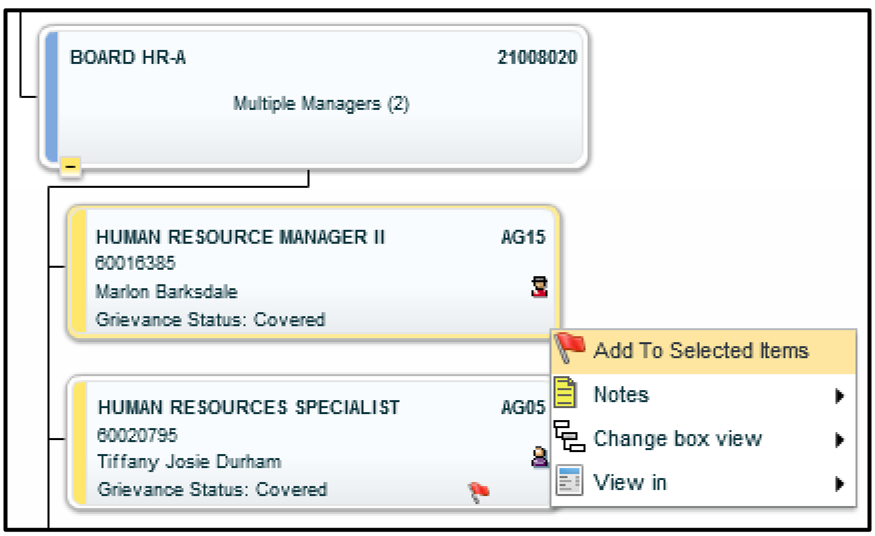
To Print Details from an Org Chart:

1. First, you must **add the box(es)** to the selected items list (also known as “flag”).

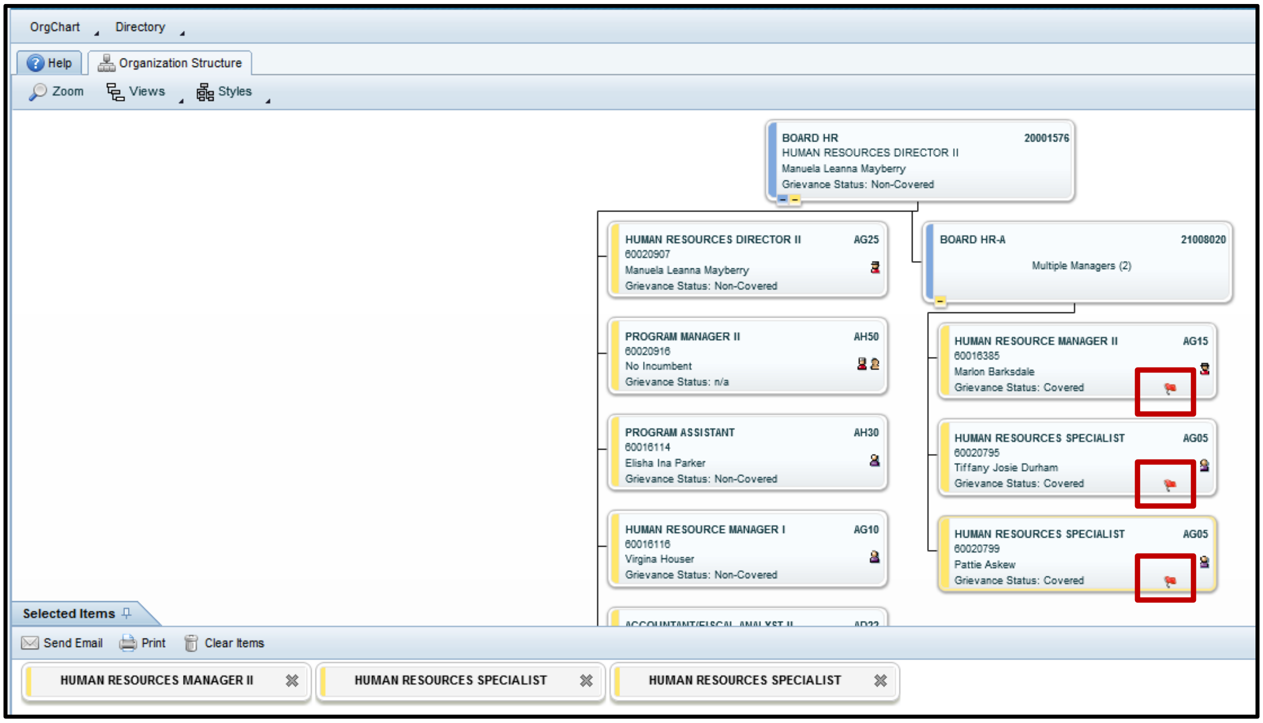
   Note: You can only flag boxes that are the same organizational type. For example, you can only flag positions together or org units together. You cannot flag an org unit and a position together.

2. Click the **Box Menu**  in the lower right corner of the box you wish to select.

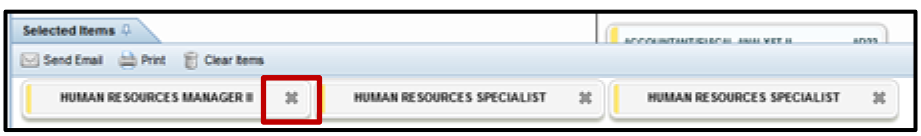
3. Select **Add to Selected Items**.



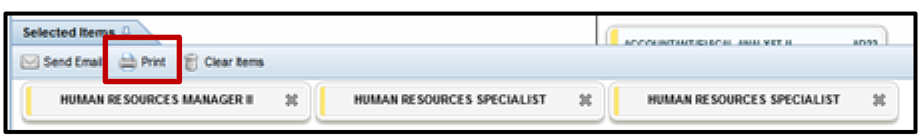
4. A red flag will appear in the box you've selected and the position or org unit title will appear in the **Selected Items panel**.



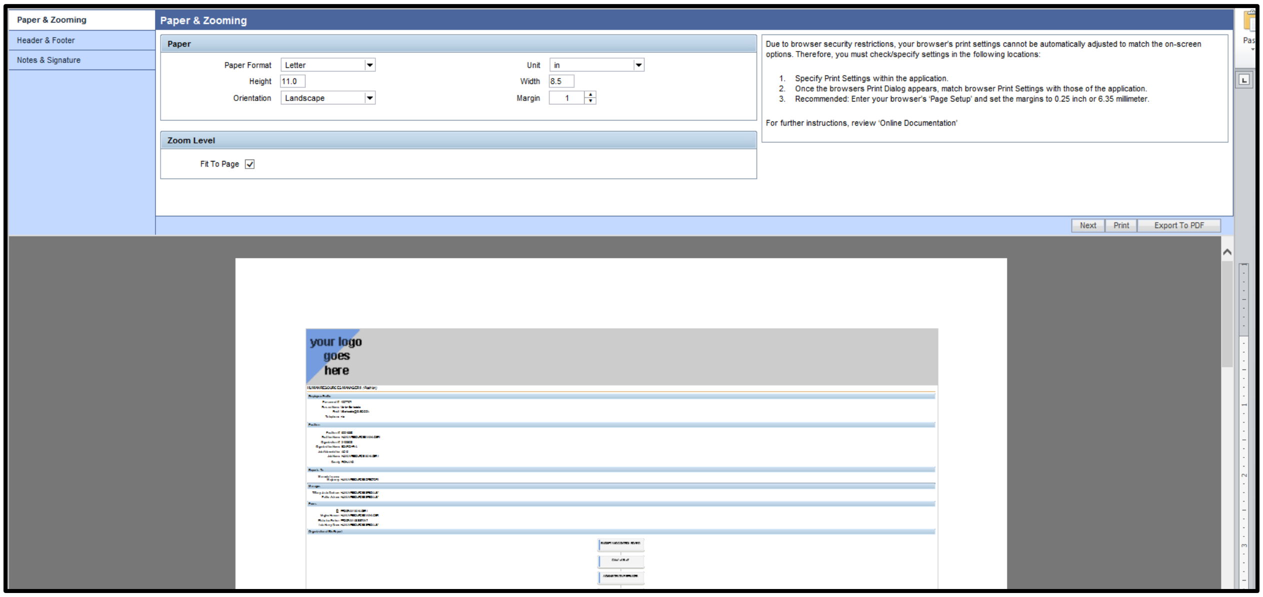
5. To remove a box from the **Selected Items panel**, **click the X** beside the position or org unit title you wish to remove.



6. In the Selected Items panel, click **Print** .



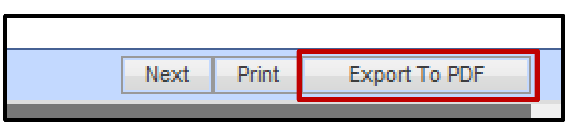
7. A new print window will appear.



8. Change the paper size and zoom level under **Paper & Zooming**.

9. If you would like to add a **Header & Footer or Notes & Signature**, click the appropriate title on the left of the screen.

10. Click **Export to PDF.** *Printing from PDF is the recommended method. If you click the Print button, you must change your printer preferences to match the paper selection you chose in Nakisa.*



2.7 Saving Org Charts

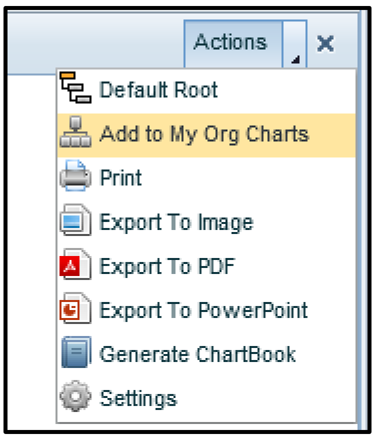
Expanded org charts that are viewed repeatedly can be saved to your user profile. Saved org charts are added in the application menu under My Org Charts.

To Save an Org Chart:

1. Access the org chart you wish to save.

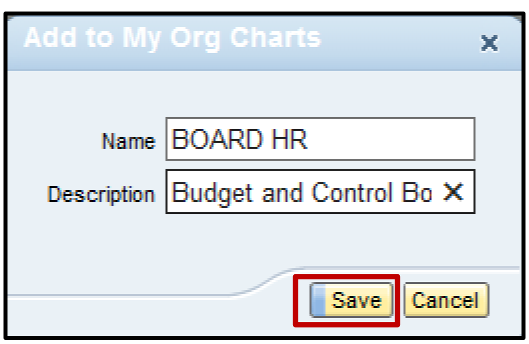
2. Expand and set the org chart to the required root, style and view.

3. Click the **Actions** menu, then select **Add to My Org Charts**.

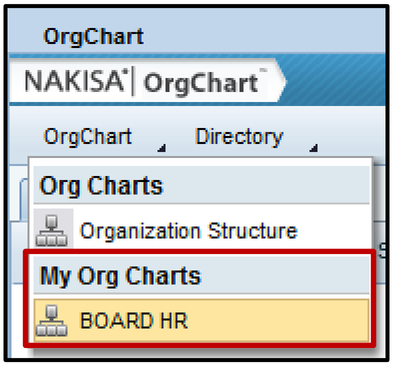


4. Enter the **org chart name** and **description**.

5. Click **Save**.



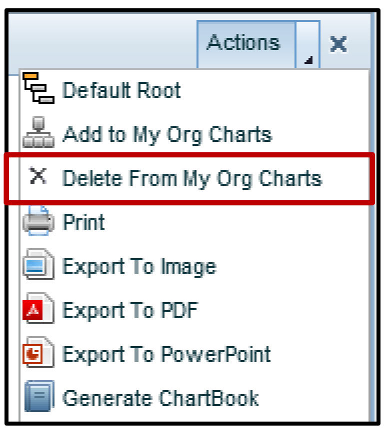
6. The org chart is added under the **OrgChart** menu under **My Org Charts**.



To delete a saved org chart:

1. Select the saved org chart from the **OrgChart menu** under **My Org Charts**.

2. Click the **Actions menu**, then select **Delete From My Org Charts**.



3. Click **Delete** when asked if you are sure you want to delete the saved org chart.

3 - ChartBook

3.1 Generating a ChartBook

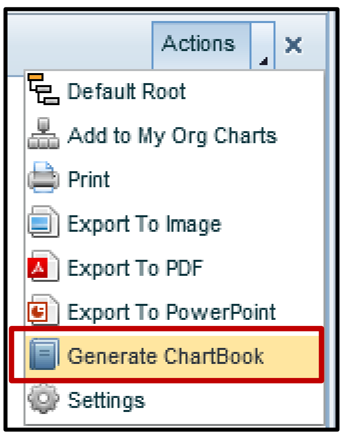
A ChartBook is an interactive PDF document that is used to view individual branches of the organizational structure. Each page displays a different subset of the org chart.

To Generate a ChartBook:

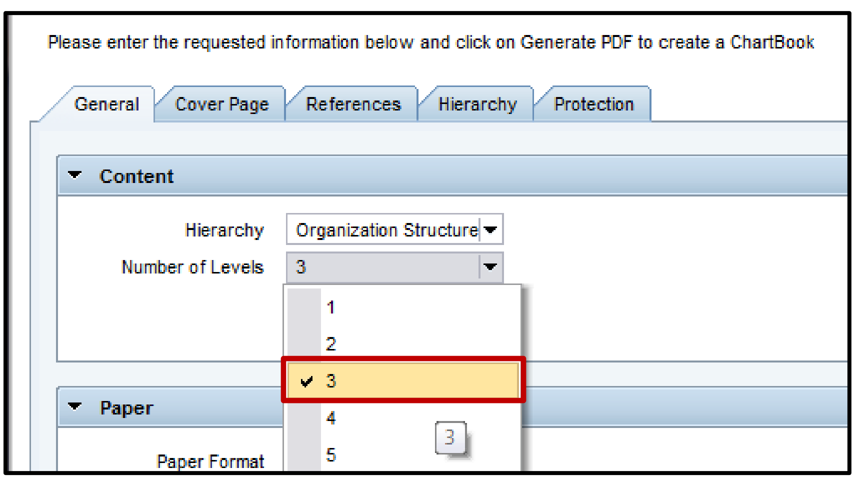
1. Choose the org chart you would like to generate a ChartBook for.

2. If you wish to start the ChartBook from a specific org chart box, expand the org chart to the required record, then set the box to as the org chart root.

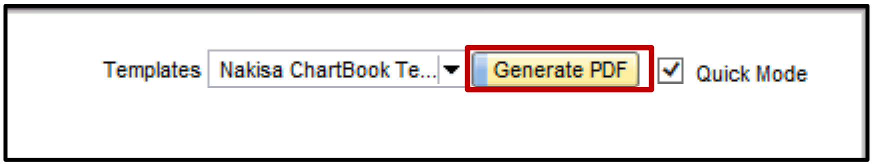
3. Click **Actions**, then select **Generate ChartBook**.



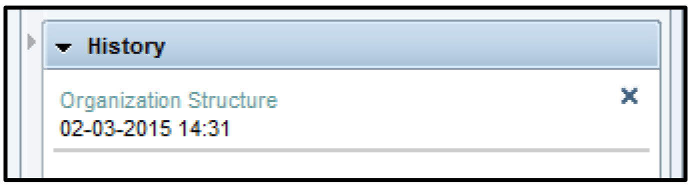
4. Select the **Number of Levels** you would like to see (the depth of the org chart).



5. Click **Generate PDF**. (This may take a few minutes, depending on the amount of data chosen.)



6. When the ChartBook is generated, it will appear in the **History panel**. Click the title of the ChartBook to open it.



7. In the pop-up, click **Open** to view the file, or **Save** to save it on your computer.

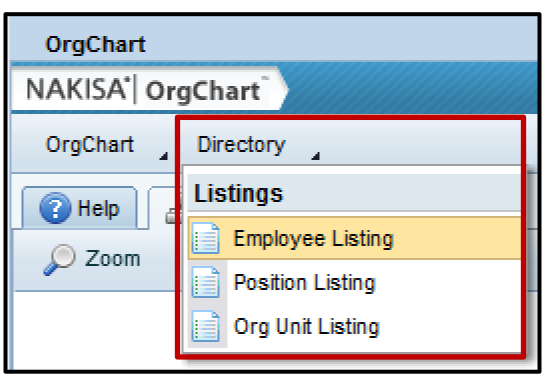
8. You can print the ChartBook from the PDF document.

4 - Listing

4.1 Search Listing Record

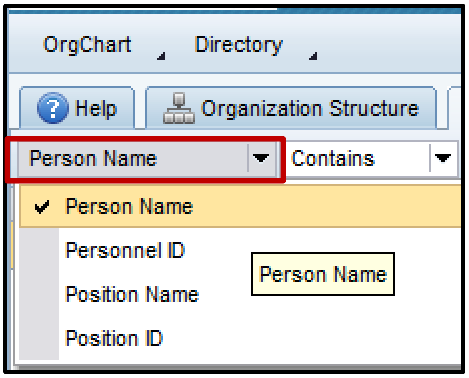
Listings enable users to search for information such as an employee, position or org unit within their organization.

1. Click the **Directory menu**, then select the required listing.



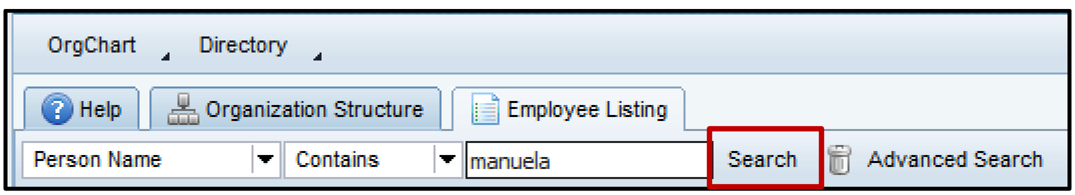
To Perform a Basic Search:

2. Select the required field for the search.



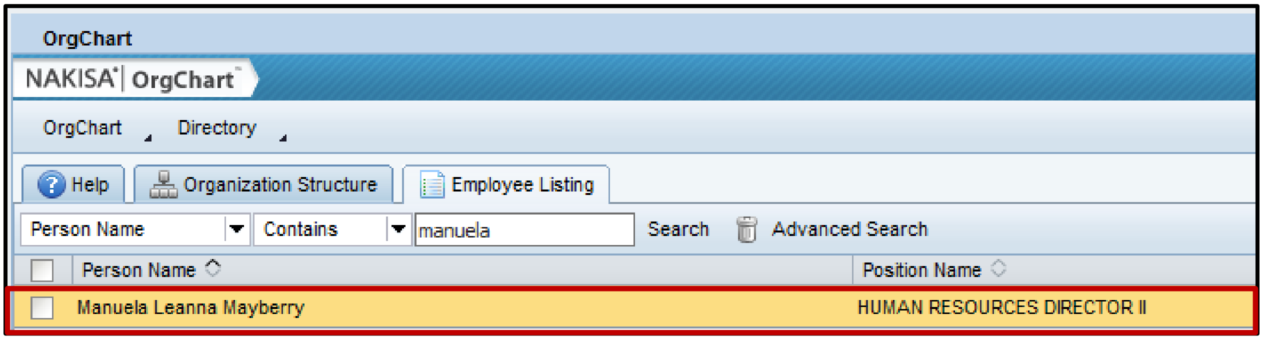
3. Depending on the listing you chose, enter the employee name, position or org unit in the **Search field**. <u>When searching for a person's name, only search for one name, either their first or last name.</u>

4. Click **Search**.



5. Your search results should appear below the **Search field**.

6. **Click a record** to view additional information about the record.



To Perform an Advanced Search:

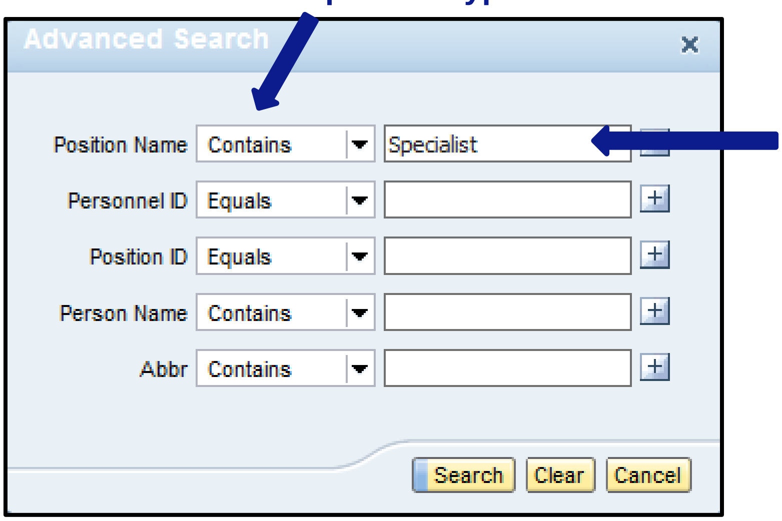
1. Click **Advanced Search** .

2. In the Advanced Search dialog box, **select an operator type** for a field. (Contains, Equals, Begins With, Ends With)

3. Enter your search criteria.

4. Click **Search**.

Select an Operator Type



Enter Search Criteria

5. The search results are displayed below the Search field.

6. Hover over the  icon to display a brief description of the current search filter.

7. **Click a record** to view additional information about the record.

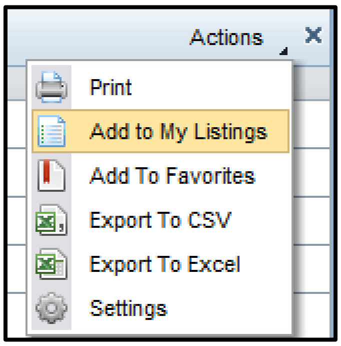
4.2 Saving Listing Search Queries

You can save your search queries to perform an identical search later. Each time you search the database using a saved query, the application generates an updated listing of records based on the latest information stored in the database.

To Save a Listing Search Query:

1. Perform a basic or advanced search.

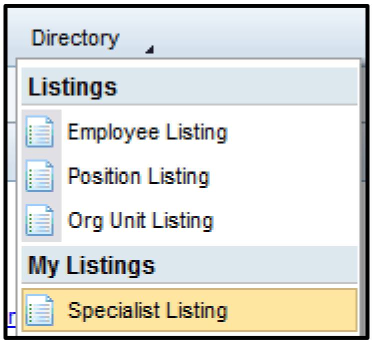
2. Click **Actions**, then select **Add to My Listings**.



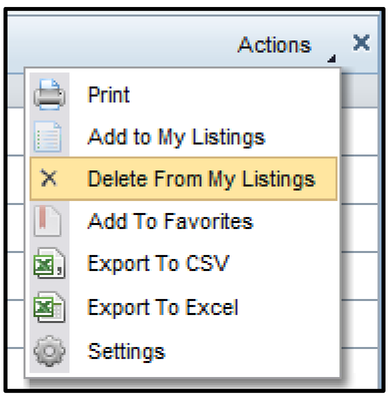
3. Enter the **listing name and description**, then click **Save**.

To Delete a Saved Listing:

1. Click the **Directory menu**, then **select the listing** you wish to delete under the My Listings section.



2. Click **Actions**, then select **Delete From My Listings**.



3. Click **Delete**.