

**Overview:** Org Publisher is a view only visual display of the data in Position Management sorted by the Reports to Position.

If the organization chart does not appear immediately when you click on the link, you may need to install OrgPublisher Plugin X. For installation directions, see Viewing Requirements /Plugin Installation instructions located at: <http://www.csun.edu/hr/orgchart>

Questions may be directed to [pshelp@csun.edu](mailto:pshelp@csun.edu).

### **How to view an organization chart:**

There are several ways to view the organizational structure.

1. Drill down from the President's level by clicking on the down arrow until you arrive at the division/department/area you want to view.

**OR**

2. Use the Search feature by clicking on **Search** icon from the toolbar. Tab to the **All Fields** tab (you can also use any of the other search boxes: name, job title, box title, but all are contained in the **All Fields** so it is the most comprehensive search) and select the field value that you wish to search on. You can search on any of the fields listed in the position box: Position Number, Job Code, Department, Name, etc. Click on the **Search Now** button. Click on the search results line you wish to view. Multiple positions may display, so use care in selecting the desired position. If all of the data is not visible, you can expand the data by clicking on the column and extending it.

**Note:** If searching by name, the system will place a box around the name until you change your view.

The screenshot shows a 'Search' window with a blue title bar. At the top, there are tabs for 'Name', 'Job Title', 'Box Title', 'All Fields', and 'Group'. The 'All Fields' tab is selected. Below the tabs is a search input field containing 'All Fields' and a dropdown arrow. To the right of the input field are 'Search Now' and 'Close' buttons. Below the input field is a 'For' field. Underneath is a 'Match' section with a dropdown set to '= Any Part of Field' and a 'Match Case' checkbox. To the right of the search input is a 'Search options' section with three radio buttons: 'Search under selected box' (unchecked), 'New Search' (selected), 'Add to list below' (unchecked), and 'Search within list below' (unchecked). Below the search options is a table with columns: 'Name:', 'Job Title:', 'Box Title:', and 'Position:'. The table is currently empty. At the bottom of the window, there is a status bar showing '0 people found' and a 'Save as Group' button.

3. The following fields are contained in the position boxes on the organization chart:

**Official Job Title**

**Position Management Number** (except on 2360 positions)

**Working Title** for MPP only (Management)

**Job Class Code/Grade/FTE** (timebase)

**Dept ID**

**Name** (only if filled in a non-pooled position)

**Appointment Type** (only if Temporary)

### Questions on the View:

**Question:** What does the “**AS OF**” date mean?

**Answer:** This is the date when the database was last refreshed.

**Question:** Why is there an arrow under some positions?

**Answer:** The Arrow indicates that other positions report to that position. To view those positions, click on the arrow.

**Question:** Why do some boxes have shadow formatting?

**Answer:** The boxes with shadows are used to identify MPP (Management) Positions.

**Question:** Why don't some positions contain names of incumbents?

**Answer:** Pooled positions (multiple incumbents) and full time Instructors are summarized by the position instead of individually displayed.

**Question:** What does “Actual Field in JOB differs from Position Management” mean?

**Answer:** It means that there is a difference in the field values of job code, grade, or FTE between the Job Record and Position Management record. For example, this would occur when a person is filling the job at half time (.50) when the position is established as full time (1.0 FTE).

**Question:** Why can't I save the chart on my computer?

**Answer:** This is a **view only** tool that represents a snapshot in time.

**Question:** When is the best time to view the charts?

**Answer:** Optimal time is after it is refreshed on the 1<sup>st</sup> of each month, following job and/or position changes that have been processed the previous month.

**Question:** Why are Auxiliary personnel not on the chart?

**Answer:** Currently, the Auxiliary personnel are not contained in PeopleSoft from which the data is extracted. State employees were required to have a state employee to report to.

**Question:** What should I do if the data is incorrect?

**Answer:** You should request a change through appropriate approval channels to be made on the Request for Employee Change in Status form located at the following link:

<http://www.csun.edu/sites/default/files/action-request-form-state.pdf>

**Question:** What is the difference between **wall** and **book** print styles?

**Answer:** Wall style is designed to print the entire chart or single page; book style is designed to print larger sections with multiple pages and has more formatting options. For example, under **Settings**, there is an option to Zoom each page to fit, optimize more (reduce pages), custom headers and footers, and other formatting options.

### How to print an organization chart:

Click on **Print Preview** first because chart sizes are assigned globally and may not fit the chart you wish to print.



You may try a different chart view, which will rearrange the chart based on the structure of the chart.

**Note:** Once you change the design, you may not be able to get back to the original without exiting the program.



### Alternate Chart Views

You can also use the arrow keys to move a section to the left, right, up, or down.

You can center the following header by using the right arrow key.



From:

Office of the President 10001 as of 09/19/2005

To:

Office of the President 10001 as of 09/19/2005

You can also select to print the header row, size of the chart, and number of reporting levels.

### Heading



To print landscape, go to Print/Properties/Paper/Image Orientation/Landscape

