Org Chart Portal- Web Application Launch March 2022

Accessing

- New Link to PDAM Application Portal: http://dotanalytics01/
- Click on Org Chart Portal icon to enter application (1)

Org Chart Portal

Using the Application

- Click on "Data Entry- Head Over" (2) button to enter the data view and data entry section of the app
- You will see all staff in work units to which you have access
- The grey columns are non-editable and come from PMS (3)
- The five white columns are the data entry columns (4)

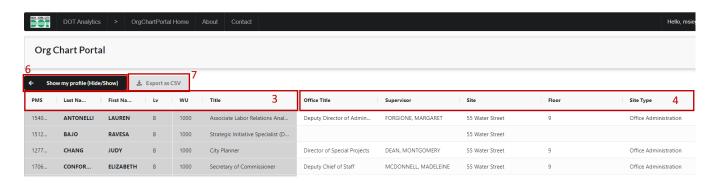
Data Entry

- To edit data, double click in the cell
- The Office Title field is a free text field which you type in to enter data, all other fields are dropdowns- you can begin typing to search for the value you want
- Once you make an entry and click enter or move to another cell, the data automatically saves

Org Chart Portal Welcome! Data Entry Head Over 1 Data Confact

Filter/Sort

- To filter on a column, click on this icon (5) next to the field name
- Select the type of filter you want and enter the filter value
- To sort on a column click on the column name
- The first time you click, it will sort A-Z, if you click a second time, it will sort Z-A



Permissions

- Existing permissions from the legacy system were transferred over to the new application
- Permissions are granted by work unit
- To view the work units you have access to, and the other members of your team who have access to those same work units, click on the "show my profile" button in black (6)
- To request modifications or additions to permissions for your division/unit, contact Yi Zong Kuang (ykuang@dot.nyc.gov)

Export Data

To export your dataset, click on the "Export to CSV" button in grey (7)

Isolating Staff Needing Data Entry Attention

- At the very bottom of the page, there are four features that are designed to help you isolate staff that need data entry updates.
- You can isolate staff who are missing an office title (8), staff that are missing a supervisor (9), and staff that are assigned a supervisor who is inactive (10)
- To reset all filters, click the "reset all filters" button (11)

