U.S. Fish and Wildlife Service
ORGANIZATION CHART EXPRESS

MODULE 1: SCOPE AND RATIONALE (HM/HR/ADMIN)

Module 1: Scope and Rationale (HM/HR/ADMIN)

Welcome

Purpose of this Training

This course is a high-level overview of the Organizational (ORG) Chart Express Management Tool, or OCX, and its features, and instruction on how you will use the OCX module to create Org Charts to meet your annual reporting requirements.

One thing to note is the processes and uses for Organization Charts will not change as a result of the new automated OCX system. Instead, the tool is meant to standardize the format (look and feel) of the Org Charts and to simplify the creation process.

The annual process for Org Chart collection will remain the same:

- October 1st: Managers are required to go into each Org Chart to certify (review and sign) them.
- November 1st: Regional HR collects each of the certified Org Charts from their Region to send to HQ.
- December 1st: Annual Service-Wide Organization Chart package is sent up to the FWS Director.

Length of Training

This course is approximately 90 minutes in length, and is comprised of classroom instruction, exercises that you will work through either individually or in small groups, and scheduled breaks.

Who should take this Training

This training is appropriate for anyone who is new to the OCX module, and who is responsible for creating Org Charts for the US Fish & Wildlife Service.

Agenda:

This is a 90-minute long course, and should approximately follow the below schedule:

Module 1 (Scope and Rationale): 5 minutes
Module 2 (Getting Started in OCX): 15 minutes
Module 3 (Create an Org Chart): 60 minutes
Module 4 (HR Functions within OCX): 5 minutes
Module 5 (Admin Functions within OCX): 5 minutes

Overview of the Training

What you'll be able to do when you complete the training

When you have completed this course, you should be able to login to the OCX module, create a new Org Chart (either Single or Multiple), and then work through the required steps to export, print, and approve the Org Chart for annual submission.

Overview of each Module (e.g. what is covered in each)

Module 1: Scope and Rationale

This module provides information on the training objectives, what users should be able to do when they have completed the training, how long the training takes, and how to use the provided course materials.

Module 2: Getting Started in OCX

This module provides background information on how the Human Capital Management System, or HCMS, links both the PD Express and OCX modules together, and how OCX interfaces with FPPS. You'll also learn how to generate reports in OCX, and search for existing Org Charts in OCX.

Module 3: Create an Org Chart

This module provides you with the information and instruction so that you can create an Org Chart, either with a single Org Code or Multiple Org Codes. You will also learn about the workforce planning aspect of OCX, and how to create an entirely new Org Chart. Also, you'll find quite a few exercises in this module, to ensure that you understand the materials and information presented to you.

Module 4: HR Functions within OCX

This module is intended only for HR and ADMIN users of the OCX module, and provides details on HR functions within OCX.

Module 5: Admin Functions

This module is intended only for OCX administrators, and includes information on admin functions within the OCX module, and support desk features.

About The Course Materials

About this Course

This course is a high-level overview of the Org Chart Express, or OCX module, its features, and instruction on how you will use the OCX module to create an Organization Chart for your organization, which is required to be submitted annually.

This course is approximately 90 minutes in length, and is comprised of classroom instruction, exercises that you will work through either individually or in small groups, and scheduled breaks.

You will notice that this course has common instruction (Modules 1, 2, and 3) that will be used by Hiring Managers, HR, and Administrators, as well as instruction that is specific to HR (Module 4) and instruction specific to OCX Administrators (Module 5). You will only participate in the training that is specific to your individual role.

Course Materials

Your materials consist of a Participant Guide (also called your workbook), and Activity Sheets to help you work through exercises. Since you will be required to use the OCX module upon your return to your duty location, it's important that you take notes, highlight important sections – in order to help you use the OCX module later. Additionally, materials may be downloaded from the Help section of the OCX module, where training is updated, as new information becomes available. This Participant Guide consists of a complete set of information tailored to give you a basic understanding of the purpose and use of the OCX module. And, this Guide is designed to allow you to replace outdated sheets as necessary – so that you can always be sure to refer back to the most updated information available.

Exercises

Throughout this Guide there will be hands-on activities so that you can practice using the OCX module's features and functions as you learn about them. These exercises go hand-in-hand with the Activity Sheets that you have also been provided as part of your course materials.

EXERCISES

Test your knowledge with course exercises that allow you to practice using the JAX module. Scenarios and prompts will be provided in the sidebar for each exercise.

Activity Sheets

The Activity sheets are for you to use throughout the course to complete the exercises that you will need to perform in order to ensure that you understand how to use the OCX module.

On Track and Help Sidebars

There are a few items that you'll see in the sidebar of this guide, which you can use to ensure you understand the information being presented. These are the On Track and Help areas.

On Track

This information is comprised of tips and answers to frequently asked questions about OCX processes, strategies, and rules essential to success within OCX.

ON TRACK….

If you encounter an unexpected issue, check the sidebar for explanations of common misconceptions or business logic.

If you encounter an unexpected issue, check the sidebar for the On Track area, to see if there is a tip, an explanation, or an answer to the question in your mind. Note that the On Track information is provided to help you get back, and stay on track.

Help

This information provides tips on how to use the technology most efficiently and effectively. This includes more detailed information that you might use later, helpful websites, and detailed information that you might be able to use if you get stuck.

HELP

HELP sidebars contain tips and detailed information that you might be able to use if you get stuck.

HCMS Environments

In technical terms, "Environments" are locations in which a given piece of software resides. For HCMS, there are two "environments" – Training, and Production.

The Training environment allows you to practice within the HCMS systems (PD Express, JAX, and OCX) without any of the data that you input actually going "live" or being published to the system of record.

The Production environment, on the other hand, is the LIVE environment which is accessible by all of FWS, and into which actual live PD Express data and FPPS data is fed. This is the system of record, which saves all existing and new Org Charts for FWS, and you should understand that changes to Org Charts made within the Production environment will be permanent (until such time as new changes are made and saved).

The links to the Training and Production environments are:

TRAINING: https://hcms.fws.doi.net/Training

PRODUCTION: https://hcms.fws.doi.net/HCMS

Conclusion

This completes Module 1: Scope and Rationale. You're now ready to get started with Module 2: Getting Started in the OCX.

U.S. Fish and Wildlife Service
ORGANIZATION CHART EXPRESS

MODULE 2: GETTING STARTED IN OCX (HM/HR/ADMIN)

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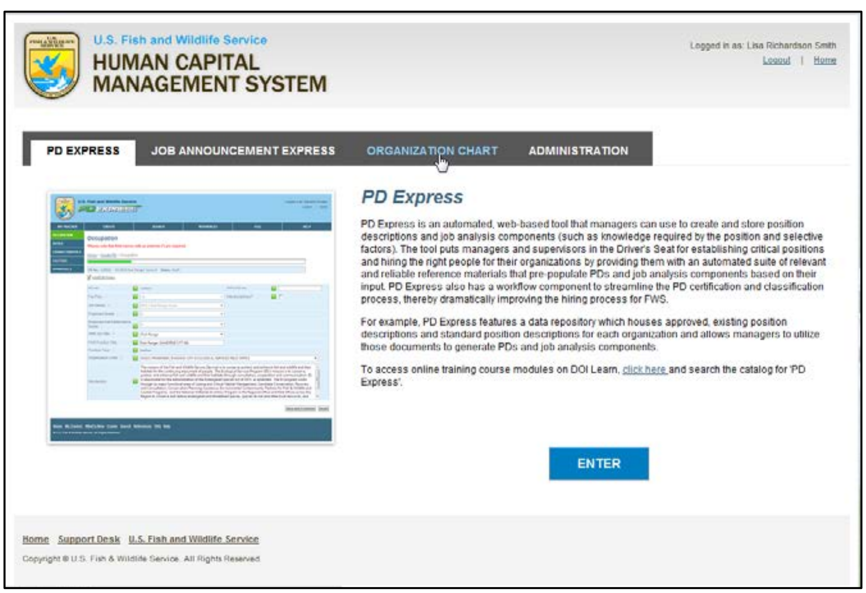
Module 2: Getting Started in HCMS (HM/HR/ADMIN)

Understanding the FWS HCMS System and how FPPS and OCX share data is quite important background information when modifying an existing Org Chart, or creating a new Org Chart. And, it's important to understand the OCX Module and how to navigate in it to ensure that you can use the OCX module to its fullest benefit.

What is HCMS?

HCMS is the Human Capital Management System used by US Fish & Wildlife for the purposes of managing job positions, their descriptions, related open position announcements, and how positions within the organization report to one another and align into Org Charts. Within the HCMS system, there are five modules available – PD Express, Job Announcement Express (JAX), Organization Chart Express (OCX), Workforce Planning, and ADMINISTRATION (for users with Administrative rights). PD Express allows for the creation and storage of position descriptions (such as knowledge required by the position, and selective factors). PD Express allows managers and supervisors to *establish* critical positions and JAX allows these managers and supervisors to *staff* critical positions and hire the right people by providing them with an automated suite of relevant and reliable reference materials that pre-populate relevant data. PD Express pre-populates PDs based on the users' inputs, while JAX pre-populates the job analysis, job questionnaire, and category rating components based on the PD and the user's inputs. Together, PD Express and JAX streamline the defining of the position, and the recruiting and hiring for the position. OCX on the other hand, pulls the data from FPPS and CMT (this personnel information is shared with PD Express and JAX) to display the names and Org Codes of the individuals within a reporting structure at FWS.



How the OCX module interfaces with HCMS and FPPS for FWS Positions

The OCX module and other HCMS modules (PD Express, JAX) share data both with and from FPPS. Where PD Express allows users to input information to define an open position within the organization, JAX takes information such as duty location, duties of the position, and KSAs for the position from the PD in PD Express, and pre-populates them into the job announcement record. This ensures that the two modules work together to define the position (in PD Express) and then quantitatively identify the position for recruiting purposes (in JAX). Once the position data is approved, and the position is staffed, the requisite data about the position (Org Code, Pay Grade, etc.) live in FPPS, and are directly linked back to HCMS modules. OCX pulls the information from FPPS for each encumbered or approved vacant position, and displays that information in the Org Charts that are created. Which means that as data in FPPS changes, that data on the Org Charts will automatically change as well. For instance, name updates will be reflected on the Org Charts, as well as new position information (for new hires and transfers) and positions that are removed from an Org Chart (retires and transfers) will also be reflected.

When an Org Chart is created, there is color-coding within the system to distinguish some positions from others. For instance, in all Org Charts, the top level position is designated with a black header. All other FPPS Positions are designated with a blue header. And Workforce Planning Positions (WFP) – those which are planned for but for which there is no FPPS data – are designated with a red header bar

HELP

For login and access errors, the proper action is to contact your Regional Administrator for assistance.
Click Support Desk on the bottom of the JAX screen to log a request/issue.
You can help your Regional Administrator track the problem more quickly if you provide the error message in your request.

Logging in to OCX

To login to OCX, you must actually login to the HCMS module by accessing https://hcms.fws.doi.net/HCMS/training.

Clicking the Enter button presented when you first come to the Welcome Screen displays the Notice of Monitoring page. Be sure to read the notice, as failure to understand and adhere to the terms of use of HCMS Modules can result in disciplinary action, including job termination. After reading the Notice of Monitoring screen, click the Accept button to indicate your understanding and agreement to comply with the notice.

Your login to the OCX module is synchronized with your Active Directory account (e.g. user_name@fws.gov). Access, modifications, and approvals in OCX are tracked using your login, and it's important to note that if your network password changes, so too will your OCX password.

HELP

For security reasons, HCMS is set to automatically log out inactive users after 30 minutes of inactivity.

To login:

1. **Enter your user name** (e.g. user_name@fws.gov)
2. **Enter your Active Directory password**
3. **Click Login**.

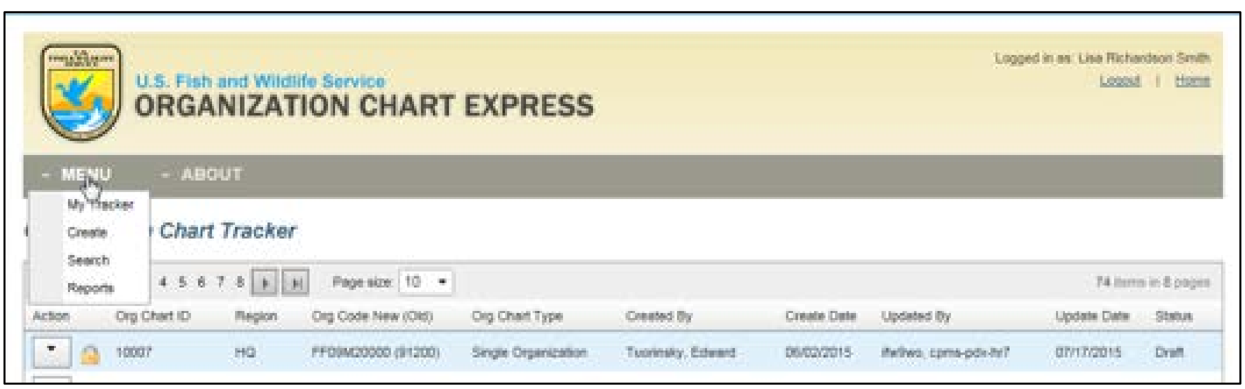
After logging in, you will see the Home Page – which displays either three or four tabs across the top, based on your permissions. At a minimum, you will see the PD Express, Job Announcement Express, and Organization Chart tabs. If your permissions allow, you will also see the Workforce Planning Dashboard and the Admin tab.

1. **Click on the Organization Chart tab**, and you will see a brief description of the module as well as some of the benefits and features of the OCX module.
2. **Click the ENTER button** to enter the OCX module.

After entering the OCX module, you will see the OCX Home Page – which defaults to the display of the MY TRACKER dashboard. This is where you will manage your In-Progress Org Charts, as well as where you will begin to create new Org Charts.

Explore "Menu" Options

Within OCX, there are only two menu items at the top of the screen. These are "MENU" and "ABOUT". Each of these two items has drop-down items that are available for navigating through the OCX Module. Let's explore the "MENU" options:



My Tracker

Once logged in, this is the dashboard that shows the status of in-progress Org Charts. This is where you will manage your in-progress Org Charts.

Create

This section allows you the option of creating an Org Chart, either by creating from an existing published Org Chart, or by creating a completely new Org Chart.

Search

This section allows you to search for information using a Chart ID, or by using the Advanced Search function. Chart ID searches allow you to search by existing Organizational Chart IDs. The Advanced Search allows you to search for an Org Chart using the Region and Org Code – and provides areas to identify the Org Chart for which you are searching in more detail – including areas to enter information such as the Org Chart Type, Chart Status, Series, and Author's First and Last names. Regardless of what method you use to search, search results will appear at the bottom of the Search window.

Reports

This section allows you to run Canned Reports and Custom Reports. Canned reports such as the Executive Organization Chart Report, Regional Organizational Chart Report, Enterprise Organizational Chart Report, and the Green Book Organizational Chart Report are simple PDF files that show the Org Charts for each of these organizational levels. Custom Reports allow you to create a custom report using a Single or Multiple Org code, and select the element(s) that you wish to include in the report. Once choose all of the elements that you wish to include in your custom report, choose the Export button to export the report to Excel, where the requisite information will appear

Explore "ABOUT" Options

Help

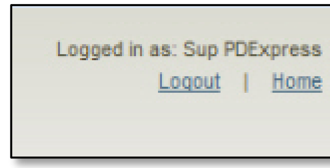
This section includes PDF versions of the OCX training files and any other relevant help files.

What's New

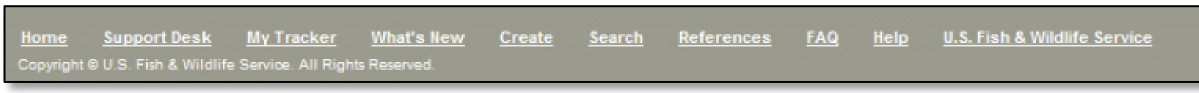
This section provides announcements of new features and functions to the OCX module.

Logout and Home

Finally, there are Logout and Home links in the upper right corner of the screen. Logout allows you to logout of the HCMS entirely. Choosing this logout link will require you to log back in to HCMS if you wish to continue working in OCX. The Home link will return you to the HCMS home screen where you can choose to enter PD Express, OCX, or OCX – or Admin if you have administrative rights.



Links at the bottom of the screen



There are links at the bottom of the OCX window to Home, Support Desk, MY TRACKER, What's New, Create, Search, Reports, Help, and a link to the U.S. Fish & Wildlife home page. These all perform the same functions as those mentioned above, and are provided as a redundant method by which you can access those areas.

ON TRACK....

The **Support Desk** allows users to log requests for administrative activities into the Issue Tracker. The issue tracker allows OCX issues to be logged, to make the Issue Tracker relevant to the entire HCMS System.

**You Try It ** EXERCISE

Login to OCX and Explore the Navigation

Upon completion of this exercise, you will have successfully demonstrated use of your username and password to access OCX. Once logged in, take the opportunity to become familiar with navigation using the menu. Click ABOUT, and then References, FAQs, Help, and What's New. Then click MENU and click on My Tracker, Create, and Search to access respective screens.

YOU TRY IT

1. Access the OCX Training Site at http://hcms.fws.doi.net/training
2. Click Enter
3. Read the Notice and Click ACCEPT
4. Enter your FWS Active Directory Username and Password.
5. Click OK.
6. Click on the OCX Tab
7. Click ENTER
8. Click ABOUT and then browse the links presented there.
9. Click MENU and browse the links presented there.

My Tracker Dashboard – In Detail

Now, let's look at the MY TRACKER Dashboard and Search Function. Note that we won't cover the, Help, or What's New, since those are pretty self-explanatory. And the Create menu option will be covered in detail in Module 3: Create an Org Chart.

ON TRACK….

You can sort the My Tracker dashboard to allow you to more easily find the job announcement you need.

To sort each column, click on the column heading.

A sorted column will display a small arrow icon to indicate an ascending or descending order.

The MY TRACKER dashboard lists Org Charts that are currently in progress and viewable based on account roles and access rights. If you are an Org Chart Developer or Hiring Manager, when you login to OCX the first time, your MY TRACKER dashboard will be empty, since you will have no in-progress Org Charts. Once you get started in the system though, your in-progress Org Charts will display in the MY TRACKER for viewing and/or editing. Now, let's take a few moments to explore the MY TRACKER dashboard.

Action

This column provides a dropdown list of the actions that you can take for each of the in-progress Org Charts listed in the MY TRACKER Dashboard. The options available depend on the Org Chart status as well as your access rights (options include: View, Edit, and Finish Edit, and Delete.) Here is what each of the options mean:

View: Changes cannot be made to the Org Chart; it is in read-Only mode.
Edit: Changes can be made to the Org Chart; it is in Draft format, and has not been submitted for Approval.
Finish Edit: Changes have been started on the Org Chart and you can finish editing; it is in Draft format, and has not been submitted for Approval.
Delete: Deletes an Org Chart from your MY TRACKER dashboard

ORG CHART ID

This column provides an auto generated number unique to each Org Chart. This number is useful when referring to your Org Charts or using the SEARCH function to search for it.

Region

This column provides the Region to which the Org Chart is assigned.

Org Code New (Old)

This column provides the new FBMS Org Code number and the original five-digit Org Code (old organization code) for the same position (for historical purposes).

Org Chart Type

This column identifies whether the Org Chart contains organizational information for a single Org Code, or for multiple Org Codes. Single Org Code charts are those Organizational Charts for which all positions share a single Org Code. Multiple Org Code charts are those Organizational Charts for which the positions do not share a single Org Code. This type of Organization may have two or more Org Codes.

Created By / Create Date

These two columns provide the name of the Org Chart Developer, and the date on which the Org Chart was created.

Updated By / Update Date

These two columns provide the name of the individual who last updated the Org Chart, and the date of the last update.

Workflow Status

This column provides the current workflow status of the in-process Org Charts.

Draft: The Org Chart is initiated by the Developer. The Org Chart Developer and the Supervisor of the Organization can view and edit the Org Chart while in Draft status.
HR Review (Optional): Org Chart Developers and HMs have the option to skip the Review, and directly move to the Approval. If Review is elected, then the Developer, HM, and HR have the ability to edit the Org Chart, but only one user can make updates at a time.
Approval: All users with supervisory status and HR (except Evaluator) have the ability to provide signature approval of Org Charts. At this point, no more edits can be made to the Org Chart. Instead, if a user wishes to edit the Org Chart, it has to be reverted back to Draft Status
Published: The Org Chart is published and is no longer active in the MY TRACKER dashboard.

ON TRACK….

The **Status** of a job announcement determines who can work on it as well as the type of possible action. A JA can be in one of 6 statuses (Draft, Review, Revise, Final Review, Published, and Inactive.)

Org Chart Status

Org Charts progress through 4 statuses during the creation process. Except for the Publish status, these are considered “in-progress” statuses and will appear on the MY TRACKER dashboard. Non-“in-progress” status Org Charts will not appear on the dashboard, but are searchable to users. Let’s review the statuses available in OCX:

Status	Who Can Edit?	In Progress?	Can the Org Chart be deleted?
Draft	Developer, Supervisor, HR	Y	Y
HR Review	HR, Supervisor, Developer	Y	Y
Approval	Supervisor & HR with Supervisor Access	Y	N
Publish	Administrator, Users with access can search and view	N	N

Page Count and Navigation

Although this is not a column like the rest of the items in the MY TRACKER dashboard, it's important to note that the MY TRACKER dashboard displays Org Charts in groups of 10. If you have more than 10 in-progress Org Charts, you will see a numerical listing of pages, as well as navigational icons to allow you to navigate between pages.

ON TRACK....

When **LOCKED**, the JA is only available for editing to the user currently working in the JA. When **UNLOCKED**, the JA is available for access by anyone with proper permissions.

Locked/Unavailable Icon

Although this is not a column like the rest of the items in the MY TRACKER dashboard, this is an important icon on this screen. An Org Chart is created by the Developer or HM, and editable only by that person (unless in Review status). For this reason, only one user has rights to edit the Org Chart at a time. To prevent multiple users simultaneously accessing the same Org Chart, as soon as an individual starts editing an Org Chart, it appears locked to other users, until the individual editing the Org Chart releases the lock by finishing the edits/sending the chart to the next workflow status.. Note that you can mouse over the Locked icon to see who is editing the Org Chart, and how long it has been locked. This is not true.

YOU TRY IT

1. Find the "MY Tracker" Activity Sheet at the back of this manual.
2. Review the data, and respond appropriately.
3. When you have finished, compare your answers to the Answer Key

**You Try It ** EXERCISE

Interpret the My Tracker dashboard

Upon completion of this exercise, you will have successfully demonstrated your understanding of the My Tracker dashboard. Use the screen shot and questions provided in your Activity Sheets to complete this exercise. Write your answers in the spaces provided on the Activity Sheets. When you are finished, the Instructor will review the correct answers with the class.

Generating Reports

Users have access to static reports based on user-based security roles. These static or "canned" reports include Green Book Organizational Chart Reports, Executive Organization Chart Reports, Enterprise Organizational Charts, and Regional Organizational Chart Reports. These reports are in PDF format and are read-only. Users can also create custom reports. We will cover both types of reports in this section.

Canned Reports

Users can access four organizational canned reports. These are high-level Org Charts that give insight on how the Organization is structured. If a user has a specific role (Director, Deputy Director, Regional Director, Deputy Regional Director, Assistant Director, Deputy Assistant Director, Human Capital Officer, System Administrator) they will also have access to these four organizational canned reports with included personal phone numbers. All other users will see only the titles and names of the individuals in the Org Charts. The Canned Charts that can be accessed include:

Green Book Organization Charts Report: Green book organizational charts are charts that give a high level overview of the offices that report to the Office of the Director. Green Book Organization Chart is updated and printed once a year and stored for the purpose of budget justification for each upcoming financial year.

The Executive Organizational Chart Report: The Executive Organizational Chart Report primary function is to provide the Director with direct line phone numbers of the staff in HQ. It is also regularly distributed to throughout the organization to provide a high level view of the service. This report is not considered an official organizational chart and does not require approval or signature.

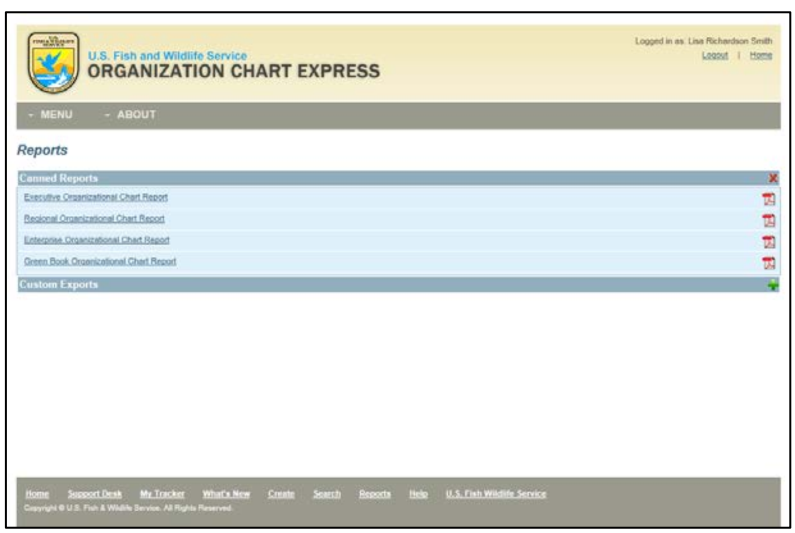
The Enterprise Organizational Chart: The Enterprise Organizational Chart Report primary function is to provide an enterprise view of the offices reporting to the Director.

Regional Organization Chart Report: The Enterprise Organizational Chart Report will provide users with insight on the breakdown of programs in each region that report to Deputy Director.

To Access a Canned Report:

1. **Click MENU**
2. **Click REPORTS**
3. **Click directly on one of the Canned Reports**

Once the widow with the report is opened, you can use the Adobe controls at the bottom of the window to Save or Print the Canned Report's .pdf Org Chart.



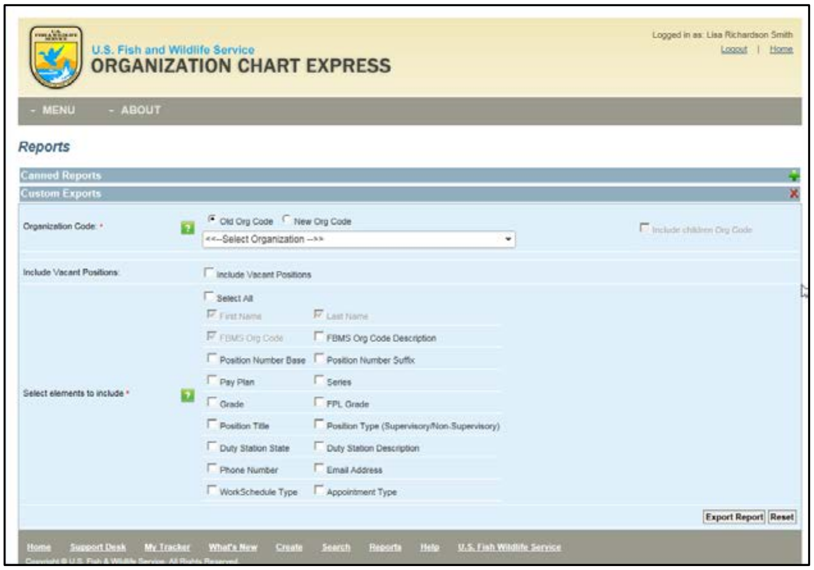
Custom Reports

Custom Reports allow users to create custom reports using an org code, and select other element(s) to include in the report. Once all of the elements to include in the custom report are selected, the report can be exported to Excel.

Custom Reports allow you to find the names, emails, phone numbers, etc., of every position/person in your organization code, and can be helpful when you need that information.

To Create a Custom Report:

1. **Click MENU**
2. **Click REPORTS**
3. **Click the Custom Reports header**
4. **Select the top-level Organization Code for the Organization(s) that you want a report on.**
5. **Determine whether to include Vacant Positions**
6. **Select other Elements to include in your Report**
7. **Click EXPORT REPORT**



A dialogue box will appear asking whether you prefer to Save your Report, or simply Open it.

8. **Choose OPEN or SAVE from the Dialogue box.**

The Report will open as an Excel Spreadsheet and will include the names and Organization Codes of individuals within the Organization Code that you chose. Any additional information (such as Position Title, Pay Grade, etc., will also be included in the report.)

Searching for Org Charts

ON TRACK….

You can only search for Org Charts in Org Codes to which you have access.

Searching for Org Charts allows you to find published/in-process Org Charts so that you may update your Org Charts as necessary, or use them as the basis for creating a new Org Chart. Note however, that your search capabilities are limited to the Org Codes to which you have access. There are two ways that you can search for Org Charts – by using the Chart ID, or by using the Advanced Search function. We'll tell you about both here.

Chart ID Search

The Chart ID Search function allows you to simply type in the number of the Org Chart, and click SEARCH. If results are returned that match your search criteria, they will be displayed to you.

To Perform a Chart ID Search:

1. **Click MENU**
2. **Select SEARCH**
3. **Type in the ORG Chart ID Number**
4. **Click SEARCH**

**You Try It ** EXERCISE

Perform a Chart ID Search

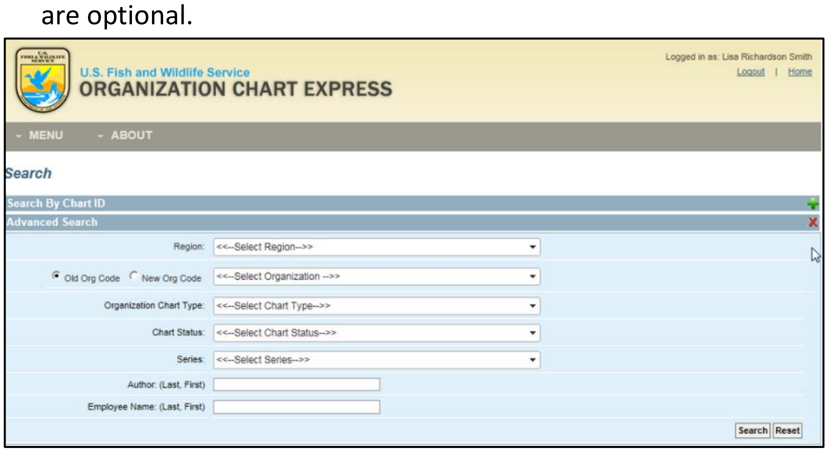
Upon completion of this exercise, you will have successfully demonstrated a Chart ID Search in OCX.

YOU TRY IT

1. Find the "Chart ID Search" Activity Sheet at the back of this manual.
2. Review the data, and respond appropriately.
3. When finished, compare your answers to the Answer Key

Advanced Search

The Advanced Search function allows you to define specific criteria for your search. You must choose the Job Series and Status of the job announcement when using this Advanced Search function, and you can choose whether to define the Grade, OPM Title, Region, Org Code, Author, and whether the announcement resulted in a successful hire or not, although those fields are optional.



To Perform an Advanced Search:

1. **Click MENU**
2. **Select SEARCH**
3. **Select Advanced Search**

At this point, you can choose which search criteria you wish to use. You can search by Region/Org Code, by Org Chart Status, by Author, by Published Year, by Employee Name, or by Series. Note that the Region and Org Code will only allow you to search within Regions and Org codes to which you have access.

Search by Region and Org Code:

1. **Enter the Region and Org Code of the Org Chart** for which you are searching. If you only have access to a single Region code, then that field will automatically populate. The ORG codes from which you can chose will list only those to which you have access.
2. **Click the SEARCH button.**
3. Your results will be displayed.

Search by Org Chart Status:

1. **Choose the Org Chart Status from the CHART STATUS dropdown**.
2. **Click the SEARCH button**.
3. Your results will be displayed.

Search by Author:

1. **Type the Last Name, First Name of the Org Chart's Author into the Author field.**
2. **Click the SEARCH button.**
3. Your results will be displayed.

Search by Published Year:

1. **Choose Published from the CHART STATUS dropdown**.
2. A new field, PUBLISHED YEAR will appear.
3. **Select the published year from the PUBLISHED YEAR dropdown**.
4. **Click the SEARCH button**.
5. Your results will be displayed.
6. Note that for historical data, you will only see the most recent published chart from previous years.

Search by Employee Name:

1. **Type the Last Name, First Name of the Employee into the Employee Name field.**
2. **Click the SEARCH button.**
3. Your results will be displayed.

HELP

Note that the results of each Org Chart search will display only the Org Charts within the Region and Org Code will to which you have access.

Search by Series:

1. **Choose the Series from the Series dropdown.**
2. **Click the SEARCH button.**
3. Your results will be displayed.

**You Try It ** EXERCISE

Perform an Advanced Search

Upon completion of this exercise, you will have successfully demonstrated use of the OCX Advanced Search Function.

YOU TRY IT

1. Click MENU
2. Select SEARCH
3. Click Advanced Search.
4. Choose your Region and Org Code.
5. Click SEARCH.

Advanced Search Results:

The returned results will be displayed in descending order of approval date/date created. When reviewing the results of an advanced Search, you can view the Org Charts that are returned in the results, and sort these results by clicking on the column headers to sort by Chart ID, Region, Org Codes, Chart Types, Created By, Date Created, Updated By, Date Updated, and Status.

Search Results

ACTION	JAX ID	ORG CODE	SERIES	GRADE	OPM TITLE	UPDATED	STATUS	DOCUMENT
	1002	95220 | FF09B12000 | BRANCH OF HUMAN RESOURCES	201	11	Human Resources Specialist	09/16/2013	Draft	
	1003	95220 | FF09B12000 | BRANCH OF HUMAN RESOURCES	201	11	Human Resources Specialist	07/24/2013	Draft	
	1004	10100 | FF01G00000 | OFFICE OF THE REGIONAL DIRECTOR	201	11	Human Resource Specialist	07/25/2013	Draft	
	1005	10100 | FF01G00000 | OFFICE OF THE REGIONAL DIRECTOR	201	11	Human Resource Specialist	08/13/2013	Draft	
	1006	10100 | FF01G00000 | OFFICE OF THE REGIONAL DIRECTOR	201	11	Human Resource Specialist	07/26/2013	Draft	

1 2

Page 1 of 2, items 1 to 5 of 6.

The ACTION column that displays in the SEARCH RESULTS provides a dropdown list of the actions that you can take for each of the returned results. The options available depend on the Org Chart status as well as your account settings (options include: View, Edit, Finish Edit, and Delete.)

The DOCUMENT column that displays in the SEARCH RESULTS provides a dropdown list of the actions that you can take for each of these returned results. The options available include Print PDF and Export to Excel.

Printing Your Search Results

Whenever you have completed your search, and have the results, there are two ways that you can print your Search Results. The first is to **choose the Print PDF link** under the Document drop-down. A new window will appear and will show the actual Org Chart. **Choose the Export the Preview below to PDF** link in the upper right corner of this window to export the Org Chart in pdf format.

Once the report is exported to PDF, you will get a dialogue box that will ask if you wish to Open or Save the pdf. **Choose OPEN** and then use the Adobe Reader controls to print the pdf file.

NOTE: There is an alternate way to extract that PDF. That is by choosing **VIEW** from the Action drop-down, and then Choose **View this Organization Chart in Current State** link from the header bar. Then, choose the **Export the Preview below to PDF link**.

The second method to print your Search Results is to Export the results to Excel. This provides you with a pre-defined list of fields (name, series, grade, etc.) for each position on the last published Org Chart. To print to Excel, **Choose the Export to Excel link** under the Document drop-down. A dialogue box will appear, asking if you want to Open or Save the Excel document. **Choose OPEN** and then use the Excel controls to print the file.

Note: New and excluded positions will not appear in the Excel report.

For a full listing of all current positions in an Organization, **Choose REPORTS from the MENU dropdown**. Then, choose Custom Reports, and generate a report from there.

Interpreting Org Chart Data

Once you have your Org Chart – from Search or from Creating it – you must be able to interpret the data on the Org Chart itself, to ensure that it is correct. Here are some quick tips:

1. The Top Level Position (Root Node) is always displayed with a Black Header.
2. All FPPS Positions (encumbered and vacant) aside from the Top Level position will displayed with a Blue Header.
3. Workforce Planning positions will be displayed with a Red Header, and the words "Planned Vacancy" unless you specific the name of the individual that will eventually encumber the position.
4. The Information that always displays for a position includes the Name, OPM Title, Series, Grade/FPL Grade (for encumbered positions only), and Appointment Type and Work Schedule (unless the Works Schedule Type is full time, and the Appointment Type is Career [Comp SVC Perm] – in which case the Appointment Type and Work Schedule will not be displayed. Likewise, for vacant positions, only the Work Schedule type will be displayed.

Here is further information on the Work Schedule Types and Appointment Types:

Identifier	Work Schedule Type	Display As
B	BAYLOR PLAN	BLR PLN
F	FULL-TIME	FT
G	FULL-TIME SEASONAL	FT SEAS
I	INTERMITTENT	INTM
J	INTERMITTENT SEASONAL	INTM SEAS
P	PART-TIME	PT
Q	PART-TIME SEASONAL	PT SEAS
S	PART-TIME JOB SHARER	PT JS
T	PART-TIME SEAS JOB SHAR	PT SEAS JS

Appointment Type Definition		
AppointmentTypeCode	AppointmentType	Display As
10	CAREER (COMP SVC PERM)	CAREER
15	CAREER-COND (COMP SVC PERM)	CAREER-COND
20	NONPERMANENT (COMP SVC NONPERM)	NONPERM
25	TERM APPT (COMP SVC) - INACTIVE 12-16-05	TERM APPT
30	SCHED A (EXC SVC PERM)	SCHED A
32	SCHED B (EXC SVC PERM)	SCHED B
34	SCHED C (EXC SVC PERM) - INACTIVE 12-16-05	SCHED C
35	SCHED D (EXC SVC PERM)	SCHED D
36	EXECUTIVE (EXC SVC PERM)	EXEC
38	OTHER (EXC SVC PERM)	OTHER PERM
40	SCHED A (EXC SVC NONPERM)	SCHED A NPRM
42	SCHED B (EXC SVC NONPERM)	SCHED B NPRM
44	SCHED C (EXC SVC NONPERM)	SCHED C NPRM
45	SCHED D (EXC SVC NONPERM)	SCHED D NPRM
46	EXECUTIVE (EXC SVC NONPERM)	EXEC NPRM
48	OTHER (EXC SVC NONPERM)	OTHER NPRM
50	CAREER (SES PERM)	CAREER PRM
55	NONCAREER (SES PERM)	NONCAREER PRM
60	LIMITED TERM (SES NONPERM)	TERM NPRM
65	LIMITED EMERGENCY (SES NONPERM)	EMERG NPRM

Conclusion

This completes Module 2: Getting Started in the HCMS. You should have a thorough understanding of how to login to the HCMS, the different tabs in the OCX module, and how to use the MY TRACKER and Search functions within the OCX module.

MODULE 3: CREATING AN ORG CHART (HM/HR/ADMIN)

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Module 3: Create an Org Chart (HM/HR/ADMIN)

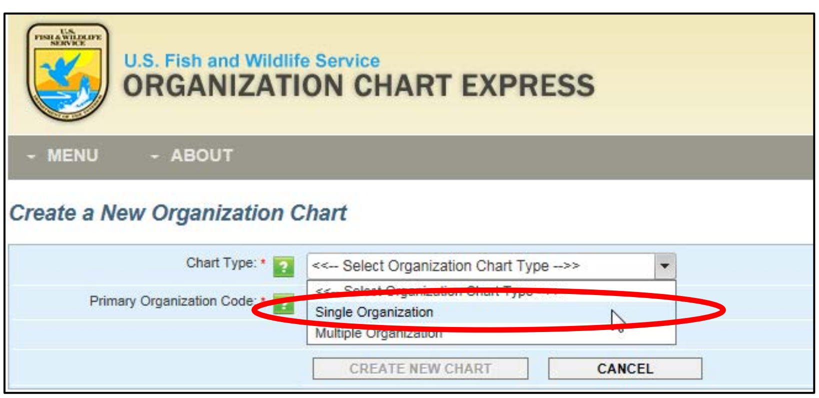
Creating an Org Chart can be done a few different ways, based on the makeup of your organization. For instance, if your organization is only made up of employees from one Organization Code (for example, FF09Z00000), then you will create a Single Org Chart. If, however, your organization chart displays employees from multiple Org Codes (i.e., an AD or ARD plus their Division Chiefs), then you will create a Multiple Org Chart. And, regardless of whether you will use a Single or Multiple Org Codes, there are different ways to create your Org Chart. You can create an Org chart using existing data from FPPS to pull in the individuals that are listed in your organization, based on previously published Org Charts; you can create an entirely new Org Chart for a new organization within FWS, or you can edit an existing Org Chart to add new workforce planning positions and/or update the Reports To information of individuals in your organization.

1. Creating a Single Org Chart

The OCX module allows you to create a single Org Chart from a previously published Org Chart, pulling data from previously published Org Charts and new data FPPS. However, because the information from FPPS is pulled down directly into OCX, the data exchange between FPPS and OCX is transparent to you. All you will need to know is the Org Code, and the Chart Type, and OCX will populate the creation screen with applicable Org Chart information.

To Create a Single Org Chart:

1. Ensure that you are logged into HCMS, and in the OCX module
2. **Click the MENU** item
3. **Select CREATE** from the drop-down list
4. **Choose SINGLE** from the Chart Type drop-down list
5. **Choose the ORG Code** for your Org Chart from the Primary Organization Code drop-down list.



**You Try It ** EXERCISE

YOU TRY IT

1. Click MENU
2. Select CREATE
3. Choose SINGLE from the Chart drop-down.
4. Choose your Org Code from the drop-down.

Create a Single Org Chart.

Upon completion of this exercise, you will have successfully demonstrated the ability to create a Single Org Chart in OCX.

Create a Single Org Chart

The Org Chart Manager screen displays summary level details about your Org Chart. Once a Single Org Chart is initiated, the next step is to review the high-level Org Chart details on this screen. The details include any resolutions that must be made such as Validation Errors or Warnings based on data updates from FPPS (including new or abolished positions); Org Chart information such as the Chart ID, Chart Type, and Org Code/Name; and Additional Org Chart Information such as the Top Level Position in the Org Chart, primary Org Code Location, Workflow Status, and Created/Updated information.

Creating a Single Org Chart – Step-by-Step:

1. **Validate the Org Chart Details** on this screen to ensure that the Chart Type and Org Code/Name are correct.
    a. **Review the Current and Last Published Chart** to compare the two.
    b. **Note any Warning Message and Highlights around New or Abolished Positions** which are not currently reflected in the published chart.
    c. **Validate that the Top level Position is correct and update if incorrect.**
2. **Access Chart Positions screen to review Chart Positions information** and ensure that all position data is correct.
    a. **Include/Exclude positions from the Org Chart.**
    b. **Update Position data** (Reports To, Placement on the Chart, Org position type)
3. **Click Submit to Approval**
4. **Approve & Sign / Publish Org Chart**

Creating a Single Org Chart – Step 1: Validate the Org Chart Details

1a. Review the Current and Last Published Org Chart

It is helpful to compare the last published Org Chart with the current version of your Org Chart. This is because anyone within your organization who has access to edit this chart can change the Org Chart, and it is important to ensure that your Org Chart is correct and valid before submitting it for approval.

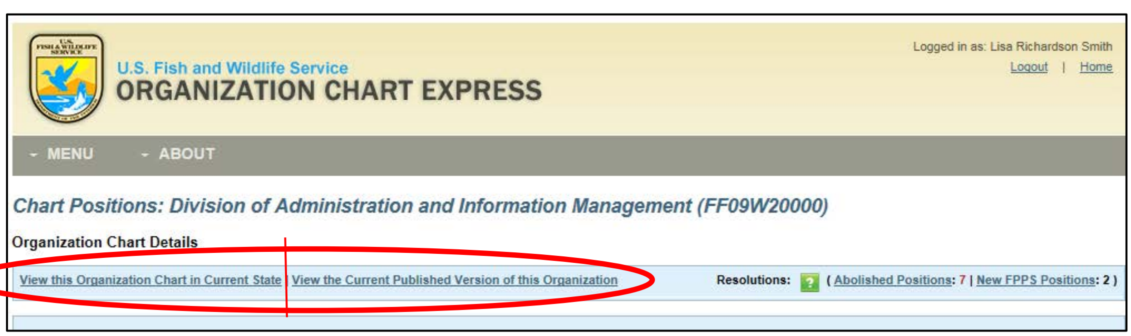
With some Organizations, the Org Charts are quite large, and it might be helpful to print the pdf version of the Current Published Org Chart in order to be able to accurately compare it to the Current Org Chart.

View the Current and Last Published Versions of this Organization

The Current Published Version is the last published version of the Org Chart for your organization. Note that there are two links at the top of each page **View the Current Published Version of this Organization**, and **View this Organization Chart in Current State**. The Current Published Version is the last approved and published version of your Org Chart. The Current State is the Org Chart as it looks today – with any abolished positions, any revisions that you have made to the chart, etc., and may differ greatly from what your last published version looked like. You will want to make sure that you review both versions, to understand any changes since the Org Chart was last published before you send this Org Chart for approval.

1. **Click View the Current Published Version of this Organization** link at the top of the screen. The last published version of the Org Chart will display on screen. For larger organizations, it may be beneficial to export the preview to pdf, and then print it to compare against the current Org Chart.
   1a. Click Export the Preview below to PDF.
   1b. Click Open or Save to either open or save the pdf version of the last published Org Chart. A new window will open with the PDF version of the last published Org Chart shown. From here you can print the PDF using the Adobe Reader controls.
2. **Click View this Organization Chart in Current State** link at the top of the screen. The current (draft) version of the Org Chart will display on screen. Again, for larger organizations, it might be beneficial to export the preview to pdf, and then print it to compare against the current Org Chart.
3. **Compare the last Published Version of the Org Chart to the Current (draft) Org Chart**.

It is important that your current Org Chart reflects all of the reporting positions within your organization and that the reporting hierarchy is correct. Your previously Published Org Chart and your new Draft Org Chart will not always look identical. Instead, new hires, abolished positions, and changes in reporting structures should be reflected in your new Org Chart. If you need to change any of the information in your new (draft) Org Chart, here is how to do so:



1b. Note any Warning Messages and Notes around New/Abolished Positions

ON TRACK….

It's important to note that all abolished position data comes directly from FPPS. You may need to make updates to your Org Chart to ensure that personnel that were assigned to an abolished position have been reassigned accordingly. You should also check to see if there are any new FPPS positions on your Org Chart, because often the staff associated with an abolished position is associated with a new position in your chart (i.e. removal of an old position and creation of a new position to replace it).

Validation Errors and Warnings provide insight into any positions that have been removed (abolished) from the Org Code as well as new positions that have recently been added to the Organization in FPPS. If a position was abolished or added, and you have questions about this, contact your servicing HR Representative. Validation Errors and Warnings will also provide information on all new named positions (encumbered positions) from FPPS that do not currently exist in the Org Chart and need to be added into the Org Chart to display. Abolished Positions that need to be removed, and New FPPS positions that need to be added to your Org Chart are shown in links at the top right of the window. See Step 2a for instructions on how to add new FPPS positions.

Correcting Abolished Positions

Abolished positions are those positions that were removed from the Org Code in FPPS (due to promotions, moves to other organizations, retirements, etc.) Updates on any recently abolished positions are displayed in the upper right corner of the Org Chart Manager screen. Abolished positions will not be automatically removed from your Org Chart. Instead, you will need to acknowledge the removal by selecting the Delete icon next to each of the positions to ensure that a manager is aware that the position was abolished. The system will provide you with a confirmation that will require you to confirm the removal of this position, because once an abolished position is removed, it cannot be added back to the Org Chart. You may also exclude an abolished position from your Org Chart, instead of deleting it. Excluding a position does not delete it from the Org Chart data, but instead simply excludes it from being shown on the Chart once it is created.

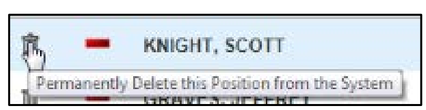
HELP

You cannot delete a position unless it is already abolished, or if it is a Workforce Planning (WFP) position. WFP will be covered in Module 3 Section 3.

To Resolve Abolished Positions:

1. **Click the Abolished Positions** link to the right of **Resolutions** in the header. This will populate the screen with any positions that have been abolished from your Org Chart data.

2a. Click **the Delete Icon** to the left of the Position Title. This will delete the position from your Org Chart and from the underlying data. Note that if you cannot delete the position from your Org Chart, it means that there are valid personnel reporting to the abolished position, and that those personnel must be reassigned before you can delete the abolished position from the Org Chart.



2b. **Click the Exclude Icon** to the right of the Delete Icon. This will maintain the position data in your Org Chart data, but will exclude it from appearing on your published Org Chart. Note that if you cannot exclude the position from your Org Chart, it means that there are valid personnel reporting to the abolished position, and that those personnel must be reassigned before you can exclude the abolished position from the Org Chart. Once an abolished position is excluded it can no longer be included back on the Org Chart, so typically deletion is the best way to remove these positions.

3. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

1c. Validate that the Top Level Position information is correct and update it if necessary

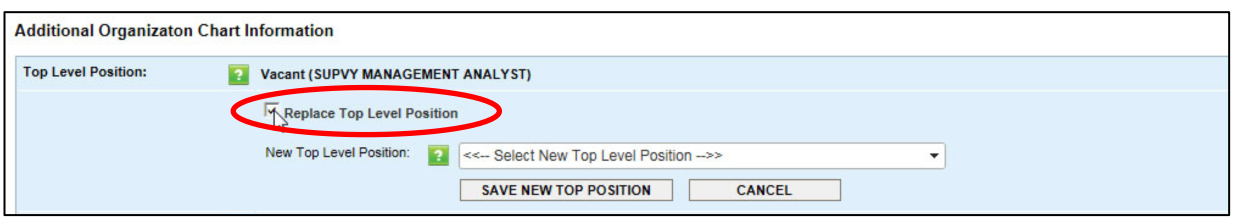
The Root Node or Top Level position of the Org Chart is the highest level position within the Org Chart. This is the position to which all positions within the Org Chart report, through the chain of command. If necessary, you can change the Top Level Position from the Org Chart Manager Screen.

ON TRACK….

Note that changing the Top Level Position within the Org Chart will automatically reassign all subordinate positions to the newly assigned top level position. You will need to revisit the Reports To information for all subordinate/child positions to validate that the appropriate changes have been made to accurately reflect the current organization

To Update the Top Level Position

1. **Click the Replace Top Level Position check box** in the Additional Organization Chart Information area.
2. A new field will appear. **Choose the new Top Level position from the New Top level Position drop-down**.
3. **Click SAVE NEW TOP POSITION**.
4. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.



You have now completed Step 1 of Creating a Single Org Chart. You validated the Org Chart details screen to ensure that the Chart Type and Org Code/Name were correct, reviewed the Current and Last Published Org Charts to compare the two, corrected any abolished positions, and validated/replaced the Top Level position within your Organization. You can now move to Step 2 of Creating a Single Org Chart.

Creating a Single Org Chart – Step 2: Chart Position Information

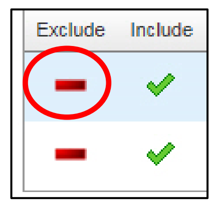
> **HELP**
>
> It's important to note that you cannot exclude a position from the Org Chart if they have any reports/subordinates on the Org Chart (in other words, a position cannot be excluded from the Org Chart, if another position reports to that position). If the position has reports/subordinates, the Exclude column will display "N/A" until you have reassigned all subordinates.

The Chart Positions Screen shows all Associated Organization Chart Positions that appear on your Org Chart. This includes the ability to exclude positions from appearing on the Org Chart, the ability to add Direct Reports to the position (via the Associate Staff link), view the Employee Name and OPM Position title for the position, the Pay Plan/Grade and Series for the position, how many direct reports the position has (in the Child Count column) and whether the position is in the Org Chart hierarchy either as a child (subordinate), or as a parent (supervisor).

2a. Include/Exclude Positions from the org Chart

To Exclude a Position from the Org Chart:

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Positions Screen. You will see a listing of all positions on the Org Chart.
2. To exclude a position from the Org Chart, **click the red line in the Exclude column**.

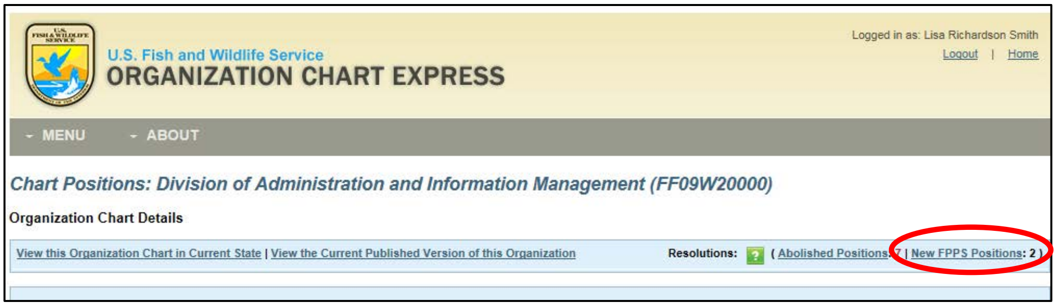


3. A dialogue box will appear asking you to confirm the exclusion. **Click OK** to exclude the position from the current Org Chart.
4. The Position will remain in your organization but will no longer be displayed on the Chart Positions screen (which displays positions on the Org Chart) or on the current Org Chart. To add this position back you will need to click the "✔" sign to re-associate this position with their supervisor and they will re-display on the chart and chart position screen.
5. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the exclusion of the position from the Org Chart.

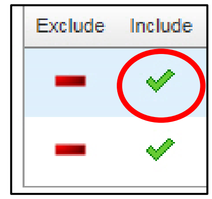
To incorporate new FPPS Positions into the Org Chart:

The New FPPS section contains all new named/encumbered positions that were added to FPPS but do not yet exist in the Org Chart. You will need to add these positions in, and complete their reporting structure in the Org Chart to ensure proper placement.

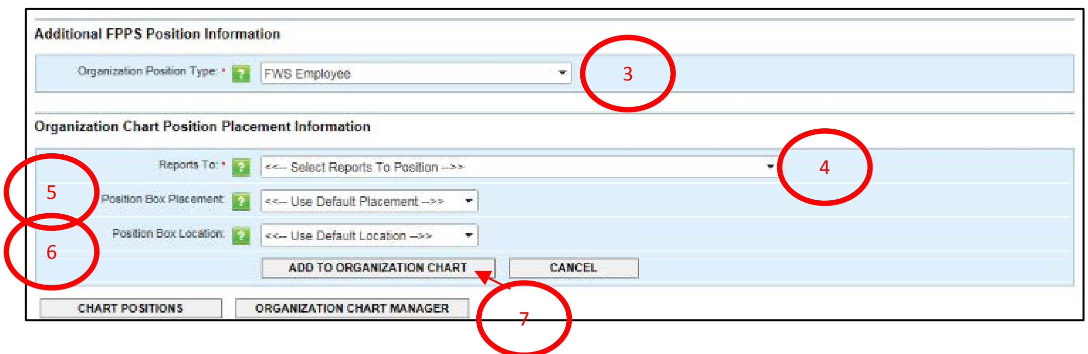
1. **Click the New FPPS Positions** link to the right of **Resolutions** in the header. This will populate the screen with any positions that have been added via FPPS to your Org Chart data.



2. **Click the INCLUDE icon** to include the position so that it appears in your Org Chart.



If you choose to include the position in your Org Chart, the FPPS Position Information screen will appear, and you will have to complete the position information for your Org Chart.



3. **Choose the Organization Position Type** from the drop-down to choose the position type for the employee.
4. **Select the Reports To** information from the drop-down box to indicate who the new employee will report to within the Org Chart structure.
5. **Choose the Position box Placement** location from the drop-down box.
6. **Choose the Position box Location** information from the drop-down box.
7. **Click ADD TO ORGANIZATION CHART** to add the new position to your Org Chart.
8. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

2b. Update Position Data

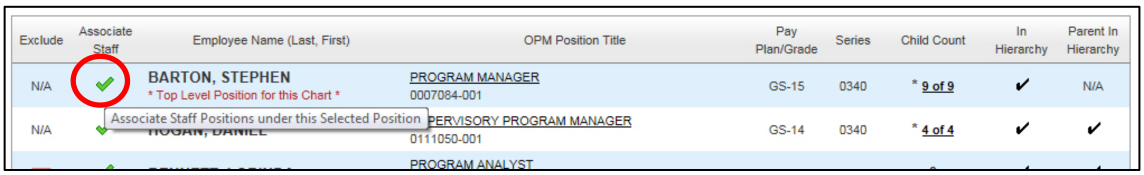
Position Data includes information such as the Reports To information, Organization Position Type (i.e., Branch Chief), and placement in the Org Chart for each position. The Reports To information provides details on the chain of command by indicating the position to which any other position reports. The Organization position Type identifies the position type associated to the position (such as Assistant Director, Regional Director, etc.). The Placement on the Org Chart allows you to change the positon box placement (where the position will appear in relation to its Reports To position), and the position box location (whether you want the position to display on the right or left of the Reports To position.) Unlike with Single Org Code Charts though, where the only positons that can

> **ON TRACK….**
>
> Note that if you have multiple new FPPS positions that will all report to the same higher level position, you do not have to assign the Reports To information for each individually. Instead, you can use the Bulk Update once all new FPPS positions are added to the Org Chart.

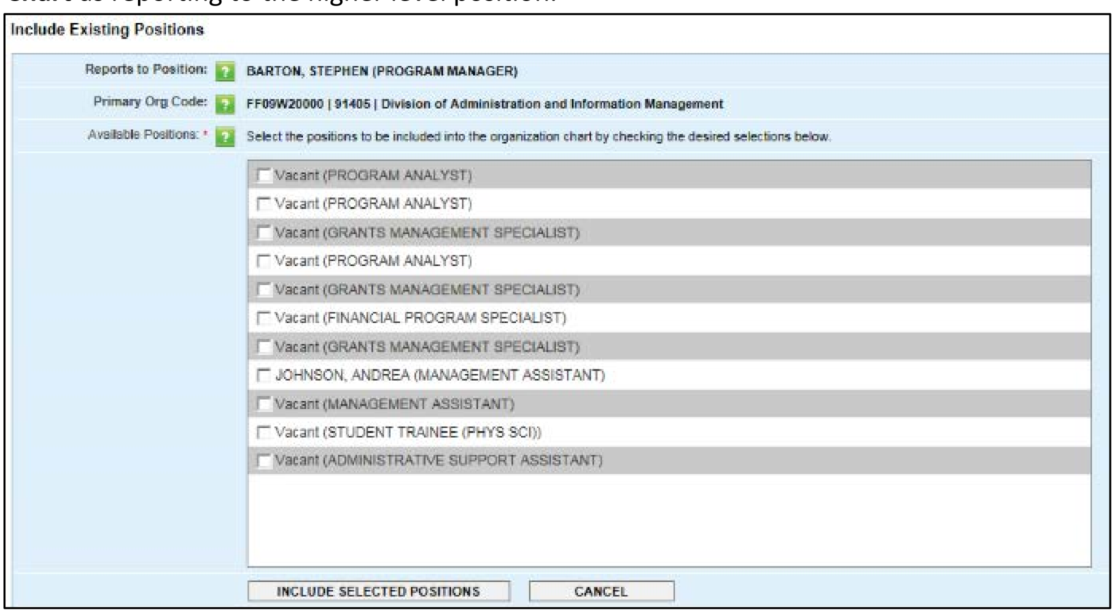
be associated are those within the single Org Code, Multiple Org Code Charts can have associated staff from the any of the child org codes.

Bulk Updates to Revise the Reports/Subordinates to a Position:

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position to which you wish to add reports/subordinates (note the number of reports/subordinates that the position currently has in the Child Count column).
3. To change the reporting structure for a position (we will call this the higher level position), **click on the Associate Staff icon** for the position.



4. The Organization Chart Details screen will refresh to show the positions that can be included into the organization, and report to the higher level position.
5. **Click on the box next to each position in that Org Code that should be shown in the Org Chart** as reporting to the higher level position.

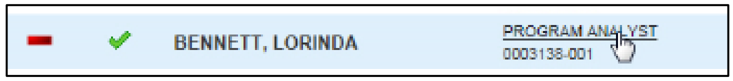


6. **Click the INCLUDE SELECTED POSITIONS** button.
7. **Repeat Steps 5, 6, and 7** for each Org Code that needs to have staff associated**.**
8. Verify that the reports/subordinates that you selected on the previous screen have been added to the Child Count for the higher level position on this screen.

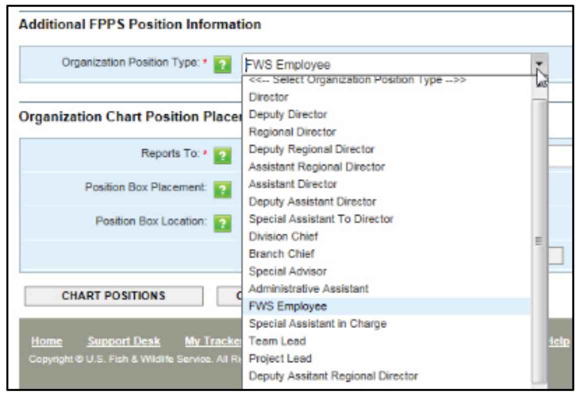
9. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

To Revise the Organization Position Type for a Position

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position for which you wish to change the Position Type.
3. To change the Organization Position Type for a position, **click on the OPM Title** for the position.



4. The Organization Chart Details screen will refresh to show the FPPS position information for the position.
5. **Scroll down to the Organization Position Type Information**.
6. **Click the Organization Position Type** drop-down box and choose the correct Organization Position Type information for the position.



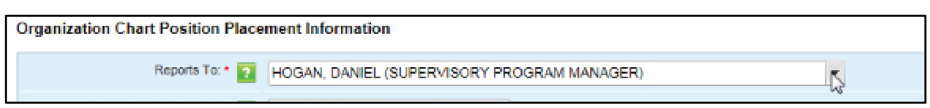
7. **Click UPDATE FPPS POSITION** to update the Organization Position Type for the position.
8. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

ON TRACK….

Changing the Organization Position Type for a position may require you to change the placement of the position within the Org Chart. Also, changes to the Reports to of a position on a Single Org Chart may have impacts on other in-process charts (i.e., a multiple chart for that same organization).

Individual Updates to Revise the Reports To for a Position

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position for which you wish to change the Reports To.
3. To change the Reports To for a position, **click on the OPM Title** for the position.
4. The Organization Chart Details screen will refresh to show the FPPS position information for the position.
5. **Scroll down to the Organization Chart Position Placement Information**.
6. **Click the Reports To** drop-down box and choose the correct Reports To information for the position.

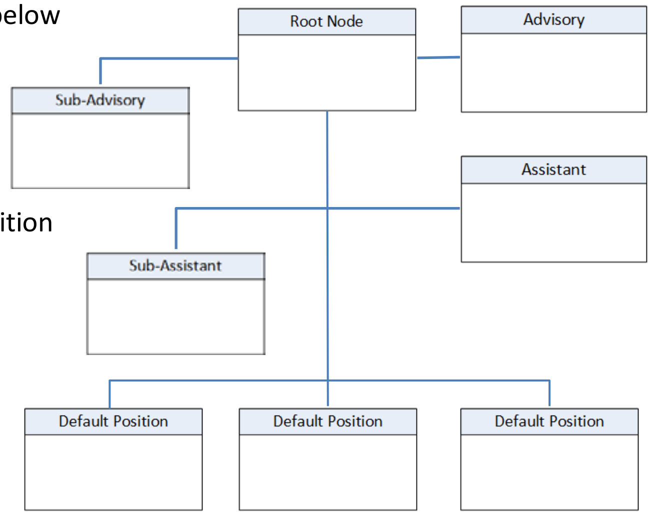


7. **Click UPDATE FPPS POSITION** to update the Reports To Information for the position.

8. **Click on the View this Organization Chart in Current State link** at the top of the page to verity that that the employee/position is now listed as a direct report.

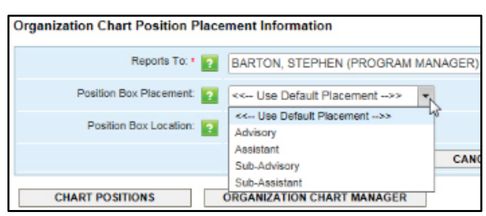
To Change a Position's Placement on the Org Chart

Position Placement is the placement of the position on the Org Chart, relative to the position to which it reports. The potential positions in which a position can be placed include:



- **Regular/Default Position** – which is directly below the position to which it reports, and shows a direct chain of command.
- **Advisory** – which is linked directly to the Right or Left of the position to which it reports, showing an advisory status. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions.
- **Sub-Advisory** – which is below the position to which it reports, but linked from the left or right of the higher level position. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions.
- **Assistant** – which is below and to the left or right the position to which it reports, but linked from the bottom center of the higher level position. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions (e.g. this position serves and reports to its higher level position only.)
- **Sub-Assistant** – which is directly below the position to which it reports. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions.

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position for which you wish to change the placement.
3. To change the Reports To for a position, **click on the OPM Title** for the position.
4. The Organization Chart Details screen will refresh to show the FPPS position information for the position.
5. **Scroll down to the Organization Chart Position Placement Information**.
6. **Click the Position Box Placement** drop-down box and choose the correct position box placement within the Org Chart for the position.



Note that these placements refer to the location that the box will appear in relation to the position to which it Reports.

7. **Choose the Position box Placement** location from the drop-down box.
8. **Choose the Position box Location** information from the drop-down box.
9. **Click UPDATE FPPS POSITION** to update the Reporting Information for the position.

10. **Click on the View this Organization Chart in Current State link** at the top of the page to verity that that the employee/position is now correctly located on the Org Chart.

You have now completed Step 2 of Creating a Single Org Chart. You included/excluded positions from your Org Chart and updated Position Data for the positions on your Org Chart. You can now move to Step 3 of Creating a Single Org Chart.

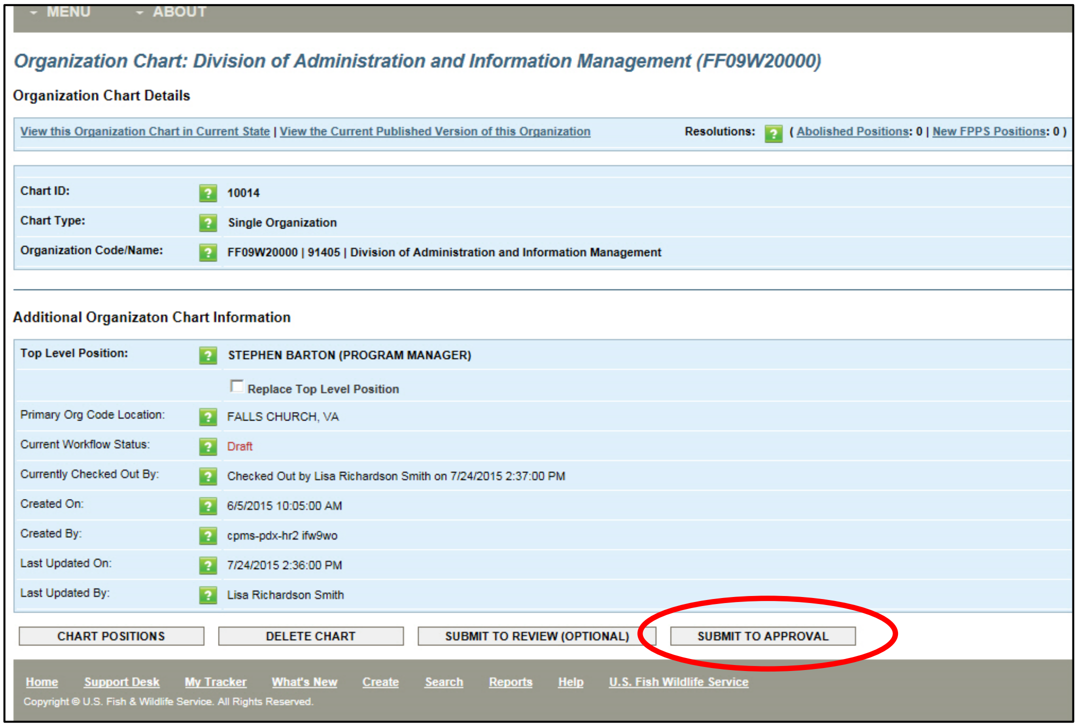
Creating a Single Org Chart – Step 3: Submit Your Org Chart for Approval

When you have made all necessary updates to your Org Chart, and/or verified that the Org Chart is correct and complete, you can finalize and submit for signatures and publishing. You can also optionally submit to HR for review, but that is only when you deem it is necessary prior to publishing. However, note that once in approval, if another user makes changes to another chart (i.e. a Multiple Org Chart for the same organization) that impacts this chart, the system will automatically push your Org Chart back to Draft status, and you will need to review and edit the Org Chart if necessary.

Also, you cannot submit an Org Chart for approval if there are any validation errors in the chart (such as a broken link in a Reports To Structure [e.g. if you deleted or excluded a position to which another position reported in the organization]). If there is a broken hierarchy, or other validation error when you attempt to submit your Org Chart for approval, you will simply not have the SUBMIT TO REVIEW or SUBMIT TO APPROVAL buttons available on your screen. However, once you fix the broken hierarchy, or other validation error, those buttons will appear and will allow you to submit your Org Chart.

To submit your Org Chart for approval from MY TRACKER:

1. **Select your Org Chart from the MY TRACKER list, and choose Continue Edit** from the Action drop-down.
2. **Click Submit to Approval** at the bottom of the screen.
3. A dialogue box will appear asking you to confirm that you wish to submit the Org Chart for approval. **Click OK.**



Your Org Chart is now submitted for approval and ready for your approving official to review and sign. At this point in time you should notify your approving official that this chart is in approval status and ready for their review and signature, if approved. The approving official can return the chart to Draft status if additional edits need to be made before the chart can be signed and published.

You have now completed Step 3 of Creating a Single Org Chart. You submitted your Org Chart for approval. You can now move to Step 4 of Creating a Single Org Chart.

Creating a Single Org Chart – Step 4: Approve and Sign/Publish Your Org Chart

After an Org Chart has been submitted for approval, and approved, if you have permission, you can sign the Org Chart and publish it.

To approve and publish an Org Chart from MY TRACKER

1. **Select your Org Chart from the MY TRACKER list, and choose Edit** from the Action drop-down.
2. **Enter your title if signing as a proxy, and enter the name of individual for whom you are acting as the signature approval for the Org Chart in the Signing As/For box. Or, if you are signing for yourself, go to step 3.**

3. **Enter your active directory password in the Enter Password box.**

4. **Click Sign and Publish** at the bottom of the screen.
5. A dialogue box will appear asking you to confirm that you wish to publish the Org Chart as an official Organization Chart. **Click OK.**

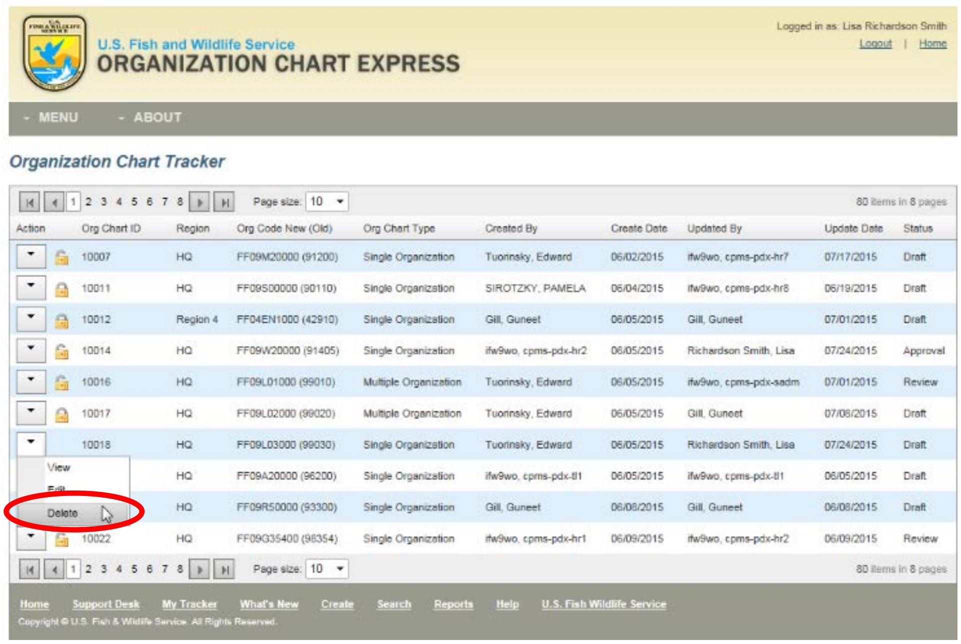
Your Org Chart is now published, and will appear as the Current Published Version of the Org Chart the next time you access the Org Chart in OCX.

Deleting an Org Chart

You cannot delete an Org Chart that is in Approval status or that has been published, but you can delete an in-process Draft or Review Org Chart. To delete an Org Chart from MY TRACKER:

1. **Select your Org Chart from the MY TRACKER list, and choose Delete** from the Action drop-down.
2. A dialogue box will appear asking you to confirm that you wish to delete the Org. **Click OK.**

Your draft Org Chart is now deleted, along with any changes that you made since the Org Chart was last published.

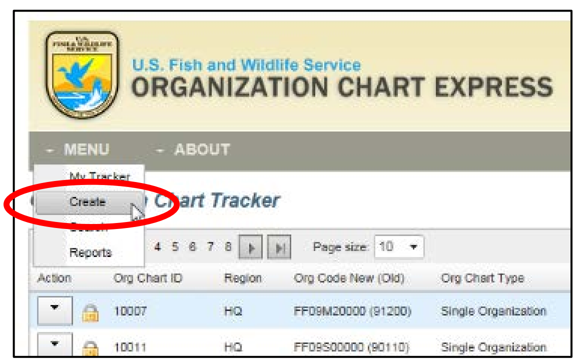


And that is all there is to creating, submitting for approval, approving, publishing and deleting a Single Org Chart.

2. Creating a Multiple Org Chart

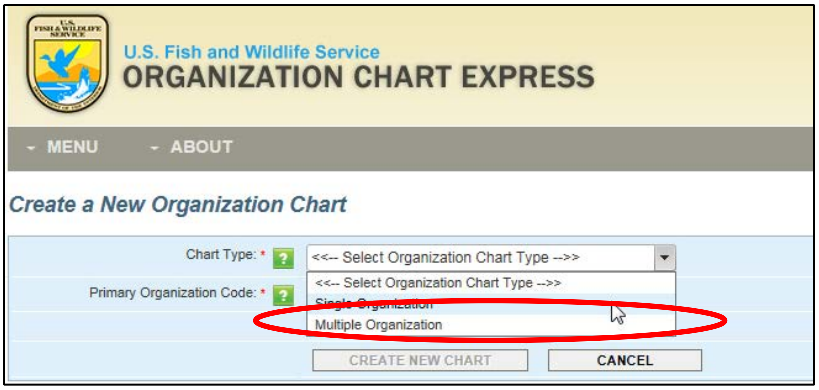
The OCX module allows you to create a Multiple Org Chart from a previously published Org Chart, pulling data from previously published Org Charts and FPPS. However, because the information from FPPS is pulled down directly into OCX, the data exchange between FPPS and OCX is transparent to you. All you will need to know is the Org Codes, and the Chart Type, and OCX will populate the creation screen with applicable ORG Chart.

One important thing to note when creating a Multiple Org Chart: Because multiple Org Codes are used in Multiple Org Charts, it is possible that there are Single Org Charts that belong to some of the lower level positions within a Multiple Org Chart. Therefore, any changes to your Multiple Org Chart with regard to adding new positions, or changing Report To information for any position other than the Top Level position may have impacts on those related Single Org Charts. For instance, if there is an Org Chart where the top level position has 4 direct reports, each of whom have their own Org Codes, it is possible that each of these 4 direct reports have their own Single Org Charts. These Single Org Charts are not displayed in your Multiple Org Chart. But, if you make changes to your Multiple Org Chart – maybe by adding new positions that Report To one of these 4 direct report, or by changing your Org Chart so that one of your direct reports now reports to another of your direct reports instead of to the Top Level position – then you have likely impacted the Single Org Charts of these direct reports. And, once you have finalized and published your Org Chart, the changes that you have made may require those direct reports to modify their Single Org Charts accordingly. Therefore, it is important to understand how changes to Multiple Org Charts can impact related Single Org Charts.



To Create a Multiple Org Chart:

1. Ensure that you are logged into HCMS, and in the OCX module
2. **Click the MENU** item
3. **Select CREATE** from the drop-down list
4. **Choose MULTIPLE** from the Chart Type drop-down list
5. **Choose the Top-Level ORG Code** for your Org Chart from the Primary Organization Code drop-down list.



**You Try It ** EXERCISE

Create a Multiple Org Chart

Upon completion of this exercise, you will have successfully demonstrated the ability to create a Multiple Org Chart in OCX.

YOU TRY IT

5. Click MENU
6. Select CREATE
7. Choose MULTIPLE from the Chart drop-down.
8. Choose your Org Code from the drop-down.

Create a Multiple Org Chart

The Org Chart Manager screen displays summary level details about your Org Chart. Once a Multiple Org Chart is initiated, the next step is to review the high-level Org Chart Details on this screen. The details include any resolutions that must be made such as Validation Errors or Warnings based on data updates from FPPS (including New or Abolished positions); Org Chart information such as the Chart ID, Chart Type, and Org Code/Name; and Additional Org Chart Information such as the Top Level Position in the Org Chart, primary Org Code Location, Workflow Status, and Created/Updated information.

Creating a Multiple Org Chart – Step-by-Step:

1. **Validate the Org Chart Details** on this screen to ensure that the Chart Type and Org Code/Name are correct.
    a. **Review the Current and Last Published Chart** to compare the two.
    b. **Note any Warning Message and Highlights around New or Abolished Positions** which are not currently reflected in the published chart.
    c. **Validate that the Top level Position is correct and update if incorrect.**
2. **Access Chart Positions screen to review Chart Positions information** and ensure that all position data is correct.
    a. **Include (by Org Code)/Exclude positions from the Org Chart.**
    b. **Update Position data** (Reports To, Placement on the Chart, Org position type)
3. **Submit to Approval**
4. **Approve & Sign / Publish Org Chart**

Creating a Multiple Org Chart – Step 1: Validate the Org Chart Details

1a. Review the Current and Last Published Org Chart

It is helpful to compare the last published Org Chart with the current version of you Org Chart. This is because anyone within your organization who has access to edit this chart can change the Org Chart, and it is important to ensure that your Org Chart is correct and valid before submitting it for approval.

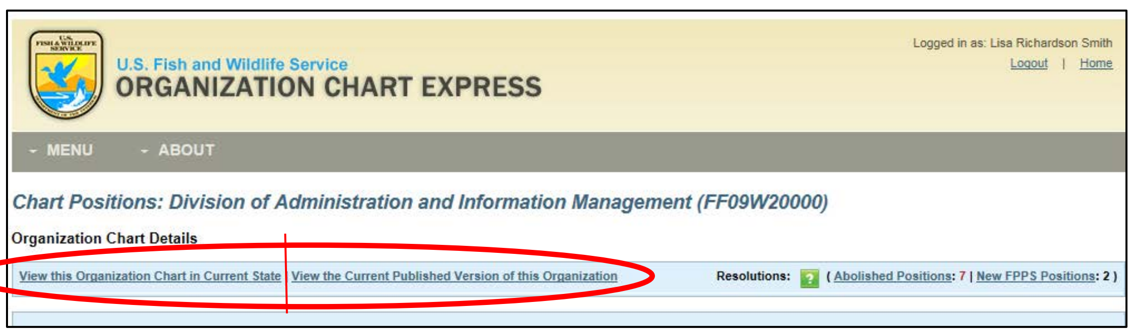
With some Organizations, the Org Charts are quite large, and it might be helpful to print the pdf version of the Current Published Org Chart in order to be able to accurately compare it to the Current Org Chart.

View the Current and Last Published Versions of this Organization

This is the last published version of the Org Chart for your organization. Note that there are two links at the top of each page **View the Current Published Version of this Organization** and **View this Organization Chart in Current State**. The Current Published Version is the last approved and published version of your Org Chart. The Current State is the Org Chart as it looks today – with any abolished positions, any revisions that you have made to the Chart, etc., and may differ greatly from what your last published version looked like. You will want to make sure that you review both versions, to understand any changes since the Org Chart was last published before you send this Org Chart for approval.

1. **Click View the Current Published Version of this Organization** link at the top of the screen. The last published version of the Org Chart will display on screen. For larger organizations, it may be beneficial to export the preview to pdf, and then print it to compare against the current Org Chart.
   1a. Click Export the Preview below to PDF.
   1b. Click Open or Save to either open or save the pdf version of the last published Org Chart. A new window will open with the PDF version of the last published Org Chart shown. From here you can print the PDF using the Adobe Reader controls.
2. **Click View this Organization Chart in Current State** link at the top of the screen. The current (draft) version of the Org Chart will display on screen. Again, for larger organizations, it might be beneficial to export the preview to pdf, and then print it to compare against the current Org Chart.
3. **Compare the last Published Version of the Org Chart to the Current (draft) Org Chart**.

It is important that your current Org Chart reflect all of the reporting positions within your organization and that the reporting hierarchy is correct. Your previously Published Org Chart and your new Draft Org Chart will not always look identical. Instead, new hires, abolished positions, and changes in reporting structures should be reflected in your new Org Chart. If you need to change any of the information in your new (draft) Org Chart, here is how to do so:



1b. Note any Warning Messages and Notes around New/Abolished Positions

ON TRACK….

It's important to note that all abolished position data comes directly from FPPS. You may need to make updates to your Org Chart to ensure that personnel that were assigned to an abolished position have been reassigned accordingly. You should also check to see if there are any new FPPS positions on your Org Chart, because often the staff associated with an abolished position is associated with a new position in your chart (i.e. removal of an old position and creation of a new position to replace it).

HELP

You cannot delete a position unless it is already abolished, or if it is a Workforce Planning (WFP) position. WFP will be covered in Module 3 Section 3.

Validation Errors and Warnings provide insight into any positions that have been removed (abolished) from the Org Code as well as new positions that have recently been added to the Organization in FPPS and are considered abolished or added in OCX. If a position was abolished, and you have questions about this, contact your servicing HR Representative. Validation Errors and Warnings will also provide information on all new named positions (encumbered positions) from FPPS that do not currently exist in the Org Chart and need to be added into the Org Chart to display. Abolished Positions that need to be removed, and New FPPS positions that need to be added to your Org Chart are shown in links at the top right of the window. See Step 2a for instructions on how to add new FPPS positions.

Correcting Abolished Positions

Abolished Positions are those positions that were removed from the org Code in FPPS (due to promotions, moves to other organizations, retirements, etc.) Updates on any recently abolished positions are displayed in the upper right corner of the Org Chart Manager screen. Abolished positions will not be automatically removed from your Org Chart. Instead, you will need to acknowledge the removal by selecting the Delete icon next to each of the positions to ensure that a manger is aware that the position was abolished. The system will provide you with a confirmation that will require you to confirm the removal of this position, because once an abolished position is removed, it cannot be added back to the Org Chart. You may also exclude an abolished position from your Org Chart, instead of deleting it. Excluding a position does not delete it from the Org Chart data, but instead simply excludes it from being shown on the Chart once it is created. See step 2a for instructions on adding new FPPS positions into your Org Chart.

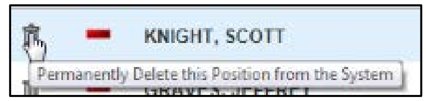
It's important to remember that all abolished position data comes directly from FPPS, you may need to make updates to your Org Chart to ensure that personnel that were assigned to an abolished position have been reassigned accordingly. As an aside, you should also check to see if there are any new FPPS positions on your Org Chart, because often the staff associated with an abolished position is associated with a new position in your chart (i.e. removal of an old position and creation of a new position to replace it)

To Resolve Abolished Positions:

1. **Click the Abolished Positions** link to the right of **Resolutions** in the

header. This will populate the screen with any positions that have been abolished from your Org Chart data.

2a. Click **the Delete Icon** to the left of the Position Title. This will delete the position from your Org Chart and from the underlying data. Note that if you cannot delete the position from your Org Chart, it means that there are valid personnel reporting to the abolished position, and that those personnel must be reassigned before you can delete the abolished position from the Org Chart.



2b. **Click the Exclude Icon** to the right of the Delete Icon. This will maintain the position data in your Org Chart data, but will exclude it from appearing on your published Org Chart. Note that if you cannot exclude the position from your Org Chart, it means that there are valid personnel reporting to the abolished position, and that those personnel must be reassigned before you can exclude the abolished position from the Org Chart. Once an abolished position is excluded it can no longer be included back on the Org Chart, so typically deletion is the best way to remove these positions.

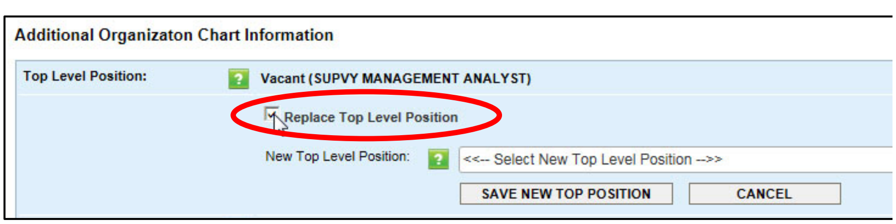
3. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

1c. Validate that the Top Level Position information is correct and update it if necessary

The Root Node or Top Level position of the Org Chart is the highest level position within the Org Chart. This is the position to which all positions within the Org Chart report, through the chain of command. If necessary, you can change the Top Level Position from the Org Chart Manager Screen.

To Update the Top Level Position

1. **Click the Replace Top Level Position check box** in the Additional Organization Chart Information area.
2. A new field will appear. **Choose the new Top Level position from the New Top level Position drop-down**.
3. **Click SAVE NEW TOP POSITION**.
4. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.



ON TRACK….

Note that changing the Top Level Position within the Org Chart will automatically reassign all subordinate positions to the newly assigned top level position. You will need to revisit the Reports To information for all subordinate/child positions to validate that the appropriate changes have been made to accurately reflect the current organization

You have now completed Step 1 of Creating a Multiple Org Chart. You validated the Org Chart details screen to ensure that the Chart Type and Org Code/Name were correct, reviewed the Current and Last Published Org Charts to compare the two, corrected any abolished positions, and validated/replaced the Top Level position within your Organization. You can now move to Step 2 of Creating a Multiple Org Chart.

Creating a Multiple Org Chart – Step 2: Chart Position Information

HELP

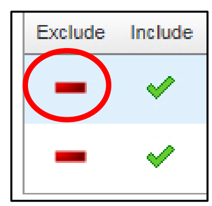
It's important to note that you cannot exclude a position from the Org Chart if they have any reports/subordinates on the Org Chart (in other words, a position cannot be excluded from the Org Chart, if another position reports to that position). If the position has reports/subordinates, the Exclude column will display "N/A" until you have reassigned all subordinates.

The Chart Positions Screen shows all Associated Organization Chart Positions that appear on your Org Chart. This includes the ability to include or exclude positions from appearing on the Org Chart, the ability to add Direct Reports to the position (via the Associate Staff link), the Employee Name and OPM Position title for the position, the Pay Plan/Grade and Series for the position, how many direct reports the position has (in the Child Count column) and whether the position is in the Org Chart hierarchy either as a child (subordinate), or as a parent (supervisor).

2a. Include/Exclude Positions from the org Chart

To Exclude a Position from the Org Chart:

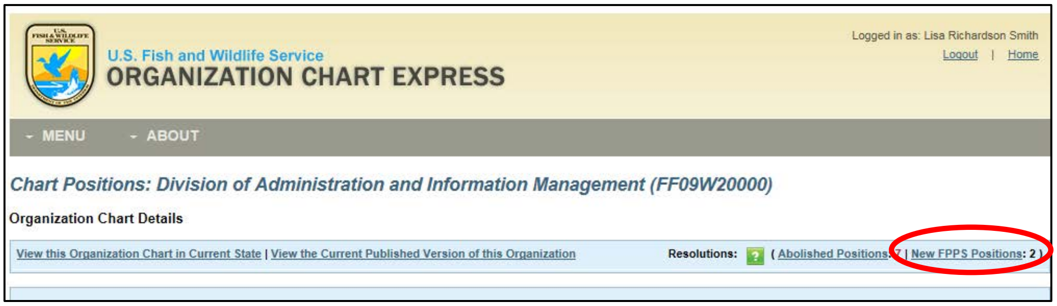
1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Positions Screen. You will see a listing of all positions on the Org Chart.
2. To exclude a position from the Org Chart, **click the red line in the Exclude column**.
3. A dialogue box will appear asking you to confirm the exclusion. **Click OK** to exclude the position from the current Org Chart.
4. The Position will remain in your organization but will no longer be displayed on the Chart Positions screen (which displays positions on the Org Chart) or on the current Org Chart. To add this position back you will need to click the "✓" sign to re-associate this position with their supervisor and they will re-display on the chart and chart position screen.
5. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the exclusion of the position from the Org Chart.



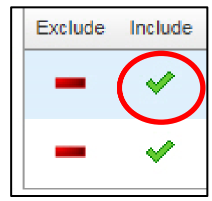
To incorporate new FPPS Positions into the Org Chart:

The New FPPS section contains all new named/encumbered positions that were added to FPPS but do not yet exist in the Org Chart. You will need to add these positions in, and complete their reporting structure in the Org Chart to ensure proper placement.

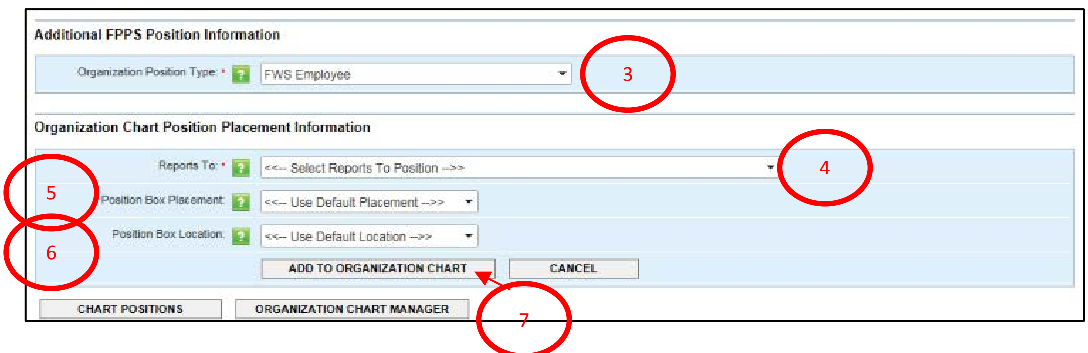
1. **Click the New FPPS Positions** link to the right of **Resolutions** in the header. This will populate the screen with any positions that have been added via FPPS to your Org Chart data.



2. **Click the INCLUDE icon** to include the position so that it appears in your Org Chart.



If you choose to include the position in your Org Chart, the FPPS Position Information screen will appear, and you will have to complete the position information for your Org Chart.



3. **Choose the Organization Position Type** from the drop-down to choose the position type for the employee.
4. **Select the Reports To** information from the drop-down box to indicate who the new employee will report to within the Org Chart structure.
5. **Choose the Position box Placement** location from the drop-down box.
6. **Choose the Position box Location** information from the drop-down box.
7. **Click ADD TO ORGANIZATION CHART** to add the new position to your Org Chart.
8. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

ON TRACK….

Note that if you have multiple new FPPS positions that will all report to the same higher level position, you do not have to assign the Reports To information for each individually. Instead, you can use the Bulk Update once all new FPPS positions are added to the Org Chart.

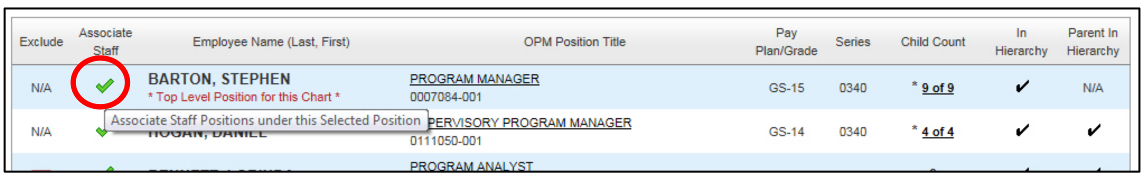
2b. Update Position Data

Position Data includes information such as the Reports To information, Organization Position Type (i.e., Branch Chief), and placement in the Org

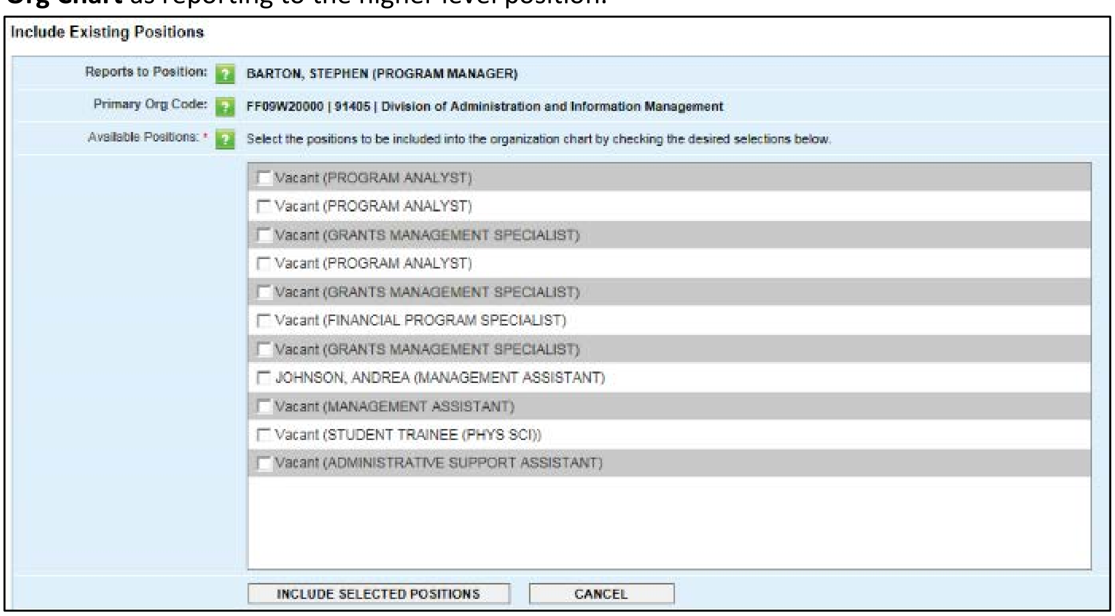
Chart for each position. The Reports To information provides details on the chain of command by indicating the position to which any other position reports. The Organization position Type identifies the position type associated to the position (such as Assistant Director, Regional Director, etc.). The Placement on the Org Chart allows you to change the positon box placement (where the position will appear in relation to its Reports To position), and the position box location (whether you want the position to display on the right or left of the Reports To position.) Unlike with Single Org Code Charts though, where the only positons that can be associated are those within the single Org Code, Multiple Org Code Charts can have associated staff from the any of the child org codes.

Bulk Updates to Revise the Reports/Subordinates to a Position:

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position to which you wish to add reports/subordinates (note the number of reports/subordinates that the position currently has in the Child Count column).
3. To change the reporting structure for a position (we will call this the higher level position), **click on the Associate Staff icon** for the position.



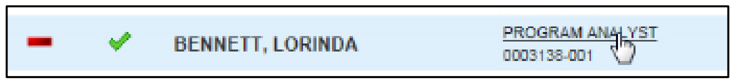
4. The Organization Chart Details screen will refresh to show the positions that can be included into the organization, and report to the higher level position.
5. First **choose the Child Org Code from the Child Org Codes** drop-down for the positions that you wish to associate. NOTE that this is different than in a Single Org Code chart.
6. **Then, click on the box next to each position in that Org Code that should be shown in the Org Chart** as reporting to the higher level position.



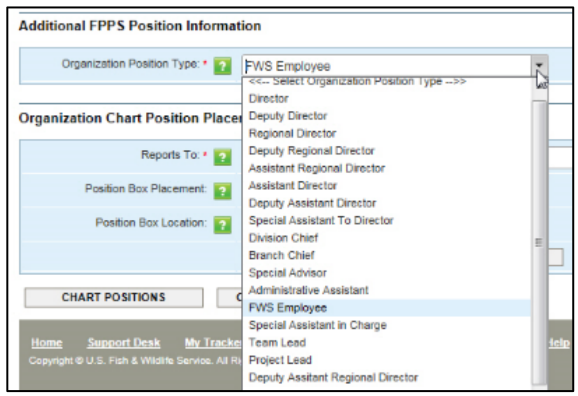
7. **Click the INCLUDE SELECTED POSITIONS** button.
8. **Repeat Steps 5, 6, and 7** for each Org Code that needs to have staff associated**.**
9. Verify that the reports/subordinates that you selected on the previous screen have been added to the Child Count for the higher level position on this screen.
10. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

To Revise the Organization Position Type for a Position

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position for which you wish to change the Position Type.
3. To change the Organization Position Type for a position, **click on the OPM Title** for the position.



4. The Organization Chart Details screen will refresh to show the FPPS position information for the position.
5. **Scroll down to the Organization Position Type Information**.
6. **Click the Organization Position Type** drop-down box and choose the correct Organization Position Type information for the position.



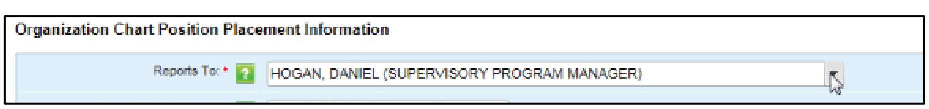
7. **Click UPDATE FPPS POSITION** to update the Organization Position Type for the position.
8. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

ON TRACK….

Changing the Organization Position Type for a position may require you to change the placement of the position within the Org Chart. Also, changes to the Reports to of a position on a Single Org Chart may have impacts on other in-process charts (i.e., a multiple chart for that same organization).

Individual Updates to Revise the Reports To for a Position

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position for which you wish to change the Reports To.
3. To change the Reports To for a position, **click on the OPM Title** for the position.
4. The Organization Chart Details screen will refresh to show the FPPS position information for the position.
5. **Scroll down to the Organization Chart Position Placement Information**.
6. **Click the Reports To**

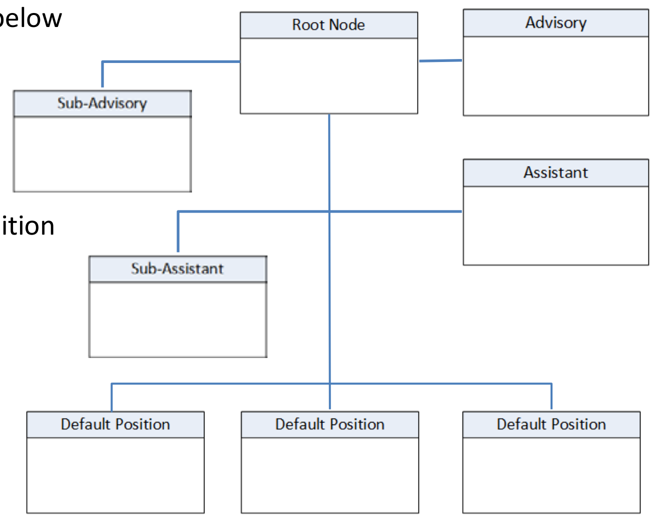


drop-down box and choose the correct Reports To information for the position.

7. **Click UPDATE FPPS POSITION** to update the Reports To Information for the position.
8. **Click on the View this Organization Chart in Current State link** at the top of the page to verity that that the employee/position is now listed as a direct report.
9. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the changes to the Org Chart.

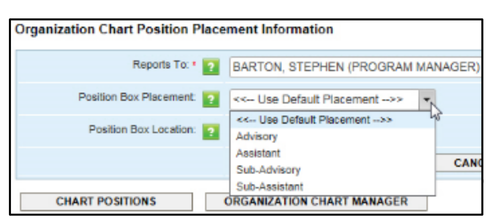
To Change a Position's Placement on the Org Chart

Position Placement is the placement of the position on the Org Chart, relative to the position to which it reports. The potential positions in which a position can be placed include:



- **Regular/Default Position** – which is directly below the position to which it reports, and shows a direct chain of command.
- **Advisory** – which is linked directly to the Right or Left of the position to which it reports, showing an advisory status. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions.
- **Sub-Advisory** – which is below the position to which it reports, but linked from the left or right of the higher level position. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions.
- **Assistant** – which is below and to the left or right the position to which it reports, but linked from the bottom center of the higher level position. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions (e.g. this position serves and reports to its higher level position only.)
- **Sub-Assistant** – which is directly below the position to which it reports. This position is not in the chain of command that Regular positions are placed in, because it has no supervisory status over Regular positions.

1. **Click Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position for which you wish to change the placement.
3. To change the Reports To for a position, **click on the OPM Title** for the position.
4. The Organization Chart Details screen will refresh to show the FPPS position information for the position.
5. **Scroll down to the Organization Chart Position Placement Information**.



6. **Click the Position Box Placement** drop-down box and choose the correct position box placement within the Org Chart for the position. Note that these placements refer to the location that the box will appear in relation to the position to which it Reports.
7. **Choose the Position box Placement** location from the drop-down box.
8. **Choose the Position box Location** information from the drop-down box.
9. **Click UPDATE FPPS POSITION** to update the Reporting Information for the position.

10. **Click on the View this Organization Chart in Current State link** at the top of the page to verity that that the employee/position is now correctly located on the Org Chart.

You have now completed Step 2 of Creating a Multiple Org Chart. You included/excluded positions from your Org Chart and updated Position Data for the positions on your Org Chart. You can now move to Step 3 of Creating a Multiple Org Chart.

Creating a Multiple Org Chart – Step 3: Submit Your Org Chart for Approval

When you have made all necessary corrections to your Multiple Org Chart, and/or verified that the Org Chart is correct and complete, you can finalize and submit for signatures and publishing. You can also optionally submit to HR for review, but that is only when you deem it is necessary prior to publishing. If you have had made any changes to your Multiple Org Chart that impacts other Org Charts, you will not be able to submit the Org Chart for approval, and instead the system will simply push the Org Chart back to Draft status, and you will need to edit your Multiple Org Chart to fix the validation errors. Also, note that once the Org Chart is in approval, if another user makes changes to another chart (i.e. a Single Org Chart for one of the Org Codes that is covered in your Multiple Org Chat) that impacts this chart, the system will automatically push your Org Chart back to draft status, and you will need to review an edit the Org Chart if necessary.

HELP

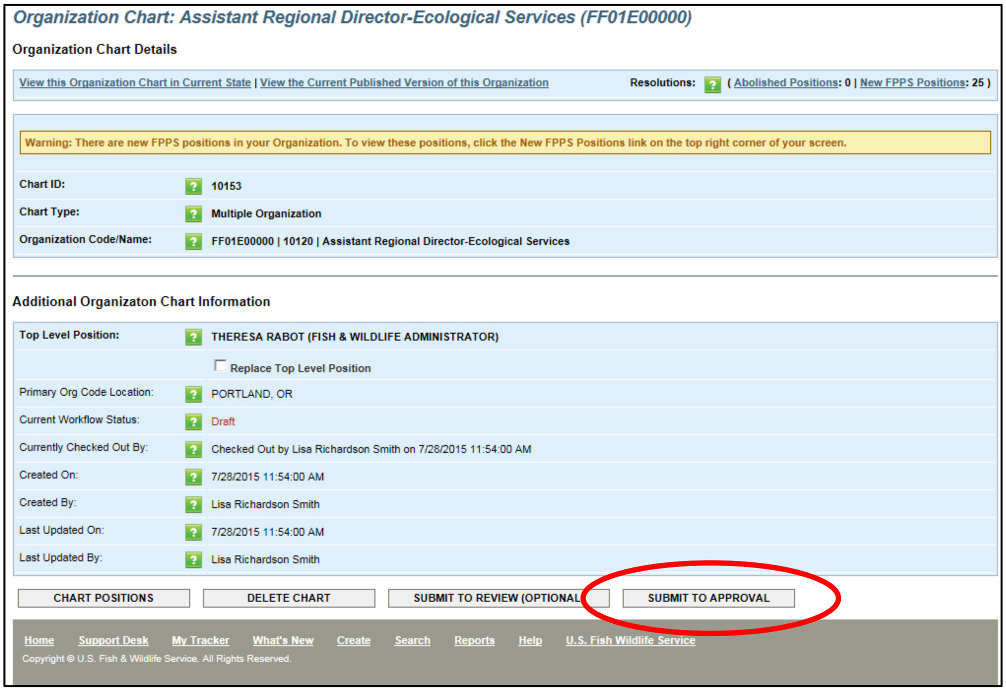
You cannot submit an Org Chart for approval if there are any validation errors in the chart (e.g. if you deleted or excluded a position to which another position reported in the organization). If there is a broken hierarchy, or other validation error when you attempt to submit your Org Chart for approval, you will simply not have the SUBMIT TO REVIEW or SUBMIT TO APPROVAL buttons available on your screen. However, once you fix the broken hierarchy, or other validation error, those buttons will appear and will allow you to submit your Org Chart.

To submit your Org Chart for approval from MY TRACKER:

1. **Select your Org Chart from the MY TRACKER list, and choose Continue Edit** from the Action drop-down.
2. **Click Submit to Approval** at the bottom of the screen.
3. A dialogue box will appear asking you to confirm that you wish to submit the Org Chart for approval. **Click OK.**

Your Org Chart is now submitted for approval and ready for your approving official to review and sign. At this point in time you should notify your approving official that this chart is in approval status and ready for their review and signature, if approved. The approving official can return the chart to Draft status if additional edits need to be made before the chart can be signed and published.

You have now completed Step 3 of Creating a Multiple Org Chart. You submitted your Org Chart for approval. You can now move to Step 4 of Creating a Multiple Org Chart.



Creating a Multiple Org Chart – Step 4: Approve and Sign/Publish Your Org Chart

After an Org Chart has been submitted for approval, and approved, if you have permission, you can sign the Org Chart and publish it.

To approve and publish an Org Chart from MY TRACKER

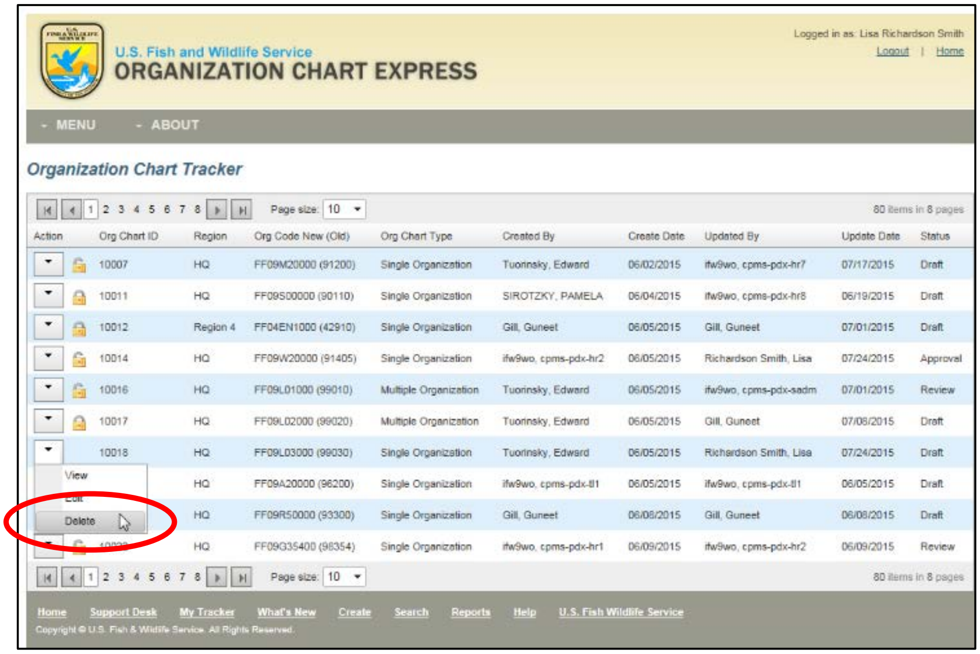
1. **Select your Org Chart from the MY TRACKER list, and choose Edit** from the Action drop-down.
2. **Enter your title if signing as a proxy, and enter the name of individual for whom you are acting as the signature approval for the Org Chart in the Signing As/For box. Or, if you are signing for yourself, go to step 3.**

3. **Enter your active directory password in the Enter Password box.**
4. **Click Sign and Publish** at the bottom of the screen.
5. A dialogue box will appear asking you to confirm that you wish to publish the Org Chart as an official Organization Chart. **Click OK.**

Your Org Chart is now published, and will appear as the Current Published Version of the Org Chart the next time you access the Org Chart in OCX.

Deleting an Org Chart

You cannot delete an Org Chart that is in Approval status or that has been published, but you can delete an in-process Draft or Review Org Chart. To delete an Org Chart from MY TRACKER:



1. **Select your Org Chart from the MY TRACKER list, and choose Delete** from the Action drop-down.
2. A dialogue box will appear asking you to confirm that you wish to delete the Org. **Click OK.**

Your draft Org Chart is now deleted, along with any changes that you made since the Org Chart was last published.

And that is all there is to creating, submitting for approval, approving, publishing and deleting a Multiple Org Chart.

3. Workforce Planning

The OCX module allows you to create Workforce Planning (WFP) Positions – or positions for which you plan to fund, recruit for, and hire for in the future (not currently available in FPPS) – and add these to your Org Chart to indicate vacant positions that are to be filled. You can even tentatively name a current employee to these WFP positions, although note that these positions only appear in the OCX module, not in FPPS as actual positions until HR has authorization to make these updates, and not in PD Express or JAX as positions to be filled until the Org Chart is approved and a hiring action is initiated in PD Express.

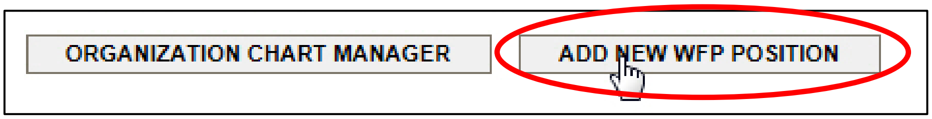
To add a WFP position to your Org Chart

1. Ensure that you are logged into HCMS, and in the OCX module
2. **Click the MENU** item
3. **Click MY TRACKER**
4. **Choose your ORG Chart** from the MY TRACKER List

5a**. Choose EDIT** (if the Org Chart is not in Draft format) from the Action drop-down list or

5b. **Choose CONTINUE EDIT** (if the Org Chart is in Draft format) **from** the Action drop-down list

6. **Click CHART POSITIONS** from the bottom of the screen
7. **Click ADD NEW WFP POSITION** from the bottom of the screen



The screen will refresh and there will be areas where you can fill in the New WFP Position Information and Organization Chart Position Placement Information for the new WFP Position. Here are the steps to add the information or the WFP position:

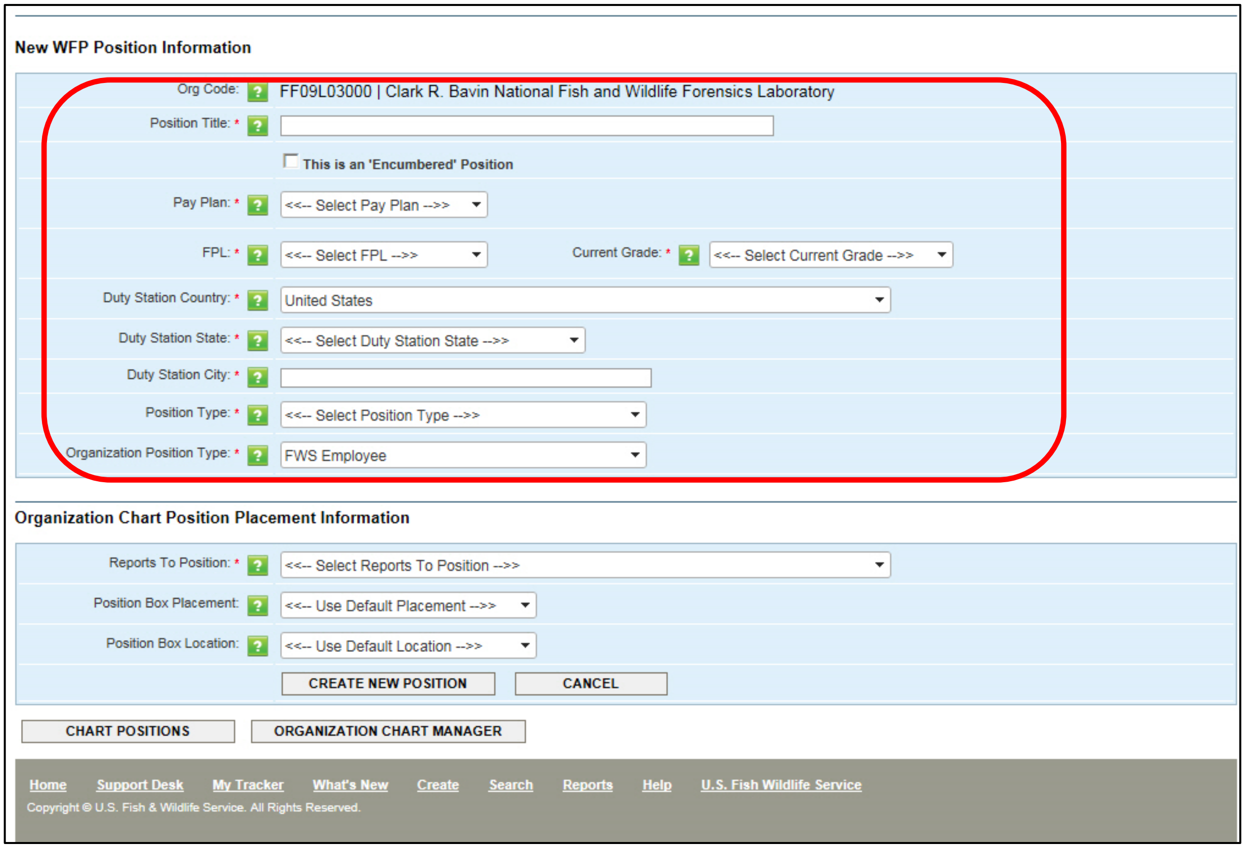
1. **Type in the OPM Position Title** in the provided box

   2a. If this is an encumbered position, **click the This is an 'Encumbered" Position check box. Then Add the First, Middle (if known), and Last Name of the employee who will fill the WFP position once it is approved and funded.**

   2b. If this is not an encumbered position, **go to step 3**.
3. **Select the Pay Plan** associated with the WFP position from the Pay Plan drop-down box

   3a. Select **the Series** associated with the WFP Position, if applicable
4. **Select the Highest Level to which the WFP position may be promoted** through successive competitive career promotions **from the FPL** drop-down box

5. **Select the Current Proposed Grade from the Current Grade** drop-down box

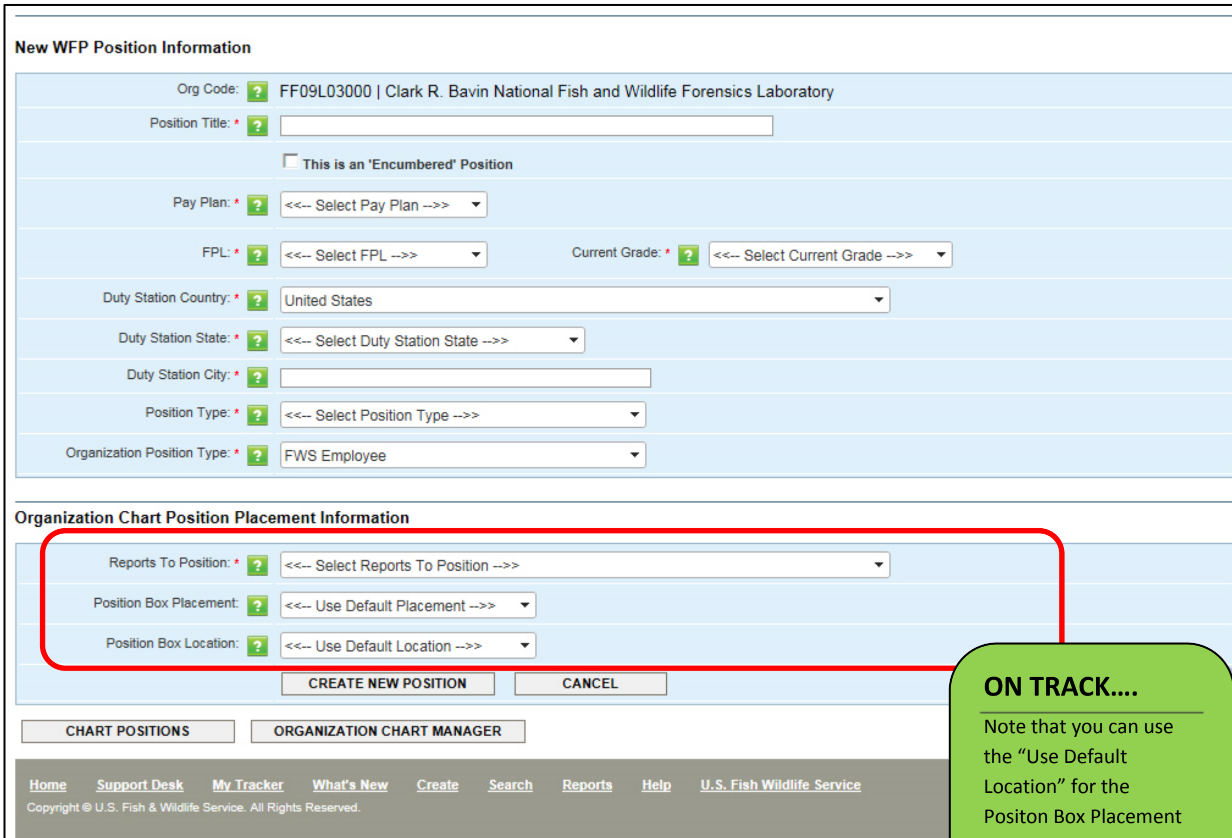


6. **Select the Country where the WFP position will be working** from the Duty Station Country drop-down box
7. **Select the State where the WFP position will be working** from the Duty Station State drop-down box
8. **Type in the City where the WFP position will be working**
9. **Select the position type** (supervisory or non-supervisory) from the Position Type drop-down box
10. **Choose the Organization Type associated with the WFP position** from the Organization Position Type drop-down box

Once you have specified the required fields for New WFP Position information, you must determine the position's placement on the Org Chart. You can decide who the new WFP position will report to, and how that position will be shown on the Org Chart.

1. **Select the position to whom the new WFP Position will report** from the Reports To Position drop-down box
2. **Select where in the Org Chart you want the position to appear** using the Position Box Placement drop-down box (See Position Placement Definition in Section 2b for Creating either Single or Multiple Org Charts).

3. **Select whether you want the WFP position to display on the left or the right** from the Position Box Location drop-down



ON TRACK….

Note that you can use the "Use Default Location" for the Positon Box Placement and Position Box Location in lieu of choosing the location.

4. **Click CREATE NEW POSITION** to add the WFP position to your Org Chart.

The Organization Chart Details screen will appear, with your new WFP position listed at the bottom of the positions. Review the information to ensure that the Employee Name (if an encumbered position, otherwise the name will display as Proposed Vacancy, OPM Position Title, Pay Plan/Grade, and Series are correct. You can also click the **View This Organization Chart In Current State** link at the top of the screen to see how your WFP Position is charted in the organization. In doing so, you will notice that the Top Level Position is shown in black, all other filled positions are shown in blue, and your WFP Position is shown in red. This is to provide a distinction between FPPS positions and WFP positions once the Chart is approved and submitted.

To Edit a WFP Position in your Org Chart

If you need to delete a WFP position, you can do so from the Organization Chart Details Screen. However, note that WFP Positions that do not have any positions that list the WFP Position as the "Reports To". Follow these steps:

1. **Click the OPM Position Title of the WFP Planning Position that you wish to delete** to return to the WFP Position information screen
2. **Click the DELETE POSITION button** at the bottom of the screen
3. A dialogue box will appear asking you to confirm that you wish to delete the WFP Position and revert all linked organization charts to the Draft Phase. **Click OK**
4. The Organization Chart Details screen will appear. From here you can continue to work with your Org Chart, or you can resubmit the Org Chart for Review or Approval.

And that is all there is to Workforce Planning positions in your Org Chart.

4. Creating an Entirely New Org Chart

The OCX module allows you to create new Org Charts that are not based upon previously published Org Charts. This is helpful when changes in an organization create new Org Codes, for which Org Charts must be created, or when a new program is created for which Org Charts have not been developed. If the Org code does not exist, or you do not have access to it, you will need to contact your HR Representative, to determine how and if you can get access to the Org Code.

HELP

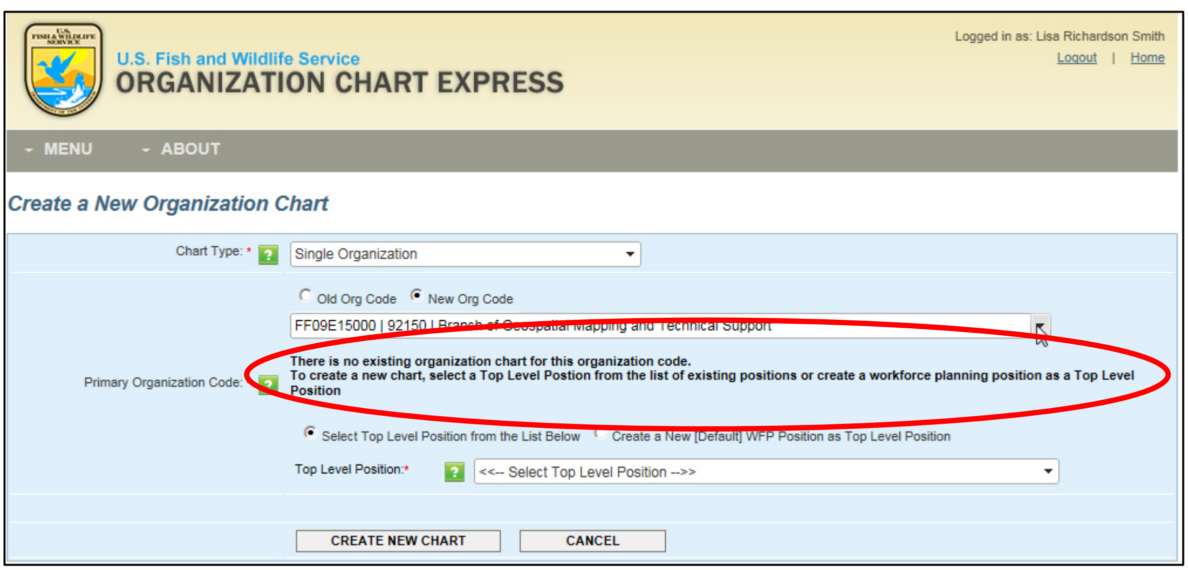
Note that when creating an entirely new Org Chart, the only Org Codes that will be accessible and displayed will be those for which you have access.

To Create an Entirely New Org Chart

1. Ensure that you are logged into HCMS, and in the OCX module
2. **Click the MENU** item
3. **Select CREATE** from the drop-down list
4. **Choose SINGLE or MULTIPLE** from the Chart Type drop-down list
5. **Choose the ORG Code** for your Org Chart from the Primary Organization Code drop-down list

No In Process-Chart/No Published Chart Message

If there is no current in-process Org Chart, or no previously Published Org Chart for the Org Code that you chose, you will receive a dialogue box that indicates "There is no existing Organization Chart of this type for this Organization Code." In order to continue creating your entirely new Org Chart, you will have to begin from the top, by setting up the Top Level Position, or root node, and then continuing from there.



Set Up the Top Level Position

The Top Level Position, or root node, is the position that is at the top of the reporting hierarchy for the Organization Code. You will need to set up the Top level Position before you can continue creating your Entirely New Org Chart. To do so, you can choose to set up the Top Level Position using either a known position in FPPS that has been associated to that Org Code by HR (either using the name of an individual to set up an encumbered position, or using an existing Vacant position), or by setting up an entirely new Workforce Planning (WFP) position for the new Top Level Position in your new Org Chart.

Note that the Top Level Positions dropdown will list all of the positions (encumbered/vacant), excluding abolished positions, that are in the new Org Chart's primary Org Code.

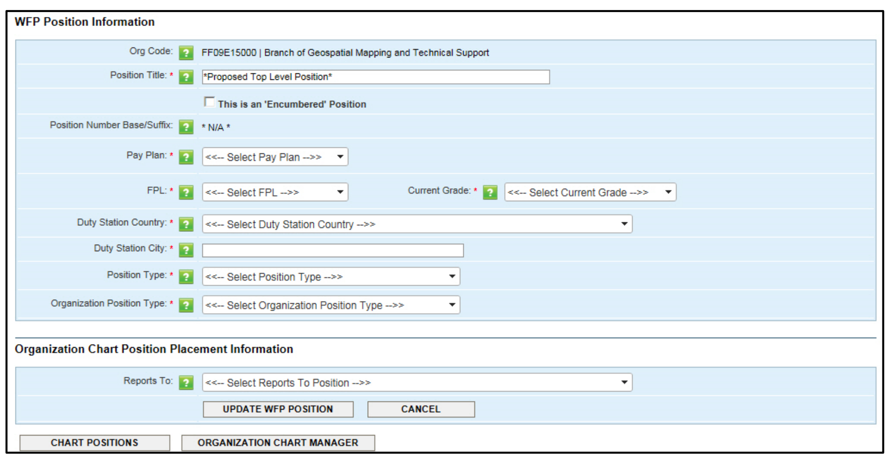
Set up the Top Level Position using a known position

1. **Choose the correct Top Level Position from the Top Level Position drop-down** box.
2. **Click SUBMIT** to create your Entirely New Org Chart, with the assigned Top Level Position.

Set up the Top Level Position using a Workforce Planning (WFP) position

1. **Choose Workforce Planning Position from the Top Level Position drop-down** box.
2. **Click SUBMIT**

You will be directed to the Workforce Planning Information Screen.



3. **Type in the OPM Position Title** in the provided box
   4a. If this is an encumbered position, **click the This is an 'Encumbered' Position check box. Then Add the First, Middle (if known), and Last Name of the employee who will fill the WFP position once it is approved and funded.**
   4b. If this is not an encumbered position, **go to step 6**.
5. **Select the Pay Plan** associated with the WFP position from the Pay Plan drop-down box
6. Select **the Series** associated with the WFP Position, if applicable

7. **Select the Highest Level to which the WFP position may be promoted** through successive competitive career promotions **from the FPL** drop-down box
8. **Select the Current Proposed Grade from the Current Grade** drop-down box
9. **Select the Country where the WFP position will be working** from the Duty Station Country drop-down box
10. **Select the State where the WFP position will be working** from the Duty Station State drop-down box
11. **Type in the City where the WFP position will be working**
12. **Select the position type** (supervisory or non-supervisory) from the Position Type drop-down box
13. **Choose the Organization Type associated with the WFP position** from the Organization Position Type drop-down box
14. **Click UPDATE WFP POSITION** to acknowledge the position, and create your Entirely New Org Chart, with the WFP position as the Top Level Position.

Add Subordinate Positions and Reports To Information

Once your new Org Chart is created with the Top Level Position assigned, you can add any FPPS positions that are assigned to the Org Code, or create new WFP Positions and add these to your Org Chart. The New FPPS section contains all new named/encumbered positions that were added to FPPS but do not yet exist in the Org Chart. There are two ways to add these positions – one is by clicking into each FPPS position, and setting their Reports To information. The second way to add new FPPS positions is to bulk assign those who will report to a single existing position. For instance, if you have created your Org Chart with your Top Level Position, and you have 4 new FPPS positions that will all report directly to the Top Level Position, you should bulk assign them in lieu of clicking into each FPPS position.

To bulk assign positions:

You will need to add these positions in, and complete their reporting structure in the Org Chart to ensure proper placement.

1. **Click the Chart Positions** at the bottom of the page to return to the Organizational Chart Details page. You will see a listing of all positions on the Org Chart.
2. Find the position to which you wish to add reports/subordinates (note the number of reports/subordinates that the position currently has in the Child Count column).
3. **Click the ASSOCIATE STAFF** icon next to the position to whom the new FPPS positions will report.
4. The Organization Chart Details screen will refresh to show the positions that can be included into the organization, and report to the higher level position.
5. **Click on the box next to each position that should be shown in the Org Chart** as reporting to the higher position.
6. **Click the INCLUDE SELECTED POSITIONS** button.
7. **Repeat steps 2-6 above** to associate staff to each current Org Chart position that should have direct reports.

8. From the Chart Positions screen, verify that the reports/subordinates that you have selected on the previous screen have been added to the Child Count for the higher level position on this screen.
9. **Click the VIEW THIS ORGANIZATION CHART IN CURRENT STATE** link at the top, to view the Org Chart that you have created.

Add WFP Positions into your Org Chart

Once your new Org Chart is created with the Top Level Position assigned, you can add any new WFP Positions to your Org Chart. We will not cover adding WFP positions, since that is covered in the previous section. Once these WFP positions are created and added to the chart, you can follow the steps above to associate them to the appropriate supervisor.

HELP

You cannot submit an Org Chart for approval if there are any validation errors in the chart (e.g. if you deleted or excluded a position to which another position reported in the organization). If there is a broken hierarchy, or other validation error when you attempt to submit your Org Chart for approval, you will simply not have the SUBMIT TO REVIEW or SUBMIT TO APPROVAL buttons available on your screen. However, once you fix the broken hierarchy, or other validation error, those buttons will appear and will allow you to submit your Org Chart.

To submit your Org Chart for approval from MY TRACKER

1. **Select your Org Chart from the MY TRACKER list, and choose Continue Edit** from the Action drop-down.
2. **Click Submit to Approval** at the bottom of the screen.
3. A dialogue box will appear asking you to confirm that you wish to submit the Org Chart for approval. **Click OK.**

Your Org Chart is now submitted for approval and ready for your approving official to review and sign. At this point in time you should notify your approving official that this chart is in approval status and ready for their review and signature, if approved. The approving official can return the chart to Draft status if additional edits need to be made before the chart can be signed and published.

5. Exporting and Printing Your Org Chart

To view a larger version of your Org Chart, it might be easier to export the Org Chart PDF so that the data is more easily readable on a single screen. There are also instances where you may wish to export the data from your Org Chart and pull it into Excel. Finally, a printed copy of the Org Chart may come in handy when you are comparing the current state of your draft Org Chart to the last published version of the Org Chart.

To Export the Org Chart to Excel

1. **Choose SEARCH from the top level OCX MENU**.
2. **Search for your ORG Chart** using either the Search by Chart ID or Advanced Search Options
3. Once your chart appears in the search results at the bottom, **Choose the Export to Excel option in the Document drop-down to the right of your Org Chart.**
4. A dialgoue box will appear asking if you wish to Open or Save the Org Chart. **Choose either OPEN or SAVE.**
5. A new window will open with the Org Chart data in an Excel spreadsheet.

Note: There are two Excel extracts from this system. Exporting to Excel from Search allows you to view all of the INCLUDED positions on the Organization Chart you selected in Excel. Extracting a custom report from the Reports drop-down allows you to view all positions in your Organization Code (regardless of whether they are included on your Organization Chart or not) and select the information you wish to display for each of these positions.

Printing Your Org Chart

1. **Choose SEARCH from the top level OCX MENU**.
2. **Search for your ORG Chart** using either the Search by Chart ID or Advanced Search Options
3. Once your chart appears in the search results at the bottom, **Choose the Print PDF option in the Document drop-down to the right of your Org Chart.**
4. A new window will open with the Org Chart data. **Click the Export the Preview below to PDF link** in the upper right corner.
5. A dialgoue box will appear asking if you wish to Open or Save the Org Chart. **Choose either OPEN or SAVE.**
6. A new window will open with the Org Chart data in PDF format.
7. From here you can use the Adbobe Reader controls to print the Org Chart.

You can print on any size paper that you choose. However, for the annual Org Chart Collection, your Org Chart must be printed on standard 8.5X11 inch paper.

MODULE 4: HR FUNCTIONS IN OCX (HR/ADMIN)

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Module 4: HR Functions in OCX (HR/ADMIN)

As an HR Professional, a portion of your time in OCX will be spent reviewing the Org Charts that are submitted to you for optional review, to ensure that they align with HR regulations and with the information required for the given positions. To do so, you will login to HCMS, and chose the Org Charts in the OCX MY TRACKER that have been assigned for your review. A few things to note when reviewing packages submitted for review by HMs:

1. **It is important that you review EACH screen and all content** that the Developer/HM has populated in the Org Chart. Specifically, you must pay close attention to the comparison of the last published Org Chart and the current state of the Org Chart to verify that any differences between the two are valid.
2. **During REVIEW, you can edit the entire Org Chart**. So be certain that any changes that you make are necessary, and that changes do not impact any other Org Charts.
3. **Once you have finished your review, you can Revert to Draft or Submit for Approval.** If you make changes to the Org Chart, you should likely Revert to Draft so that the Developer/HM can review the changes prior to submitting for Approval. If, however, you are the Developer, then you can submit for Approval after revisions.

One thing to note is the processes and uses for Organization Charts will not change as a result of the new automated OCX system. Instead, the tool is meant to standardize the format (look and feel) of the Org Charts and to simplify the creation process.

- The annual process for Org Chart collection will remain the same:
- October 1st: Managers are required to go into each Org Chart to certify (review and sign) them.
- November 1st: Regional HR collects each of the certified Org Charts from their Region to send to HQ.
- December 1st: Annual Service-Wide Organization Chart package is sent up to the FWS Director.

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U.S. Fish and Wildlife Service
ORGANIZATION CHART EXPRESS

MODULE 5: ADMIN FUNCTIONS IN OCX (ADMIN)

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Module 5: ADMIN Functions in OCX (ADMIN)

Administrator, or Admin roles within OCX are responsible for additional functionality in the system, including user account maintenance. There are two levels of OCX Administrators: Regional Administrators and System Administrators. While the responsibility is similar around Regional and System Admin roles, there are a few key differences in access. Specifically, Regional Administrators can perform all functions that HMs can within the Region to which they have access, but cannot sign in as HR or Supervisor. System Administrators, on the other hand, can perform all roles within all regions, regardless of the organization code or status of packages. Below are some of the details of what Administrators can do within the OCX system, based on the workflow:

DRAFT STATUS	
System Admin	• Can access and make edits to all sections of all Org Charts from MY TRACKER and Search. • Can *Submit for Review or Submit for Approval* when Org Chart is in Draft by the Developer/HM via Search & MY TRACKER
Regional Admin	• Can access and make edits to all sections of all Org Charts in their Regions from MY TRACKER and Search. • Can *Submit for Review and Submit for Approval* when Org Chart is in Draft by the Developer/HM via Search & MY TRACKER
REVIEW STATUS	
System Admin	• Can access and make edits to all sections of all Org Charts in all Regions from MY TRACKER and Search. • Can *Submit for Approval* when Org Chart is in Review by HR via Search & MY TRACKER
Regional Admin	• Can access and make edits to all sections of all Org Charts in their Regions from MY TRACKER and Search. • Can *Submit for Approval* when Org Chart is in Review by HR via Search & MY TRACKER
APPROVAL	
System Admin	• Can access and make edits to all sections of all Org Charts in all Regions from MY TRACKER and Search. • Can *Sign and Publish* when Org Chart is in APPROVAL via Search & MY TRACKER
Regional Admin	• Can access and make edits to all sections of all Org Charts in their Regions from MY TRACKER and Search. • Can *Sign and Publish* when Package is in Approval via Search & MY TRACKER

Administrators also have the ability to add new users, edit users, and inactivate users. However, all users must have an active directory account in order to be able to be added to the OCX module.

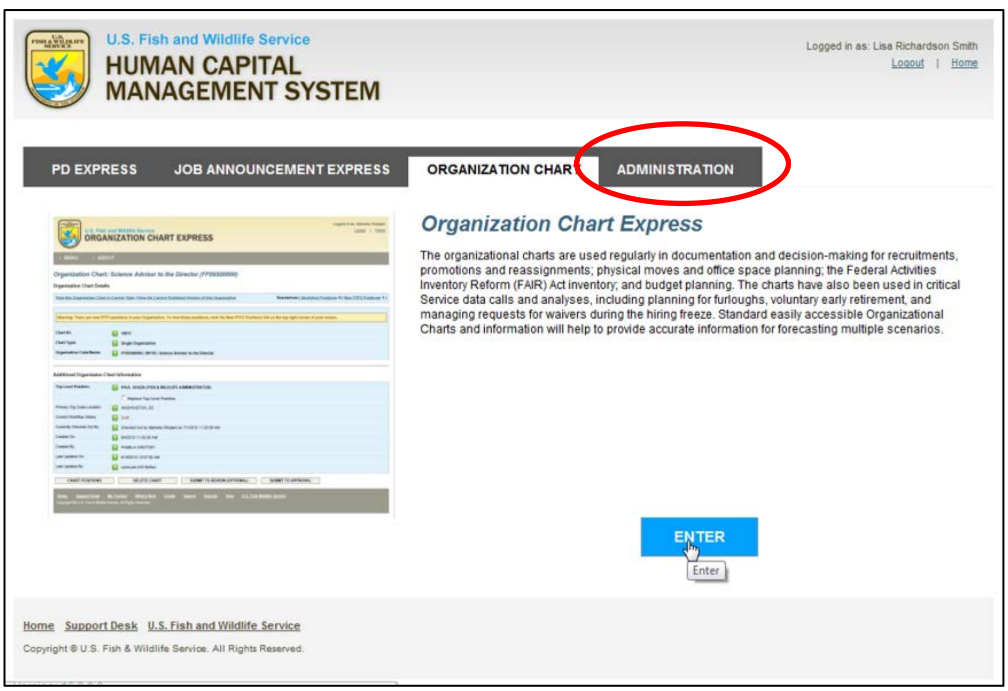
System Administrator: The System Administrator activates/inactivates, and modifies user accounts for the entire Agency. The role also allows the System Admin to maintain HCMS tables and to create announcements across the Agency. The System Admin can also complete the Hiring Manager and Human Resources functions in HCMS across the Agency.

Regional Administrator: The Regional Administrator activates/inactivates, and modifies user accounts for their entire Region. The role also allows the Regional Admin to maintain Region table(s) and to create announcements across their Region. The Regional Admin can also complete the Hiring Manager, and Human Resources functions for their Region.

Administration Tab in HCMS

To log in as an Administrator, you can use the HCMS portal. Your OCX login is synchronized with your Active Directory network account, and your access level based on your status within the system (Regional or System Administrator).

As an administrator, once you have logged in to The Human Capital Management System (HCMS) you will see a tab titled “Administration”. This tab is a web-based tool that enables FWS Regional and System Administrators to administer access to both PD Express, JAX, and the OCX system.



Once you have logged in and accessed the Administration tool, you will see tabs at the top and left. The tabs at the left are the primary level tabs, and those at the top are the filters for the left tabs.

For instance, if you choose the SEARCH tab at the left, you can then determine, using the tabs at the top, if you want to search for a User, for a PD, for organization codes, or for Org Charts in OCX. We'll detail the two left menu items below:

SEARCH: Allows you to Search using the tabs across the top. You can search by User, Position Description, Organization Code, or within OCX. We'll cover each of these in more detail.

ADD USER: Allows you to add a brand new user to the HCMS system (both PD Express and OCX).

The SEARCH Function

As an Administrator, you can Search using the tabs at the top to filter what you are searching for. There are four tabs at the top for which you can search. These are: User, Position Description, Organization Code, and JAX. We will not cover the administrative information associated with the Position Description, Org Code administration, or JAX since that was covered previously in the PD Express and JAX training. Instead, we'll focus on User Administration.

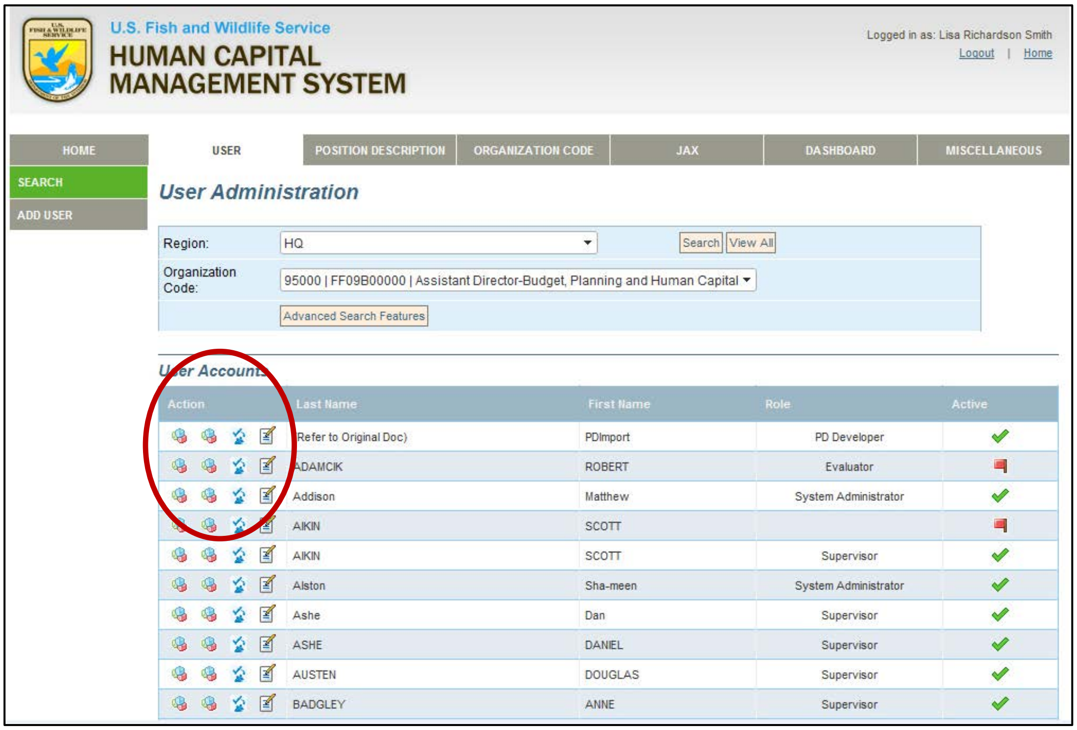
When to Search by USER

As an Administrator, you will search for a User when you need to find all Org Charts that the user has created, or when you need to maintain the user's account. When searching for a user, you will have to know both the Region and Org Code to which the user is assigned, or the user's first and last name. Either of this information will allow you to search for the user, and return appropriate search results.

To Search To Search for a User Using the Region and Org Code:

1. **Click SEARCH on the left Menu**
2. **Choose the USER tab at the top**
3. **Choose the REGION that you wish to Search**
4. **Choose the ORG CODE within the Region**
5. **Click SEARCH**

6. Results will appear at the bottom of the screen.

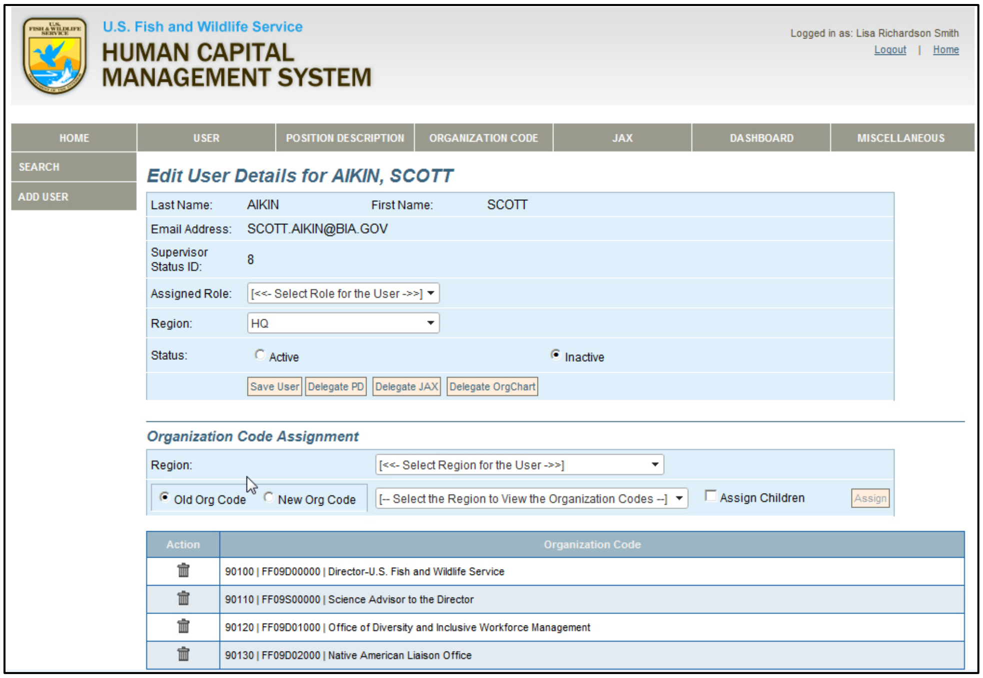


From here, you can use the icons to the left of the user to either View the Org Charts that have been created but are not yet published by the user; or edit the User's information.

Viewing the unpublished Ort Charts is useful when the Org Chart developer is not available due to leave, retirement, etc., and you need to delegate the Org Charts to another user (if requested).

Editing the User's information is useful for user account maintenance. As an administrator, you can activate, modify and inactive user accounts manually, although these types of updates are typically done on an ad hoc basis and are few in number. You can also assign Regions and Org Codes to users.

However, you cannot edit the user's name, email address, and Supervisory Status ID as that information is synched with active directory, and thus is not editable.



Editing Assigned Role

You can edit a user's assigned role and region in the HCMS system.

1. Use the drop down selections provided for the user, to **choose the revised Assigned Role and Region for the user**.
2. **Click the SAVE USER button** to save your revisions.

Editing a User's Status

You can edit a user's status – either setting the user to inactive, or reactivating a user within HCMS from this page as well.

1. **Select the INACTIVE radio button**.
2. **Click the SAVE USER button** to save your revisions.

This will cancel the user's access to the HCMS system (both PD Express and JAX) but will not delete the user from the system. Therefore, a user account can be reactivated if necessary.

1. **Select the ACTIVE radio button.**
2. **Click the SAVE USER button** to save your revisions.

HELP

A user with PDs, Job Announcements, or Org Charts in DRAFT, REVIEW, REVISE, or FINAL REVIEW cannot be inactivated.
Instead, you must work with the user to complete all active PDs and/or delegate PDs to an eligible user account before deactivating the user.

Adding Regions and Org Codes to a User

An Organization Code is the key to user access within both OCX. Organization Codes drive a user's ability to create, edit, and view Org Charts. HCMS will automatically assign Org Codes based on the user's FPPS org code when the account is first created. And, HCMS will add additional codes to the user if the FPPS data changes, but removal of invalid Org Codes are a manual process request to the Regional Administrator.

To Add an Org Code to a Specific User:

1. **Select the Region** from the dropdown.
2. **Select the ORG Code** from the dropdown.
3. **Click the ASSIGN button**.
4. Repeat these steps until the user has access to all necessary codes.

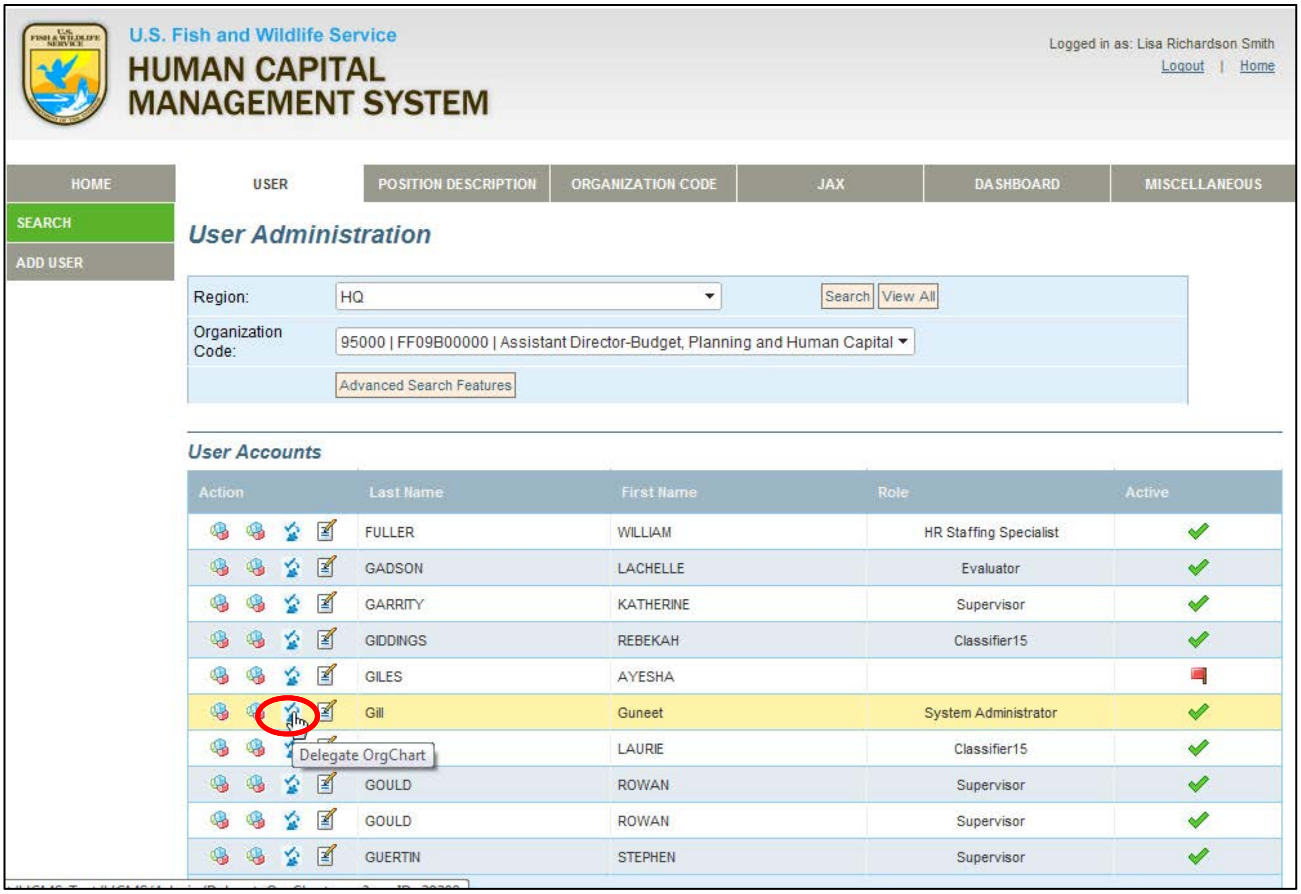
HCMS also allows the assignment of Org Codes via a parent/child structure. Clicking on the ASSIGN CHILDREN box next to the Org Code dropdown will update the user's profile with the new Org Code and any child org codes associated with it.

To Remove an Org Code:

1. From the Action column to the left of Org Codes list, cli**ck on the delete icon to the left of the Org Code which you want to remove**.

Delegating Org Charts

If a user is working on an Org Chart, and goes on leave for substantial amount of time, Admin users have the capability to assign the Org Charts that the user was working on to another user in their Org Code.



To Delegate an Org Chart

1. **Select the Delegate Org Chart button** under User Details
2. Locate the Org Chart that needs to delegated
3. **Click on the Delegate <u>this Organization Chart to Another Individual</u>** hyperlink, which provides with a drop down list of people that currently have access to the Org Code. If you cannot see the user in the dropdown list, check to see if that user has access to the Org Code in which Org Chart resides.
4. **Select the user from the drop down** to delegate the org chart to
5. **Click on Assign** hyperlink

The ADD USER Function

The Add User function allows you to add a user to HCMS. The user must already have an Active Directory account, and you must know the user's first and last name, or email address in order to search for the user from the Active Directory and add them to HCMS.

To Add a User:

1. **Click the ADD USER link** on the left.
2. The SEARCH window will open.

3. **Enter the Users first and last name, or email address**.
4. **Click SEARCH**.
5. The ADD USER box will appear.
6. **Select the User's name from the USER dropdown**.
7. **Select the user's role from the ROLE dropdown**.
8. **Select the user's region from the REGION dropdown**.
9. **Click the ADD USER button**.

If the user was added successfully, a note will display

OCX Issue Tracker

To centralize and manage user requests for Regional and System Admins, HCMS includes a link to the **Support Desk**. This tool allows users to log requests for administrative activities. Administrators' access to requests is dependent upon Admin Type and Region to which they are assigned.

The issue tracker functions exactly as it did for PD Express and JAX, with the addition of OCX issues that can be logged as well, to make the Issue Tracker relevant to the entire HCMS System.

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ORGANIZATION CHART EXPRESS

APPENDIX: ACTIVITY SHEETS

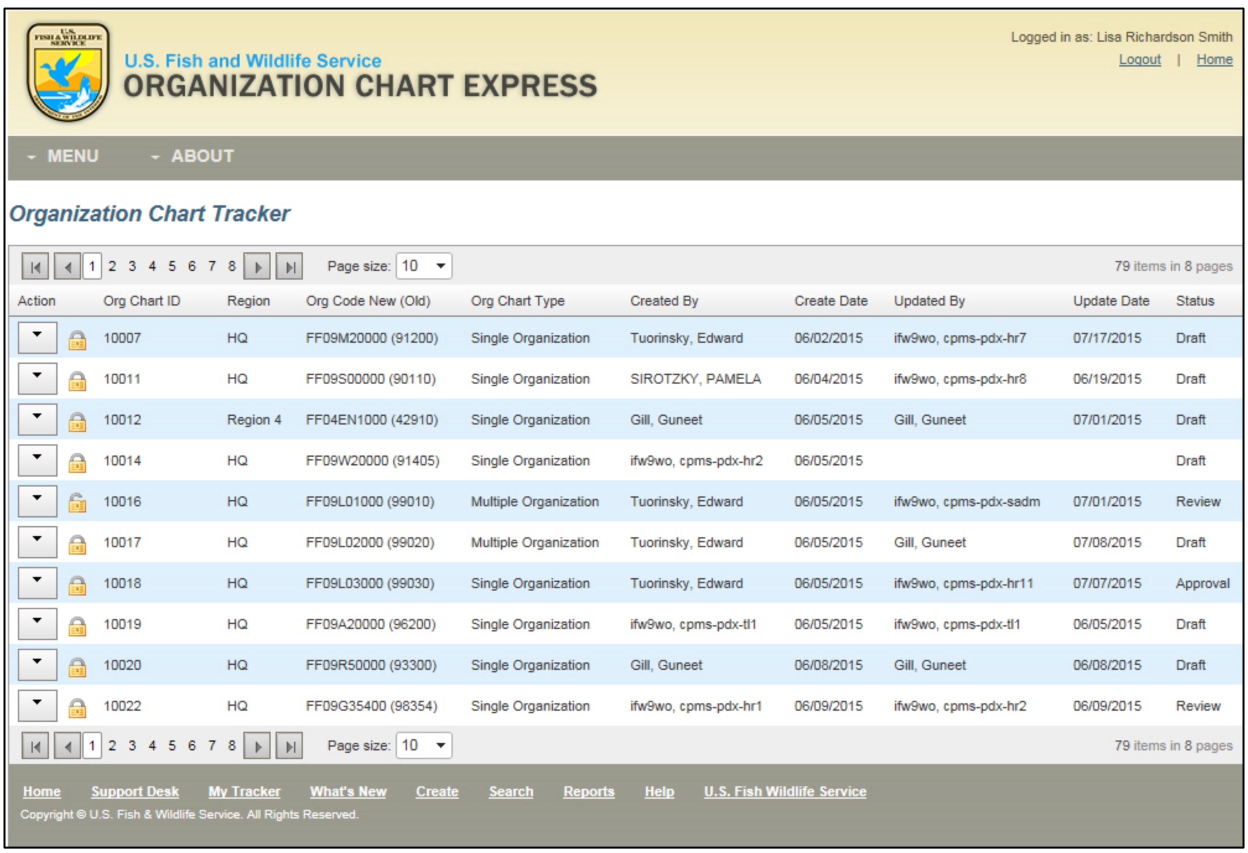
ACTIVITIES for HM, HR, and ADMIN

ACTIVITY 1: LOGIN to OCX and Explore the Navigation (page 13)

1. Access the HCMS Training Site at http://hcms.fws.doi.net/training
2. Click Enter
3. Read the Notice and Click ACCEPT
4. Enter your FWS Active Directory Username and Password.
5. Click OK.
6. Click on the OCX Tab
7. Click ENTER
8. Click ABOUT and then browse the links presented there.
9. Click MENU and browse the links presented there.

ACTIVITY 2: Interpret the MY TRACKER Dashboard (page 16)

1. Review the attached MY TRACKER DASHBOARD graphic.



Action	Org Chart ID	Region	Org Code New (Old)	Org Chart Type	Created By	Create Date	Updated By	Update Date	Status
	10007	HQ	FF09M20000 (91200)	Single Organization	Tuorinsky, Edward	06/02/2015	ifw9wo, cpms-pdx-hr7	07/17/2015	Draft
	10011	HQ	FF09S00000 (90110)	Single Organization	SIROTZKY, PAMELA	06/04/2015	ifw9wo, cpms-pdx-hr8	06/19/2015	Draft
	10012	Region 4	FF04EN1000 (42910)	Single Organization	Gill, Guneet	06/05/2015	Gill, Guneet	07/01/2015	Draft
	10014	HQ	FF09W20000 (91405)	Single Organization	ifw9wo, cpms-pdx-hr2	06/05/2015			Draft
	10016	HQ	FF09L01000 (99010)	Multiple Organization	Tuorinsky, Edward	06/05/2015	ifw9wo, cpms-pdx-sadm	07/01/2015	Review
	10017	HQ	FF09L02000 (99020)	Multiple Organization	Tuorinsky, Edward	06/05/2015	Gill, Guneet	07/08/2015	Draft
	10018	HQ	FF09L03000 (99030)	Single Organization	Tuorinsky, Edward	06/05/2015	ifw9wo, cpms-pdx-hr11	07/07/2015	Approval
	10019	HQ	FF09A20000 (96200)	Single Organization	ifw9wo, cpms-pdx-tl1	06/05/2015	ifw9wo, cpms-pdx-tl1	06/05/2015	Draft
	10020	HQ	FF09R50000 (93300)	Single Organization	Gill, Guneet	06/08/2015	Gill, Guneet	06/08/2015	Draft
	10022	HQ	FF09G35400 (98354)	Single Organization	ifw9wo, cpms-pdx-hr1	06/09/2015	ifw9wo, cpms-pdx-hr2	06/09/2015	Review

2. Complete the following questions:
    a. Which Org Charts are Multiple? _______________
    b. Which Org Charts are in Approval? _______________
    c. Which Org Chart has not been updated since it was created? ____________
    d. Are there any Org Charts that are unlocked? ________________
3. When you have finished, compare your answers to the Answer Key on page 80

Activity 2 Answer Key:

a. Which Org Charts are Multiple? __10016, 10017________
b. Which Org Charts are in Approval? ___10018___________
c. Which Org Chart has not been updated since it was created? __10014_________
d. Are there any Org Charts that are unlocked? _10016______