**ROOSTER ASSIGNMENT REVAMP**

1. **Background**

* No official org chart in place for the entire Division of Budget
* Existing structure: Roster directories in Excel format, which is not optimal for information lookup, challenging to understand reporting line and team hierarchies.

1. **Objective**

* Understand how different tool can tackle the current Roster and explore an interactive and visually representation organization chart
* Preferred layout: Hierarchical (Vertical/Top-Down) Structure
* Has a collapse structure and can accommodate new changes/update given a clean file.
* Final product: able to publish on DOB Online

1. **Scope & timeline**
   1. Scope: In the org chart, one could find the below information:

* Key display contact: Name, title, reporting line (up/down), photo (if any)
* Employee’s extended profile: to be embedded in their according box, including:
  + Agency/Unit/Office one belongs to, agency code
  + Email
  + Phone number/issued cell phone
  + Responsibility/focus expertise: To be updated
  1. Timeline: TBU
     + - Define scope & requirement
       - Data gathering and preparation
       - Tool selection/ design & customize
       - Testing & refinement

1. **Current practices**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Tool** | **Assessment** | **Key Steps** | **Note** |
| 1 | Power BI | Can embed in SharePoint.  Allow clicking on person to view full profile.  Return to main chart with “back” button | Import data-> use custom chart (MAQ/ Hierarchy Slicer) and Drill-through feature |  |
| 2 | Microsoft Visio | Allow importing data from Excel,  Static, limited interaction | Only work on paid version - subscribe plan 2 | Not interactive |
| 3 | Lucid Chart | automatically build charts from imported data (CSV, Google Sheet, Excel) and allows real-time collaboration, only hyperlink, not drill down |  | For paid account |
| 4 | Networkx + pyvis | Show community connection, support node hover, however, require web expertise (Java language) and not hierarchy structure | Export HTML and embed to SharePoint | Not recommend  <https://www.kaggle.com/code/yntrinh/org-chart> |
| 5 | MS Team | Use Azure Active Directory to input the person profile. | Need to work with HR/IT team to get access for editing right |  |
| 6 | Power apps | Interactive org chart with search clickable profile, filtering, can publish to sharepoint. Need to manually design chart layout - |  | Not recommend |
| 7 | Sharepoint | Directly edit on SP- in Plumsail tab (paid) or:  For new SP version, Use Azure Active Directory to get the person profile. | Require admin access to edit.  Can publish to both Team and Sharepoint page | Not customizable |

Networkx + pyvis output sample

Diagram

AI-generated content may be incorrect.

1. **Pilot test**

Scope: DTO office

Data needed

Employee\_ID

Manager\_ID

Employee\_name

Employee\_email

Manager\_name

Employee\_title: Need to have a list of title per employee

Employee\_phone

Employee\_SOW: Need to have a list responsibility per employee