TEMPLE UNIVERSITY "TUChart" Management Overview Training

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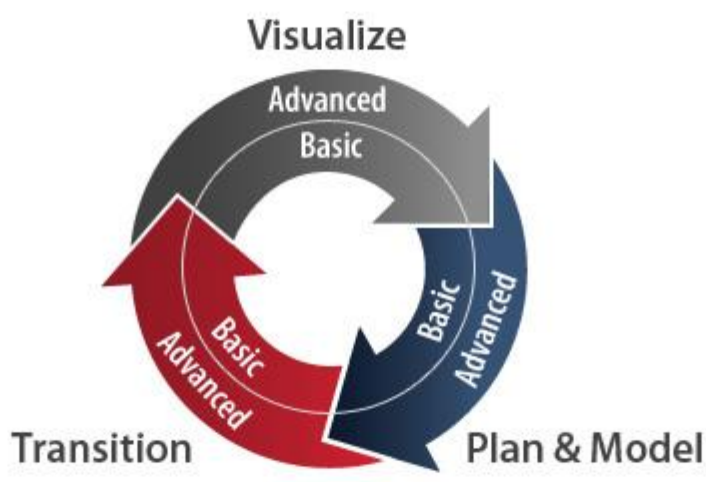
- **Why**
  - Simplify organization charting, hierarchy review, organization planning using consistent Temple software
- **At the end of this training, you will be able to:**
  - View and understand basic navigation of org charts and org trees and key functions
  - Perform searches
  - Publish data
  - Become familiar with Plan & Model charting

More reasons and Benefits of TUChart

- **Current charting done by Department with various software(Visio, etc) and requires data input of all desired display fields**
  - TUChart Software utilizes daily uploaded Banner data assuring more accurate and timely displays of key HR variables typically included on a chart including name, title, posn control #, dept and other demographics
  - TUChart allows charts and data to be printed on PDF or Powerpoint and data may be downloaded to spreadsheets
  - TUChart has robust planning and modeling capability to streamline process of hierarchy updates and restructuring

- **Visualize –** Access and share up-to-date org charts to increase organizational understanding, communicate structure, and provide a basis for decision making
- **Plan & Model –** Create and evaluate scenarios for optimizing your organizational structure for ongoing workforce planning, reorganizations and major events such as mergers and acquisitions



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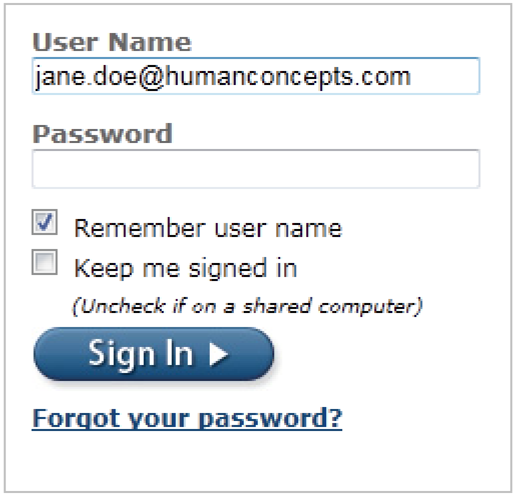
- **Getting Started**
  - Signing in
  - Managing the workspace
  - Account settings and signing off

- **Navigate your browser to the HumanConcepts Suite sign-in page**

  https://www.na.humanconcepts.com/OPUSLocal/SignOn/SignIn.aspx

  - Link to be placed on HR Website
- **Enter your user name and password**
  - If you're a valid user, you will be taken to your company's home page
  - If first sign-in, you may be prompted to download Microsoft Silverlight



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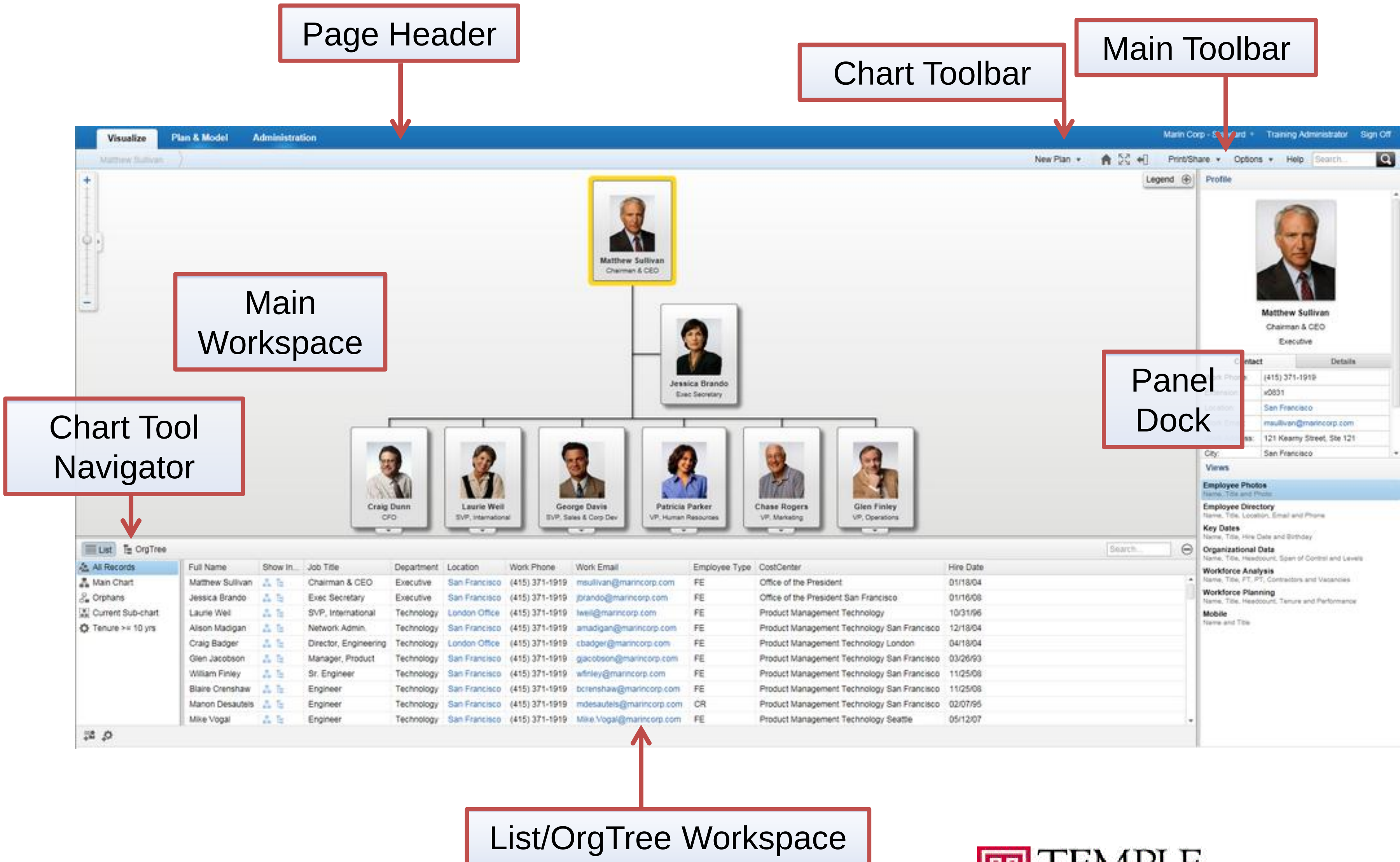
Keys to Visualizing the Organization

- Viewing and navigating org charts
- Viewing employee profiles
- Showing and hiding fields
- Viewing and navigating org trees

- **Searching the Organization**
  - Quick search
  - Advanced search
- **Printing, Publishing and Exporting**
  - Printing charts
  - Publishing charts to PDF
  - Publishing charts to PowerPoint
  - Exporting data to Excel or CSV



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- **Signing off**
  - Click *Sign Off* to end your session
  - Your current workspace settings will be saved

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Visualizing the Organization- more details

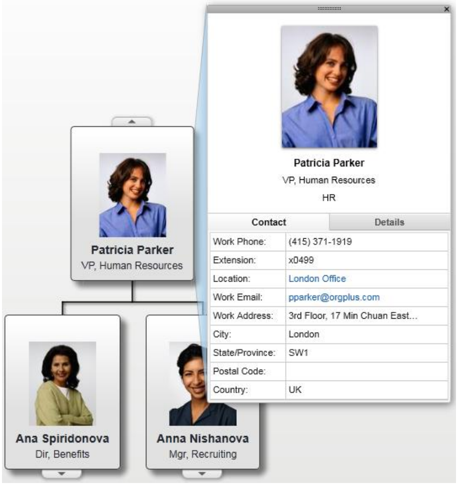
- Formula fields- administrator defined fields such as headcount with values that change based on other fields or relationships
- Showing and hiding fields- The *Fields* tab in the control panel displays all available box fields

Next:

- Viewing and navigating org charts
- Viewing employee profiles and baseball cards
- Viewing and navigating org trees

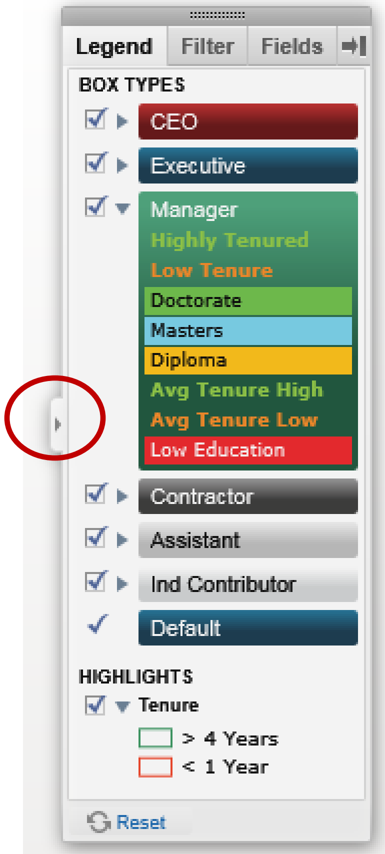
- **View a profile in the side panel**
  - Click an employee in the main panel area to display the employee's profile in the side-panel
- **Tab through a profile**
  - Click a tab to display additional profiles

- **Popup a baseball card in the chart panel**
  - Double-click a box or click the profile button in a box 
  - Drag the card title bar to detach it from its box
  - Detach more than one card to do side-by-side comparisons
- **Changing views**
  - The view controls the contents of the profile panel header (top area) and profile tabs (bottom area)

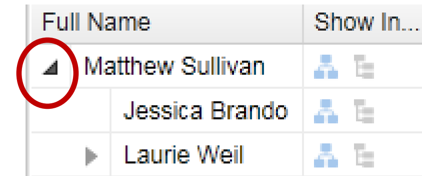


- **Managing the control panel**
  - Click the Control Panel toolbar button to show or hide the panel
  

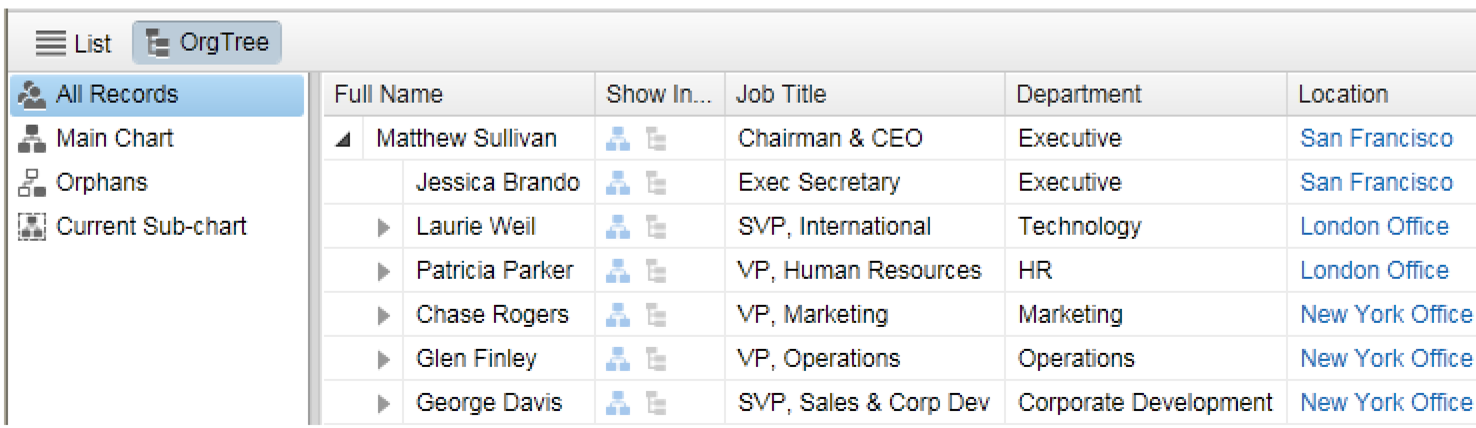
  - Click the side arrow to switch between compact and tab modes
  - Drag the top of the panel (tab mode) to move it to a different location
- **Using the legend**
  - The legend displays the list of available conditional styles
- **When you print a chart, or publish it to PDF or PowerPoint, only the displayed boxes appear in the output chart**



- **Navigate the org tree**



  - Click the side arrows to expand / collapse branches.
  - Very large branches are segmented into navigable pages.
- **Change the display mode**
  - Click the options on the toolbar to display *All Records*, records in the *Main Chart*, *Orphans*, or records in the *Current Sub-chart*



Full Name	Show In...	Job Title	Department	Location
Matthew Sullivan		Chairman & CEO	Executive	San Francisco
Jessica Brando		Exec Secretary	Executive	San Francisco
Laurie Weil		SVP, International	Technology	London Office
Patricia Parker		VP, Human Resources	HR	London Office
Chase Rogers		VP, Marketing	Marketing	New York Office
Glen Finley		VP, Operations	Operations	New York Office
George Davis		SVP, Sales & Corp Dev	Corporate Development	New York Office

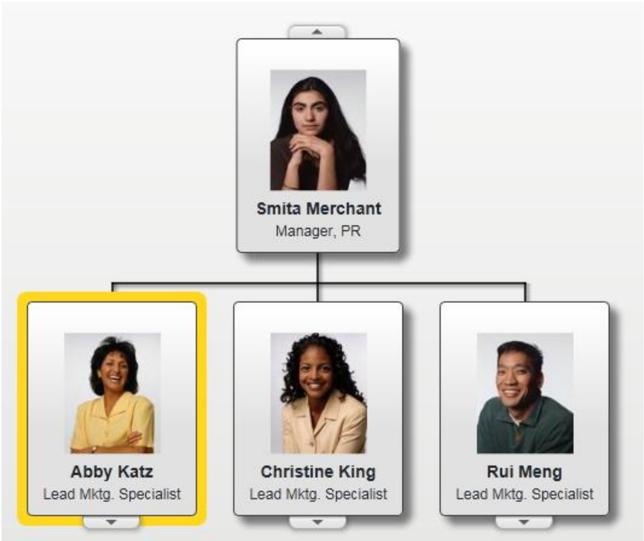
  - Click the button to go to the record's chart box
  - Click the button to go to the record's org tree location

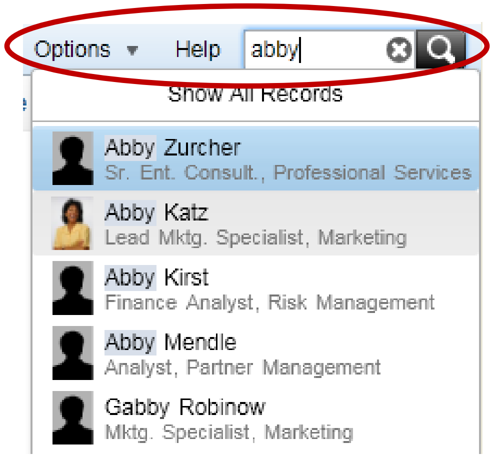
Searching the Organization

- Quick search
- Advanced search
- Using lists

In the *Chart* toolbar:

- Type in the *Search*... field to display a dropdown menu of items with the most relevant matches
- Click an item in the dropdown menu to find the person in the chart





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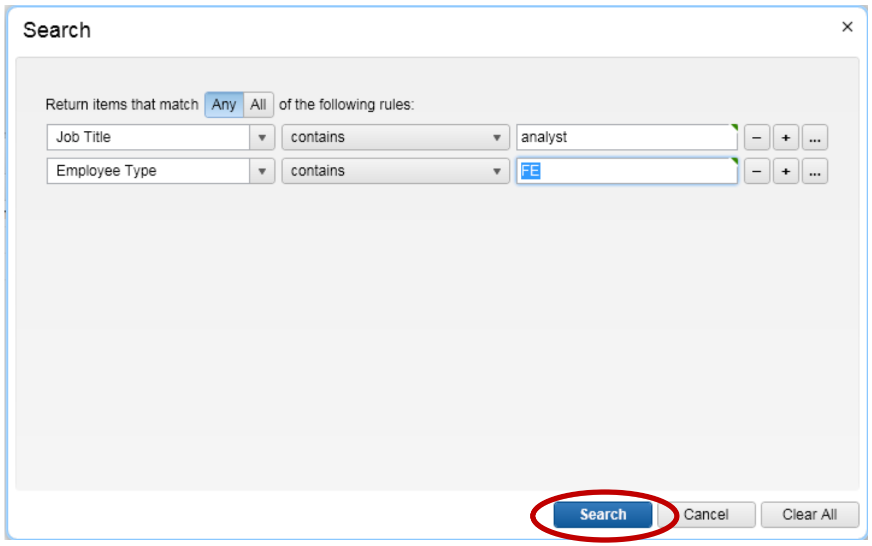
In the *Search* toolbar

– Click the button to enter additional search criteria

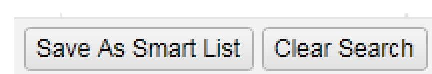


In the search results list

– Click a column header to sort the search results (ascending or descending)
– Drag a column header to move it (change column order)
– Double-click an item (or click the chart icon) to find the person in the chart
– Use the page controls to navigate pages or jump to a page

Next steps

– Use the Clear Search button to clear search results
– Click on the Save As Smart List button to save search results



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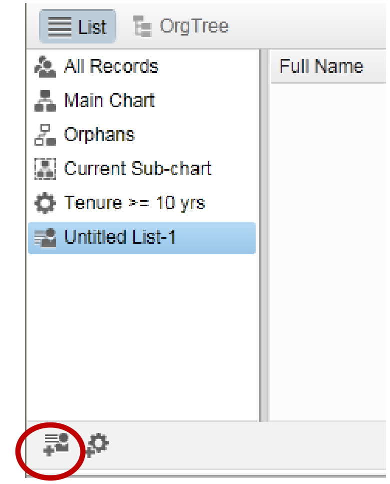
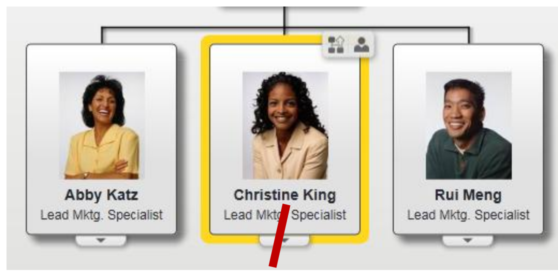
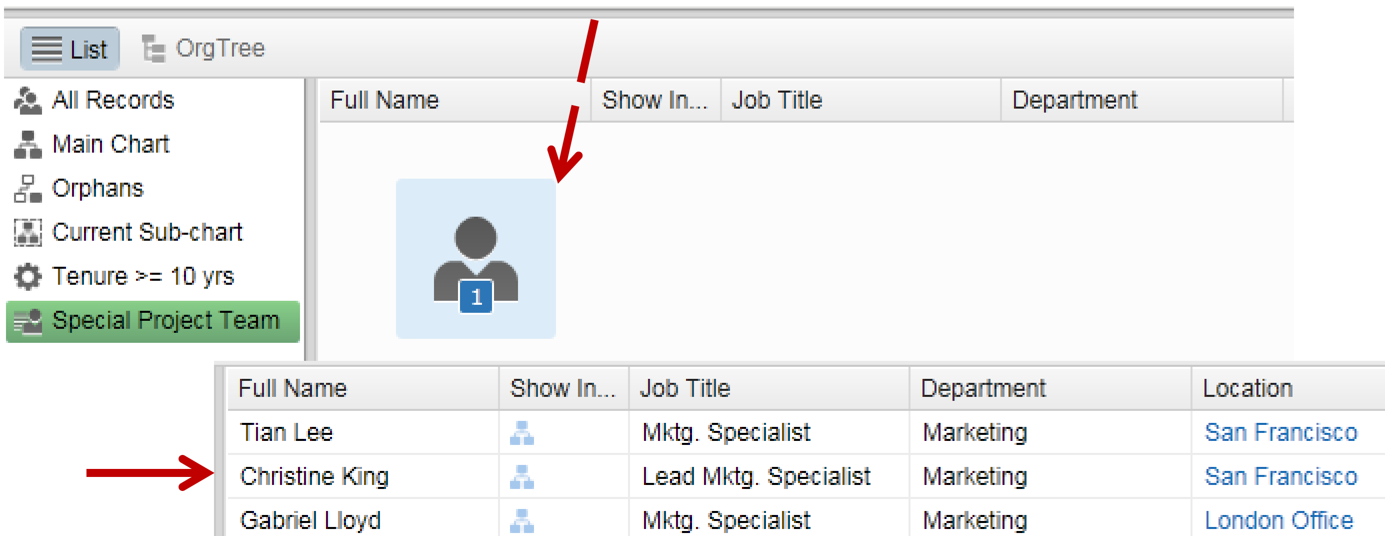
- **In the *List* workspace**
  - Click the button to create a Simple List
  - Enter a name for the list 

  - Drag and drop boxes from the chart into the Simple List

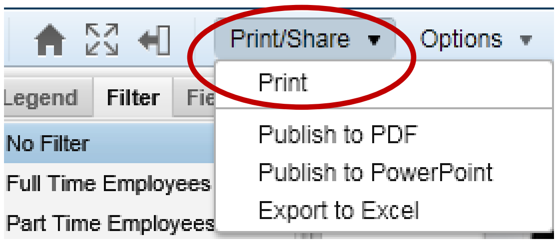


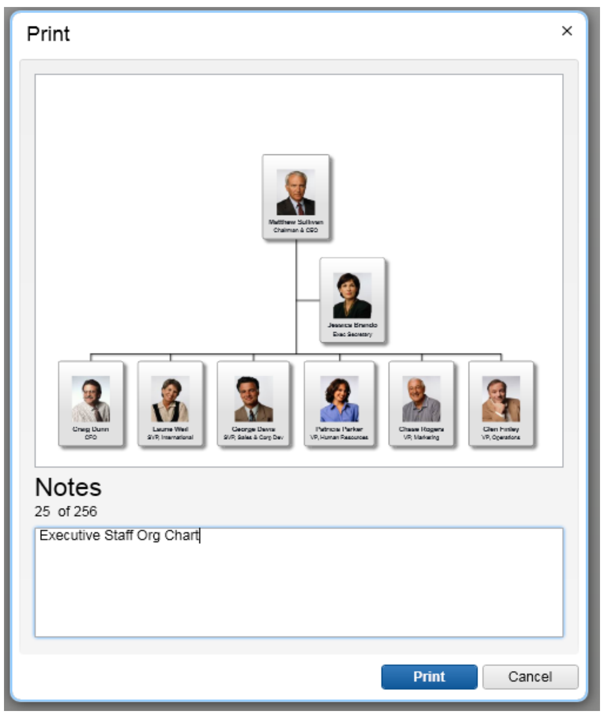




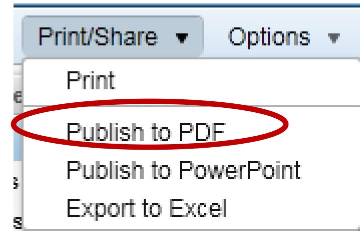
- **Printing, Publishing and Exporting**
  - Printing charts
  - Publishing charts to PDF
  - Publishing charts to PowerPoint
  - Exporting data to Excel or CSV

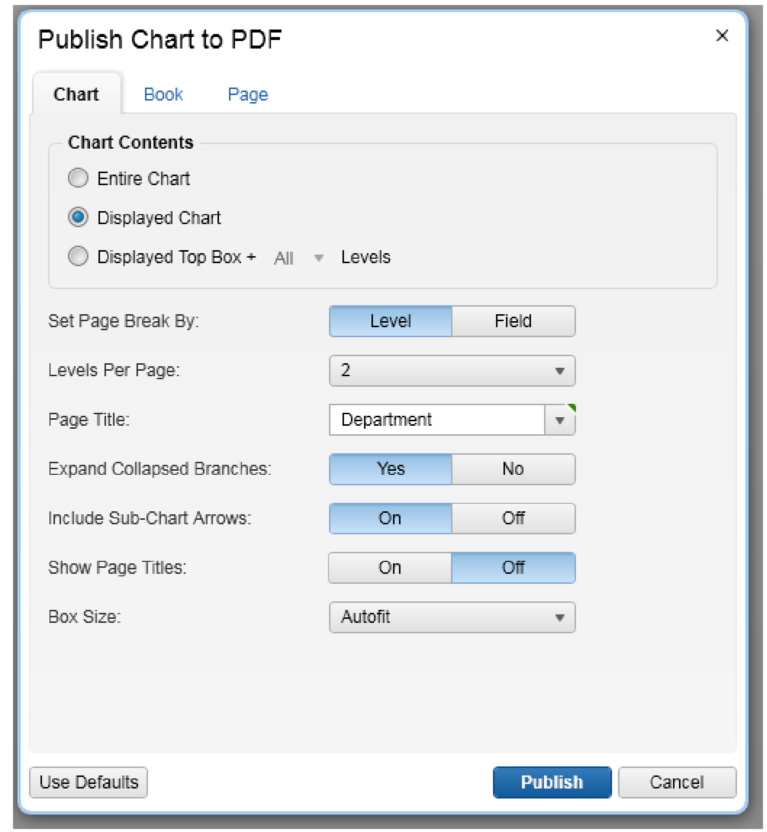
- Select Print from the Print/Share menu
- The current sub-chart is displayed in a preview window
- Enter optional notes that you want to include on the printed page
- Click Print to submit the job and select printer options





- **Customize the contents of your chart, and then select Publish to PDF on the Print/Share menu**
- **Choose from the available options to customize your document**
  - *Chart*: Chart contents and layout
  - *Book*: Cover page, TOC, index
  - *Page*: Page layout, headers, footers
- **Click *Publish* to submit the job**
  - When the job is completed, click *Save* to download the document to your computer





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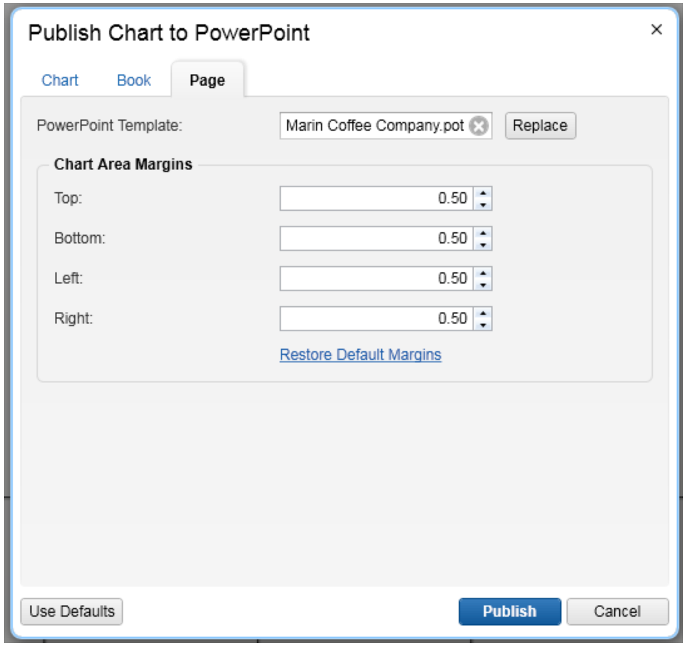
- **Customize the contents of your chart, and then select Publish to PowerPoint on the Print/Share menu**
- **Choose from the available options to customize your document**
  - *Chart*: Chart contents and layout
  - *Book*: Cover page, TOC, index
  - *Page*: PowerPoint template, chart margins
- **Click Publish to submit the job**
  - When the job is completed, click *Save* to download the document to your computer



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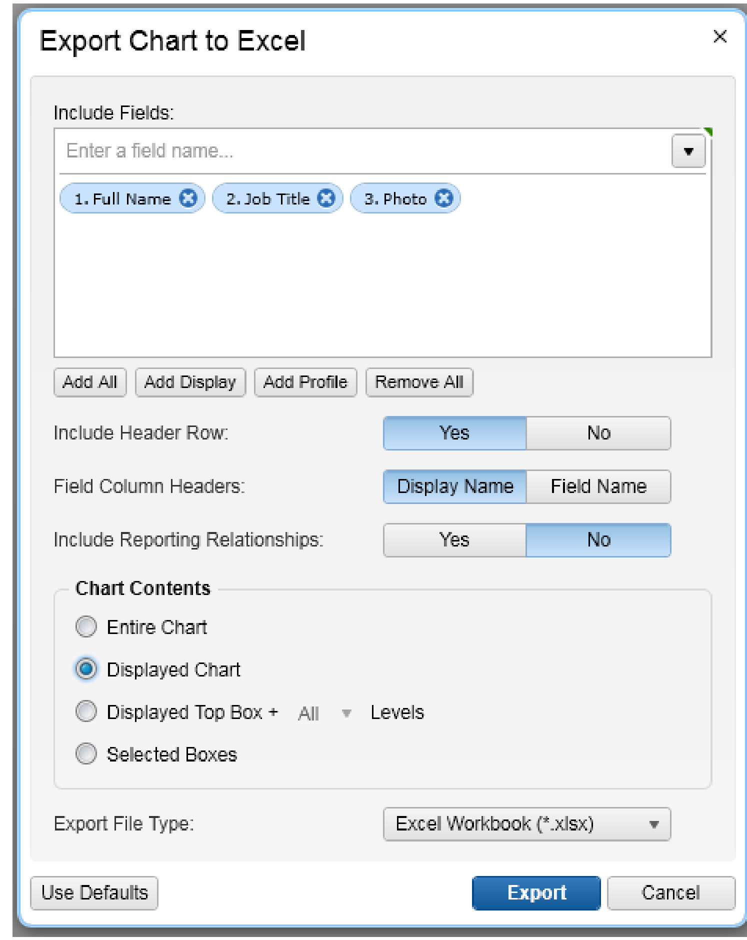
- **At any time, select *Export to Excel* on the Print/Share menu**
  - The currently panel in the main workspace determines what will be exported:
    - Chart
    - Tree
    - Search
- **Choose from the available options**
  - Add or remove fields (chart, search)
  - File type (Excel, CSV)
- **Click *Export* to submit the job**
  - When the job is completed, click Save to download the exported file to your computer



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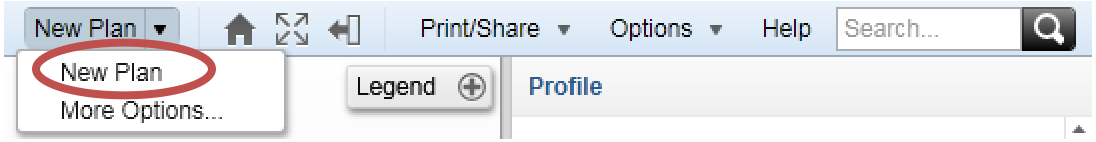
Temple TUChart Security and Roles

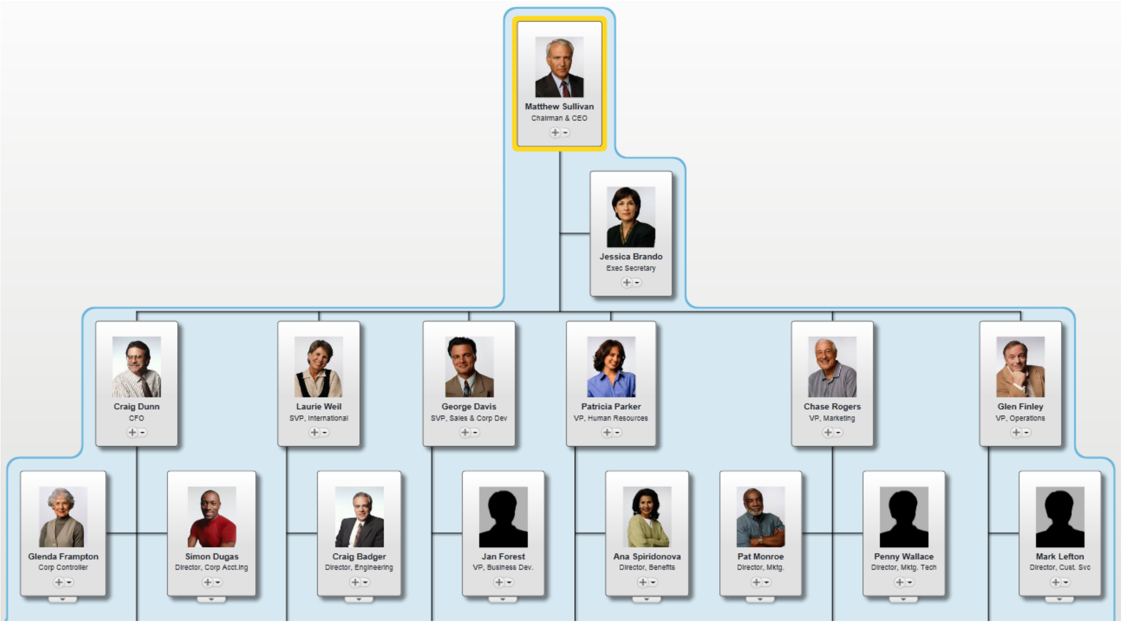
- **Individual Contributor**
  - May view basic contact info for all employees of name, title and department
- **Manager**
  - May view head count and span of control for all employees
  - May plan and model, print and export to spreadsheets
  - May view grade and other metrics for their area
- **Budget Unit Heads**
  - May view grade and other metrics for their area, their manager and peers in their area

- **Plan and Model Fundamentals**
  - Create a new plan
  - Deleting, moving, and adding boxes
  - Editing box fields
  - Updating formulas
  - Saving a plan

- **From the main toolbar, select *New Plan* on the New Plan menu**



- **Blue background indicates boxes you have permission to move / edit**



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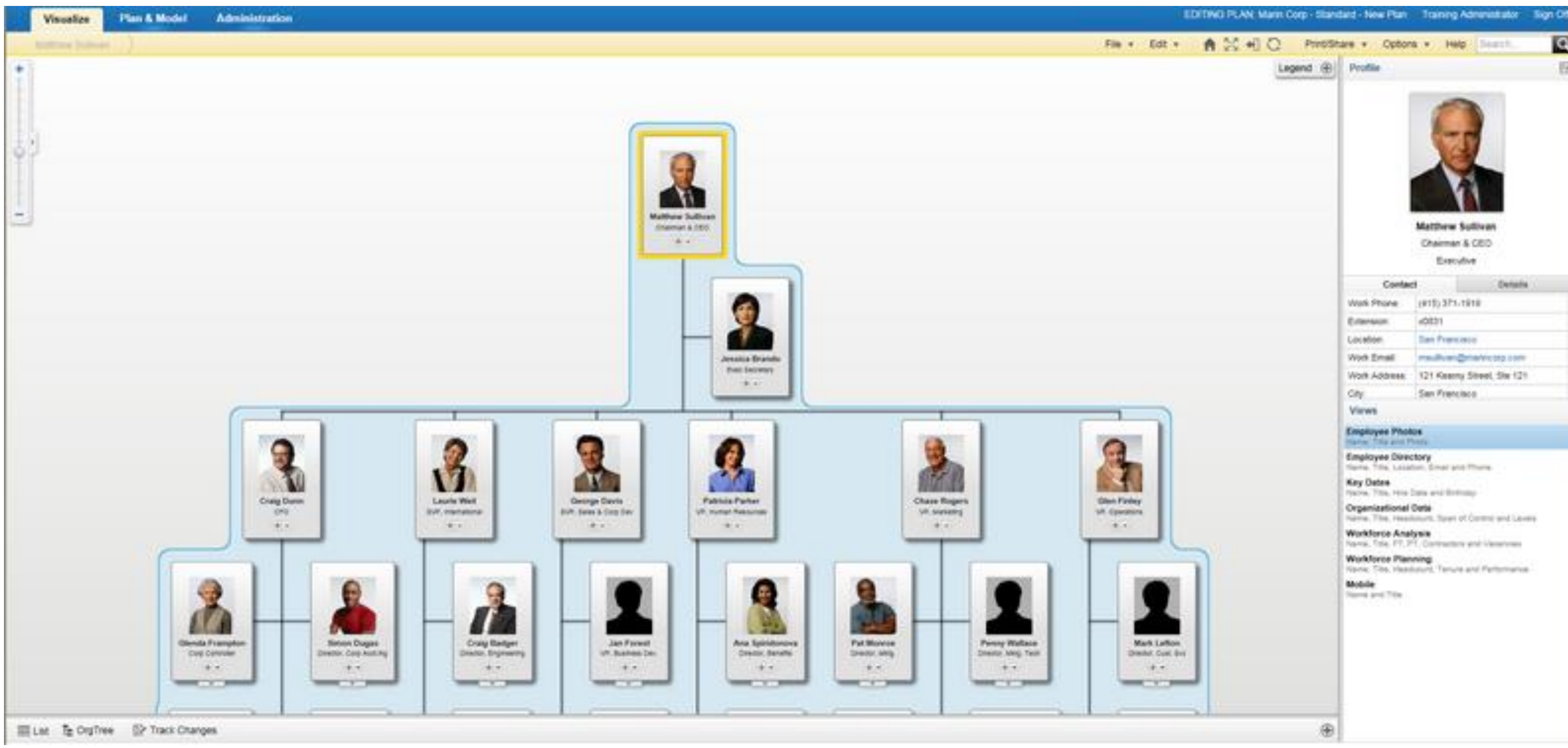
- **Navigating a plan is the same as navigating the main chart**



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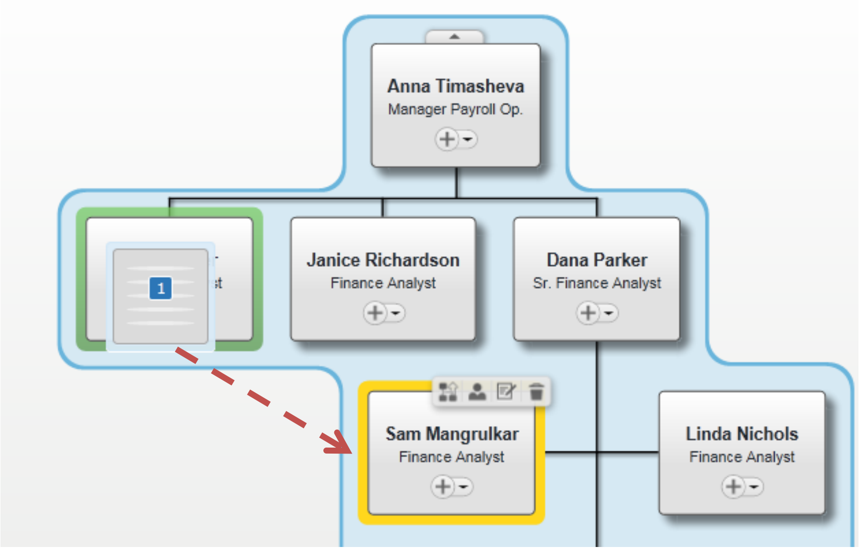
- **You can move a box to a different location in the chart**
  - When moving a box, all subordinate boxes are also moved
  - The number of subordinates is displayed when you drag the box
- **To move a box to a new location in the chart:**
  - Click and hold the left mouse button to select the box
    - *CTRL-click* to select multiple boxes
  - Drag and drop the box over the new supervisor box



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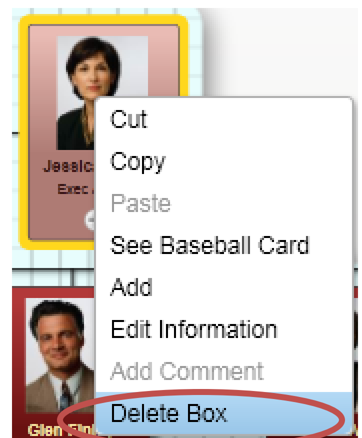
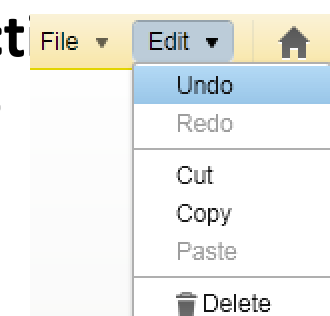
- **To delete a box:**
  - Click the button in the top right corner of a box
    - Or right-click the box and select *Delete Box*



- **You can undo and redo most act ing the Undo and Redo arrows in the toolbar**



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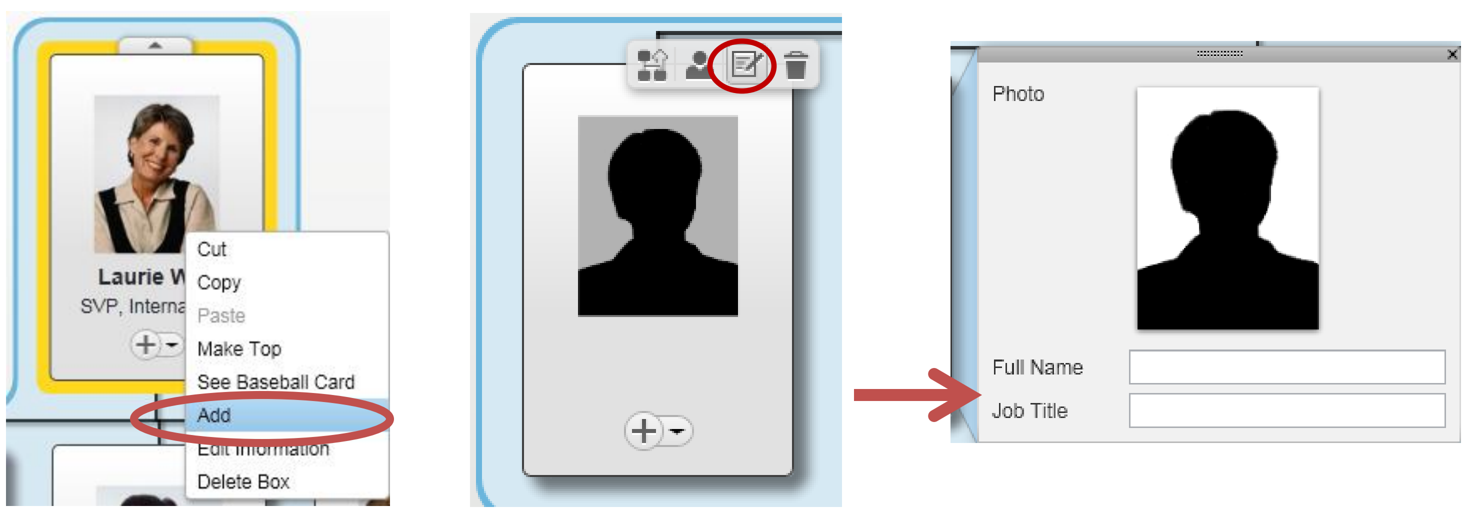
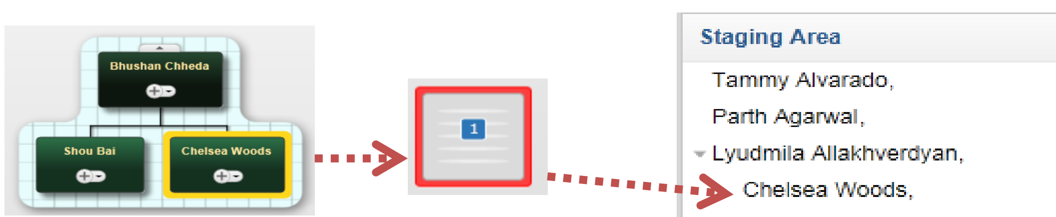
- **To add a box:**
  - Locate the box to which the new box will be connected
  - Click the down-arrow button in the box to display the drop down menu
  - Select the box type you want to add (*Assistant, Manager, Subordinate*)
    - You can also add a subordinate to a box by clicking the (+) button at the bottom of the chart box.
  - You can now edit fields in the new box…



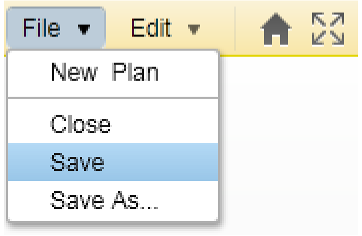
- **If you have permission to edit a box, you can *view* and *edit* all available fields for that box**

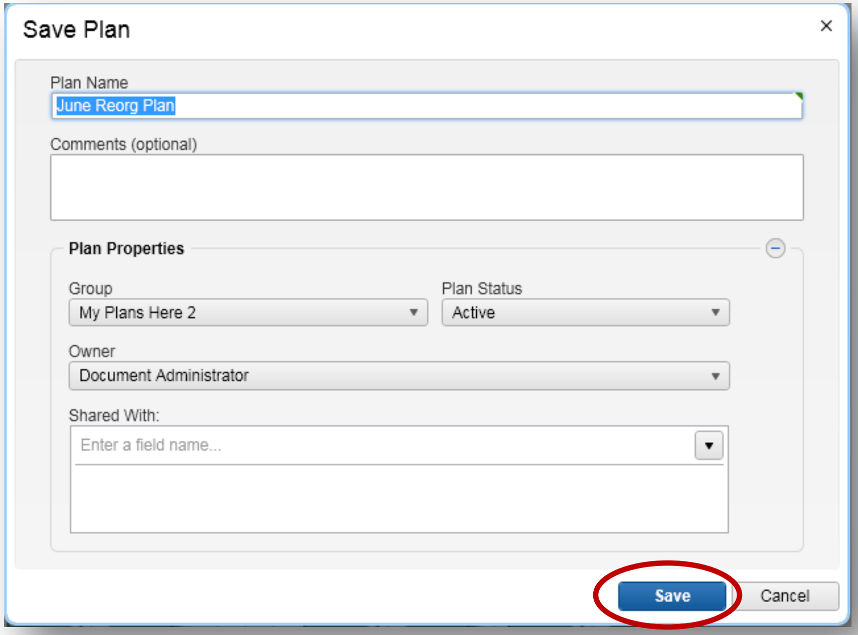
- **To edit fields in a box:**
  - Move your cursor over the box you want to edit
  - Click the *Edit* button to display the *Edit* panel
  - Edit any fields as needed
  - Close the *Edit* panel by clicking outside of it

- **The staging area is a place to temporarily “park” items that you aren’t ready to add to the plan**
- **To move items into the *Staging Area*:**
  - Drag and drop items from the *Chart*, *List* or *Tree* panel into an empty (white) area of the *Staging Area* panel
- **To move items to an existing branch in the *Staging Area*:**
  - Expand branches as needed to expose subordinates
  - Drag and drop items from the *Chart*, *List* or *Tree* panel over the target branch
- **To move items from the Staging Area into the plan**
  - Drag and drop items from the *Staging Area* panel into the *Chart* or *Tree* panel



- Save a plan by selecting the *Save* or *Save As* on the File menu
- Enter a *Plan Name*
- Enter *Comments*, to describe the plan
- Click *Save*





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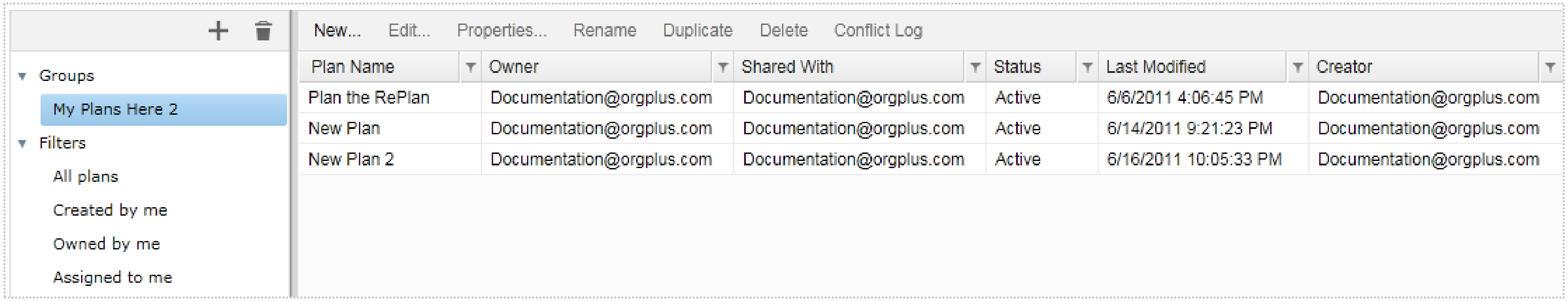
- **Click the Plan & Model tab to view all saved plans**

  - You can see all plans that you created or that have been shared with you

- **Double-click a plan to open and edit it**
  - Or select the plan and click the *Edit*.. button



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    - Tutorials
    - User Guide
    - Technical Support
    - Additional Training Courses