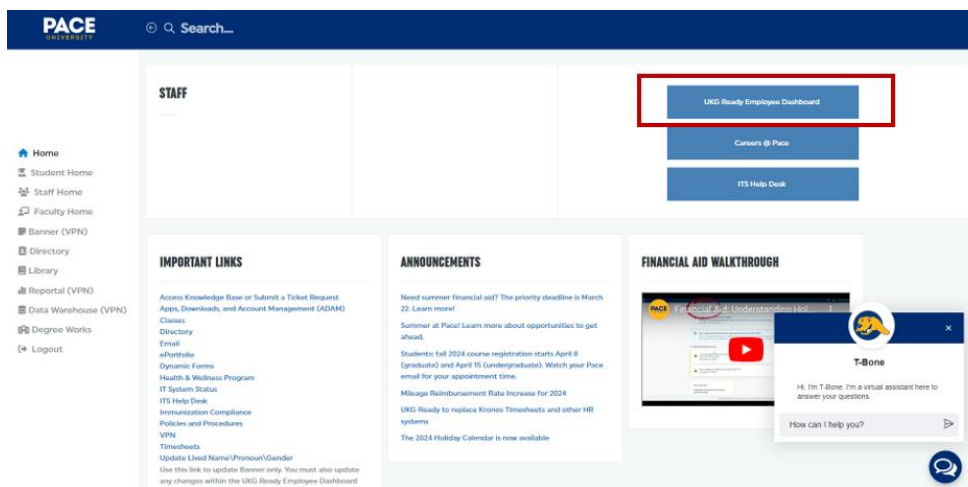


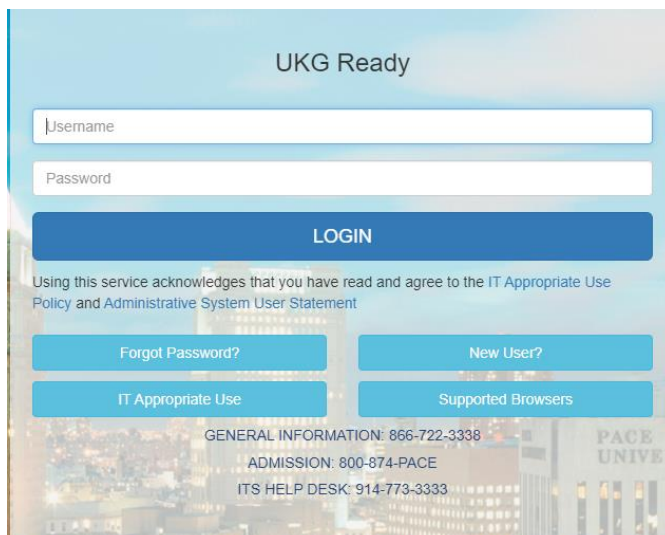
How to View Org Charts in UKG:

This training document is intended to provide instruction on how to view org charts and export them to a PDF file.

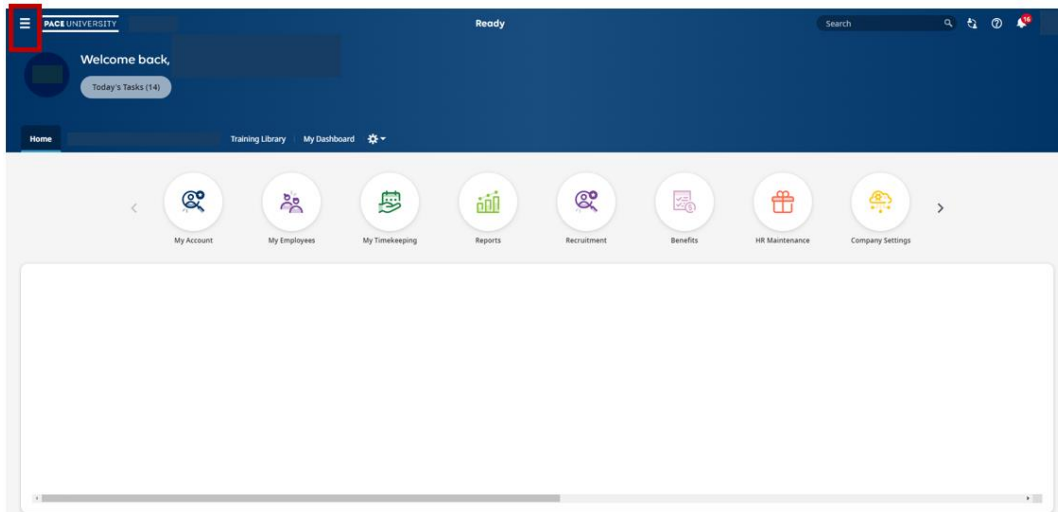
1. Login to UKG by accessing the “UKG Ready Employee Dashboard” tab in [Portal](#)
Click on the “UKG Ready Employee Dashboard” button:



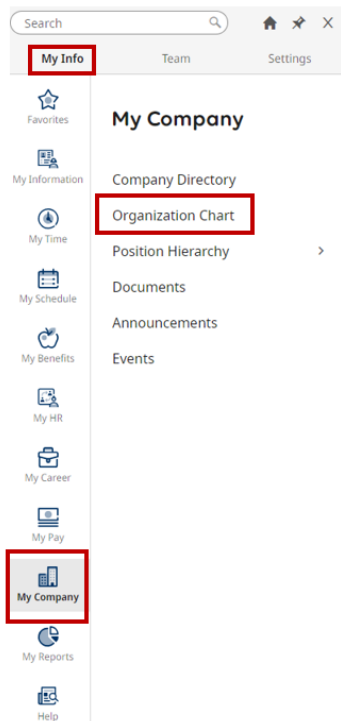
2. Sign in with your Pace credentials:



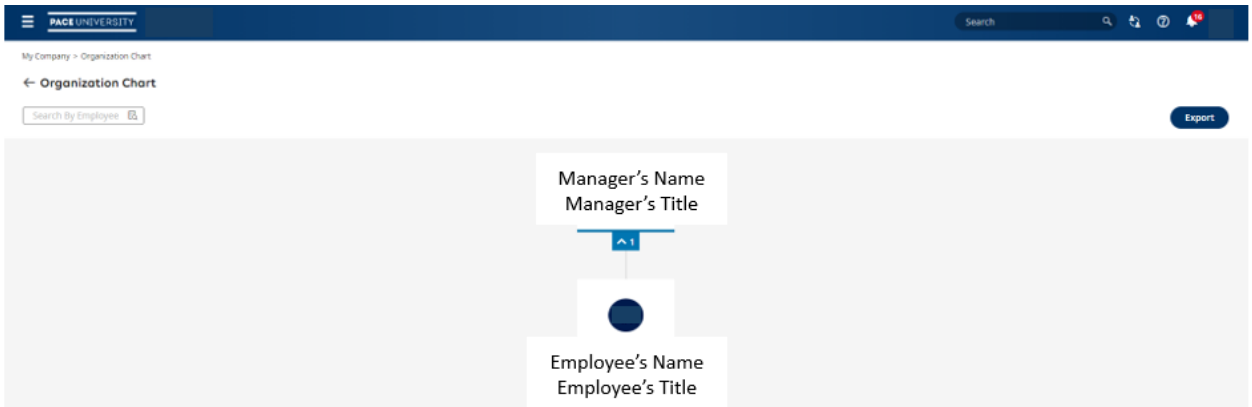
3. From your home dashboard, click on the hamburger menu on the top left corner:



4. Make sure "My Info" is selected, click on "My Company" followed by "Organization Chart":



- Once you load the “Organization Chart” module, your direct reporting line will populate:



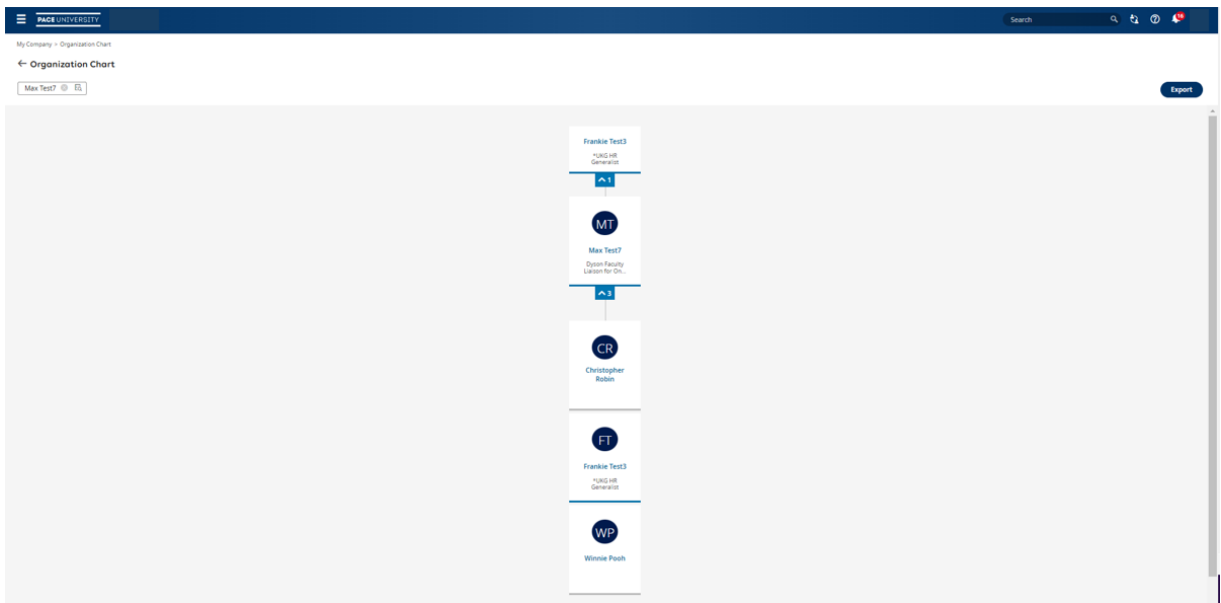
- You can begin to search for an employee by using the “Search for Employee” field on the top left corner. Once you click on the browse menu, a dialogue box will populate allowing you an option to type in the employee’s name. Once you find the employee, you may select using the radio button:

The screenshot shows the 'Organization Chart' interface with the 'Search By Employee' field highlighted in red. An 'Employee Lookup' dialog box is open, displaying a search result for 'Max Test?'. The dialog box includes a search bar with the text 'max test?' and a table with the following data:

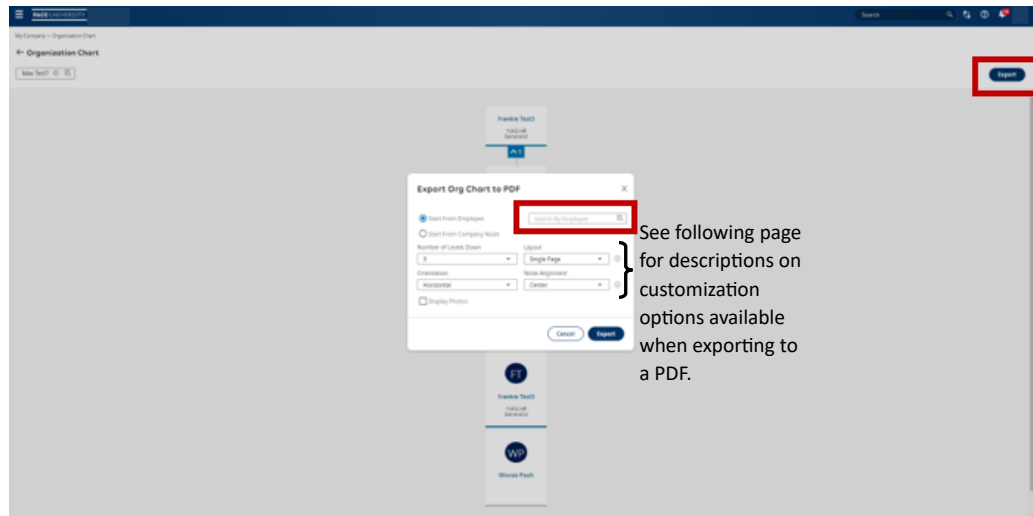
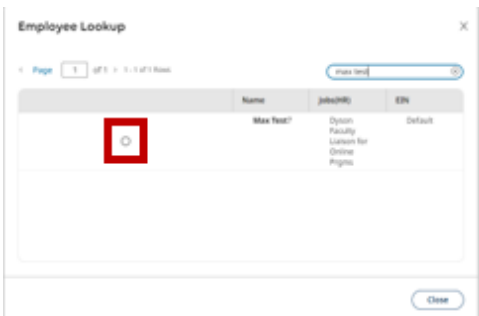
	Name	Job(HR)	EIN
<input checked="" type="radio"/>	Max Test?	Dyson Faculty Liaison for Online Prgrms	Default

The dialog box also includes a 'Page 1 of 1 of 1 Rows' indicator, a 'Close' button, and a search bar.

- Once you select the employee, the org chart will populate showing the employee's direct reporting line and any individuals which report into this employee:
 - For any tiles which have a gray bar highlighted, no employees report to this individual.
 - For any tiles which have a navy blue bar highlighted, this means the employee has a direct report(s).



- If you would like to export an org chart to a PDF, you may click the “Export” button on the top right corner. Your name will automatically populate in the search field. Once you click on the browse menu, a dialogue box will populate allowing you an option to type in the employee's name. Once you find the employee, you may select using the radio button:

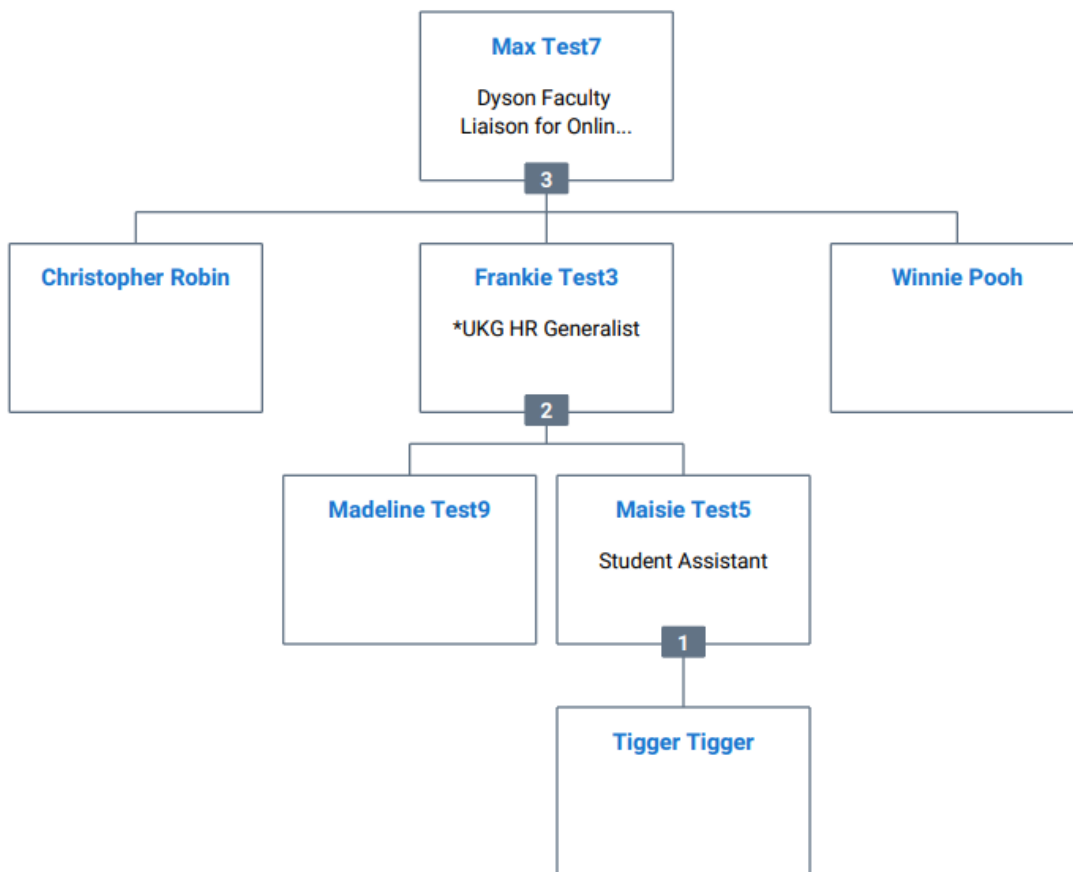


See following page for descriptions on customization options available when exporting to a PDF.

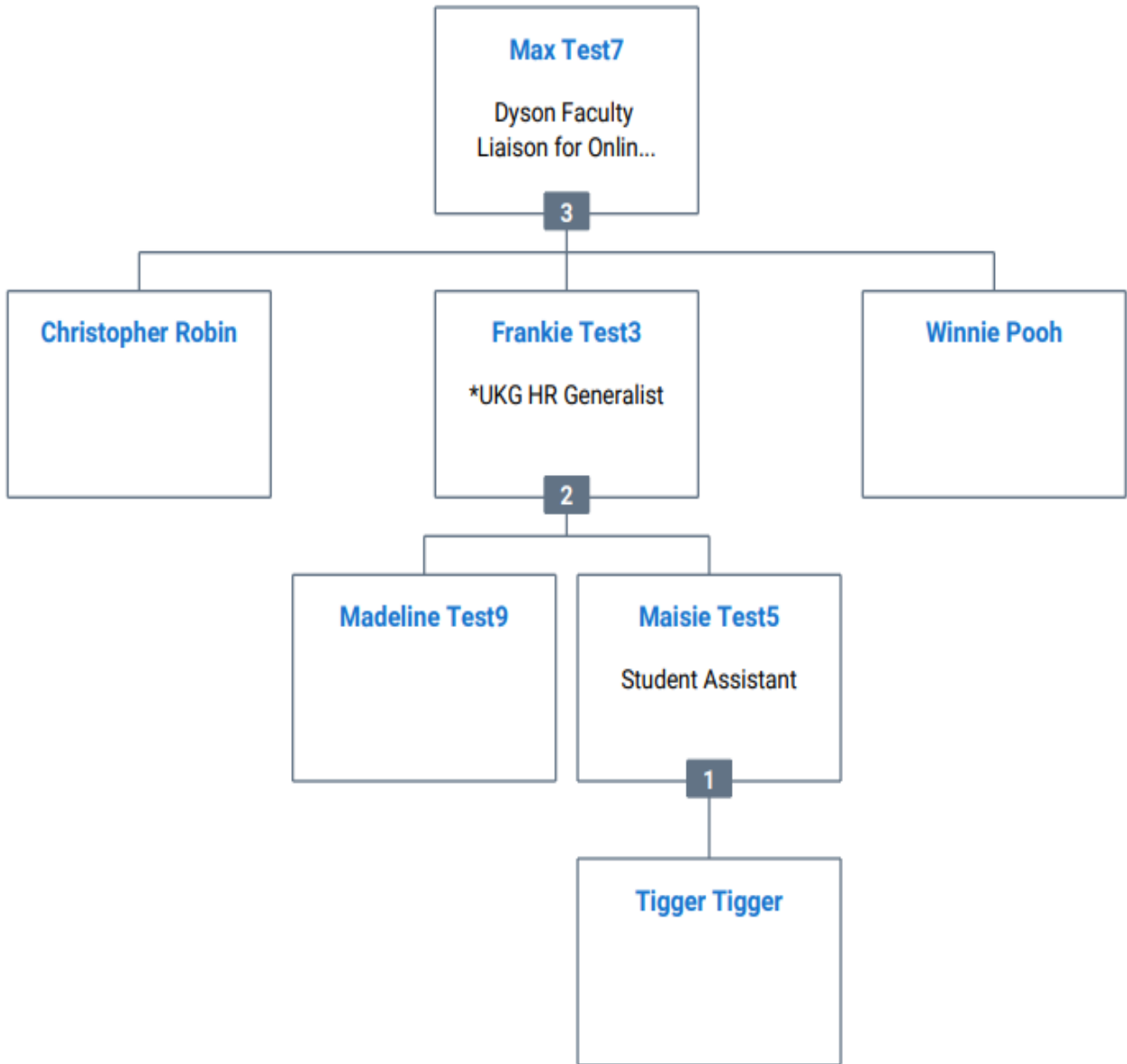
Customization Options available when exporting to a PDF:

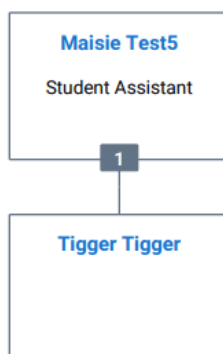
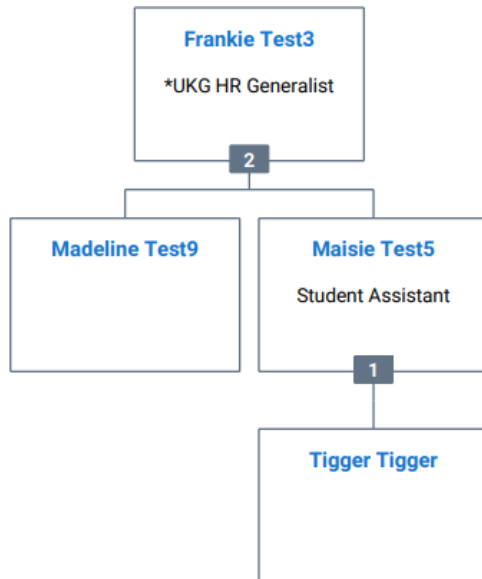
Option	Choices in Dropdown Menu
Number of Levels Down	3,4,5,6,7,8,9,10,ALL
Layout	<p>Single Page: This will display the entire organization chart on a single page.</p> <p>Multiple Pages-Entire Chart: This will split the chart for employee selected in “Start from Employee” in to multiple pages based on the value in “Maximum Levels Per Page.” The depth of the chart will be equal to value in “Number of Levels Down.”</p> <p>Multiple Pages-Per Employee: This will display the chart for each employee within the organization of the employee selected in “Start from Employee” who falls within the “number of levels down” range. The depth of chart for each employee will be equal to “Maximum Levels Per Page.”</p>
Maximum Levels Per Page (for Multiple Pages view only)	3,4,5
Orientation	Horizontal, Vertical
Node Alignment	<p>Center Alignment: All the child nodes will be distributed equally to the left and right halves of the parent node.</p> <p>Left Alignment: All the child nodes will be drawn to the right of the parent node.</p> <p>Right Alignment: All the child nodes will be drawn to the left of the parent node.</p>

“Single Page” and “Multiple Pages-Entire Chart” Layout



“Multiple Pages-Per Employee” Layout

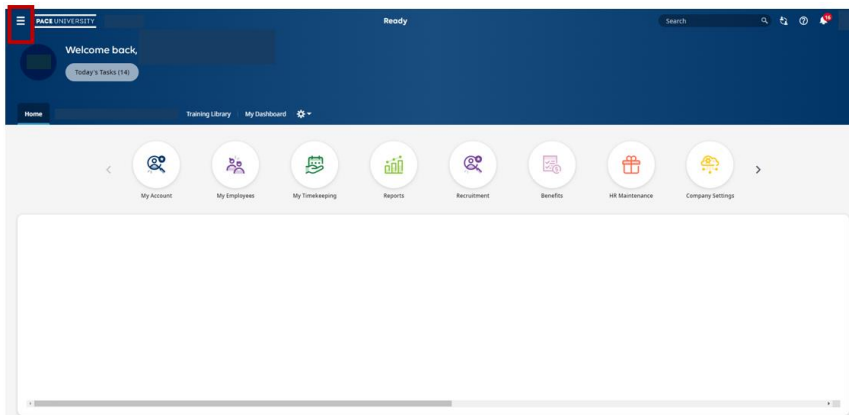




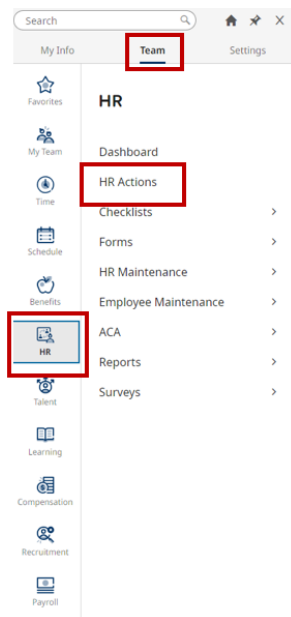
How to Update a Supervisor with an HR Action in UKG:

This training document is intended to provide instruction on how to update an employee's reporting line:

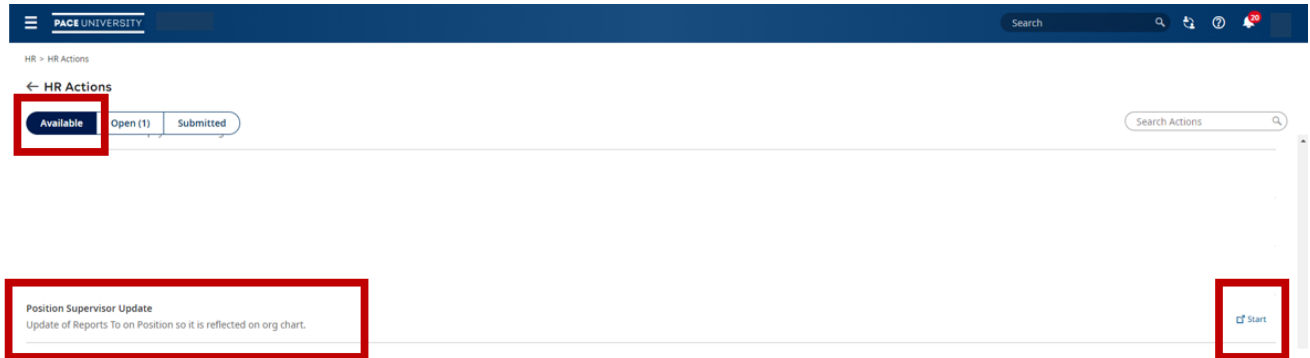
1. From your home dashboard, click on the hamburger menu on the top left corner:



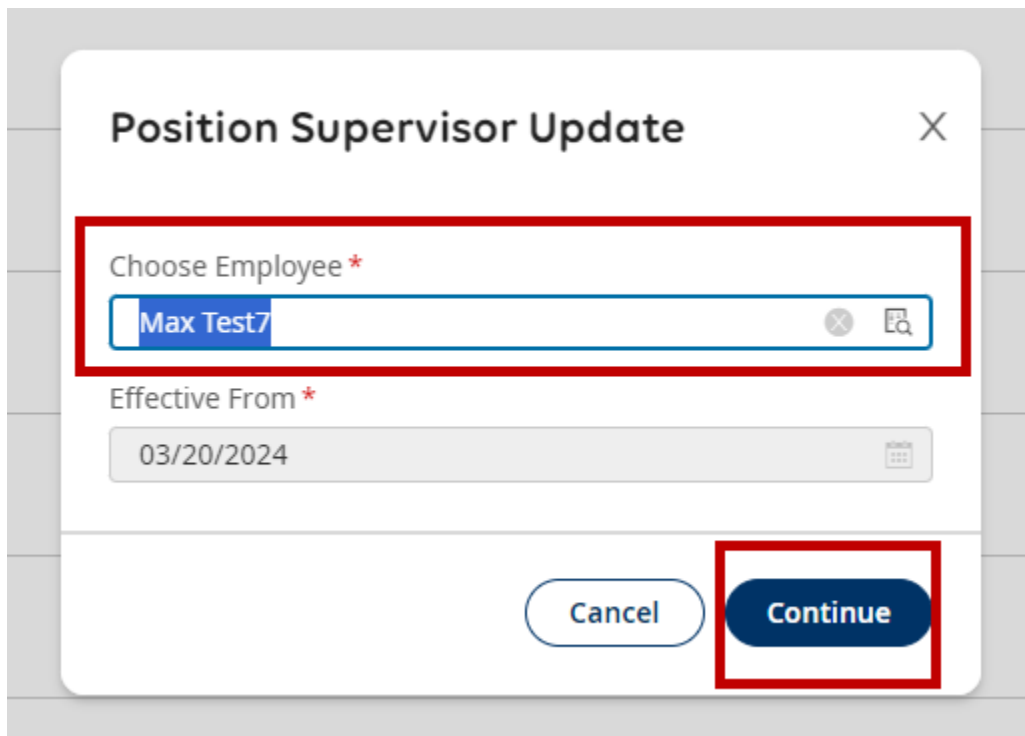
2. Make sure "Team" is selected, click on "HR" followed by "HR Actions":



3. This screen will default to the “Open” tab. Select the “Available” tab to view your HR Actions. Initiate the “Position Supervisor Update” action by selecting “Start” on the right hand side:



4. A dialogue box will populate and you can begin to search for an employee by using the “Choose Employee” browse menu. Once you locate the employee, select “Continue”:



5. The current supervisor will appear. Use the “Browse” menu to search for the accurate supervisor. Once desired supervisor is found, select “Continue” to proceed:

HR > HR Actions

← Position Supervisor Update

Update of Reports To on Position so it is reflected on org chart.

Employee MT Max Test7

Effective From *
03/20/2024

Please update the Manager 1 field with the new manager:
If applicable, please update Manager 2 if an employee has...

Please update the Manager 1 field with the new manager:

Manager 1 *
Frankie Test3

Save Continue

6. If applicable, you may also enter a supervisor in the “Manager 2” field. If this does not apply, you may disregard and click the “Submit” button to initiate the workflow for the update:

HR > HR Actions

← Position Supervisor Update

Update of Reports To on Position so it is reflected on org chart.

Employee MT Max Test7

Effective From *
03/20/2024

Please update the Manager 1 field with the new manager:
If applicable, please update Manager 2 if an employee has more than one manager:

Manager 2
Choose Employee...

Save Submit

The HR action will be submitted to the Compensation team for review and once approved, the update should reflect in the org charts.