

## 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 <u>Portal</u> Click on the "UKG Ready Employee Dashboard" button:

	ତ ଦ Search		
<ul> <li>✿ Home</li> <li>Student Home</li> <li>֎ Staff Home</li> <li>D Faculty Home</li> <li>Baconer (JOPA)</li> </ul>	STAFF		UES fluidy Englique Datibiand Carson @ Pace 115 Help Dati
Banner (VPN)     Directory     Library     Library     Mr Reportal (VPN)     Data Warehouse (VPN)     Data Warehouse (VPN)     Dogroe Works     (e Logout	IMPORTANT LINKS Access Knowledge Base or Schmitt a Takies Response Access Knowledge Base or Schmitt a Takies Response Access Knowledge Base or Schmitt a Takies Response Composition of the Access of Manual Access of A	ARNOUNCEMENTS Meet summer financial and? The priority deadline is March 2. Horn or elli and anno about opportunities to part Summer at fiber about more prioritanties to start Aque 8 (fiber about and a start and a start apprivation). Meet the fiber about and a start apprivation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation of the Aduation	FINANCIAL AD WALKTHROUGH

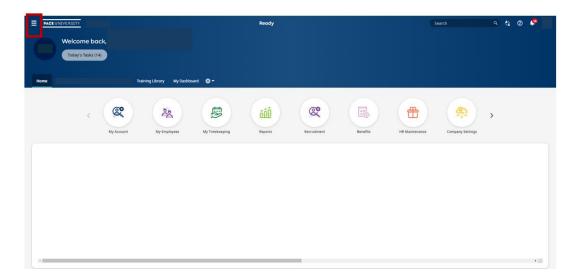
2. Sign in with your Pace credentials:

UKG	Ready
Usemame	
Password	
LO	GIN
Using this service acknowledges that you have	read and agree to the IT Appropriate Use
Policy and Administrative System User Stateme	
Policy and Administrative System User Stateme Forgot Password?	ent New User?
	ent
Forgot Password? IT Appropriate Use	ent New User?
IT Appropriate Use GENERAL INFORM	ent New User? Supported Browsers
Forgot Password? IT Appropriate Use GENERAL INFORM. ADMISSION:	New User? Supported Browsers ATION: 866-722-3338

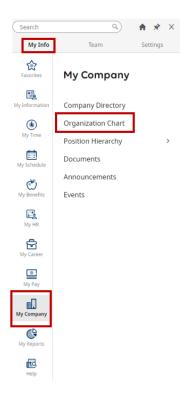
For further assistance, please contact Amanda Miranda, Compensation Analyst at amiranda@pace.edu



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":





5. Once you load the "Organization Chart" module, your direct reporting line will populate:

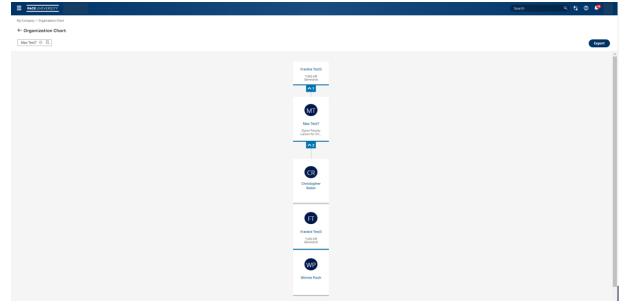


6. You can begin to search for an employee by using the "Search for Employee" field on the top left corner. Once you click on the browse menu, a dialogue box will populate allowing you an option to type in the employee's name. Once you find the employee, you may select using the radio button:

					Search	<u> </u>
My Company > Organization Chart						
← Organization Chart						
Search By Employee 📴						Export
	Employee Lookup			×		
	< Page 1 of 1 > 1-1 of 1 Rows		max test	٥		
		Name	Jobs(HR)	EIN		
	•	Max Test?	Dyson Faculty Liaison for Online Prgms	Default		
				Close		



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).



8. 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:

	N Longer - Spanner ben - Oppingelander
	( top her + E
	Facility Rect
Employee Lookup X	Noted General
C Page 1 of the Little International Constant (Page 1)	
	Expect Org Chart to PDF X
Name Jobs(HR) EIN	Const by Constant and Constant
Max Text? Dyton Default Faculty	Other functionary star
O Liasan for Online	
Papea	the second secon
	record * Gener * Customization
	□ (spin, those
	options available
	when exporting to
	a PDF.
( <b>1</b> mm	Name And
Oter	Vale
	Wirms Path

For further assistance, please contact Amanda Miranda, Compensation Analyst at amiranda@pace.edu

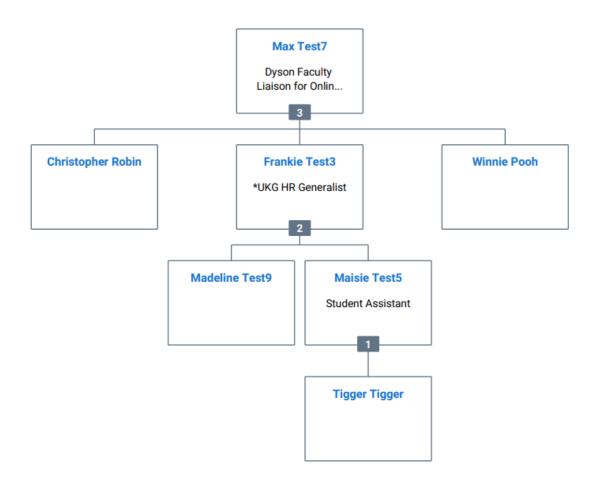


## Customization Options available when exporting to a PDF:

Option	Choices in Dropdown Menu
Number of Levels Down	3,4,5,6,7,8,9,10,ALL
Layout	Single Page: This will display the entire organization chart on a single page.
	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."
	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."
Maximum Levels Per Page (for Multiple Pages view only)	3,4,5
Orientation	Horizontal, Vertical
Node Alignment	Center Alignment: All the child nodes will be distributed equally to the left and right halves of the parent node.
	Left Alignment: All the child nodes will be drawn to the right of the parent node.
	Right Alignment: All the child nodes will be drawn to the left of the parent node.

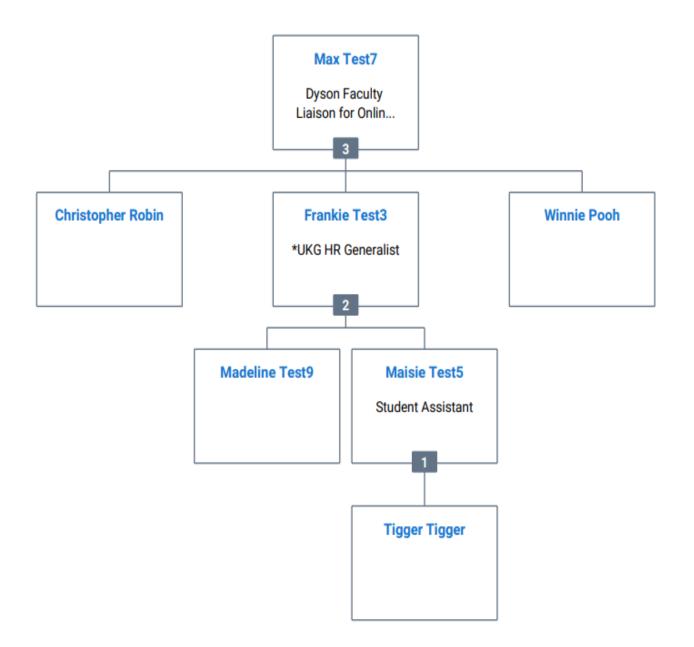


"Single Page" and "Multiple Pages-Entire Chart" Layout

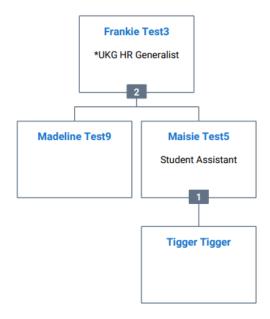


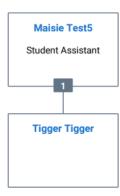


## "Multiple Pages-Per Employee" Layout







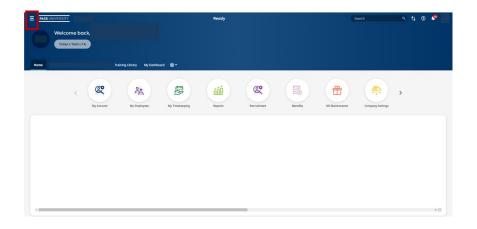




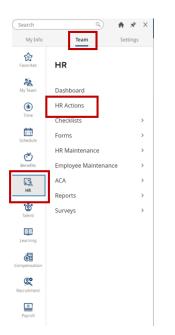
## How to Update a Supervisor with an HR Action in UKG:

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:

	Search	ላ ቲ ወ 🧟
HR > HR Actions		
← HR Actions		Search Actions Q
Position Supervisor Update Update of Reports To on Position so it is reflected on org chart.		🗗 Start

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":

Choose Employee *          Max Test7       Image: Constant of the second sec	Position Superviso	or Update X
		8 Eq.
03/20/2024	Effective From <b>*</b> 03/20/2024	Ninit 



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:

PACEUNIVERSITY		Search	م ي 🖉 🖓
HR > HR Actions			
← Position Supervisor Update			
Update of Reports To on Position so it is reflected or Employee	n org chart. Max Test7		
Effective From * 03/20/2024		Ē	Save Continue
O Please update the Manager 1 field with the new manager:	Please update the Manager 1 field with the new manager:		
If applicable, please update     Manager 2 if an employee has	Manager 1*		Save

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:

PACE UNIVERSITY		Search	ዓ 🐮 ወ 🦑
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			Save Submit
<ul> <li>Please update the Manager 1 field with the new manager:</li> </ul>	If applicable, please update Manager 2 if an employee has more than one manager:		
O If applicable, please update Manager 2 if an employee has			
	Manager 2 Choose Employee		
			Save

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