

## SuccessFactors Tips

### Featured Tip : View and Update the **Org Chart**

**Note:** This guide's primary intended audience is supervisors and managers.

The SuccessFactors Org Chart shows you a visual image of how your organization is officially connected. You can use the Org Chart to view up, down and laterally throughout your organizational structure.



### How To: View the Org Chart

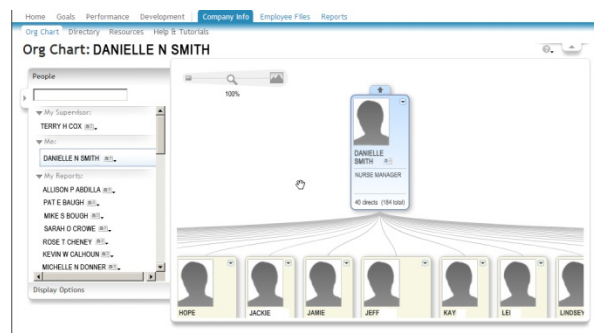
- Go to [www.uab.edu/successfactors](http://www.uab.edu/successfactors).
- Log into SuccessFactors using your BlazerID and Strong Password.

[www.uab.edu/successfactors](http://www.uab.edu/successfactors)

- Click the **Company Info** menu tab.



- This page shows you the Org Chart from your perspective.
- You can navigate the page using your mouse to see your supervisor, your direct reports, ect.
- You can also search to see the organization structure of another employee.



### How To: Update the Org Chart

**Important: It is important for supervisors to view their Org Chart and direct reports each year for accuracy.**

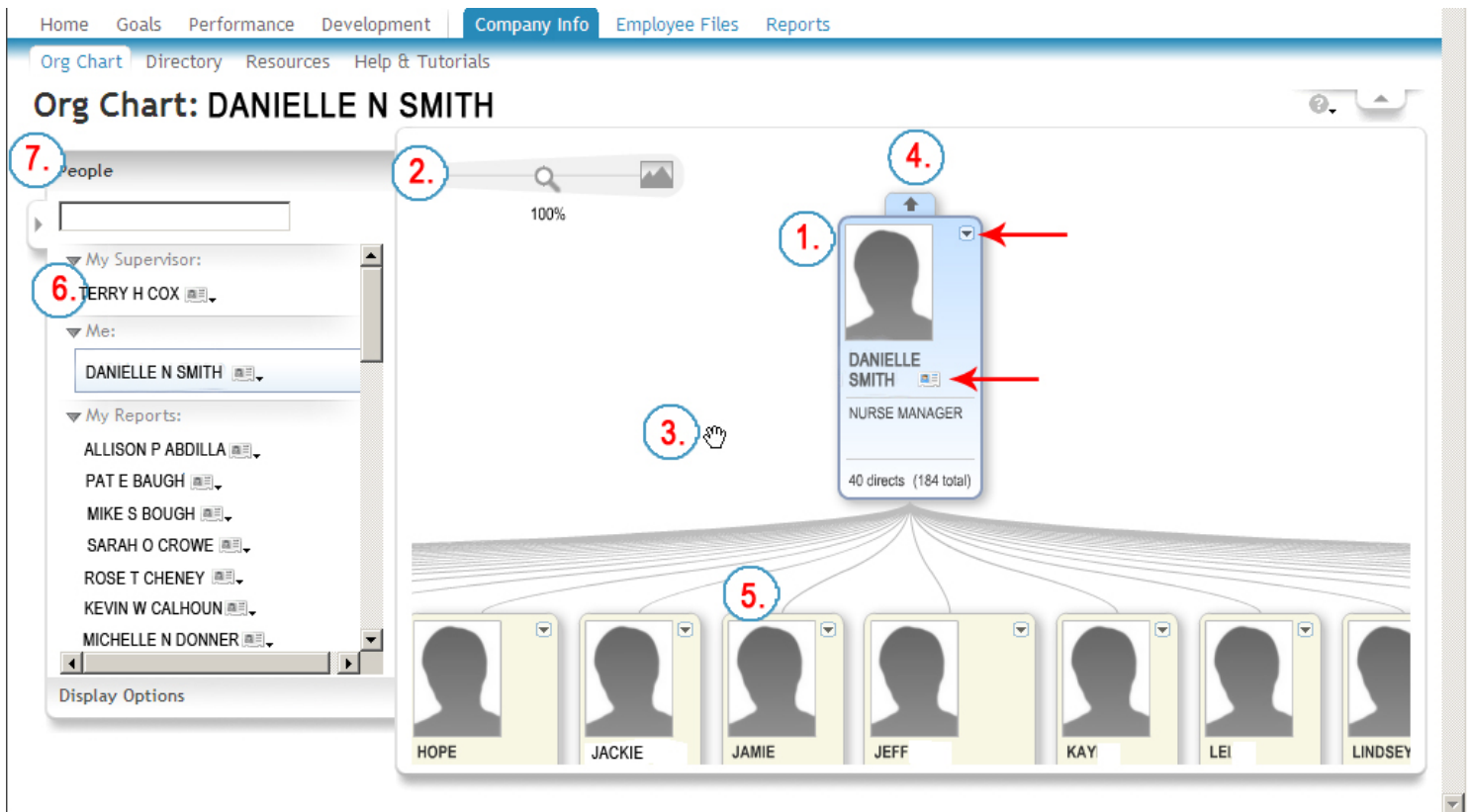
#### UAB Medicine Employees:

If you see any discrepancies in your reporting structure, please email changes to your Human Resources Consultant (for UAB Hospital supervisors) or SuccessFactors administrator to correct this.

#### UAB University Faculty and Staff:

If you see any discrepancies in your reporting structure, please email changes to [successfactors@uab.edu](mailto:successfactors@uab.edu).

## Org Chart Features



### Org Chart features:

1. This is your employee Org Chart record. Note that it shows your title, number of direct reports and total number of employees managed by both you and your direct reports.
  - a. This arrow points to a feature that allows you to **Save Team as JPEG**, **Save Team as PDF** or **Print This Team**.
  - b. This arrow points to a feature that allows you to view more information about an employee. It includes title, department, email and access to the **Employee Profile**. You can also **Add a Note** and quickly go to other areas within SuccessFactors specific to that employee.
2. Use the slide to change the size and view of your Org Chart.
3. Anytime you see a "hand" as your cursor, you can use this to navigate the window.
4. Arrows also allow you to navigate through the Org Chart. This arrow allows you to go "up" in the organization structure. You would then access your supervisor's record.
5. In the Org Chart you will see your employee's Org Chart record. If they have direct reports (which will be noted on their record), you can click on their record to drill "down" in the organizational structure.
  - In this view, direct reports are listed alphabetically by first name.
6. This is a list form view of the Org Chart. You can navigate through the Org Chart by selecting an employee.
  - Note the Display Options at the bottom of this list. You can change your view mode from Hierarchy View to Team View.
7. The People Search window allows you to search to view the Org Chart structure from another employee's perspective. As you begin typing in the field, it will auto-populate to let you select the correct individual.

If you need additional assistance, please contact the **SuccessFactors System Administrator** for your organization.