Navigating Nakisa

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1 – Getting Started

1.1 Accessing the Application

Instructions

1. Click on the following link Nakisa Login.
2. Add the URL to the browser Favorites list (or bookmark it) for easy access later.
3. On the login page, enter your HRIS/AMS user ID and secure id Pin.
4. You will then come to the Nakisa Login Page where you will enter your HRIS/AMS user ID and password.
5. Click Log In.
1.2 User Interface Overview

Description
This document describes the default graphical user interface and feature set associated with the product. The following image shows the main parts of the application user interface.

1. **Application menu bar**: Displays the available application menu items that provide access to tasks and features.
2. **Actions menu**: Accesses the tasks you can perform on the org chart, listing, or details tab panels.
3. **Tab panels**: Provide a tabbed interface that displays help, feature, task, and detailed record information in a contained area. See Using Menus and Tab Panels, section 2.3 on next page.
4. **Global Settings toolbar**: Changes the application interface display, and provides access to the online help and application preferences.
5. **Logout button**: Exits the application and displays the log-in screen.
6. **Resizing bar**: Extends the size of a display pane in a two-pane display.
7. **Scroll widget**: Moves the org chart to any area of the display pane.
8. **Selected Items panel**: Provides the tasks you can perform on one or more records. Flag org chart boxes or select check boxes in a listing to add the selected records to this panel.
9. **Zoom panel**: Enables you to adjust the display view of the org chart.
1.3 Using Menus and Tab Panels

Description

- **Org Chart** menu enables you to display org charts using org unit or position hierarchical structures. “User Organizational Structure” is specific to your Org unit.
- **Directory** menu enables you to search for employees, positions, and Org unit listings.

![Org Chart and Directory menus](image)

1.4 Toggling and Resizing Display Panes

Description

View one tab panel at a time, or two panel side-by-side by switching between one pane and two pane display.

Instructions

To switch between two views:

- To display information in one pane, on the Global Settings toolbar,
- click
- To display information in two panes, click

1.5 Using the Details Panel

Description

The Details panel provides a graphical view of a specific record stored in the company database. It contains additional information about the record, and organizes data inside tabs that concentrate on one particular area of interest.
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**Instructions** To access the details panel:

1. Open an org chart under Hierarchies in the application menu, or search a listing to find the required record.
2. Click an org chart box or listing record.
3. Click the different tabs in the panel to view specific details about the record.

### 2 – Org Charts

#### 2.1 Viewing Org Charts

**Description** Organizational charts (org charts) graphically show the hierarchical authority, roles and responsibilities, and relationships in an organization.

- Position displays the lateral relationship between positions on the same hierarchical level.
- Org Unit Displays the org unit structure of the organization. Each org unit can be expanded to view the org units and/or positions it contains.

**Instructions** To view an org chart:

1. Click the appropriate item (UofT Positional Hierarchy) in the application menu bar. The org chart loads in the tab panel.
2. Use the navigation icons at the bottom of org chart boxes with subordinate records to expand / or collapse / the org chart boxes.
3. Continue to expand the org chart; when you reach the required box, click it to open the details panel.

### 2.2 Setting Org Chart Root

**Description**  Set a new org chart root to move from broad to specific hierarchy views.

**Instructions**  To set the current box as the org chart root:

1. Expand the org chart to the required box.
2. Click to start the org chart with the current box as the root.
3. Click to start the org chart one level above the current box.
4. To return to the default root, click Actions menu > Default Root.
2.3 Changing Org Chart Views

**Description**  
Org chart views change the information displayed in the org chart boxes. Org charts that have more than one hierarchy provide different views for each organizational object included in the org chart. It can include additional information such as e-mail links or phone numbers.

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Displays the incumbent name and position title.</td>
</tr>
<tr>
<td>Detailed</td>
<td>Displays the incumbent name, position title, phone and e-mail address</td>
</tr>
<tr>
<td>Classification</td>
<td>Displays the incumbent name, position personnel sub area and classification</td>
</tr>
</tbody>
</table>
2.4 Changing Org Chart Styles

**Description**  Different options are available that change the positioning and appearance of the org chart. Vertical and Horizontal diagrams are available in extended, condensed, or compressed formats.

<table>
<thead>
<tr>
<th>Org Chart Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combined</td>
<td>Displays a compressed horizontal org chart with nodes displayed in regular format.</td>
</tr>
<tr>
<td>Compressed</td>
<td>Displays a compressed horizontal org chart with child nodes displayed in the condensed format.</td>
</tr>
<tr>
<td>Condensed</td>
<td>Displays a horizontal org chart with nodes displayed in the regular format.</td>
</tr>
</tbody>
</table>
2.5 Setting Zoom Level

**Description**  
Increase or decrease the size of the org chart diagram. Standard-mode org charts include the Zoom panel that lets you resize and move the org chart in the display pane.

**Instructions**  
To set the zoom level in the basic-mode org charts:

1. Move the mouse pointer to 100% in the top bar.
2. Select the zoom level.
3. Alternatively, click ⌃ or ⎇ to zoom in or zoom out by 10%.

To set the zoom level in the standard-mode org charts using the Zoom panel:

1. In the org chart tool bar, click Zoom. The zoom panel expands and remains open until you click again.
2. On the zoom panel, do one of the following to zoom the org chart in or out:
   1. Drag the slider to zoom to the required level.
   2. Click + or - in the panel to zoom in or out by 10%.
3. Click Fit to Page to fit the entire org chart in the display pane, or click Center to Page to center the org chart on the page without reverting to its original size.
4. Click Map to visualize the location of the currently displayed org chart branch in relation to the entire org chart. The red rectangle schematically identifies the current display view.
2.6 Printing Details from Org Charts

**Description**  
Print the details of one or more records represented in the org chart.

**Instructions**  
To print details from an org chart:

1. Please ensure the pop-up blocker is turned off. (see Info tips below)
2. Flag the required org chart boxes that are the same organizational type.
3. In the Selected Items panel, click Print.
4. Select “Custom” from the Drop down list for Paper.
5. Click on print. (Only prints on A4 Letter size)
6. Alternatively you can export it to PDF format and then print.

A **pop-up blocker** message appears at the top of the screen. OR the print window does not appear.

You may need to turn off the pop-up blocker. Go to the menu bar at the top of your page.

**Select 'Tools' → Select Pop-Up Blocker from the drop down. → Turn off Pop-Up Blocker**

For more information please review the [Technical Issues Guide](#).
2.7 Saving Org Charts

**Description**
Expanded org charts that are viewed repeatedly can be saved to your user profile. Use this feature if you have set up the org chart to view a specific branch of the company structure, and wish to refer to it later. Saved org charts are added in the application menu under **Saved Hierarchies**.

**Instructions**
To save an org chart:
1. Access the required org chart from the application menu bar.
2. Expand and set the org chart to the required root, style, and view.
3. Click Actions menu > Save Current Org Chart.
4. Enter the org chart name and description. Click Save.
5. The org chart is added to the application menu under Saved Hierarchies.

**Note:** The org chart settings option in the Actions menu is not available for saved org charts.

To delete a saved org chart:
1. Click your org chart under Saved Hierarchies in the application menu. The org chart for that hierarchy loads in the tab panel.
2. Click Actions menu > Delete Saved Org Chart.
3. Click Delete.
3 – ChartBook

3.1 Generating ChartBook

**Description**  Generate interactive PDF documents that show the structure of individual branches in the organization

**Instructions**  To generate a ChartBook:

1. Click an item in the application menu bar, then select the required org chart.
2. If you wish to start the ChartBook from a specific org chart box, expand the org chart to the required record, then click to set that org chart box as the root.
3. In the org chart panel, click Actions > Generate ChartBook.
4. Select the Number of levels you would like to see the (i.e. depth of the org chart.)
5. Click Generate PDF. Note: Depending on the data size and system resources, it may take up to several minutes to generate a ChartBook.
6. When the ChartBook is generated, click Open to view the file, or click Save to store it on your computer.
7. Click Open to view the file.

To print a ChartBook:

1. Open up the chart book saved on your computer and Print it or you can print it directly from the generate ChartBook screen.

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**INFO TIPS**  Getting a small pop up window and it does not print. What do I do?

Security settings on internet Explorer preventing download of the chart book. To fix this issue on Internet explorer go to:

Tools → Security → Custom Level → Scroll down to Downloads → Automatic prompting for file downloads → Enable → Click on OK → Pop up window click “yes” → Click on OK again. For further assistance please review the Technical Issues Guide.
4 – Listings

4.1 View Listing

**Description**
Listings display organization information contained in the company human resource data repository as dynamic tables, and are automatically updated when the data source changes.

<table>
<thead>
<tr>
<th>Employee / Position Listing</th>
<th>Enables users to search all positions, employees, and org units in the organization.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org Unit Listing</td>
<td></td>
</tr>
</tbody>
</table>

**Instructions**
To view a listing:
1. In the application menu bar, click Directory, then click the required listing.
2. A list of records appears in the tab panel. You can perform a basic or an advanced search.
   
**Note:** Depending on your application configuration, listings may not contain any records when accessed, and require a search to generate results.
3. Use navigation bar to browse the records.
4. To view additional information about a record in the Details panel, click the record in the listing.
4.2 Search Listing Record

**Description**  
Use search tools to locate records in the company human resource repository. You can perform a simple search based on a single or partial word, or an advanced search using a combination of variables.

**Instructions**  
To search for records:

1. Click the appropriate item in the application menu bar, and then click the required org chart. The listing tab panel opens in the interface. i.e. (Employee/Position or Org unit listing)
   
   **To perform a basic search:**
   
   a) Select the required field for the search,
   
   b) Enter a search term. The application automatically adds wildcard characters to the search parameters.
   
   c) Click Find.

2. Alternatively, perform an advanced search:
   
   a) Click Advanced Search.
   
   b) In the Advanced Search dialog box, select an operator type for a field: Contains, Begins with, Ends with, or Equals, then enter the search term.
   
   d) Click Find.

3. The search results are displayed in the listing grid.

4. Move the mouse pointer to the or icons to display a brief description of the current search filter.

5. Click the icons to clear all values and reset the search parameters.

6. Click the required record in the list to open the Details panel.
4.3 Saving Listing Search Queries

**Description**
You can save your queries to perform an identical search for records. Each time you search the database using a saved query, the application generates an updated listing of records based on the latest information stored in the database.

**Instructions**
To save a listing search query:
1. Perform a basic or advanced search, then set the listing grid as required.
2. Click Actions menu > Save Listing.
3. In the Save Listing dialog box, enter the listing name and description, then click Save.
4. The listing is added to the application menu under Saved Listings.
5. To delete the saved listing, click Directory menu, then select your listing under Saved Listings. The
7. Click Actions menu > Delete Saved Listing.
8. Click Delete. The listing is removed from the interface and the saved listings.