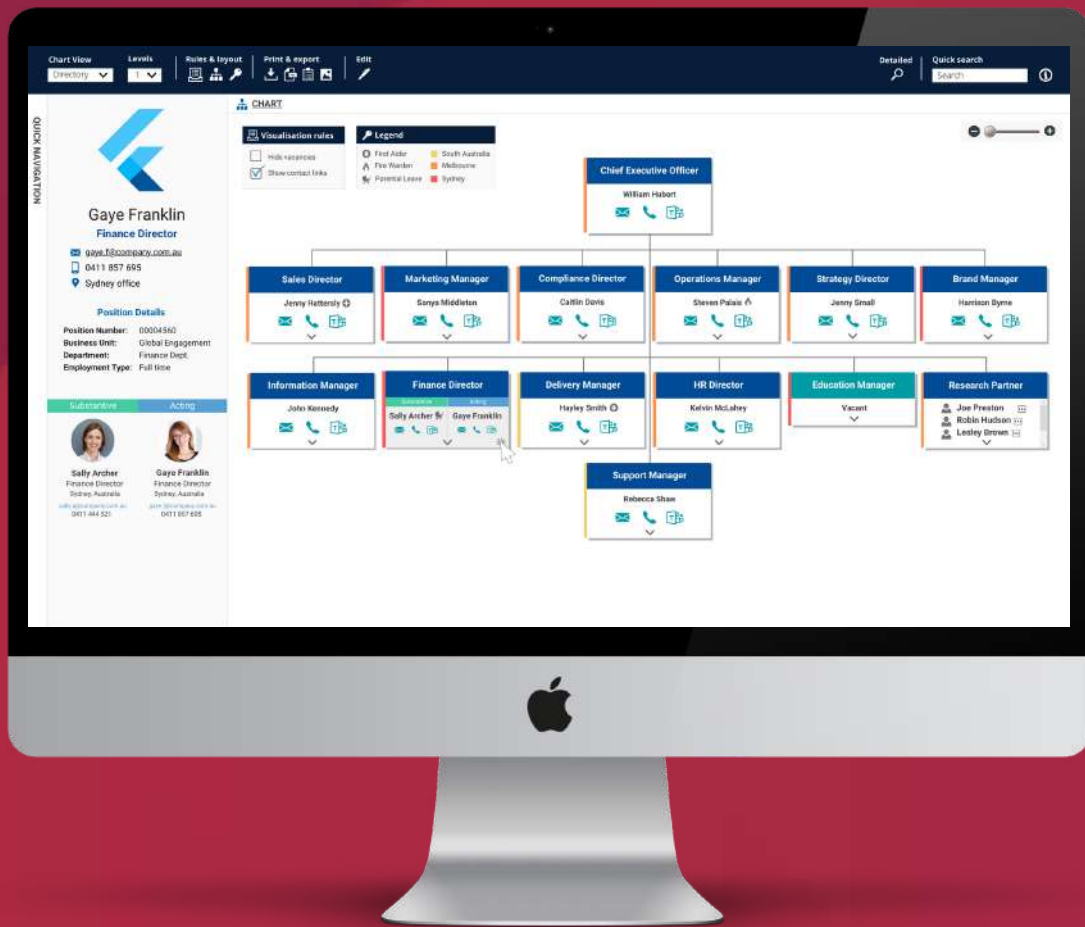


4 Big Wins of Automating Org Charts & HR Reports



1. Reduce unnecessary manual admin
2. Leverage your employee data
3. Improve visibility over your workforce
4. One click HR reports

Why use an org charting & reporting tool?

Lots of Australian organisations still rely on their HR team to manually manage org charts. And not just this - they're managing endless data requests and manually creating workforce reports in Excel.

This is fine for small businesses, but if you're dealing with 500+ employees - it quickly becomes hours of painful data admin. It's a no brainer to automate time consuming, tedious tasks - and doing this for your org charts can bring some big wins for your organisation.

So, to give you clarity around why all large organisations need a tool to automate their org charts and HR reports - here's 4 ways it'll change your day to day.

1. Reduce unnecessary manual admin

Even if you take the time to pull data, manually translate it into an org chart or HR report - by the time you've completed the work, it's probably out of date and can't be used again. As well as this, you're likely overqualified to spend your days in spreadsheets or drawing lines and boxes.

Make use of the data you have by either creating a scheduled, automatic upload or integrating your HR systems (plus other data sources) into an org charting tool. This will enable you to generate a live, accurate org chart with a click of a button, as well as give you access to a portfolio of useful HR reports.

Organisation charts display a wealth of information previously unavailable to HR, and the ease of creation means that these charts are generated every hour, day or week, instead of being manually created every few months.

More added benefits:

- The ability to effortlessly deliver up-to-date org charts as visual reports on a recurring basis
- Eliminate the need for the other departments to request information by giving them self-serve, secure access
- HR can deliver more insights into the business and its people, helping to earn their seat at the table

2. Leverage your employee data

You can't make good decisions based on old data. According to best practice - all data in workforce reports should be:

- Made instantly available
- Automated
- On demand across the organisation
- Shared securely with appropriate access protocols (so that sensitive information is always safe)

The easiest way to do this is to make sure your data is constantly being **verified, cleansed and kept up to date**. From there, you need to pull information from the current, live information – NOT a data export, not the last report you made, and certainly not last year's results.

If you're not reporting straight from your source of truth, you'll need to make sure your reporting tools are pulling data from the source of truth regularly.

Org charting tools, like **org.manager**, allow you to combine workforce data from any system into one place, visualising the information in a way that's useful across the entire organisation. Most of our org charting customers set daily data refreshes so they are making decisions based on today's information.



3. Improve visibility over your workforce

Good organisation charts allow you to see an accurate bird's eye view of your organisational structure as it operates in the real world. Even basic org charts do a great job of drawing attention to important information, driving engagement and encouraging the exploration of answers.

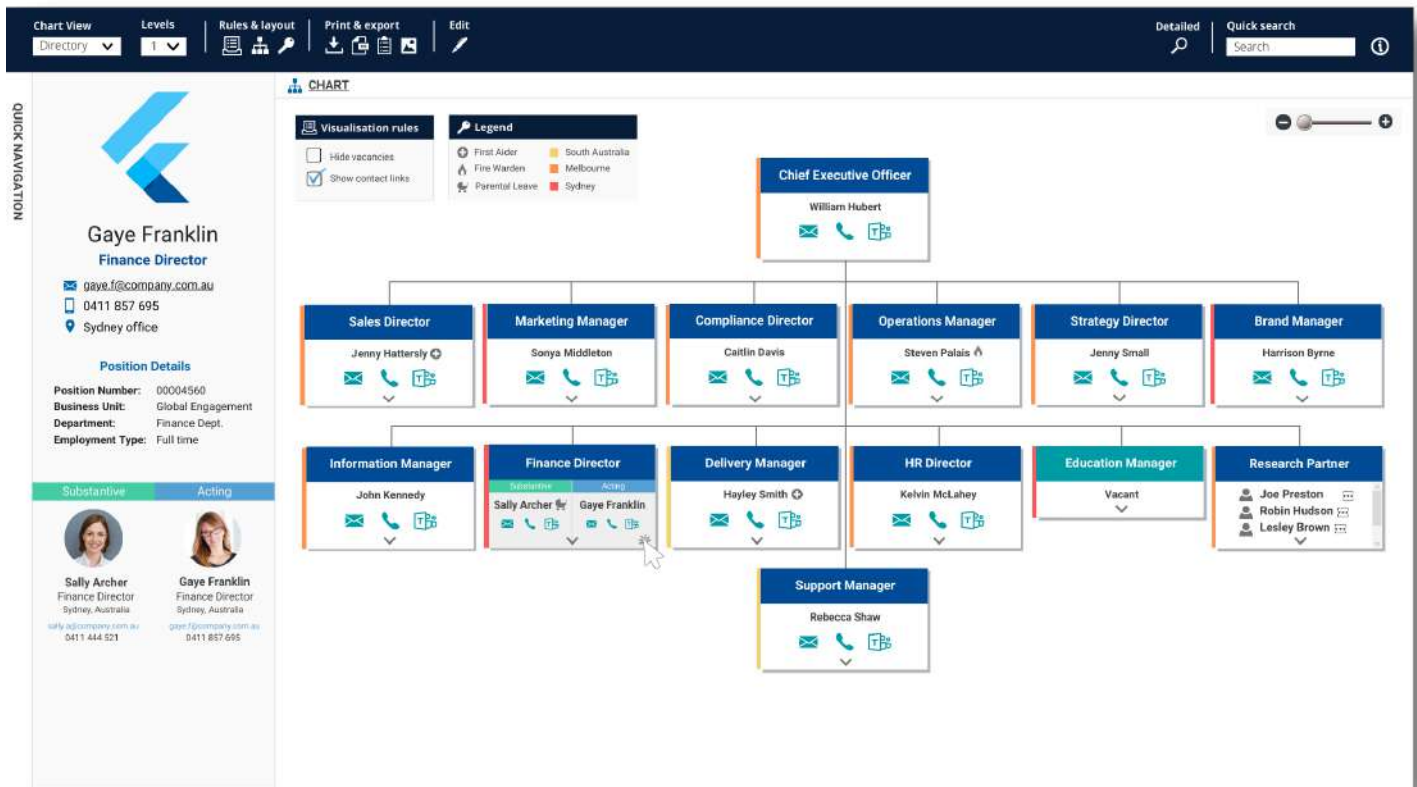
An org charting tool would enable your team to:

- Quickly navigate through all levels of your organisation, with the ability to drill down into detail
- Accurately view your dynamic workforce by visualising secondments, higher duties, acting positions
- Make better use of your data, in a whole lot of different ways - they can visualise real-time HR metrics in both simple and complex perspectives
- Emphasise visualisation, rather than reports and tables
- Use visualisation rules that allow you to highlight important HR metrics

[org.manager](#) org charts are browser based, making it easy to access and share your charts. You can make your organisation charts visible to all employees, as well as restrict access to specific data and functionalities based on role or requirement.

A corporate directory is generally the first view rolled out into an organisation. It provides all employees with a common understanding of where they fit in the hierarchy, as well as basic information about position attributes, location, contact details, photos, etc.

The chart example below automatically updates with changes made in the payroll system, plus has advanced quick search and easy chart export to PDF, image, Excel or html link.



4. One click HR reports

Managing workforce reports manually puts a huge strain on the HR & payroll team and significantly delays decision making for managers. [Research in Australia](#) indicated that most organisations are still at a very basic level of HR reporting, using manual tools such as Excel and PowerPoint.

This is fine until you're asked to source some complex HR reports under a tight deadline. If you're prepared, these reports will already be prepared too. But for 95% of us, you're either going to have to use old data or set your whole HR team to some fast data crunching to deliver on time.

Save yourself the headache and stress. Rather than manually preparing ad hoc reports over and over - automatically generate them direct from your HR systems and data sheets instead!

This way you'll have a portfolio of always up to date reports that you can securely share or export with just a click of a button.

What are some easy ways to create HR reports using org charts?

Set up visual alarms - Highlight any issues within departments, e.g. you can highlight any department that is over the set budget in **red**. That way, you can share the report to decision makers and they'll instantly know which departments are over-budget at a glance. To make it even easier - we can set this up for you.

Set up conditional formatting - Set up rules linked to check boxes or user-based permissions to show/hide information. If you have an org charting tool, you can also use advanced search or filters to surface important information.

Powerful calculation engine - Easy insights and metrics with individual and department roll up calculations based on totals, percentages, averages and lots more (this is configured by Navigo, customised to your business rules i.e. FTE).

***Hot tip:** When creating a report, be sure not to cover too much ground. Make it visually appealing and guide the viewer through the data. E.g. when preparing a budget report, make sure only budget information is shown. There's no employee contact details, no performance data – just the information requested.*

HR report examples

The readability of org charts increases the value of HR metrics. Here's a few examples of HR reports for different departments:

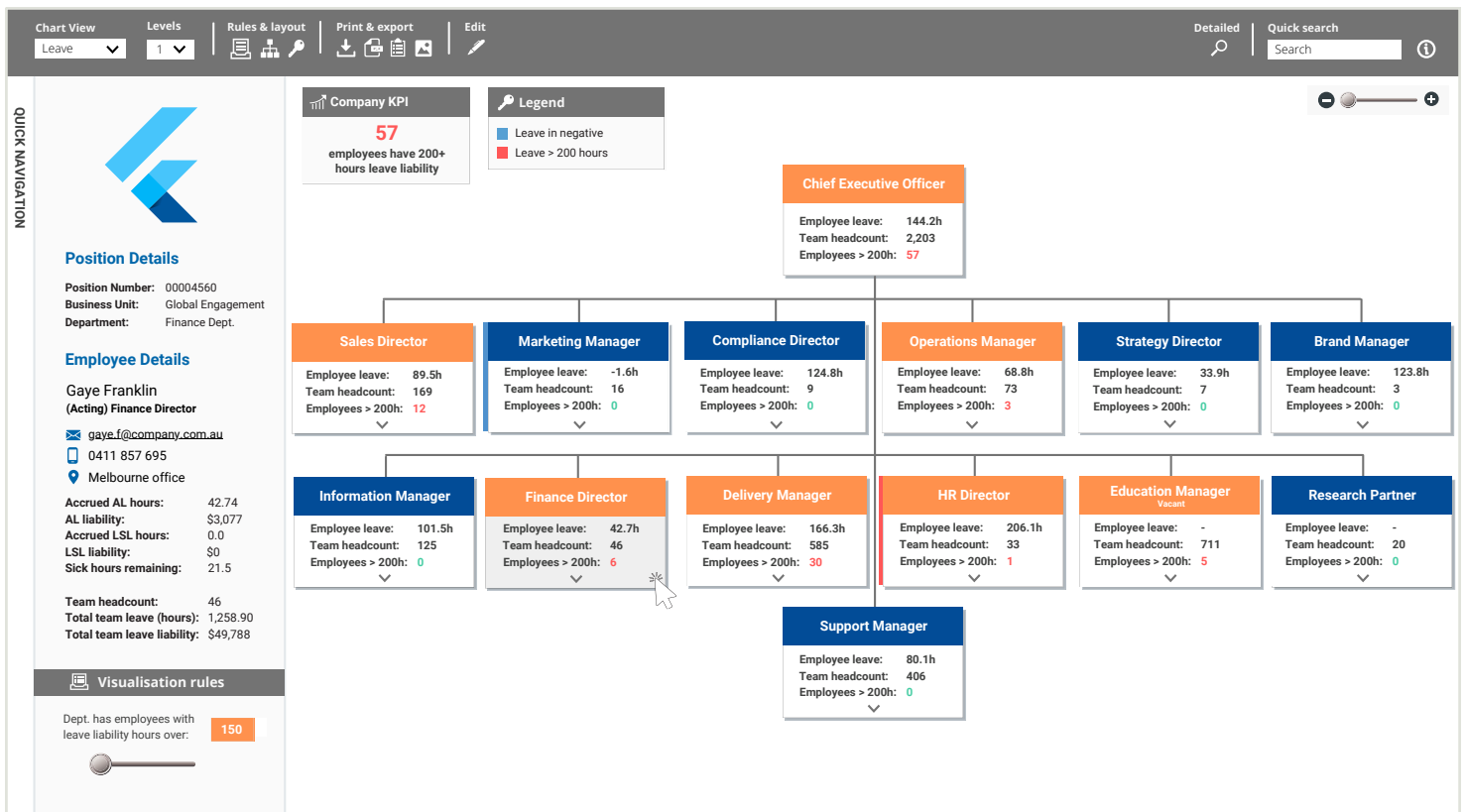
HR department

Organisation charts allow HR teams to access a more strategic view of the workforce. It enables them to:

- Quickly identify department problem areas
- Gain visibility over real-time staffing levels, including easily identifiable vacant positions, span of control, skill mapping, leave liability, etc

- Export real-time HR reports in one click
- Crowdsource ongoing data cleansing by making line managers responsible for maintaining their dataset – easily keeping data up to date. By making HR data visible to the entire organisation, staff are quick to reach out to fix errors
- Support diversity and inclusion initiatives by highlighting gender split and ratios in a diversity chart
- Improve data security - no more spreadsheets with confidential employee information flying around

Chart example: Leave liability

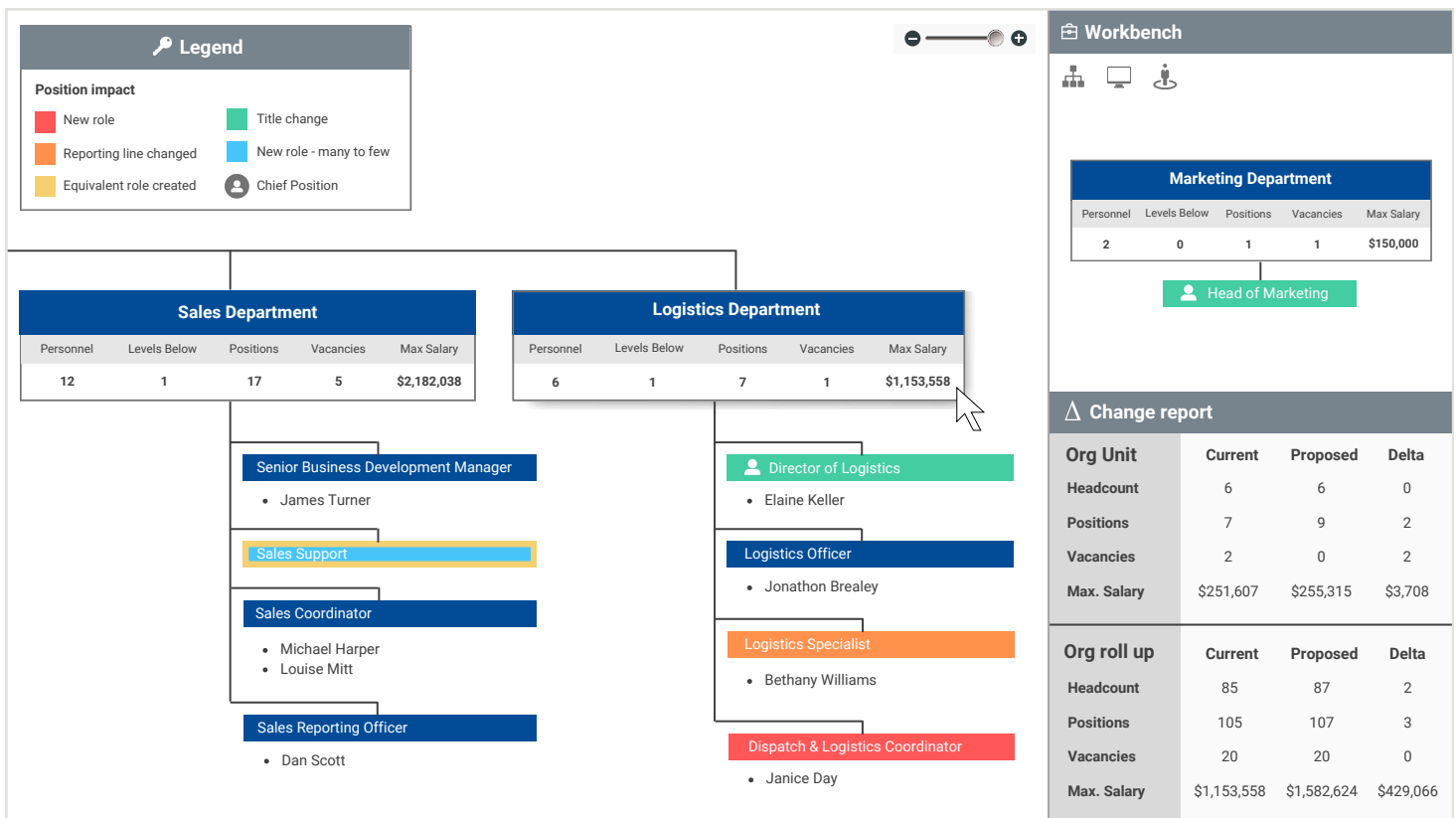


Org change team

Whether you're dealing with a complete restructure, replacing an executive or managing a merger, using an org charting tool will significantly streamline the process. Design advanced, real-time workforce modelling with features including:

- Create a full copy of your workforce data for drag and drop modelling
- Sandbox workbench to temporarily store org units, positions or people
- Change summary that shows the real-time impacts of your current vs proposed structure
- Visualisation rules to highlight or categorise changes
- Split screen to view 2 different structures side by side - drag-and-drop from one screen into another
- Access an audit log of all changes for easy write back (or automatic MDF writeback for SuccessFactors)
- Every position, employee and department retains its underlying payroll data

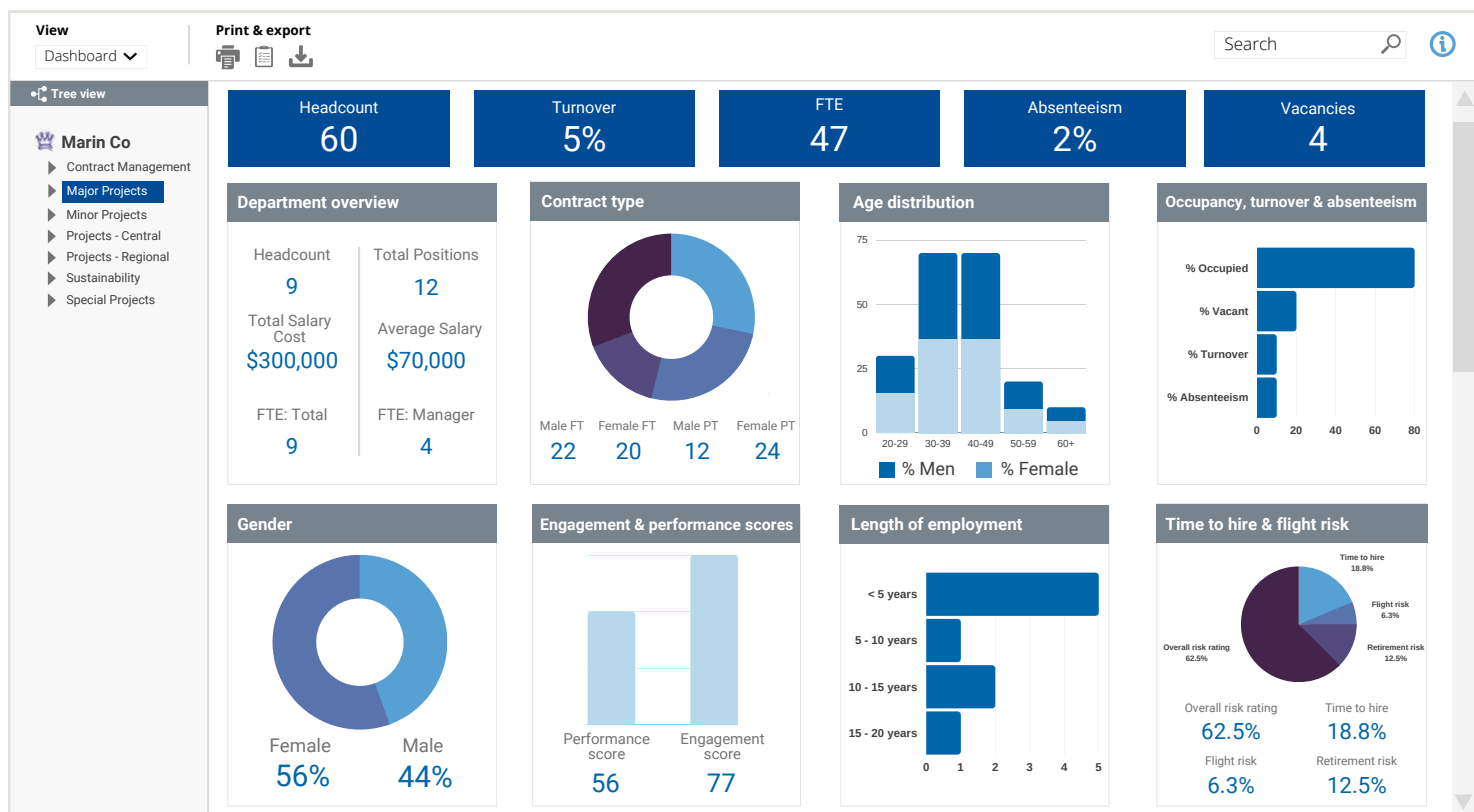
Chart example: Simulation



Management / Finance

Increase transparency over HR metrics, compliance and KPIs in easy to understand dashboard views. Give leaders in your organisation secure access to the analytics that are relevant to them with role-based permissions, ensuring that everyone is reporting from the same pool of data.

Chart example: Management dashboard



Some other useful workforce reports that are easy to create in org charts include:

- Employment status
- Substantive & acting positions
- Span of control
- Budget
- Salary
- Diversity - Gender, Age, Generation & Ethnicity
- Succession planning

Building a business case

If you're ready to showcase the idea of an org charting tool internally, you need to explain how the solution will change your organisation for the better. Help your team understand the contingency costs – what happens if the company doesn't do this, what are the costs?

If you want more information on how you can build a business case for an org charting tool internally, download our free template:

[Download template](#)

Australian organisation charts: Case study

The people & culture team at a well-established Australian utility company recently completed a process optimisation review of their HR Technology. When they realised hours could be saved every week by automating their organisation charts, the [business case](#) pretty much wrote itself.

Before exploring a solution, they managed their org charts and HR reports manually using PowerPoint. Navigo was selected as the vendor because of the track record of successful implementations, agile working style and [org.manager's](#) chart design flexibility.

Real-time org charts had a positive impact across the entire business, the key users being HR, payroll, managers, finance and all employees.

"The Navigo team was extremely efficient and easy to work with. We found that org.manager was really good value considering the impact it has had on our organisation. Compared to other solutions, it's priced very well."

HR Digital Systems & Business Insights Manager, People & Capability

[Click here](#) for the full story.

See automated org charting in action

We can show you exactly how automating your org charts and HR reports could work for you. Learn about our flagship org charting and org design platform org.manager by [booking in a demo](#) today. Key features include:

- On-Prem or Azure Hosted in Australia
- Single Sign On via your Active Directory
- Security & administration setup
- Active Directory integration
- Charting complex relationships
- All charts are configured during implementation to meet customer requirements using the data, objects and relationships available



[Book a demo](#)

Otherwise, if you'd like quick access to easy-to-use org charts - download the orginio [14-day free trial](#). The key data columns you'll need to get started are: Employee name, Position Number, Position Number Report To. From there, you can include any other employee record data you store.