

Organization Charts

supportcenter.nc4.com/hc/en-us/articles/218424047-Organization-Charts

The organization chart allows individuals to identify their position in the Personal Profile by choosing from a pre-established list at the time of login. It will also allow the system to display a checklist of duties and responsibilities associated with each position when they login and when used provide the user access to ONLY those menu items defined in the assigned Position Based Menu.

If you plan to use the E Team Position Based Menus, it is recommended you configure any [custom roles and groups](#) and generate your [Position Based Menus](#) prior to creating your organization structure within E Team.

Please reference the emergency management organization charts used by your organization (based on the Incident Command System, or Emergency Support Functions in accordance with the Federal Response Plan, or NIMS). You will need information on your organization's hierarchical structure, positions, and a checklist of the duties and responsibilities associated with each position. Any and all positions logging onto E Team will need to be included in the organization chart(s). This information is normally found in an agency's Operations Center Standard Operating Procedures. Please also gather your non-emergency organization charts if you would like to include these in the system for daily use incidents as well.

The Organization Builder

The Organization Builder enables you to build and display your hierarchical organizational structure online, based on the structure of your organization and the skill sets of your personnel.

Within this organization, you can create hierarchical levels, define the individual positions within each level, and include contact information and department or position checklists for each level or position.

You will use two distinct forms to create your organization:

- Organization Chart
- Organizational Element

Once you have defined your organization using the Organization Chart form you can:

- Add positions and a checklist for each using the Organizational Element form.
- View your organization hierarchically.
- Staff your organization using the Staffing form.

To add positions and checklists to your organization, access the Organizational Element form by clicking on the Add A Position button while the Organization Chart is in read mode.

It is important to remember that once you add a position and click on submit to save and close the document your top level organization chart WILL NO LONGER be visible. You will now be viewing the Organizational Element document you just created. To add another top-level position to the organization, you must locate the organization in a view containing Organization Charts, open it in read mode and use the Add A Position button contained on this form.

To ensure you are adding positions in a hierarchical fashion, be sure to always verify that you have accessed the correct Organizational Element document before proceeding.

Creating Your Organization

To create an organization chart a user must be a member of either the E Team System Admin or E Team Managers group, or have been given the privilege organization_chart (EDITOR).

1. Log into the E Team application.
2. Go to References > Organization Chart.
3. Click *Create*.
4. Enter your top level organization data:
 - Organization Name: Enter your Organization Name
 - Contact Info: When applicable provide key contact information for this organization. Include name, phone number(s), etc.).
 - Comments: Enter any other information that may be important to those adding positions to or staffing this organization.
5. Click *Submit* when done. The document will be saved and remain on your screen in read-only mode.
6. Click the *Add a Position* option. The document will refresh. You will see your Organization Name at the top and be presented with additional fields to begin entering your 2nd organization level.
7. Enter 2nd level data:
 - Position Name: Enter name.
 - Menu Template: Select the *Position Menu Template* assigned to users selecting this position when login into E Team.
The value entered here will automatically be assigned to all positions created beneath it. Once each position has been saved, changes to the assigned PBM must be done on a position-by-position basis.

- Comments/Contact Info: Enter any information that could be important to someone staffing this position along with key contact information that relates directly to this position. Could include supervisor's name, phone number(s), etc.).
- Check List: Enter a checklist of tasks that should be followed by the individual assigned to this position each time they log into E Team (i.e., check for new incident reports, log all requests made in last 24 hours etc.).

8. Click *Submit* when done. The document will be saved and remain on your screen in read-only mode. The document will be saved and remain on your screen in read-only mode.

You are now in a position to enter a 3rd level by clicking the Add a Position option which now displays beneath your 2nd level. If you wish to add an additional 2nd level to your main organization you must first click on the link to the Organization name at the top of this window. Be sure that with each new position added to this organization you check the "Name" text directly above the Add a Position option.