

# **OrgPublisher Using a Succession Planning Chart**



## **OrgPublisher 10 Training**

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## 1 Creating and Editing a Succession Planning Chart

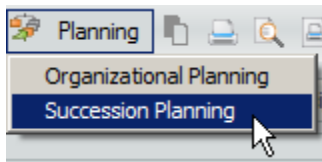
When the chart is published, the viewer will see one of the following button options based on the chart administrator's selection.

Organizational Planning - What if Planning only is available

Succession Planning - Succession Planning only is available

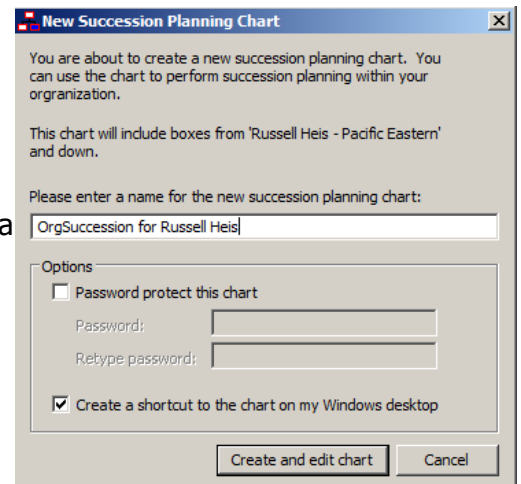
Planning - What If and Succession Planning available

If only Succession Planning is available, the user will be taken to the Succession Planning window. If both options are available, the user will be prompted to select what type of planning chart they wish to create.



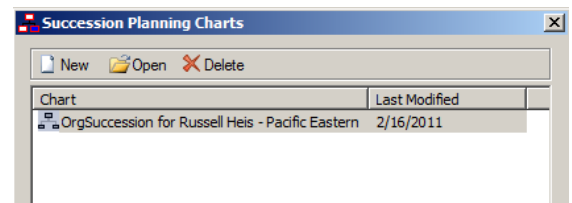
If there are no existing Succession Planning Charts, the New Succession Planning Chart window is opened. These are the same options available from the Organizational Planning chart creation window.

1. Provide a name for the planning chart.
2. Options:
  - a. **Password** – Planner is required to supply a password if the chart administrator selected this on a previous publishing definition screen. The user may also choose to set a password.
  - b. **Restrict planning chart size** – Planner may limit the number of levels available within the planning chart.
  - c. **Create a shortcut** – Planner may have a shortcut available on his/her desktop to the planning chart.



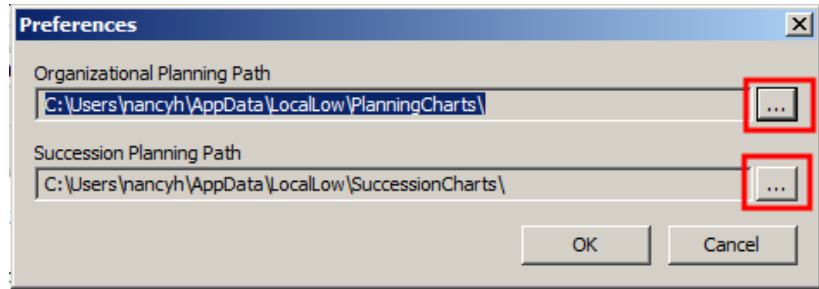
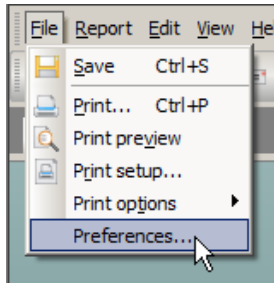
If there are existing Succession Planning Charts, the Succession Planning Charts management window opens. From this window:

- Select a chart in the list and then click Open or Delete.
- Click New to return to the New Succession Planning Chart window.



## 1.1 Succession Chart Storage Location

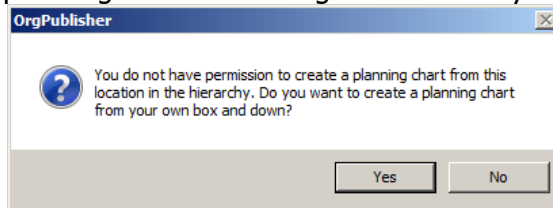
Within an open Succession chart, the user can click on File and then Preferences to select where to store the succession planning chart.



## 1.2 EChart - Secured Planning Chart

The chart administrator may limit planning to a specific span of control or to your own span of control. When this has been applied you will see the following if you attempt to create a planning chart outside of your span of control.

1. If your chart box is not the current top of chart, you will be prompted to produce a planning chart containing boxes within your span of control. Select Yes.



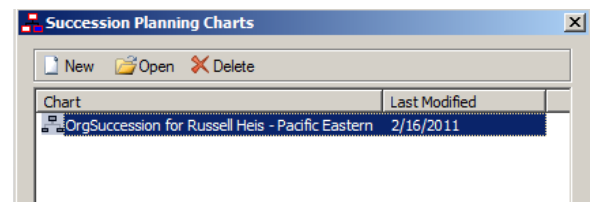
2. If your chart box is the current top of chart, you are taken to the Create New Planning Chart Dialog Box.
3. Some planning chart users may be given the option to plan from any span of control. In this case, the current top of chart box will be the span of control included in the planning chart.

## 1.3 PluginX

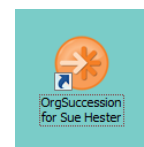
The current top of chart box will be the span of control included in the planning chart.

## 1.4 Return to a Planning Chart

1. Return to the published chart on your intranet.
2. Select Succession Planning.
3. Select the planning chart.
4. Click open.

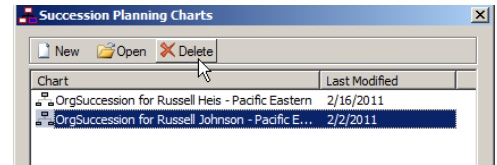


OR, if a shortcut was added to your desktop when the planning chart was created, double click on the shortcut.



## 1.5 Delete a Planning Chart

1. Return to the published chart on your intranet.
2. Select Succession Planning.
3. Select the chart you wish to delete.
4. Click the Delete button.
5. You will be prompted to confirm you want to delete the chart.
6. If a shortcut was added to your desktop you will be prompted to delete the shortcut as well.
7. You will be notified that the deletion has completed.



## 2 Views Toolbar

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The chart administrator defines the look and feel for each of these views. Click the button to display the view. Click a second time to turn the view off. If the view is displayed, the button will be outlined. The Views toolbar from left to right:

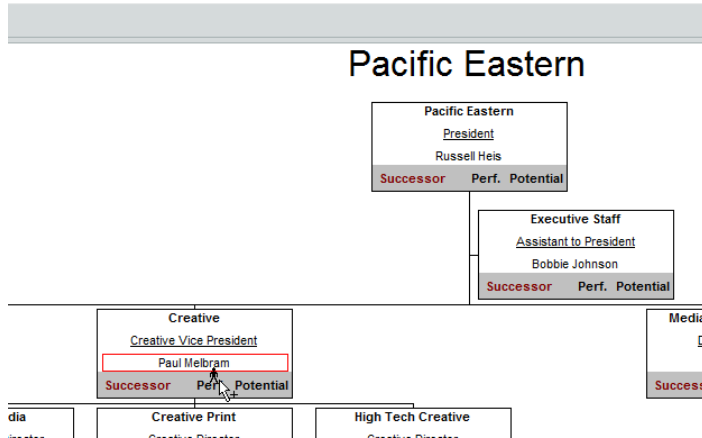


1. **Style View** – List of styles available in the chart. You can click to select the style you prefer to see.
2. **Tree View** – Displays the hierarchy in an outline format.
3. **List View** – Displays data for the chart records in a spreadsheet layout.
  - a) A second pane is the Search View window. This offers search functionality and displays results in a spreadsheet layout.
4. **Profile View** – Displays additional data about an individual.
5. **Summary View** – Displays counts and summaries of numeric fields.
  - a) A second tab – Graphs – displays graphs generated from the Summary View data.
6. **9 Box View** – Displays individuals as they fall within a 9 Box configuration.

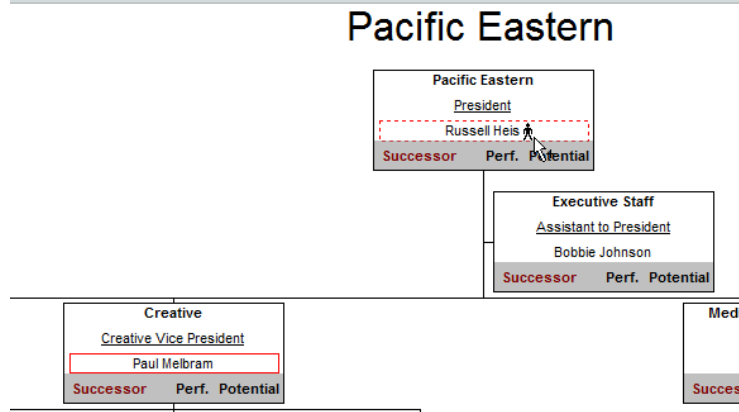
### 3 Creating a Successor in a Succession Chart

The easiest method for creating a successor in a succession chart is to use drag and drop.

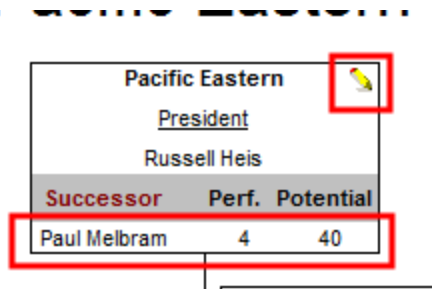
1. Place the mouse pointer on the person's name who will become a successor. Hold the left mouse button down to select. The individual's name is outlined with a solid red line.



2. Continue to hold the left mouse button down and drag the person's name to the position where they are a successor. You will see the mouse pointer has a person attached while moving. When the mouse is on top of the current position holder's name (you will see a dotted red outline around the name), release the mouse button.

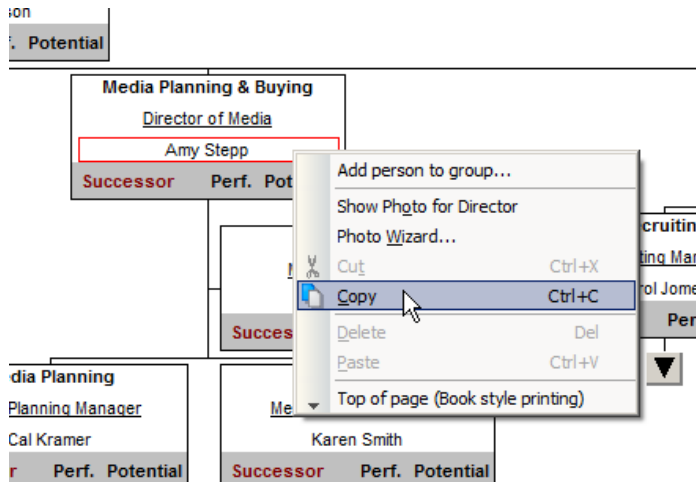


3. You will see the successor's name appear below the current position holder and you will see a change icon appear in the top right of the chart box.

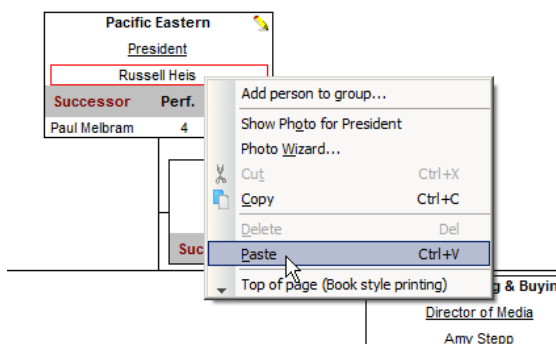


A second option is to copy and paste a successor into the correct location within the succession chart. This method is helpful when you are placing someone in a box that is outside of the chart viewing area.

1. Place your mouse pointer on the person who will become a successor.
2. Right click and select Copy.



3. Locate the box containing the current holder of the position by:
  - a. Searching for the person's name and clicking to navigate to the person
  - b. Drilling to the person
  - c. Scrolling
4. Place the mouse pointer on the person's name and right click.
5. Select Paste.



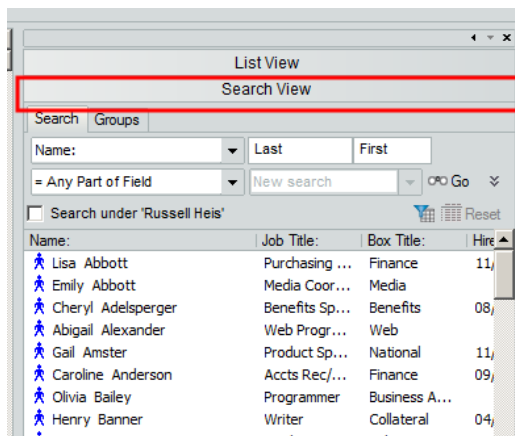
6. The copied record is now a successor.

Pacific Eastern		
<u>President</u>		
Russell Heis		
Successor	Perf.	Potential
Amy Stepp	4	40
Paul Melbram	4	40

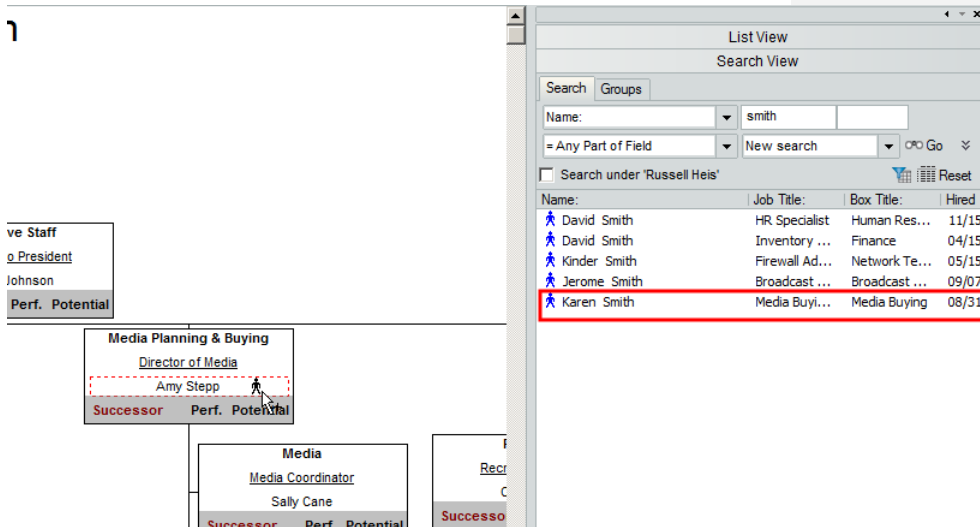
### 3.1.1 Using Search View to Create a Successor

Another easy method for adding successors is to locate the successor in the Search View Pane in the List View window or by using the Search button. Once the person is located, they can be dragged to the box containing the current holder of the position.

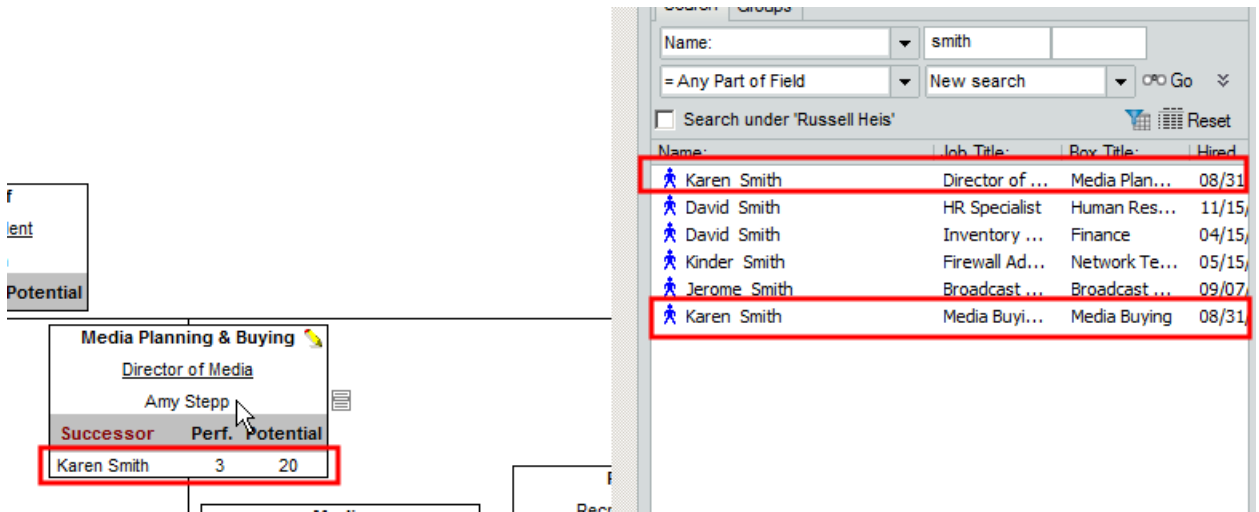
1. Locate the box containing the current holder of the position.
2. Open the List View and activate the Search View (if necessary).



3. Search to locate the successor.
4. Place the mouse pointer on the search result for the successor.
5. Hold the left mouse button down and drag to the box containing the current holder of the position.

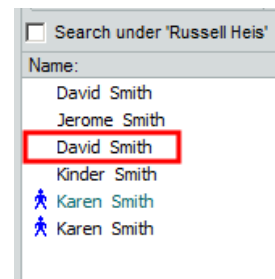


- Release the mouse button.
- The successor has been added to the chart box and the person (Olivia Bailey) now appears twice in the Search View. The red entry indicates the successor position she holds in the chart.

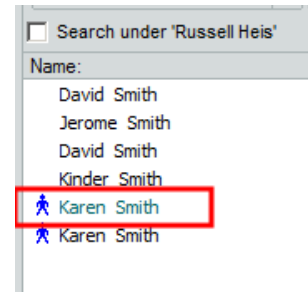


The Search List display indicates the status of the listing, as noted below.

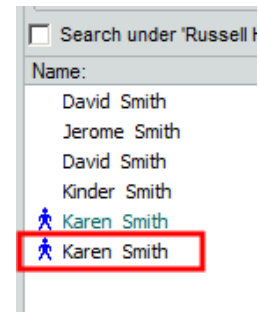
If the planner restricted the planning chart size and there are people on lower levels in the organization, these records will appear in the List View. Drag and drop can be used to place them in the chart as a successor. Clicking on the name does not navigate the chart since the person is not "charted" in the planning chart.



If the chart administrator formats the name for the successor position with a color other than black, the name will use the format color when displayed in the list. This will distinguish entries for successor records. The icon to the left of the name indicates that this person is charted. Drag and drop can be used to place them in the chart in a second successor position. Clicking on the name does allow you to navigate within the chart.



A person who is charted in a non-successor position will display in the list. The icon to the left of the name indicates that this person is charted. Drag and drop can be used to place them in the chart in a successor position. Clicking on the name does allow you to navigate within the chart.

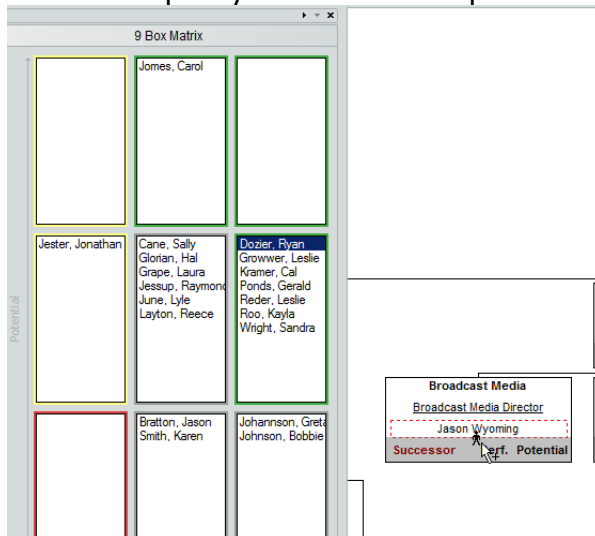


### 3.1.2 Using 9 Box Results to Create a Successor

If a 9 Box has been formatted and displayed in the organization chart, you can drag and drop individuals from the 9 Box into successor positions. If the 9 Box is not displayed, click the 9 Box button -



1. Place the mouse pointer on the person in the 9 Box display.
2. Hold the left mouse button down and drag to the person to succeed.
3. In this example Ryan Dozier will be placed in a successor position for Jason Wyoming.



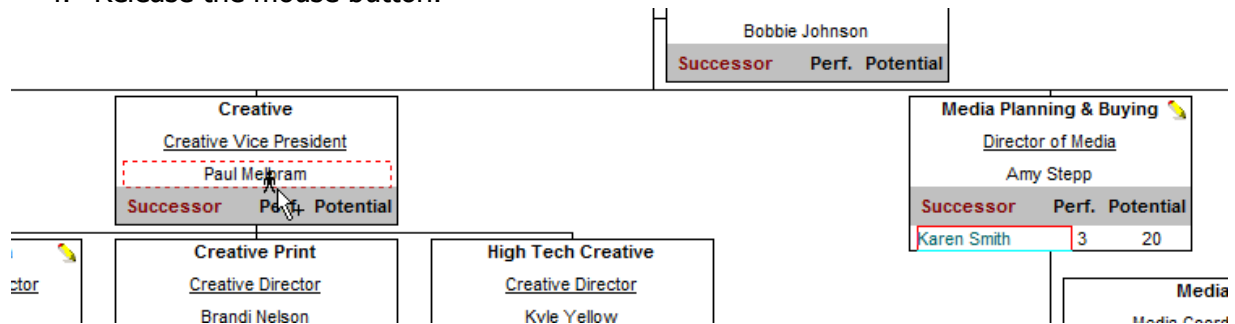
4. Release the mouse button.

**Please note:** The 9 Box View will not launch if the chart administrator has not setup formatting.

## 3.2 Moving a Successor

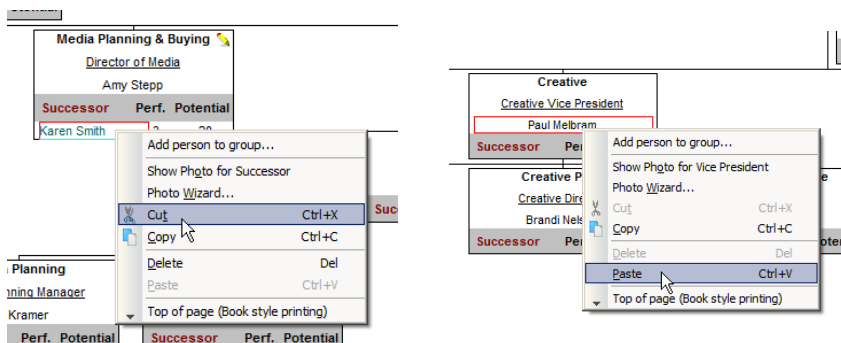
Once a successor is in the chart, you can move them to a new location with drag and drop.

1. Place the mouse pointer on the successors name.
2. Hold the left mouse button down.
3. Drag to the new location.
4. Release the mouse button.



You can also cut and paste the successor in a new location.

1. Place the mouse pointer on the successors name and right click.
2. Select Cut.
3. Place the mouse pointer on the new location and right click.
4. Select Paste.

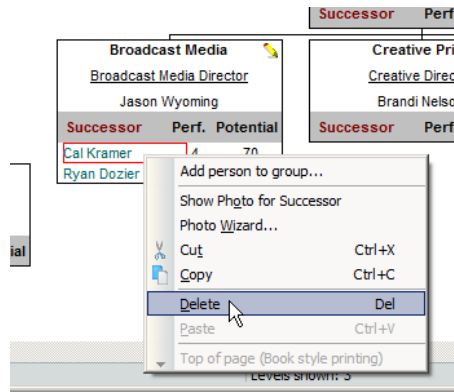


### 3.2.1 Placing a Person in a Second Successor Position

One person may be a successor to more than one position. Use the drag and drop or copy and paste methods described earlier to place a person in a second successor position.

### 3.2.2 Deleting a Successor

If you place a person in a successor role and you need to remove them, right click on the person's successor relationship and click Delete. This will only delete that occurrence of the person within the chart.



### 3.2.3 Rearranging Successors within a Chart Box

If you release the mouse button (or drop) the successor on the current holder's name, that successor appears below the current holder's name. After you have added all of the successors, you may want to re-order them to indicate who is 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup> in line for the position. This can be done as follows:

1. Place the mouse pointer over the name of the successor who should be moved in list of successors.



2. Hold the left mouse button down and drag the successor on top of the successor who should appear above the successor you are moving.

Broadcast Media		
<u>Broadcast Media Director</u>		
Jason Wyoming		
Successor	Perf.	Potential
Sandra Wright	4	40
Cal Kramer	4	70
Ryan Dozier	5	40

3. Release the left mouse button.

Broadcast Media		
<u>Broadcast Media Director</u>		
Jason Wyoming		
Successor	Perf.	Potential
Sandra Wright	4	40
Ryan Dozier	5	40
Cal Kramer	4	70

4. To move the 1<sup>st</sup> listed successor to be listed 2<sup>nd</sup> in the list, place the mouse pointer over their name.
5. Hold the left mouse button down and drag the successor on top of the 2<sup>nd</sup> successor in the list.

Broadcast Media		
<u>Broadcast Media Director</u>		
Jason Wyoming		
Successor	Perf.	Potential
Sandra Wright	4	40
Ryan Dozier	5	40
Cal Kramer	4	70

6. Release the mouse and the 1<sup>st</sup> in the list has now moved to the 2<sup>nd</sup> position.

### 3.2.4 Editing Successor Data

Any data (except the person's name) displayed in the chart box for a successor position may be edited. If the data is the source for the 9 Box Matrix, the successor's placement in the 9 Box may be affected by the data change.

1. Click once on the data to be edited.
2. Click a second time to place the cursor in the text area.

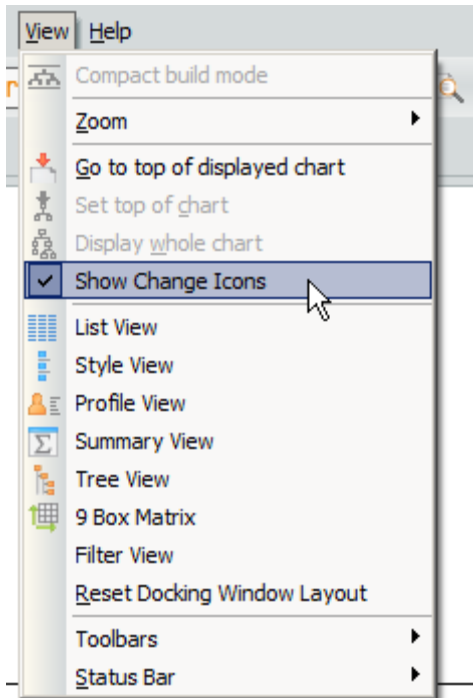
3. Select the existing text and type over with the new data.
4. Click away from the chart box to complete the data update.

Broadcast Media		
<u>Broadcast Media Director</u>		
Jason Wyoming		
Successor	Perf.	Potential
Ryan Dozier	3	80
Sandra Wright	4	40
Cal Kramer	4	70

**Please note:** If a person appears in more than once in the chart, your data update only affects this occurrence of the person. You must navigate to the other occurrences for the person and update the data for that entry.

### 3.3 Change Icon Display

The user of a Succession chart can determine if they want to have the Change Icon display in the chart box as changes are made. To remove the display of the icon, click on View. If there is a check mark beside Show Change Icons, then click the check mark. This will close the View window and remove the displayed Change Icons in the chart boxes.



### 3.4 Succession Planning Change Report

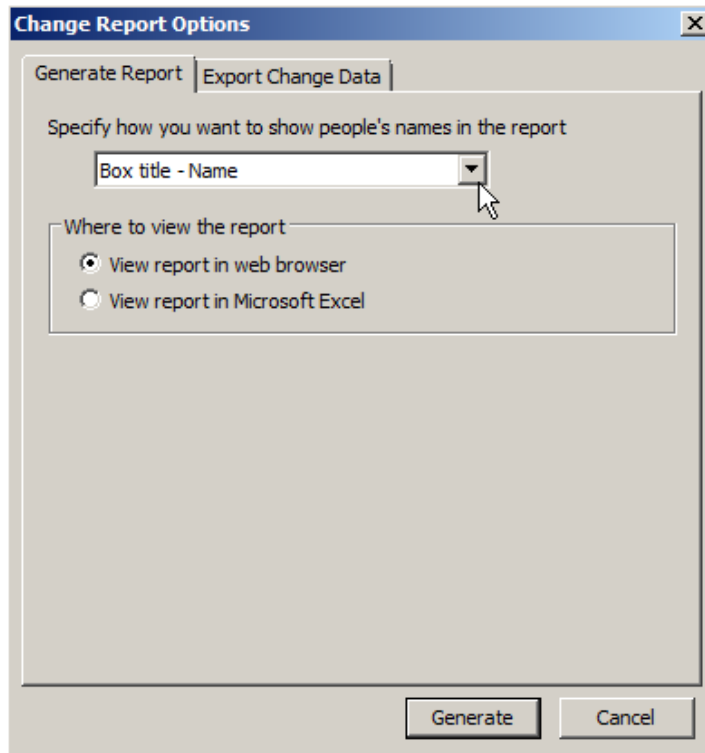
All changes you make within a Succession Planning chart are tracked. A report of the movement is available for viewing and printing.

#### 3.4.1 Modify Change Report Settings

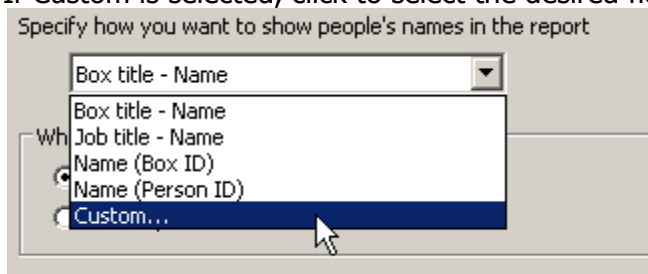
1. In the Succession planning chart, click the Generate a Change Report button to modify report.



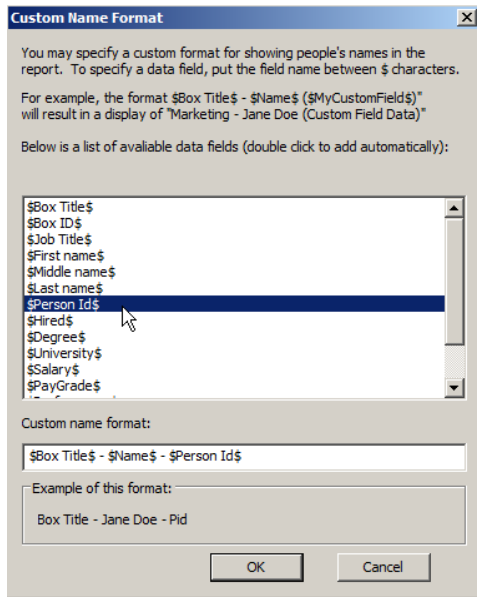
2. Click the drop down arrow to determine how you want names to display. Click to select where to view the report – Web or Microsoft Excel.



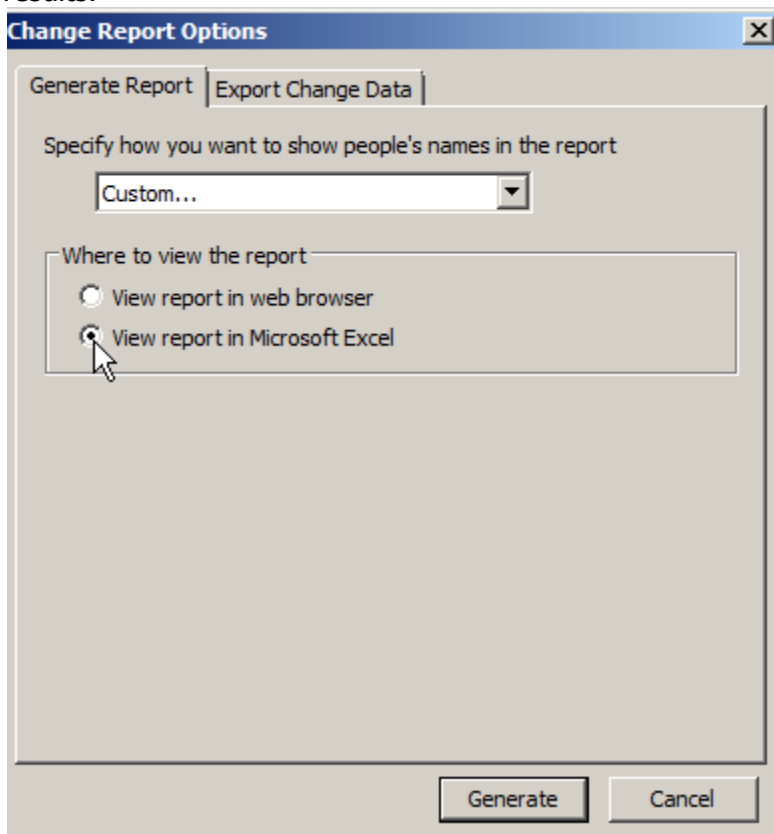
3. If Custom is selected, click to select the desired fields to display.



4. Double click on the fields you wish to add to the display. The selected fields will appear in the Custom Name Format box. An example of the format will also be displayed. Click OK when finished.



5. Select where you want to display the report, and then click Generate to see change results.



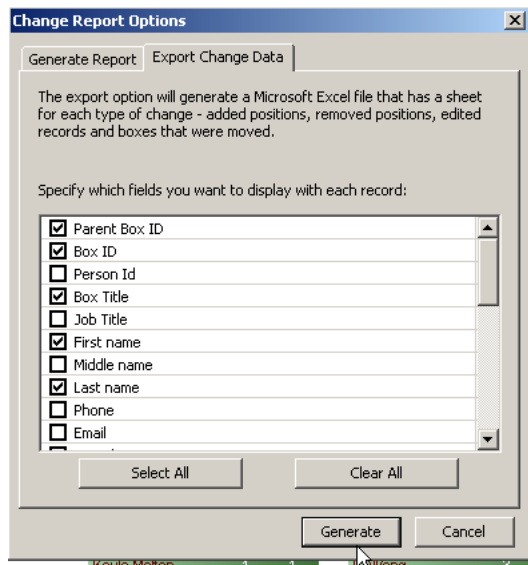
6. This reports shows 3 people were added as Successors in the chart.

A	B	C	D
<p>Changes for each position in OrgSuccession for Russell Heis 3 Levels</p> <p>The following successors were added</p> <p>Pacific Eastern - Pacific Eastern - Paul Melbram - 9822</p> <p>Broadcast Media - Broadcast Media - Ryan Dozier - 20009</p> <p>Broadcast Media - Broadcast Media - Cal Kramer - 2344</p> <p>Broadcast Media - Broadcast Media - Sandra Wright - 3111</p>			

### 3.4.2 Exporting Change Data

Many customers requested the ability to create a comma separated file reflecting changes that could be used to upload into a source HR system. OrgPublisher Premier offers this option. Select the desired fields for the report and click Generate.

**Please note:** Parent Box ID must be one of the selected fields in order to see the current and previous Parent Box ID data for a changed record.



The resulting Excel file will contain 3 tabbed worksheets:

- Added Successors – A Successor was added to a position.
- Removed Successors – Existing Successor was deleted.
- Changed Successors – Existing Successor was moved from one position to another.

	A	B	C	D	E	F	G
1	Parent Bo	Box ID	Box Title	First name	Last name		
2	3	131	Intern Pro	James	Douglas		
3	3	131	Intern Pro	Kinder	Smith		
4	3	9	Applicator	Kayla	Melton		
5	1	3	Informator	Ki	Wang		
6							
7							
8							
9							
10							
11							
12							
13							
14							
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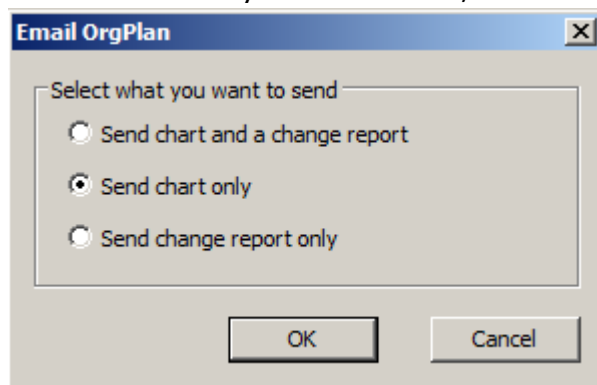
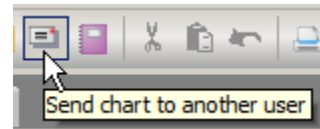
## 3.5 Distribution of Succession Planning Charts and Reports

Succession Planning Charts and change reports can be distributed by the planner. Charts can be printed, sent to PowerPoint, or sent to someone via Email. The change report can be sent to Excel and then printed or emailed to someone.

Please review the Print and PowerPoint training manual.

### 3.5.1 Sending the Chart and Change Report

1. Click the Send chart to another user button.
2. Select what items you wish to send, and then click OK.



3. The files are attached and directions on how to view them are added to the note. Type in the email address and send.

