

OrgPublisher Using an Organizational Planning Chart



OrgPublisher 10 Training

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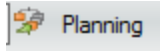
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1 Creating and Accessing an Organizational Planning Chart

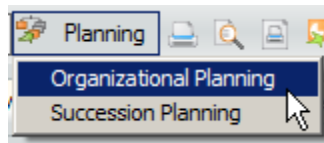
When the chart is published, the viewer will see one of the following button options based on the chart administrator's selection.

 - What if Planning only is available

 - Succession Planning only is available

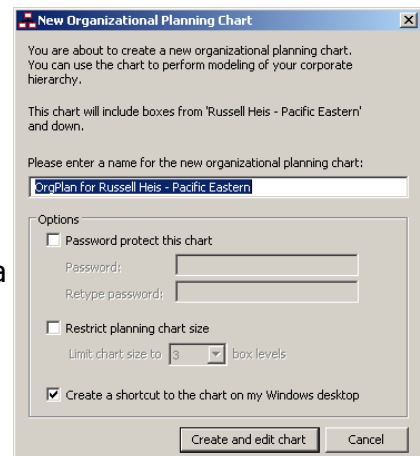
 - What If and Succession Planning available

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



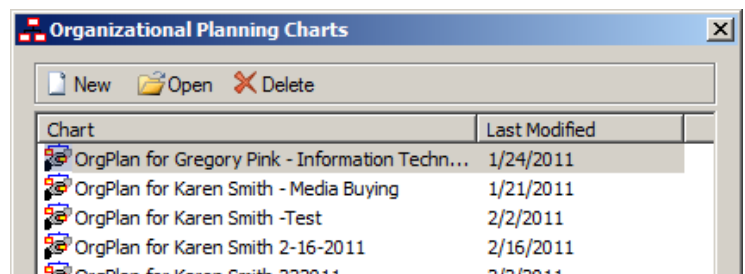
If there are no existing Organizational Planning Charts, the New Planning Chart window is opened. These are the same options available from the Organizational Planning chart creation window.

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 a planning chart exists, the user will see the list of existing charts. They can select and then delete or edit. They can also choose to create a new planning chart. To open an existing Organizational Planning Chart:

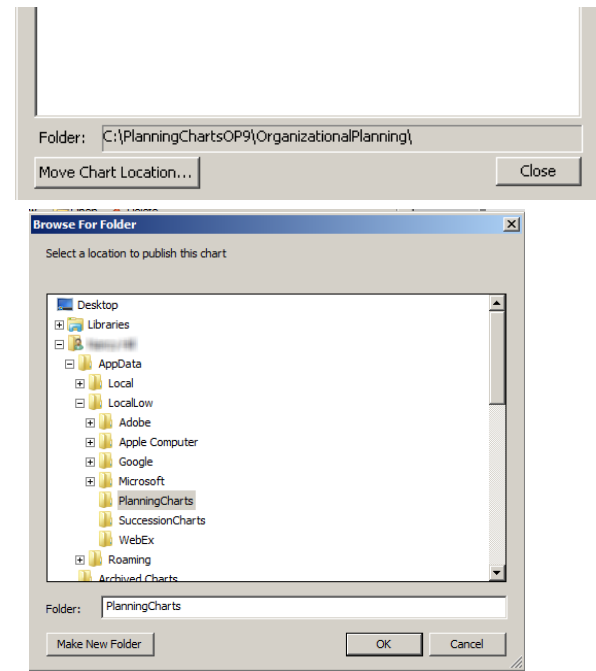
- Select a chart in the list and then click Open or Delete.
- Click New to return to the New Succession Planning Chart window.



1.1 Change the location of the Planning Chart

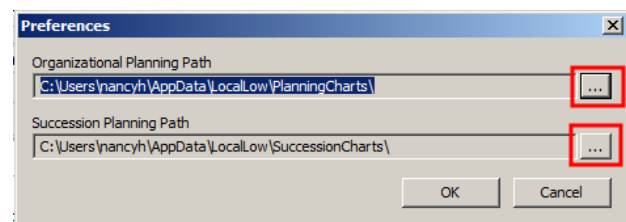
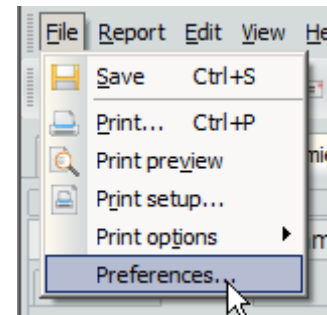
Planning charts are stored on the server (EChart only) or on your local machine. If you would like to change the location of the planning chart follow the steps below.

1. The chart administrator has defined a default storage location. It is noted at the bottom of the Organizational Planning Chart window.
2. To change the location of the planning chart, select the Move Chart Location button.
3. Browse to locate the new location.



Once you have opened the planning chart, you can modify the storage location. You will be prompted to move all existing planning charts.

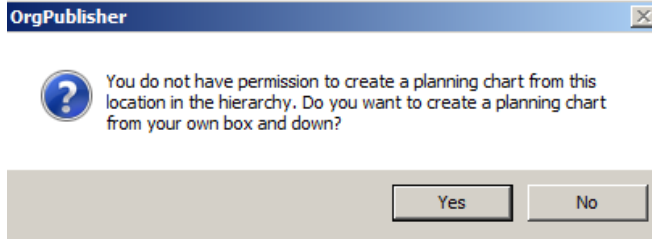
1. Click on File, then Preferences.
2. Click on the Browse button to identify the new location for your planning charts.
3. Click OK.
4. You will be prompted to move all of your planning charts to this location.
5. Click Yes to move all organizational planning charts to the new folder.



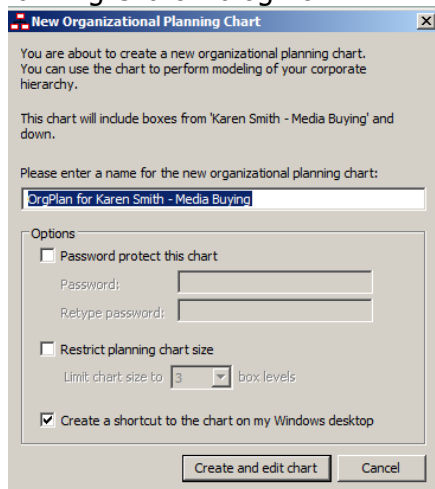
1.2 EChart - Secured Planning Chart

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 New Organizational Planning Chart Dialog Box.



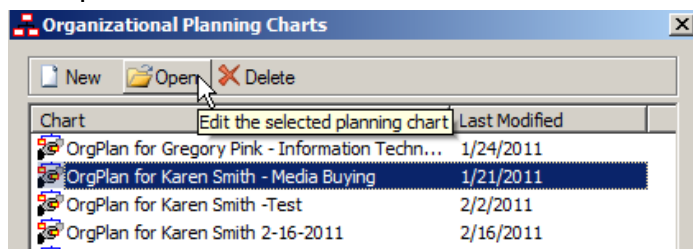
3. Some planning chart users may be given the option to plan from any span of control. In this case, the current top of chart box will be the span of control included in the planning chart.

1.3 PluginX

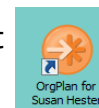
The current top of chart box will be the span of control included in the planning chart.

1.4 Return to a Planning Chart

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

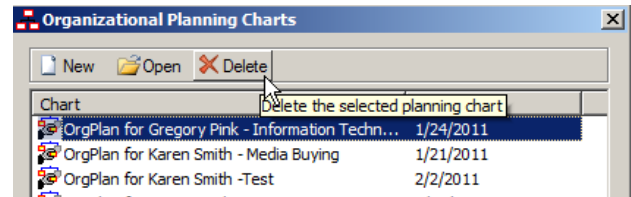


OR, if a shortcut was added to your desktop when the planning chart was created, double click on the shortcut.



1.5 Delete a Planning Chart

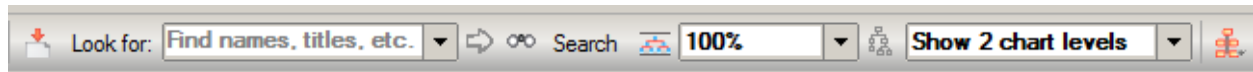
1. Return to the published chart on your intranet.
2. Select Organizational Planning.
3. Select the chart you wish to delete.
4. Click the Delete button.
5. You will be prompted to confirm you want to delete the chart.
6. If a shortcut was added to your desktop, you will be prompted to delete the shortcut,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



2 What functions do the buttons and menu items offer?

Use the viewing buttons to set up how you want to see the chart.

1. Return to and center the top of the chart: Re-centers the top box of the chart on the screen.
2. Look for: *Find names, titles, etc.*: The user can type in a value to search in any field. When the user clicks on the ⇨ button, they will navigate from box to box in the chart where the value is used.
3. Search: Brings up the Advanced Search dialog box.
4. Compact: Collapse the boxes to show only the names (easier for drag and drop structure changes).
5. Zoom the chart: Set a percentage to resize the chart.
6. Set a new top of chart: Select a box and click this button to make it the new top of chart.
7. Change the number of levels: Click to make a selection.
8. Select the layout style for this chart: Click this button and select how you want the lowest level boxes to display. The last option, Chart Layout 4 will reset the number of levels displayed to 2.



Use the editing buttons to add boxes, jobs, and people within the chart:

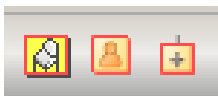
1. Insert a box containing an open position.
2. Insert a box containing a person.
3. Insert a box.
4. Inset a job.
5. Insert a person.
6. Insert an open position.
7. Insert an assistant box.
8. Insert a partner box.



2.1 Insert Function and Feedback

When insert buttons are selected, OrgPlan indicates where the insertion will occur by providing feedback. Examples of this feedback and results follow.

2.1.1 Insert Function – Direct Report

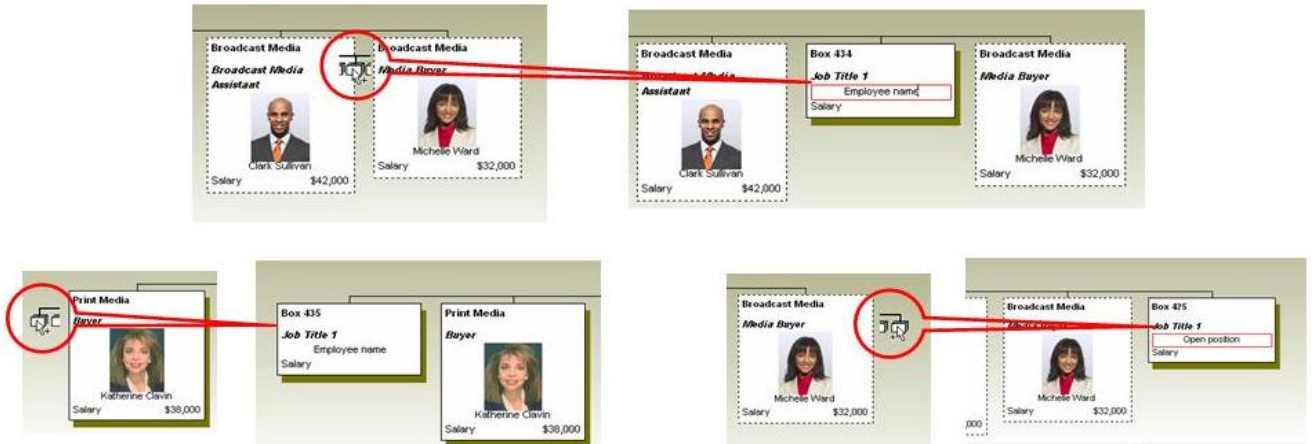


- Mouse pointer is placed on the manager/supervisor box.
- The box is outlined in Red.
- A Direct Report relationship is created.



2.1.2 Insert Function – Peer Box

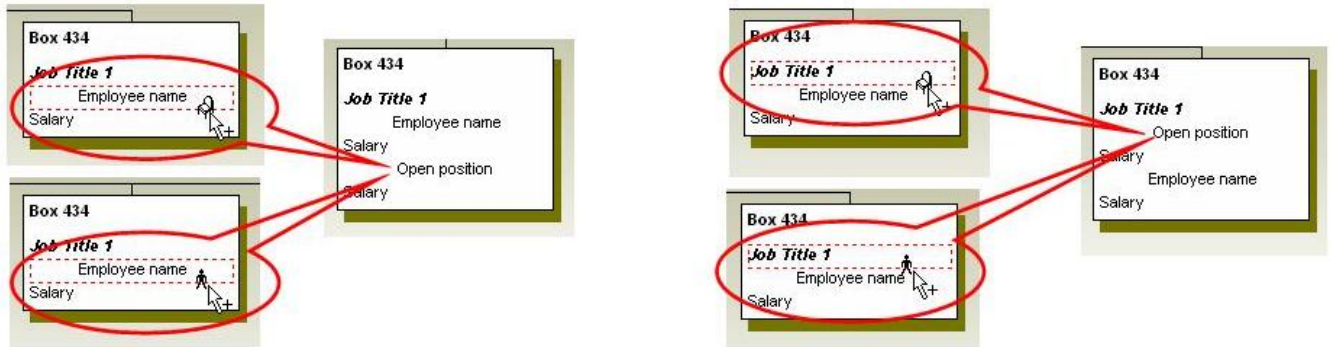
- Mouse pointer indicates the box will be placed between two boxes or to the right or left.
- A peer relationship is created.



2.1.3 Insert Function – Person and Open Position

- Mouse pointer placed on the existing name or open position in the box (when inserting a Person or Open Position) will be placed below the existing name or open position.
- Mouse pointer placed on the existing job title in the box (when inserting a Person or Open Position) will be placed above the existing name or open position holding the job.





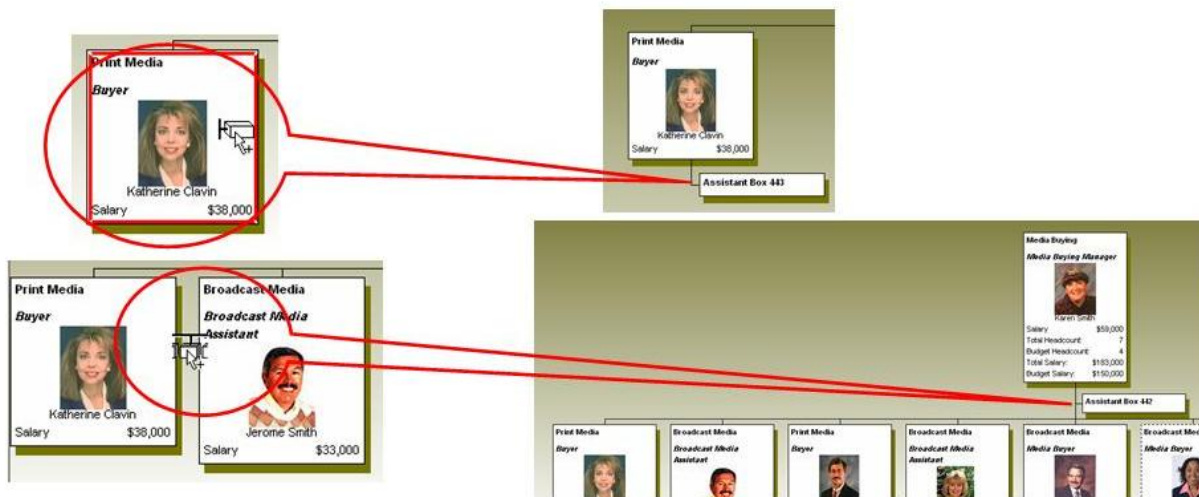
2.1.4 Insert Function – Job

- Mouse pointer placed on the existing job title in the box (when inserting a job) will be placed below the existing job title.
- Mouse pointer placed on the existing box title in the box (when inserting job) will be placed above the existing job. The new job will insert a Manager Position Type. All custom fields associated with the Manager Position Type will be displayed.



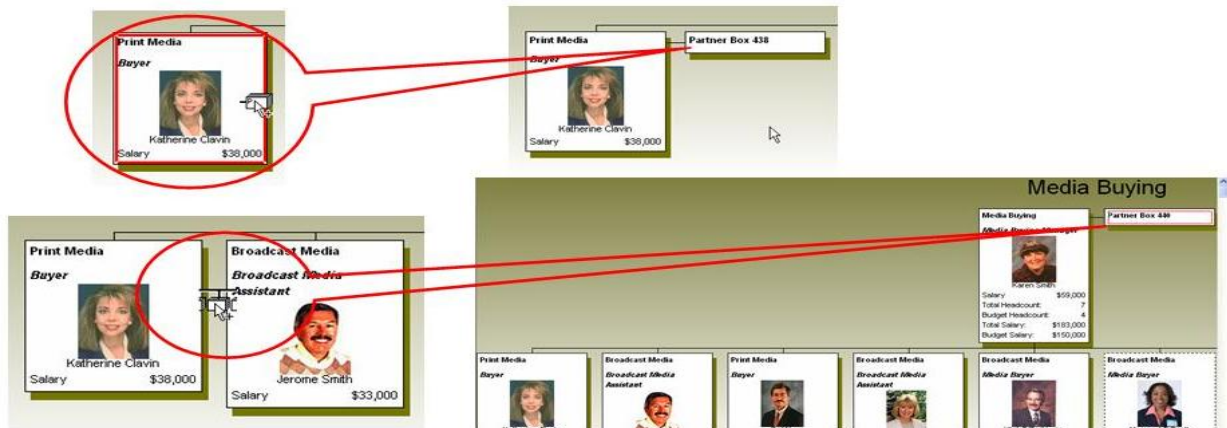
2.1.5 Insert Function – Assistant Box

- Mouse pointer placed on a box will be attached to the drop down line from that box.
- Mouse pointer placed between two boxes will be attached to the drop down line from the report to box.



2.1.6 Insert Function – Partner Box

- Mouse pointer placed on a box will be attached to that box.
- Mouse pointer placed between two boxes will be attached to the report to box.



1. When inserting a box or job, a prompt will appear.
2. Select a previously used box or job title
- OR
3. Type in a new box or job title.

3 Modifying Information in the Chart Box

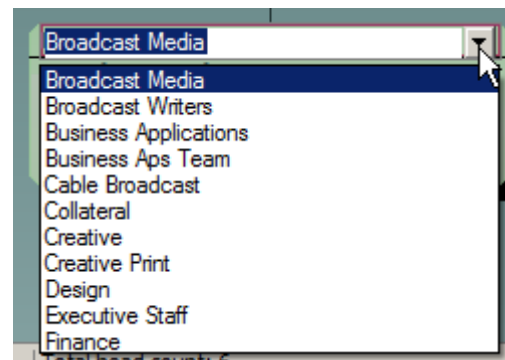
The following information answers common modifying and editing questions.

Please note: You cannot modify the name of the person holding a position.

3.1 Modify existing job and box titles

1. Double click on the data to be modified.
2. Type in the new data
OR
3. Select the drop down and then select a previously used selection.

Broadcast Media		
Broadcast Media Assistant		
Effective Date	Budgeted	Approved
	Y	Y
Jerome Smith		
Salary	Performance	Potential
\$33,000	3	N



3.2 Change the Position Type for a Person

1. You cannot modify a person's name. You can change the Position Type. Double click on the person's name.
2. Select a new Position type.

Update Person

Position type

- Manager
- Employee
- Assistant
- Contractor
- Indirect Report
- Open position
- Partner
- Staff Function
- President
- Vice President
- Director

ID: _____

OK Cancel

Broadcast Media			Print Media	
Broadcast Media Assistant			Buyer	
Effective Date	Budgeted	Approved	Effective Date	Approved
	Y	Y		Y
Jerome Smith			So Wu	
Salary	Performance	Potential	Salary	Potential
\$33,000	3	N	\$41,000	N

3.3 Modify or Insert Data

1. Double click on the existing data in the field Or
2. On the placeholder.
3. Type in the new data.

Broadcast Media		
Broadcast Media Assistant		
Effective Date	Budgeted	Approved
	Y	Y
Jerome Smith		
Salary	Performance	Potential
33000	3	N

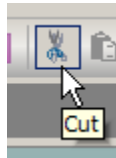
3.4 Move a Box - Cut and Paste

1. Right click on the top text displayed in the box.

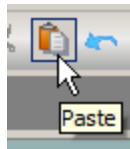
Print Media		
Buyer		
Effective Date	Budgeted	Approved
	Y	Y
Katherine Clavin		
Salary	Performance	Potential
\$38,000	4	N

Print Media		
Buyer		
Effective Date	Budgeted	Approved
	Y	Y
Katherine Clavin		
Salary	Performance	Potential
\$38,000	4	N

2. Select Cut.



3. Navigate so you can see the new supervisor/manager box.
4. Click on the Paste button.



5. Move the mouse pointer on top of the new supervisor/manager box. You will see a red outline around the edge of the box.

Broadcast Media		
Broadcast Media Assistant		
Effective Date	Budgeted	Approved
	Y	Y
Linda O Washington		
Salary	Performance	Potential
\$38,000	4	N

Broadcast Media		
Broadcast Media Assistant		
Effective Date	Budgeted	Approved
	Y	Y
Linda O Washington		
Salary	Performance	Potential
\$38,000	4	N

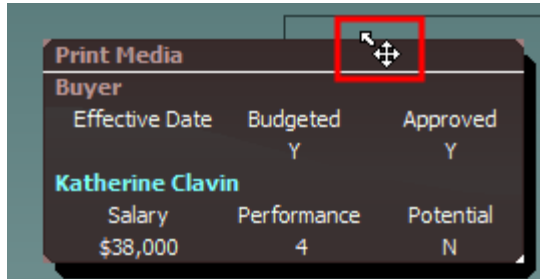
Print Media		
Buyer		
Effective Date	Budgeted	Approved
	Y	Y
Katherine Clavin		
Salary	Performance	Potential
\$38,000	4	N

In this example, Katherine Clavin, now reports to Linda Washington.

3.5 Move a Box - Drag and Drop

Drag and Drop movement can be done when the box to be moved and the new location are visible on the screen.

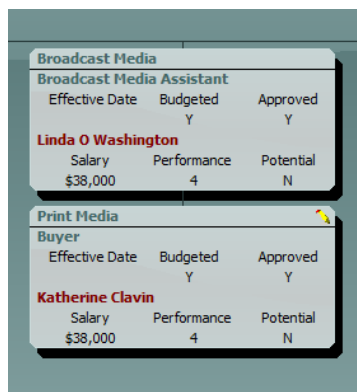
1. Place the mouse pointer on the top edge of the chart box to be moved. **Hold** the left button down **DO NOT CLICK**.



2. While continuing to hold the button down, move/drag the mouse pointer on top of the new report to box.



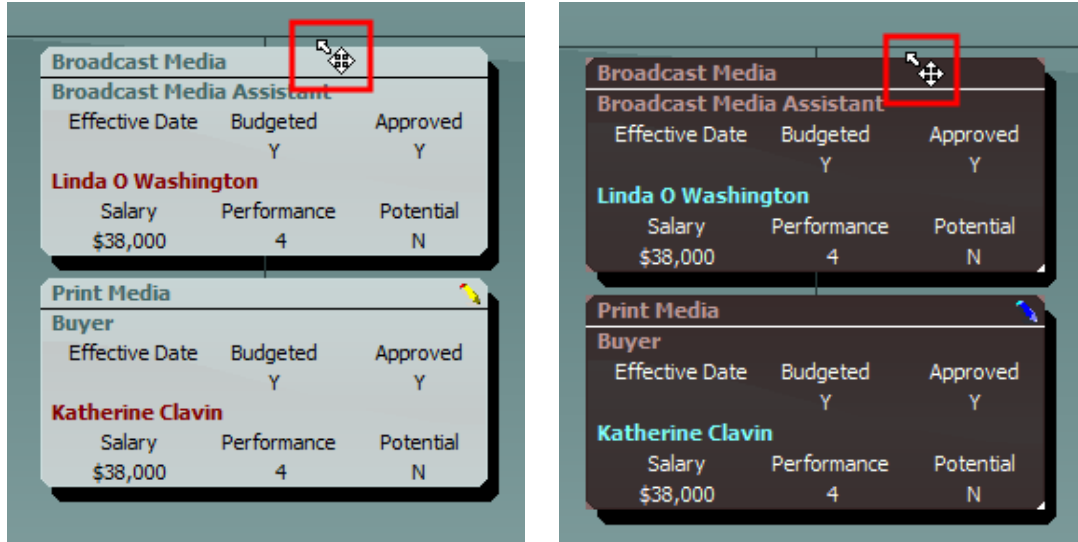
3. When you see the feedback (red outline around the new supervisor/manager box), release the left mouse button.
4. The cut box now appears below the new report to box.



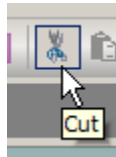
3.6 Move an Organization - Cut and Paste

1. Right click on the top edge of the top box to be moved.

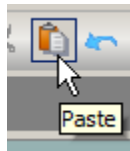
Please Note: The box and all direct report boxes are selected.



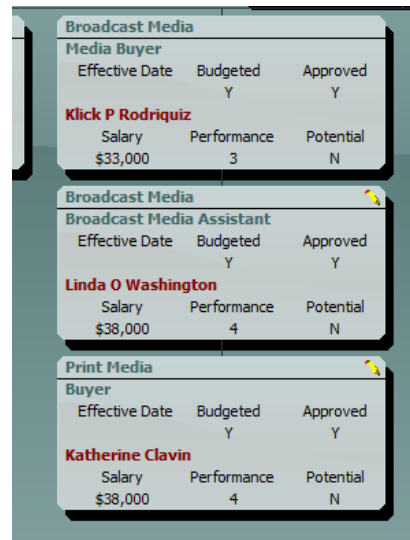
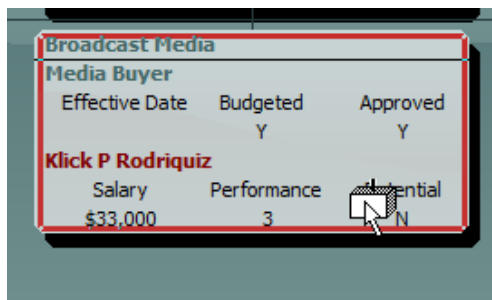
2. Select Cut.



3. Navigate so you can see the new supervisor/manager box.
4. Click on the Paste button.



5. Move the mouse pointer on top of the new supervisor/manager box. You will see a red outline around the edge of the box.



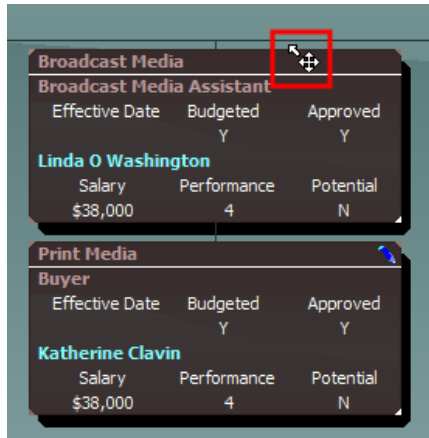
In this example, Linda Washington's organization now reports to Klick Rodriquez.

3.7 Move and Organization - Drag and Drop

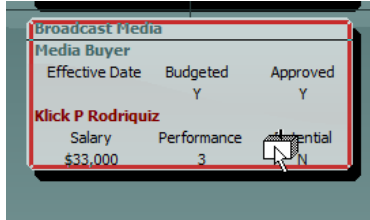
Drag and Drop movement can be done when the box to be moved and the new location are visible on the screen.

1. Place the mouse pointer on the top edge of the chart box to be moved. **Hold** the left button down DO NOT CLICK.

Please Note: The box and all direct report boxes are selected.

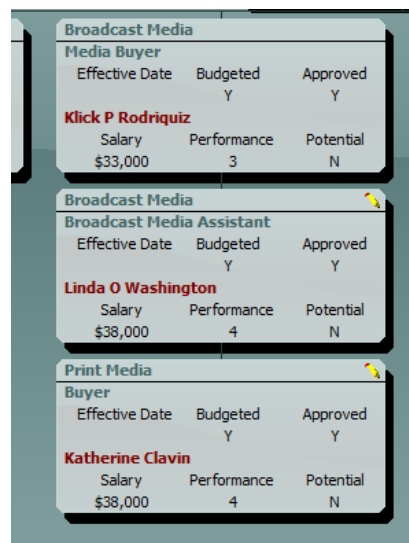


2. While continuing to hold the button down, move/drag the mouse pointer on top of the new report to box. You will see a red outline around the edge of the box.



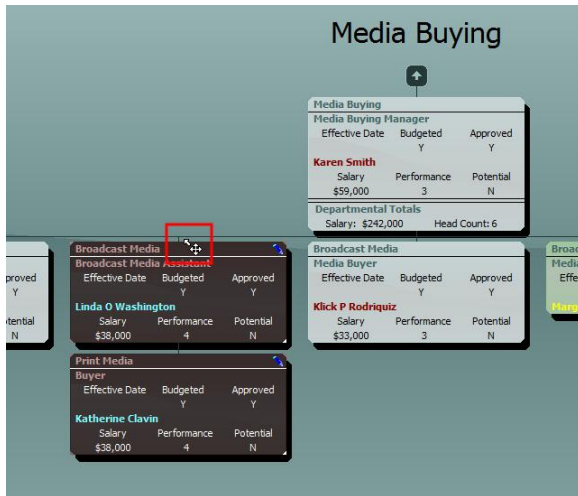
3. Release the mouse button.

In this example, Linda Washington's organization now reports to Klick Rodriquez.

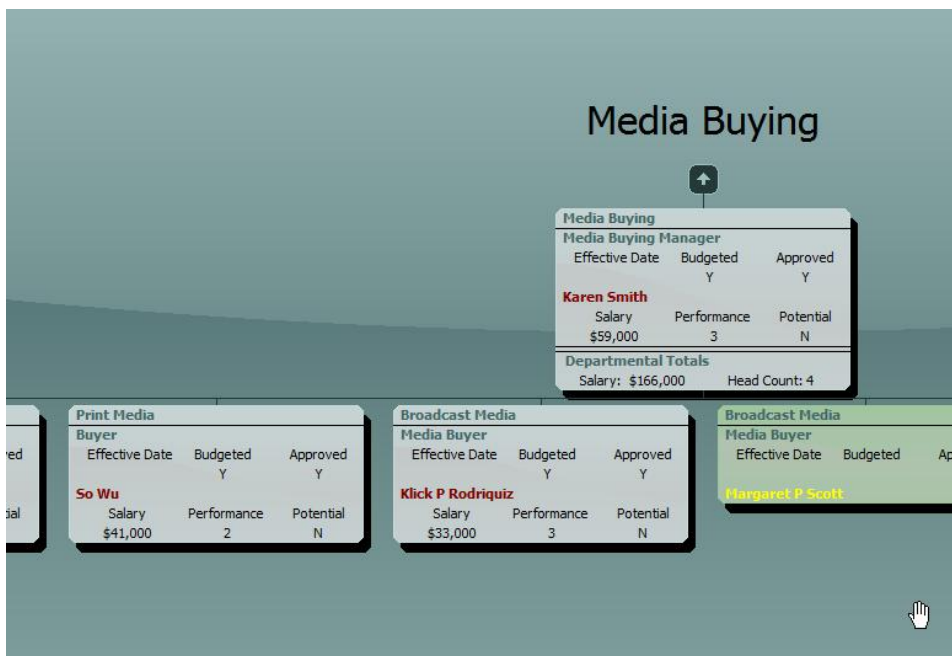


3.8 Delete a Box or an Organization

You may need to delete a box or an organization from the planning chart. To do so, select the box to be removed OR select the top box of the organization to be removed.



Press the Delete key on your keyboard to remove the Box or the organization.

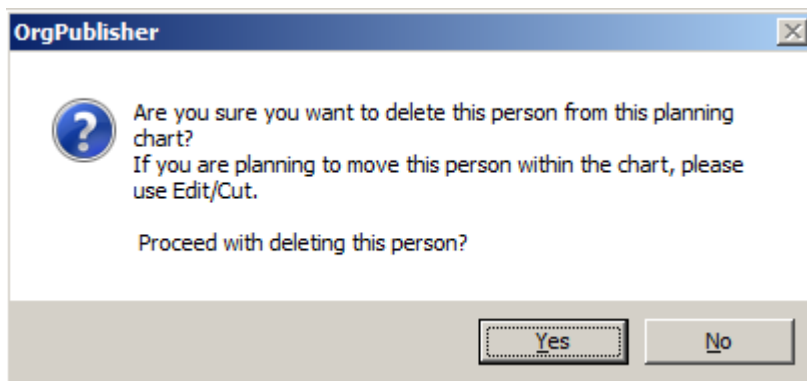


3.9 Delete a Person

You may need to delete a person from a box in the planning chart. To do so, place the mouse pointer on the person's name and click to select the name. A red outline will appear around the name.

Print Media					
Buyer					
Effective Date	Budgeted	Approved	Salary	Performance	Potential
	Y	Y	\$38,000	4	N
Katherine Clavin					

Press the delete key on the keyboard. You will be prompted to confirm the deletion. Click Yes to confirm.



The person's name and personal data are removed from the chart box. This is now considered to be an Open Position.

Print Media					
Buyer					
Effective Date	Budgeted	Approved	Salary	Performance	Potential
	Y	Y			
Open position					
Salary					

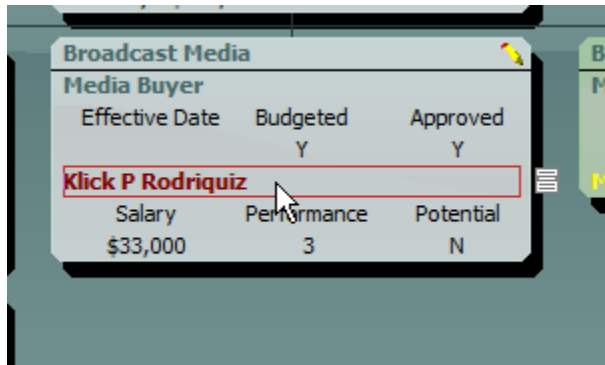
3.10 Move a Person to a Different Position

If you need to move a person from one position to another, it is typically to an Open Position within the organization chart. This can be done with drag and drop or cut and paste.

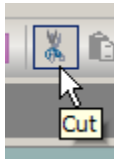
3.10.1 Move a Person to an Open Position – Cut and Paste

1. Locate the person you wish to move.

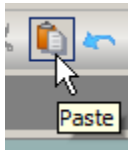
2. Click to select the person's name.



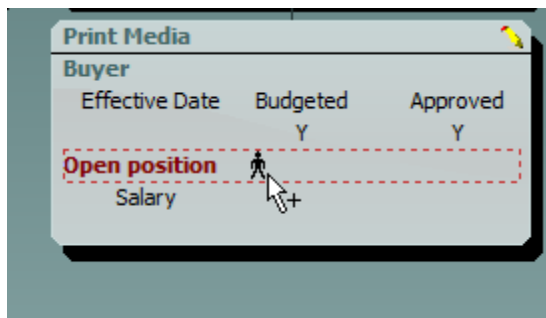
3. Select Cut.



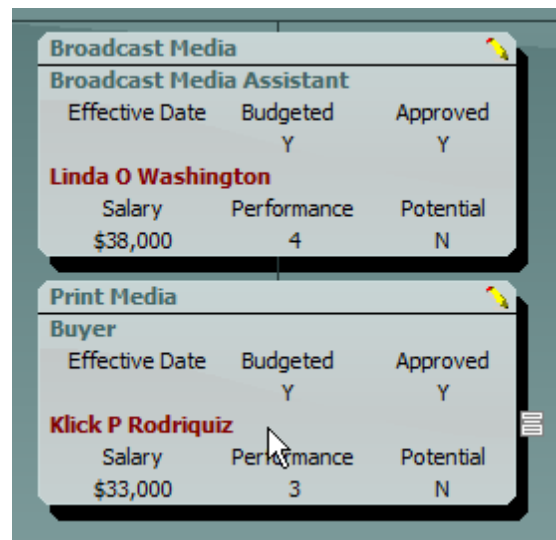
4. Navigate so you can see the new position.
5. Click on the Paste button.



6. Move the mouse pointer on top of the Open Position Text and Click. You will see a red dashed outline around the edge of the text – Open Position.

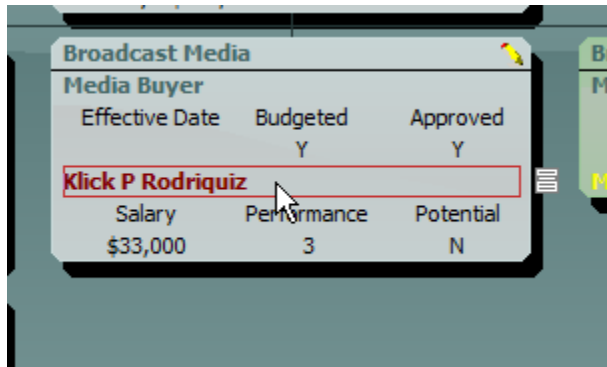


Klick Rodriquiz is now in the Open Position.

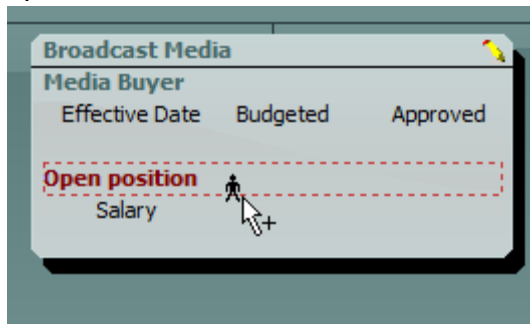


3.10.2 Move a Person to an Open Position – Drag and Drop

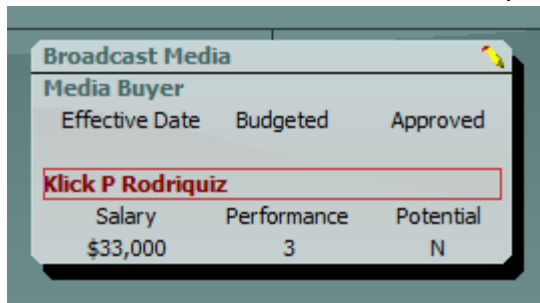
1. Locate the person you wish to move.
2. Place the mouse pointer on the person's name. **Hold** the left button down DO NOT CLICK.



3. While continuing to hold the button down, move/drag the mouse pointer on top of the Open Position text. You will see a red dashed outline around the text.



4. Release the mouse button. Klick Rodriquiz now fills the Open Position.



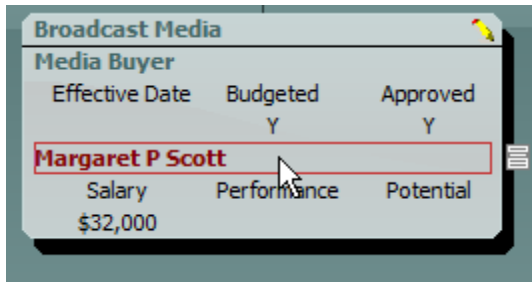
3.11 Show Multiple People Holding a Single Position

It may be necessary to show multiple people holding a single position. This can be done with drag and drop or cut and paste.

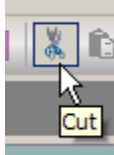
3.11.1 Add a Person to a Filled Position – Cut and Paste

1. Locate the person you wish to move.

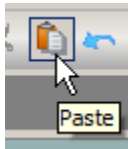
2. Click to select the person's name.



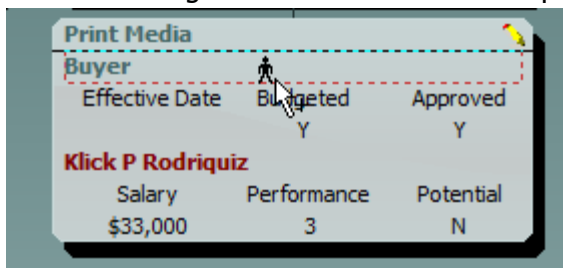
3. Select Cut.



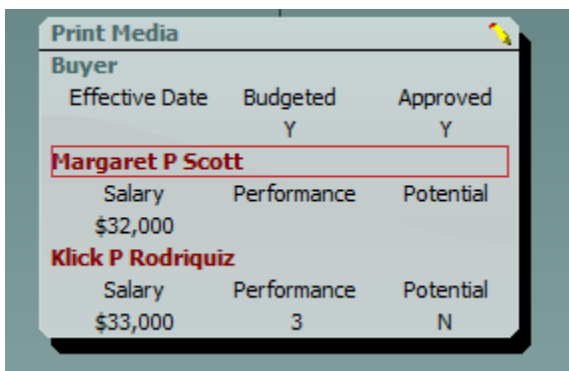
4. Navigate so you can see the new position.
5. Click on the Paste button.



6. Move the mouse pointer on top of the Job Title Text. You will see a red dashed outline around the edge of the Job Title. Click to paste.

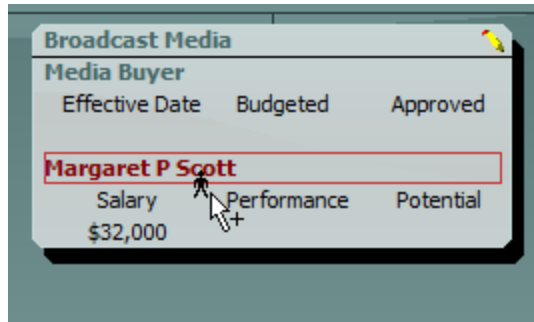


Margaret Scott is now holding the same position as Klick Rodriquiz.

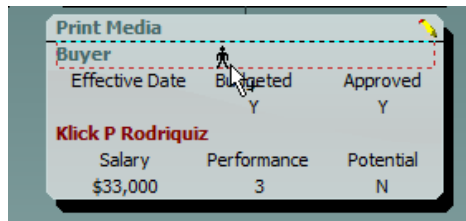


3.11.2 Add a Person to a Filled Position – Drag and Drop

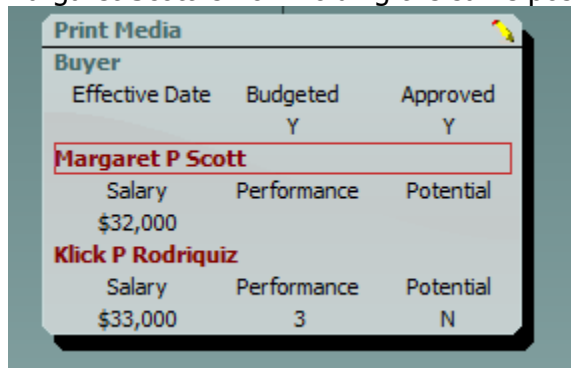
1. Place the mouse pointer on the top of the person's name to be moved. **Hold** the left button down DO NOT CLICK.



2. While continuing to hold the button down, move/drag the mouse pointer on top of the new Job Title. You will see a red dashed outline around the job title.



3. Release the mouse button
Margaret Scott is now holding the same position as Klick Rodriquiz.



3.11.3 Change the Order of Display – Multiple People Filling a Position

The simplest method for changing the display order of people holding a position is to use drag and drop.

Essentially, you will drag and drop individuals' names on the job title in the order you want them to display. In the following example, Margaret Scott is the 2nd person in the list. To move her ahead of Klick Rodriquiz:

1. Place the mouse pointer on the person's name you will move (Margaret Scott). **Hold** the left button down and DO NOT CLICK.

Move the mouse pointer/drag on top of the job title text.

Print Media		
Buyer		
Effective Date	Budgeted	Approved
	Y	Y
Klick P Rodriquiz		
Salary	Performance	Potential
\$33,000	3	N
Margaret P Scott		
Salary	Performance	Potential
\$32,000		

2. Release the mouse button.

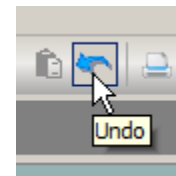
Margaret is listed first in the chart box.

Print Media		
Buyer		
Effective Date	Budgeted	Approved
	Y	Y
Margaret P Scott		
Salary	Performance	Potential
\$32,000		
Klick P Rodriquiz		
Salary	Performance	Potential
\$33,000	3	N

3.12 Undo

You may wish to Undo a move you have made. Click the Undo button to reverse the move.

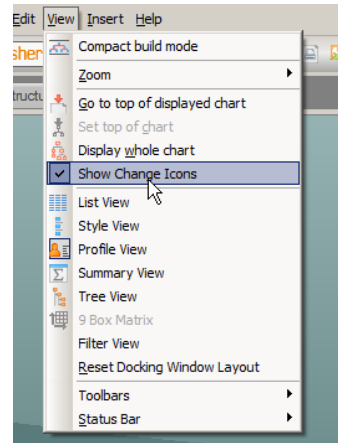
Please note: This will not undo any data field changes you have made. This only effects people or box moves.



3.13 Show Change Icons

The Show Change icon is a visual indicator that change has occurred in the planning chart. The chart administrator determines if this feature is active in a planning chart. The planner can determine if the icons are displayed.

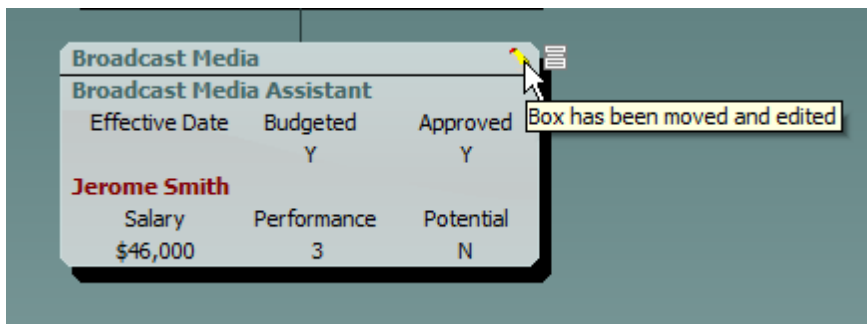
1. To display change icons, click on View.
2. Click to set a check mark beside Show Change Icons.



3.13.1 Viewing Changes Made in a Chart Box

As a planner, you may wish to view the changes that have been made to a chart box.

1. Place the mouse pointer on top of the Change Icon.



2. Click the icon to display the list of changes. In this example, Jerome Smith has a new manager and has had a salary increase.

Changes for each position in OrgPlan for Russell Heis

The following positions were modified		
Broadcast Media - Broadcast Media - Jerome Smith	From	To
Has a new manager	Media Buying - Media Buying - Karen Smith	Broadcast Media - Broadcast Media - Linda Washington
Changed Salary:	\$33,000	\$46,000

4 Views Toolbar

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.

5 Organizational Planning Change Report and Export

OrgPublisher planning charts offer output in the form of reports or comma separated data viewable in Microsoft Excel. Settings for report outputs are set by the chart administrator but modifiable by the user of Organizational Planning. In the planning chart, click the Generate a Change Report button to modify report.



5.1 General Summary - Chart

The summary options selected (to the rights) display the name of the Position Types, then names of the Groups and the differences in the Summary Fields for the whole chart. The counts **Before** (in the oldest chart) and the counts **After** (in the newest chart) are displayed. A percentage of change is also provided.

The dialog box 'Change Report Options' has two tabs: 'Generate Report' (selected) and 'Export Change Data'. Under 'Generate Report', there are several checkboxes: 'Create summary section' (checked), 'Show position type summaries' (checked), 'Show group summaries' (checked), 'Show differences in summary fields' (checked), 'Show differences for every manager' (unchecked), and 'Show summary section for every manager' (unchecked). Below these is a dropdown menu for 'Specify how you want to show people's names in the report' set to 'Box title - Name'. At the bottom, there are radio buttons for 'Where to view the report': 'View report in web browser' (unchecked) and 'View report in Microsoft Excel' (checked). 'OK' and 'Cancel' buttons are at the bottom right.

A summary of changes for each box is also displayed in this report.

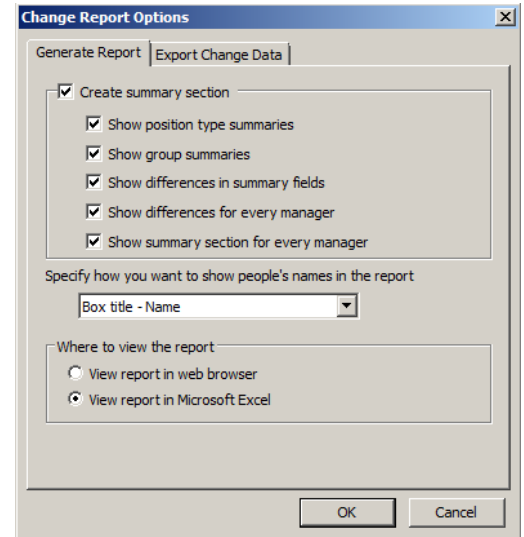
	A	B	C	D	E
4	General summary for chart				
5					
6	Position type summary	Before	After	Change (%)	
7	Open position	27	60	33 (122%)	
8	Manager	60	61	1 (1%)	
9	Employee	959	935	-24 (-2%)	
10	Assistant	11	11	0 (0%)	
11	CEO	1	1	0 (0%)	
12	Sales Mgr	1	1	0 (0%)	
13	Sales Team	92	82	-10 (-10%)	
14	Vice President	20	20	0 (0%)	
15	Sales Rep	84	84	0 (0%)	
16	Director	28	27	-1 (-3%)	
17					
18	Group summary	Before	After	Change (%)	
19	Everyone	1283	1282	-1 (0%)	
20	Executives	4	4	0 (0%)	
21	Vice Presidents	18	18	0 (0%)	
22	Directors	29	28	-1 (-3%)	
23	Managers	65	65	0 (0%)	
24	Employee	1167	1167	0 (0%)	
25	Absences	589	660	71 (12%)	
26	Sales Reps	91	91	0 (0%)	
27	Software Sales Reps	69	69	0 (0%)	
28	Hardware Sales	22	22	0 (0%)	
29	TimeToFill	30	53	23 (76%)	
30	OpenPositions	27	60	33 (122%)	
31	Low Performers	23	23	0 (0%)	
32	High Performers	408	405	-3 (0%)	
33	MidPerformers	852	854	2 (0%)	
34					
35	Data summary	Before	After	Change (%)	
36	Hardware Sales	\$1,999	\$1,999	\$0 (0%)	
37	Total Absences	2,014	2,053	39 (1%)	
38	Avg Time To Fill	20	24	4 (20%)	

5.2 General Summary – By Manager

By selecting the **Show differences for every manager** option, the following additional information is added to the report for each manager.

This summary displays the name of the Position Types, then names of the Groups and the differences in the Summary Fields for the whole chart. The counts **Before** (in the oldest chart) and the counts **After** (in the newest chart) are displayed. A percentage of change is also provided.

A summary of changes for each box is also displayed in this report.



Summary of changes for Sales - Sales - Alan Muniz				
928	Position type summary	Before	After	Change (%)
929	Open position	10	20	10 (100%)
930	Sales Team	92	82	-10 (-10%)
932	Group summary	Before	After	Change (%)
933	Absences	95	113	18 (18%)
934	TimeToFill	12	11	-1 (-8%)
935	OpenPositions	10	20	10 (100%)
937	Data summary	Before	After	Change (%)
938	Total Sales	\$97,295,200	\$91,295,200	-\$6,000,000 (-6%)
939	Software Sales	\$86,580,000	\$80,580,000	-\$6,000,000 (-6%)
941	Subordinate change detail			
942	Added U.S. Strategic Sales - U.S. Strategic Sales - Della Bentley			
943	Removed U.S. Strategic Sales - U.S. Strategic Sales - Thomas Rishty			

5.3 Position Modifications

Each Summary option provides a detailed list of changes for each chart box.

The following positions were modified

	From	To
1517	Creative Services - Creative Services - Mary Kelley	Brand Management - Brand Management - Steven Martins
1518	Has a new manager	Creative Services
1519	Moved to different box	Dir, Sr Creative Svcs&Merc
1520	Moved to a different job	Director
1521	Job type was modified	4
1522	Changed PipelineBand	3
1523	Changed Absence	2

5.4 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. Desired fields are selected by the users of an organizational planning chart.

The resulting Excel file will contain 3 tabbed worksheets:

- Added position data records
- Removed position data records
- Edited data records (field data modified or movement in the chart)

Follow these steps to format the output:

1. Access this menu by selecting the Generate a Change Report button.
2. Once the window is open, select the Export Change Data tab.
3. Click to select (check mark) any field desired in the output.
4. Click Generate to produce the Excel file with the desired fields. This will also open Excel with the 3 tabbed sheets.

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.

	A	B	C	D	E	F	G	H	I
1	Parent Box ID	Previous Parent Box ID	Box ID	Previous Box ID	Box Title	First name	Last name	Salary:	
2	24		26			Karen	Smith		
3	426	26	118			So	Wu		
4	26		119			Linda	Washington		
5	426	26	120			Klick	Rodriguez		
6	26		423			Clark	Sullivan		
7	119	26	424			Michelle	Ward	132000	
8	423	26	425	27		Katherine	Clavin		
9	26		426	28	Print Media	Jerome	Smith		

Change Report Options

Generate Report | **Export Change Data**

The export option will generate a Microsoft Excel file that has a sheet for each type of change - added positions, removed positions, edited records and boxes that were moved.

Specify which fields you want to display with each record:

- Parent Box ID
- Box ID
- Person Id
- Box Title
- Job Title
- First name
- Middle name
- Last name
- Position ID:
- Succession Rank:

Select All | Clear All

Generate | Cancel

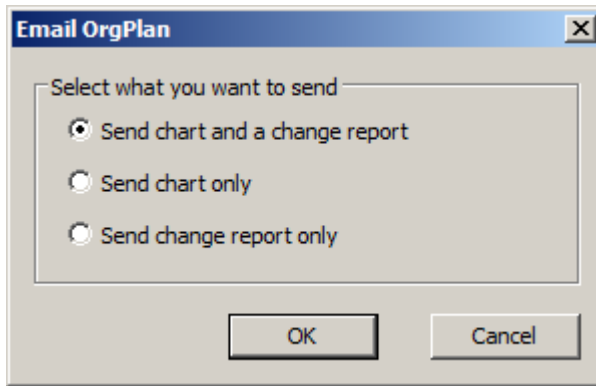
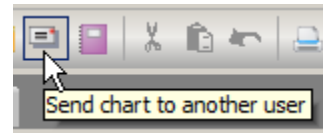
6 Distributing Charts and Change Reports

Organizational 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.

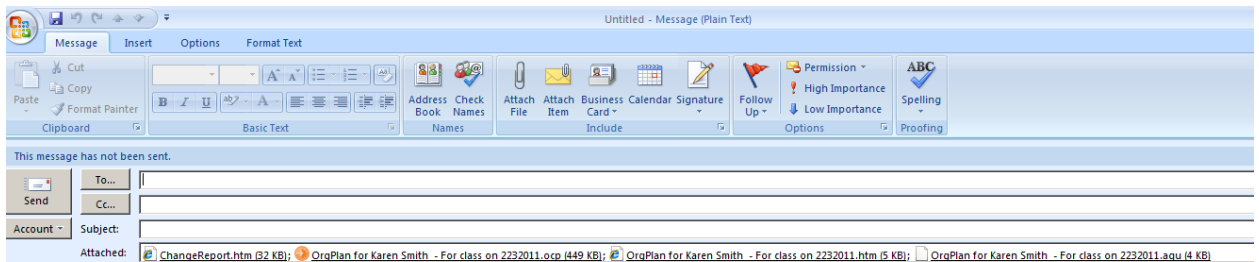
Please review the Print and PowerPoint training manual.

6.1.1 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.



To view this planning chart, please save the ocp, aqu and htm files to your hard drive and then double click the htm file.