

OrgChartHosting

TUTORIAL 9 - PLANNING MODULE

OrgChart Now Tutorials

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TABLE OF CONTENTS

4	OVERVIEW
5 – 7	PLAN EXPLORER
8	CREATING PLANS
9 – 10	UPDATING A RECORD
11	SHARING PLANS
12	PLAN DASHBOARD
13	ACTIVITY LOG
14	TALENT POOL

TUTORIAL 8

OVERVIEW

The **Planning** module is designed to facilitate organizational design exercises. Multiple planners can collaborate in real-time to restructure any branch of an organization.

A planner can participate as one of the following three roles:

- **Viewer** – Read plans that have been shared with *that* user.
- **Collaborator** – Update plans that have been shared with *that* user
- **Plan Owner** – Synchronize plans you've created against the source data and share your plans with Viewers and/or Collaborators.

NOTE:

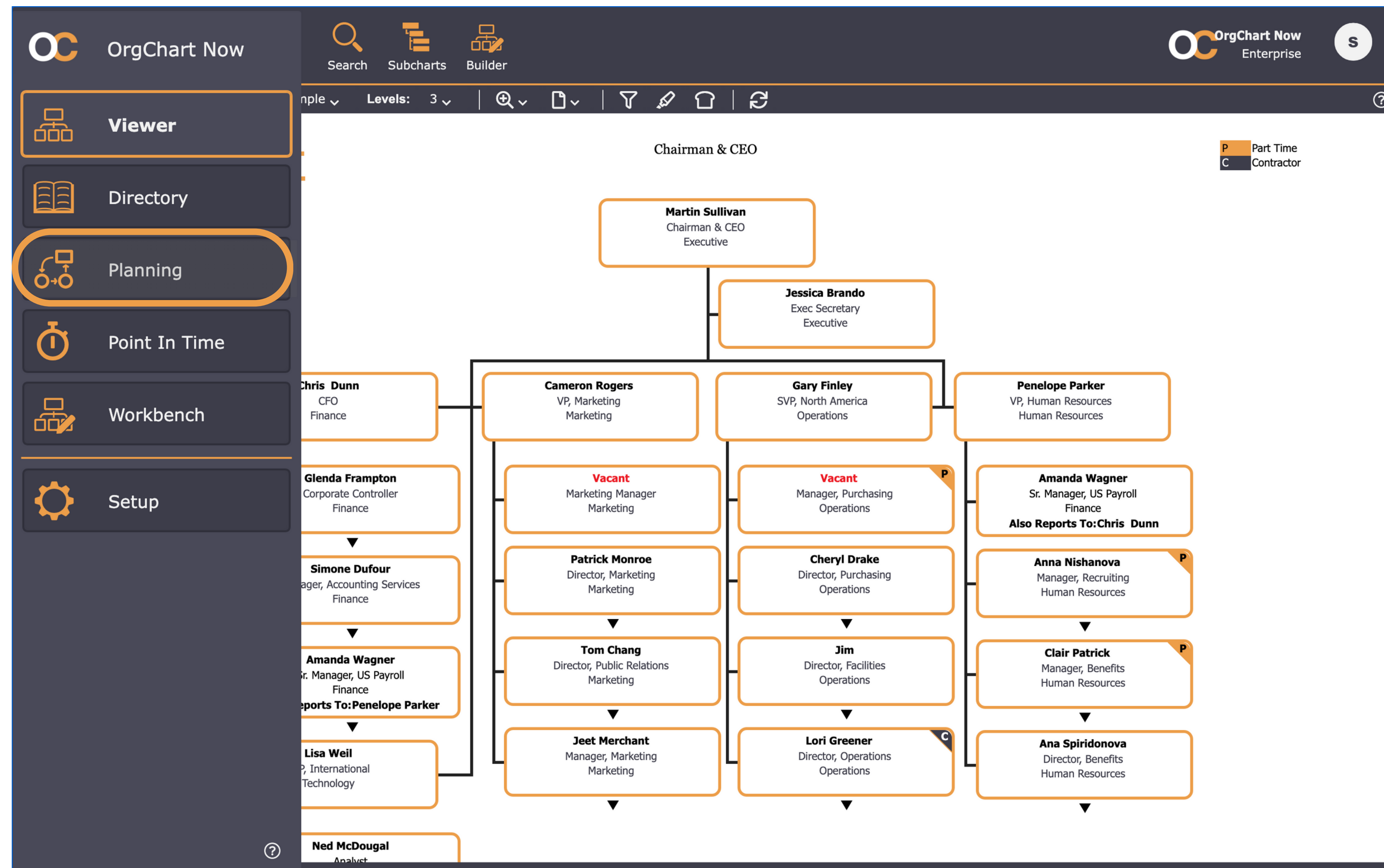
Not all users have access to Planning.

Your OrgChart administrator can grant you access by upgrading your Role to Read/Write, and enabling Planning in your UI Profile.

Important:

Administrators can share, modify, delete, lock, and archive any plan within the account. Even those that have not been directly shared with that user.

ORGCHART PLANNING MODULE – OVERVIEW



1 Click on the menu icon

2 Select the Planning option

Planning Module Functionality

- Plan Explorer: Manage all plans shared with or created by the current user.
- Creating Plans: Create a new plan.
- Updating Plans: Modify plans (add, delete, move and update boxes within a plan).
- Sharing Plans: Share plans with collaborators and viewers.
- Plan Dashboard: Review metrics and information about the current plan.
- Activity Log: Track all changes that have been made to the current plan.
- Talent Pool: Identify candidates and then deploy them within the current plan.
- Append Plan: Merge a plan into a Master Chart to view the future state in the context of the rest of the organization.

ORGCHART PLANNING MODULE – PLAN EXPLORER

The Plan Explorer provides an interface to manage all plans shared with, or created by, the current user. The extent to which a user can interact with a plan, depends upon their plan role.

The screenshot displays the 'Plan Explorer' window within the OrgChart Now Enterprise application. The window title is 'Plan Explorer' and it features a search bar and three tabs: 'Active Plans', 'Archived Plans', and 'Administrator'. The 'Active Plans' tab is active, showing a table with the following data:

Plan Name	Created	Date Modified	Role	Status
HR Re-Org	February 23, 2021 at 9:11 AM	August 24, 2023 at 8:15 AM	Owner	Active
Exec Re-Org Q1	March 2, 2021 at 3:55 PM	July 4, 2022 at 12:39 PM	Owner	Active
Exec Re-Org Q2	March 3, 2021 at 10:23 AM	July 28, 2022 at 3:06 PM	Owner	Active
Marketing Reorg	March 9, 2021 at 12:10 PM	July 27, 2023 at 11:53 AM	Owner	Active
Marketing Re-Org Q3	March 23, 2021 at 12:28 PM	July 5, 2022 at 11:21 AM	Owner	Locked
HR reorg Q2	March 26, 2021 at 8:08 AM	March 26, 2021 at 8:11 AM	Owner	Active

Below the table, there are buttons for 'New Plan', 'Open Plan', and 'Exit'. The background shows a partial view of an organizational chart with departments like 'Srv, International Technology', 'marketing', 'Operations', and 'Human Resources', and a user 'Ned McDougal Analyst'.

Plan Explorer

All planners will have access to the following tabs:

- Active Plans – Contains all plans that you have created, or that have been shared with you, that are currently Active.
- Archived Plans – Contains all plans that you have created, or that have been shared with you, that are currently Archived.

Planners with an assigned access role of Administrator will have access to an additional tab:

- Administrator – Contains all active and archived plans in the account of which the current user is not a plan owner.

Plan Roles

Roles determine how a user can interact with a specific plan. For each plan, users are assigned one of the following roles:

- Owner: can modify, synchronize, share, delete, lock, and archive their plans.
- Collaborator: can move, update, delete and add boxes to plans.
- Viewer: can view plans, but not make any changes.

ORGCHART PLANNING MODULE – PLAN EXPLORER

The Plan Explorer provides an interface to manage all plans shared with, or created by, the current user. The extent to which a user can interact with a plan, depends upon their plan role.





The screenshot displays the 'Plan Explorer' window within the OrgChart Now Enterprise application. The window title is 'Plan Explorer' and it contains a table of active plans. The table has the following data:

Plan Name	Created	Date Modified	Role	Status
HR Re-Org	February 23, 2021 at 9:11 AM	August 24, 2023 at 8:15 AM	Owner	Active
Exec Re-Org Q1	March 2, 2021 at 3:55 PM	July 4, 2022 at 12:39 PM	Owner	Active
Exec Re-Org Q2	March 3, 2021 at 10:23 AM	July 28, 2022 at 3:06 PM	Owner	Active
Marketing Reorg	March 9, 2021 at 12:10 PM	July 27, 2023 at 11:53 AM	Owner	Active
Marketing Re-Org Q3	March 23, 2021 at 12:28 PM	July 5, 2022 at 11:21 AM	Owner	Locked
HR reorg Q2	March 26, 2021 at 8:08 AM	March 26, 2021 at 8:11 AM	Owner	Active

Below the table, there are three buttons: 'New Plan' (green), 'Open Plan' (grey), and 'Exit' (black). The background of the application shows an organizational chart with departments: Technology, Marketing, Operations, and Human Resources. A user profile for 'Ned McDougal, Analyst' is visible at the bottom left.

Plan Explorer Functions

The following functionality is available in the Plan Explorer. Your role determines which functions you can apply to any given plan.

- Find: Search for a specific plan
-  : Mouse over a plan to share it with other users.
-  : Mouse over a plan row to lock or unlock a plan. Locked plans cannot be edited.
-  : Mouse over a plan row to expand the Additional Plans Options menu.
-  : Mouse over a plan row to download a copy of the selected plan.
- New Plan: Create a new plan using the Plan Builder.
- Open Plan: Open the selected plan.
- Exit: Exit Plan Explorer


ORGCHART PLANNING MODULE – PLAN EXPLORER

The Plan Explorer provides an interface to manage all plans shared with, or created by, the current user. The extent to which a user can interact with a plan, depends upon their plan role.

The screenshot displays the OrgChart Now Enterprise Plan Explorer interface. The top navigation bar includes icons for Viewer, Export, Profile, Search, Subcharts, and Builder. The main content area shows a table of active plans under the 'Chairman & CEO' view. The table has columns for Plan Name, Created, Date Modified, Role, and Status. A legend indicates 'P' for Part Time and 'C' for Contractor. Below the table are buttons for 'New Plan', 'Open Plan', and 'Exit'. The background shows an organizational chart with departments like Technology, Marketing, Operations, and Human Resources.

Plan Name	Created	Date Modified	Role	Status
HR Re-Org	February 23, 2021 at 9:11 AM	August 24, 2023 at 8:15 AM	Owner	Active
Exec Re-Org Q1	March 2, 2021 at 3:55 PM	July 4, 2022 at 12:39 PM	Owner	Active
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Additional Plan Options

The following additional options are available. Mouse over a plan row and then click on the  button to access additional Plan Options.

- **Rename Plan:** Rename the selected Plan
- **Duplicate Plan:** Duplicate the selected plan.
- **Archive Plan:** Archive the selected plan (only available for Active Plans). Archived plans cannot be edited; however, Archived Plans can be reactivated. if additional editing needs to occur.
- **Activate Plan:** Reactivate an archived plan.
- **Delete Plan:** Permanently delete the selected plan.
- **Editable Fields:** Specify which fields within a plan that a collaborator (or plan owner) can edit.
- **Effective Dates:** Toggle to enable/disable use of effective dates for plan changes (add, delete, move or update).

ORGCART PLANNING MODULE – CREATING PLANS

1

In the [Plan Explorer](#), click on the New Plan button. The Plan Builder dialog is displayed.

2

Enter a name for the plan.

3

Click on the search bar (beneath the Which employee would you like at the top of this plan prompt) to search for the employee who will be at the top of the plan.

4

Click on the Levels dropdown menu (under the How many levels under this employee would you like to include prompt) to select the number of organizational levels beneath the top employee to include in the plan.

5

Click on the Go button to create a plan. You can [update the plan](#) as needed.

The screenshot displays the OrgChart Now Enterprise software interface. At the top, there is a navigation bar with icons for Viewer, Export, Profile, Search, Subcharts, and Builder. The main area shows an organizational chart for 'Chairman & CEO'. A 'Plan Builder' dialog box is open in the center, containing the following fields and options:

- Name your plan, choose a starting point, and start planning.**
- Choose a name for this plan:** A text input field with the placeholder 'Enter Plan Name'.
- Which employee would you like at the top of this plan?:** A search bar with a magnifying glass icon and the selected result 'Martin Sullivan, Chairman & CEO'.
- How many levels under this employee would you like to include?:** A dropdown menu currently set to 'All Levels'.
- Additional Options:** A section with a downward arrow, containing 'Cancel' and 'Plan' buttons.

The background organizational chart shows a hierarchy starting with Chris Dunn (CFO, Finance) at the top. Other employees include Glenda (Corporate Finance), Simon (Manager, Accounting), Amanda (Sr. Manager, Finance), Lisa Weil (SVP, International Technology), Ned McDougal (Analyst), Jeet Merchant (Manager, Marketing), Lori Greener (Director, Operations), and Ana Spiridonova (Director, Benefits Human Resources). A legend in the top right corner indicates 'P' for Part Time and 'C' for Contractor.

ORGCHART PLANNING MODULE – UPDATING A RECORD

Plan Owners, Collaborators, and Administrators can add, delete, move, and update records within a plan. Planners can also add a comment to any record.

A plan must be 'Active,' and you must have Owner or Collaborator privileges to make updates to a plan.

The screenshot displays the OrgChart Now Enterprise interface. The main area shows an organizational chart for the 'Rebrand HR Plan' under the 'VP, Human Resources' category. The chart is headed by Penelope Parker (VP, Human Resources). Below her are six reporting lines: Anna Nishanova (Manager, Recruiting), Ana Spiridonova (Director, Benefits), a Vacant Recruiting Specialist position, Gary Montgomery (Senior Recruiter), Victor Mizik (Recruiting Specialist), and another Vacant HR Assistant position. A context menu is open over the 'Vacant Recruiting Specialist' box, showing options: Edit (pencil icon), Add subordinate (+), Move (right arrow), Move outside (left arrow), Remove (X), and Add comment (speech bubble).

The right-hand dashboard for the 'Rebrand HR Plan' shows it is 'Active' and provides the following information:

- Last Modified: December 14, 2023 at 11:47 AM
- Last Sync: November 15, 2023 at 3:21 PM







The 'Plan Metrics' table is as follows:

Name	Starting	Current
Headcount	12	19 (+7)
Total Vacant Positions	1	7 (+6)
Total Salary	599,000	537,000 (-62,000)
Hispanic or Latino	0.08	0.08
Average Salary	49,916.67	28,263.16 (-21,653.51)

The 'Team Members' section lists one member: support@orgcharthosting.co.za (Owner).

1 Mouse over the box you want to update.

2 Select from one of the available actions. You can add a subordinate, delete the current box, move the current box, or update information about the current box.

-  Edit the current record.
-  Add a subordinate record.
-  Move current record to report to another manager.
-  Move current record outside of the plan.
-  Remove current record.
-  Add a comment.

ORGCHART PLANNING MODULE – UPDATING A RECORD

Plan Owners, Collaborators, and Administrators can add, delete, move, and update records within a plan. Planners can also add a comment to any record.

A plan must be 'Active,' and you must have Owner or Collaborator privileges to make updates to a plan.

The screenshot displays the OrgChart Now Enterprise interface. The main dashboard is titled 'Rebrand HR Plan' and shows a 'VP, Human Resources' view. An 'Edit Box' for 'Ana Spiridonova (4524)' is open, showing the following details:

- Reports To:** Penelope Parker (4425)
- Basic Info:**
 - PositionID: 4524
 - FullName: Ana Spiridonova
 - JobTitle: Director, Benefits
 - Department: Human Resources
 - WorkLocation: San Francisco
- Comments:** Maternity Leave in 1 months

The dashboard also features a 'Plan Metrics' table and a 'Team Members' list.

Starting	Current
19	19 (+7)
7	7 (+6)
9,000	537,000 (-62,000)
8	0.08
916.67	28,263.16 (-21,653.51)



3 After selecting an action, the Update Panel is displayed.

ORGCHART PLANNING MODULE – SHARING PLANS

Plans can be shared with team members. When a plan owner shares a plan, the owner must set the role for each planner. The following roles are available:

- Viewers – View plans
- Collaborators – View and update plans (i.e. add, move, update, or delete boxes)

Options

- Default add as collaborators checkbox: Check to set the role for all subsequent users added to the Share Plan list as Collaborators. Uncheck to set the role for all subsequent users added to the Share Plan list as Viewers.
- Select a group to share with: Click on this element to share a plan with all users assigned to a specific Access Group.
- Select a user to share with: Click on this element to share a plan with a specific user. When a plan is shared with a user, that user will receive an email containing a link to the shared plan.
-  : Mouse over a user, and then click on the Change Role icon to modify a user's role.
-  : Mouse over a user, and then click on the Remove User icon to stop sharing the current plan with that user.
- Copy Link: Click to copy an automatically generated URL that can be shared with a colleague.
- Send email invite to plan: Check to send an email to the users in the Share Plan list with a link to the current plan.

The screenshot displays the OrgChart Now Enterprise interface. The main area shows an organizational chart for 'VP, Human Resources' with users: Anna Nishanova (Manager, Recruiting), Ana Spiridonova (Director, Benefits), and Vacant (Recruiting Specialist). A 'Share Plan' dialog box is open, allowing users to share the plan with others. The dialog includes a 'Share with others' section with a 'Copy Link' button, a checked 'Default add as collaborators' option, and dropdown menus for selecting a group and a user. There is also a 'Send email invite to plan' checkbox and 'Cancel' and 'Save' buttons. On the right, a 'Rebrand HR Plan' dashboard is visible, showing 'Active' status, last modified date (December 14, 2023), and a 'Plan Metrics' table.

Plan Metrics		
Name	Starting	Current
Headcount	12	19 (+7)
Total Vacant Positions	1	7 (+6)
Total Salary	599,000	537,000 (-62,000)
Hispanic or Latino	0.08	0.08
Average Salary	49,916.67	28,263.16 (-21,653.51)

ORGCHART PLANNING MODULE – PLAN DASHBOARD

The Plan Dashboard displays information about the current plan.

Plan Information

The following information is shown at the top of the Dashboard Tab:

- Plan Name: Plan name as specified by the plan owner. The plan name can be modified using the [Plan Explorer](#).
- Plan Status: Active – Plan can be modified. Locked – Plan cannot be modified. Archived – Plan has been archived (and cannot be modified unless reactivated).
- Last Modified: Last time plan was modified by a collaborator or owner.
- Last Sync: Last time plan was synchronized with source data.

Plan Metrics

The Plan Metrics table allows your team to model toward a goal. The Headcount metric is automatically included when creating plan.

- Starting: Value of the metric when the plan was created.
- Current: Value of the metric, calculated in real-time as the plan is updated.
- Target: This is the desired (or goal) value for a metric.

ORGCHART PLANNING MODULE – ACTIVITY LOG

The Activity Log allows Plan Owners, Collaborators, Viewers, and Administrators to track all the changes that have been made within a plan.

Summary Mode

The Summary Mode groups changes by type (Add, Change, Comment, Delete, Move).

Clicking on an update shows additional information about the update (at the bottom, in the Details panel) and navigates to the associated change in the org chart.

History Mode

The History Mode groups changes based on when the changes were made.

Clicking on an update shows additional details about the update (at the bottom in the Details panel) and navigates to the associated change in the org chart.

The screenshot shows the OrgChart Now Enterprise interface. The main area displays an organizational chart for 'VP, Human Resources'. The chart has a root node 'Penelope Parker' (VP, Human Resources) with six direct reports: 'Anna Nishanova' (Manager, Recruiting), 'Ana Spiridonova' (Director, Benefits), 'Vacant' (Recruiting Specialist), 'Gary Montgomery' (Senior Recruiter), 'Victor Mizik' (Recruiting Specialist), and another 'Vacant' (HR Assistant). The 'Anna Nishanova' node has a red 'X' icon, and the 'Gary Montgomery' and 'Victor Mizik' nodes have blue arrows pointing to them. The right sidebar shows the 'Activity Log' with a search bar and a list of changes categorized by type: Adds (8), Changes (1), Comments (1), Deletes (1), and Moves (4).

Category	Item
Adds (8)	Vacant (NEW_0000)
	Vacant (NEW_0001)
	Vacant (NEW_0002)
	Vacant (NEW_0003)
	Vacant (NEW_0004)
	Vacant (NEW_0005)
	Anne Bi (NEW_0006)
Ai Su (NEW_0007)	
Changes (1)	Jane Long (4472)
Comments (1)	Ana Spiridonova (4524)
Deletes (1)	Anna Nishanova (4429)
Moves (4)	Vacant (43400)
	Gary Montgomery (4434)
	Victor Mizik (4437)
	Clair Patrick (4435)

ORGCHART PLANNING MODULE – TALENT POOL

When trying to identify the right person to fill an open role, you may want to consider more than one candidate. The Talent Pool allows you to identify a list of potential candidates for any position.

The screenshot displays the OrgChart Now Enterprise interface. The top navigation bar includes icons for Planning, Export, Profile, Search, and Subcharts. The main area shows an organizational chart for 'VP, Human Resources' with Penelope Parker at the top. Below her are six roles: Anna Nishanova (Manager, Recruiting), Ana Spiridonova (Director, Benefits), a Vacant Recruiting Specialist, Gary Montgomery (Senior Recruiter), Victor Mizik (Recruiting Specialist), and another Vacant HR Assistant. The right sidebar is titled 'Talent Pool' and contains a search bar and the text 'No records staged. Search to add new records.'.

1 Click on the View drop-down and select the view you wish to navigate to.

For this example we will be clicking on the Card View.

2 The view will then auto-apply to your chart to show you the information designed to be displayed in that specific view.

CONCLUSION

END OF TUTORIAL 9

In this interactive tutorial, we covered some of the key features of OrgChart Planning – Plan Explorer, Creating Plans, Updating Records, Sharing Plans, Plan Dashboard, Activity Log and Talent Pool.

This is the last of the PDF tutorial documents.

Contact support@orgcharthosting.co.za if you need any assistance or have any enquiries regarding any of the tutorials.



OrgChartHosting

**Empower your organization to
make informed people decisions.**

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