



## OrgPublisher What-If Succession Planning

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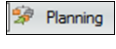
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# Creating and Editing What-If Succession Planning Charts

When the chart is published, the viewer sees one of the following buttons, based on the administrator's selection when publishing the planning-enabled chart.

 - What-If Organizational Planning only

 - What-If Succession Planning only

 - Organizational and Succession Planning

If only one option is available, the planner is taken to the appropriate dialog to open the chart. If both options are available, the planner is prompted to select the type of planning chart to open.

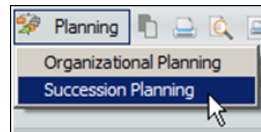


Figure 1.

If there are no existing what-if succession charts, the New Succession Planning Chart dialog opens.

1. Type a name for the chart or accept the default shown in the dialog.



Figure 2.

2. Complete, or select, the appropriate options.

- **Password** – The planner can be required to supply a password if the chart administrator selected this through the publishing process. The planner may also choose to set a password for the end users of the modeling charts.
- **Restrict planning chart size** – The planner may limit the number of levels available within the modeling chart.
- **Create a shortcut** – The planner may create a shortcut to the planning chart on his/her desktop.

If a modeling chart exists, a dialog displays the list of the charts. Planners can open, delete, or edit charts.

To open a modeling chart select a chart from the list and click **Open**.

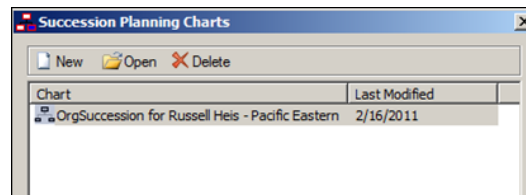


Figure 3.

## Changing the Location of the What-If Organizational Planning Charts

Planning charts are stored on the server (EChart only) or on your local machine. If you want to change the location:

1. In the Succession Planning Charts dialog, click **Move Chart Location**.

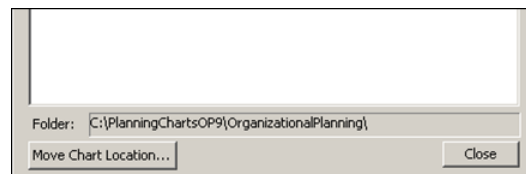


Figure 4.

2. **Browse** to or type the **Folder** name for the new location.

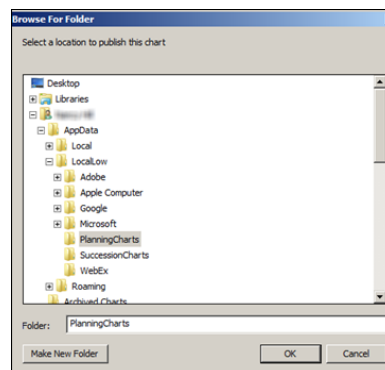
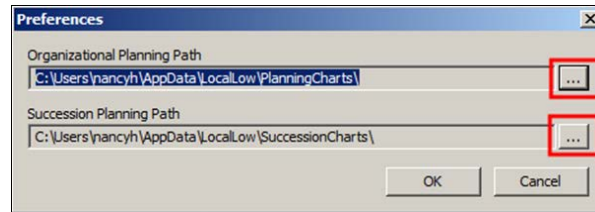


Figure 5.

If necessary, click **Make New Folder**.

Click **OK**.

- Open the modeling chart and select **File**, then **Preferences**. The Preferences dialog opens.
- Click the Browse button to navigate to the new folder location and click **OK**.



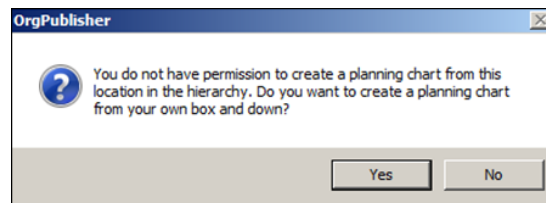
**Figure 6.**

- A message prompt asks if you want to move all planning charts to a new folder. Click **Yes**.

## Securing EChart What-If Organizational Planning Charts

The chart administrator can limit planning to a selected span of control. After this has been applied and you attempt to create a planning chart outside the span of control, the following occurs.

- If your chart box is not the current top of chart, you are prompted to produce a planning chart containing boxes within your span of control.



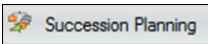
**Figure 7.**

- If your chart box is the current top of chart, the New Succession Planning Chart dialog opens.
- 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 is the span of control included in the planning chart.

## PluginX

When working with a published PluginX what-f succession planning chart, the current top of chart box is the span of control included in the planning chart.

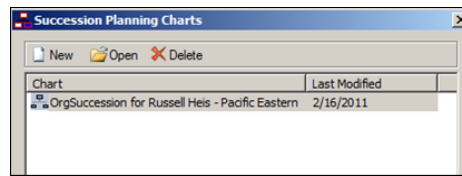
## Returning to a What-If Succession Planning Chart

- Open the published chart on your intranet.
- Click the planning button  in the toolbar.

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3. In the Succession Planning Charts dialog, select the planning you need and click **Open**.



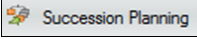
**Figure 8.**

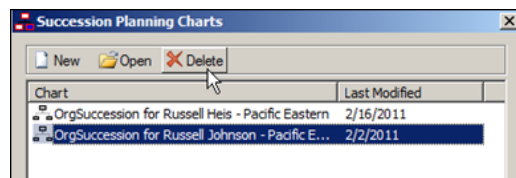
If a desktop shortcut was created for your planning chart, you can choose to double-click the icon to open the chart.



**Figure 9.**

## Deleting a Succession Planning Chart

1. Open the published chart on your intranet.
2. Click the planning button  in the toolbar.
3. In the Succession Planning Charts dialog, select the planning you need and click **Delete**.



**Figure 10.**

4. Confirm you want to delete the chart and, if applicable, the shortcut icon. You are notified that the deletion is complete.

## Using the Views Toolbar

The chart administrator defines the look and feel for each view. If enabled by the administrator, planners can click the toolbar button to open a view and click it again to close it.

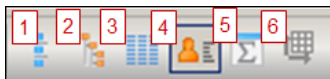


Figure 11.

1. **Styles View** – Lists the available styles in the chart. Click to select the style you want to see.
2. **Tree View** – Displays the organization hierarchy in an outline format.
3. **List View** – Displays chart data in a spreadsheet layout. A second pane within the view opens the **Search View**, offering search options and displaying results in a spreadsheet layout.
4. **Profile View** – Displays additional data about an individual that may not appear in the chart box.
5. **Summary View** – Displays counts and summaries of numeric fields. A second tab opens the **Graphs** dialog enabling you to create, modify, and view summary data in a graphical format.
6. **9 Box View** – Displays individuals as they fall within a 9 box grid, a matrix typically measuring potential and performance in succession candidates.

## Creating a Successor in a Succession Chart – Drag and Drop

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.

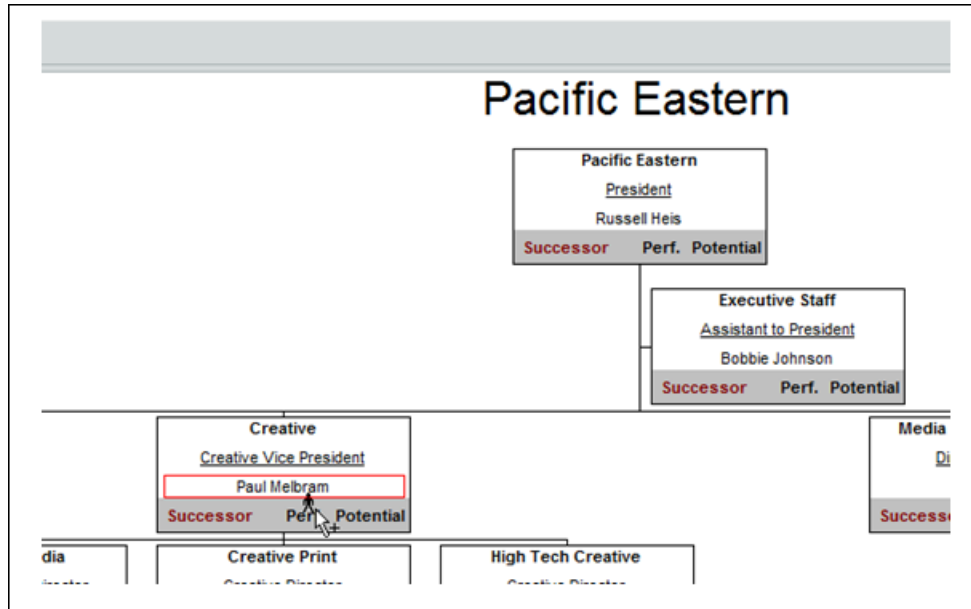


Figure 12.

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

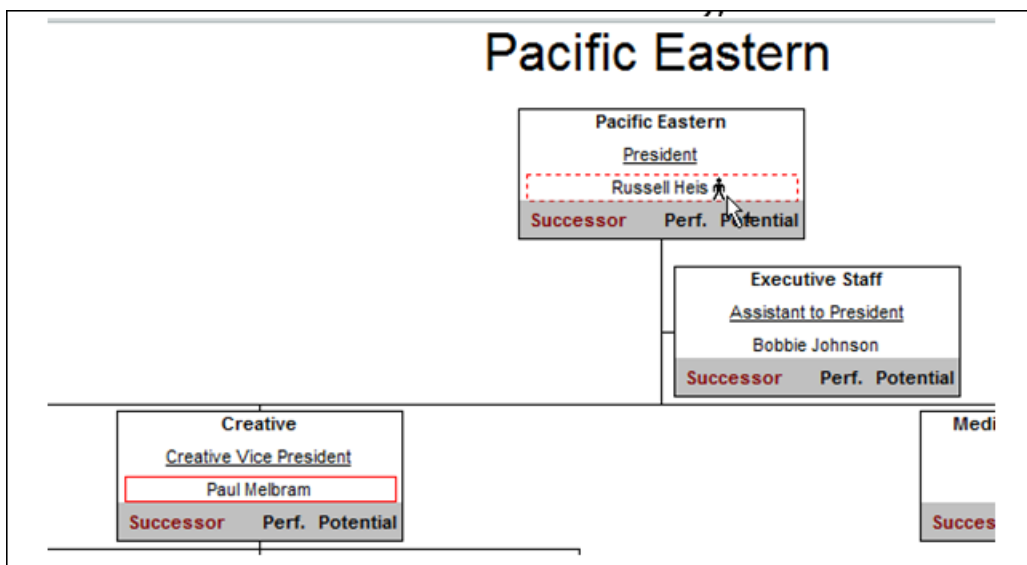


Figure 13.



The successor's name appears below the current position holder and a change icon appears in the top-right corner of the chart box.

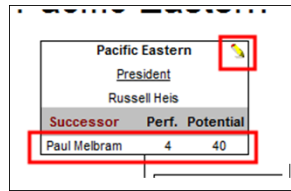


Figure 14.

## Creating a Successor in a Succession Chart – Copy and Paste

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

1. Place the mouse pointer on the person who is to become a successor. Right-click and select **Copy**.

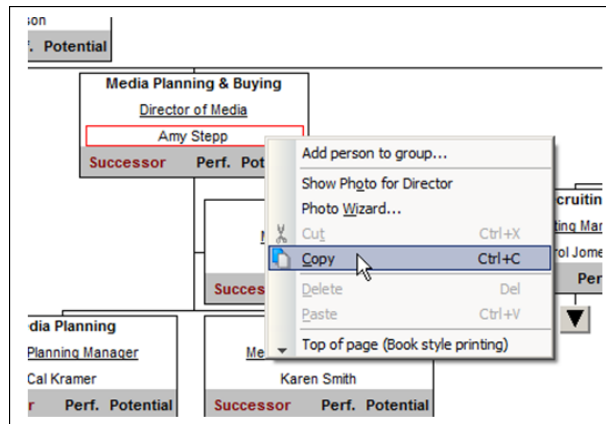


Figure 15.

2. Locate the box containing the current holder of the position by:
  - Searching for the person's name and clicking to navigate to the person
  - Drilling to the person
  - Scrolling
3. Place the mouse pointer on the person's name. Right-click and select Paste.

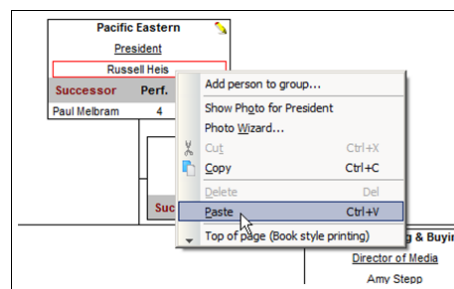


Figure 16.

The pasted record is now a successor.

Pacific Eastern		
President		
Russell Heis		
Successor	Perf.	Potential
Amy Stepp	4	40
Paul Melbram	4	40

Figure 17.

## Using Search View to Create a Successor

Another easy method for adding successors is to locate the successor in the Search View pane of the List View or by using the Search button in the toolbar.

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

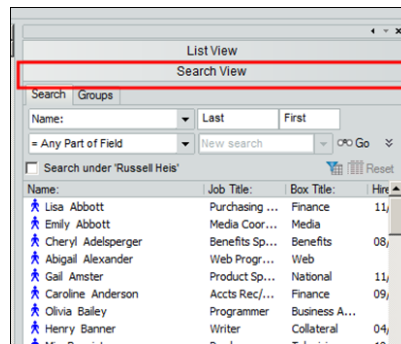


Figure 18.

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

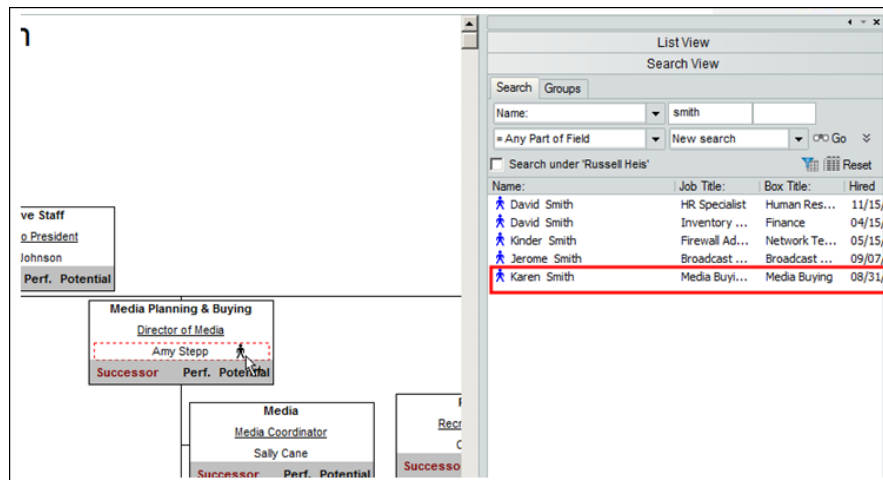


Figure 19.

5. Release the mouse button.

The successor is added to the chart box and the person now appears twice in the Search View. The red entry indicates the succor position held in the chart.

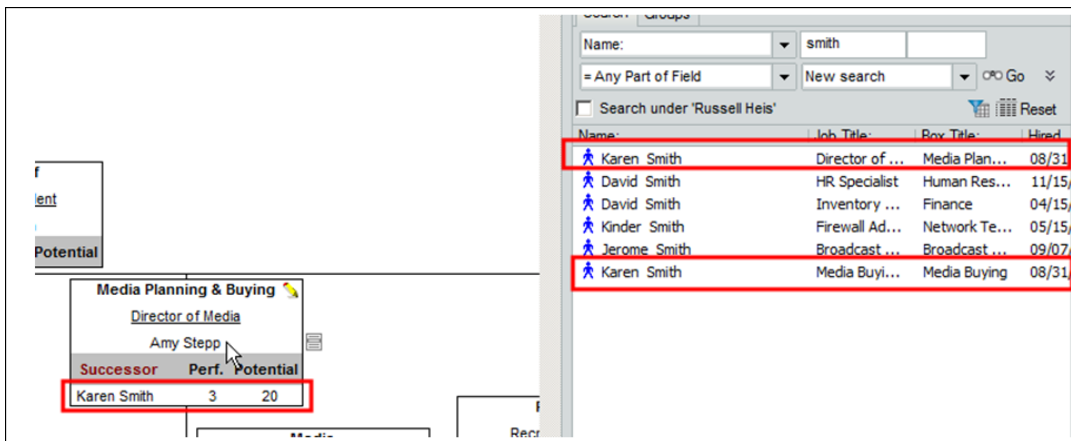


Figure 20.

The Search View list indicates the status of the listing, as noted in the following figures. If the planner restricted the planning chart size and there are people on lower levels in the organization, these records appear in the Search View. Drag and drop to place them in the chart as successors. (Clicking on the name does not navigate within the chart because the person is not charted in the succession planning chart.)

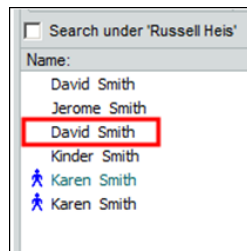


Figure 21.

If the chart administrator formats the name for the successor position with a color other than black, the successor name displays in that color in the Search View list. This distinguishes successor records from other records in the list. An icon appearing to the left of the name indicates that the person is charted in the planning chart. You can use drag and drop from the Search View or click on the name in the chart and navigate to the planned chart box.

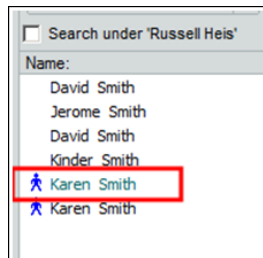


Figure 22.

Names for non-successor positions display in the Search View list. An icon appearing to the left of the name indicates that the person is charted in the planning chart. You can use drag and drop from the Search View or click on the name in the chart and navigate to the planned chart box.



Figure 23.

## Using 9 Box Results to Create a Successor

If a 9 Box Matrix view has been formatted and displays in the chart, you can drag and drop individuals from the 9 Box into successor fields. If the 9 Box Matrix View is not displayed,

click the 9 Box button  in the toolbar.

**Note:** The 9 Box Matrix View does not launch if the chart administrator has not created and formatted the matrix.

1. Place the mouse pointer on the person in the 9 Box View you want to move. Hold the left mouse button down and drag to the box of the person to succeed.
2. Release the mouse button to drop the successor into the new box.

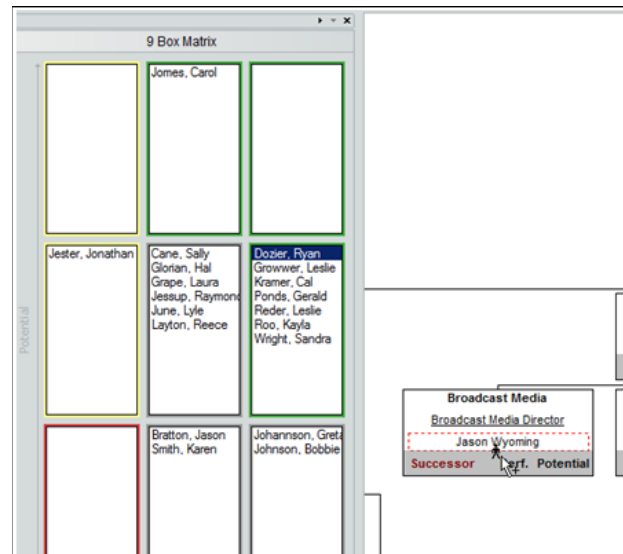


Figure 24.

## Moving a Successor - Drag and Drop

A successor can be moved from one box to another in the what-if succession planning chart.

1. Place the mouse pointer on the successor's name. Hold the left mouse button down and drag the successor to the new location.
2. Release the mouse button to drop the successor into the new location. The figure below shows Karen Smith moving from the successor to Amy Stepp, on the right, to the successor of Paul Melbram, on the left.

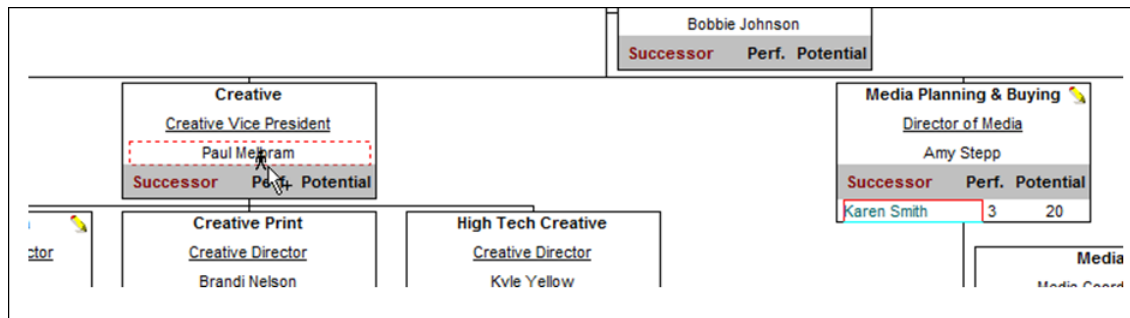


Figure 25.

## Moving a Successor – Cut and Paste

1. Place the mouse pointer on the successor's name in the chart box and right-click.
2. Select **Cut** from the options list.
3. Place the mouse pointer on the new location and right-click.
4. Select **Paste** from the options list. The successor now displays as the successor in the new location. The figure below shows Karen Smith cut from one box, on the left, and pasted into another box, on the right.

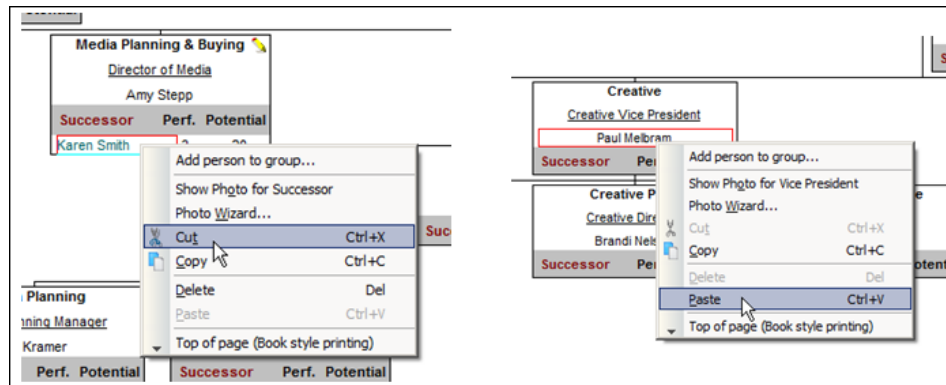


Figure 26.

## Placing a Person in a Second Successor Position

One person may be a successor to more than one position. Drag and drop or copy and paste the name in the new location in order to place the person in a second successor position.

## Deleting a Successor

If you have placed a person into a successor role in the chart and you must remove them, right-click on the successor name in the box and select **Delete** from the options list. This removes only that occurrence of the person within the chart.

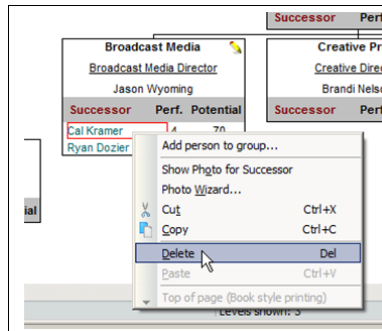


Figure 27.

## Rearranging Successors within a Chart Box

When you add multiple successors in a single box, you can reposition them to indicate which person is the first, second, or third successor in line for the position.

1. Place the mouse pointer over the name of the successor you want to move and hold the left mouse button down.

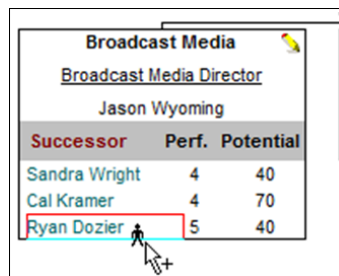


Figure 28.

2. Drag the successor name on top of the successor name that should be above the name you are moving, as shown in the figure below, and release the mouse button.

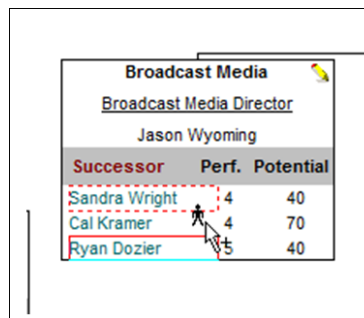
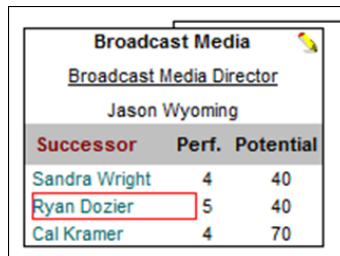


Figure 29.

The successors are rearranged, as show in the figure below.



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

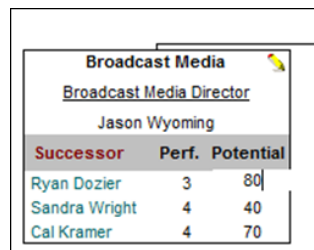
**Figure 30.**

- Repeat steps 1 – 2 to reorder any other successors.

## Editing Successor Data

Any data, with the exception of the person's name, associated with the successor position shown in the chart box is editable. If the successor data is the source for the 9 Box Matrix, the successor's placement in the 9 Box is affected by the data change.

- Click once on the data you want to edit.
- Click a second time to place the cursor in the text area.
- Select the existing text and type over it with the new data.
- Click on a blank space in the chart to complete the data update.



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

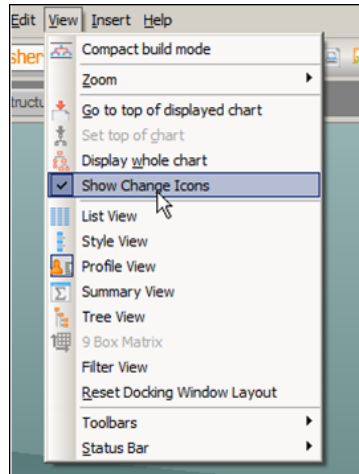
**Figure 31.**

**Note:** If a person appears more than once in the what-if succession planning chart, the data update only affects the selected occurrence of the person. If applicable, navigate to the other occurrences for the person and update the data for those entries.

## Showing Change Icons

The show change icon is a visual indicator that change has occurred in the what-if succession planning chart. The chart administrator determines if this feature is enabled. Planners can determine if the icons are displayed in the modeling chart.

Click **View** in the main menu and select **Show Change Icons** from the options list.




**Figure 32.**



## Using the What-If Succession Planning Change Report

All changes made in the planning chart are tracked. The movement report is available to view or print.

### Modifying Change Report Settings

1. Click the Generate a Change Report button . The Change Report Options dialog opens.
2. In the **Generate Report** tab, click the drop-down arrow and select the format you want to use when displaying names.
3. If you select **Custom**, the Custom Name Format dialog opens.

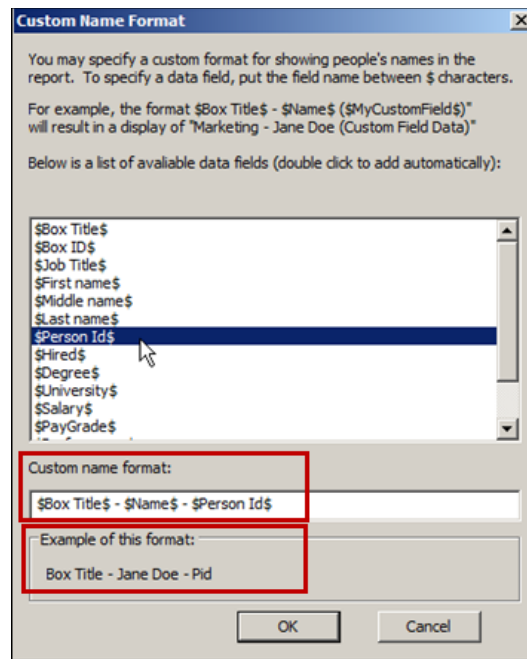


Figure 33.

4. Double-click the fields you want to add to the name display. Your selections appear in the **Custom name format** field and an example of the report display appears at the bottom of the dialog.
5. Click **OK** to return to the Change Report Options dialog and select the method to view the report, in the browser or a spreadsheet.

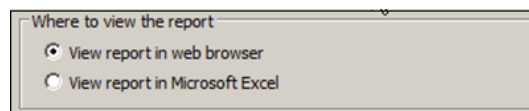


Figure 34.

6. Click **Generate**.

The following report sample shows three people were added as successors to Russell Heis.

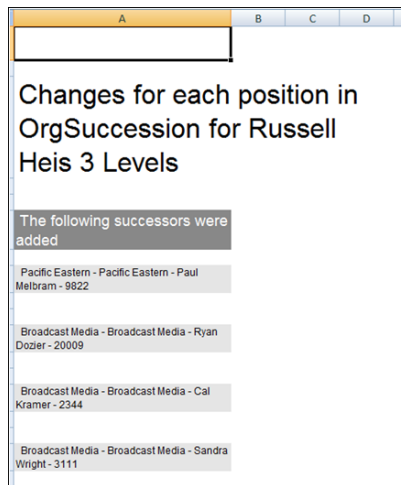


Figure 35.

### Exporting Change Data


Responding to client requests, you can create a comma separated file reflecting changes that can be used to upload into a source HR system. Planners select the required fields within the what-if planning charts.

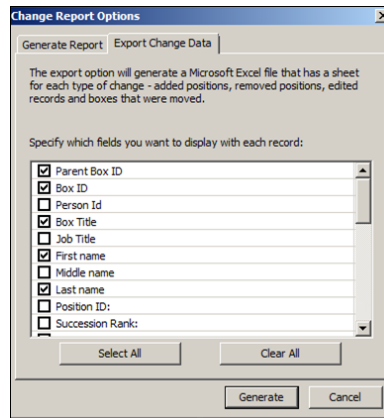
The resulting Microsoft Excel file contains three tabbed worksheets:

- **Added Successors** – a new succession candidate is added
- **Removed Successors** – an existing successor is deleted
- **Changed Successors** – an existing successor is 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 Prog	James	Douglas		
3	3	131	Intern Prog	Kinder	Smith		
4	3	9	Applicator	Kayla	Melton		
5	1	3	Informator	Ki	Wang		
6							
7							
8							
9							
10							
11							
12							
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29							

Figure 36.

1. Click the Generate a Change Report button  in the what-if planning chart.
2. Select the **Export Change Data** tab in the Change Report Options dialog.



**Figure 37.**

3. Select the associated check box for each field you want to include.
4. Click **Generate** to produce the Excel file with the selected fields. Excel opens the spreadsheet with three tabs.

**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 report.

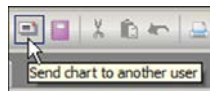
## Distributing Charts and Change Reports

OrgPublisher what-if succession planning charts and change reports are distributed by the planner. The change report can be sent to Excel and then printed or emailed to another person.

You can find more information in the OrgPublisher Print and PowerPoint document.

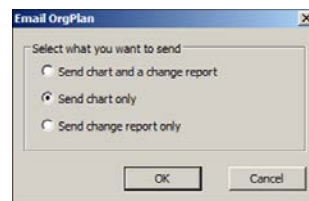
### Sending the Chart and Change Report

1. Click the Send chart to another user button in the planning chart.



**Figure 38.**

2. In the Email OrgPlan dialog, select the items you want to send and click **OK**.



**Figure 39.**

- The files are attached and directions on how to view them are added in the email message. Type the email address and click **Send**.

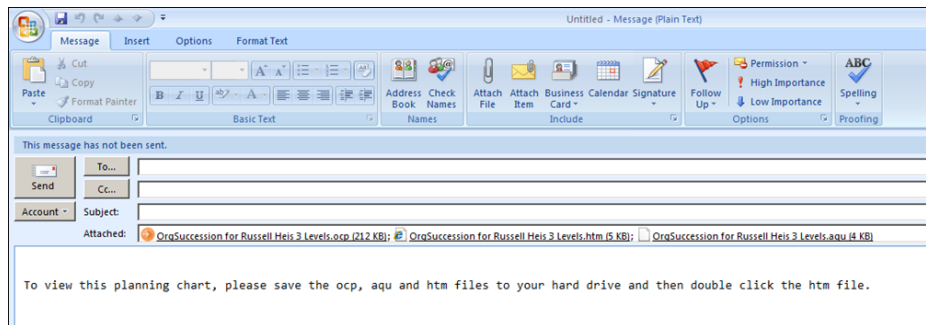


Figure 40.