Insperity® OrgPlus® RealTime
User Guide

Planning Basics

08/2020

OrgPlus®RealTime User Guide to Planning

This guide will provide a brief explanation of the key features of the Insperity OrgPlus planning module:

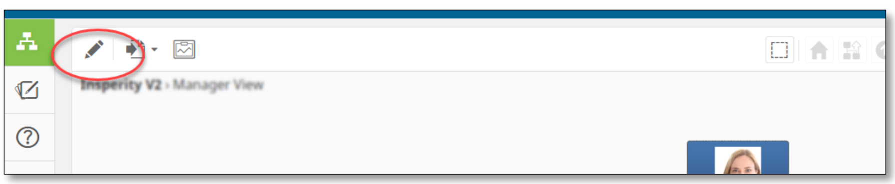
Planning Overview

The planning module in Insperity® OrgPlus® RealTime is a key tool in modeling "what if" scenarios for potential organizational changes such as new hires, employee promotions, terminations, and salary adjustments. When creating plans, you create a snapshot of the current organization areas you manage and can drag and drop, delete, and change information on the boxes and profile cards reflecting proposed strategic decisions within your department.

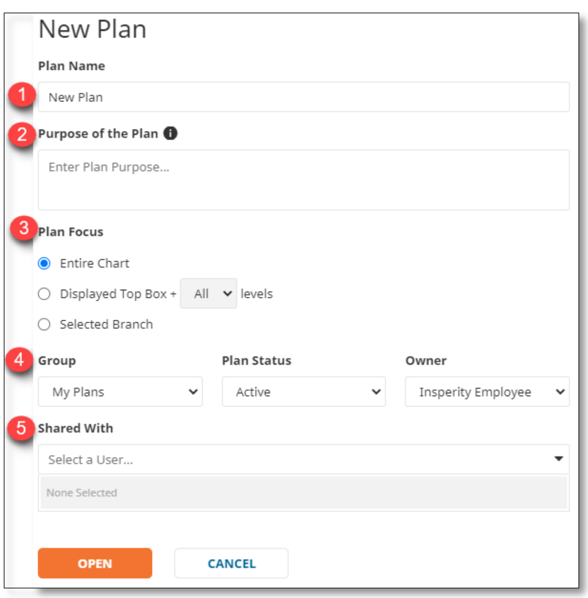
It is important to note that planning does not affect the actual organizational chart.

Creating a New Plan

To create a new plan, select the **New Plan** icon that is shown at the top left of your charting space. If you do not have planning permissions, you will not have the icon on your charting space.



A new window will appear where you will set your plan properties:

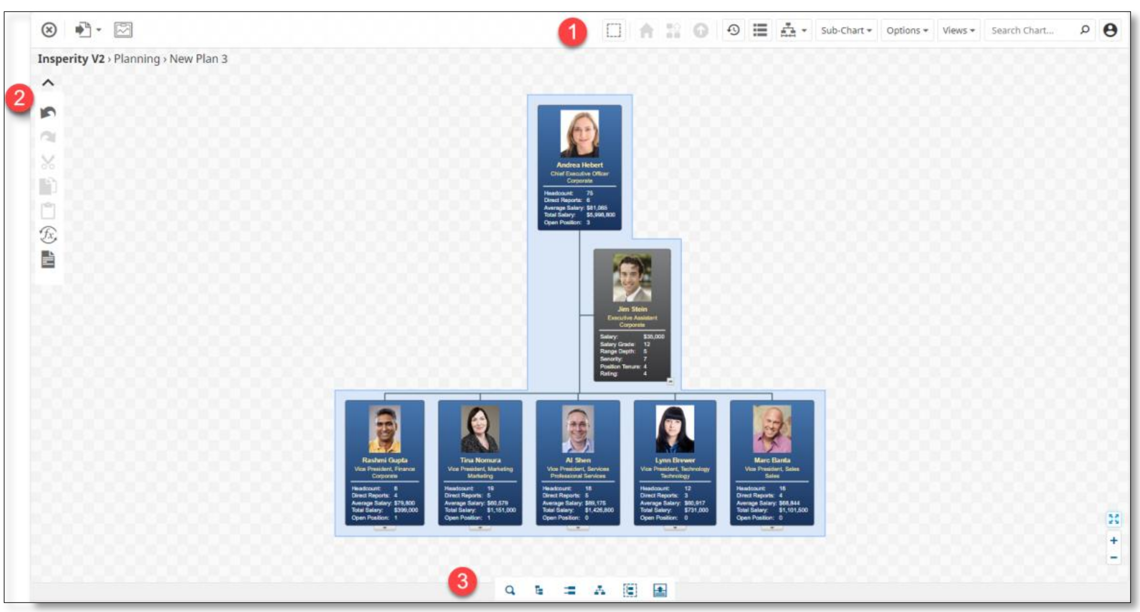


1. **Plan Name**: You will need to provide a name for your new plan, such as "Sales 2021". This will allow you to easily identify the plan you need from a list of plans.
2. **Purpose of the Plan**: You can add details about the purpose of the plan or items specific to this plan.
3. **Plan Focus**: You can choose which part of the chart you would like to plan for based on the selections under plan focus. Please note that the administrator may have set up planning limits to your profile such as only being able to plan for your direct reports.
4. **Group**, **Plan Status**, and **Owner**: These set various categorizations for your plan.
5. **Shared With**: If you would like to allow others to have access to the plan, select the name in this section. Only users who have access to planning will be included in this list. Please note that the administrator may have set up users with planning limits.

Once you have set your plan properties, click **Open** to enter planning mode.

Navigating the planning module

In planning mode, your chart will have a checkered background. Areas of the chart with the blue outlined background are editable sections based on your permissions.



1. The same chart navigation tools that are in charting space are also in the planning module allowing you to print, change views, change branch styles, and modify sub-chart levels while in planning.
2. New icons will appear on the left-hand side of the planning chart and help you with functions such as cutting, pasting, undoing changes made, and recalculating formula fields displayed on the chart.

3. Additional secondary workspace tools will display at the bottom of the page.

Making Changes in Your Plan

Editing an Employee's Information and Adding Direct Reports

In the planning mode, you will have several additional buttons on each of the employee's boxes to allow you to make modifications to their information as well as add new boxes in your organization.

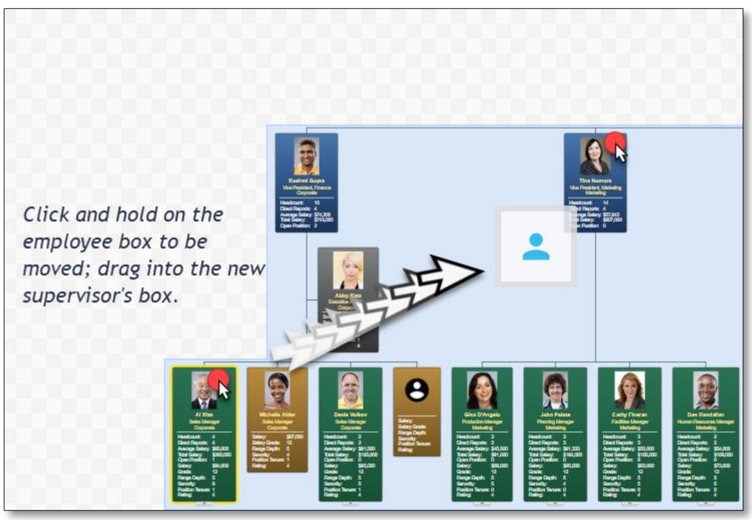
<table>
<tr><td rowspan="6">
</td><td></td><td>Edit: This allows you as the planner to edit the existing information that is displayed on the face of the box. Once you have made the necessary changes, you will click OK. Note: Calculated fields such as headcounts, totals, and averages cannot be edited. Calculated fields will update based on the updates to the inputs.</td></tr>
<tr><td></td><td>Employee Note: This icon will allow you to add notes about the employee. This is useful in cases where you would like to note why a change has been made or any other comments about the employee.</td></tr>
<tr><td></td><td>Add Team Member: This allows the planner to add a team member to the chart as a direct report. Once the planners adds a team member, a new box will display and you will be able to add information such as salary to the new box.</td></tr>
<tr><td></td><td>Add Assistant: If the organization is set up to show assistants in an assistant format, then this icon will add a new employee as an assistant.</td></tr>
<tr><td></td><td>Delete: This icon will delete the employee box, which will reflect as a termination of the employee.</td></tr>
<tr><td></td><td>Profile Card: This icon will display the profile card for the employee. You can edit information in the profile card by using the edit icon.
</td></tr>
</table>

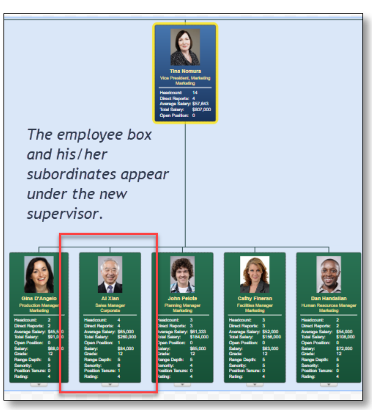
Moving Employees Within the Chart

You can manually model changes to your organizational structure using several different methods:

Drag-and-drop to new supervisor: Reassign an employee (and his/her subordinates) to a new supervisor by 'dragging-and-dropping' the employee box in the new supervisor's box.

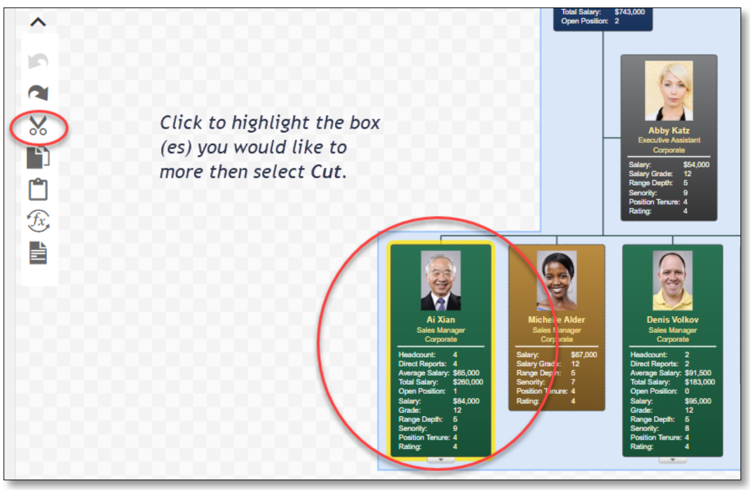
If you would like to move a group of employees, you can **Ctrl+ Click** each employee box or use the **Marquee** icon at the top of the chart.

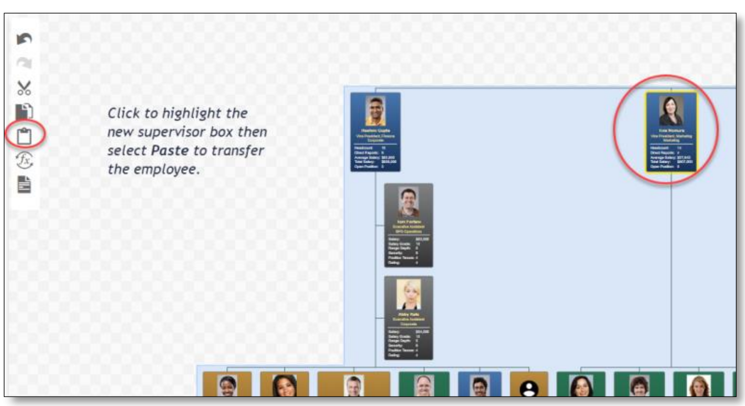




Cut and paste to a new supervisor: Use the **Cut** option (scissors icon) to remove an employee from one supervisor and **Paste** under another supervisor.

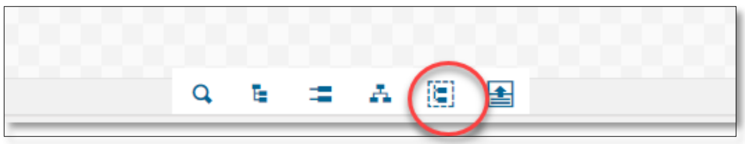
If you would like to move a group of employees, you can **Ctrl+ Click** each employee box or use the **Marquee** icon at the top of the chart.



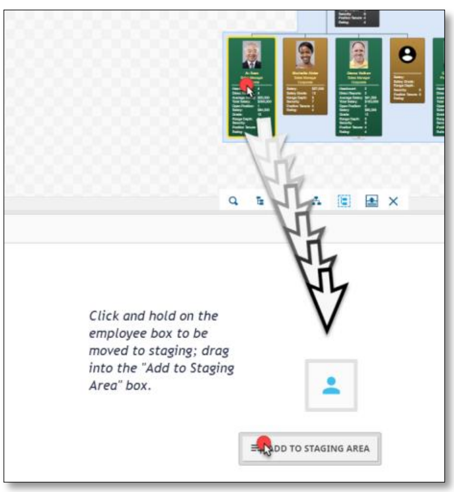


Holding the employee in the **Staging Area**: Drag-and-drop an employee box for later reassignment (his/her reports follow into the Staging Area).

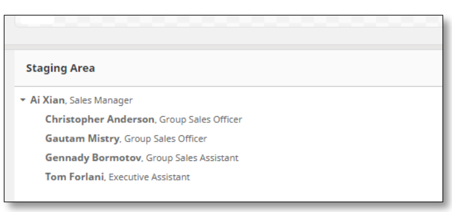
In the planning mode, you can use the **Secondary Workspace** as you did in your charting space.



 **Staging Area**: Click on this icon to display the staging area. This is where you can move employees when they are going to be deleted from the planned organization, or when you would like to move them to a different supervisor. The staging area is a holding spot for further consideration of the employee without deleting them from the chart plan.

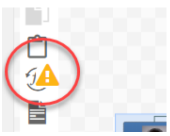


The employee will be held in this area until any additional actions are performed such as dragging and dropping back into the chart. Note that if the employee has any reports, the reports will be included in this staging area.



Updating Calculated Fields (Headcount, Total Salaries, Etc.)

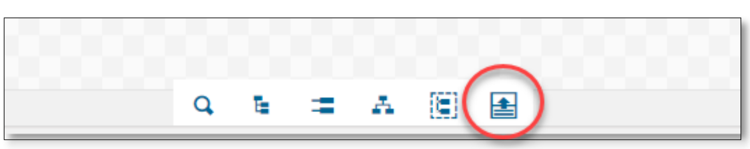
When you are in a View that contains formula fields and you move, add, or delete employees or if you edit number fields such as salary, you may need to click **Recalculate Formulas** to update displayed formula field calculations.



For example, we have moved two people under a new manager and now we must recalculate the headcount and salaries for the manager:

Tracking and Reporting Changes

You can create a report on the changes you have made to your team. In the planning mode, you can use the Secondary Workspace as you did in your charting space. You can access your Secondary Workspace with the icon menu at the bottom of your screen:



Track Changes, when clicking on this icon, will display all the changes that you have made in your plan.


Track Changes

Action	Name	Title	Person ID	Effective Date	Last Modified	Last Modified By
Transfer	Lindsey Douglas	Services Coordinator	4001		8/7/20 2:52 PM	Insperity@employee.com
Transfer	Michelle Alder	Sales Manager	1418		8/7/20 2:51 PM	Insperity@employee.com

Click on the plus sign + next to the change to see additional information.

Use the **Settings** icon to establish the fields you would like to display in track changes:

Use the **Change Report** icon to view your changes in a report.

Sharing Your Plan Model and Exporting Data

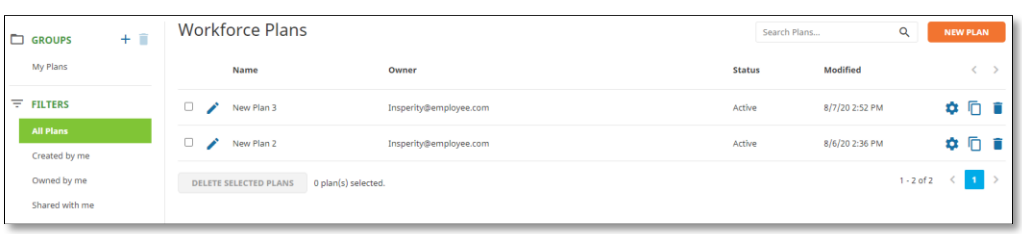
As in your charting space, you can print your chart to PowerPoint or PDF. To export the plan data in Excel, choose the Excel option when sharing.

Closing Your Plan

When you are finished with planning, and want to return to your charting space, close out of planning by clicking on the **Close** icon at the top left-hand side of your charting space.

Managing Plans

Once you have created and saved a plan, you can manage this plan by choosing the **Manage Plans** icon on the left side of your charting space. The screen below will be displayed. You will find a list of any plans created by you, owned by you, or shared with you. On the left-hand side of the screen you will see the options to organize and locate your plans.



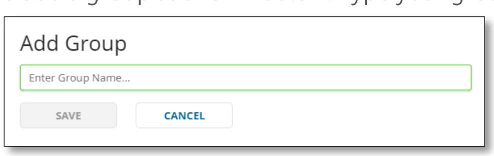
To edit an existing plan, select the **Edit** icon.

To change the properties of an existing plan, such as the name of the plan, the owner, and who it is shared with, select the **Properties** icon.

To copy a plan to use as a basis for a new plan, select the **Copy Plan** icon.

To delete a plan, use the **Delete Plan** icon.

To organize your plans, you can create **Groups**. To create a **Group,** click on the plus sign. This will open the **Add Group** panel to add a group as shown below. Type your group name and then click **Save**.



You can organize plans into the new groups. To add plans a new group, click on the **Properties** icon to the right of the plan. The **Plan Properties** panel will display. Click on the **Group** dropdown to select the new group name and then click **Save**.