

Insperity® OrgPlus® RealTime - Succession Planning Setup

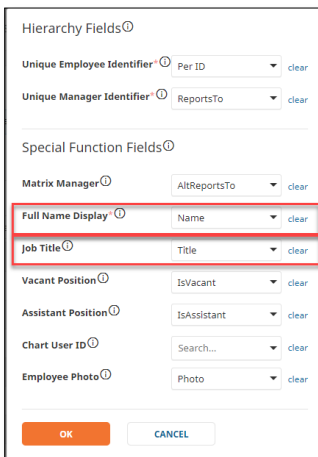
First Time Configuration Setup for Succession Planning

Field Mapping

When using succession planning for the first time, mapping the fields that drive the module need to be mapped in **Fields Management**. Identifying which field is being used for the employee's full name is required and the field that contains the job title is strongly recommended.

To map the full name and job title field, go to **Administration > Fields > Hierarchy & Special Functions Fields**.

Under **Special Function Fields** select the field that will be used from your employee data source that will match to the Full Name Display and to the Job Title.



The screenshot shows a configuration window titled "Hierarchy Fields". It is divided into two main sections: "Hierarchy Fields" and "Special Function Fields".

- Hierarchy Fields:**
 - Unique Employee Identifier: Per ID (dropdown), clear
 - Unique Manager Identifier: ReportsTo (dropdown), clear
- Special Function Fields:**
 - Matrix Manager: AltReportsTo (dropdown), clear
 - Full Name Display: Name (dropdown), clear (highlighted with a red box)
 - Job Title: Title (dropdown), clear (highlighted with a red box)
 - Vacant Position: IsVacant (dropdown), clear
 - Assistant Position: IsAssistant (dropdown), clear
 - Chart User ID: Search... (dropdown), clear
 - Employee Photo: Photo (dropdown), clear

At the bottom of the window are two buttons: "OK" (orange) and "CANCEL" (white).

Select **OK** and then **Save** to save the field mappings.

Role Permissions Configuration

All non-role-based full administrators will have access to succession planning. To add succession planning to any full user that has a role assigned to them, assign succession planning in the role definitions through the **roles properties**.

Go to **Administration > Roles**. You can add a new role or edit an existing role. To assign succession planning permissions to any role, check the box for succession planning under **Features** in the role properties.


Features
Establish what features the role has access to

<input type="checkbox"/> Administration	<input checked="" type="checkbox"/> Sharing	<input type="checkbox"/> Add/Edit Chart Text Box
<input type="checkbox"/> Organization Management	<input checked="" type="checkbox"/> PDF	<input checked="" type="checkbox"/> Workforce Planning
<input type="checkbox"/> Views	<input checked="" type="checkbox"/> PowerPoint	<input type="checkbox"/> View Workforce Plans as Read Only
<input type="checkbox"/> Roles	<input checked="" type="checkbox"/> Excel	<input checked="" type="checkbox"/> Add/Edit Workforce Plans
<input type="checkbox"/> Filters	<input checked="" type="checkbox"/> HTML	<input checked="" type="checkbox"/> Succession Planning

Click **Save** when finished.

Assigning a Role to a User

If an existing role was modified to include succession planning, any user already assigned to the existing role will be updated to include the new permission.

If a new role was created, you can add this role to the user to customize their permissions by going to **Administration > Users**. Click the pencil  icon to edit the user. Add the role under **Select a Role**. Then **Save**.

Select a Role

Search...

- Administrator
- [Chicago One Corporation - Demo] Directory
- [Insperity V1] Directory
- [Insperity V2] Mgr Rolw