



# OrgPlus RealTime: Workspace & Plan

# Topics Covered




- **Workspace & Plan**
  - Access and navigate the chart
  - Use the tree view and search panel
  - Change the look of your chart
  - Understand Views and how to select them
  - Export the chart as displayed
  - Start a new plan
  - Track Changes
  - Manage Plan


# Dashboard


The dashboard will be displayed at sign on.


There are three sections of the dashboard. The first section, Notifications, will display items that have changed since your last access of OrgPlus RealTime. The second section, Common Tasks, provides quick access to screens of OrgPlus RealTime. The third section, Statistics, displays information about how many users and boxes are being utilized, and when the last refresh of data was.


## Common Tasks


 All users will see the workspace icon to take the user into the charting space.

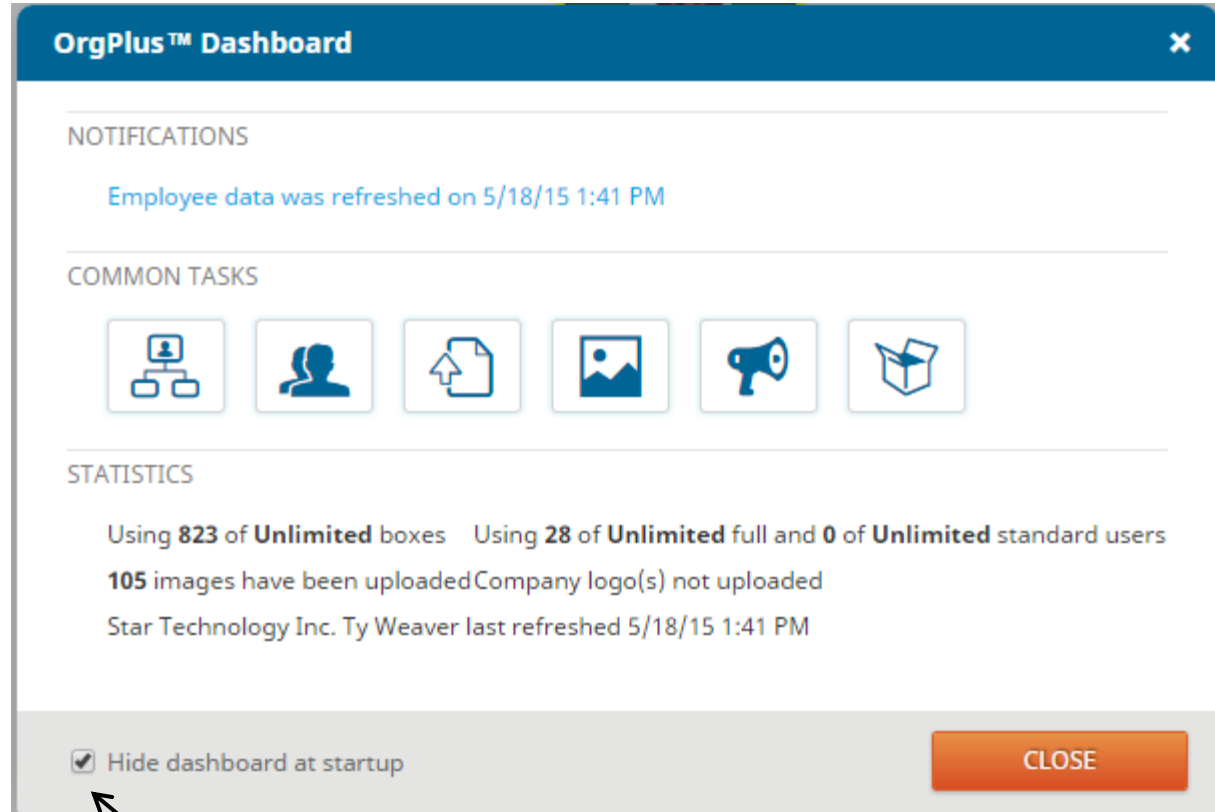
 Only users who have been granted access to add new users will see this icon that will take the user to the administration screen.

 Only users who have been granted access to refresh chart data will see this icon. This icon will take the user to the administration screen.

 Only users who have the role of administrator will see this icon. This icon will allow you to upload photos into the charting space.

 All users will see the feedback icon. This will take the user to the Feedback screen where they can provide suggestions about OrgPlus RealTime.

 All users will see the What's New icon. This will take the user to the What's New page which will show information about the most recent changes to OrgPlus RealTime.



OrgPlus™ Dashboard

NOTIFICATIONS

Employee data was refreshed on 5/18/15 1:41 PM

COMMON TASKS

STATISTICS

Using 823 of **Unlimited** boxes   Using 28 of **Unlimited** full and 0 of **Unlimited** standard users

105 images have been uploaded Company logo(s) not uploaded


Star Technology Inc. Ty Weaver last refreshed 5/18/15 1:41 PM

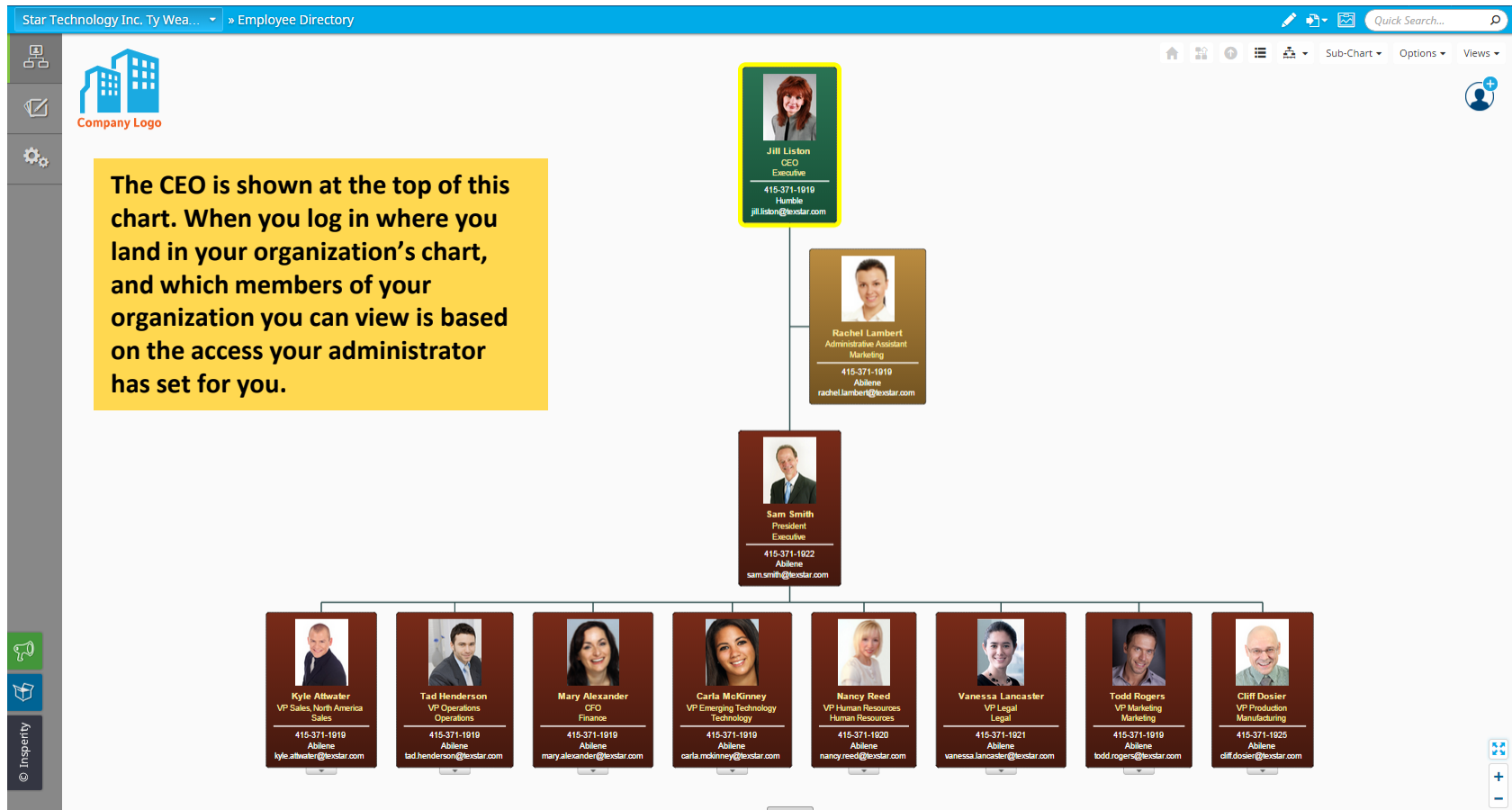
Hide dashboard at startup

CLOSE

If you do not want to see the dashboard when you sign on, check this box.

# Workspace – Chart

When the user clicks on the  chart icon on the Dashboard, or if the user has chosen to hide the dashboard when they log into OrgPlus RealTime the screen below will display. This is the Workspace area of OrgPlus RealTime where the user can view their organization in a chart view, tree view, or advanced search view.



Star Technology Inc. Ty Wea... » Employee Directory

Company Logo

Quick Search...

Sub-Chart Options Views

The CEO is shown at the top of this chart. When you log in where you land in your organization's chart, and which members of your organization you can view is based on the access your administrator has set for you.

**Jill Liston**  
CEO  
Executive  
415-371-1919  
Humble  
jill.liston@textstar.com

**Rachel Lambert**  
Administrative Assistant  
Marketing  
415-371-1919  
Abilene  
rachel.lambert@textstar.com

**Sam Smith**  
President  
Executive  
415-371-1922  
Abilene  
sam.smith@textstar.com

**Kyle Altwater**  
VP Sales North America  
Sales  
415-371-1919  
Abilene  
kyle.altwater@textstar.com

**Ted Henderson**  
VP Operations  
Operations  
415-371-1919  
Abilene  
ted.henderson@textstar.com

**Mary Alexander**  
CFO  
Finance  
415-371-1919  
Abilene  
mary.alexander@textstar.com

**Carla McKinney**  
VP Emerging Technology  
Technology  
415-371-1919  
Abilene  
carla.mckinney@textstar.com

**Nancy Reed**  
VP Human Resources  
Human Resources  
415-371-1920  
Abilene  
nancy.reed@textstar.com

**Vanessa Lancaster**  
VP Legal  
Legal  
415-371-1921  
Abilene  
vanessa.lancaster@textstar.com

**Todd Rogers**  
VP Marketing  
Marketing  
415-371-1919  
Abilene  
todd.rogers@textstar.com

**Cliff Dosier**  
VP Production  
Manufacturing  
415-371-1925  
Abilene  
cliff.dosier@textstar.com


© Insperty

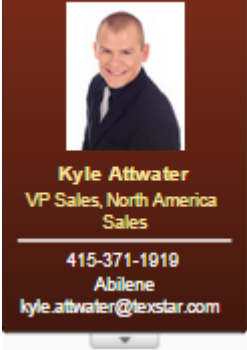
# Workspace - Chart

You can zoom in and out on your charting space by using the scroll wheel on your mouse.

You can also use the zoom icons at the bottom right hand side of your charting space.



-  This icon is the Fit to Window icon. If you have zoomed in on your chart and want to reset the chart where you can see all of the boxes for the displayed levels, click on this icon.




**Kyle Attwater**  
VP Sales, North America  
Sales

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415-371-1919  
Abilene  
kyle.attwater@texstar.com

On each employee's box when there are levels below that employee not currently being displayed there will be a down arrow at the bottom of their box. Clicking on that down arrow will display the next level below that employee.



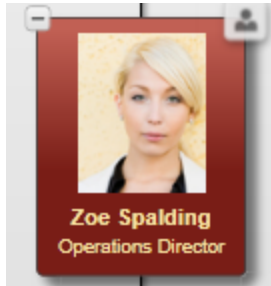
**Kyle Attwater**  
VP Sales, North America  
Sales

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415-371-1919  
Abilene  
kyle.attwater@texstar.com

On each employee's box when there are levels above that employee not currently being displayed there will be an up arrow at the top of their box. Clicking on that up arrow will display the next level above that employee.

# Workspace – Chart



At the top left of the employee's box there will be a minus sign displayed if there are subordinate levels displayed below that employee. If you click on

the minus sign, all subordinates below that employee will be hidden.



At the top left of the employee's box there will be a plus sign displayed if there are subordinates that have been hidden. If click on the plus sign, the hidden subordinates will be displayed.

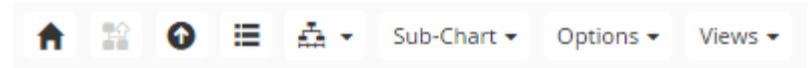
The profile icon is at the top right of each employee's box. Click on that icon to view that employee's Baseball Card which is a profile header and one or more profile bodies. The Baseball card is shown below.



A 'Baseball Card' for Zoe Spalding. It features a circular profile picture at the top, followed by her name 'Zoe Spalding' and title 'Operations Director Executive'. Below this is a table of contact and address information.

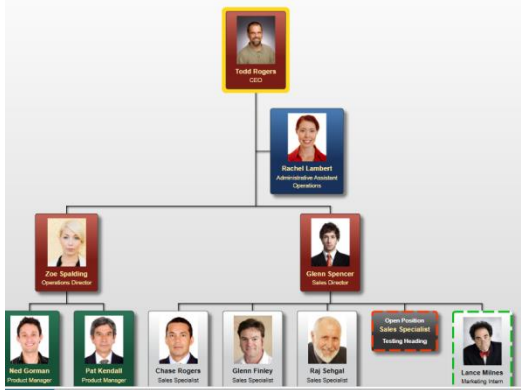
Work Phone:	415-371-1919
Extension:	x14490
Work Email:	<a href="mailto:zoe.spalding@marin...">zoe.spalding@marin...</a>
Personal Phone:	510-354-9012
Street:	121 Kearny Street, St...
City:	San Francisco
State:	CA
Zip Code:	94.109


# Workspace – Chart

At the top right hand side of the screen above your charting space are several icons to assist you with navigation of your chart, and provide you with additional information about your chart.



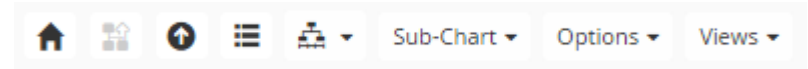
-  This icon will return you to your starting point. If you drill down several levels in your organization, and want to return to your starting point when you signed in you can click on this icon.
-  This icon will make an individual the top of your organization. For example, in our chart below if you would like Zoe Spalding to be the top box in your organization instead of the CEO Todd Rogers when you click on Zoe's box, and then press this icon the chart would change to the chart on the right.




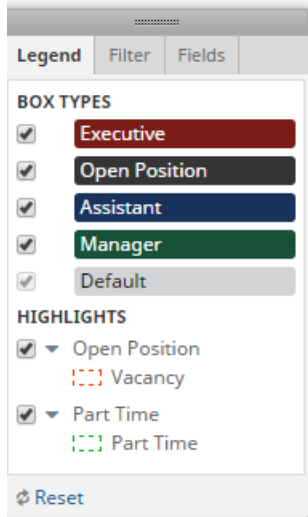
-  This icon will move you up one level in your organization chart. For example, if Ned was displayed as the top box in your chart and then you pressed this icon the chart to the far right showing his supervisor and all of the other branches for his supervisor would be displayed.



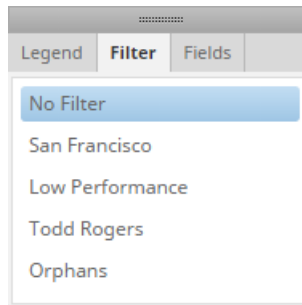
# Workspace – Chart



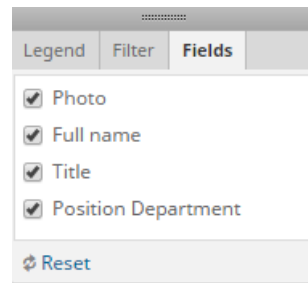
 This icon will display the Control Panel on the right hand side of your screen in your charting space.



The first tab of the control panel, Legends, will provide information about this view. Each of the box types will be displayed with their titles. Below that the highlights being shown in the charting space will be explained.



The second tab of the control panel, Filter, will provide filters that can be utilized in your chart. When a filter is applied, it will by default mute all of the boxes that do not meet the filter criteria, and maintain the hierarchy. At the bottom of the filter panel, you can choose to hide others instead. This will apply the filter, and hide any boxes that do not meet the criteria, and the organizational hierarchy will not be maintained.

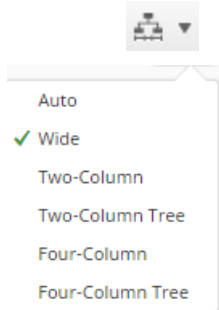
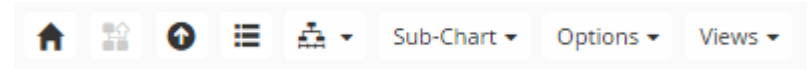


The third tab of the control panel, Fields, will display the fields being shown in the organizational chart. You can uncheck the box in front of the field name if you do not want that field displayed on your chart. You can recheck the box to add the fields back to the boxes in the organizational chart. If you deselect several boxes and want to quickly redisplay them, you can click on Reset at the bottom left. This will put all of the fields back into the boxes in the organizational chart.

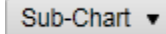
To hide the control panel from view once it is displayed, click on the same Control Panel icon  again.



# Workspace – Chart



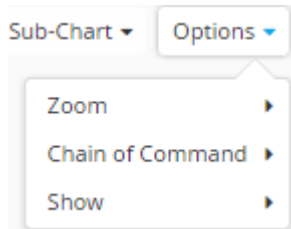
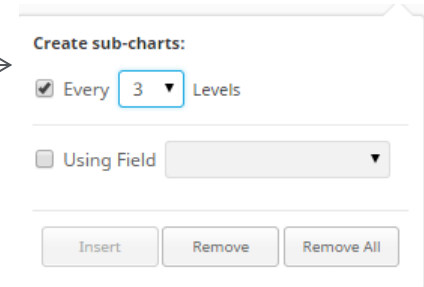
This icon will allow you to choose how you would like your chart to be displayed. When you click on the dropdown arrow on the right side of the icon, this list will be displayed. You can click on any of the choices to display your organization with that branch style.




This icon will allow you to decide how to create sub-charts in your organization. Sub-charting can be done based on the number of levels or any field that is part of the current view. When you click on the dropdown arrow, you will see the options of using levels or fields.

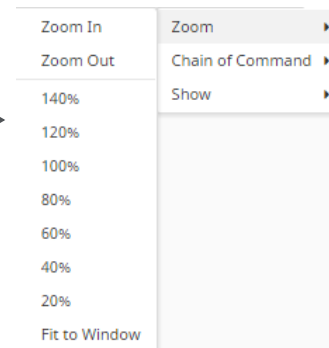
Once you select the number of levels, or the field to be used click on Insert. Your chart will now reflect your selection.

To remove the sub-chart breaks come back to the Sub-Chart icon and select Remove All.



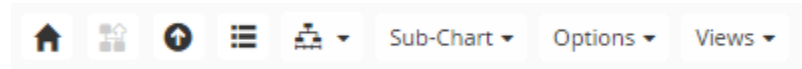
There are several items under the Options icon. When you click on the dropdown menu you will see Zoom, Chain of Command and Show.

When you select Zoom, the following choices will be displayed. You can use this zoom functionality instead of the zoom icons. Also, the same fit to window functionality as can be accessed with the  icon at the bottom right hand side of your screen is available here.

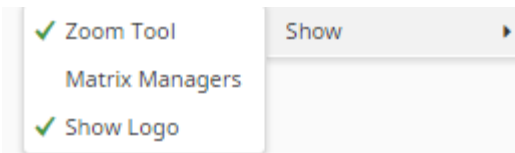
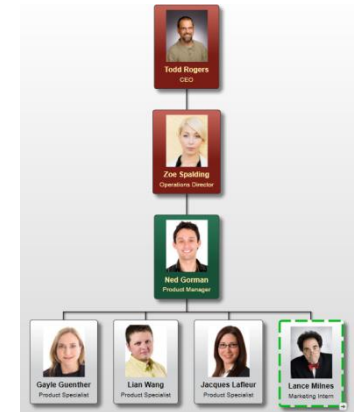
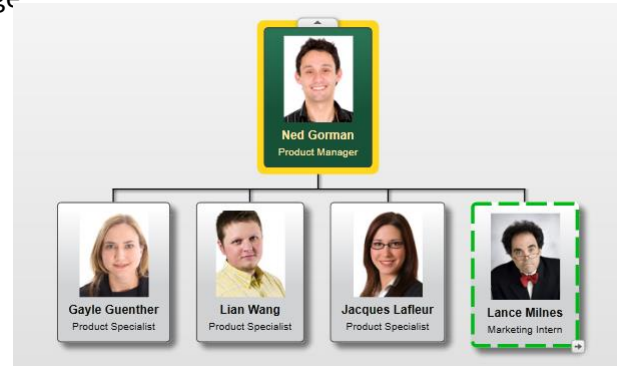


# Workspace – Chart

When you select Chain of Command, the following choices will be displayed. This is useful to show the direct chain of command when you have drilled down into your organization in your charting space. Choosing 1 level up will show the supervisor's box of the person you are currently positioned on. The difference between this and the Up One Level icon is that this function will only show the direct hierarchy. None of the other branches under the supervisor will be displayed. On the right is an example of this. In the first image Ned is displayed as the top of our organization. Then we select 2 Levels Up, and the second image shows how now we are seeing that direct hierarchy of 2 additional levels above Ned without any of the other branches under those supervisors. Once you have applied this to remove that hierarchy above Ned from being displayed, select Off.

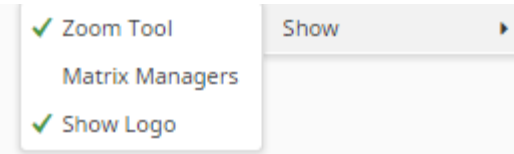
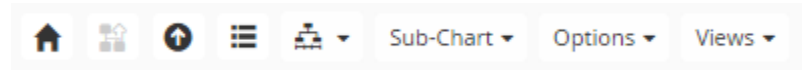


- ✓ Off
- All Levels Up
- 1 Level Up ←
- 2 Levels Up
- 3 Levels Up
- 4 Levels Up



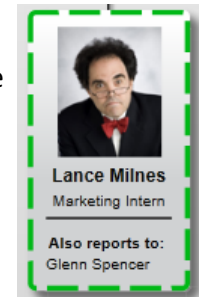
When you select Show on the Options dropdown menu, you will see the Zoom Tool, Matrix Managers and Show Logo options displayed. If you do not want to display the zoom tool icons on the bottom right hand side of the screen in your chart space, you can deselect it by clicking on Zoom Tool. To put the zoom tool icons back on your screen you would come to Zoom Tool and click on it again.

# Workspace – Chart



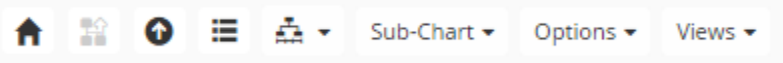
The next option here is to Show Matrix Managers. If you have employees who report to more than one supervisor in your organization that will be shown in your organizational chart with an arrow at the bottom right of the employee's box as is shown to the right. To see the other manager's name, you will click on that arrow at the bottom right. When you publish your charts the other supervisor's name will not be shown on the report.

To see the other supervisor's information as part of the employee's box which will then be displayed on your published charts, you would select it here by clicking on Show Matrix Managers. Once you have selected Show Matrix Managers the employee's box with more than one supervisor would appear with both supervisor's information as is shown to the right. If you would like to revert back to the additional supervisor being shown using the arrow instead of being displayed in the box, you would come back to Show Matrix Managers and click on Matrix Managers to deselect it.



The last option here is to Show Logo. If a company logo has been uploaded by the administrator in the domain, the log will be displayed at the top left hand side of the charting space, and at the top left hand side of all of your published charts. If you do not want the logo to be displayed on your on screen charting space and your exported charts, deselect Show Log by clicking on the option under Show. If you would like the logo to be displayed at a later time, come back to Options, Show and Show Logo and click on Show Logo to select it.

# Workspace – Chart



Views ▾

**Classic**  
Name, Title

**Workforce Planning**  
Name, Title, Key Emp, Tenure, Last Promo, Loc w/in Salary Grade, Perf Score

**Compensation**  
Name, Title, Salary, Salary Grade, Loc w/in Salary Grade, SOC, Headcount, Bud Salary, Total Salary,

**EE/Management Ratio**

**Category Counts**  
Name, Title, Emp Type, FT Roll Up, PT Roll Up

**Contact Plus**  
Name, Title, Emp ID, Work Location, Work Phone, Email

**FLSA Counts**  
Name, Title, FLSA Status and Counts

**HR Details**  
Name, Title, Employee ID, Hire Date, Gender, Ethnicity, Employee Status, Employee Type,

**Open Count**  
Name, Title, Count of Filled Positions, Count of Open Positions

**Perf & Potential**  
Name, Title, Performance Score, Potential Rating

**SOC**  
Name, Title, SOC, Headcount, Layer

**SOC Average**  
Name, Title, SOC, Layer, Average SOC Subs

**SOC Bounds**  
Name, Title, Headcount, SOC, Layer, Average SOC Subs, highlights

**SOC Cost to Manage**  
Name, Title, SOC, Cost to Manage

When you click on the Views dropdown a list of all of the available views for your charting space will be displayed. Views will decide what information is being shown in the boxes in your organization's chart. To select a new view, click on the view name.

Legend Filter Fields

BOX TYPES

- Manager
  - Over Approved
  - Headcount
  - > Approved
  - Low Performance
  - High Performance
- Open Position
- Default
  - Low Performance
  - High Performance

HIGHLIGHTS

- Salary vs. Performance
  - Flight Risk
  - Needs Coaching
- Promotion Potential
  - Highly Eligible
  - Eligible

Reset

To better understand the information shown in a view refer to the legend tab of the control panel. This legend will show the different box types for the view as well as explain any highlights being shown in your organization's chart.

Each view will have one profile header, and one or more profile bodies associated with it. That profile information is displayed on the right hand side of the chart if you click on the Profile icon.



To see a different employee's information in the Profile panel, click on that employee's box in the organization chart. When more than one profile body is associated with a view they will stack on one another as is displayed on the right hand side with the Contact Info and Salary Info profile bodies. The profile header and bodies displayed


at the top right hand side of the screen are the same as the baseball card of the employee displayed by clicking on the Profile icon on the top right of each employee's box.

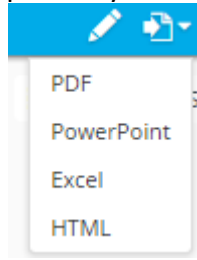
Zoe Spalding  
Operations Director  
Executive

Contact Info	Salary Info
Work Phone:	415-371-1919
Extension:	x14490
Work Email:	zoe.spalding@marin...
Personal Phone:	510-354-9012
Street:	121 Kearny Street, St...
City:	San Francisco
State:	CA
Zip Code:	94.109

What views are available to each user in OrgPlus RealTime is controlled by the access granted to that user in their user role by their administrator.

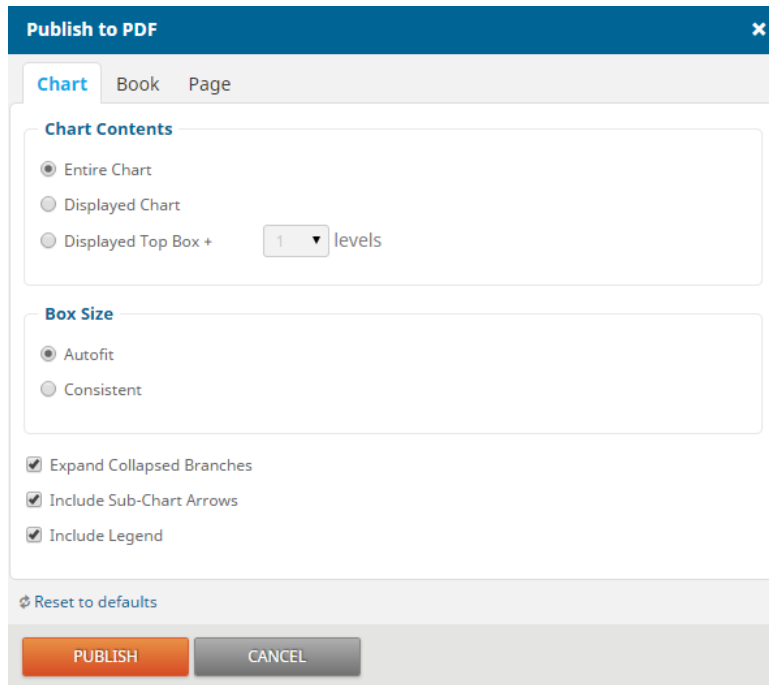
# Workspace – Chart – Publishing Options

At the top right hand side of the screen above your charting space is a share icon.  This share dropdown is where you will be able to publish your chart in different formats.



When you click on the Share dropdown arrow, you will see the four publishing options displayed: PDF, PowerPoint, Excel, and HTML. When utilizing the PDF, PowerPoint and Excel publishing options there are publishing menus that allow you to make choices about how to format the chart when printed as well as which boxes to include when publishing.

**Note:** The page breaks for your published charts will be based on the Sub-chart options that are currently selected in your onscreen charting space.

A screenshot of the 'Publish to PDF' dialog box. The dialog has a title bar 'Publish to PDF' with a close button. Below the title bar are three tabs: 'Chart' (selected), 'Book', and 'Page'. The 'Chart' tab is active, showing 'Chart Contents' and 'Box Size' sections. Under 'Chart Contents', there are three radio button options: 'Entire Chart' (selected), 'Displayed Chart', and 'Displayed Top Box +' with a dropdown menu set to '1' and the text 'levels'. Under 'Box Size', there are two radio button options: 'Autofit' (selected) and 'Consistent'. At the bottom of the dialog, there are three checked checkboxes: 'Expand Collapsed Branches', 'Include Sub-Chart Arrows', and 'Include Legend'. A 'Reset to defaults' link is also present. At the very bottom, there are two buttons: 'PUBLISH' and 'CANCEL'.

The PDF, PowerPoint and Excel publishing menus allow you to decide whether to publish the entire chart, just the chart currently displayed on your screen, or the displayed top box on your screen and however many additional levels you would like published.

The Book tab on the PDF and PowerPoint publishing menus allows you to make decisions about a cover page, table of contents, and index page.


The Page tab allows you to make decisions about margins and paper size.


In the PowerPoint publishing menu on the Page tab, you have the opportunity to upload a template to be used when publishing your chart.

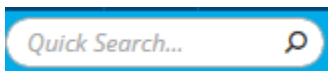
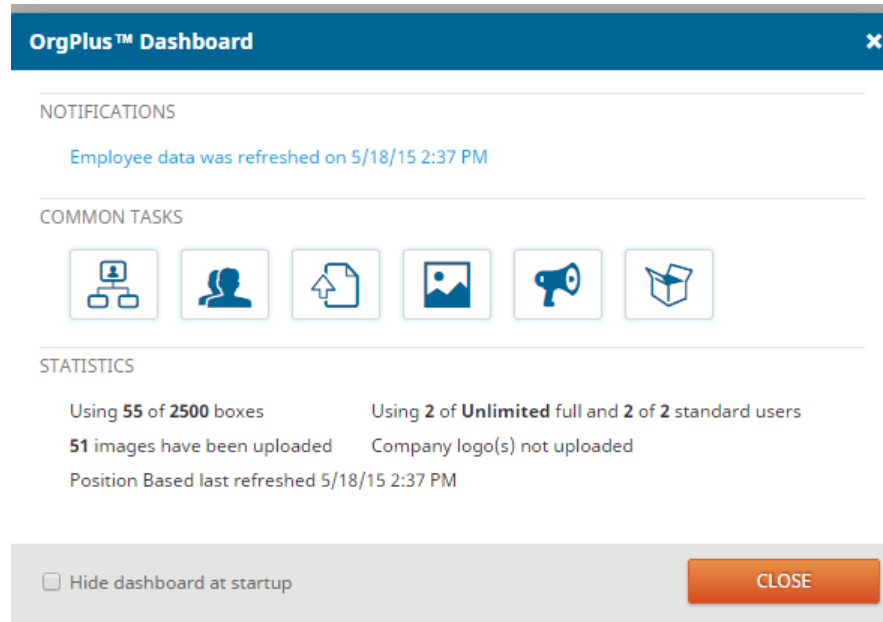
In the Excel publishing menu, you have the opportunity to choose which fields from the chart view will be included on your published spreadsheet.

# Workspace – Chart



At the top right hand side of the screen to the right of the publishing options is the Show Dashboard icon , and the Quick Search field.

Clicking on the dashboard icon  will show the same dashboard that was displayed at log in.



This quick search field will allow you to find a particular employee in your chart.

# Workspace – Tree View

To access the tree view of your organization, click on the up arrow at the bottom center of your charting space. Then click on the Tree icon at the left hand side of the bottom half of your screen.




Search in Tree view





- ▼ **Todd Rogers**, <Job Title>, CEO 18 boxes
  - ▶ **Glenn Spencer**, <Job Title>, Sales Director 6 boxes
  - ▶ **Rachel Lambert**, <Job Title>, Administrative Assistant
  - ▶ **Zoe Spalding**, <Job Title>, Operations Director 10 boxes

Double click on any employee in the tree view to highlight their box in the chart in the top half of your screen.


When you initially show the tree view only the top most person in your organization will be shown. Click on the gray arrow to the left of the employee's Name to see the next level below that employee.

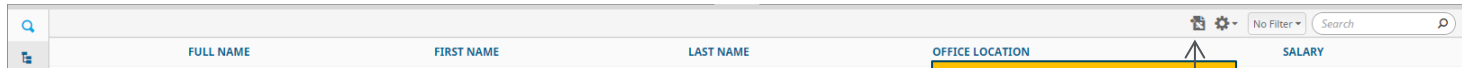
Clicking on this icon  will allow you to export this list of employees to Excel.

Clicking on this icon  will show the orphan records (meaning the employee record is not attached to a supervisor). Clicking on this icon again will hide the orphan records.

Clicking on this icon  will show the number of boxes currently in your organization's chart. Clicking on this icon again will hide the box count.


# Workspace – Search View


To access the Search view of your organization, click on the up arrow at the bottom center of your charting space. Then click on the Search icon at the left hand side of the bottom half of your screen. 



FULL NAME	FIRST NAME	LAST NAME	OFFICE LOCATION	SALARY
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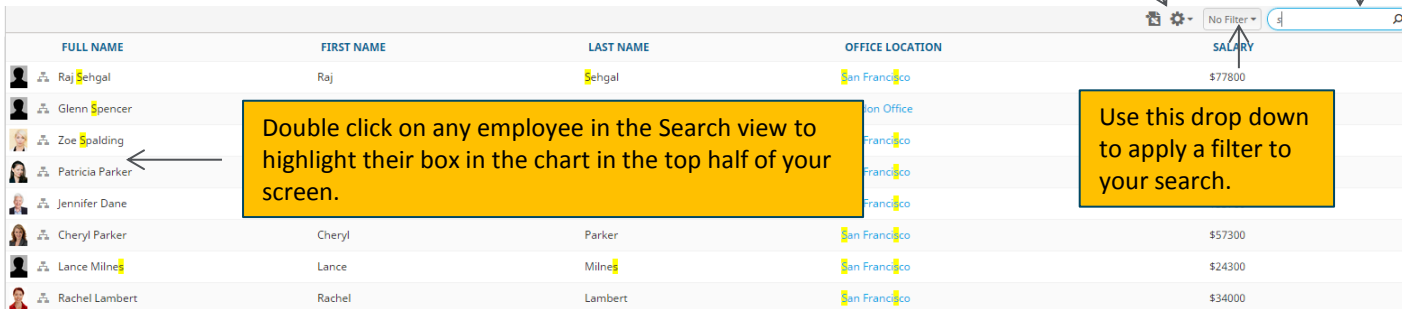
Which fields are displayed for each employee in the Search view is determined by your administrator in the setup of your company's Domain.









Clicking on this icon  will allow you to export this list of employees to Excel.

Under  you can choose whether to show employee pictures in the left hand column, and you can choose whether to show highlight matching search strings when doing a search.

- Show pictures
- Highlight searches

Search for employee



FULL NAME	FIRST NAME	LAST NAME	OFFICE LOCATION	SALARY
 Raj Behgal	Raj	Behgal	San Francisco	\$77800
 Glenn Spencer			San Office	
 Zoe Spalding			Francisco	
 Patricia Parker			Francisco	
 Jennifer Dane			Francisco	
 Cheryl Parker	Cheryl	Parker	San Francisco	\$57300
 Lance Milne	Lance	Milne	San Francisco	\$24300
 Rachel Lambert	Rachel	Lambert	San Francisco	\$34000

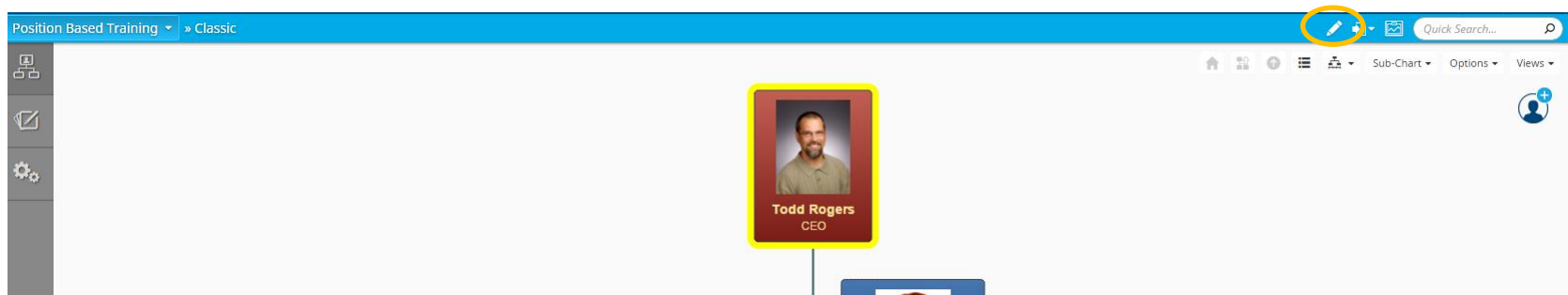
Double click on any employee in the Search view to highlight their box in the chart in the top half of your screen.

Use this drop down to apply a filter to your search.



# Plan – Create a New Plan

To create a new plan, select the New Plan icon that is shown at the top right of your chart workspace.



Once you have clicked on new plan, the New Plan panel will be displayed. On this panel you can choose which part of the chart you would like to plan for based on the selections under Plan Focus.

If you would like another user of OrgPlus RealTime to have access to work with your plan you will select that user from the Shared With dropdown. All users of OrgPlus RealTime with access to planning will be displayed in the Shared With dropdown.

**New Plan**

Plan Name  
New Plan 1

Comments (optional)

**Plan Focus**

- Entire Chart
- Displayed Chart
- Displayed Top Box + All levels
- Selected Branch

**Plan Properties**

Group: My Plans Plan Status: Active Owner: Training Adm

Shared With: Select a User...

OPEN CANCEL

**Callout 1:** You will need to provide a name for your new plan.

**Callout 2:** The owner will default to you. You can change the owner of this plan to anyone else in your organization who has access to OrgPlus RealTime planning.

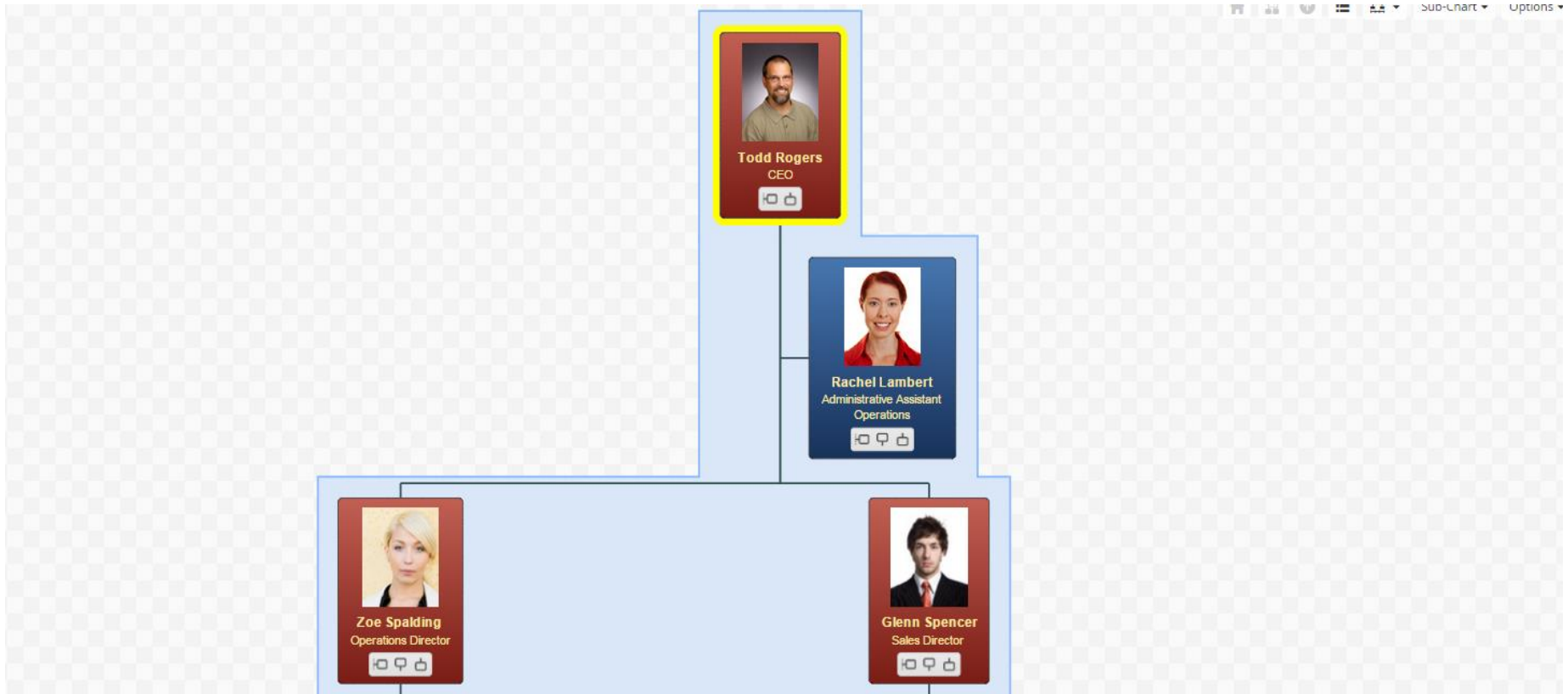
**Callout 3:** Once you have entered the name and focus click on Open to begin planning.

The owner will default to you. You can change the owner of this plan to anyone else in your organization who has access to OrgPlus RealTime planning.

Once you have entered the name and focus click on Open to begin planning.

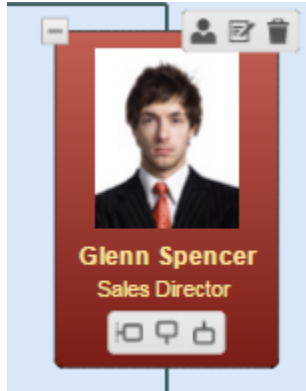
# Plan – Create a New Plan

Your chart will now be displayed in a planning mode. You will know that you are in a planning mode because of the blue background behind your chart, and the checkerboard background around your organizational chart.



# Plan – Create a New Plan

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.



On the top right hand side of each box there will be two new buttons: one to edit the user's information, and the other to delete the box from the chart.

A screenshot of the 'Edit Box' dialog. The dialog has a blue header with the title 'Edit Box' and a close button. It contains two text input fields: 'Full Name' with the value 'Glenn Spencer' and 'Position Title' with the value 'Sales Director'. At the bottom, there are two buttons: 'OK' (orange) and 'CANCEL' (grey).

When you click on the edit button it will bring up the information displayed in the employee's box and allow you to make changes. Once you have made the necessary changes, you will click on OK.


At the bottom of the employee's box there will be three icons. The first icon will create an assistant box. The middle icon will create a manager box. The third icon will create a subordinate box.

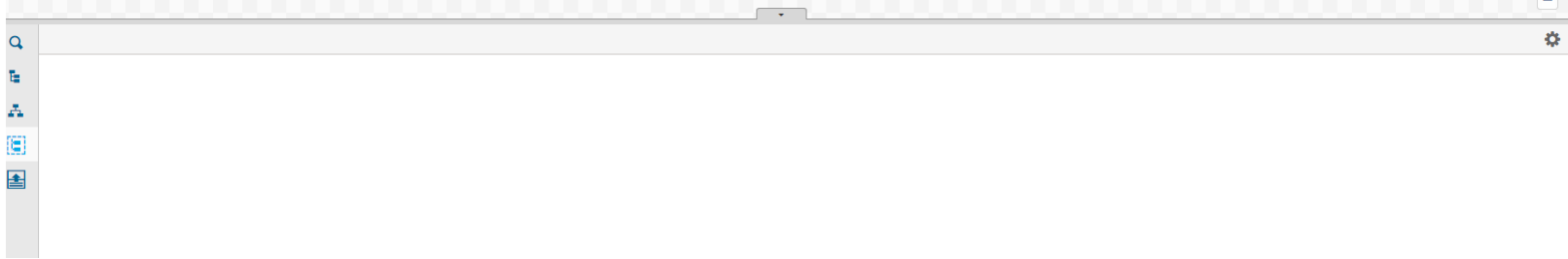



# Plan – Create a New Plan

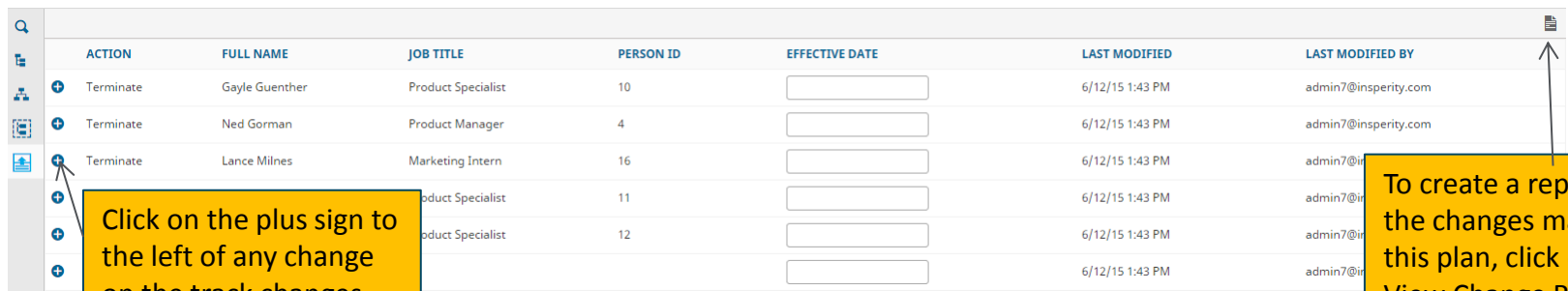
In the planning mode, there will be a staging area at the bottom of your screen. Rather than deleting an employee from your chart, you can click, drag and drop them to move them to the staging area. This will remove them from the chart and allow you to make decisions about whether to permanently delete them, or move them to a different supervisor within your chart. To access the Staging area click on the arrow at the bottom center of your screen.

There will be two new icons at the bottom left hand side of your screen.

 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.



 Track changes is the icon below the staging area at the bottom left hand side of the bottom half of your screen. When you click on this icon, the screen below will be displayed showing all of the changes that you have made in your plan.



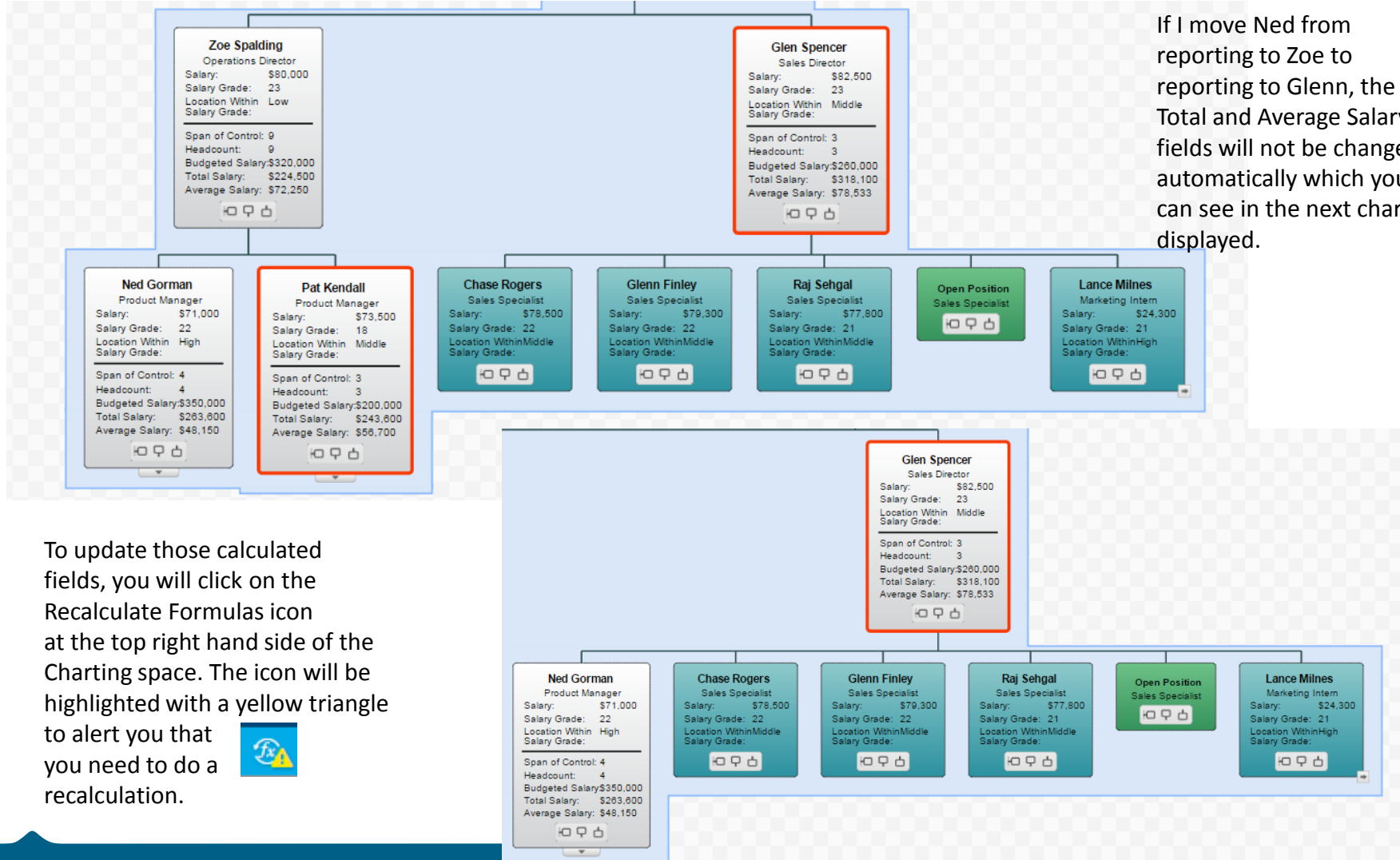
ACTION	FULL NAME	JOB TITLE	PERSON ID	EFFECTIVE DATE	LAST MODIFIED	LAST MODIFIED BY	
+	Terminate	Gayle Guenther	Product Specialist	10	<input type="text"/>	6/12/15 1:43 PM	admin7@insperity.com
+	Terminate	Ned Gorman	Product Manager	4	<input type="text"/>	6/12/15 1:43 PM	admin7@insperity.com
+	Terminate	Lance Milnes	Marketing Intern	16	<input type="text"/>	6/12/15 1:43 PM	admin7@ir
+			Product Specialist	11	<input type="text"/>	6/12/15 1:43 PM	admin7@ir
+			Product Specialist	12	<input type="text"/>	6/12/15 1:43 PM	admin7@ir
+					<input type="text"/>	6/12/15 1:43 PM	admin7@ir

Click on the plus sign to the left of any change on the track changes panel to see the details of that change.

To create a report of the changes made in this plan, click on the View Change Report icon.

# Plan – Create a New Plan

When you are in any view that has calculated fields and you move, add or delete employees you will need to click on the recalculate icon to recalculate the formulas found in the employee's box. For example, the Compensation view includes calculate fields.




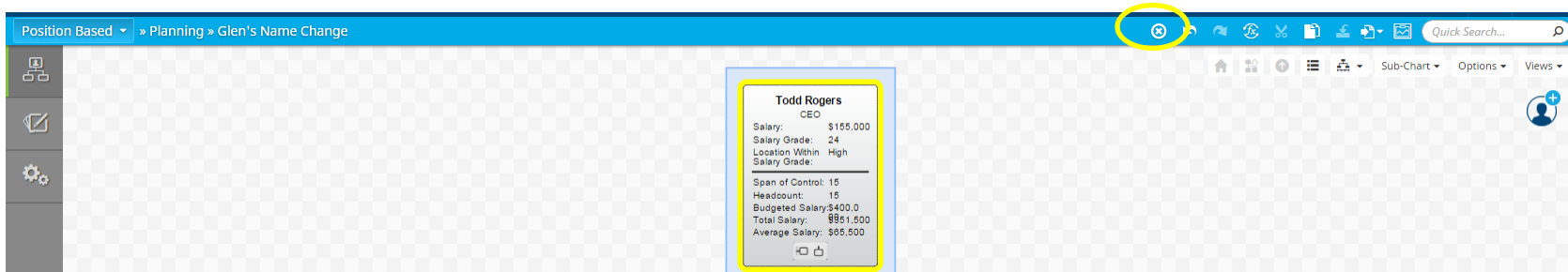
If I move Ned from reporting to Zoe to reporting to Glenn, the Total and Average Salary fields will not be changed automatically which you can see in the next chart displayed.

To update those calculated fields, you will click on the Recalculate Formulas icon at the top right hand side of the Charting space. The icon will be highlighted with a yellow triangle to alert you that you need to do a recalculation.



# Plan – Closing the New Plan

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



# Plan – Managing Plans



Once you have created and saved a plan, you can manage this plan by choosing the Manage Plans icon on the right side of your charting space. The screen below will be displayed. It will list out 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.

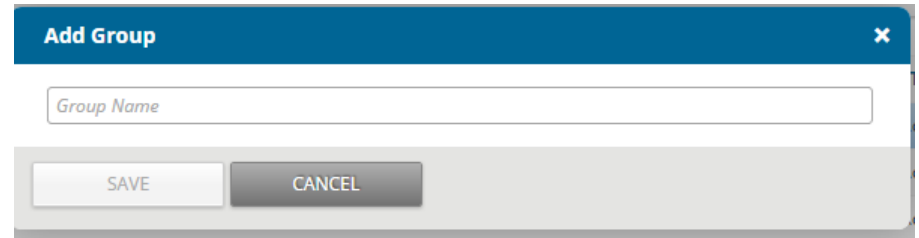
Manage Plans							New	Edit	Properties	Rename	Duplicate	Delete
Groups	PLAN NAME	OWNER	GROUP	SHARED WITH	STATUS	LAST MODIFIED	CREATOR					
Gayle's Plans	Glen's Name Change	admin7@insperity.com	Glen's Plans	glenn.spencer@marincorp1.com	Active	6/12/15 2:03 PM	admin7@insperity.com					
Glen's Plans	Gayle's Promotion	admin7@insperity.com	Gayle's Plans		Active	6/12/15 1:48 PM	admin7@insperity.com					
My Plans	Ned's Succession	admin7@insperity.com	Gayle's Plans		Active	6/3/15 1:57 PM	admin7@insperity.com					

**Filters**

- All Plans
- Created by me
- Owned by me
- Shared with me

# Plan – Managing Plans

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

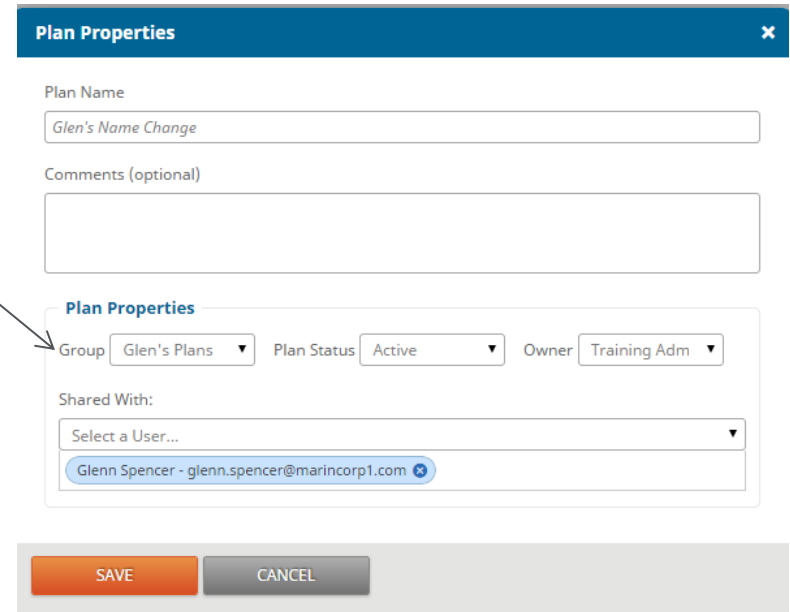


**Add Group** ✕

Group Name

SAVE CANCEL

Then you can begin putting plans into this group. To add existing plans to this group, you can click on the plan, then click on Properties. The screen to the right will be displayed, and you will click on the Group Dropdown to select the new group name, and then click on Save.



**Plan Properties** ✕

Plan Name  
Glen's Name Change

Comments (optional)

**Plan Properties**

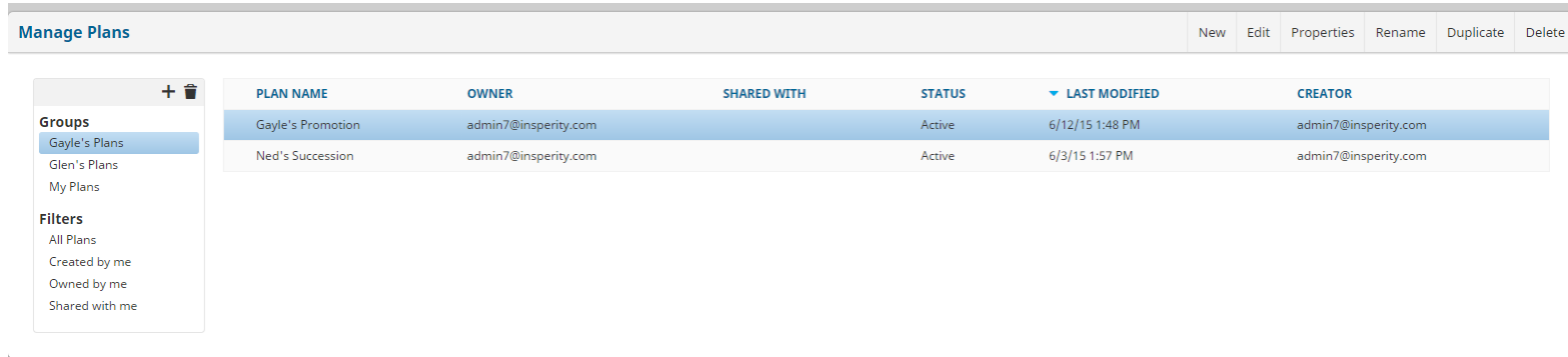
Group: Glen's Plans Plan Status: Active Owner: Training Adm

Shared With:  
Select a User...  
Glenn Spencer - glenn.spencer@marincorp1.com

SAVE CANCEL

# Plan – Managing Plans

To delete a group you can highlight that group name, and then click on the trash can icon. When you delete a group, all plans under that group will be deleted.



The screenshot shows the 'Manage Plans' interface. At the top, there is a header bar with the title 'Manage Plans' and several action buttons: 'New', 'Edit', 'Properties', 'Rename', 'Duplicate', and 'Delete'. Below the header is a sidebar on the left with a '+ trash' icon. The sidebar contains two sections: 'Groups' and 'Filters'. Under 'Groups', there are three items: 'Gayle's Plans' (highlighted), 'Glen's Plans', and 'My Plans'. Under 'Filters', there are three items: 'All Plans', 'Created by me', and 'Shared with me'. The main area of the interface is a table with the following columns: 'PLAN NAME', 'OWNER', 'SHARED WITH', 'STATUS', 'LAST MODIFIED', and 'CREATOR'. The table contains two rows of data:

PLAN NAME	OWNER	SHARED WITH	STATUS	LAST MODIFIED	CREATOR
Gayle's Promotion	admin7@insperity.com		Active	6/12/15 1:48 PM	admin7@insperity.com
Ned's Succession	admin7@insperity.com		Active	6/3/15 1:57 PM	admin7@insperity.com

To locate your plans, you can use the different filter capabilities on the left hand side of the Manage Plans screen.

On the Manage Plans screen you can create a new plan, by clicking on New. This will give you the same functionality as starting a new plan from the charting space.

To edit an existing plan, highlight the plan, and click on Edit. This will allow you to continue working in an existing plan with all of the functionality detailed in the Create a New Plan slides.



# Plan – Managing Plans

To change any of the properties such as the plan status, plan owner, or share the plan with additional users, highlight the plan and click on Properties. That will display the screen below which has all of the same options as you see when you create a new plan.

### Plan Properties

Plan Name

Comments (optional)

**Plan Properties**

Group  Plan Status  ← Owner

Shared With:

Hint: Change the plan status to approved, if you no longer want the plan to be editable.

Also, on the Manage Plans screen you also have the ability to Rename, Duplicate or Delete any of your plans.

Position Based » Planning » Manage Plans

### Manage Plans

New Edit Properties Rename Duplicate Delete

PLAN NAME	OWNER	GROUP	SHARED WITH	STATUS	LAST MODIFIED	CREATOR
Glen's Name Change	admin7@insperity.com	Glen's Plans	glenn.spencer@marincorp1.com	Active	6/12/15 2:03 PM	admin7@insperity.com
Gayle's Promotion	admin7@insperity.com	Gayle's Plans		Active	6/12/15 1:48 PM	admin7@insperity.com
Ned's Succession	admin7@insperity.com	Gayle's Plans		Active	6/3/15 1:57 PM	admin7@insperity.com

**Groups**

- Gayle's Plans
- Glen's Plans
- My Plans

**Filters**

- All Plans
- Created by me
- Owned by me
- Shared with me



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