cornerstone

Org Planning

Edge Integration Guides

Find out how the Org Planning Integration can help your organization visualize your organizational structure to make better business decisions

Cornerstone Edge

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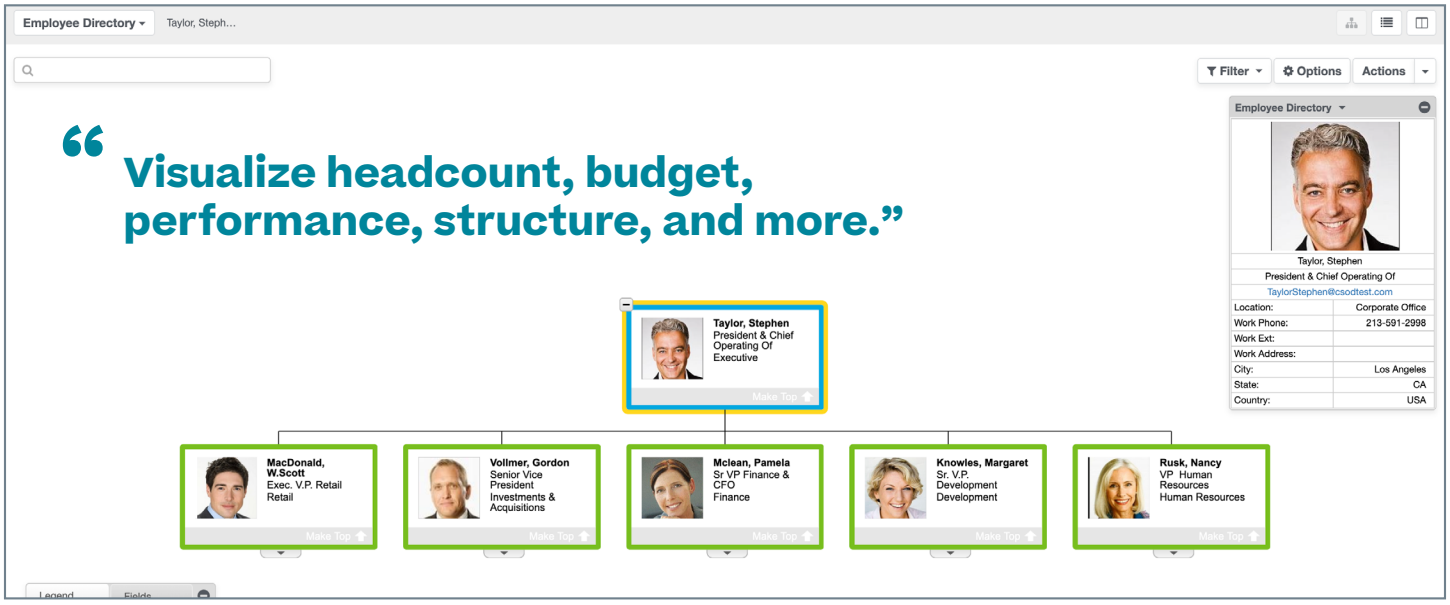
Getting Started

Cornerstone's Org Planning integration is a visual, comprehensive, collaborative solution that consolidates critical HR, talent and organizational data into a powerful, easy-to-use platform. You'll see headcount, budget, performance, structure and more all in one place, enabling instant and accurate insights. When the business environment changes, you'll be empowered to proactively adapt and align talent for success.

Org Planning brings together information for a holistic view of your workforce including full-time, part-time, and contractors. Org Planning provides a powerful visualization solution to give executives, managers, and human resources the power to thoroughly understand the organization, along with metrics and key performance indicators as a basis for critical organizational decision making.

Org Planning works with the following browsers:
Windows OS: Chrome, Edge Chromium, Firefox
Mac OS: Safari (excluding administration features)



Begin the Enablement Process

Only available in production; not available in pilot and stage environments.

1. The Org Planning Integration is available for configuraiton in the Edge Marketplace.
2. Navigate to Admin > Tools > Edge > Marketplace.
3. Search for and select the Org Planning tile
4. Click the “Get Started” button
5. Enter your contact details

A Cornerstone representative will reach out to you regarding potential cost and enablement.

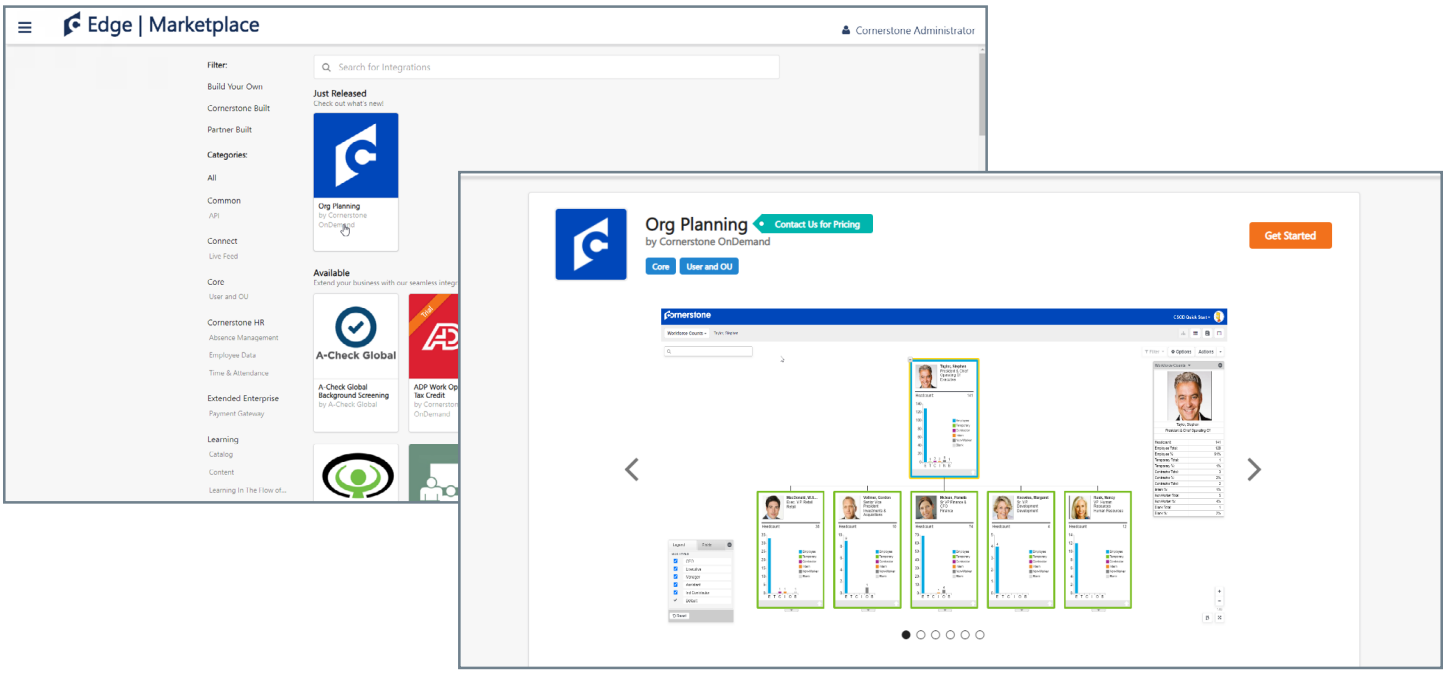
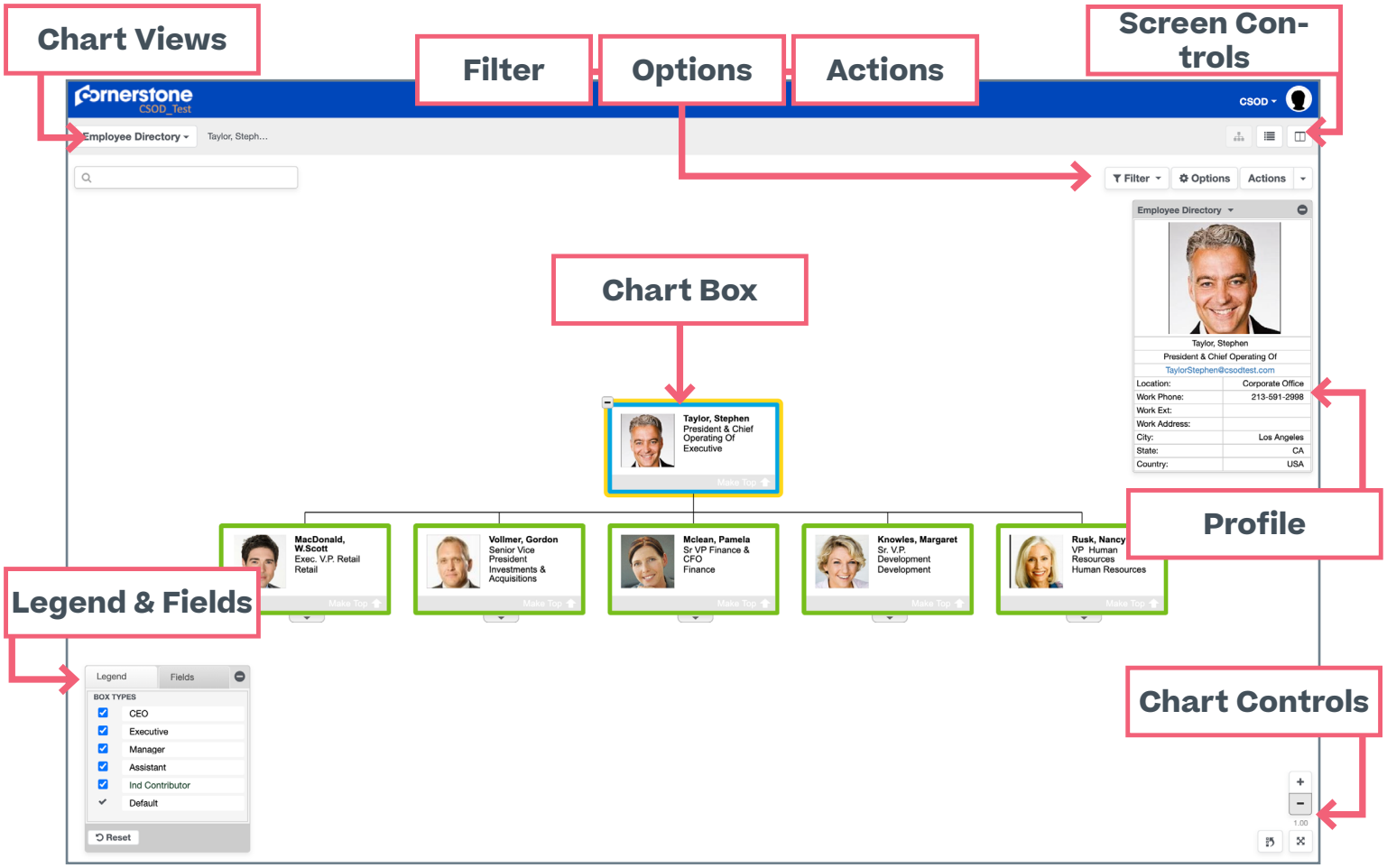


Chart View

The chart view is the default view of the Org Planning integration, used to visually represent and explore your organizations structure.

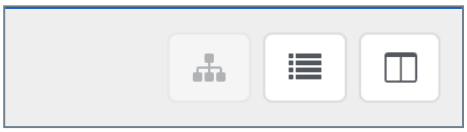
Each employee in your organization will display below their manager in an individual card containing relevant information and their profile picture (if available). Selecting an employee wil display more in depth information in the profile box.

The information displayed is dependent on your selection of data views, filter, options, and actions.



Screen Controls

The screen controls allow you to select between View as Chart, View as List, and Split Screen.



Profile

The Profile displays the more in-depth information for the selected Chart Box. The **data** that dispalys is dependent on the selected view.

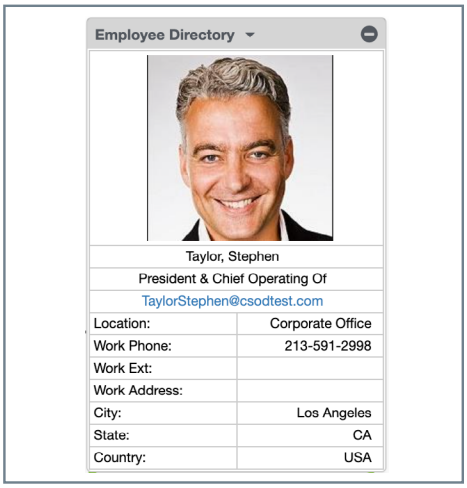


Chart Box

The Chart Box is the user card that displays in-line of your organizational structure, connecting users directly with their manager and direct reports.

The **data** that displays in the Chart Box is dependent on the selected view and filters.

The **–** and **+** in the top left of the box allows you to collapse the box and expand it again.

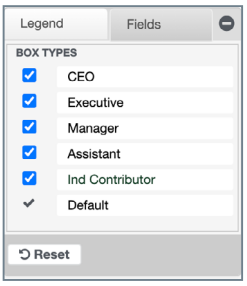
The **navigation arrow** at the bottom of the box allows you to view the direct reports of the selected user. Once selected, a navigation arrow will appear at the top of the box allowing you to move back up the hierarchy.

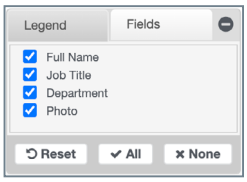
The **Make Top** option displays the selected user as the top of the chart hierarcy.

Legend & Fields

The **Legend** allows you to select the user roles that are highlighted in the chart. Deselcting a role will change the color of the correspoding user Chart Boxes to orange.

The **Fields** tab allows you to deselect and select which fields are displayed in the Chart Box. The values available to select are dependent on the selected views.

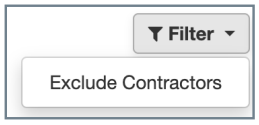


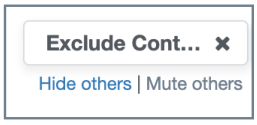


Filters

The Filters available are dependent on the User Types configured in the User Preferences.

Once a filter is selected the corresponding user Chart Boxes are greyed out (muted). You will also have the option to Hide the users to remove them from view.

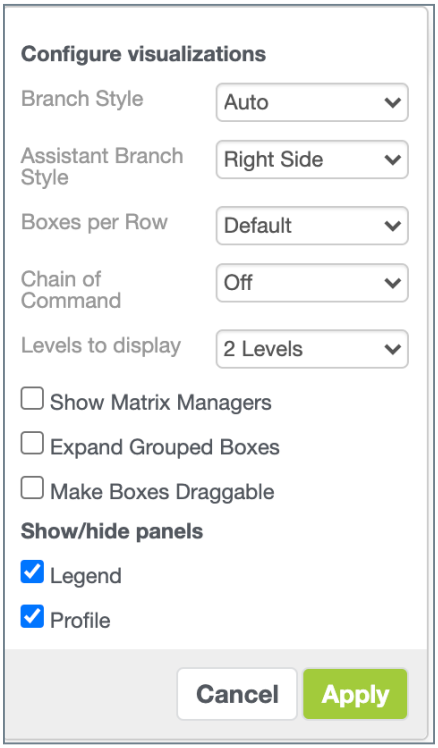




Options

The Options dropdown allows you to configure the visualization of the chart and how your hierarchy is displayed. These options include:

- **Branch Style** allows you to determine the layout of the hierarchy branches.
- **Assistant Branch Style** allows you to determine which side of the branch an assistant will appear on.
- **Boxes per Row** allows you to decide how many subordinate chart boxes appear before a new row is created in the hierarchy.
- **Chain of Command** allows you to determine how many levels of your organizations hierarchy above the selected Chart Box will display.
- **Levels to Display** allows you to determine how many levels down the hierarchy of the selected Chart Box display.
- The **Legend** checkbox allows you to determine the visibility of the Legends & Fields panel.
- The **Profile** checkbox allows you to determine the visibility of the Profile panel.



Actions

The Actions dropdown allows you to select export options for the displayed Chart configuration. The publish options include:

- Publish to PDF
- Publish to PowerPoint
- Export to Excel

The selected publish option will provide you with further options to format your data.

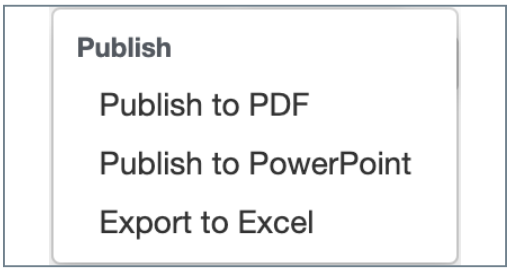
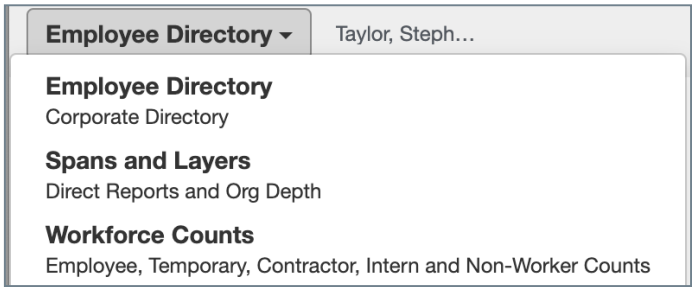


Chart Controls

The Chart Control options allow you to zoom in and zoom out of chart display, and to fit the chart to the window and return the chart back to the starting point.

Chart Views

The Chart Views options allow you to determine the data that is display in the Chart Boxes and Profile panel. These options also determine the available fields that can be selected in the Fields panel.



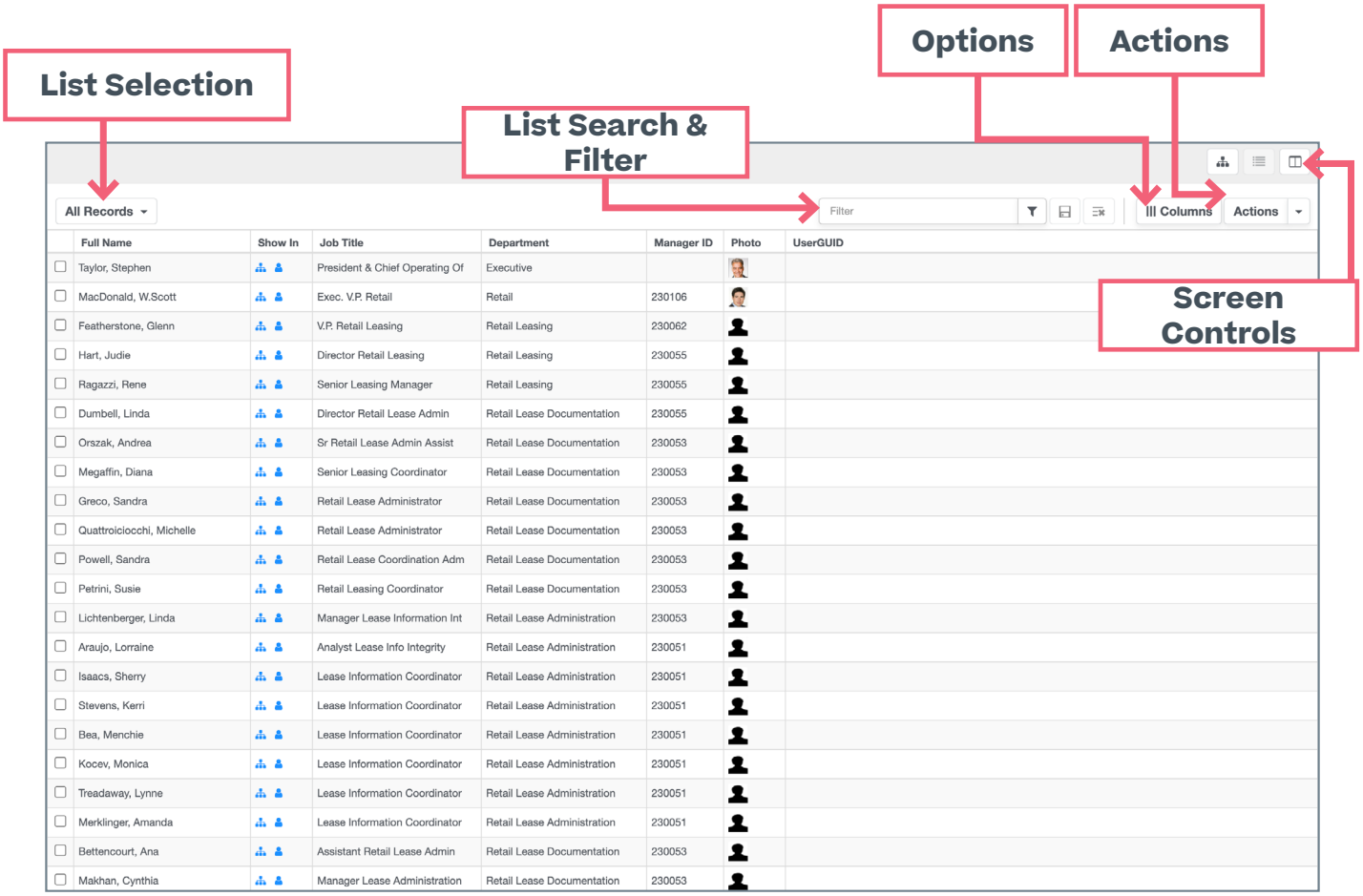
The available Views include:

- **Employee Directory** - The Employee Directory view provides user record information.
- **Spans and Layers** - The Spans and Layers view provides information regarding a users headcount and span of control.
- **Workforce Counts** - The Workforce Counts view provides information regarding a user's headcount and breaks down the employee types graphically.

List View

The List View provides a configurable spreadsheet of your organization's users. The columns displayed are configurable, with data available from user records, performance, compensation, and succession.

With List View you can filter profiles, compare user records, and save and export the list you've created.



Full Name	Show In	Job Title	Department	Manager ID	Photo	UserGUID
Taylor, Stephen		President & Chief Operating Of	Executive			
MacDonald, W.Scott		Exec. V.P. Retail	Retail	230106		
Featherstone, Glenn		V.P. Retail Leasing	Retail Leasing	230062		
Hart, Judie		Director Retail Leasing	Retail Leasing	230055		
Ragazzi, Rene		Senior Leasing Manager	Retail Leasing	230055		
Dumbell, Linda		Director Retail Lease Admin	Retail Lease Documentation	230055		
Orszak, Andrea		Sr Retail Lease Admin Assist	Retail Lease Documentation	230053		
Megaffin, Diana		Senior Leasing Coordinator	Retail Lease Documentation	230053		
Greco, Sandra		Retail Lease Administrator	Retail Lease Documentation	230053		
Quattroiciocchi, Michelle		Retail Lease Administrator	Retail Lease Documentation	230053		
Powell, Sandra		Retail Lease Coordination Adm	Retail Lease Documentation	230053		
Petrini, Susie		Retail Leasing Coordinator	Retail Lease Documentation	230053		
Lichtenberger, Linda		Manager Lease Information Int	Retail Lease Administration	230053		
Araujo, Lorraine		Analyst Lease Info Integrity	Retail Lease Administration	230051		
Isaacs, Sherry		Lease Information Coordinator	Retail Lease Administration	230051		
Stevens, Kerri		Lease Information Coordinator	Retail Lease Administration	230051		
Bea, Menchie		Lease Information Coordinator	Retail Lease Administration	230051		
Kocev, Monica		Lease Information Coordinator	Retail Lease Administration	230051		
Treadaway, Lynne		Lease Information Coordinator	Retail Lease Administration	230051		
Merklinger, Amanda		Lease Information Coordinator	Retail Lease Administration	230051		
Bettencourt, Ana		Assistant Retail Lease Admin	Retail Lease Documentation	230053		
Makhan, Cynthia		Manager Lease Administration	Retail Lease Documentation	230053		

Screen Controls

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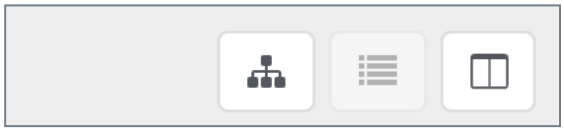


List Search & Filter

The List Search bar lets you search for specific records in the user list.

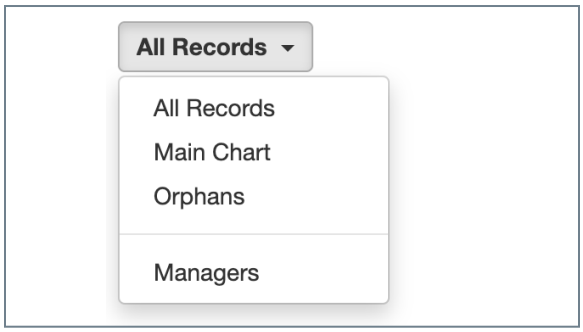
The Filter icon lets you filter your list results based on your selected criteria. All potential Org Planning fields are available for filtering, each with unique parameters based on their values.

The Save icon allows you to save your results and filters as a Smart List. This list will appear in the List Filters dropdown.

The Clear icon will remove your search and filter parameters.

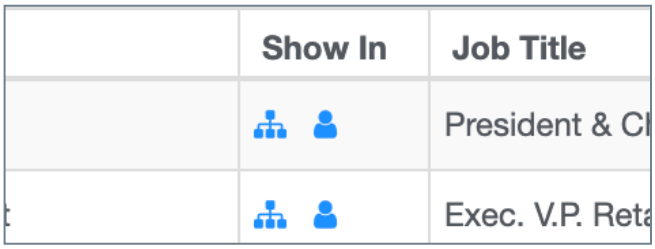
List Selection

The List Selection dropdown allows you to quickly access pre-built system fields and any Simple Lists or Smart Lists you've created.

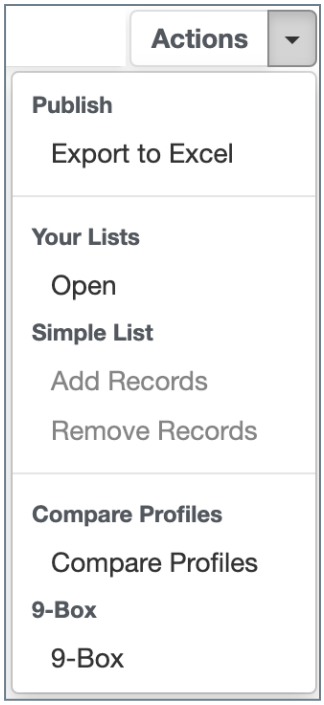


Show In

The Show In column of the list lets you determine if you want to display the user records Profile panel or view the selected record in the Chart View.



Actions

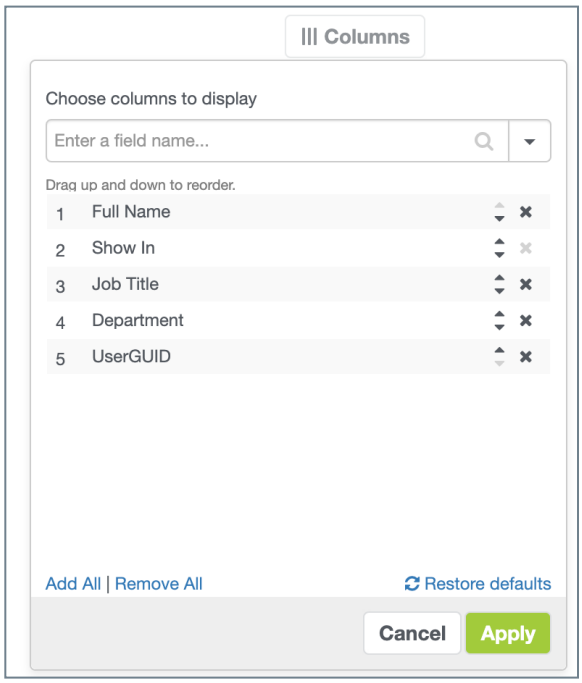


The Actions dropdown gives you the options to:

- **Export to Excel** - allowing you to publish your list to a Microsoft Excel document, giving you the option to add more fields, and export the entire list or only selected records.
- **Your Lists** - by selecting **Open**, you are able to open any of the lists you have saved and create new Smart Lists or Simple Lists. You can also edit, rename, duplicate, or delete any of these lists you have created.
- **Simple Lists** - when one or more user records have the checkbox next to their name selected, the ability to **Add records** to a list is available. You may select to add the records to an existing list or create a new list.
  - When viewing an existing Simple List (using the List Filter or Your Lists option) you will be able to select the records from that list and use the Remove Records option to remove them.
- **Compare Profiles** - allows you to view the profiles of multiple selected records at once.
- **9-Box** - displays the Succession 9-Box rating for the selected record. Selecting the gear icon allows you to adjust the settings of the 9-Box.

Columns

The Columns button allows you to add and re-arrange the columns that appear in your list. Availalbe column data can be selected from user records, performance, compensation, and succession information.



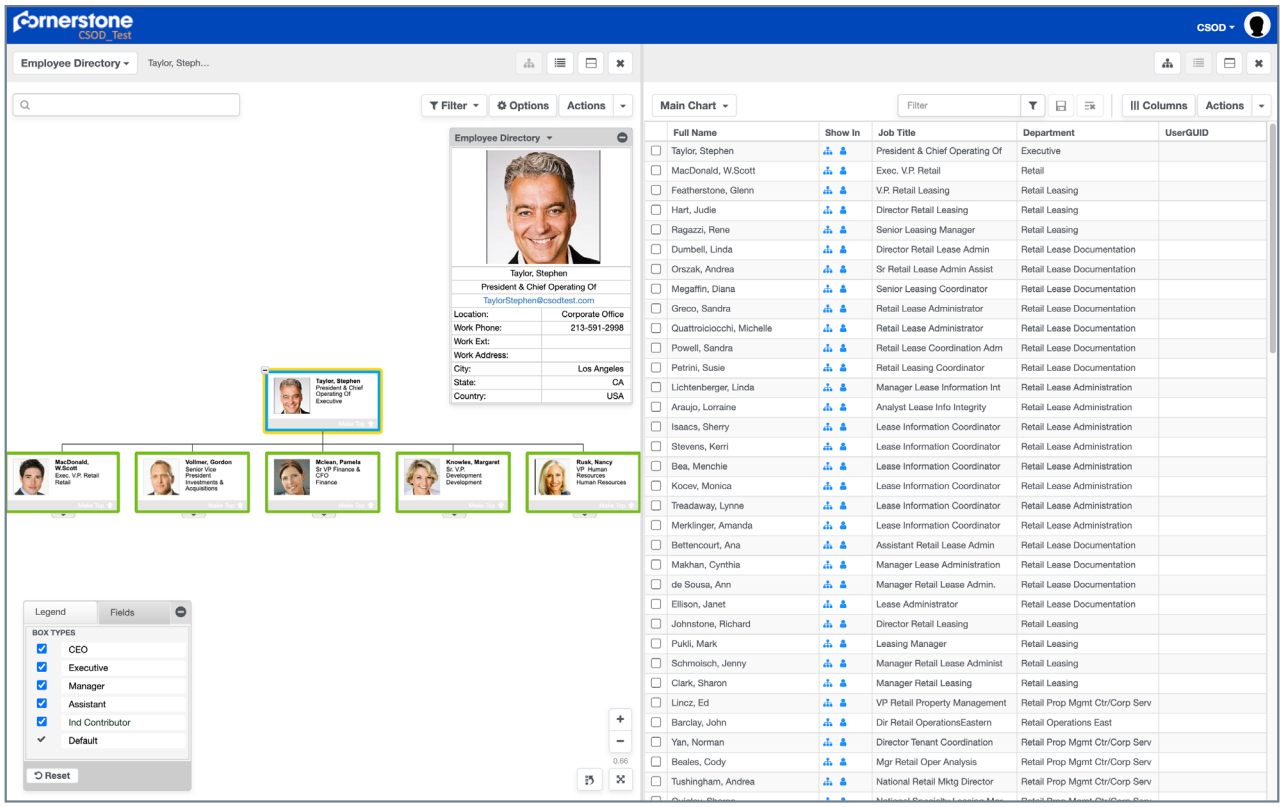
Split Screen

Chart View and List View can be displayed at the same time by selecting the Split Screen icon in the Screen Controls. By default the split occurs vertically with each view side-by-side.

Once split screen is enabled, selecting the split screen icon again will split the screen vertically, one on top of the other.

While split, you can select the Chart View and List View icons to either switch where each appears in the split or to have both sides contain the same view. This will allow you to have two lists open at once or two charts, so you can view different results at one time.

Selecting the X icon from either side will close the split view.



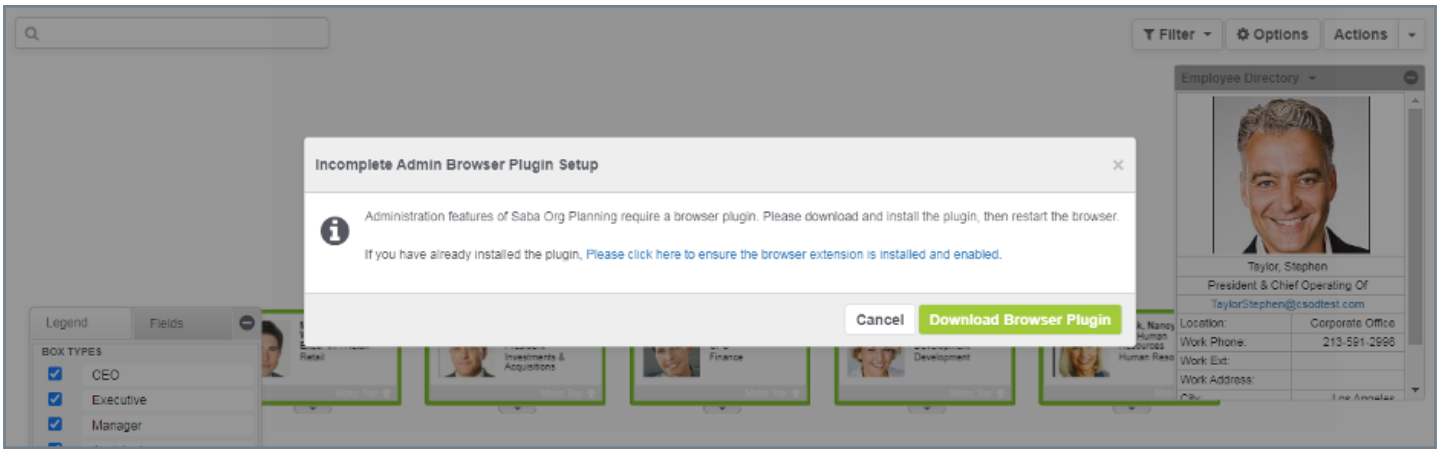
Administration

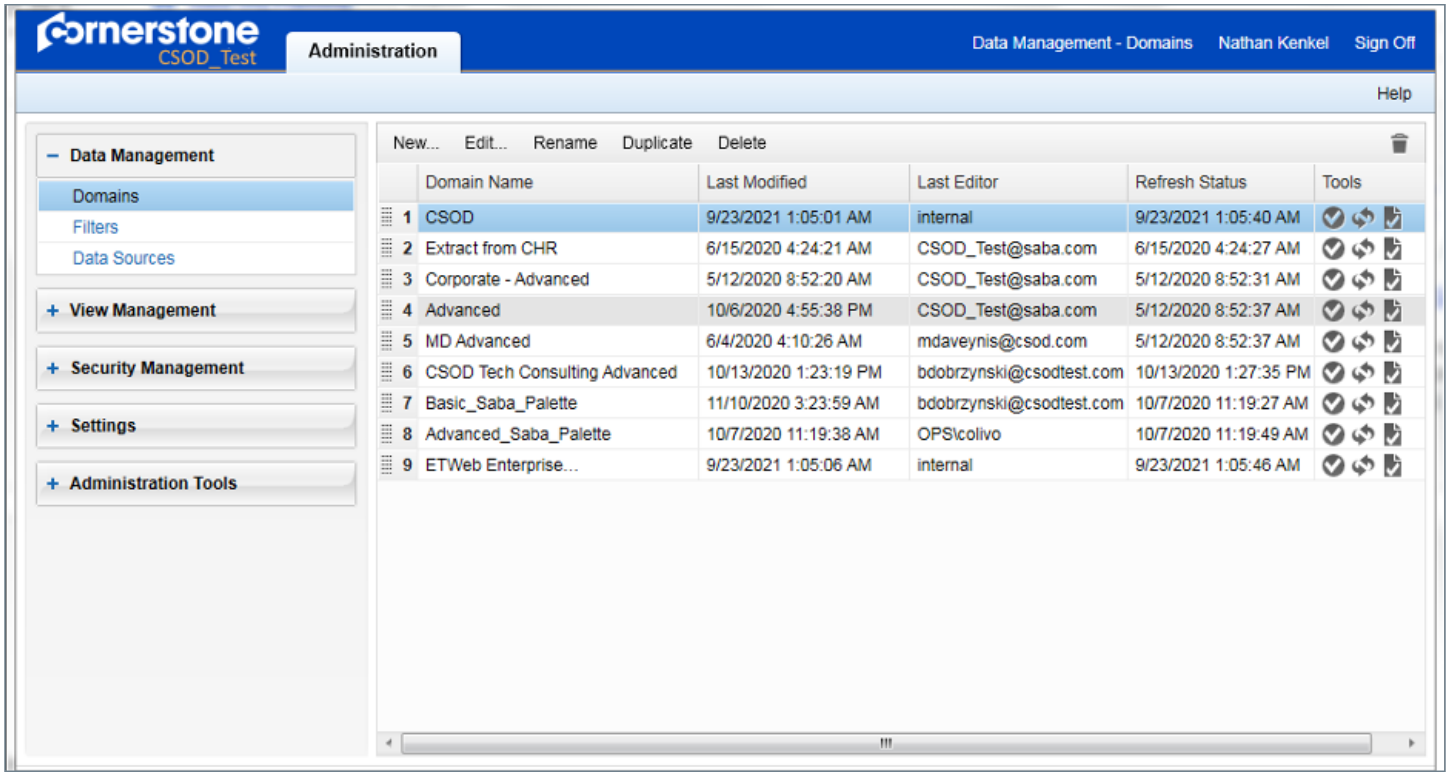
Org Planning administration features allow you to configure Data, View, and Security settings.

Administration features are only available for Windows operating systems. This option will not appear on Mac computers.

To access Administration, you will need to download the Administration console extension for your browser.

Detailed instructions for the downloading the extension can be found here.





Data Management

Within Administration you can define the requirements and best practices for preparing and managing project data.

- Create and manage **domains** to include all the information necessary to configure the fields, views and security policies for an organization.
- Create and manage **filters** to limit the organizational records that a user (or group of users) can view.
- Prepare data sources to create **charts** or directories from data stored in a variety of file formats, databases, and directories.

Detailed instructions for Data Management can be found here.

View Management

Once you have created and organized your data, you can create views to determine how to display charts in Saba Org Planning. A view contains all the formatting parameters used to render a chart.

Detailed instructions for View Management can be found here.

Security Management

Saba Org Planning has a flexible security architecture and is designed to fit into your existing security infrastructure.

- User Accounts, the login, identification, and role information for each user.
- Roles, groups of accessibility permissions you can assign to users.
- Role Assignment Rules, individual permissions you can group into roles.
- Security Settings, methods for authenticating users.

Detailed instructions for Security can be found here.

Settings

In Saba Org Planning, as an administrator, you can configure the default settings for:

- Visualize - Allows you to change the default settings for the Saba Org Planning workspace.
- Branding - Allows you to change the branding for Saba Org Planning.
- Plan & Model - Allows you to configure the default plan status settings for the Plan & Model workspace to match your company's business processes.
- Publish and Export - Allows you to publish and export the chart data to the supported formats.
- Succession Planning - Allows you to customize various succession plan status settings. Security Settings, methods for authenticating users.

Detailed instructions for Setting can be found here.

Administration Tools

Administration Tools allow you to keep track of application events and configure the Help location.

Detailed instructions for Security can be found here.