

Human Resources Information Systems

Planning @ Work User Guide

About Planning @ Work

Planning @ Work allows users to view and search the University's organization (org) charts. This software provides faculty and professional staff with access to view the organizational structure as well as verify reporting relationship to ensure up-to-date information on the University's hierarchy. Planning @ Work is the new version of the University's organizational chart software, OrgPlus.

Drexel's Planning @ Work will allow users to view the University's organizational structure with features that include:

- Charts at all levels of the organization
- Contact information for faculty and professional staff
- Directory search functionality to find faculty and professional staff by name and/or department

Financial administrators will have access to the following information based on Web*Salary security:

- Ability to view department's org chart with salary information displayed
- Access to "Plan & Model" to visualize organizational changes

Accessing Planning @ Work

All benefit eligible faculty and professional staff members can access Planning @ Work utilizing their Drexel Connect credentials.

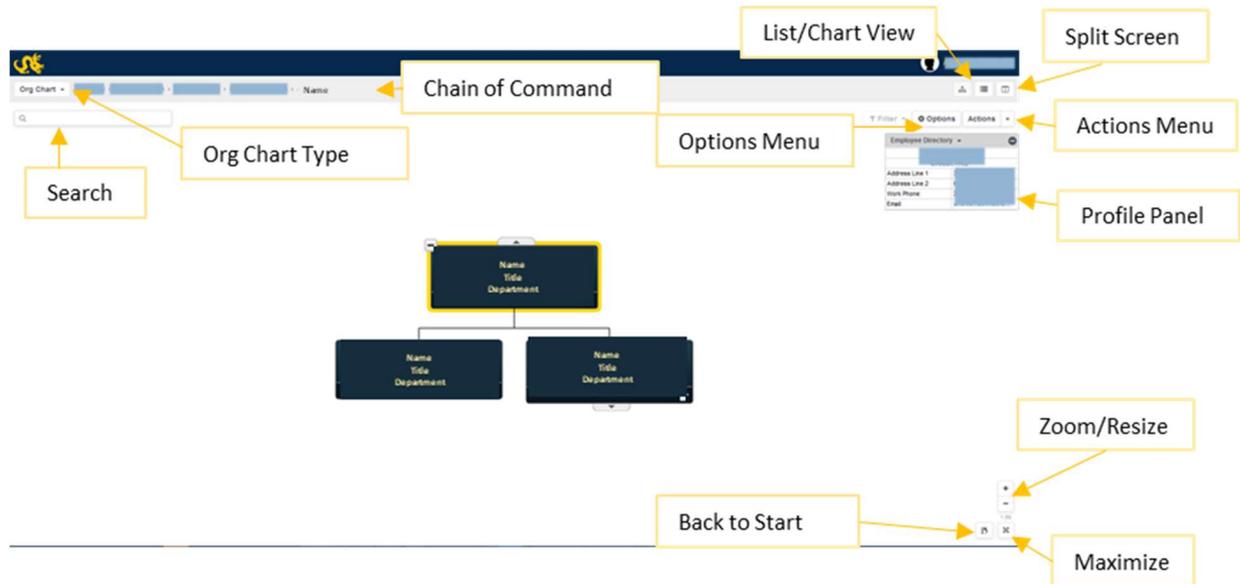
- [Planning @ Work](#) – preferred browsers Firefox, Safari (Mac OS)

Please note, Planning @ Work is designed for HTML5 supported browsers. While the software will function in Internet Explorer, users will be redirected to a Silverlight version of the site. The instructions and screenshots included in this documentation focuses on the HTML5 version and will vary from the display in Internet Explorer.

Organization Charts & Navigation

Upon logging into to Planning @ Work, you will be on your **home screen**. The home screen automatically displays your position in the org chart.

Selecting the **Back to Start** icon  will return you to your position in the chart.



The top of the page displays the **chain of command**. Select a name in the chain of command to jump to that individual's place in the hierarchy.

Users can toggle between a **list view**  and **chart view** . The chart view displays the information in a traditional organizational chart. The list view will display a list of employees.

The **Profile Panel** displays the directory information for the selected employee.



The **Options Menu**  allows for users to change display options, such as number of levels, branch style, etc. The **profile panel** can be toggled on/off from this menu.

Users can search for individual employees by via the **search bar**  at the top of the page.

Selecting the **Split Screen** icon  will split the display into two, allowing for users to search and display two different sets of organizational charts and/or lists at the same time. Select the close icon  to return to single view.

Additional Features

Exporting Data:

To export the current display, select the **Actions Menu**  to view the export options.

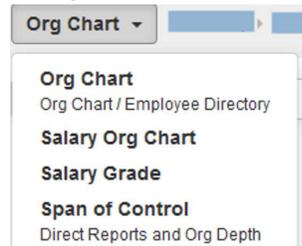
Plan & Model:

Users with appropriate Web*Salary security have the option to Plan & Model. Under the **Actions Menu**  select **New Plan** to start a new plan. Enter a name for your plan in the Plan Name field, set the options under Plan Focus and select Open to begin modeling the new plan. Select “Close Plan” from the actions menu to exit the plan.

To view previously saved plans, select **Open Plan** from the **Actions Menu** on the organizational chart display.

Change Type of Org Chart:

Users with appropriate Web*Salary security can toggle between different salary display views. To change the view select the down carrot on **Org Chart Type** and select the desired org chart type.



Additional Navigation Help

Additional help topics, videos, and Frequently Asked Questions can be accessed by selecting the down carrot next to your Employee Name at the top of the page, and selecting **Help**

