Confirmit Hierarchy Management User Guide

Confirmit Horizons v20

This is document revision 1 of the Confirmit Horizons v20 Hierarchy Management User Guide. The information herein describes Confirmit Horizons Hierarchy Management and its features as of Build nr. 20.1.69 (given in the Authoring **Home > Help > About** menu), published in June 2016. New features may be introduced into the product after this date. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

Table of Contents

What's New in this Revision?

The following changes have been made in revision 1 of the Confirmit Horizons Hierarchy Management User Guide:

- The Searching for Nodes and Contacts section is added to the Editing the Hierarchy chapter (go to Searching for Nodes and Contacts on page 23 for more information).
- A correction is made in the Limitations and Restrictions chapter (go to Limitations and Restrictions on page 35 for more information).

Note: The general layout and language in this document is continually being corrected, adjusted and improved to ensure the user has the best possible source of information. Only NEW information and details of functionality that has changed since the previous issue are listed here - minor corrections to the text and document layout are not listed.

Important
We need your feedback so we can improve this document and provide you with the information you require. If you have any comments or constructive criticism concerning the content or layout of this documentation, please send an email to documentation@confirmit.com. Please include in your email the section number and/or heading text of the section to which your comment applies.

1. Introduction

A hierarchy is an arrangement of items (objects, names, values, categories, etc.) in which the items are represented as being "above", "below," or "at the same level as" one another. Each item can have zero or more subordinates ("children"), and zero or one immediate superior ("parent"). For example, members of an organization could be ranked according to relative status or authority. Most governments, corporations and organizations are hierarchical.

Hierarchies are used in Confirmit Horizons for example when running employee satisfaction surveys, to define the structure of the organization. This allows employees to be grouped into the correct departments under the correct managers, and this in turn allows the appropriate permissions to be allocated so that the employees have access to information relevant to their positions within the organization when the results are reported.

Each "location" in the hierarchy, in this case each position in the company, is termed a "Node", with the lowest level - those with no-one reporting to them, being termed "Leaf" nodes to indicate their positions at the ends of the branches - see the figure below.

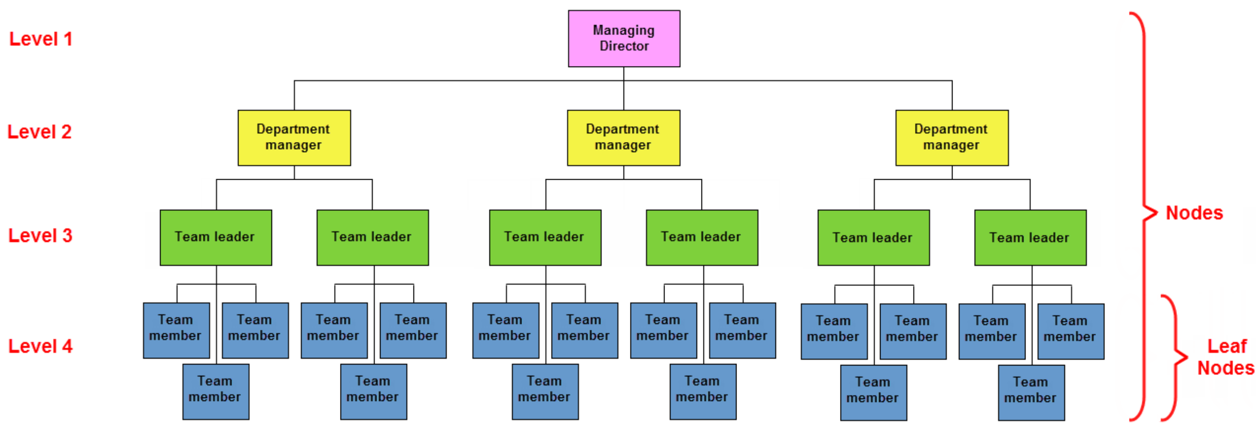


Figure 1 Hierarchy example

The Confirmit Horizons Hierarchy Management functionality allows you to define your hierarchies by importing Excel®[1] spreadsheets, which may for example be based on output from a Human Resource Information System (HRIS). The hierarchy can then be edited further within Horizons. Or you can export a definition file from Horizons to Excel, edit the file and then re-import. Horizons supports up to 15 levels in a hierarchy.

1.1. Hierarchy Management Requirements

Hierarchy Management Requirements		
Element	**Minimum**	**Recommended**
Operating system	Windows Vista SP2. OSX	Windows 7, Windows 8 Desktop or Windows 10.
Web browser	Internet Explorer 10 (Windows only), Microsoft Edge (current and previous 5 releases), Firefox (current and previous 5 releases), Chrome (current and previous 5 releases).	Internet Explorer 11, Microsoft Edge (latest), Chrome (latest), Firefox (latest).

[1]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

1.2. Hierarchy Management vs Database Designer

Confirmit Horizons also has capabilities for designing hierarchies within the “Database Designer” module in Professional Authoring, which precedes the Hierarchy Management module. These modules share the same back-end, so hierarchies can be used very much in the same way regardless of which of the modules it has been set up in: You can use the hierarchy definition in a “hierarchy” question in a survey, either as a background variable or as a visible, normal question, and it can be reported on and also used as a personalized report filter so that you can set up role-based access to the reports for end users. In addition to providing a very different user experience, there are some key functional differences between the two:

- In the Hierarchy Management module, any change to the hierarchy definition is instantly live in any surveys or reports using the hierarchy. In the Database Designer module you make edits in a “Design” mode, and have to synchronize these changes to “Runtime” for them to update in surveys and reports.
- The Hierarchy Management module provides an interface for assigning contacts to hierarchy units. This capability is not available in the Database Designer module.
- The Hierarchy Management module supports giving end users (business users) access to edit the hierarchy definition. The Database Designer module is only available for Professional Users.
- The Database Designer module supports hierarchy definitions with node labels in multiple languages. Hierarchy Management supports one language only (English).
- The Database Designer module supports “Additional columns” which can contain additional values for hierarchy nodes (like norms, benchmarks, counts etc.). This is not supported in the Hierarchy Management module.

Hierarchies set up in Hierarchy Management cannot be opened in Database Designer, and vice versa. It is however possible to export a hierarchy definition from one and import it into the other.

1.3. Importing Hierarchy Definitions

A hierarchy definition is an Excel™ file containing a table that defines the hierarchy layout. The column headers are predefined in the system, and if the headers are used then they must be as shown in the table below.

When uploading to hierarchy management, the Excel™ file can contain hierarchy definition and contacts data (for example for employees), or just the hierarchy definition. And for the hierarchy definition, it is possible to upload with the relations between nodes on different levels specified in two different ways: Either in “parent-child” format, where a node id and node label is provided along with the id of the parent node (or empty if the node is at the root level), or in “full path” format, where the node’s position in the hierarchy is provided by listing the full path from the top of the hierarchy through the different levels to the specific node. For the “full path” format, it is possible to upload a file either with or without node id columns. So in total, six types of uploads are supported:

1. Upload of “full path” hierarchy definition with external node ids and labels.

   The file includes columns for node IDs and node labels. If these columns contain data then the data will be included in the appropriate levels in the hierarchy automatically. The table below shows the definition for a very simple 2-level hierarchy. In this case the top level (L1:) is the “company” Mega Sales, and this company has two departments in the second level (L2:); Finance and Marketing.

	A	B	C	D	E	F
1	Node ID	Node Label	L1:	L2:		
2	MEGA	Mega Sales	Mega Sales			
3	FIN	Finance	Mega Sales	Finance		
4	MAR	Marketing	Mega Sales	Marketing		
5						

Figure 2 Example of a simple hierarchy definition with Node IDs and labels

The company hierarchy based on this definition will be as shown below:

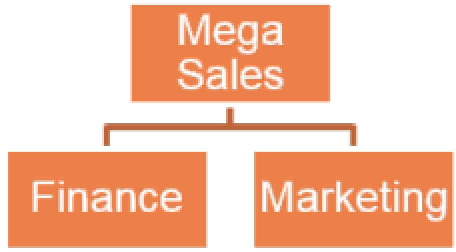


Figure 3 A simple company hierarchy with node IDs and labels

This type of definition has the advantage that it is easily updated. Note that each level in the company requires its own "L" column (in addition to the Node ID and Node Label columns), so a company with four levels in the hierarchy will require columns L1, L2, L3 and L4.

2. Upload of "full path" hierarchy definition without external node ids.

   If node IDs are not provided in the hierarchy definition then on upload the system will automatically generate node IDs for each node. These will merely be numbered sequentially starting from 1.

3. Upload of "full path" hierarchy definition with external node ids and with contacts assigned to the hierarchy. Note that this requires that a contact database is set up in SmartHub and linked to the hierarchy. If the contact database includes employee data then the resulting definition could be as below:

	A	B	C	D	E	F	G	H
1	Node ID	Node Label	L1:	L2:	contactid	email	Name	Gender
2	MEGA	Mega Sales	Mega Sales		1440	documentation1@confirmit.com	Adam Avian	1
3	MEGA	Mega Sales	Mega Sales		1441	documentation2@confirmit.com	Belinda Brant	2
4	FIN	Finance	Mega Sales	Finance	1442	documentation3@confirmit.com	Charles Chaffinch	1
5	FIN	Finance	Mega Sales	Finance	1443	documentation4@confirmit.com	David Dunlin	1
6	FIN	Finance	Mega Sales	Finance	1444	documentation5@confirmit.com	Ellen Eagle	2
7	MAR	Marketing	Mega Sales	Marketing	1445	documentation6@confirmit.com	Fred Fulmar	1
8	MAR	Marketing	Mega Sales	Marketing	1446	documentation7@confirmit.com	Gareth Gadwall	1
9	MAR	Marketing	Mega Sales	Marketing	1447	documentation8@confirmit.com	Helen Hawk	2
10	MAR	Marketing	Mega Sales	Marketing	1448	documentation9@confirmit.com	Ian Ivorybill	1
11								
12								

Figure 4 Example of a hierarchy definition with contacts

   Each employee in the company will require his/her own row in the table. In this case two people are assigned to the top Mega Sales node, three are assigned to the second-level Finance node, and four are assigned to the second-level Marketing node. You can view which employees are assigned to each hierarchy node, and you can add and delete employees and move them between nodes as required due to for example promotions, hirings and resignations (go to Editing the Hierarchy on page 14 for more information). Note that the contactids must be unique for the hierarchy.

4. Upload of "full path" hierarchy definition without external node ids and with contacts assigned to the hierarchy. In this case node ids will be generated automatically, and a contact database must be set up and linked to the hierarchy.

5. Upload of "parent-child" hierarchy definition. In a "parent-child" hierarchy definition the Excel file to upload must have one column for the node id, one for the node label and one for the parent id. Column headers should be "Node id", "Node label" and "Parent id", or, for backwards compatibility with Database Designer, they can also be labeled "id", "__l9", "parent".

	A	B	C	D
1	Node ID	Node Label	parent ID	
2	MEGA	Mega Sales		
3	FIN	Finance	MEGA	
4	NAR	Marketing	MEGA	
5				

Figure 5 Example of the parent-child upload

6. Upload of “parent-child” hierarchy definition with contacts assigned to the hierarchy. For this, a contact database must be set up and linked to the hierarchy.

	A	B	C	D	E	F	G
1	Node ID	Node Label	Parent ID	contactic	email	Name	Gender
2	MEGA	Mega Sales		1440	documentation1@confirmit.com	Adam Avia	1
3	MEGA	Mega Sales		1441	documentation2@confirmit.com	Belinda Br	2
4	FIN	Finance	MEGA	1442	documentation3@confirmit.com	Charles Cl	1
5	FIN	Finance	MEGA	1443	documentation4@confirmit.com	David Dun	1
6	FIN	Finance	MEGA	1444	documentation5@confirmit.com	Ellen Eagle	2
7	MAR	Marketing	MEGA	1445	documentation6@confirmit.com	Fred Fulm	1
8	MAR	Marketing	MEGA	1446	documentation7@confirmit.com	Gareth Ga	1
9	MAR	Marketing	MEGA	1447	documentation8@confirmit.com	Helen Haw	2
10	MAR	Marketing	MEGA	1448	documentation9@confirmit.com	Ian Ivorybi	1

Figure 6 Example of a parent-child upload with contacts

Note: The hierarchy management module supports uploading of up to 15 levels in the hierarchy. This means that you can have in total 15 level columns in a “full path” import, with L1:, L2:, …, L15: as the column headers.

1.4. The Hierarchy List

When you go to the Hierarchy Management item in the Authoring Quick Access pane, the Hierarchy List page opens. This page lists all the hierarchies to which you have access.

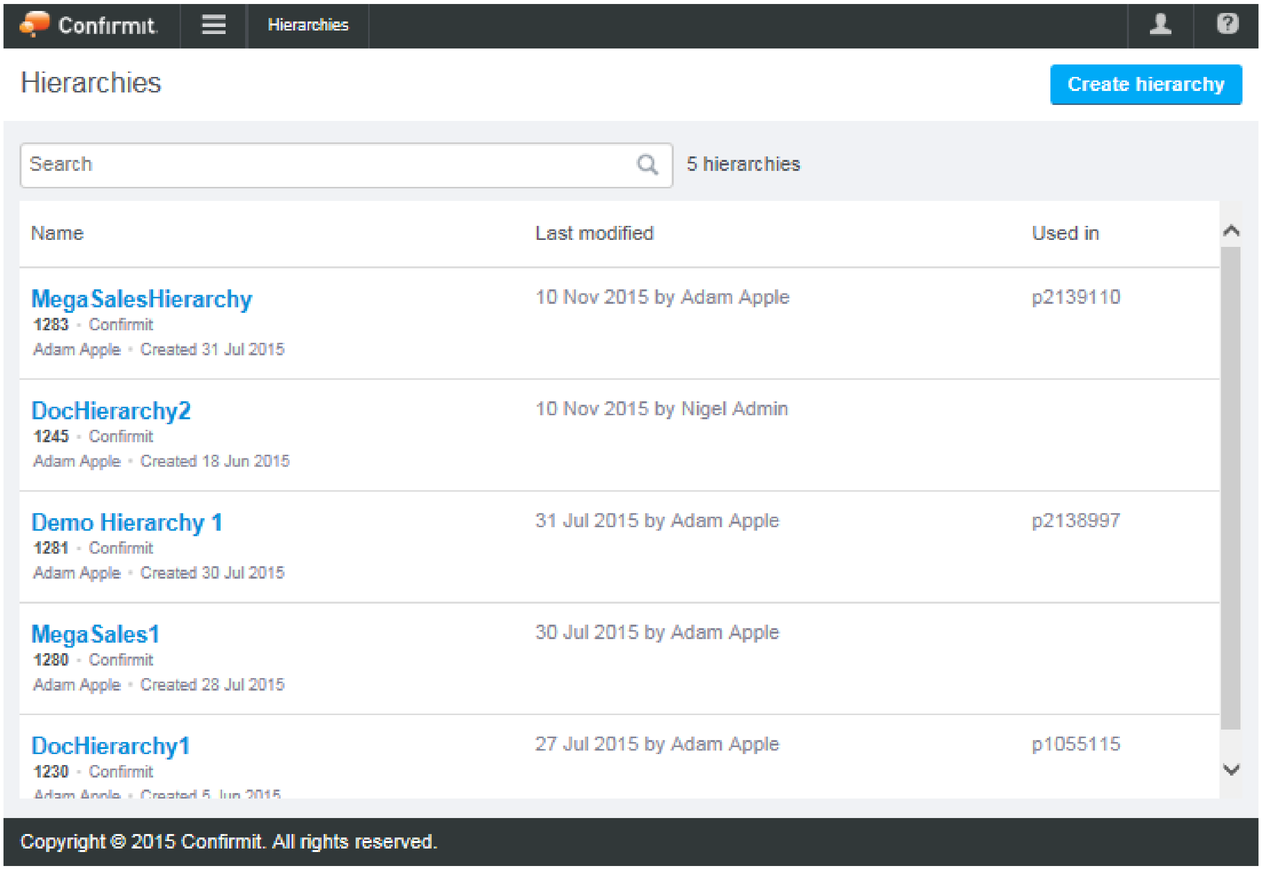


Figure 7 Example of the Hierarchy List

The total number of hierarchies available to you is given beside the Search field. If you use the Search functionality and the filter reduces the list, then this total is adjusted automatically. The list is sorted descending by last modified, so the most recently updated hierarchies will be on top. For each hierarchy, the list shows the hierarchy name (blue text), the Id number (black text below the name), the user who created it, the date it was created and the date it was last modified. In addition, launched surveys and contact databases that use that hierarchy are given in the Used In column.

In the Search box you can type hierarchy name or id. Searching by hierarchy id looks for an identical match (123 will only return hierarchy 123, not hierarchy 1234 etc.). Searching by name will look for anything that contains the specified text.

2. Creating a Hierarchy

You create your hierarchies using the Horizons Hierarchy Management functionality. To access this:

1. In the Authoring quick access pane, go to the **Hierarchy Management** item.

   The Hierarchies page opens. If you have no hierarchies available to you (you haven't created any yourself and no-one has given you permission to access theirs), then the Hierarchies page opens "empty" and you are invited to create one.

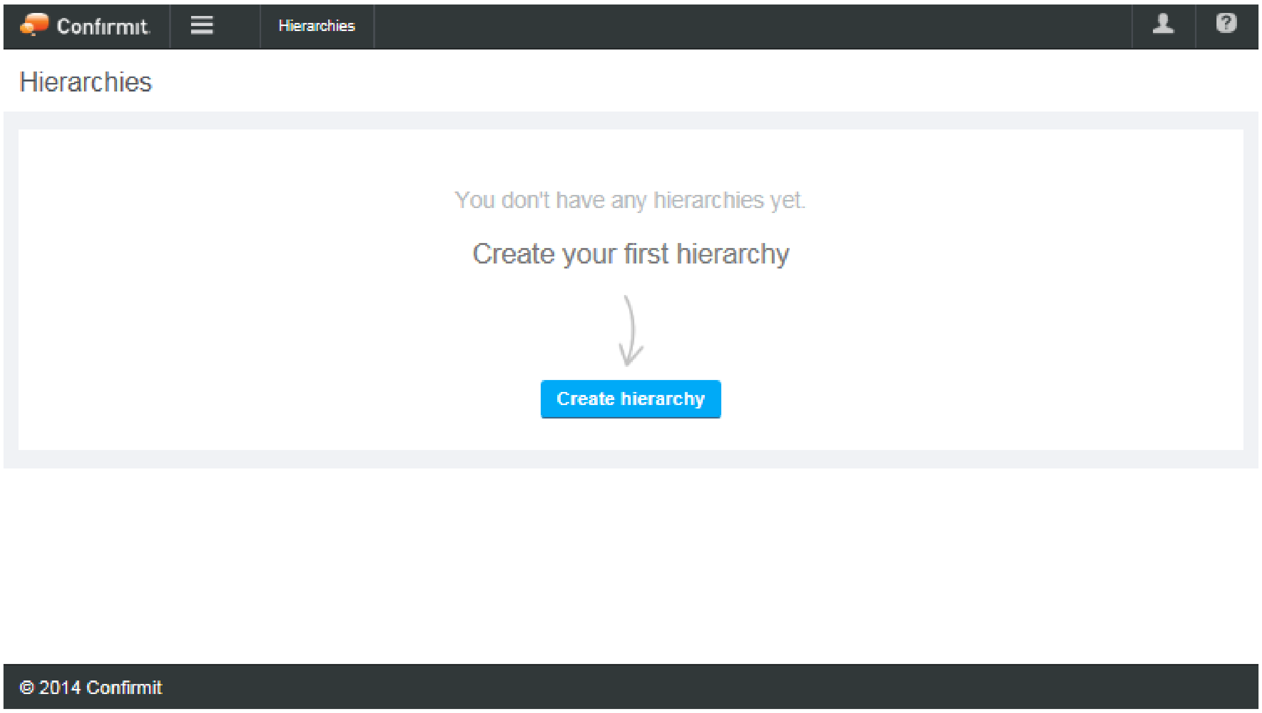


Figure 8 The empty Hierarchies page

   If you already have access to one or more hierarchies then the Hierarchies page opens with those hierarchies listed. Click on a hierarchy name in the list to open that hierarchy for editing (go to Editing the Hierarchy on page 14 for more information). In this case, as you wish to create a new hierarchy:

2. Click **Create hierarchy** and continue the procedure

   The Create hierarchy page opens.

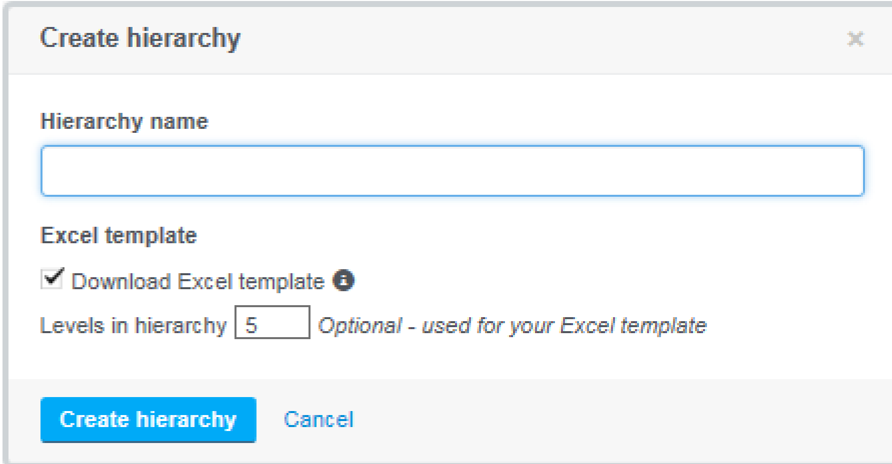


Figure 9 The Create hierarchy page

3. Type a name for your new hierarchy into the Hierarchy name field.

   To simplify the import process an Excel®[2] template is available that can be downloaded to your browser when the hierarchy is created. This template contains the correct column headers for a "full path" import, and will assist you with creating the hierarchy definition in the correct format.

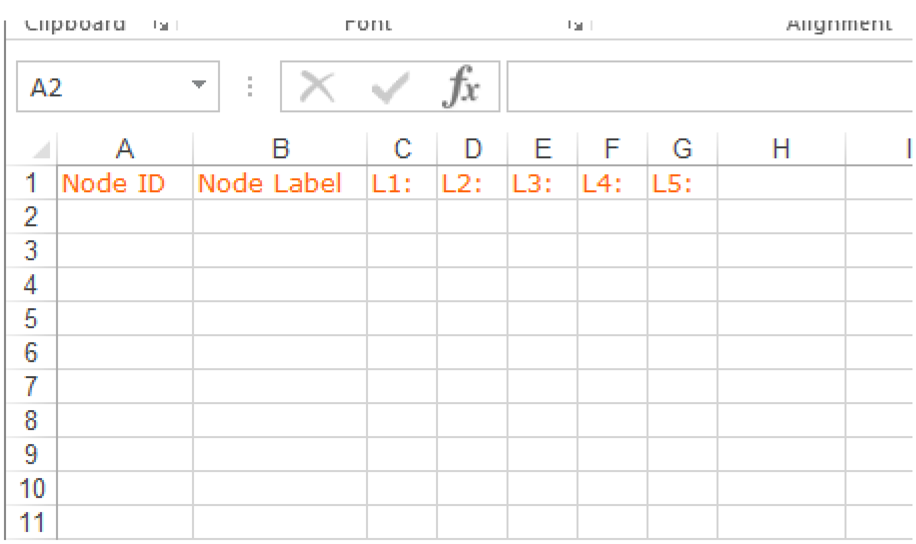


Figure 10 Example of a template file for a hierarchy with 5 levels

4. Uncheck the Download... box if you do not want to use the template.
5. If you use the template, specify the number of levels you wish to have in your hierarchy. Note that you can add more levels to the file as required at any time, regardless of your choice when downloading the template file, as long as you don't exceed the limit of 15 levels. If levels are not needed and one or more of the last columns are empty, they will merely be ignored.
6. Click **Create Hierarchy**.

Once the hierarchy is created you will be asked to import a definition (go to Importing a Hierarchy Definition on page 14 for more information).

[2]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

3. Hierarchy Permissions

The Hierarchy Permissions functionality allows you to specify who can manage and edit the hierarchy and who can only view it. Here you can add users to the list from your company, remove users from the list, and allocate permissions to individual users or groups of users (go to Professional User Permissions on page 8 for more information). If your company has licensed the add-on, you can also allocate permissions to end users (go to End User Permissions on page 9 for more information).

The hierarchy designer (or another user who has been given Manage permission) can give Manage or View permission to other users. Click on **Permissions** in the Hierarchy toolbar to open a menu with two options: **Professional user permissions**, and **End user permissions**. Both Professional Users and End Users have two levels of permission:

- **Manage -** a user with Manage rights has full rights to do anything with the hierarchy; edit it, give permissions etc. These are the same rights as the user who created the hierarchy.
- **View -** a user with View rights can do only that - they can view the hierarchy but they cannot change anything.

Note: Any system administrator will have Manage permission for all hierarchies, but only those users who have explicitly been given access will be listed in the Permissions page.

3.1. Professional User Permissions

The owner (creator) of a hierarchy can allocate Manage or View permissions as appropriate to any Horizons Professional Users registered with the owner's company. If you wish to share the hierarchy with End Users (users from another company), then you must first link an end user list to the hierarchy (go to How to Add End User Permissions to the Entire Hierarchy on page 9 for more information).

3.1.1. How to Add Users to the Permissions List

To add users from your own company to the Permissions list:

1. Click **Add users**.
2. In the Add users overlay which appears, check the boxes beside those users you wish to add to the permissions list for this hub.

   In the event the list is extensive you can type search criteria into the Search field and press **Enter** to search for users whose names begin with the input criteria.

   To acquire a better overview of the users you have selected, click **Show selected**; this removes any names that you have not selected. Click **Show all** to redisplay the full list.
3. For each user you select, click the drop-down arrow in the right column to open the menu, and select the permission you wish to allocate to that user. Note that you can change the permission allocated at any time.
4. When you have selected the users you wish to add to the Permissions list, click **Add users**.

The selected users are added to the Permissions list.

3.1.2. How to Revoke Permissions for Professional Users

You revoke permissions by clicking the red icon at the right of the row where the user is listed on the permission page. When revoking access permissions to hierarchies, different confirmation overlays will be displayed depending on whether you are revoking access for yourself or for others. To reduce the chances of mistakes, in all cases you will need to confirm the action.

Note that you cannot revoke access to a hierarchy for the "last man", otherwise no-one will have access. If another user has Manage permission then you can revoke access for yourself, but a warning is presented to ensure you intend to do this.

3.2. End User Permissions

The End Users functionality is an add-on intended to enable a hierarchy builder in one company to give edit access to the hierarchy to employees of another company. For example, a consultancy company could be engaged to create and manage a client company's hierarchy. As the client company employees will usually have a better overview of their own company, the consultancy company would give end user permissions to specified employees in the client company so they can make corrections to the hierarchy to keep it updated etc.

Two levels of end user permission can be allocated:

- **Manage -** a user with Manage rights has rights to edit the hierarchy and contacts; add, move, edit and delete nodes, and move edit and delete contacts.
- **View -** a user with View rights can do only that - they can view the hierarchy but they cannot change anything.

End Users can be given manage or view access to the entire hierarchy, or they may be given manage or view access to specific nodes. Node permissions include the specific node and all sub-nodes below it in the hierarchy, but not nodes above or other nodes on the same level.

3.2.1. How to Link an End User List to the Hierarchy

If End User permissions are to be used, then the hierarchy must be associated with an End User List. Before you can make this association, you must first have (or create) an End User List - refer to the Authoring User Guide for details on creating an End User List. To associate the End User List to the hierarchy, you must then link the End User List to the hub that the hierarchy is linked to. To link an End User List to a hub:

1. In Authoring, go to the **End Users > Lists** menu item.

   A list of the end user lists available to you opens.

2. Browse to and select the end user list you wish to link to the hierarchy.
3. On the General tab, type into the SmartHub Id field, the id of the hub that the hierarchy is linked to.

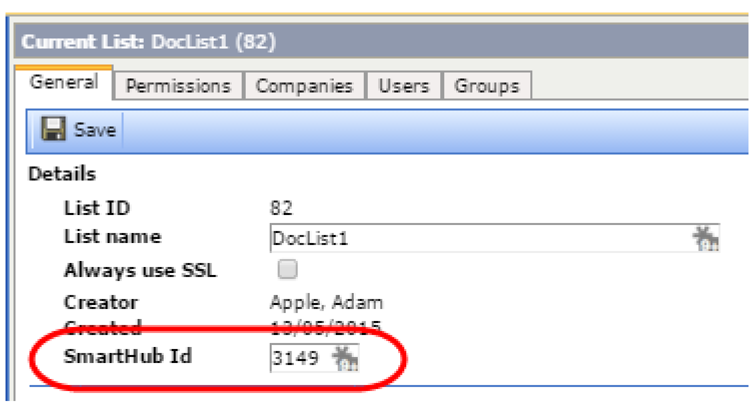


Figure 11 Setting the SmartHub Id to link the End User list to the hierarchy

4. Save the changes.

3.2.2. How to Add End User Permissions to the Entire Hierarchy

Once you have an end user list linked to the hierarchy (go to How to Link an End User List to the Hierarchy on page 9 for more information), to allocate end user permissions to the entire hierarchy:

1. Open the hierarchy, then go to the **Permissions > End user permissions** menu command.

   The End user list page opens, showing any end users who already have permissions. The name and ID number of the end user list in use is displayed at the top of the page.

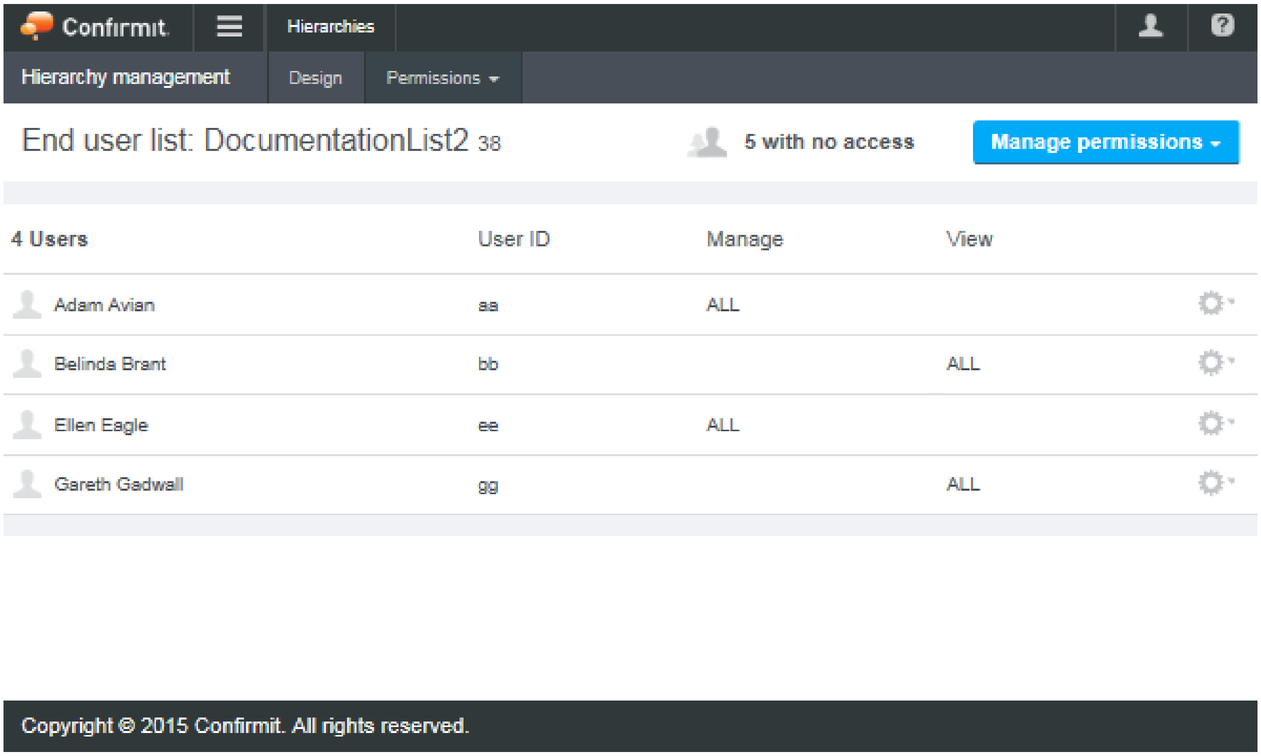


Figure 12 The End user list page showing some end users who have been allocated permissions

2. In the upper-right corner, click **Manage Permissions** and select **Add**.

   The Add Permissions for End Users overlay opens.

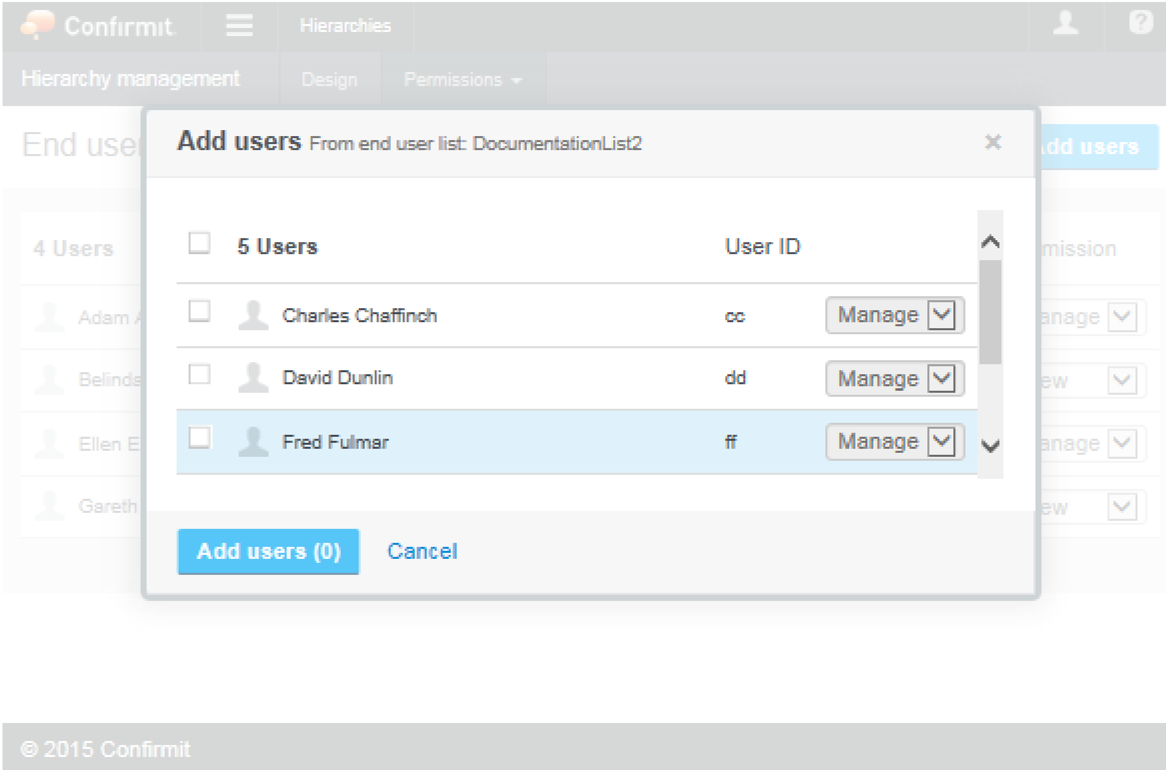


Figure 13 The Add Permissions for End Users overlay

3. Check the box beside the end user you wish to allocate a permission to, and select the desired permission from the drop-down list.
4. Once you have selected and allocated permissions to the required end users, click **Add users**.

   The selected end users are added to the list shown on the End user list page.

3.2.3. How to Add End User Permissions to Specific Nodes

Once you have an end user list linked to the hierarchy (go to How to Link an End User List to the Hierarchy on page 9 for more information), to allocate end user permissions to specific nodes in the hierarchy:

1. Open the hierarchy, then go to the **Permissions > End user permissions** menu command.

   The End user list page opens, showing any end users who already have permissions. The name and ID number of the end user list in use is displayed at the top of the page.
2. In the upper-right corner, click **Manage Permissions** and select **Upload**.

   The Upload Excel®[3] File overlay opens.

[3]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

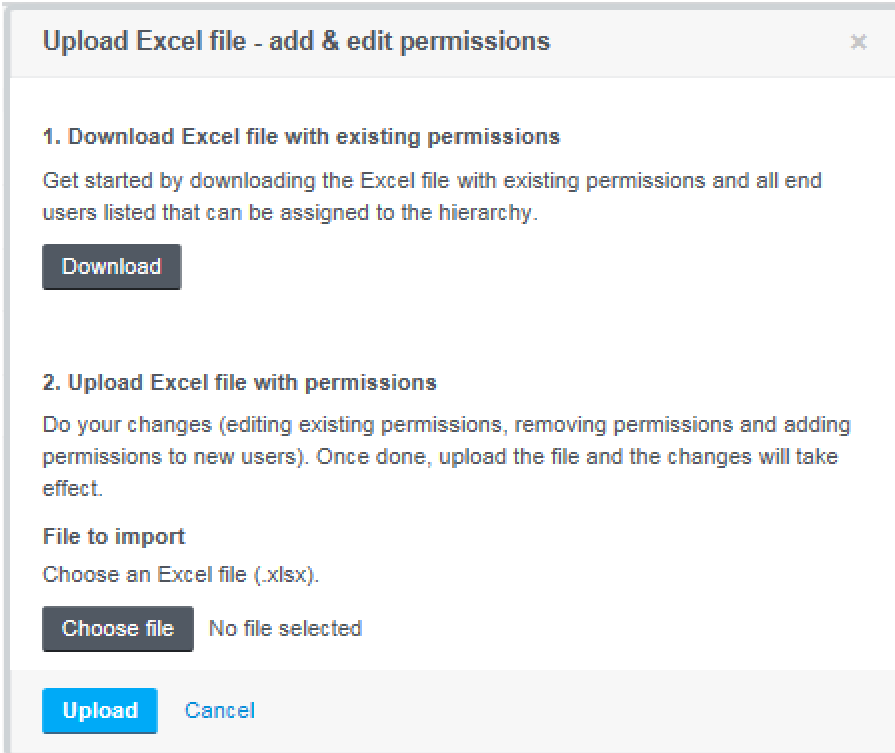


Figure 14 The Upload Excel File overlay

Start by downloading an Excel file to use as a template for the permission upload.

3. Click **Download**, and open the spreadsheet that is delivered to the browser.

	A	B	C	D	E	F
1	Node ID	Node Label	L1:	L2:	Viewers	Managers
2			<Full access to hierarchy>		bb, gg	aa, ee
3	MEGA	Mega Sales	Mega Sales			
4	FIN	Finance	Mega Sales	Finance		
5	MAR	Marketing	Mega Sales	Marketing		
6						
7						

Figure 15 Example of the Permissions file

Tip
The spreadsheet includes a tab that contains the user names, first names, last names and emails of all end users in the end user list; information that may be helpful when setting up permissions.

4. In the “Viewers” and “Managers” columns, list the user names of the end users who are to have “View” or “Manage” access respectively. If the users are to have access to the entire hierarchy, add the user names to the row with “<Full access to hierarchy>”; if they are only to have access to specific nodes, then add them to the appropriate node row.

   If an end user is to have access to several nodes, then add the user name to as many rows as required; the same end user may be listed in several rows. Several end users may be listed in the same cell; separate the user names with commas. Note that “Manage” permission will trump “View” permission if assigned to the same end user for the same node(s).

5. Once you are happy with the permissions, save the spreadsheet to disk.
6. Return to Hierarchy Management, click **Choose File**, browse for the file and select it, and then click **Upload**.

   The End User Permissions page now shows a list of all end users who have been granted View or Manage permissions to the hierarchy and the list nodes to which they have been given node permissions, or "ALL" if they have been granted permissions to the entire hierarchy.

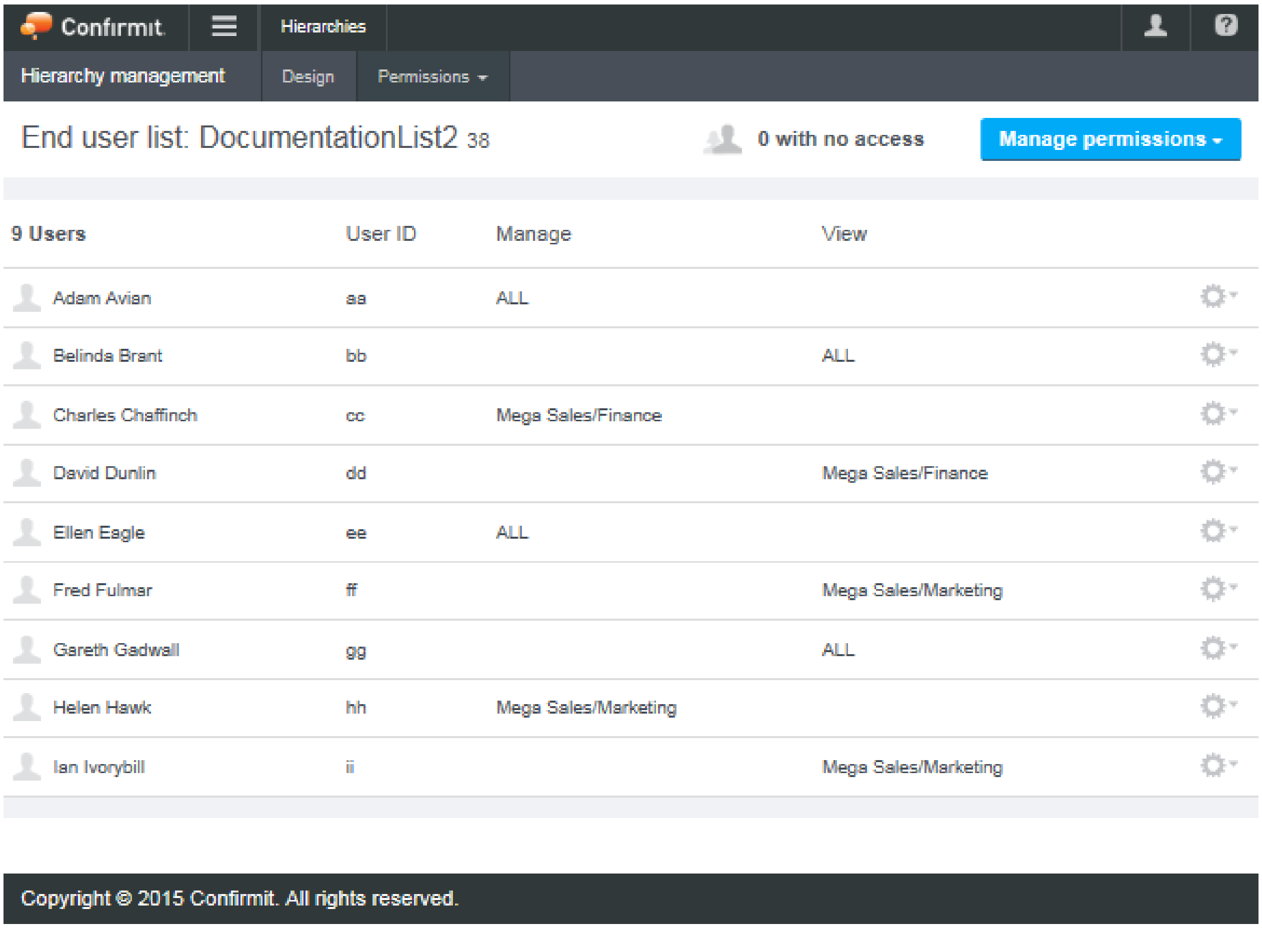


Figure 16 Example of the updated End User List

Re-uploading the hierarchy permissions will set the permissions only for the nodes listed in the upload. This means any existing permissions for nodes in the upload will be removed. For nodes not specified in the upload the permissions will not be altered.

3.2.4. How to Revoke Permissions for End Users

You can revoke permissions in the end user permissions list by clicking the red icon at the right end of the row where the user is listed. Alternatively, when uploading end user permissions, empty cells will overwrite whatever existing permissions you have set, so you can also revoking permissions through the permission file upload.

4. Editing the Hierarchy

Once the hierarchy exists you can start building the hierarchy by importing a hierarchy definition, and then do further editing in the user interface as required. You can add, move and delete child nodes, change node labels, delete and edit contacts and move them between nodes.

Depending on what permissions you have been assigned for the hierarchy, you may see the full hierarchy definition or just a subset of hierarchy nodes, and you may have been granted View permission or Manage permission for the nodes. View, indicated with an “eye” icon, gives you access to look at the details without being able to change anything, While Manage, indicated with a “cog wheel”, gives you access to add, move and delete child nodes, change node labels, delete and edit contacts and move them between nodes if the hierarchy has been set up with contacts.

Note that when you add a child node to a parent node in the hierarchy, it will be added below any existing child nodes. You cannot re-order or sort the nodes. Note also that while you can import a hierarchy that has more than one top level, you cannot add another top level “manually”; you can only add child nodes.

4.1. Importing a Hierarchy Definition

The hierarchy definition defines the actual structure of the hierarchy; how the various nodes are related to each other. A basic definition in the form of an Excel®[4] file must be uploaded, but this can be edited as necessary later.

When you are in the Hierarchies page, click on a blue hierarchy name link to open that hierarchy. If the hierarchy does not yet contain a definition, a page opens inviting you to import the Excel file.

Important
If you intend to import a hierarchy with contact data, do not upload the hierarchy definition at this point - there are several other things that you must ensure are in place first (go to Importing the Hierarchy and Contacts on page 16 for more information).

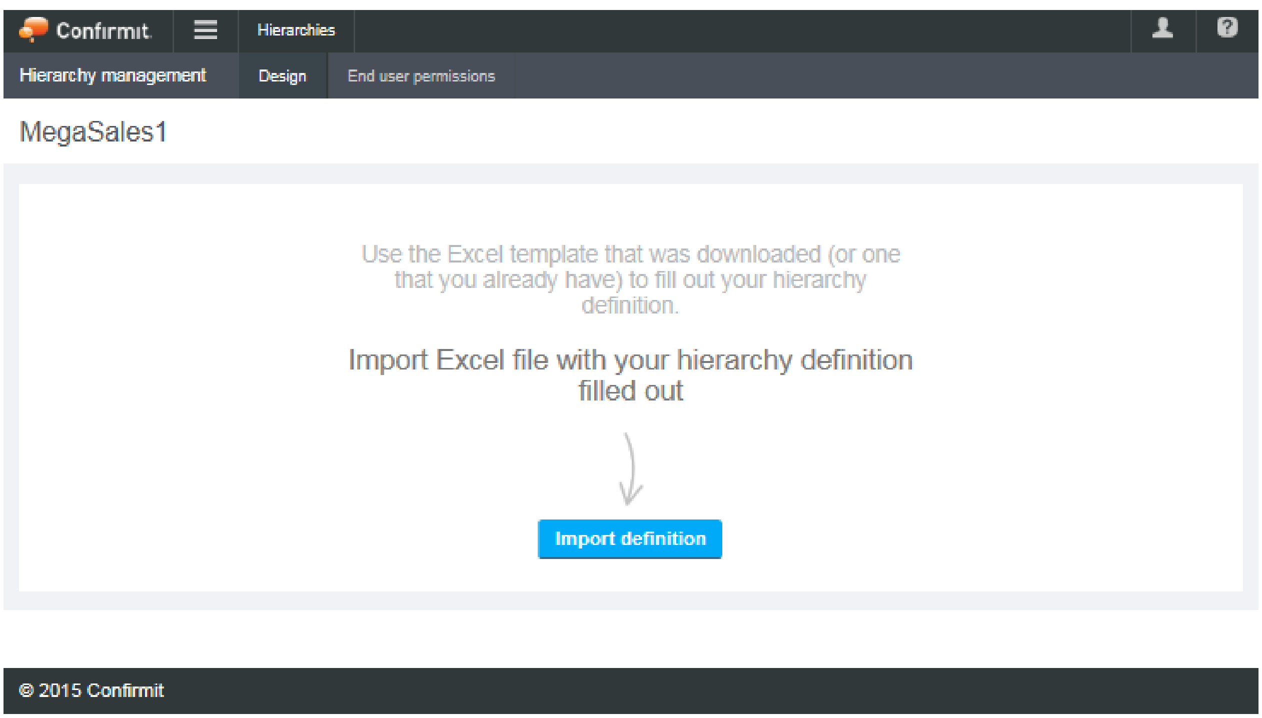


Figure 17 The opening page if your hierarchy does not yet contain a definition

1. Click **Import definition**.

[4]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

The Import Hierarchy Definition overlay opens.

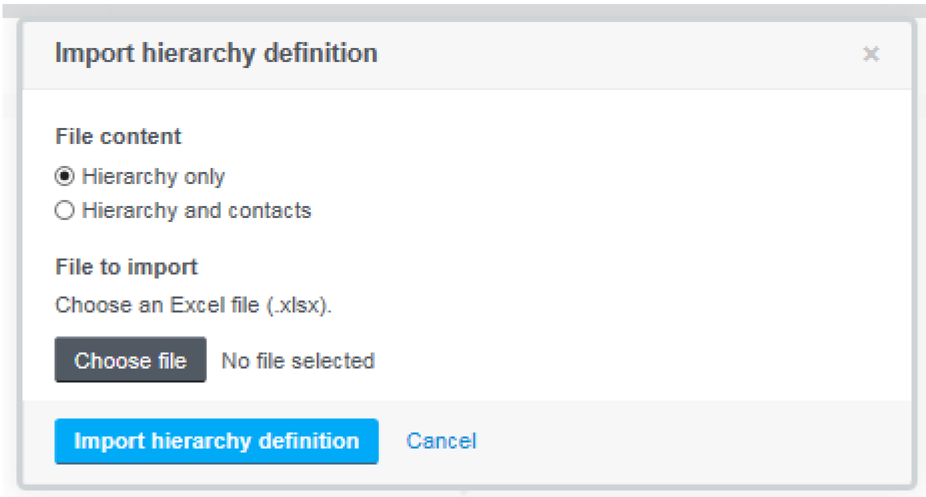


Figure 18 The Import Hierarchy Definition overlay

Here you have two options; you can import just a hierarchy definition, which includes the layout and nodes and can include Node IDs and labels (go to Importing Only the Hierarchy on page 15 for more information), or you can import both the hierarchy definition and a contact database. Note that in this case the hierarchy must be linked to a contact database first (go to Importing the Hierarchy and Contacts on page 16 for more information).

4.1.1. Importing Only the Hierarchy

To import only the hierarchy definition:

1. Select the **Hierarchy Only** option.
2. Click **Choose file**.
3. A standard file selection window for your browser opens.
4. Browse to and select the desired .xlsx file, then click **Open**.
5. The Import hierarchy definition overlay returns with the selected file named in the overlay.
6. Click **Import hierarchy definition**.
7. The hierarchy is imported

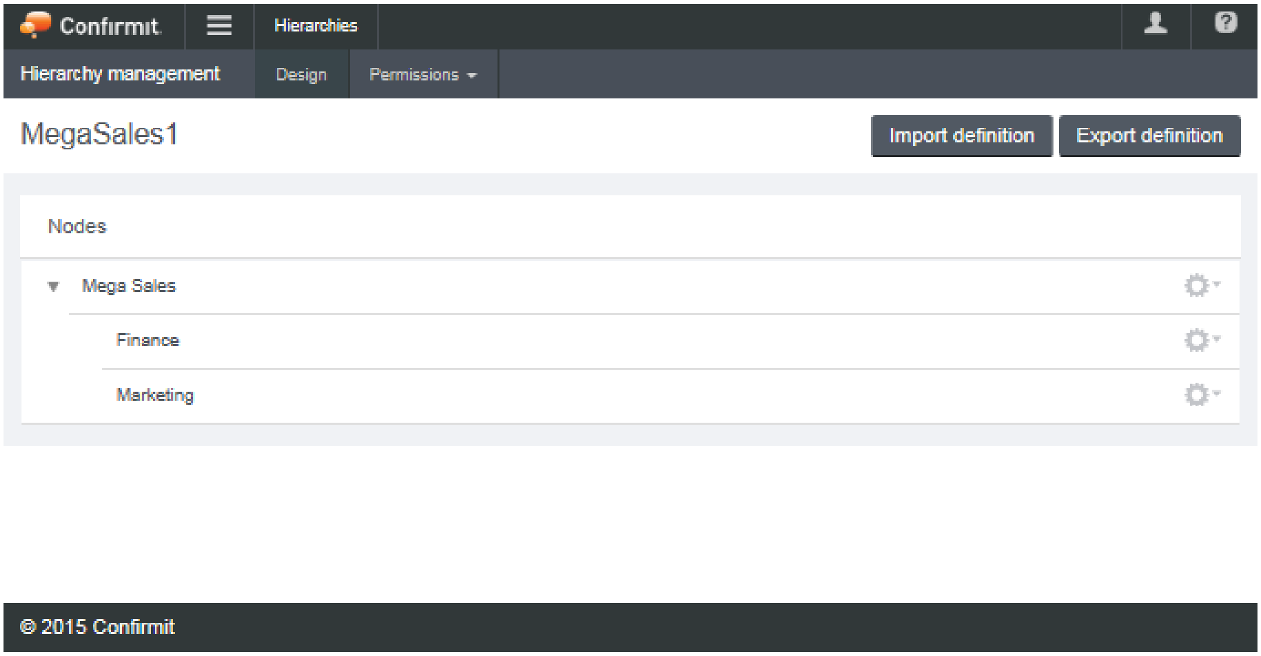


Figure 19 The imported hierarchy

You can now edit the hierarchy (go to Editing the Hierarchy on page 14 for more information) and allocate permissions (go to Hierarchy Permissions on page 8 for more information). Note that the nodes are imported and presented in the same order as they were in the Excel®[5] definition file; you cannot re-order or sort the nodes. Note also that you can import a hierarchy that has more than one top level, but you cannot add another top level "manually"; you can only add child nodes.

4.1.2. Importing the Hierarchy and Contacts

If you wish to import the hierarchy definition and contacts, the procedure is a bit more complicated. You must first have a SmartHub and a contact database (refer to the separate SmartHub User Guide for details). The contact database must include fields that match the fields in the hierarchy definition file, and it must have a hierarchy question (single) with its Answers property set to Hierarchy Lookup and the hierarchy selected in the Answers tab (refer to the separate Authoring User Guide for details).

The procedure given below assumes you have none of these so describes every step in the process. In the event you already have a requisite in place and set up correctly, go straight to the next step in the procedure. The procedure is based on a fictitious company called Mega Sales that has a simple 2-level hierarchy with 9 employees.

1. Having created your hierarchy, make a note of the hierarchy name - in this case, MegaSalesHierarchy.

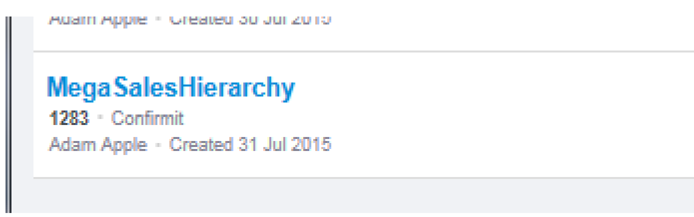


Figure 20 The currently-empty hierarchy in the Hierarchies list

Note: Do not at this stage import the hierarchy definition.

[5]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

2. Create the hierarchy definition Excel®[6] file.

   This can be as complicated or simple as necessary - you can edit it within the hierarchy management functionality later once everything is set up. Or if you wish you can export the definition, edit it “externally” then re-import it.

   The hierarchy definition must be in the first columns. For contacts data, a contactid is mandatory. Other fields are optional, but it is recommended to have one column named “name” and one named “email”, because these will be shown in the hierarchy editor if they are present.

	A	B	C	D	E	F	G	H
1	Node ID	Node Label	L1:	L2:	contactid	email	Name	Gender
2	MEGA	Mega Sales	Mega Sales		1440	documentation1@confirmit.com	Adam Avian	1
3	MEGA	Mega Sales	Mega Sales		1441	documentation2@confirmit.com	Belinda Brant	2
4	FIN	Finance	Mega Sales	Finance	1442	documentation3@confirmit.com	Charles Chaffinch	1
5	FIN	Finance	Mega Sales	Finance	1443	documentation4@confirmit.com	David Dunlin	1
6	FIN	Finance	Mega Sales	Finance	1444	documentation5@confirmit.com	Ellen Eagle	2
7	MAR	Marketing	Mega Sales	Marketing	1445	documentation6@confirmit.com	Fred Fulmar	1
8	MAR	Marketing	Mega Sales	Marketing	1446	documentation7@confirmit.com	Gareth Gadwall	1
9	MAR	Marketing	Mega Sales	Marketing	1447	documentation8@confirmit.com	Helen Hawk	2
10	MAR	Marketing	Mega Sales	Marketing	1448	documentation9@confirmit.com	Ian Ivorybill	1
11								
12								

Figure 21 The MegaSales hierarchy file with contacts

3. Go to SmartHub and if you do not already have the hub you wish to use, create a new hub. Refer to the separate SmartHub User Guide for further details.
4. Make a note of the hub name and ID. These are located at the top of the SmartHub window.

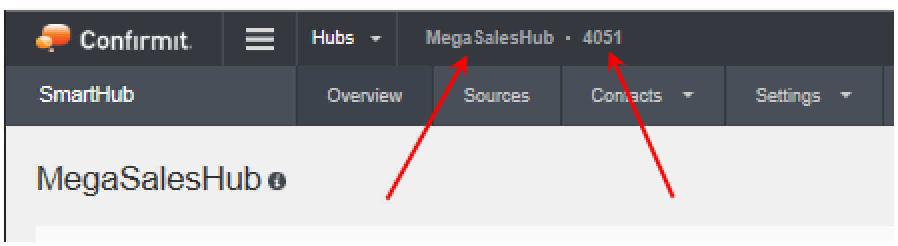


Figure 22 Example of the SmartHub name and ID

5. If you do not already have the contact database you wish to use, create a new contact database. Refer to the separate SmartHub User Guide for further details.
6. In Authoring, go to **Contact Database Setup > Designer** and add questions to the contact database that match the fields you have in your hierarchy definition file, for example email (open text), name (open text), gender (single) etc.

   The variable names must match the column headers you have in your file. The contact database will already have a system field for the contactid (unique id, such as for example employee number), so you do not need to add that.

7. Add a hierarchy question and link it to the hierarchy you set up in step 1.

   To do this, add a single question, go to its **Properties** and set “Answers” to “Hierarchy lookup”. In the question’s Answers tab, select Schema name and Hierarchy to be the hierarchy you set up in step 1 of this procedure.

[6]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

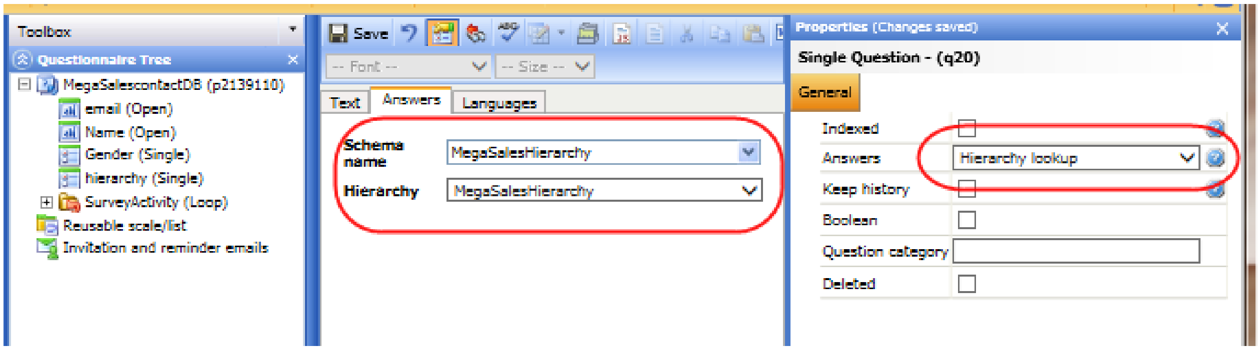


Figure 23 Setting up the Hierarchy question in the contact database

8. Generate the contact database.

9. Go back to Hierarchy Management to the hierarchy you created in step 2 of this procedure, and import the hierarchy definition you created in step 3. Note in the hierarchy list that your hierarchy is now linked to the contact database.

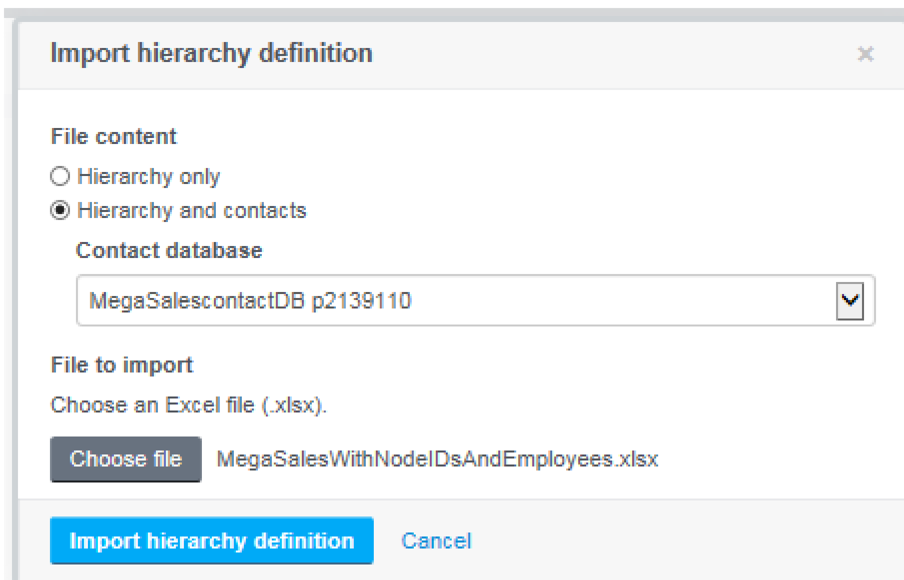


Figure 24 Importing the hierarchy and contacts

The Hierarchy Management page opens with your hierarchy and the imported contacts.

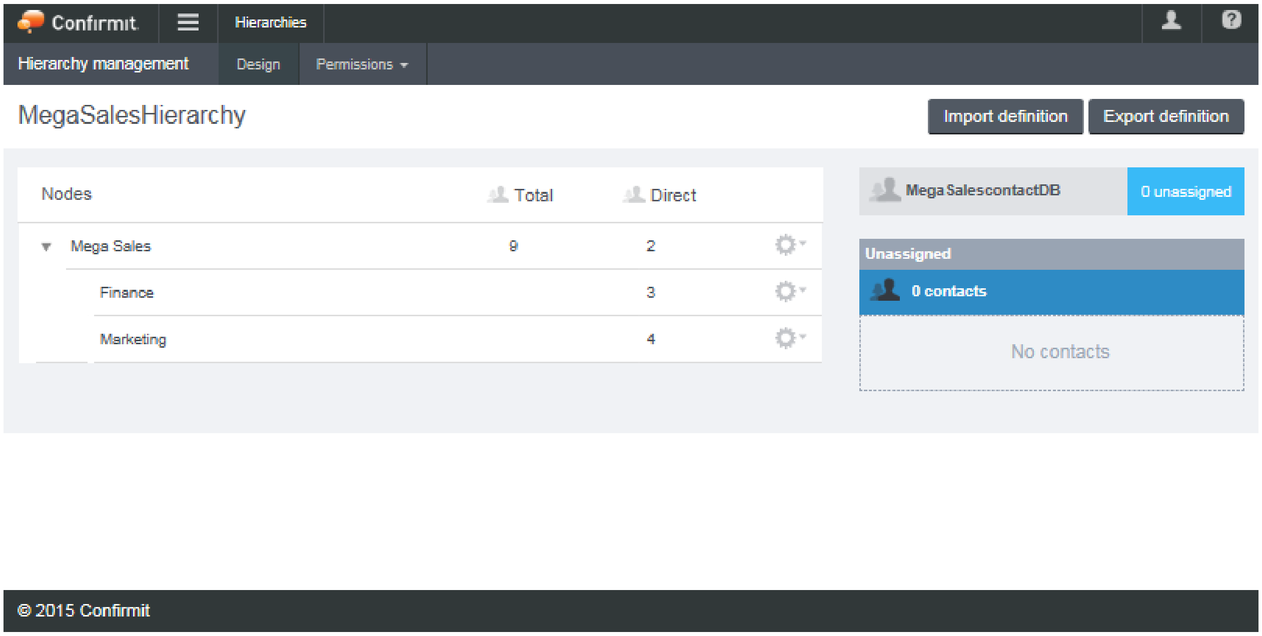


Figure 25 The hierarchy with contacts

Click on a node to view and edit the contacts in that node.

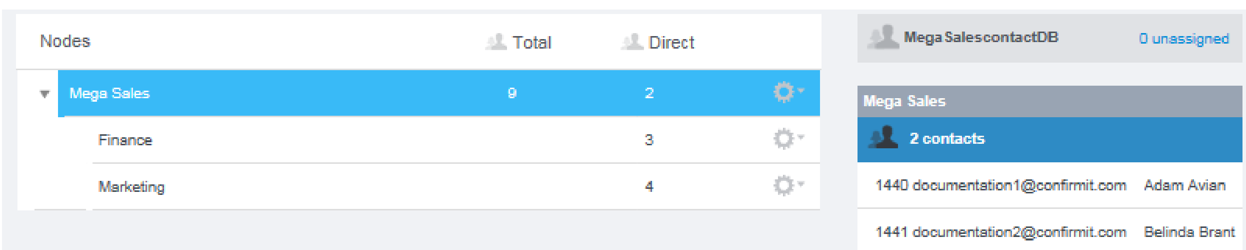


Figure 26 The contacts in the Mega Sales node

The Contacts area shows the ID, email and name (if provided) for the contacts in the selected node.

- **Total -** the total number of contacts registered in this node and its child nodes.
- **Direct -** the number of contacts directly related to each child node. Note that there will be a Direct column for each level in the hierarchy.
- **Unassigned -** if you are unsure of where in the hierarchy a contact should be, you can drag the contact to the Unassigned field. Someone else (who has been given Manage permission (go to Hierarchy Permissions on page 8 for more information)) can then place the contact in the correct node. Also, if a contact in the hierarchy definition has no Node ID and Label, then the contact will be placed into the Unassigned field automatically on upload.

You can move contacts to different nodes, view and edit node details and add child nodes (go to Editing the Hierarchy on page 14 for more information).

4.1.3. The Error File

If something is incorrect in the upload file, the system will provide a list of errors which can be opened in the user interface. An Excel®[7] file with a tab that lists the errors is also provided. This includes highlighting and linking so you can easily find the cells containing the errors, which you must correct before re-uploading the file.

4.1.4. Uploading Files to an Existing Hierarchy Definition

The hierarchy management module supports uploading data multiple times, and thus supports both the extending and updating of hierarchy definitions and contacts with new data.

Note that re-uploading a hierarchy file can alter the hierarchy or contacts:

- Nodes can be renamed
- Nodes can be moved to either existing nodes or new nodes.
- New nodes can be added
- Contacts can be added
- Contacts can be moved to another node
- Contacts can be updated

However nodes and contacts cannot be deleted by re-uploading a file.

To update the labels of existing nodes, the upload file must include node ids (or else there is nothing to match on). Node ids are case insensitive and will be stored in lower case. If node ids are included, the system will update nodes that already exist, and insert nodes for which there are no matching node ids.

The contactid column is mandatory for any upload involving contacts. If contact id is included, the system will update the existing record for a contact id that already exists, or add a new contact when there is no matching contactid in the database already.

4.1.5. The Import Log

The Import Log lists all the imports that have been made to the hierarchy, in order of date/time with the latest import at the top of the list.

To open the page, click **Import Log**.

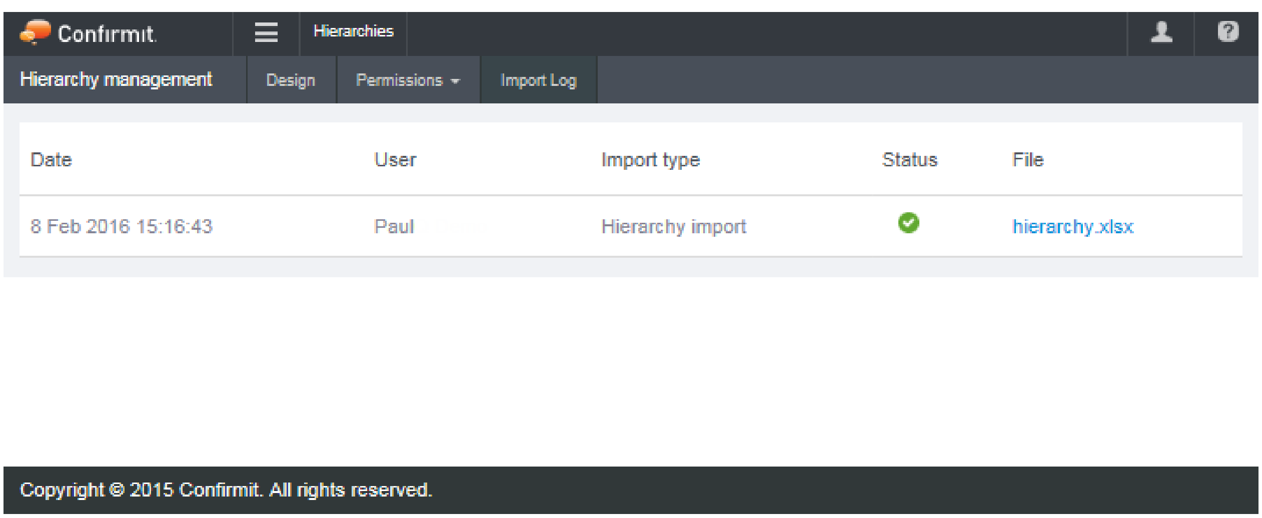


Figure 27 Example of the Import Log page

[7]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

If you wish to download an imported XLS file (perhaps you wish to edit the file and re-import it to update the hierarchy), click the blue file name.

For successful imports, the file uploaded will be available for download. For imports that fail with errors, you can download a file where the original content is augmented with error messages and where cells with issues are highlighted. This makes it possible to investigate issues from file uploads also some time after the upload was done, or easily have other people reviewing uploads that failed.

4.2. How to Export a Hierarchy

Once the hierarchy exists you can export a hierarchy definition as an .xlsx file. You can then edit the file as necessary in Excel®[8] before re-importing it, or import it into a different Horizons setup. The hierarchy definition can be exported in two different formats, either "full path", in which relations between nodes are described in the level columns L1, L2, L3,…, or "parent-child" where the relations between nodes are described by specifying the parent for each node (and no parent for a top node).

To export a hierarchy definition:

1. When in the relevant hierarchy, click **Export definition**.

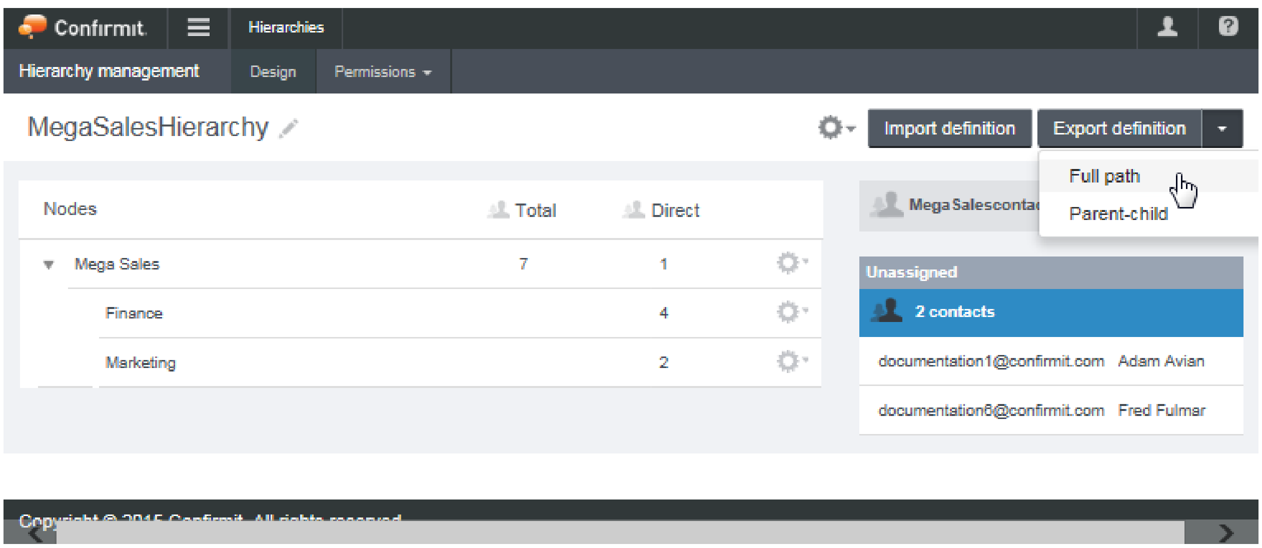


Figure 28 Exporting a definition - 1

2. Choose between "Full path" and "Parent-child".

- **Full path -** exports the full table showing the node ids, node labels and all the various levels.
- **Parent-child -** exports a list of the nodes with the number of child contacts under each node.

  For both options, the Open/Save dialog opens towards the bottom of the Horizons window.

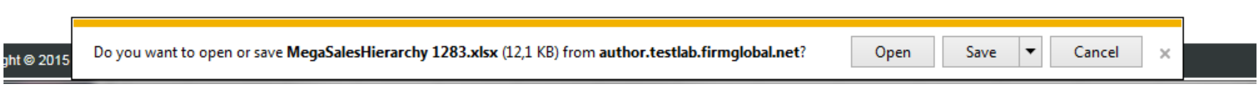


Figure 29 Example of the Open/Save dialog

3. Select **Open** or **Save** (Save, Save as, or Save and open) or **Cancel** as required.

   If you select Open then Excel® opens with the definition.

[8]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

	A	B	C	D	E
1	Node ID	Node Label	L1:	L2:	
2	MEGA	Mega Sales	Mega Sales		
3	FIN	Finance	Mega Sales	Finance	
4	MAR	Marketing	Mega Sales	Marketing	
5					
6					

Figure 30 Example of a Full Path definition export

	A	B	C	D	E
1	id	__l9	parent		
2	MEGA	Mega Sales			
3	FIN	Finance	MEGA		
4	MAR	Marketing	MEGA		
5					
6					

Figure 31 Example of a Parent-child definition export

If you select **Save**, the file is saved by default in your Download folder with the filename as given in the Open/Save dialog. From here you can open and edit the file etc.

4.3. How to Rename a Hierarchy

Note: To be able to rename a hierarchy you must have Manage permission for that hierarchy.

To rename a hierarchy:

1. Open the hierarchy you wish to rename.
2. Click the pen icon next to the hierarchy name on the Design page.

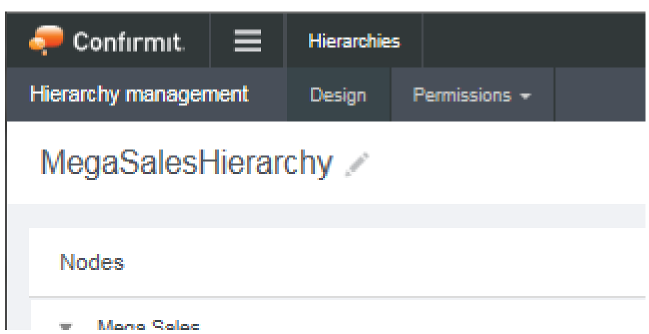


Figure 32 Changing the hierarchy name

3. Change the name, and either press **Enter** or tab or click out of the field to save the changes.

   If you want to cancel the changes before you have saved, press **Escape** (ESC).

4.4. How to Delete a Hierarchy

Note: To be able to delete a hierarchy you must have Manage permission for that hierarchy.

To delete an unwanted hierarchy:

1. Open the hierarchy you wish to delete.
2. Click the cog-wheel icon to open the drop-down and click **Delete hierarchy**.

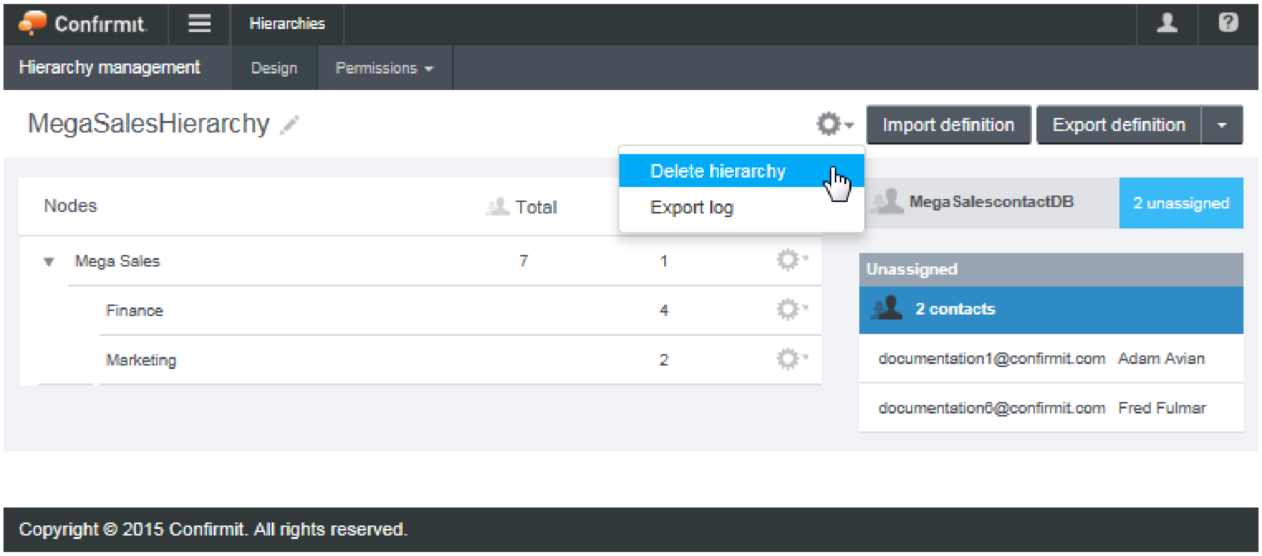


Figure 33 Deleting a hierarchy

If the hierarchy is used in any surveys, panels or contact databases, a warning message will be presented to inform you that these will stop working.

The confirm deletion dialog opens.

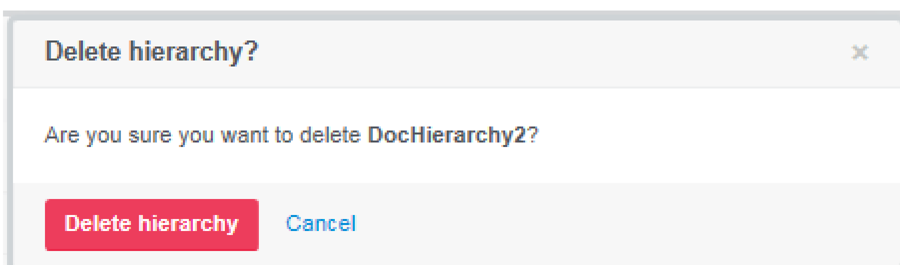


Figure 34 The confirm deletion dialog

3. Cancel, or select **Delete hierarchy** to remove the hierarchy from the system.

   Once deleted, the hierarchy will be unavailable from the hierarchy list from Authoring and Reporting.

4.5. Searching for Nodes and Contacts

In the event your hierarchy is extensive, to simplify editing you can search by node label or ID, or the contact details shown (email, name) or contactid. To search by node name, type a character string into the Search field to display a list of the nodes containing that string.

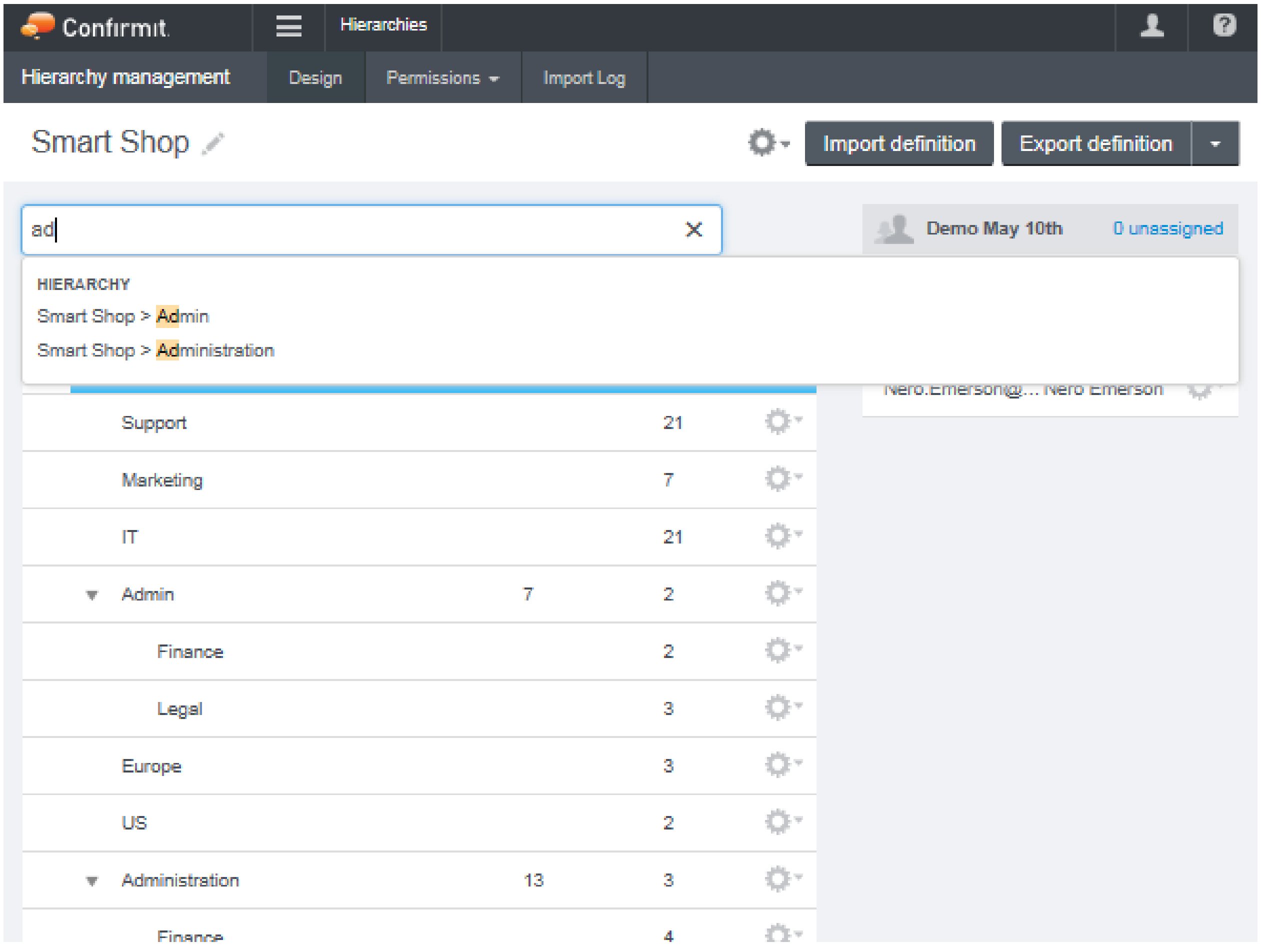


Figure 35 Searching for nodes in a hierarchy

- Click on a node in the “found” list to go to that node.
- To find an ID there must be an exact match, whereas for labels the search will return any item that contains the string of characters that you type into the search field.
- For end users who have access permission to only parts of the hierarchy (node permissions), the search will only be conducted within the parts of the hierarchy they have access to.
- You can also open the hierarchy at a specific node. If you know the node ID number, type a / character followed by that number into the URL in the browser address bar to go directly to that node.

Figure 36 Opening at a specific node

4.6. The Node Edit Menu

Each node in a hierarchy can be edited independently of the other nodes, and has its own **Edit** menu to facilitate this.

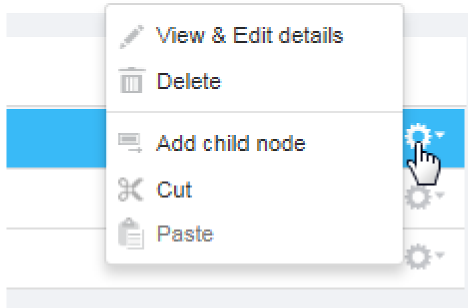


Figure 37 The Edit menu for a node

- **View and Edit details -** here you can view the node id and the label, and edit the label as required (go to Viewing and Editing Node Details on page 25 for more information).
- **Delete -** delete the node and any child nodes it may contain (go to How to Delete a Node on page 25 for more information).
- **Add child node -** add a child node to the current node (go to How to Add a Child Node on page 26 for more information).
- **Cut/paste -** move child nodes from one higher-level node to another (go to Cutting and Pasting Nodes on page 27 for more information).

4.6.1. Viewing and Editing Node Details

Each node has its own Details overlay showing the node ID and label, and allowing you to edit the label. To open this overlay, click on the edit icon for the node and select **View and Edit details**.

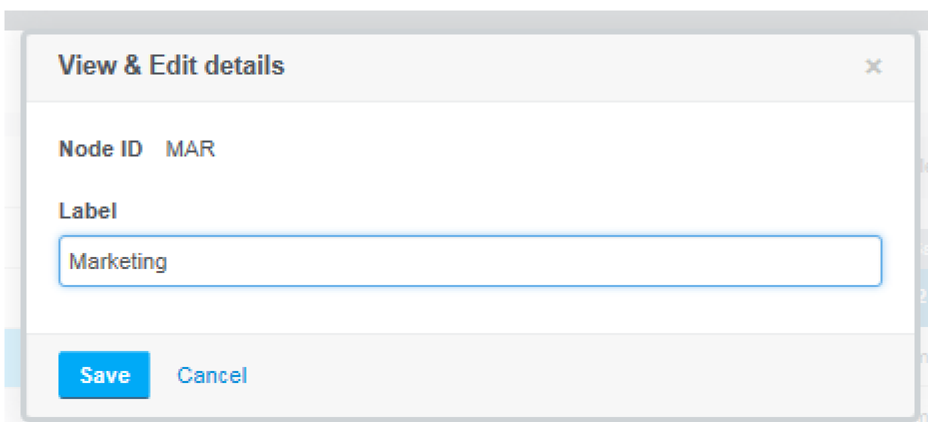


Figure 38 Example of a Node Details overlay

4.6.2. How to Delete a Node

1. Click on the Edit icon for the node to open the **Edit** menu, and select **Delete**.

   An overlay opens asking you to confirm the deletion.

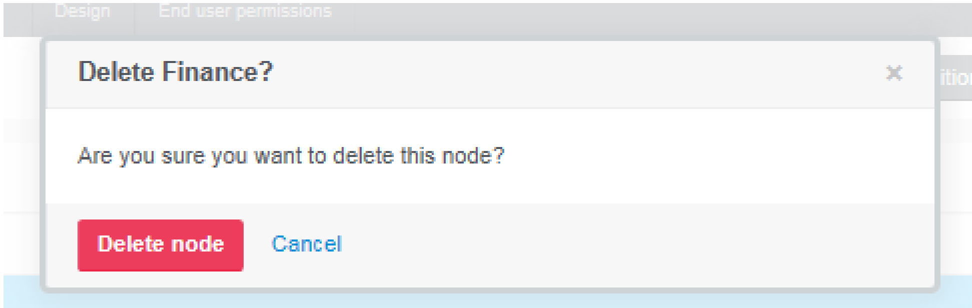


Figure 39 The confirmation overlay

If the node you are deleting has child nodes then a warning is displayed to ensure you are aware of this.

Note: If contacts are assigned to the node or any of its child nodes, you will not be allowed to delete the node. You must first move (go to Moving Contacts Between Nodes on page 27 for more information) or delete (go to Deleting Contacts on page 30 for more information) all contacts assigned to the node or any of its child nodes.

2. To confirm the deletion click **Delete node**.

4.6.3. How to Add a Child Node

You can add child nodes to existing nodes in any location within the hierarchy. Note that you cannot add a node such that it becomes another "top-level" node.

1. Find the node into which you wish to add a child node.
2. Click on the **Edit** icon for the node to open the **Edit** menu, and select **Add child node**.

   The Add child node overlay opens.

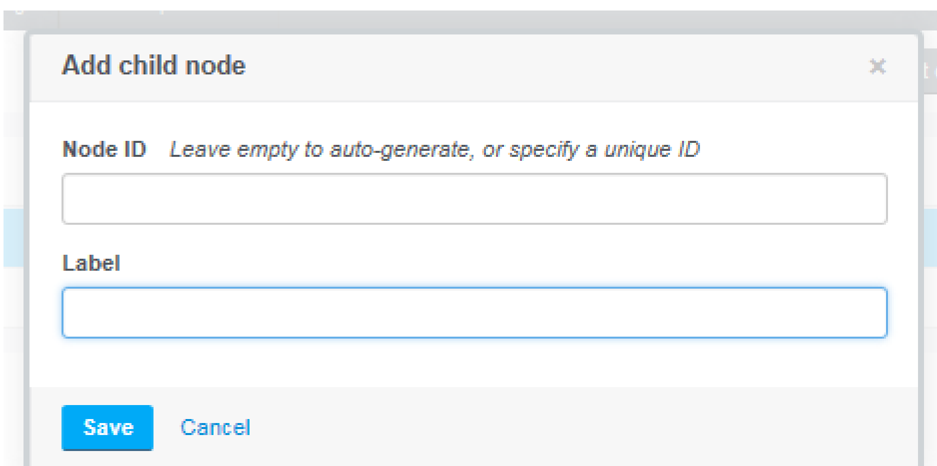


Figure 40 The Add child node overlay

3. The Node ID must be unique for the hierarchy. Type in an ID, or leave the field empty if you want the system to generate an ID automatically.
4. Type in the label you wish to use for the node.
5. Click **Save**.

The child node is created and added to the hierarchy

4.6.4. Cutting and Pasting Nodes

Once the hierarchy is created, you can move nodes around using the cut-and-paste functionality. Note that you can only paste nodes into other nodes; you cannot move a node such that it becomes another “top-level” node. Also, you cannot re-order the child nodes within a parent node.

1. Click on the **Edit** icon for the node to open the **Edit** menu, and select **Cut**.

   The node (including any child nodes it may contain) is grayed out.

2. Click on the parent node into which you wish to paste the node.
3. Click **Paste**.

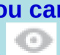
   The node (and any child nodes it may contain) is pasted into the selected node. Note that the incoming node will be pasted below any other child nodes that are already in the selected parent node.

All contacts in the node and any child node it may contain will automatically be moved along with the node(s). The Total and Direct count values will be updated on completion of the move.

4.7. Moving Contacts Between Nodes

If you have contacts assigned to your hierarchy, you can easily move them between nodes in the event of job changes etc. To do this:

1. Open the hierarchy.
2. Expand the nodes as necessary so you can see, in the Contacts area, the contact(s) you wish to move.

Note: If you can see a  icon for a node then you have Manage permission and can edit the contacts. If you see a  icon, then you only have View permission and cannot change anything.

1. Click on the contact (note that you can press the **Ctrl** key and select multiple contacts), and drag the contact(s) from the Contacts area and drop it onto the new location.

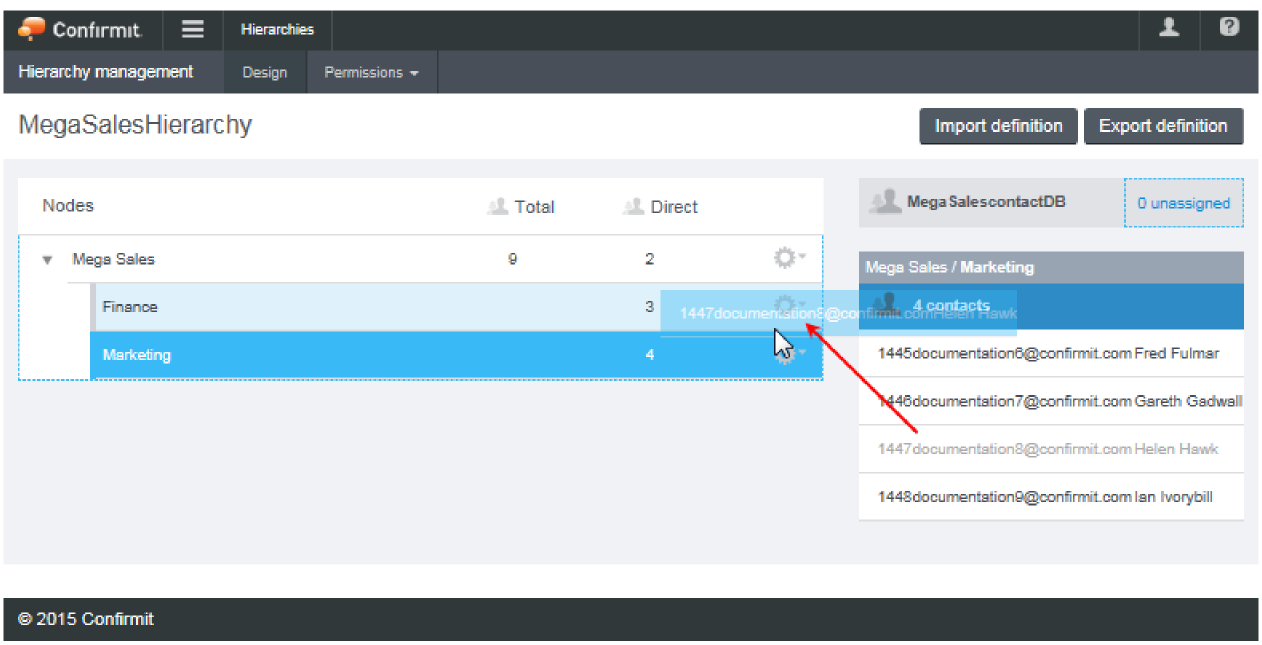


Figure 41 Relocating contact 1447 from Marketing to Finance by dragging and dropping

You are notified that the contact has been moved, and the counts are updated.

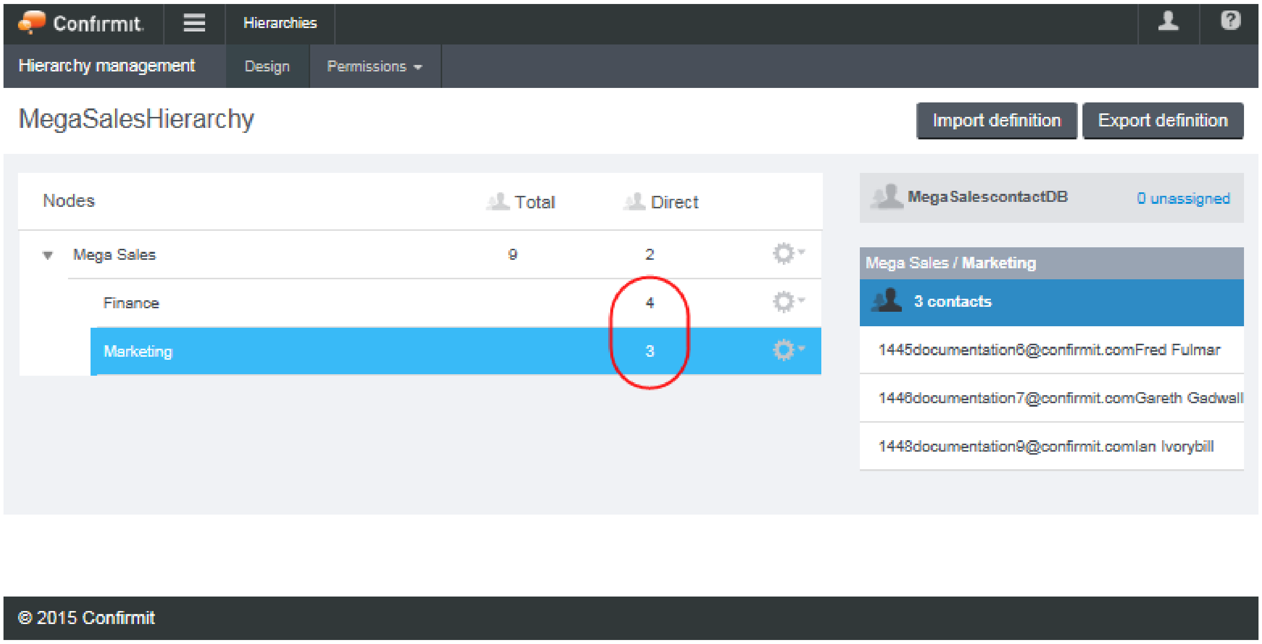


Figure 42 The contact is moved and the counts are updated

If you are unsure of where in the hierarchy a contact should be, you can drag the contact to the Unassigned field (just above the Contacts area). Someone else (who has been given Manage permission for the hierarchy (go to Hierarchy Permissions on page 8 for more information)) can then place the contact in the correct node.

4.8. Unassigned Contacts

If a contact in the hierarchy definition has no Node ID and Label, then the contact will be placed automatically into the Unassigned field on upload. Also, if you are unsure of where in the hierarchy a contact should be, you can drag the contact from a node's Contacts area to the Unassigned field. Someone else (who has been given Manage permission (go to Hierarchy Permissions on page 8 for more information)) can then place the contact in the correct node.

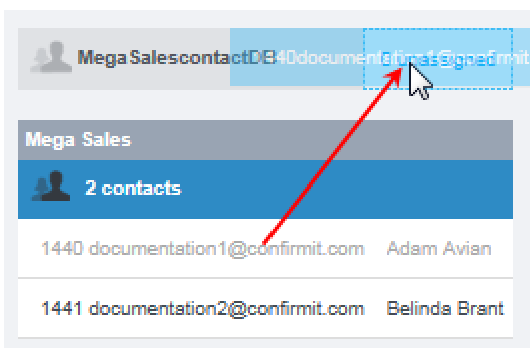


Figure 43 Dragging a contact to the Unassigned field

When you have contacts in the Unassigned field, you can click on the field to view the contacts, and drag those contacts to hierarchy nodes as required.

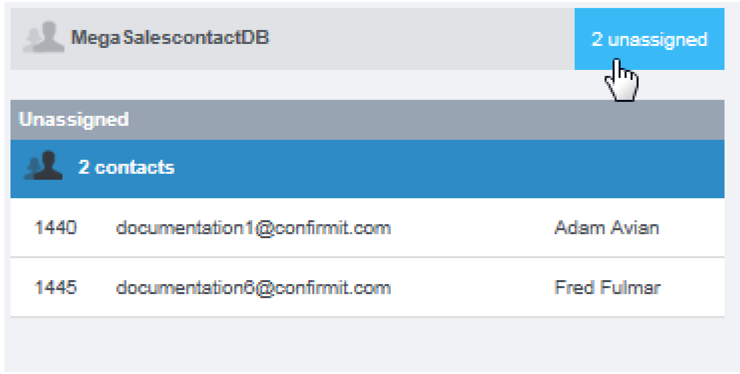


Figure 44 Contacts in the Unassigned field

4.9. Editing the Name and Email of Contacts

If the hierarchy is set up with variables for "name" and/or "email" for contacts, a user with "Manage" permission for the node the contact belongs to, or to the entire hierarchy, will be allowed to edit the name and/or email of contacts. To edit the details of a contact:

1. Click on the cog wheel on the right side of the contact and select **View & Edit contact**.

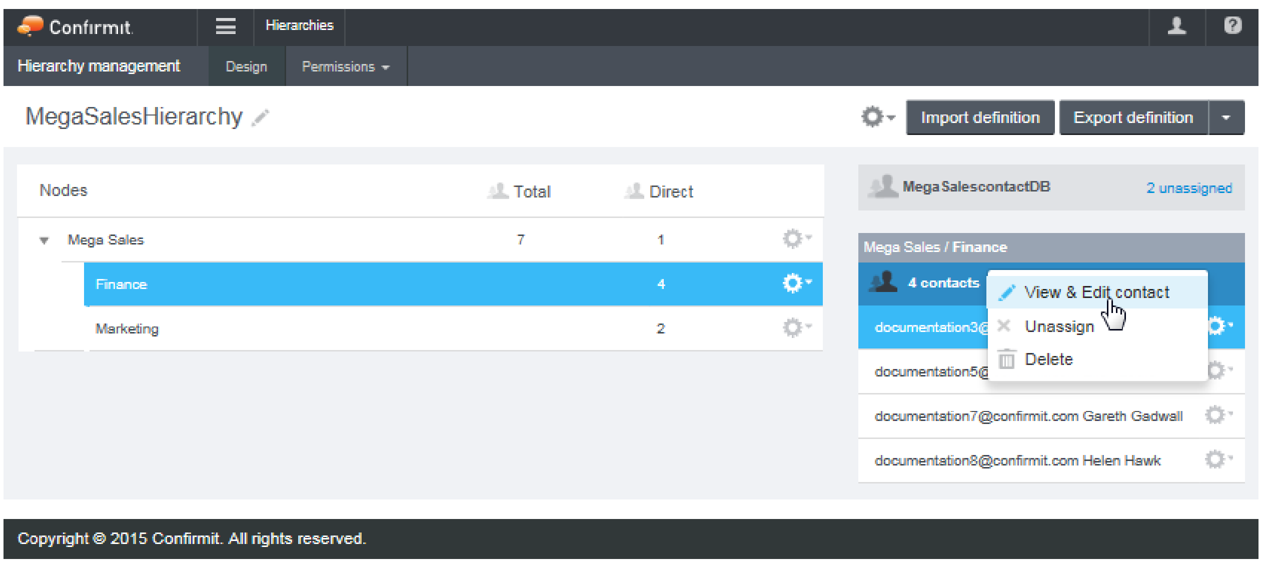


Figure 45 Selecting View & Edit Contacts

The View & Edit Contacts overlay opens.

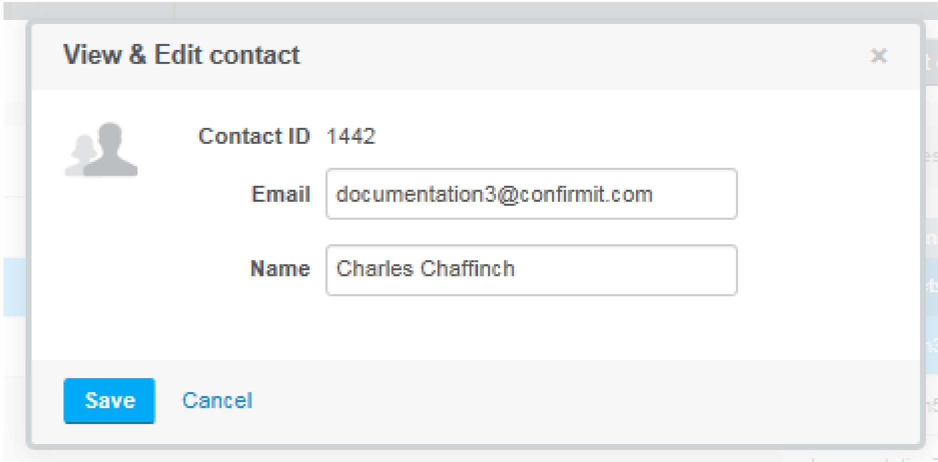


Figure 46 The View & Edit Contacts overlay

2. Make the necessary changes and click **Save** to return to the hierarchy page.

4.10. Deleting Contacts

To be allowed to delete a contact assigned to a node, you must have Manage permission for the node the contact belongs to, or to the entire hierarchy. To be allowed to delete a contact in "Unassigned", you must have Manage permission to the entire hierarchy.

Important
Deleting a contact will also remove any data associated with it, and this will affect any reports using this data.

To delete a contact:

1. Click on the cog wheel icon on the right side of the contact and select **Delete**.

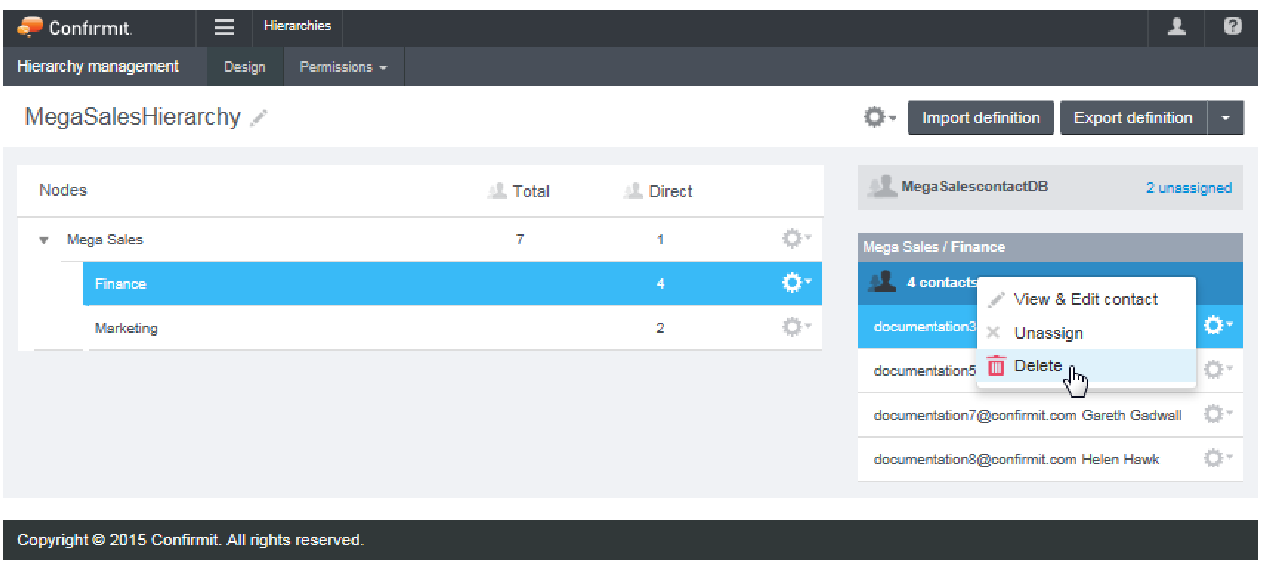


Figure 47 Deleting a contact

The Delete Contact overlay opens.

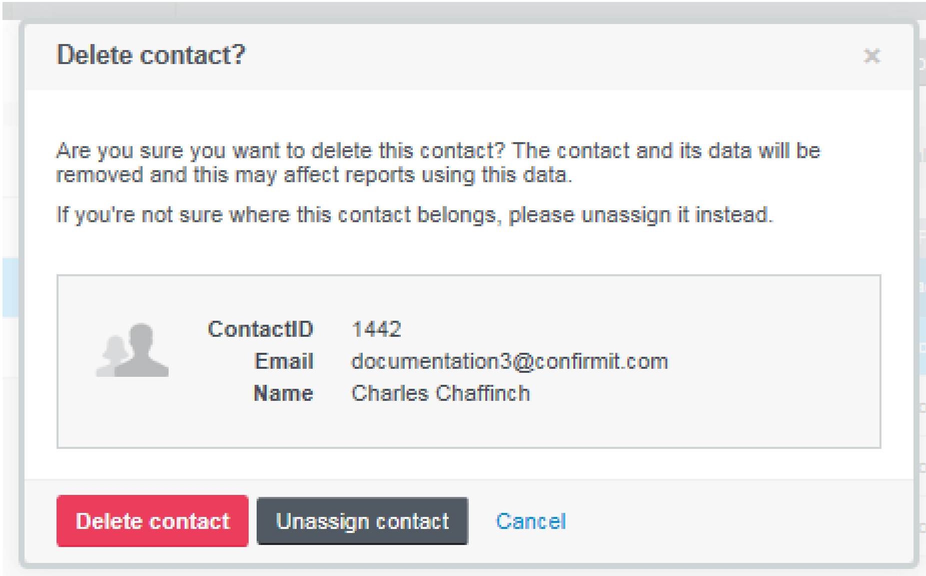


Figure 48 The Delete Contact overlay

Note that if you are not certain that the contact must be deleted, unassign it instead. The contact can then be reinstated later if necessary.

2. Click **Delete Contact**, **Unassign** or **Cancel** as appropriate.

4.11. The Audit Log

All operations on the hierarchy and contacts are logged in an audit log. As a user with access to the entire hierarchy, you can export this audit log to and Excel®[9] file.

In the hierarchy Design page, click on the cog wheel for the hierarchy and select **Export log**.

[9]The word Excel®, as used in the Confirmit GUI, is a registered trademark of the Microsoft Corporation.

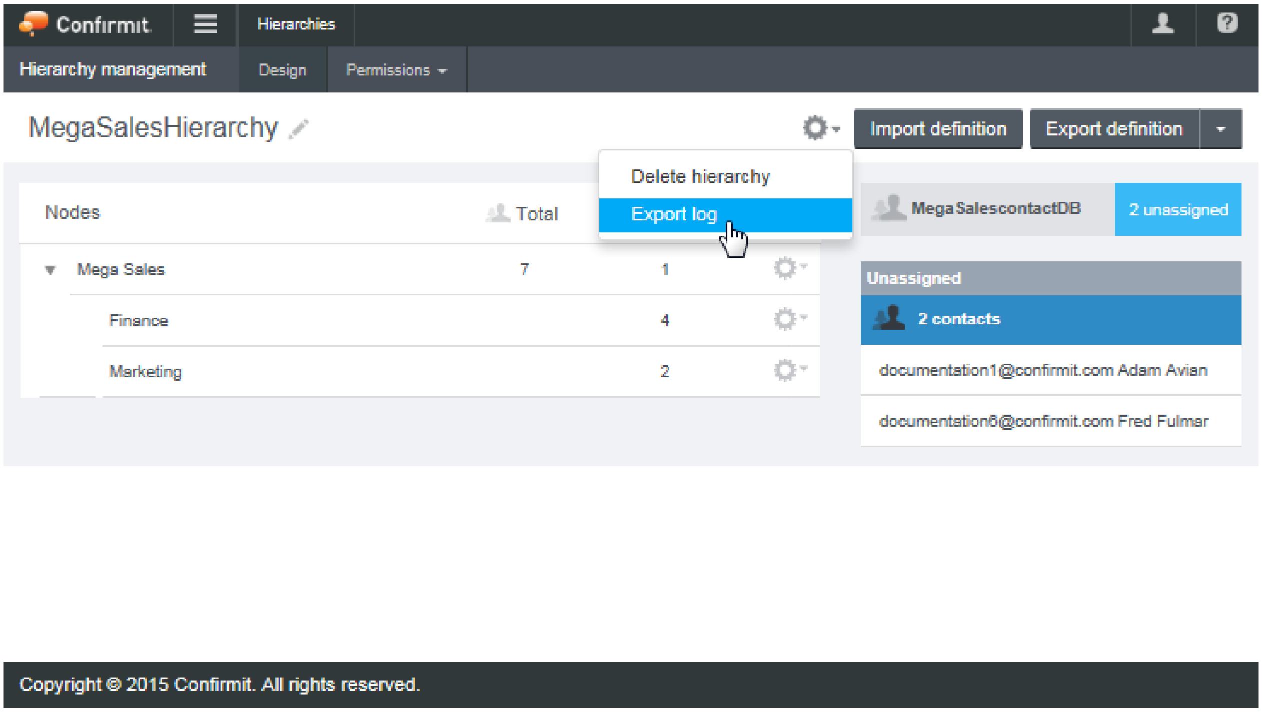


Figure 49 Exporting the audit log

An “Open or save...” message box opens across the bottom of the window; proceed as appropriate.

5. Uploading a Contact Database as a Respondent List

You can populate your respondent list with Contact Database data by exporting the data from your Contact Database and uploading the records as a respondent list to your survey in Survey Authoring. To do this:

1. Log into Survey Authoring and go to Contact Databases in the blue Quick Access panel on the left side of the screen.
2. Locate your contact database project in the list and click the project ID.

   The Contact Database Overview page opens.
3. In the menu bar across the top of the page, go to the **Contact Database Management > Exports** command.

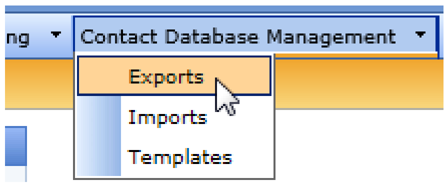


Figure 50 Accessing the Exports command

The Export page opens

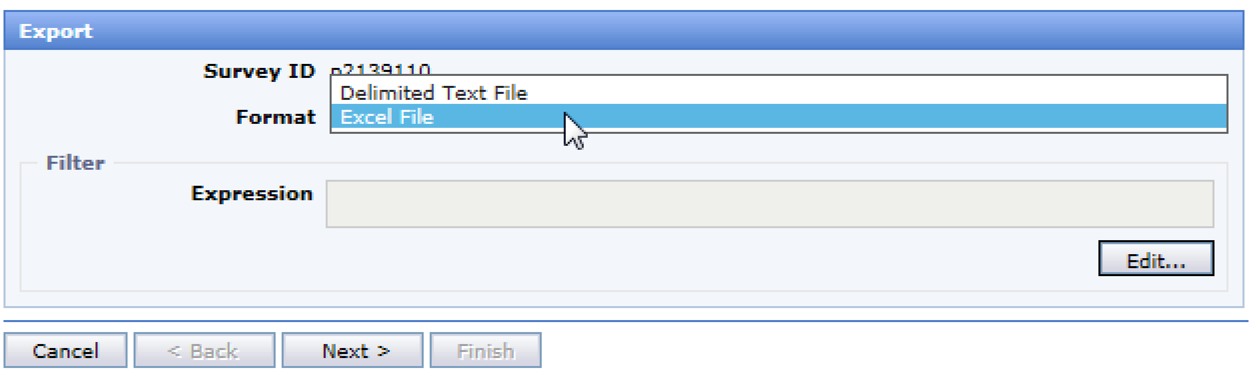


Figure 51 Selecting Excel® File

4. In the Format field select **Excel® File**, then click **Next >**.
5. In the new page, select the variables you wish to include in the exported spreadsheet.

   To do this, click the **Select variables…** button located under Contact Database Variables, then in the overlay, select the variables you wish to export then move them over to the Selected column using the double-headed arrow button. If you wish to export several variables, hold down the **Ctrl** key on your keyboard as you make your selection to move them as a group. Click **OK**. You will now see the chosen variables in the Contact Database Variables field, as shown below.

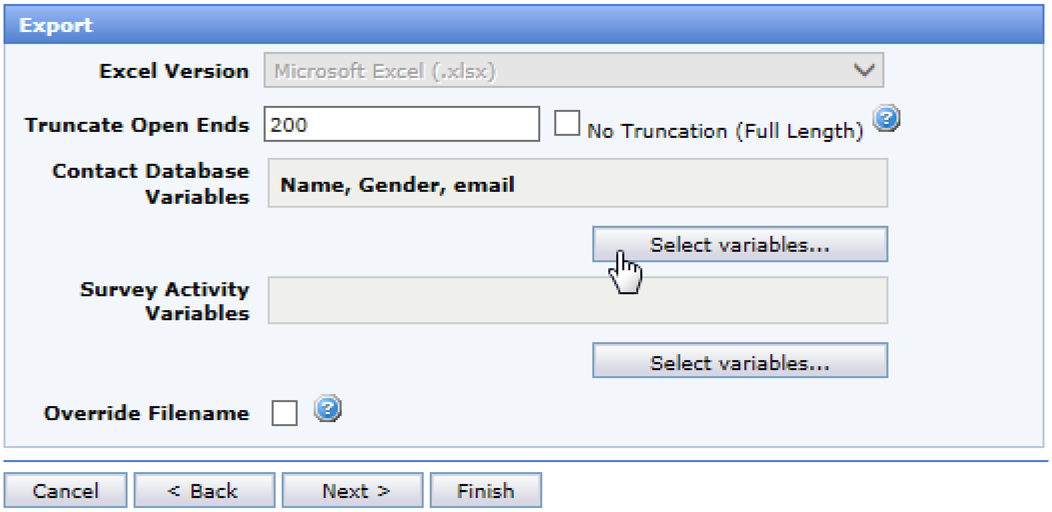


Figure 52 Selecting the variables to be exported

6. Click **Next >**.
7. On the final screen, click **Finish**.

   The export will be emailed to you. Note that you can send the export to someone else by changing the email address in the final screen.
8. When you receive your export, open the spreadsheet, delete the **responseid** column then save the file as tab-delimited text.
9. While still in Survey Authoring, access your survey and go to the **Respondents > Upload** menu command.
10. Click the **Choose File** button and browse to locate the tab-delimited text file on your computer.
11. Click **OK** to upload your respondent list.

6. Limitations and Restrictions

Although the hierarchy management module has few built-in limits, it has been tested to support hierarchies up to a certain size, and users should not go beyond those limits without first consulting with Confirmit.

The hierarchy management module supports hierarchies up to:

- 15 levels
- 50 000 nodes
- 500 000 contacts

Values for node ids must be unique across hierarchy, and can consist of alphanumeric characters (a..z, A..Z, 0..9) and underscores (_) only. Node ids are case insensitive and will be stored as lower case. The maximum length of a node id is 50 characters.

Values for labels can include any type of letters (including Unicode), digits, white spaces (tabs, space etc.) and any of these characters: .(){}[]%\/@&+-:'^. The maximum length of a node label is 2048 characters.

Index