



Confirmit Hierarchy Management End User Guide

This is document revision 3 of the Confirmit Horizons v23 Hierarchy Management End User Guide. The information herein describes Confirmit Horizons Hierarchy Management and its features as applicable to End Users, as of Build nr. 23.0.780 (given in the Authoring **Home > Help > About** menu), published in August 2018. 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.

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The companies, names and data used or described in the examples herein are fictitious.

Table of Contents

Table of Contents **3**

What's New in this Revision? **4**

1. Introduction..... **1**

 1.1. Logging In as an End User 1

 1.2. The Hierarchies List..... 2

2. Editing the Hierarchy..... **6**

 2.1. The Node Edit Menu..... 6

 2.1.1. Viewing and Editing Node Details 6

 2.1.2. How to Delete a Node..... 7

 2.1.3. How to Add a Child Node 7

 2.1.4. Cutting and Pasting Nodes 8

 2.2. Moving Contacts Between Nodes..... 8

 2.3. Unassigned Contacts..... 10

 2.4. Editing Contacts..... 10

 2.5. Deleting Contacts 12

 2.6. End User Node Assignments..... 14

 2.7. The Audit Log 14

Index **16**

What's New in this Revision?

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document, which can be downloaded from the Confirmit Extranet at <https://extranet.confirmit.com>.

The following changes have been made in revision 3 of the Confirmit Horizons v23Hierarchy Management End User Guide:

- A note is added to the Viewing and Editing Node Details section (go to Viewing and Editing Node Details on page 6 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.

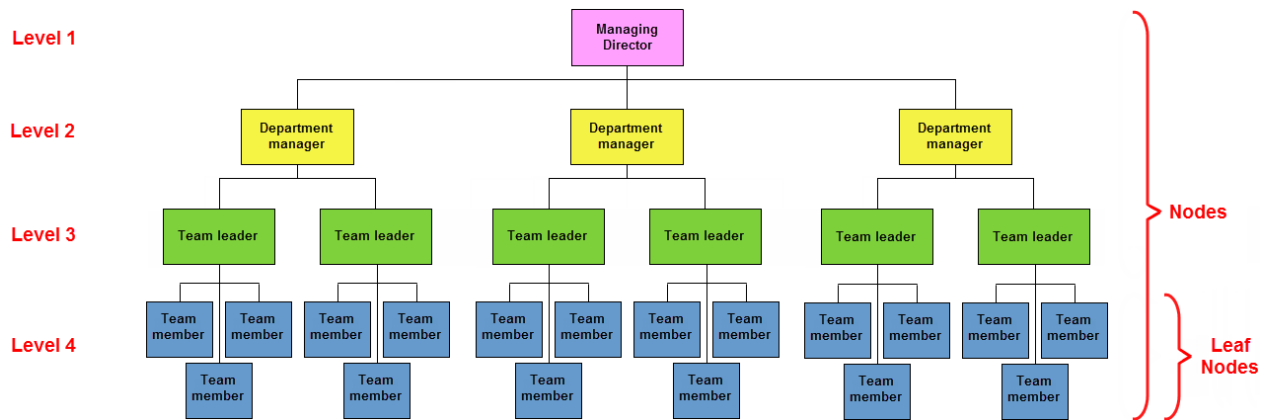


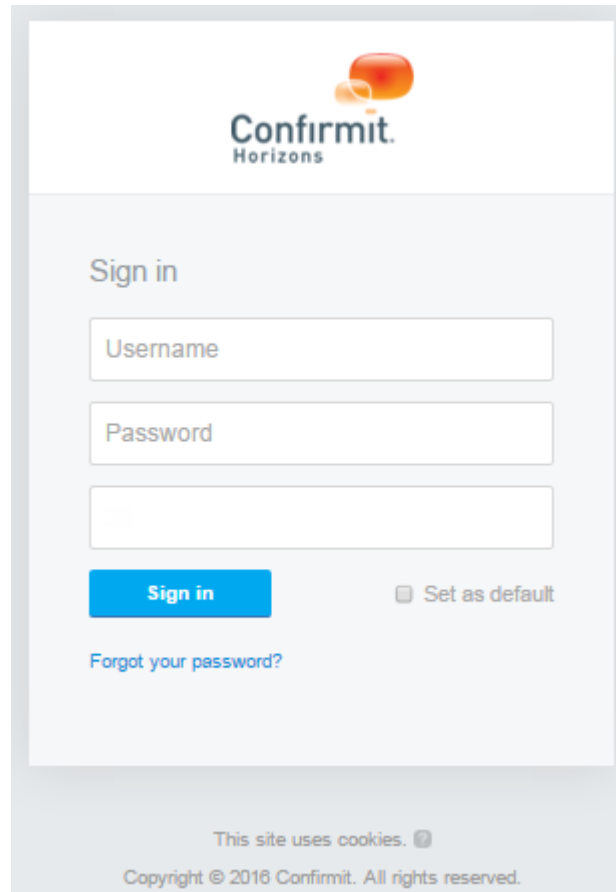
Figure 1 Hierarchy example

1.1. Logging In as an End User

To log in as an end-user:

1. In your Internet browser, go to the Confirmit End User login page.

`https://author.<confirmitserver>/hierarchymanagement`



Confirmit
Horizons

Sign in

Username

Password

Set as default

[Sign in](#)

[Forgot your password?](#)

This site uses cookies. ⓘ

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Figure 2 *The Confirmit End User login page*

2. Enter your end user login name, your password and the portal ID, then click **Sign in**.

The Hierarchies page opens. This page lists all the hierarchies to which you have been given access (go to The Hierarchies List on page 2 for more information).

1.2. The Hierarchies List

When you log in as an end user, the Hierarchies page opens. This page lists all the hierarchies to which you have been given access.

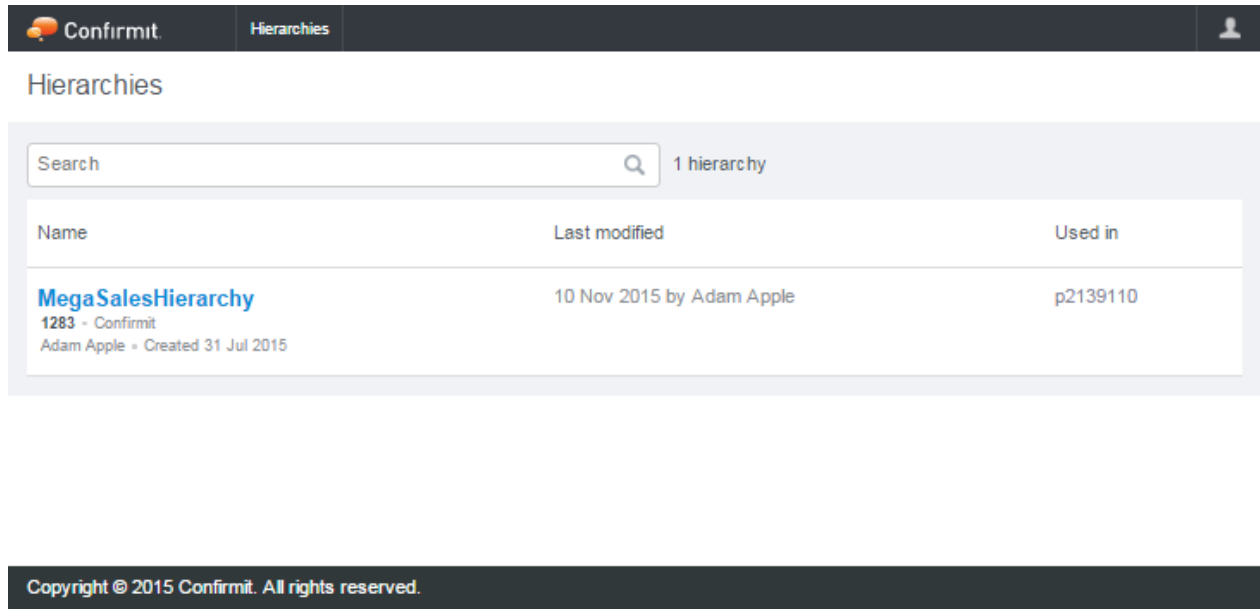


Figure 3 Example of the Hierarchies page for an end user

The total number of hierarchies available to you is given beside the Search field. 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 and by whom. In addition, launched surveys and contact databases that use that hierarchy are given in the Used In column.

In the event your list of hierarchies is extensive, you can search for the desired hierarchy. Type characters into the Search box; the list is immediately filtered such that only those hierarchies containing the character string you have typed are listed. The search facility will look through the hierarchy names, the users' first names, last names and user ID using the "contains" operator, that is the hierarchy will be included in the list if any of its parameters contain the character string anywhere within it. You can also search for the hierarchy ID, but in this case only a full match will be found (a search for 123 will only return hierarchy 123, not hierarchy 1234 etc.).

1. Click on the blue link for the hierarchy you wish to view.
The hierarchy opens.

The screenshot shows the Confirmit interface for hierarchy management. At the top, there's a navigation bar with 'Confirmit' logo, 'Hierarchies', and a user profile icon. Below that, 'Hierarchy management' and 'Design' are visible. The main content area is titled 'MegaSalesHierarchy'. It features a table of nodes and a sidebar for unassigned contacts.

Nodes	Total	Direct	
▼ Mega Sales	7	1	👁️
Finance		4	👁️
Marketing		2	⚙️

On the right sidebar, there's a section for 'MegaSalescontactDB' with '2 unassigned' contacts. Below this, an 'Unassigned' section shows '2 contacts':

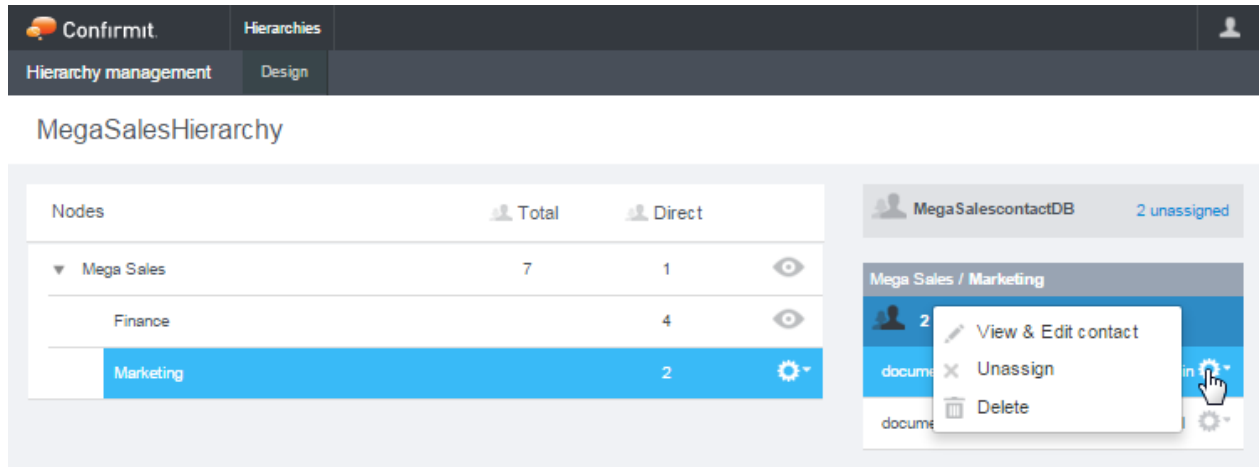
Unassigned	
documentation1@confirmit.com	Adam Avian
documentation8@confirmit.com	Fred Fulmar

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Figure 4 Example of a hierarchy opened by an end user with limited node access

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, and if the hierarchy has been set up with contacts, delete and edit the contacts and move them between nodes.

In the above example the end user can view the full hierarchy and the contacts in the Finance node, and has edit permission for the Marketing node. With this access the user can see and edit the contacts in the Marketing node and any unassigned contacts (the contacts have the cog wheel icon which opens the **Edit** menu) (go to Editing the Hierarchy on page 6 for more information).



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Figure 5 Editing the contacts in the node

2. Editing the Hierarchy

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.

2.1. 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.

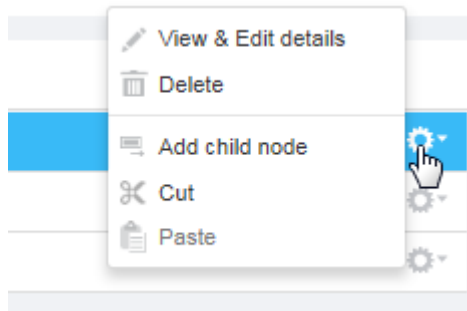


Figure 6 The Edit menu for a node

- **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 6 for more information).
- **Delete** - delete the node and any child nodes it may contain (go to How to Delete a Node on page 7 for more information).
- **Add child node** - add a child node to the current node (go to How to Add a Child Node on page 7 for more information).
- **Cut/paste** - move child nodes from one higher-level node to another (go to Cutting and Pasting Nodes on page 8 for more information).

2.1.1. 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**.

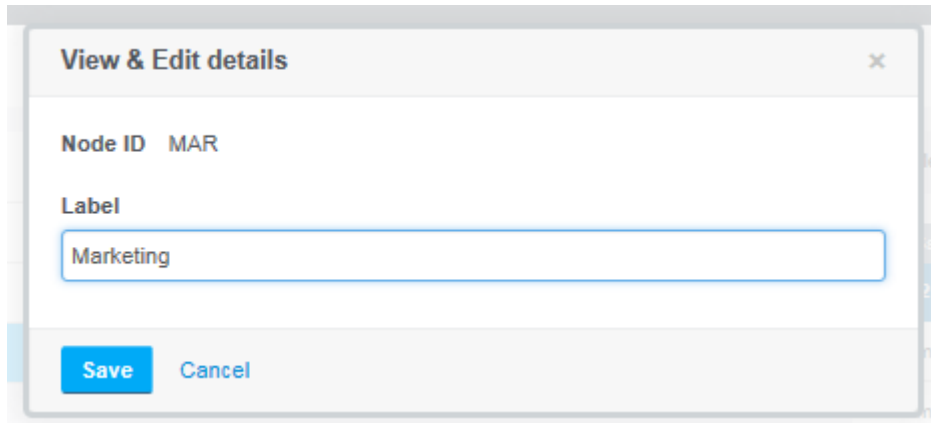


Figure 7 Example of a Node Details overlay

Note: If the end user has been allocated the possibility to edit node attributes (refer to the separate Hierarchy Management User Guide for further details), then this overlay will contain additional editable fields. The number and details of the additional fields will depend on the hierarchy setup.

2.1.2. 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.

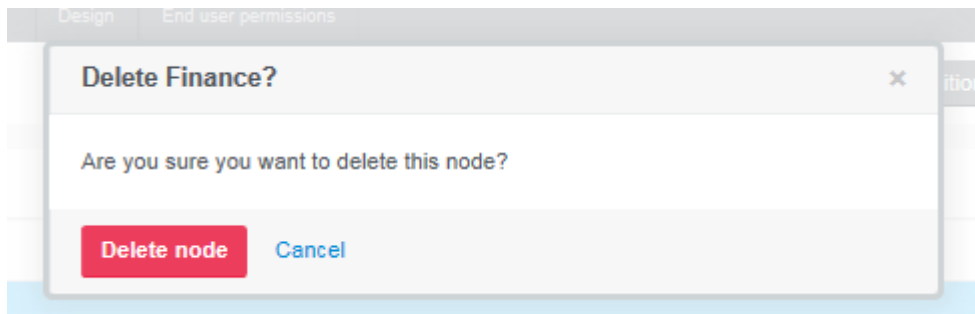


Figure 8 The confirmation overlay

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 8 for more information) or delete (go to Deleting Contacts on page 12 for more information) all contacts assigned to the node or any of its child nodes.

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

2.1.3. 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.

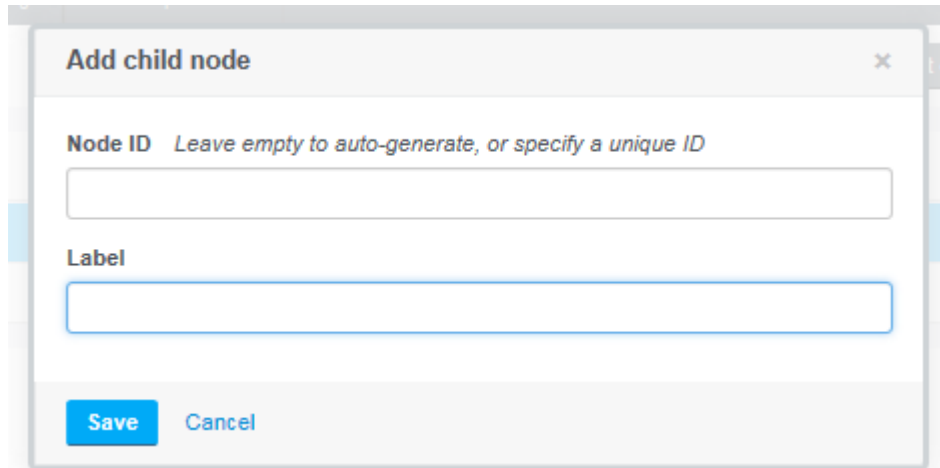


Figure 9 The Add child node overlay

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

2.1.4. 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.

2.2. Moving Contacts Between Nodes

If you have contacts assigned to your hierarchy, you can easily move them between any nodes to which you have manage permission 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.

- 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 required node.

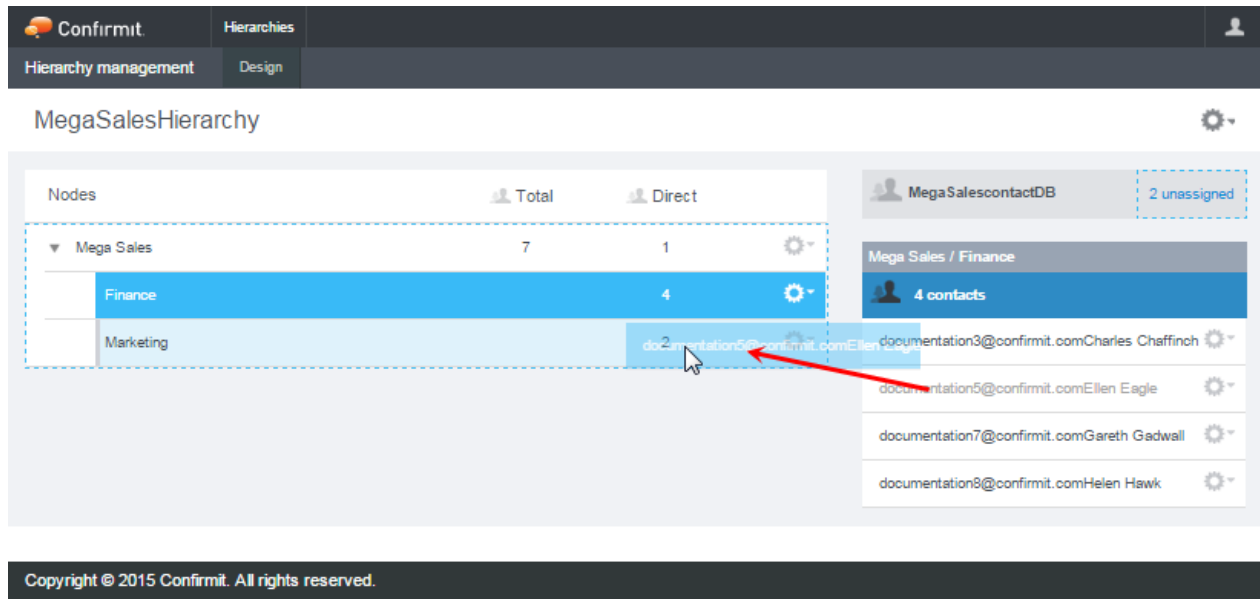


Figure 10 Moving a contact from Finance to Marketing by dragging and dropping

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

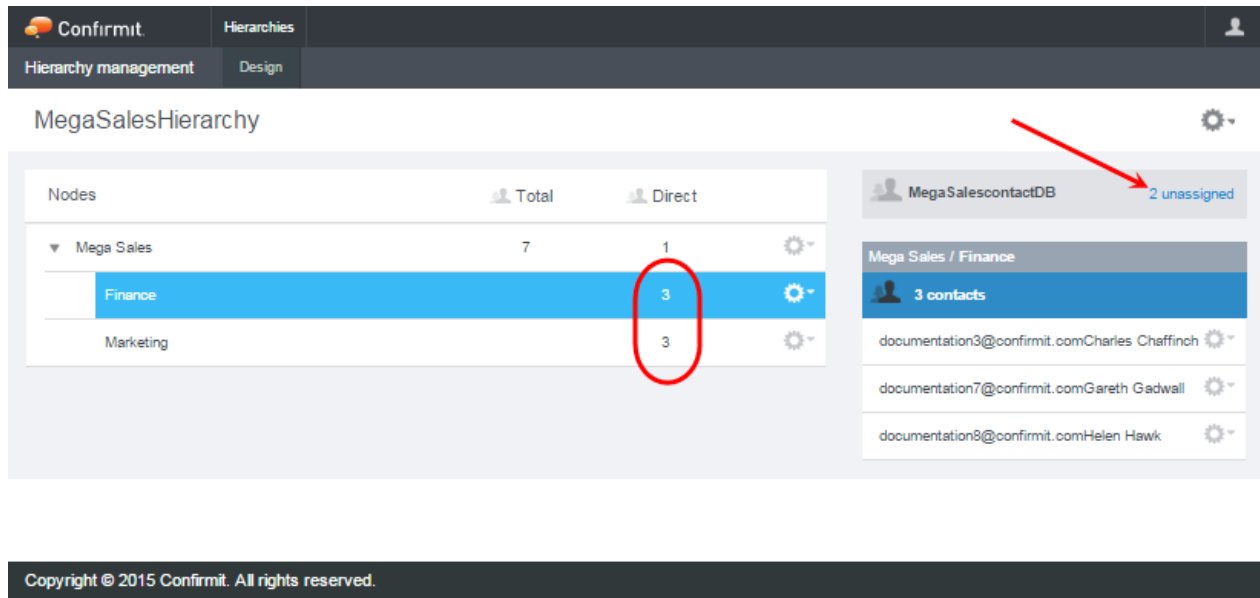


Figure 11 The contact is moved and the counts are updated

If you are unsure of where in the hierarchy a contact should be, you can drag the contact to the Unassigned field (arrowed, just above the Contacts area). Someone else who has Manage permission for the hierarchy can then place the contact in the correct node.

2.3. 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 have Manage permission for a node and you are unsure of where in the hierarchy a contact should be, you can move the contact from the node's Contacts area to the Unassigned field. To do this, either drag the contact into the Unassigned field or click on the contact's cog wheel icon and select **Unassign**. Someone else can then place the contact into a node for which they have Manage permission.

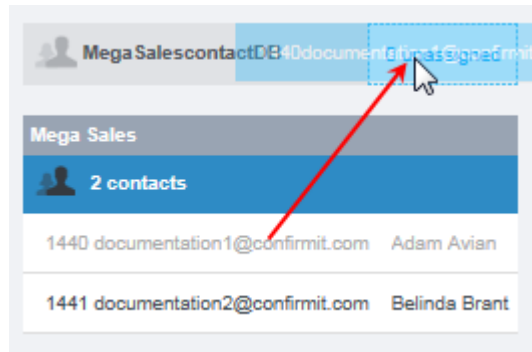


Figure 12 Dragging a contact to the Unassigned field

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 for which you have Manage permission.

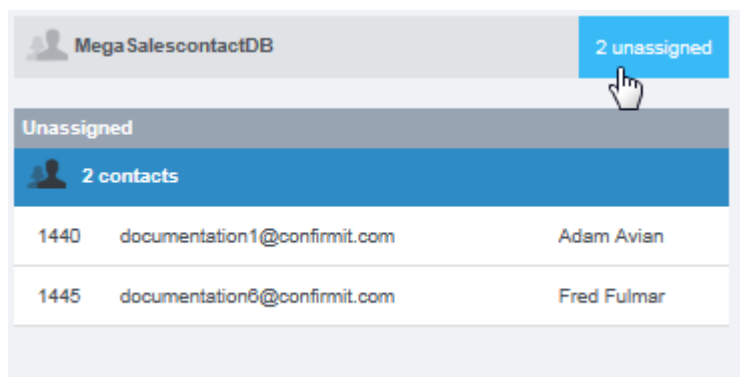
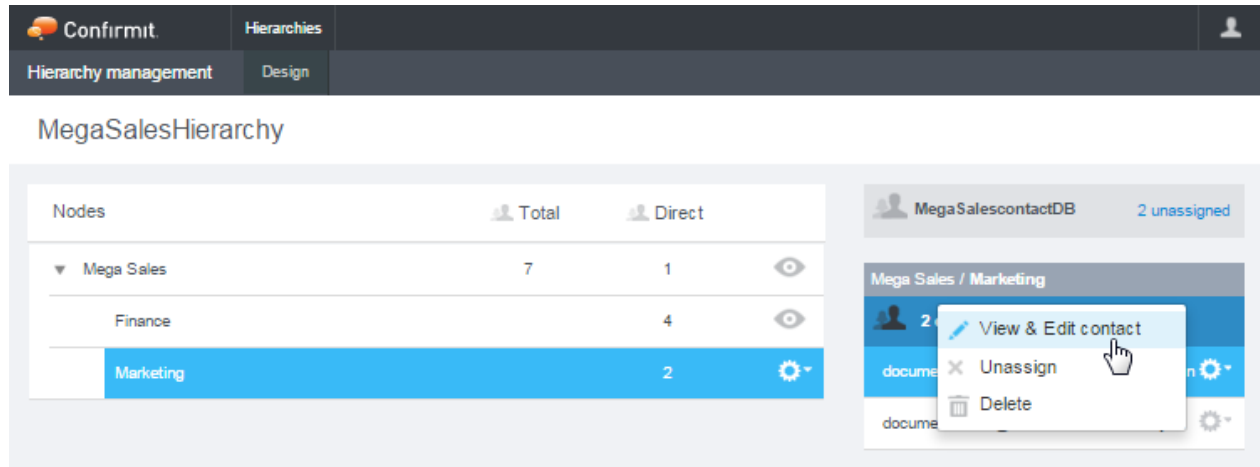


Figure 13 Contacts in the Unassigned field

2.4. Editing 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**.



<https://author.testlab.firmglobal.net/hierarchymanagement/1283/design#>

Figure 14 Selecting View & Edit Contacts

The View & Edit Contacts overlay opens.

View & Edit contact

Contact ID 34385

Email documentation3@confirmit.com

Name Charles Chaffinch

Gender Male

Job Title Product Engineer

Date of birth 17/01/1975

Date started 01/06/2006

Tenure 12

Full Time Equivalent 3.4

Save Cancel

Figure 15 The View & Edit Contacts overlay

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

2.5. Deleting Contacts

Depending on the settings for the hierarchy, you may have been set up with permission to delete contacts' data

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**.

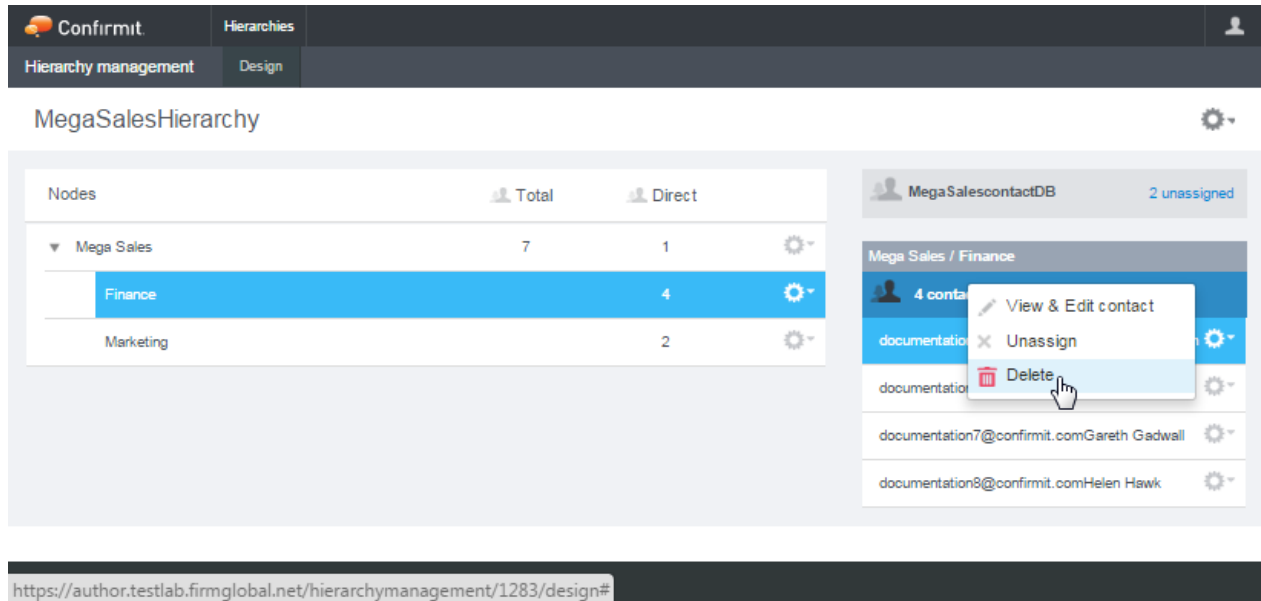


Figure 16 Deleting a contact

The Delete Contact overlay opens.

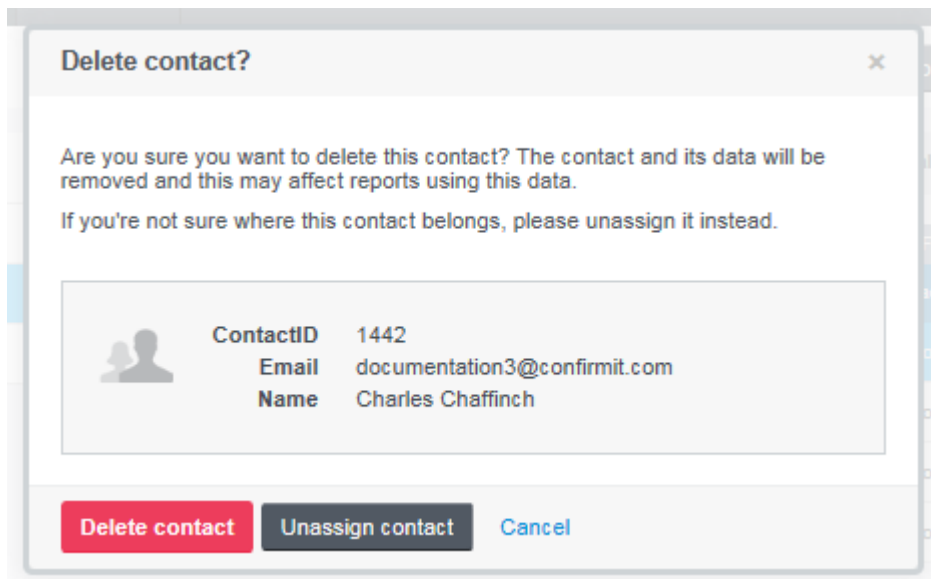


Figure 17 The Delete Contact overlay

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.

2.6. End User Node Assignments

A Hierarchy may be set up with the ability to set End User Node Assignments, These can for example be used to control what a user has access to in reports (“role-based reporting”). If this is enabled, and you have a user with Manage access to the entire hierarchy, End Users will appear on the right side of the hierarchy. For a hierarchy with contacts, this will be a separate tab next to the Contacts tab.

To associate an end user with a particular node:

1. Select the node in the hierarchy.
2. Click the + icon on the right side under End Users.
3. Select one or more end users and click **Add users**.

To remove an end user assignment from a node:

1. Select the node in the hierarchy
2. Click the X icon on the right side of the end user’s name.
3. Click **Remove end user assignment** to confirm.

Assignments between end users and hierarchy nodes are "many-to-many": An end user may be assigned to multiple nodes (for example a manager may be responsible for multiple units), and a hierarchy node may have several end users assigned (several business users would be able to see results related to a particular node).

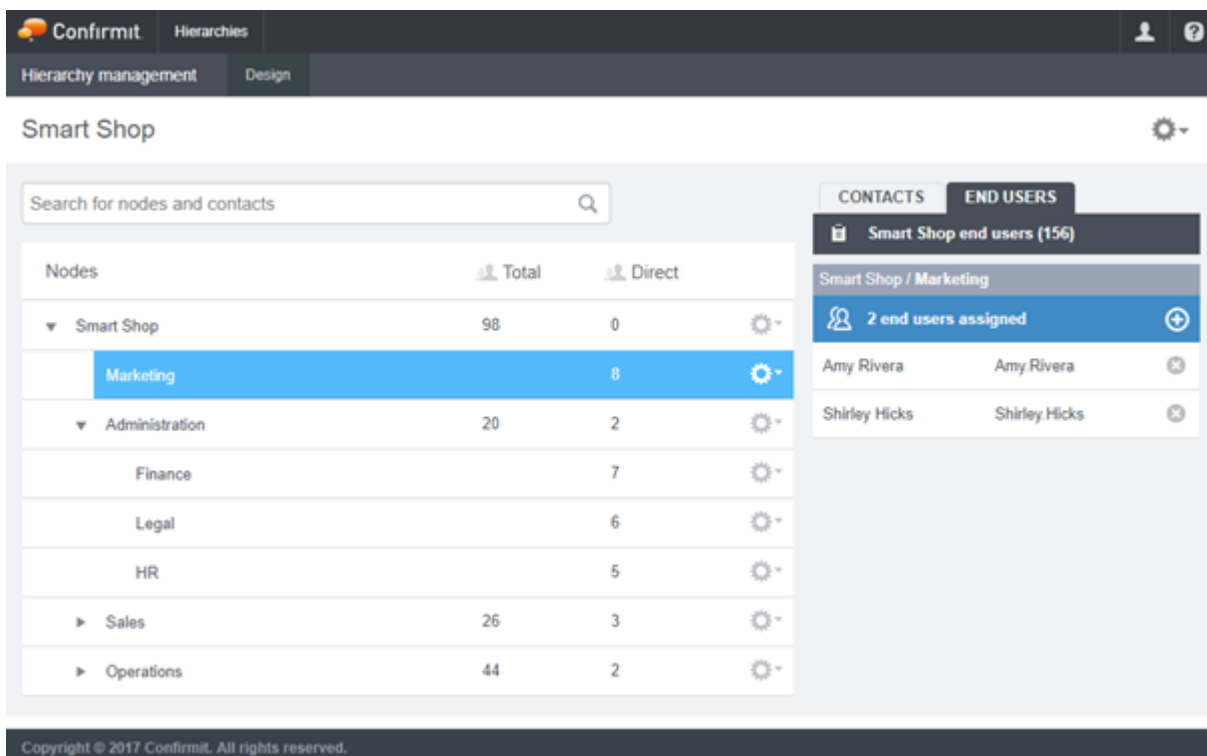
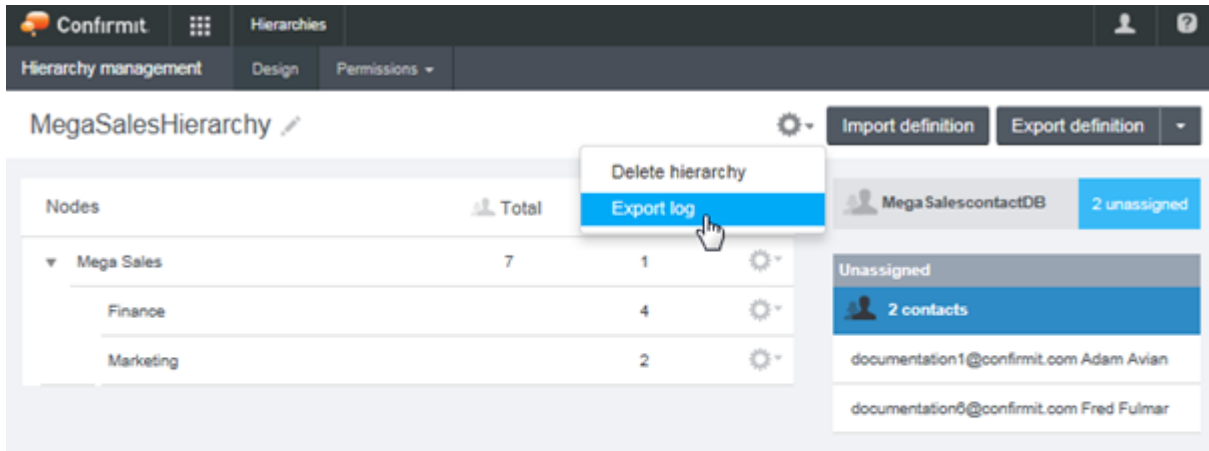


Figure 18 Setting End User Node Assignments

2.7. 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 an Excel™ file.

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



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Figure 19 Exporting the audit log

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

Index

	A		I
Add a Child Node, 7		Introduction, 1	
Add child node, 6, 7			L
Audit Log, 14		Logging In as an End User, 1	
	C		M
Child Node		Moving Contacts Between Nodes, 8	
Adding, 7			N
Cut, 8		Node	
Cut/paste, 6		Add, 7	
Cutting and Pasting Nodes, 8		Delete, 7	
	D	Node Details, 6	
Delete, 6		Node Edit Menu, 6	
Delete a Node, 7			P
Deleting Contacts, 12		Paste, 8	
	E		T
Edit Node Menu, 6		The Audit Log, 14	
Editing Contacts, 10		The Hierarchies List, 2	
Editing Node Details, 6			U
Editing the Hierarchy, 6		Unassigned Contacts, 10	
End User Node Assignments, 14			V
	H	View and Edit details, 6	
Hierarchy		Viewing and Editing Node Details, 6	
Editing, 6			W
How to		What's New in this Revision, 4	
Add a Child Node, 7			
Delete a Node, 7			