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Confirmit Hierarchy Management End User Guide

This is document revision 1 of the Confirmit Horizons v19 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. 19.1.1726 (given in the Authoring **Home > Help > About** menu), published in February 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.

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

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What's New in this Revision?

This is the first revision of this user guide.

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.

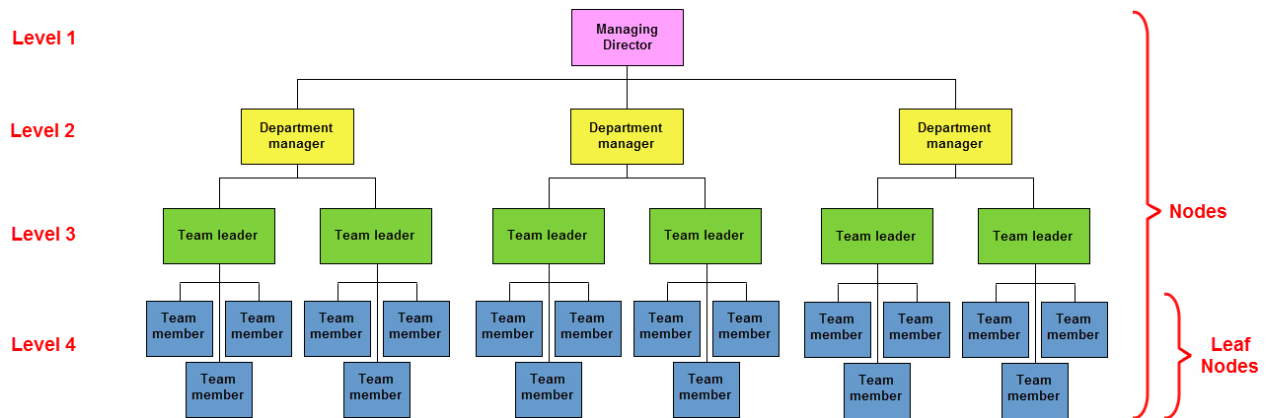


Figure 1 Hierarchy example

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.

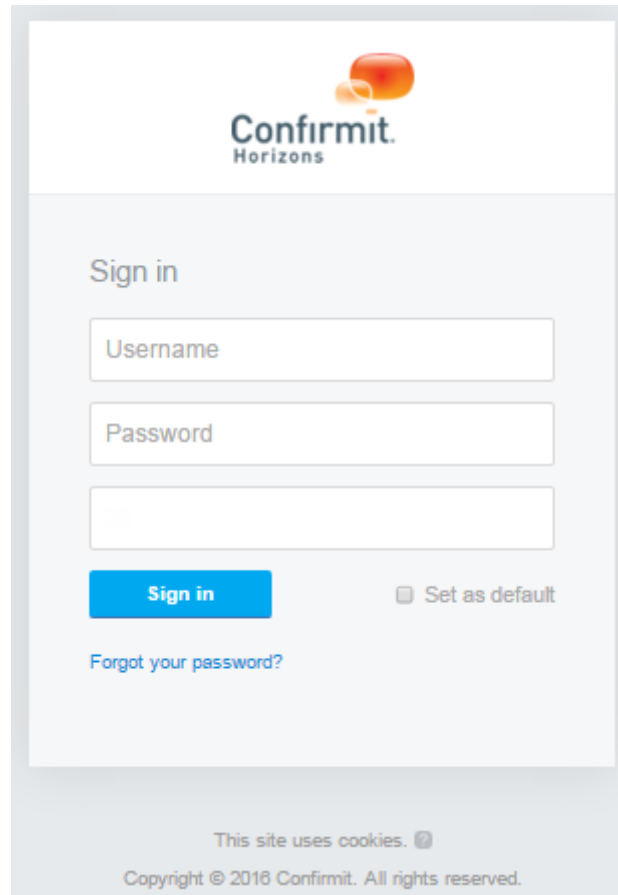


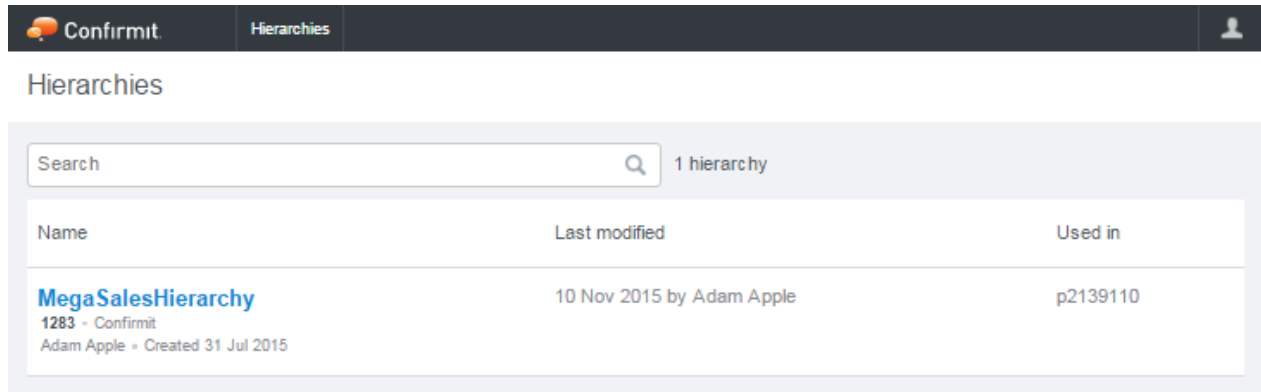
Figure 2 *The Confirmit End User login page*

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.

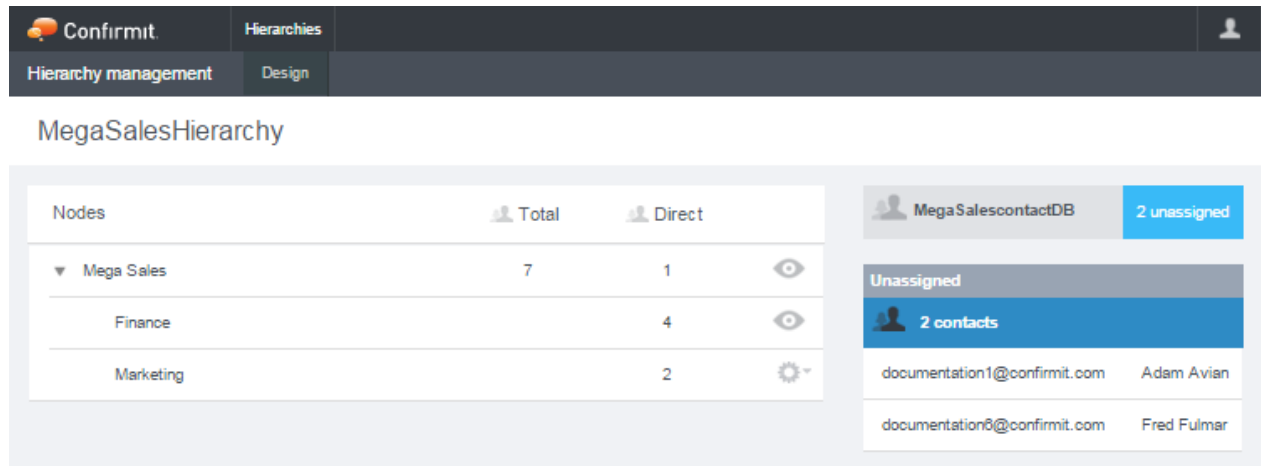


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Figure 3 Example of the Hierarchies page for an end user

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.

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



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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 5 for more information).

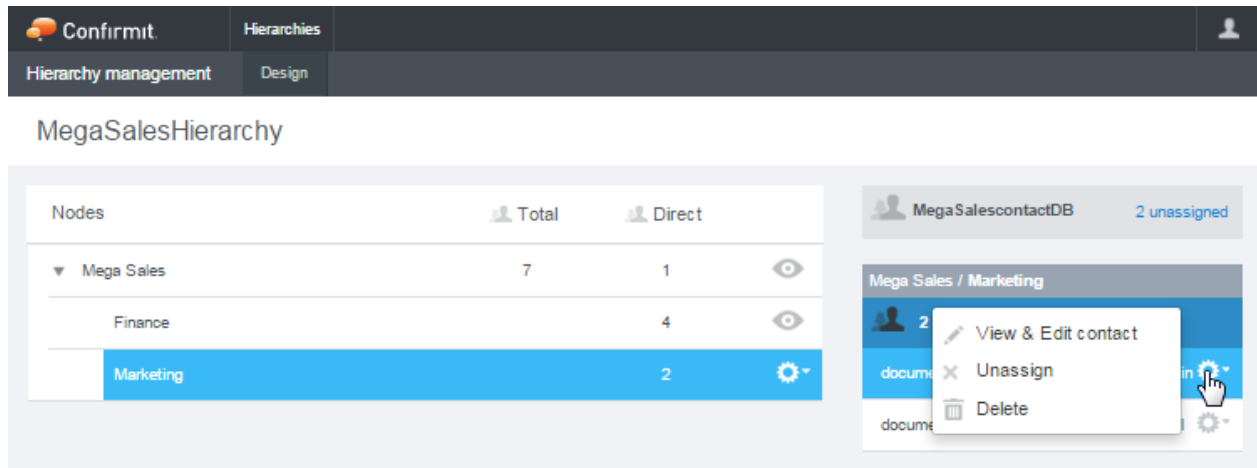


Figure 5 Editing the contacts in the node

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.

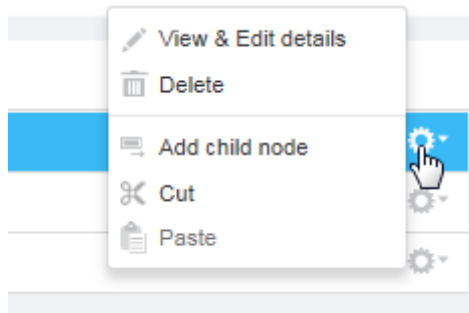


Figure 6 The Edit menu for a node

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

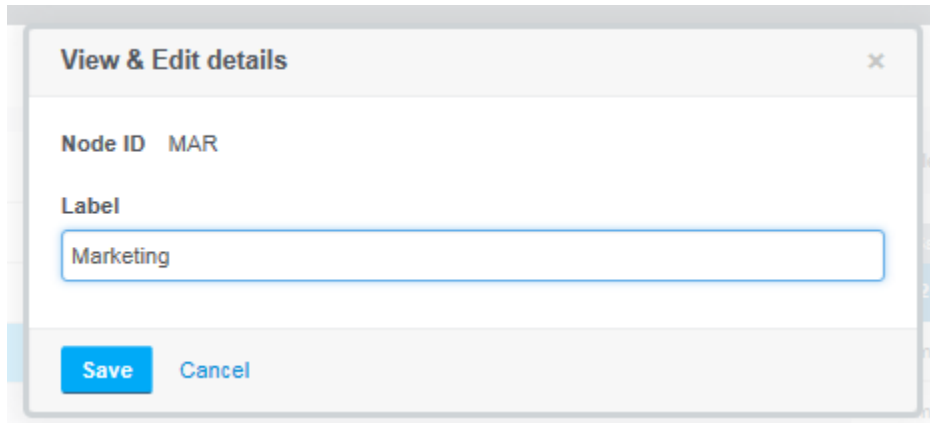


Figure 7 Example of a Node Details overlay

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.

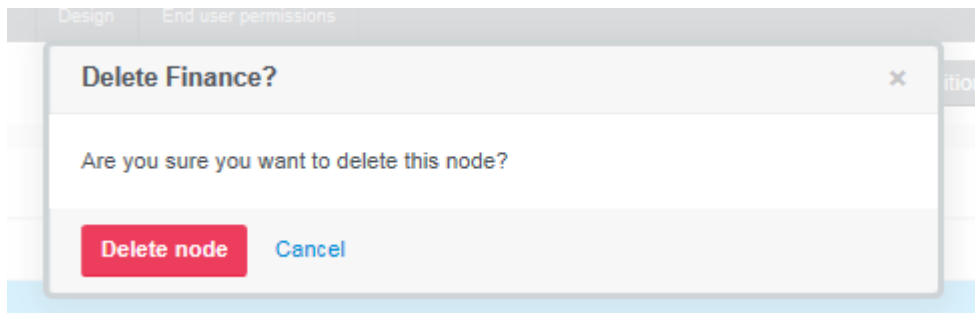


Figure 8 The confirmation overlay

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 7 for more information) or delete (go to Deleting Contacts on page 10 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.

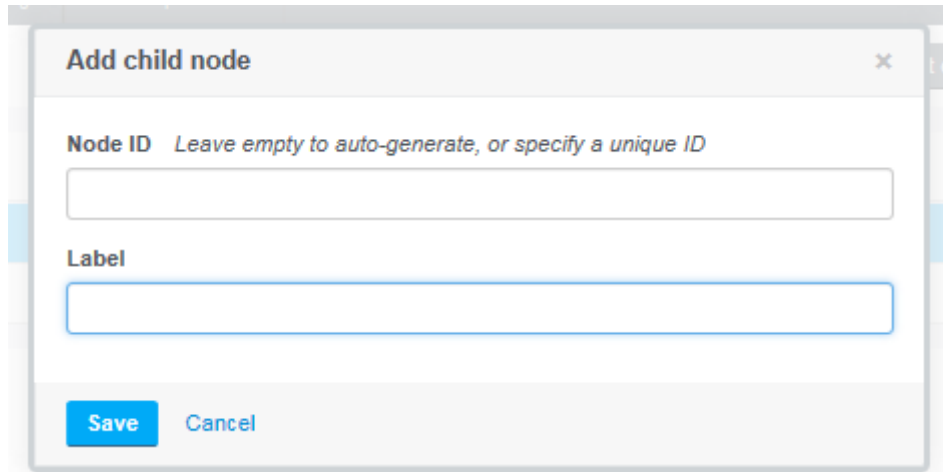


Figure 9 The Add child node overlay

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.

3. 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.

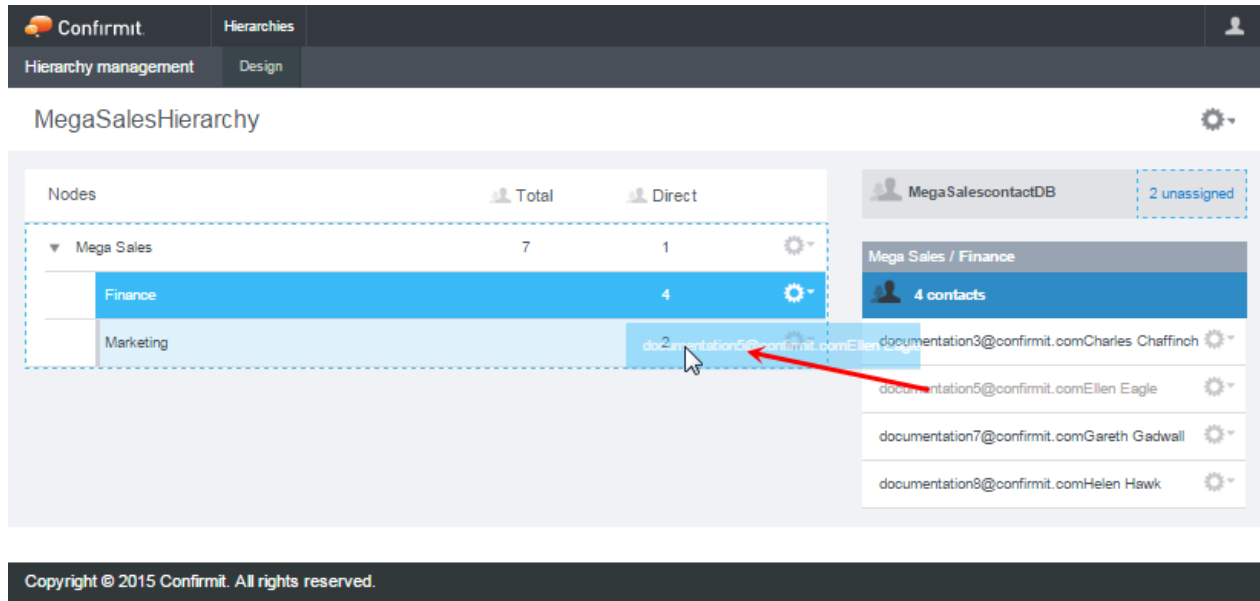


Figure 10 Moving a contact from Finance to Marketing by dragging and dropping

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

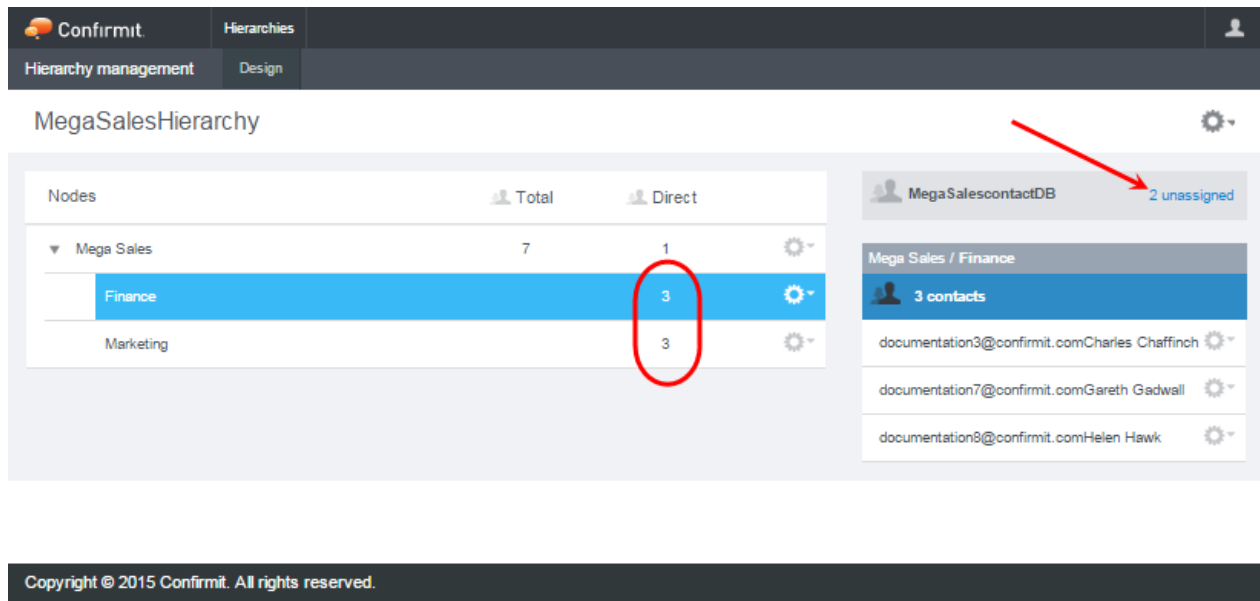


Figure 11 The contact is moved and the counts are updated

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.

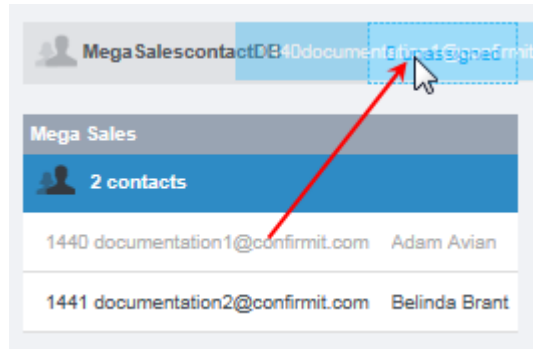


Figure 12 Dragging a contact to the Unassigned field

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.

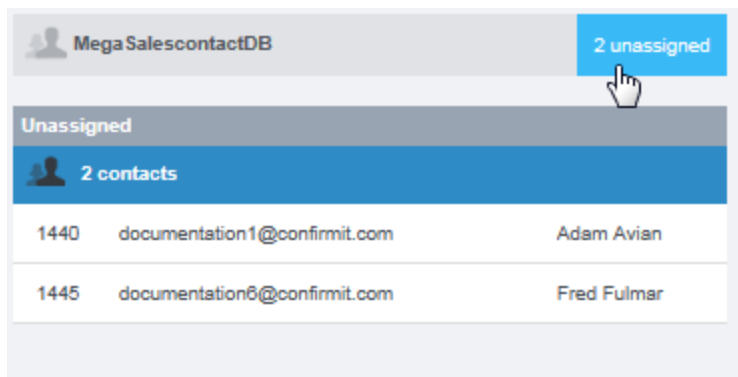
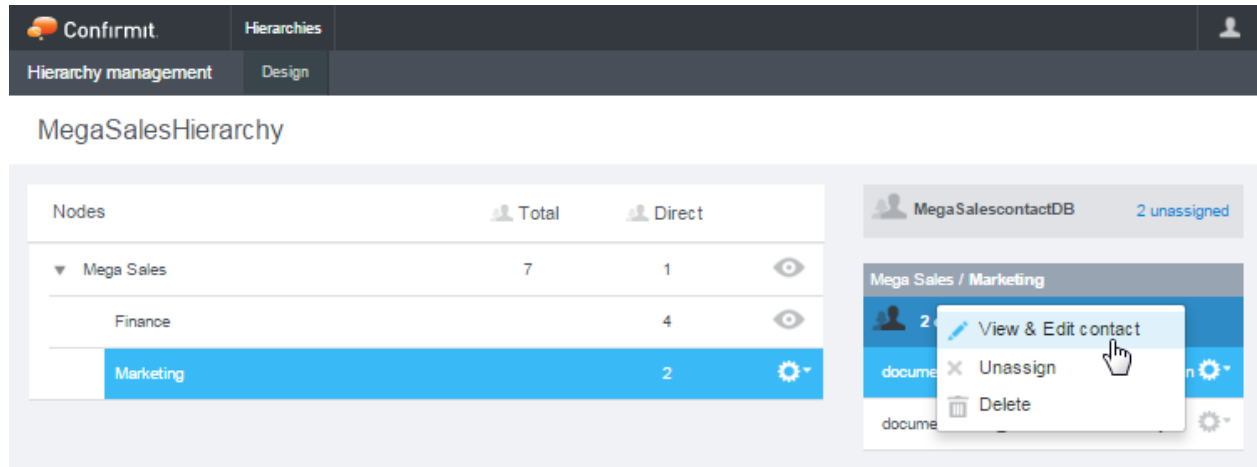


Figure 13 Contacts in the Unassigned field

2.4. Editing 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**.



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

Figure 14 Selecting View & Edit Contacts

The View & Edit Contacts overlay opens.

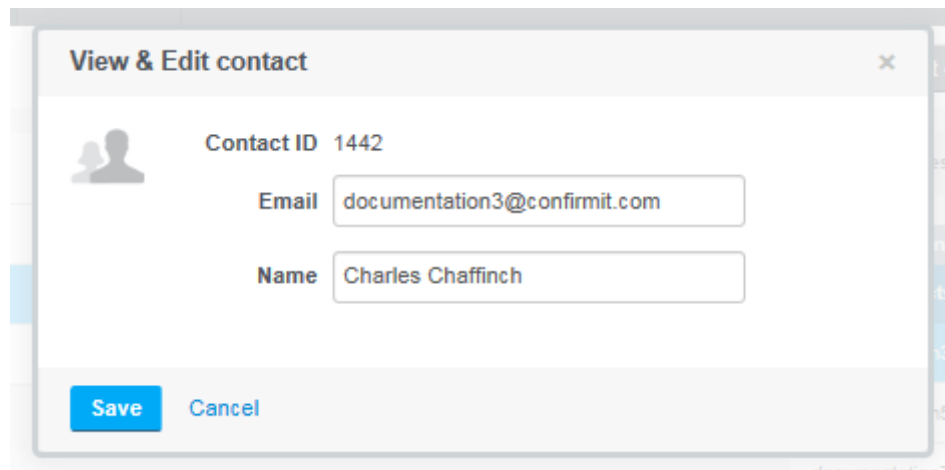


Figure 15 The View & Edit Contacts overlay

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

2.5. Deleting Contacts

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**.

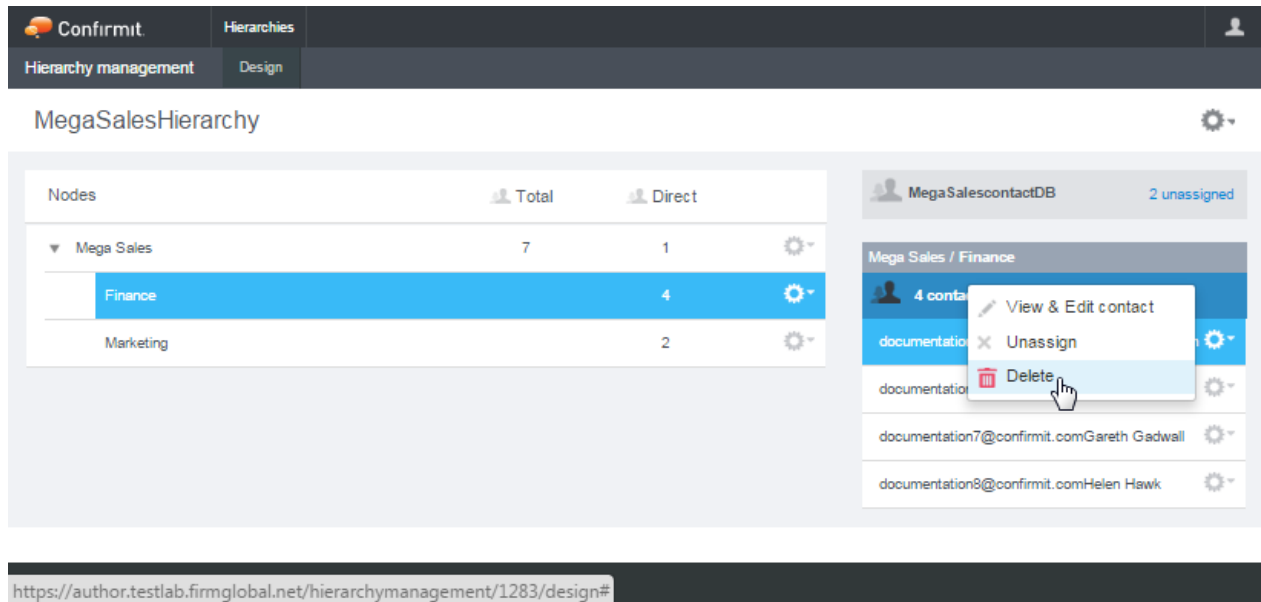


Figure 16 Deleting a contact

The Delete Contact overlay opens.

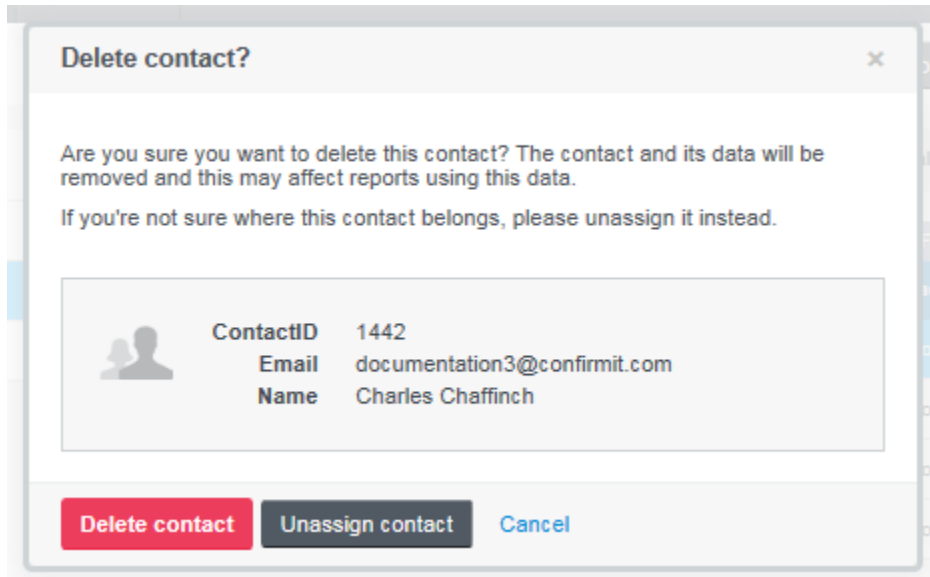


Figure 17 The Delete Contact overlay

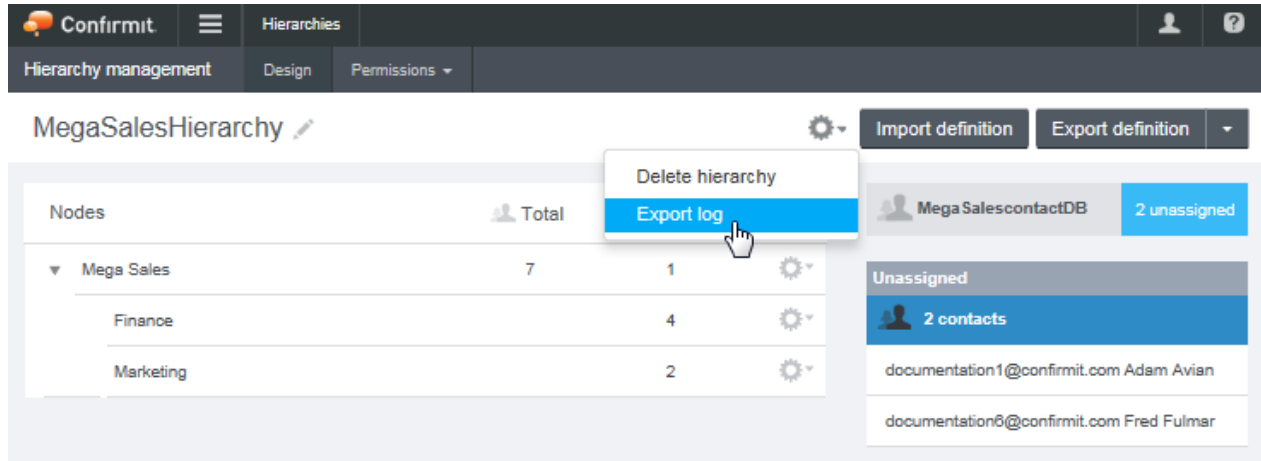
Note that if you are not certain that the contact must be deleted, unassign it instead. The contact can then be reinstated later if necessary.

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

2.6. 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 18 Exporting the audit log

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

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