
Chapter 2: Managing Your Organization Structure

The organization structure of your instance of SSR Mumbleware/SSR Frabbusware is a hierarchy of levels. This chapter explains how this hierarchy works and how you update it to reflect changes in your company.

Understanding Levels

In most instances, levels represent departments, cost centers, profit centers, or geographical regions. An organization structure models the operations of your business and the way data rolls up for planning and analysis purposes. Levels can be used to represent divisions within a company or network of companies. The organization structure determines how the various levels roll up in a hierarchical fashion.

Level access is the primary method of controlling which users can see what data. The levels a user has permission to see (either through the role assigned to them or through access granted directly to them on the Edit User screen) dictate the data they can view throughout the SSR Collection. For more information on users and roles, see Chapter 16: Managing Users and Roles.

The SSR Services team can work with your company to determine the best structure to use in your particular instance of the software.

Once an organization structure is created, levels can be further identified and differentiated with dimensions and attributes, which are covered in Chapter 4: Defining Dimensions and Chapter 3: Defining Attributes.

Navigating the Manage Organization Structure Screen

Your organization structure is managed from the **Manage Organization Structure** screen. Access this screen by going to **Admin > Organize**.



Note: When you make changes on the **Manage Organization Structure** screen, the changes are global in nature. This means that the changes apply to all versions to which the level is available, regardless of the version status, including locked versions.

The **Organize** screen consists of two main areas: the organization tree itself, on the left, and the Level Details area on the right. There's also a toolbar which contains several icons.

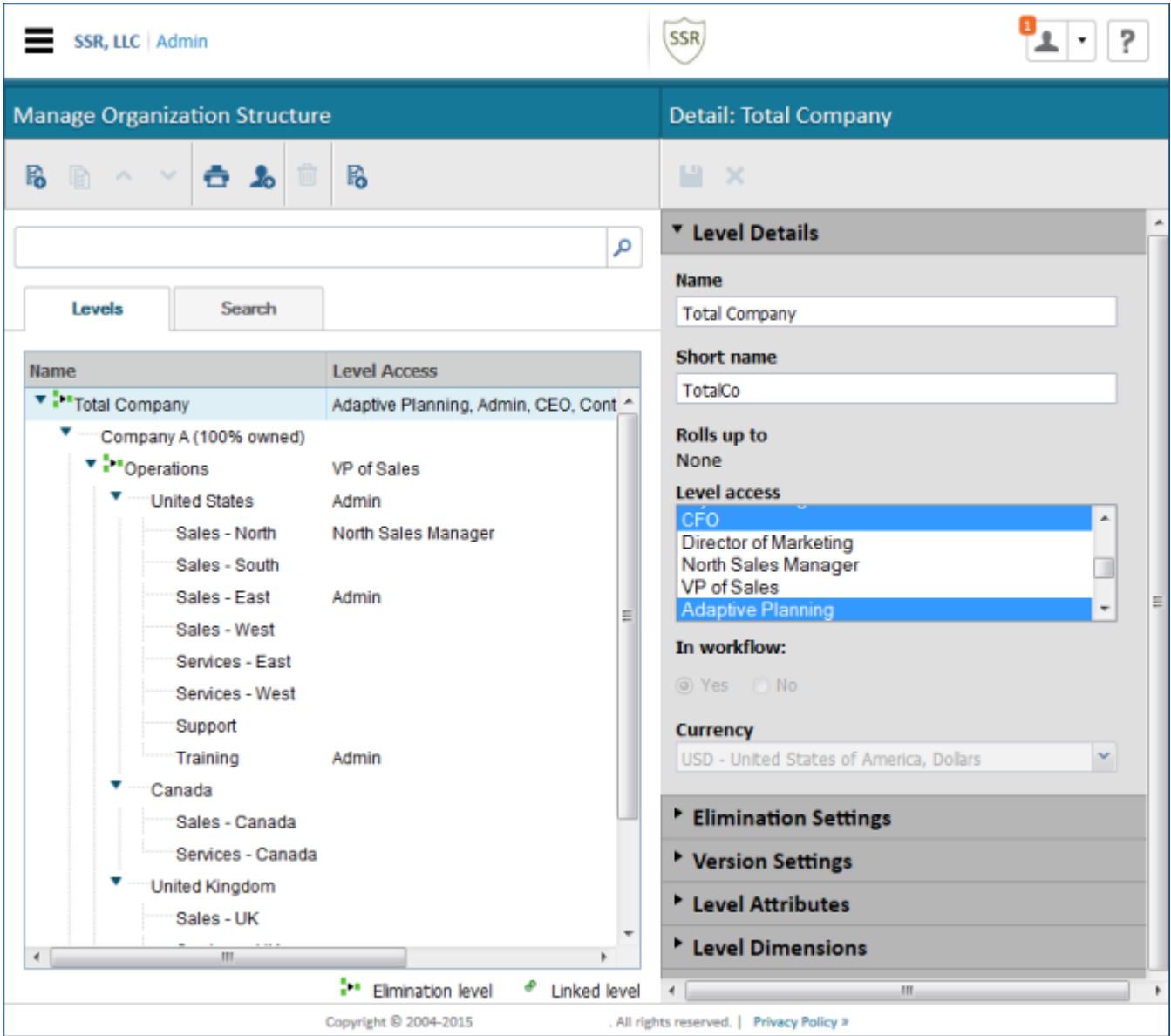









Figure 11: The Manage Organization Structure screen.

The toolbar consists of the following buttons:

Table 2: Manage Organization Structure screen toolbar icons

Button	Action
	New Level: Create a new level as a child of the selected level
	Clone Level: Clone the selected level





Table 2: Manage Organization Structure screen toolbar icons

Button	Action
	Move Up: Move selected item up in the list
	Move Down: Move selected item down in the list
	Printable View: Exports organization data into an Excel spreadsheet
	Export Level Access: Generates an Excel spreadsheet detailing which users have access to which levels
	Import: Open Import dialog to download structure template and/or upload completed template
	Save: Save changes to details
	cancel: Discard changes to details

The **Levels** tab displays your organization structure, organized hierarchically, with the users able to access each level listed next to the level's name. If you have a large number of levels, when you begin expanding the list, the view changes from tree to paginated mode.

You can navigate the paginated view using the icons at the bottom of the pane:


Table 3: Pagination icons and their effects

Icon	Effect	Icon	Effect
	First		Last
	Previous		Next
	Refresh		

Adding a New Level

You can add new levels individually from the **Manage Organization Structure** screen or in a group using **Append Import**. If your model is still in the implementation phase, you may want to import the organization structure.

To create an individual new level, do the following:

1. Go to **Admin > Organize**.
2. In the organization tree on the left, highlight the level you want to act as the new level's parent level (the level to which the new level rolls up).
3. Click **New Level** .

The **Level Details** area of the screen becomes editable.



Note: If you are adding a set of new levels, create the parent levels first, followed by the sub-levels.

4. Specify the details for the new level in the **Level Details** area.
See “Defining Level Details” on page 39.



Note: If you only want the new level to appear in your current version and no previous versions, select a previous version in the **Version** drop-down menu and uncheck **Available in Version**. Repeat this for all versions from prior years.

5. Click **Save** to create the new level.
Once you have created the new level, drag and drop or use **Move Up** and **Move Down** to change its location in the structure. When using drag-and-drop, click the level to select it, then click again to drag it to its new location. To reparent a level, select it and change the **Rolls up to** field or drag and drop it onto its new parent.

To add multiple levels at once, click **Import**. The process is very similar to the one used when importing the original structure of your model. For details on using this method, see “Importing an Organization Structure” on page 37.


Cloning an Existing Level

Another way to add a new level is to clone an existing one and make it available in unlocked versions. This process creates a new level with some or all of the content and properties of the source level.



Note: Parent levels and linked levels cannot be cloned.

To clone a level, do the following:

1. Go to **Admin > Organize**.
2. In the **Levels** list on the left side of the screen, highlight the level you want to clone.
3. Click **Clone Level** .
The Level Details area becomes editable and displays the details for the level you are creating.
4. Make changes to the new level’s details as necessary.
5. Click **Save**.

When you clone a level, all applicable existing information in the source level is copied:

- All cell contents are copied, in all versions in which the new level is available(exception: If you are creating a clone of the actuals version, only the formulas are copied, not the facts).
- All sheet notes and cell notes in all available versions are copied to the clone.
- All rules that involve the original level in some way will also be available to the clone, unless overridden by access permissions.
- All shared formulas for the source level are applied to the clone, if they are in a version where the clone is available.

- All report parameters which have the original level as a parameter choice also have the clone as a parameter choice.
- All export mappings for the original level are copied to the clone.
- If, during creation of a clone (before clicking **Save**), the **Rolls up To** is changed, the clone inherits the formulas of that parent, not the source level.

Some existing information in the source level is not copied:

- Import mappings
- Workflow status data
- Audit trail data
- The clone is not added to reports which currently contain the source level, but the clone is made available as an option in any report parameters that contain the source level.


Deleting a Level

If you no longer need a particular level or any of its data (both historical and current), you can delete it from your model.



Warning: Deleting a level deletes it, all of its data, any sub-levels that exist under it, and all of their data from all versions, including locked, hidden, and actuals versions. If you want to retain historical data for a particular level for certain versions, **do not delete** the level. Retire it instead. See “Retiring a Level” on page 35.


To delete a level, do the following:

1. Go to **Admin > Organize**.
2. In the **Levels** list on the left side of the screen, highlight the level you want to delete.
3. Click **Delete Level** .

Retiring a Level

Retiring a level causes it to be visible only in older versions and not in the current version. This is an alternative to deleting a level, which removes it from all versions.

To make a level unavailable to your current version:

1. Go to **Admin > Organize**.
2. In the **Levels** list on the left side of the screen, highlight the level you want to edit. The **Level Details** area on the right side of the screen becomes editable and displays the selected level's details.
3. Set the **Version** drop-down menu to your current version.
4. Uncheck **Available in Version**.
5. Click **Save** .

Printing the Organization Structure

When you click **Printable View** at the bottom of the **Manage Organization Structure** screen, the entire organization structure (including owners, roll-up structures, and sheets available at each level) is downloaded into an Excel file.

	A	B	C	D	E	
1						
2	Margaret Carter at SSR, LLC					
3						
4	Name	Short Name	Level Access	Rolls Up To	Excluded From Workflow	Function
5	Total Company	TotalCo	Controller, CEO, Admin, Adaptive Planning	None	No	Global
6	Company A (100% owned)	Co.A		Total Company	No	Global
7	Operations	Ops	VP of Sales	Company A (100% owned)	No	Global
8	United States	US	Admin	Operations	No	Global
9	Sales - North	Sales-N	North Sales Manager	United States	No	
10	Sales - South	Sales-S		United States	No	
11	Sales - East	Sales-E	Admin	United States	No	
12	Sales - West	Sales-W		United States	No	
13	Services - East	Svcs-E		United States	No	
14	Services - West	Svcs-W		United States	No	
15	Support	Support		United States	No	
16	Canada	Can		Operations	No	Global
17	Sales - Canada	Sales-Can		Canada	No	
18	Services - Canada	Svcs-Can		Canada	No	
19	United Kingdom	UK		Operations	No	Global
20	Sales - UK	Sales-UK		United Kingdom	No	
21	Services - UK	Svcs-UK		United Kingdom	No	
22	Global Support (discontinued in 2015)	Global Support		Operations	No	
23	Corporate	Corp		Company A (100% owned)	No	Global
24	Marketing	Mktg	Director of Marketing	Corporate	No	
25	Research & Development	R&D		Corporate	No	Finance
26	General & Admin	G&A		Corporate	No	Global
27	Executive	Exec		General & Admin	No	Global
28	Finance	Fin		General & Admin	No	Global
29	Information Technology	IT		General & Admin	No	Global
30	Human Resources	HR		General & Admin	No	Global
31	Company B (40% owned)	CoB - 40%	Admin, Adaptive Planning	Total Company	Yes	Global
32	Company B	Co.B		Company B (40% owned)	Yes	Finance
33	Product Management	ProdMgmt		Company B	Yes	Finance
34	Product Development			Company B	Yes	Finance
35	Design			Product Development	Yes	Finance
36	Production			Product Development	Yes	Finance
37	QA	QA		Product Development	Yes	Finance
38	Company C (80% owned)		Controller, CEO, Admin, Adaptive Planning	Total Company	No	
39	Proposed Acquisition Company		Controller, CEO, Admin, Adaptive Planning	Total Company	No	
40						
41						
42	Apr 20, 2015 4:00:28 PM PDT					
43	Confidential Information. Do not distribute without permission.					
44						
45						
46						

Figure 12: An organization structure exported into a spreadsheet.

Editing an Existing Level

To make changes to an existing level, do the following:

1. Go to **Admin > Organize**.
2. In the **Levels** list on the left side of the screen, highlight the level you want to edit. The **Level Details** area on the right side of the screen becomes editable and displays the selected level's details.
3. Make whatever changes are necessary to the level's details. To re-parent a level, adjust the **Rolls up to** field.



Warning: Any structural changes made on the **Manage Organization Structure** screen apply to all versions, including locked and actuals versions.

4. Click **Save**.

If the only change you are making is re-parenting the level, you can drag and drop it to its new parent. To do this, click the level to select it, then click it again and drag it to its new location in the organization structure.

When you re-parent a level, all the data and formulas in the level remain intact and move with it to its new location in the organization structure.

Exporting Level Access

Exporting level access creates a spreadsheet of all users with access to each level.

From the **Edit User** page, click **Export Level Access** at the bottom of the screen. This generates a comma-separated values (CSV) file with two columns, **Level** and **User Name**, sorted by **Level**, and containing one row for each user with access to a particular level.

Granting Partial Administrative Access

You can grant some users high-level administrative privileges, but only for the levels to which they have access. Users with this role are often referred to as Partial Organization Admins, since they administer only part of the organization structure. Creation and management of this role is handled under user management. For information on role management, see Chapter 17: Adding or Editing Roles.

Importing an Organization Structure

If you are going to add multiple levels at once, it is generally faster to use the import function rather than create each level manually. To do this, you first need to create a spreadsheet containing the new level information in the correct format, then import it.



Note: If you don't see the **Import** option, the Structure Import permission needs to be added to your role or you need to be given a role with Structure Import Permission.

To download a template for creating an importable organization structure, do the following:

1. Go to **Admin > Organize**.
2. Click **Import** in the upper right of the screen.
The Import dialog appears, as shown in Figure 13.

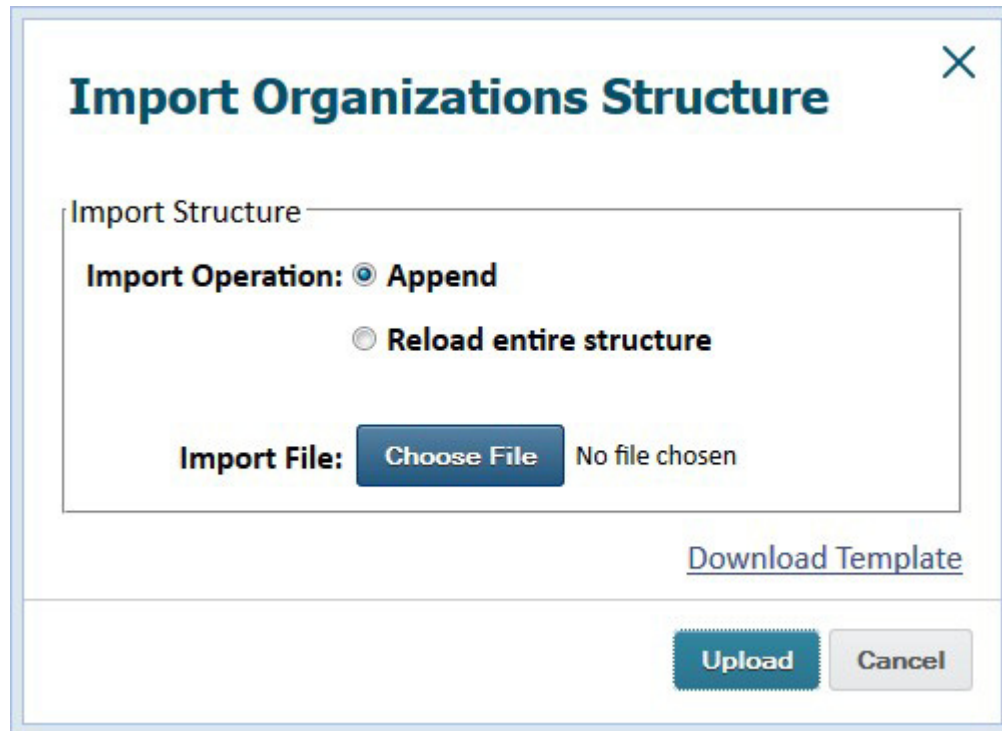


Figure 13: The Import Organization Structure dialog.

3. Click **Download Template**.
A dialog letting you save or open the template appears.
4. Save the template to a convenient location on your computer.

The template itself contains instructions for entering the information you are going to import. Open it in Microsoft Excel and follow the instructions.

Once the import spreadsheet is complete, import it into Adaptive.

To import an organization structure:

1. Go to **Admin > Organize**.
2. Click **Import** in the upper right of the screen.
The Import dialog appears.
3. Choose whether to append the new levels to your existing organization structure or to replace your entire structure with new levels.



Warning: Reload Entire Structure erases all data in the model, so be sure to choose the correct option!



Note: If the import file contains level names that are already in use and **Append** is being used, an error message appears. **Append** cannot be used to change attributes of existing levels or to re-parent existing levels in a structure hierarchy.

4. Click **Choose File**.
A file upload dialog appears.
5. Choose the file containing your new levels and click **Open**.
6. Click **Upload**.

Defining Level Details

Exactly what fields appear in the Level Details box depends on the various modules installed, but these are the possible fields:

- **Name:** The level's name.
- **Short name:** Optional. The level's short name is used to abbreviate its name in contexts like Discovery where short names are used to improve visualization.
- **Rolls up to:** The level's parent level, if any.
- **Level access:** Users listed here have access to this level but not its parent. Users who have access to the parent level of this level automatically have access to this level, regardless of whether they appear in the Level Access control for this level. Those without access are unable to see any of the data stored in this level, even if they have access to sheets or reports which reference it.
- **Currency:** The currency which is used on the level.
- **Version and Available in Version:** This paired drop-down list and checkbox let you determine whether the level is available to all planning versions or only some (you cannot change the visibility of a level for the actuals version. All levels are always visible in the actuals version). Sub-versions do not appear in the version list, and any sub-versions are assigned the same visibility properties as their parent version.
- **Level Attributes:** This field is a list of all defined level attributes, with their values as drop-down menus. For more information on attributes, see Chapter 3: Defining Attributes.
- **Level Dimensions:** This field is a list of all defined level dimensions, with their values as drop-down menus. For more information on dimensions, see Chapter 4: Defining Dimensions.
- **Elimination Settings** (Frabbusware only)
 - **Elimination Level:** This marks the level as one where eliminations take place. See the Frabbuswares guide for more information.
 - Trading Partner attribute and values, if any, are listed here. If the level in question is a trading partner, select the appropriate value.
- **Sheets:** Check the boxes next to sheet titles to make them available to users with access to view this level.