Setting Up Your Organization Tree in FP&A Transcript

To get the most out of FP&A it's, important to configure your organization and workflow to fit your company's needs. A proper organization and workflow is critical for setting up your budget.

When we initially set up FP&A, we create a single user for you assigned to the top position in the Organization Tree. Beyond that, it's your responsibility to build out your positions and organization tree to match your needs.

By the end of this course, you'll understand the Organization and Workflow section of your system, be able to add users to positions, as well as create new positions and Assignments. Let's look at the Organization tree and how to set it up for your company.

Select the first topic or Next to get started.

Objectives

- Organization Tree Overview
- Assigning or Delegating Users to a Position
- Adding Positions
- Adding Assignments

Organization Tree Overview

You can structure your organization tree in the format that works best for you. Often companies structure this to match their company structure. If needed, you can even create multiple trees.

Sometimes a company may want one tree for a budget workflow, and a second one that represents the company hierarchy.

The Org Tree's primary focus is managing budget workflow and data access. It is not necessary to include the entire company.

To navigate to the Organiation & Workflow section of the system, select it from the menu.

Select the Process, Organization Hiearchy and Workflow you want to modify.

If you want to create a second Organization Tree, you can open the Organization Hierarchy dropdown and select Create New.

On the Organization Tree tab, you'll see a list of colored positions and assignments.

At times, you will see different colors in this hierarchy. Each one identifies what that item is. See the key up here, you can click a checkbox to hide or show those items.

These colors are:

Blue for positions.

On the position label, the current Holder is listed on the left followed by the position name on the right.

Each position can have only a single holder. The system grants the current holder all the dimension permissions associated with that position.

The green items indicate users Delegated to a position.

You can delegate multiple people to a position. When you assign a user as a delegate, they receive all the rights of that position.

Yellow items indicate an Assignments.

Typically, assignments are associated with an input sheet. When assigned to a position, they grant related data permissions to the holder and the delegates of that position.

Grey items are for Subscriptions.

Subscriptions are used for automated email distribution lists from reports.

Note that non-licensed users can be included in subscriptions.

We'll cover each of these as they come up, but for now, let's talk about positions.

Each blue line represents a position, not just a person. Select the top one to see its details.

The pane on the right shows the details of that position. By default, the Organization Position tab displays showing general information about it, including, what position it reports to, the level it is in the Organization Tree, and who is assigned or delegated to this role.

The Data Access Tab manages what Dimensions and DataClasses this position can access.

Home controls what My Page configurations and home dimension members they have access to,

And finally, the Reports tab lets you limit or allow the position's access rights to reports.

Select Next for a quick knowledge check before seeing how to assign or delegate positions.

Assigning or Delegating Users to a Position

Users assigned as a Holder or Delegate to a position receive the security rights and assignments associated with that position.

To add or delegate a user to a position, begin by selecting it from the hierarchy. For this example, lets change the holder of the CFO role. Go ahead and Select it.

A position can only have one holder at a time.

In this case, Penny is the holder of the CFO role. Let's remove her and add Jordan.

Right Click Penny's name,

Select Remove.

The system removes Penny. Now press the + button to add the new user.

Enter the details. Only the User is required, but you can enter a timeframe if you only want the user as a holder for a specific range of time.

We'll enter the details for you. We've selected the user Jordan. Select Apply to submit the change.

You must apply changes before selecting another role or tab. If you move away from this tab before doing so, your changes will revert.

Select Apply Changes.

The selected user appears in the Holder section and is attached to the role on the hierarchy.

On the position label, the holder appears on the left and the name is on the right.

If you haven't already done so, make sure to set the person assigned to the top node in the tree to the appropriate user in your system, and name it so. For this example, we have a user named Scott assigned to the CEO position, but this should be the name of the user that you want to hold that position in your environment.

If you're using an organization tree for only a budget workflow this may be the person responsible for final approvals.

If you want multiple users to have the permissions of a position, use the Delegate function. This gives delegated users all the permissions related to it. Unlike holders, you may assign multiple delegates.

This is useful if an employee is taking some time off, and you want to assign their permissions to another person during that time.

In the Organization Position tab of the position, select the + button by the Delegate box.

Select the + button.

Enter the details. Only the user is required, but you can enter a timeframe if you only want the user as a delegate for a specific range of time.

We'll enter the details for you, this time using Andrew. Select Apply to submit the change.

The system adds the user as a delegate. Click Apply changes to save the action.

The user displays in the Organization Tree in Green.

Now you can add another delegate or navigate to another page.

Select Next to take a knowledge check and move onto the Adding Positions topic.

Adding Position

To add a new position, select the existing position you want it to fall under.

Look in the details panel and select Add Organization Position.

Go ahead and select it now.

Enter the Organization Position type, name, and description.

By default, the Reports To field corresponds to the position you select before creating this, but you can select this dropdown to manually set it to a different one.

We'll complete this example for you…

Now select Apply Changes to submit the new position.

The new position appears in the hierarchy. From here you can add a holder and delegates.

You can even add new positions or assignments under it. Let’s add a new assignment. Select next to see that process.

Adding Assignments

Adding Assignments to a Position gives users holding or delegated to that position permissions to access and modify the input sheet related to that Assignment.

For this example, let’s add an assignment to the role created in the previous section.

To add an assignment, select the Position you want to apply it to.

In the Organization Position tab, select Add Assignment.

Enter the Assignment details. Make sure to select the correct budget and input sheet details. We’ve already entered the details for you.

With the info entered, select Apply Changes.

The new assignment appears under the position in the Hierarchy tree.

Remember, when you’re done making changes, deploy Users and Roles if you need the changes to take effect immediately.

After creating the assignment, you’ll need to adjust dimensions to generate the input sheet and grant data access appropriately.

Select next to move onto the recap to wrap up the course.

Recap

Great work completing the Setting up your organization course.

You should now be able to understand the Organization and Workflow section of your system, add users to positions, as well as create new Positions and Assignments.

Select Exit course to close the window.

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