

Org Manager

—
Application Overview

KINCENTRIC>

Employee Files | Page Overview

The Employee Files page is the Home Page when entering the application. It is used when you want to build hierarchies using an employee file. It provides a list of all employee files uploaded within your account.

The screenshot shows the Kincentric application interface. The top navigation bar includes the Kincentric logo, 'ORG MANAGER', and a user profile. The left sidebar has a menu with 'Hierarchy', 'Hierarchy List', and 'Employee Files'. The main content area is titled 'Employee Files' and features an 'Upload HRIS File' button, a 'Columns (4)' dropdown, and a table of uploaded files. Callouts provide instructions: 'Upload an employee file' points to the upload button; 'More Columns' points to the gear icon; 'Hide/Show more columns' points to the 'Columns (4)' dropdown; 'Export to Excel' points to the ellipsis in the 'ACTIONS' column; 'Use when you have an employee file that will be used to create hierarchies' points to the 'Employee Files' menu item; and 'Click to view file details' points to a file icon in the table.

Home Page
Welcome, randi.erickson@kincentric.com

Employee Files

Upload HRIS File

Columns (4)

Hide/Show more columns

NAME	EMPLOYEES	HIERARCHIES	ACTIONS
HRIS People Dataset.xlsx01172020_041526	99	0	...
Org Manager Test.xlsx01162020_185241	14272	0	...
FBI HRIS.xlsx01162020_183152	4917	0	...
FBI HRIS.xlsx01162020_181538	4917	0	...

Export to Excel

Use when you have an employee file that will be used to create hierarchies

Click to view file details

Employee File | Details

When an employee file is uploaded, the Employee File page contains a list of all the hierarchies built using the file.

- Here is where you will edit the file data. File data changes made on this page will affect all the hierarchies built using this file.
- Create hierarchies using this file.

The screenshot shows the 'Employee File' interface. At the top, there are three tabs: 'Hierarchies', 'Employees', and 'Columns'. The 'Employees' tab is highlighted with a red box and a callout stating: 'View or edit the file data. All employee file modifications are done here.' Below the tabs, the file name is 'Example Employee File.xlsx01222020_162842', with 99 employees and 29 columns. A 'Hierarchy List' section contains a 'Create New Hierarchy' button, which is pointed to by a callout: 'Create a hierarchy using the employee file data'. Below this is a table of hierarchies. A callout points to the table: 'List of hierarchies built using this employee file data'. Another callout points to the 'Export to Excel' option in the actions column: 'Export to Excel'.

Employee File

[Hierarchies](#) **Employees** [Columns](#)

File Name: Example Employee File.xlsx01222020_162842
Number of Employees: 99
Number of Columns: 29

Hierarchy List

[Create New Hierarchy](#)

HIERARCHY NAME	TYPE	LAST CHANGED/BY	ACTIONS
Sales Organization	Managerial	Jan 22, 2020 at 10:30 am UTC	... Export to Excel
Sales Location Hierarchy	Managerial	Jan 22, 2020 at 10:31 am UTC	...

Hierarchy List | Page Overview

The Hierarchy List page provides a list of all hierarchies built within your account.

This page allows you to upload a hierarchy file that does not have a corresponding employee file.

The screenshot shows the Kincentric Org Manager interface. The top navigation bar includes the Kincentric logo and the text 'A Spencer Stuart Company'. The main header area displays 'ORG MANAGER' and a user welcome message: 'Welcome, ModernQA-HollyHolmes@modernsurvey.com'. The left sidebar contains a 'Hierarchy' menu with 'Hierarchy List' selected. The main content area is titled 'Hierarchy List' and features a table of hierarchy entries. A green 'Upload Hierarchy' button is located at the top right. Callouts provide additional context: 'Use when you only have a hierarchy file (Not an employee file)' points to the upload button; 'Download in Excel' points to the download icon; 'Delete Hierarchy' points to the trash icon; 'Hierarchy built using a hierarchy file' points to the entry 'Test Svy 3-CompanyName Non-Mgr Hierarchy'; and 'Hierarchy built using an employee file' points to the entry 'Test Svy 2b-FCL Mgr Hierarchy', which has a red box around its '(View Hris Source)' link.

NAME	LAST SAVED	Actions
Copy of KK Test Case 4-FCL Mgr Hierarchy (View Hris Source)	Jun 2, 2020 at 6:28 pm PDT	Download, Delete
Test Svy 4-FCL Mgr Hierarchy (View Hris Source)	Jun 2, 2020 at 4:01 pm PDT	Download in Excel, Delete
Test Svy 3-CompanyName Non-Mgr Hierarchy	May 8, 2020 at 6:38 pm PDT	Download, Delete
Test Svy 2b-FCL Mgr Hierarchy (View Hris Source)	May 4, 2020 at 6:20 pm PDT	Download, Delete
Test Svy 1b-CompanyName Non-Mgr Hierarchy (View Hris Source)	Apr 29, 2020 at 4:03 pm PDT	Download, Delete

Upload Employee File

- Create hierarchy using an employee file

Employee File | Example

An Employee File should contain the following columns:

1. Employee ID
2. First Name, Last Name OR a Full Name
3. Email Address
 - Survey Builder will use this column when creating a participation audience.
 - This column can be empty, but it must be included as a column
 - Ensure there are no duplicate addresses or empty values to avoid issues when sending survey invitations.

	A	B	C	D	E	H	J	K	L	M	N
	Teammate ID	Pref Name	Manager ID	Email Address	Bonus Class	Ethnicity	Overall Node	Region	Country	Location Group	Location
1	228535	Michael Kleinpaste	226615	mkleinpaste@company.com	Sr. Professional	White	Company Overall	North America	USA	Satellite Offices	Austin Office
2	329198	Jordan Strausbaugh	217734	jordan.strausbaugh@company.com	Lead	White	Company Overall	North America	USA	HQ Offices	Ivory Office
3	219872	Rylee Price	200157	rprice@company.com	Professional	White	Company Overall	APAC	HKG	Satellite Offices	Hong Kong Office
4	304917	Soledad Sulleiro	332784		Not Bonus Eligible	Not Specified	Company Overall	LATAM	CHL	Retail Stores	Easton Center
5	231503	Surja Darjee	12957		Hourly-Discretionary	Asian	Company Overall	North America	USA	Distribution Houses	Omni-Channel Distribution House
6	203801	Gwendolyn Beale	12957		Hourly-Discretionary I	Black or African American	Company Overall	North America	USA	Distribution Houses	Omni-Channel Distribution House
7	210384	Karla Whelan	312265		Not Bonus Eligible	Hispanic or Latino	Company Overall	North America	USA	Retail Stores	Silverthorne
8	219868	Brendan Robinson	211250	brobinson1@company.com	Director	White	Company Overall	North America	USA	HQ Offices	Building 37 Office
9	314950	Srijana Shrestha	235171		Hourly-Discretionary	Asian	Company Overall	North America	USA	Distribution Houses	Nashville Distribution House
10	248931	Vicky Wang	248993		Not Bonus Eligible	Not Specified	Company Overall	APAC	CHN	Retail Stores	Suzhou Outlet
11	12408	Grace Dennison	210790	gdennison@company.com	Director	White	Company Overall	North America	USA	HQ Offices	Cheer Office
12	226992	Pernille Vonk-Scholten	226193	nvonkscholten@company.com	Sr. Manager	Not Specified	Company Overall	EMEA	NLD	Satellite Offices	Amsterdam Office
13	213953	Jennifer Guerrieri-Phipps	238184	jguerrieriphipps@company.com	Lead	Two or More Races	Company Overall	North America	USA	HQ Offices	Dawn Office
14	326300	Delano Hughes	249344		Not Bonus Eligible	Black or African American	Company Overall	North America	USA	Retail Stores	Folsom
15	333306	Tasnim Ahmed	330984		Not Bonus Eligible	Asian	Company Overall	North America	USA	Retail Stores	West Palm Beach
16	1174	Angela Thomas	4829	athomas2@company.com	Assistant	Black or African American	Company Overall	North America	USA	HQ Offices	City Garage Office

Employee File | Best Practices

1. Employee data is in first tab
2. All Employee IDs must be unique
3. For manager structure, include Manager ID column
 - Make sure top node's Manager ID is blank
 - All managers should be present as employees
 - There should not be any circular references (i.e. John reports to Mary and Mary reports to John)
4. For non-manager structure, include each level in a separate column
 - Level 1 must not have blanks
 - Higher levels shouldn't be blank if there are lower levels
 - Keep the labels easy to identify to select in org manager drop-downs
 - Column labels cannot be modified within the Org Manager, so ensure the column names are accurate

Employee File | Upload

1. Click the **Navigation** icon in the top left side of the page
2. Click: **Employee Files**
3. Click: **Upload Employee File**

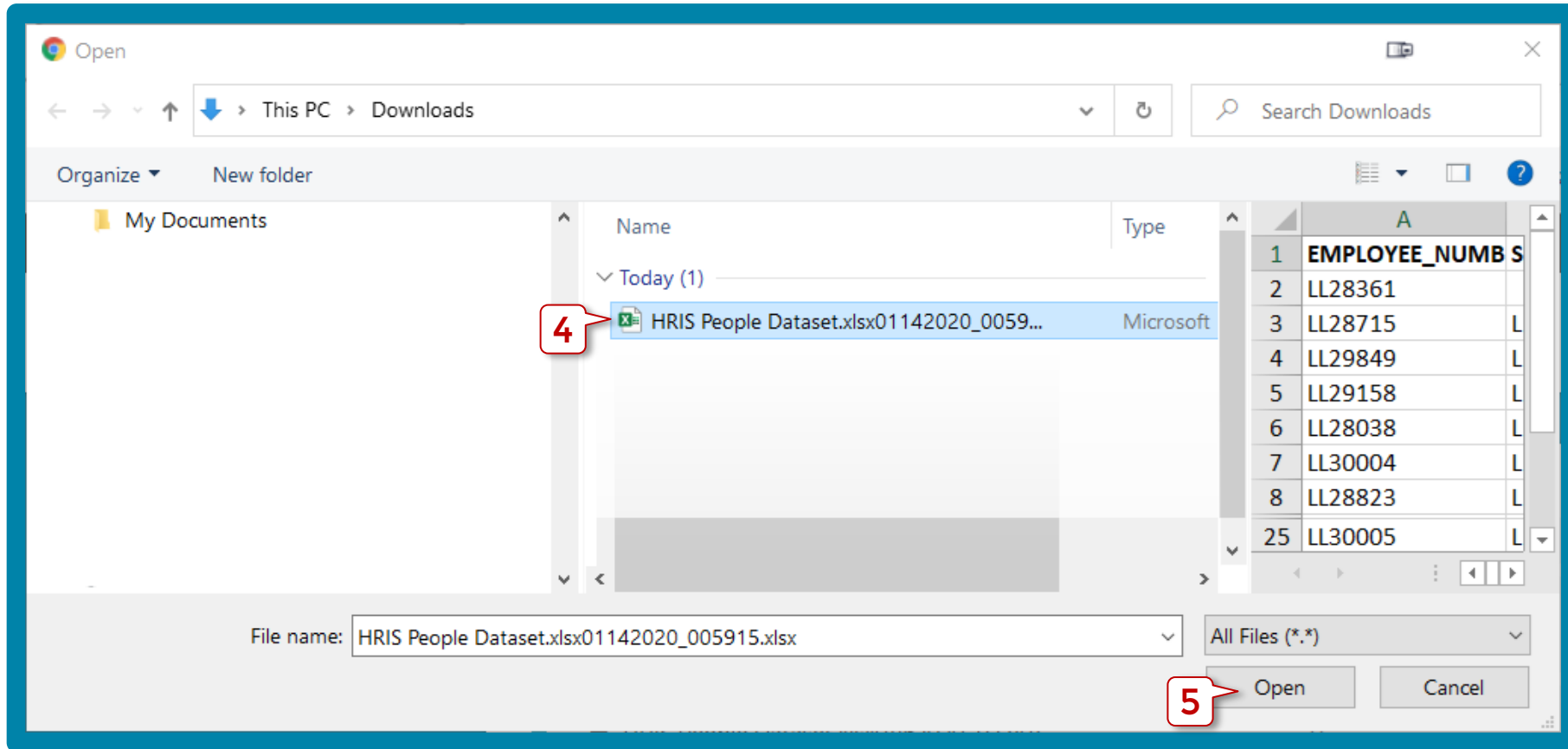
The screenshot displays the Kincentric Org Manager interface. The header includes the Kincentric logo and the text 'A Spencer Stuart Company'. The navigation menu on the left shows 'Hierarchy' and 'Employee Files'. The main content area is titled 'Employee Files' and features a table with the following data:

NAME	EMPLOYEES	HIERARCHIES	ACTIONS
HRIS People Dataset.xlsx01172020_041526	99	0	...
Org Manager Test.xlsx01162020_185241	14272	0	...
FBI HRIS.xlsx01162020_183152	4917	0	...

An 'Upload Employee File' button is located in the top right corner of the main content area.

Employee File | Upload

4. Select the **Employee File** from your computer
5. Click: **Open**



Employee File | Upload

6. **...the unique ID of an employee:** Select the Employee ID from the dropdown
7. **...the email of an employee:** Select the email column from the dropdown
8. **Values can be empty:** Turn the toggle on if you are missing any data in this column
9. **Employee Name Options:** Select the option that reflects the columns in the file
 - First and last name column
 - Single name column
10. **The First Name/Last Name/Full Name of an Employee:** Select the columns that represent these fields
11. **Click: Verify and Complete Upload**
 - Wait for validations to complete

6	B	10	C	10	7
EMPLOYEE ID	FIRST NAME	LAST NAME	Full Name	EMAIL ADDRESS	
LL28361	Albert	Dorsey	Albert Dorsey	lapislazuli.LL28361@	
LL28715	Donna	Rodriguez	Donna Rodriguez	lapislazuli.LL28715@	
LL29849	Natalie	Parr	Natalie Parr	lapislazuli.LL29849@	
LL29158	Lauren	McGrath			8
LL28038	Kara	Lyons		lapislazuli.LL28038@	
LL30004	Trevor	Oliver		lapislazuli.LL30004@	
LL28823	Nicola	Wallace	Nicola Wallace	lapislazuli.LL28823@	

Values can be empty

Verify Common Columns

We need to do a data validation for certain columns that are common in all HRIS files.
Please review the columns we identified as a match below. If a column doesn't match, please select the column that does from the dropdown.

This column represents...

...the unique ID of an employee 6

...the email of an employee 7

Values can be empty 8

First and last name column Single name column 9

...the full name of an employee 10

11

Employee File | Create New Hierarchy

1. Click: **Create New Hierarchy**

The screenshot displays the 'Employee File' interface. At the top, there are three tabs: 'Hierarchies' (which is selected), 'Employees', and 'Columns'. A callout bubble on the right side of the 'Columns' tab says 'Manage file data'. Below the tabs, the file name is 'Example Employee File.xlsx01222020_150243'. The number of employees is 99, and the number of columns is 29. Two callout bubbles point to the 'Date' and 'File ID' columns. A dark grey bar labeled 'Hierarchy List' is present, but it is empty. Below this bar, the text reads 'You Have No Hierarchies Yet'. A message below that says 'Click to the button below to start create new hierarchies based on the Example Employee File.xlsx01222020_150243 you uploaded.' At the bottom center, there is a green button labeled 'Create New Hierarchy' with a red callout bubble containing the number '1' pointing to it.

Managerial Hierarchy

1. Select: **Managerial Hierarchy** card
2. **Hierarchy Name:** Enter a detailed name
3. **Employee ID Column:** This field is already selected for you based on previous selections
4. **Manager ID Column:** Select the desired column from the dropdown
5. **Additional Attribute Column:** This is optional and can be anything that you would want displayed in the hierarchy.
6. Click: **Finish**

Generate New Hierarchy

Hierarchy Type

Choose the hierarchy type you want to generate, then identify the columns needed to generate the hierarchy.

Non-Managerial Hierarchy

This could be location, function, business unit or a hybrid combination.

Managerial Hierarchy

This is a hierarchy built on employee-to-manager relationships. It requires a ManagerID in the people attribute data.

Hierarchy Name Make sure this name accurately describe the type and purpose of the hierarchy

Sales Organization

Employee ID Column This is your Employee ID Column you identified earlier.

EMPLOYEE ID

Manager ID Column Select the column that is an employee's manager ID.

SUPERVISOR ID

Additional Attribute Column (optional) Select the additional attribute column. This is typically a job title or something similar.

SUPERVISOR NAME

Finish

Managerial Hierarchy

This page will display all the hierarchies built using this file.

- Any changes made to the Employees or Columns will automatically apply to all the hierarchies listed on this page.
- You cannot export the original file you after you have made changes to it.

The screenshot shows a web interface for managing an 'Employee File'. At the top, there are three tabs: 'Hierarchies', 'Employees', and 'Columns'. The 'Employees' and 'Columns' tabs are highlighted with a red box, and a callout bubble points to them with the text 'Manage file data'. Below the tabs, the file name is 'Example Employee File.xlsx01222020_150243'. It shows 'Number of Employees: 99' and 'Number of Columns: 29'. A dark grey bar labeled 'Hierarchy List' is present. Below this, there is a green button labeled 'Create New Hierarchy' with a callout bubble that says 'Create more hierarchies using this employee file'. A table below shows a list of hierarchies. The first entry is 'Sales Organization' with a folder icon, type 'Managerial', and last changed 'Jan 22, 2020 at 9:18 am UTC'. A callout bubble points to the 'Sales Organization' name with the text 'View hierarchy'. Another callout bubble points to the three-dot menu icon in the 'ACTIONS' column with the text 'Export to Excel'.

Employee File

Hierarchies Employees Columns

Manage file data

File Name: Example Employee File.xlsx01222020_150243


Number of Employees: 99

Number of Columns: 29

Hierarchy List

Create more hierarchies using this employee file

Create New Hierarchy

HIERARCHY NAME	TYPE	LAST CHANGED/BY	ACTIONS
 Sales Organization	Managerial	Jan 22, 2020 at 9:18 am UTC	...

View hierarchy

Export to Excel

Managerial Hierarchy Results

Sales Organization [Edit hierarchy file name]

Search Table [Search]

Overall Hierarchy

Total Employees: **99**

Direct Report Breakdown

16	Donna Rodriguez
16	Natalie Parr
15	Kara Lyons
15	Lauren McGrath
15	Trevor Oliver
0	Blake McDonald
0	Cameron Quinn

Levels: 3
Open Positions: 0
Blank Titles: 2
Unparented Employees: 0
Change Log: [View]

level 1	2	3	4	5	6	7	8	9	16
Albert Dorsey / (blank)	● Stacy Ferguson / Alan O'Neal	● Liam Black / Ashley Houston	● Cameron Quinn / Barry Mitchell	● Jean Bowers / Bryan Lawrence					
▼ Donna Rodriguez / Carmen Hayes	● Isaac Henderson / Angela Thornton	● Gordon Berman / Bonnie Marcus	● Shawn Rose / Charlene Sullivan	● Paige Petersen / Donna Adkins	● Brenda Pittman / Glenda Humphrey	● Dominic Gibson / Hazel Underwood	● Betsy Epstein / Henry Dale	● Ian Ogden / Holly Graves	● Lynne Foley / Holly Hardy
	● Dylan Parr / Jan	● Ti	● G	● Keith McDonald / Leigh Yates					

[Expand for details]

[Additional Attribute Column selection]

[Export to Excel]

External Link

This is a shareable link that allows outside users access to a readonly version of this hierarchy

External Link: <https://orgmanager-uat.modernsurvey.com/externa>
[Copy link to clipboard](#)

Disable External Link:

Require Access Code: W2zH6mqTtg

[Close](#) [Cancel](#)

Create & manage external links for others to view this hierarchy

Non-Managerial Hierarchy

Non-Managerial Hierarchies use columns of data to build a hierarchy.

Examples: Region, Country, State, Province, Building

1. Click the **Non-Managerial Hierarchy** card

Generate New Hierarchy

Hierarchy Type

Choose the hierarchy type you want to generate, then identify the columns needed to generate the hierarchy.

Non-Managerial Hierarchy
This could be location, function, business unit or a hybrid combination.

Managerial Hierarchy
This is a hierarchy built on employee-to-manager relationships. It requires a ManagerID in the people attribute data.

Non-Managerial Hierarchy

- Hierarchy Name:** Enter a detailed name
- Type:** Select the type of hierarchy you are creating
 - Location
 - Function
 - Business Unit
 - Hybrid
 - Other
- Top Level:** Select the first level in the structure such as 'Region'
- Add Level:** Click to add more levels to the structure. You can add up to 16 levels.
- Click: **Finish**
- Review any **warnings** on the page. Use the **info icon** to see the warning details
- Click: **Finish and ignore warnings**

The screenshot shows a configuration page for a Non-Managerial Hierarchy. It includes several sections: 'Hierarchy Name' with a text input field containing 'Location Hierarchy' (callout 2); 'Type' with a dropdown menu set to 'Location' (callout 3); 'Top Level' with a dropdown menu set to 'Region' (callout 4); and 'Level 2' with a dropdown menu set to 'Country' (callout 7). Below these are two tables showing employee counts for different regions and countries. The first table has columns 'VALUE' and 'EMPLOYEES' with rows for 'APAC' (20) and 'EMEA' (15). The second table has rows for 'AUS' (5) and 'CAN' (5). A red warning icon with '!!' is visible next to the 'Level 2' dropdown (callout 7). At the bottom, there is an 'Add Level' button (callout 5) and a green 'Finish and ignore warnings' button (callout 6 & 8).

Hierarchy Name Make sure this name accurately describe the type and purpose of the hierarchy

Location Hierarchy **2**

Type Select non-managerial hierarchy type (each type can be used one time per employee file)

Location **3**

Levels

Top Level Select column from the dropdown below that is the **top level** of your hierarchy

Region **4**

4

VALUE	EMPLOYEES
APAC	20
EMEA	15

Level 2 Select column from the dropdown below that is the **2nd level** of your hierarchy

Country **7**

10

VALUE	EMPLOYEES
AUS	5
CAN	5

5 Add Level

6 & 8 Finish and ignore warnings

Non-Managerial Hierarchy


Use the Edit Icon to update the values if needed

1. Click the **Edit Icon** for the values you want to update
2. Enter the **New Value**
3. Click: **Change Value**

Top Level Select column from the dropdown below that is the **top level** of your hierarchy

STATE


Total Column Values 26


VALUE	EMPLOYEES	
CA	10	
CO	1	

Change Value

By changing this value, it will change the attribute value for **10 employees**

Old Value CA

New Value California 

Cancel Change Value 

Non-Managerial Hierarchy | Results

You cannot make edits directly to this page.

Updates made from the Employee File page will reflect here.

System does not support two top levels

- The system will take the largest population group and put it on top.
- The smaller populations will be in the 'Unparented' section

The screenshot displays a web-based interface for a Non-Managerial Hierarchy. On the left, a sidebar titled 'Overall Hierarchy' provides a summary: Total Employees: 99. Below this is an 'Employee Breakdown' bar chart showing counts for various states: IL (5), MN (5), IN (4), CA (3), GA (2), SC (2), and CT (1). Further down, it lists 'Total Nodes: 282', 'Open Positions: 0', 'Unparented Nodes: 44', 'Unparented Employees: 0', and a 'Change Log' link.

The main area shows a hierarchical tree structure across levels 1 to 16. Level 1 is 'Home Delivery'. Level 2 includes 'CA'. Level 3 includes 'Log Angeles'. Level 4 includes 'Home Delivery & Assembly Technician', which is expanded to show 'Brenda Pittman' and 'Kathleen McLeod'. Level 5 includes 'San Diego'. Other levels (6-16) show various state abbreviations (CT, GA, IL, IN, LA, MN, NE, SC) and an 'Unparented' section at the bottom with 'ABQ Uptown', 'NM', and 'TX'. Callouts highlight 'Home Delivery' as the 'Largest population group' and 'ABQ Uptown' as the 'Smallest population group(s)'. A callout points to the expanded 'Home Delivery & Assembly Technician' node, stating 'Expand to see the list of people'. Another callout points to the 'Brenda Pittman' node, stating 'Click to see employee details'.

The 'Brenda Pittman' popup window displays the following information:

Employee ID	LL28,722
Email	lapislazuli.LL28,722@modernsurvey.com
EMPLOYEE ID	LL28722
FIRST NAME	Brenda
LAST NAME	Pittman
Full Name	Brenda Pittman
EMAIL ADDRESS	lapislazuli.LL28722@modernsurvey.com
SUPERVISOR ID	LL28715
SUPERVISOR NAME	Glenda Humphrey
IS Manager	No
SUPERVISORY	LL18659
ORG ID	
BUSINESS UNIT	Operations
Position Name	Cabinet Expert
LOCATION	Home Delivery
AGE	23
AGE GROUP	Gen Y/Millennials (born 1980-2000)
CFNDFD	F
Full Path	...

Bulk Edits

- Edit the details of an employee file
- Update all hierarchies using the employee file

Bulk Edits | Employees

Hierarchies created using an employee file can only be modified in the employees file page.

- It is recommended that if you're changing a considerable amount of values, we suggest uploading a new file and rebuilding the hierarchy which is faster than editing 100's of employees and possibly making editing errors.
- Export to Excel will contain any changes made to the file.
- You will not be able to export an original version of the file after you make changes.

1. Click the **Navigation** icon
2. Select: **Employee Files**
3. Click on the **Name** of the file you want to edit
4. Click: **Employees**

Example Employee File.xlsx01222020_162842

Hierarchies Employees **4**

File Name: Example Employee File.xlsx01222020_162842
Number of Employees: 99
Number of Columns: 29

Hierarchy List

Create New Hierarchy

HIERARCHY NAME	TYPE	LAST CHANGED/BY	ACTIONS
Sales Organization	Managerial	Jan 22, 2020 at 10:30 am UTC	... Export Hierarchy
Sales Location Hierarchy	Non-Managerial	Jan 22, 2020 at 10:31 am UTC	...

Making changes to this file will affect all the hierarchies listed

Bulk Edits | Employees

Bulk Actions allow you to make changes to the employee data in the file.

In this example, we will change the manager from Hazel Underwood to Christina Harris for all employees that currently report to Hazel.

1. Click the **View More** icon to display up to 200 people on the page. This will allow you to view more people that you might need to select.
2. Click the **Expander** to display the search bar
3. Add more **Columns** if desired. (Supervisor Name)
4. Use the **Search** to enter in a criteria that fits all the employees you want to change (Hazel).
5. Use the **Select All** feature to select everyone or select each user by clicking on the **Checkbox** next to their name
6. Click the **Bulk Actions** dropdown and select: **Edit**

The screenshot shows a web interface for managing employee data. At the top, the file name 'Example Employee File.xlsx01222020_1628' is displayed. On the right, there are tabs for 'Hierarchies', 'Employees' (which is selected and highlighted with a red box), and 'Columns'. Below this is a header 'Employees and Their Attributes'. The main area contains a table of employees with columns for 'EMPLOYEE ID', 'NAME', 'EMAIL', and 'SUPERVISOR NAME'. A search bar is located above the table, and a 'Bulk Actions' dropdown menu is at the top left. A 'View More' icon (1) is next to the page number '1/1' and '200'. A search bar (2) contains the text 'Hazel'. A 'Columns' dropdown (3) is set to '(4)'. A 'Bulk Actions' dropdown (6) is open. A 'Select All' checkbox (5) is checked for the first row. A 'Settings' gear icon (2) is in the top right. The table data is as follows:

EMPLOYEE ID	NAME	EMAIL	SUPERVISOR NAME
LL27868	Darlene Dickson	lapislazuli.LL27868@modernsurvey.com	Hazel Underwood
LL27431	Hazel Hamilton	lapislazuli.LL27431@modernsurvey.com	Christina Harris
LL29884	Blake McDonald	lapislazuli.LL29884@modernsurvey.com	Hazel Underwood
LL29790	Dominic Gibson	lapislazuli.LL29790@modernsurvey.com	Hazel Underwood
LL28059	Marcus Shaw	lapislazuli.LL28059@modernsurvey.com	Hazel Underwood
LL27727	Larry Schneider	lapislazuli.LL27727@modernsurvey.com	Hazel Underwood
LL26482	Melanie Melton	lapislazuli.LL26482@modernsurvey.com	Hazel Underwood

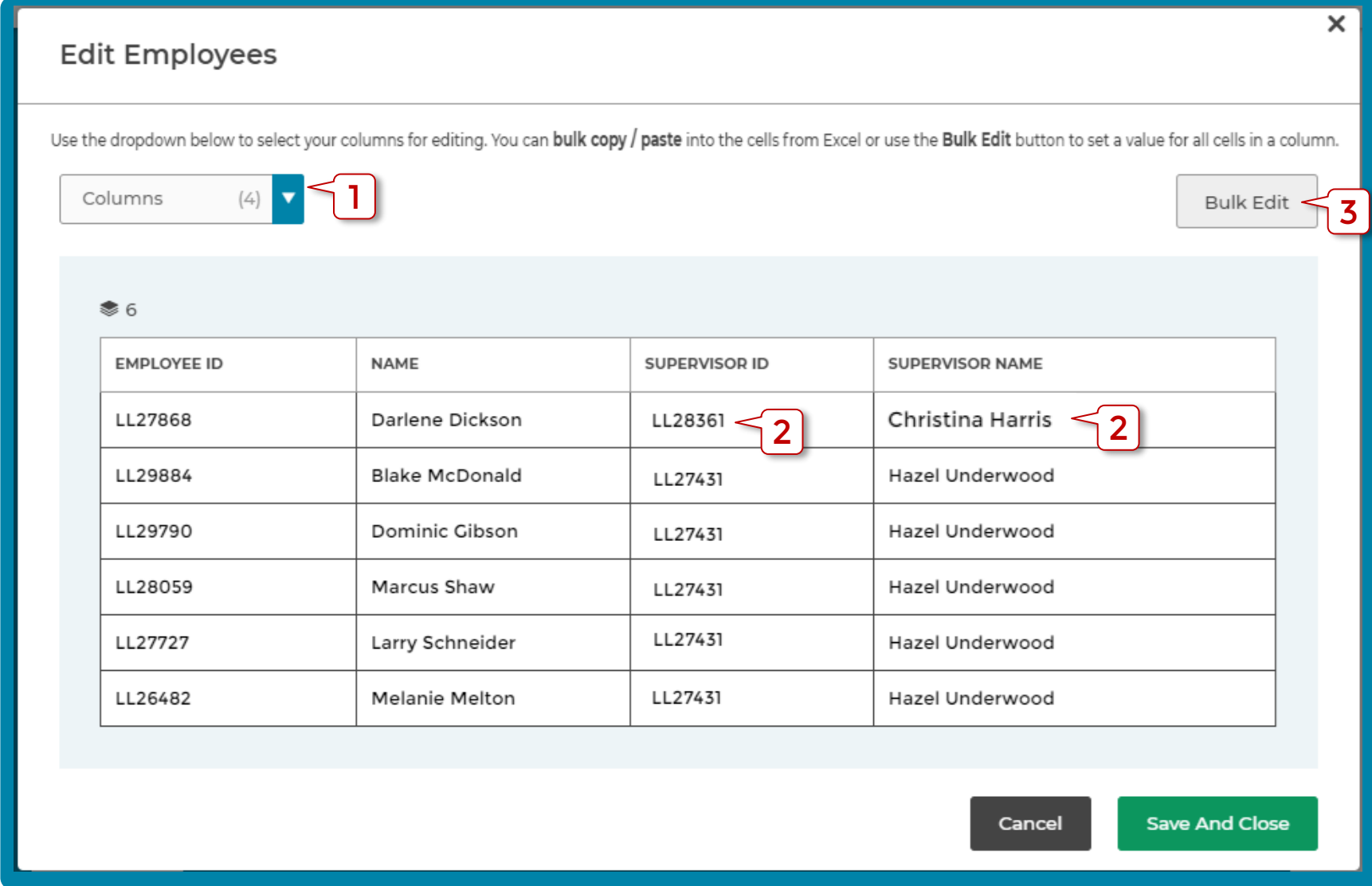
Bulk Edits | Employees

When updating a field, don't forget to update all related fields. In this case we would update both Supervisor ID and Supervisor Name.

1. Add **additional columns** as needed. (Supervisor Name)
2. Edit directly **in the table** (Row 1)

OR

3. Click **Bulk Edit** to change data for everyone. (see next slide)



Edit Employees

Use the dropdown below to select your columns for editing. You can **bulk copy / paste** into the cells from Excel or use the **Bulk Edit** button to set a value for all cells in a column.

Columns (4) 1 Bulk Edit 3

6

EMPLOYEE ID	NAME	SUPERVISOR ID	SUPERVISOR NAME
LL27868	Darlene Dickson	LL28361 2	Christina Harris 2
LL29884	Blake McDonald	LL27431	Hazel Underwood
LL29790	Dominic Gibson	LL27431	Hazel Underwood
LL28059	Marcus Shaw	LL27431	Hazel Underwood
LL27727	Larry Schneider	LL27431	Hazel Underwood
LL26482	Melanie Melton	LL27431	Hazel Underwood

Cancel Save And Close

Bulk Edits | Employees

4. Select the **Column** that contains the data you want to change. (Supervisor Name)
5. Enter the **New Value**
6. **Repeat** for other columns (Supervisor ID)
7. Click: **Change**
8. Review the **Change Summary**
9. Click: **Save and Close**

Change All Values

SUPERVISOR NAM

Change all value in the column SUPERVISOR NAME to:

Christina Harris

Cancel Change

Edit Employees

Use the dropdown below to select your columns for editing. You can **bulk copy / paste** into the cells from Excel or use the **Bulk Edit** button to set a value for all cells in a column.

Columns (4)

Bulk Edit

EMPLOYEE ID	NAME	SUPERVISOR ID	SUPERVISOR NAME
LL27868	Darlene Dickson	LL28361	Christina Harris
LL27431	Hazel Hamilton	LL28361	Christina Harris
LL29884	Blake McDonald	LL28361	Christina Harris
LL29790	Dominic Gibson	LL28361	Christina Harris
LL28059	Marcus Shaw	LL28361	Christina Harris
LL27727	Larry Schneider	LL28361	Christina Harris
LL26482	Melanie Melton	LL28361	Christina Harris

Cancel Save And Close

Employee Details | Uploads

Use the **Uploads** feature when you want to add employees in bulk or add new columns and values by uploading a revised file.

- You cannot use this to upload revisions to existing employees already uploaded.
- You cannot remove existing columns or revise column names.

Revised File Upload Options:

- New Employees: All the columns of the revised file **must be identical** to your base employee file. The uploaded file values will also be checked to ensure it will support the existing hierarchies already built.
- New Columns and Values: The revised file **must contain** an Employee ID column and the new columns/values you want entered for each existing employee.

The screenshot shows a web interface for managing employee data. At the top, the file name 'Example Employee File.xlsx01222020_162842' is displayed. Below it, there are tabs for 'Hierarchies', 'Employees' (which is highlighted with a red box), and 'Columns'. A dark header bar reads 'Employees and Their Attributes'. Below this, there is a 'Bulk Actions' dropdown menu. A pagination bar shows '1/10' pages, '10' items per page, and a total of '99' items. A table with three columns is visible: 'EMPLOYEE ID', 'NAME', and 'EMAIL'. The table contains two rows of data:

EMPLOYEE ID	NAME	EMAIL
LL28361	Albert Dorsey	lapislazuli.LL28361@modernsurvey.com
LL28715	Donna Rodriguez	lapislazuli.LL28715@modernsurvey.com

On the right side, an 'Uploads' menu is open, showing options: 'UPLOAD', 'New Employees', and 'New Column(s) and value(s)'. A callout box points to the 'Uploads' menu with the text: 'Uploads is only used to ADD new data, not change or remove existing data.'

Bulk Edits | Columns

View column details.

Columns section is a pivot table, where you can see all demographic options and their counts listed under a column in file.

Column Definitions:

- **Has A Value:** Number of rows that have data
- **Empty Rows:** Number of rows missing data
- **Matched Values:** Number of rows have values that are the same
- **Unique Values:** Number of rows that have unique values

Matched Values + Unique (Unmatched) Values = Has A Value

Example Employee File.xlsx01222020_1628

Hierarchies Employees **Columns**

Columns and Column Data

29

COLUMN	HAS A VALUE	EMPTY ROWS	MATCHED VALUES	UNIQUE VALUES
EMPLOYEE ID	99	0	0	99
Full Name	99	0	0	99
EMAIL ADDRESS	98	1	0	98
SUPERVISOR ID	98	1	98	0
SUPERVISOR NAME	98	1	35	63
^ Expand to see details	99	0	99	0

2

VALUE	COUNT
No	95
Yes	4

SUPERVISORY ORG ID	99	0	34	65
--------------------	----	---	----	----

Change Log

View the edits in the hierarchy.

- Use the **Change Log** to see what changes have been made to the employee file that affect the hierarchy.

Overall Hierarchy

Total Employees
98

Direct Report Breakdown

16	Natalie Parr
15	Donna Rodrigue
15	Lauren McGrath
15	Trevor Oliver
12	Kara Lyons
0	Blake McDonald
0	Cameron Quinn

Levels: 3
Open Positions: 0
Blank Titles: 2
Unparented Employees: 0
Change Log:

Change Log

Columns (3) Filters (0) Search Table

CHANGE	TYPE	DATE
Christina Harris moved under by (1 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (2 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (3 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (4 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (5 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (6 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (7 of 7)	Hris Update	Jan 22, 2020 at 11:19 am UTC
Christina Harris moved under by (1 of 5)	Hris Update	Jan 22, 2020 at 11:15 am UTC

Click Icon

View Changes

Structure Only Hierarchy

- Create hierarchies using a hierarchy file

Structure Only Hierarchy

You can build hierarchies that are structure based if you do not have an employee file.

- These hierarchies are created from the Home/Hierarchy List page

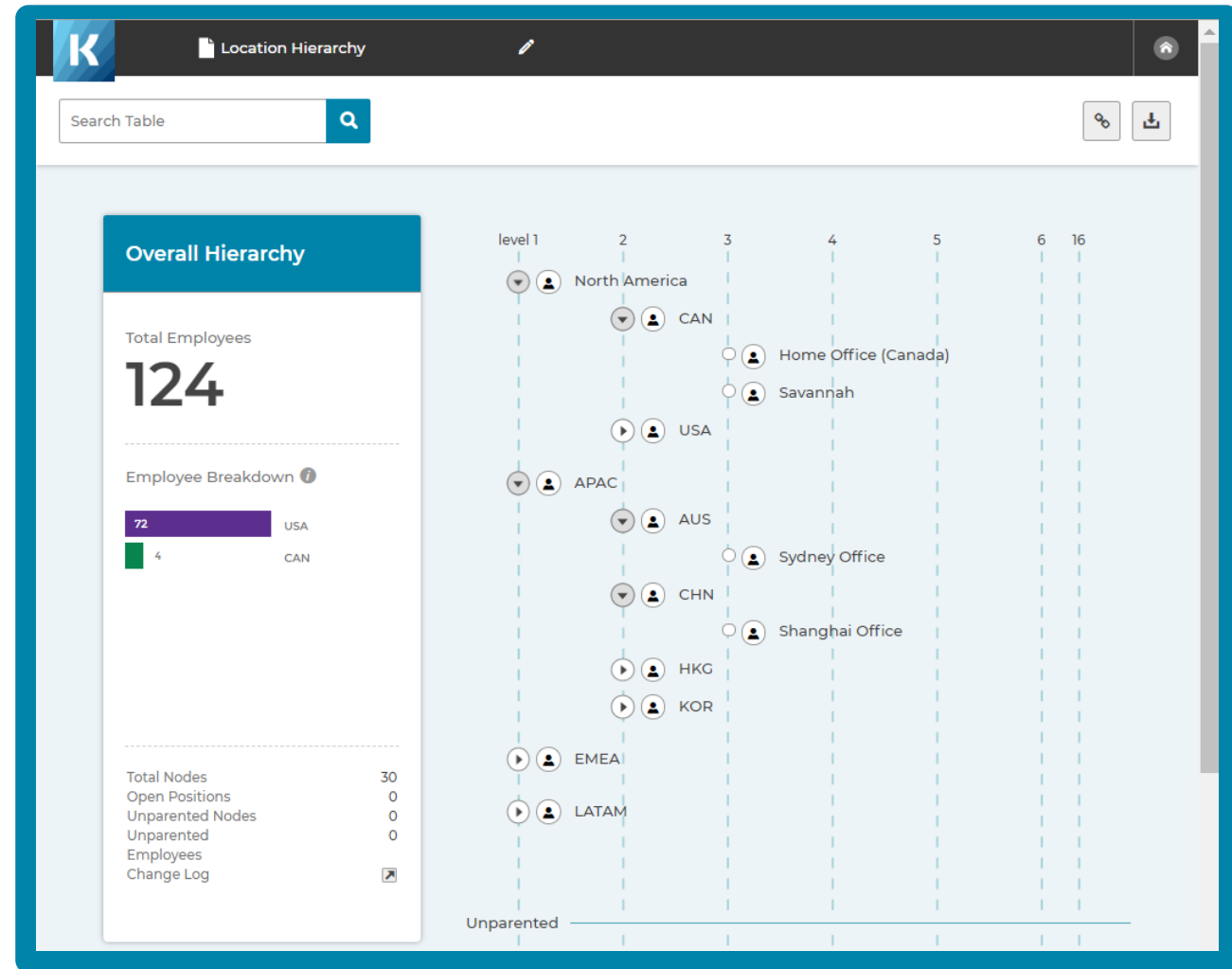
The screenshot shows the Kincentric Org Manager interface. The top navigation bar includes the Kincentric logo and the text 'A Spencer Stuart Company'. The main header area displays 'ORG MANAGER' and a user greeting: 'Welcome, ModernQA-HollyHolmes@modernsurvey.com'. A left-hand navigation menu is open, showing 'Hierarchy' as the selected section, with sub-items 'Hierarchy List' and 'Employee File'. The main content area is titled 'Hierarchy List' and features a table of hierarchy entries. A green 'Upload Hierarchy' button is located in the top right corner of the content area. A callout box points to this button with the text: 'Use when you have a hierarchy file (Not an employee file)'. A red arrow points from the 'Hierarchy' menu item to the 'Hierarchy List' page.

NAME ▾	LAST SAVED ▾	
Location Hierarchy (View Hris Source)	Jun 2, 2020 at 9:13 am CDT	Download Delete
Careys Test (View Hris Source)	Jun 1, 2020 at 12:11 pm CDT	Download Delete
Structure Only File - Manager Hierarchy (View Hris Source)	Jun 1, 2020 at 12:05 pm CDT	Download Delete
Manager Hierarchy (View Hris Source)	Jun 1, 2020 at 11:43 am CDT	Download Delete
Manager Hierarchy B (View Hris Source)	May 7, 2020 at 5:01 pm CDT	Download Delete

Structure Only | Example

A Structure Only hierarchy is usually used to create hierarchies such as Location, Business Unit, Function or Hybrid structures

- These types of structures normally do not have employee data
- You cannot edit the information once uploaded; the file should be in its final state before uploading
- You will build the structure by selecting the levels from top to bottom
- You can have up to 16 levels in the structure



Structure Only | File Example

A Structure Only file should contain the levels to build the structure and contain the following information:

1. Parent ID
2. ID of reporting level
3. Level Name
4. Levels
 - Each level should contain the full reporting structure

	A	B	C	D	E	F	G	H
1	Parent ID	Department ID	Department Name	Level1	Level2	Level3	Level4	Level5
2		6000	Company Overall	Company				
3	6000	6002	Accounting	Company	Accounting			
4	6002	6003	Payroll	Company	Accounting	Payroll		
5	6002	6005	Procurement	Company	Accounting	Procurement		
6	6002	6006	Tax	Company	Accounting	Tax		
7	6002	6008	Treasury	Company	Accounting	Treasury		
8	6000	6009	Administration	Company	Administration			
9	6000	6011	Complaints	Company	Complaints			
10	6011	6012	Complaints Team 1	Company	Complaints	Complaints Team 1		
26	6035	6036	Operations	Company	IT Operations	Operations		
27	6036	6038	Operations Team 1	Company	IT Operations	Operations	Operations Team 1	
28	6036	6039	Operations Team 2	Company	IT Operations	Operations	Operations Team 2	
29	6039	6041	Operations Team 2A	Company	IT Operations		Operations Team 2	Operations Team 2A
30	6039	6042	Operations Team 2B	Company	IT Operations		Operations Team 2	Operations Team 2B
31	6039	6044	Operations Team 2C	Company	IT Operations		Operations Team 2	Operations Team 2C
32	6039	6045	Operations Team 2D	Company	IT Operations		Operations Team 2	Operations Team 2D

Previous levels should not be empty

Structure Only | File Upload

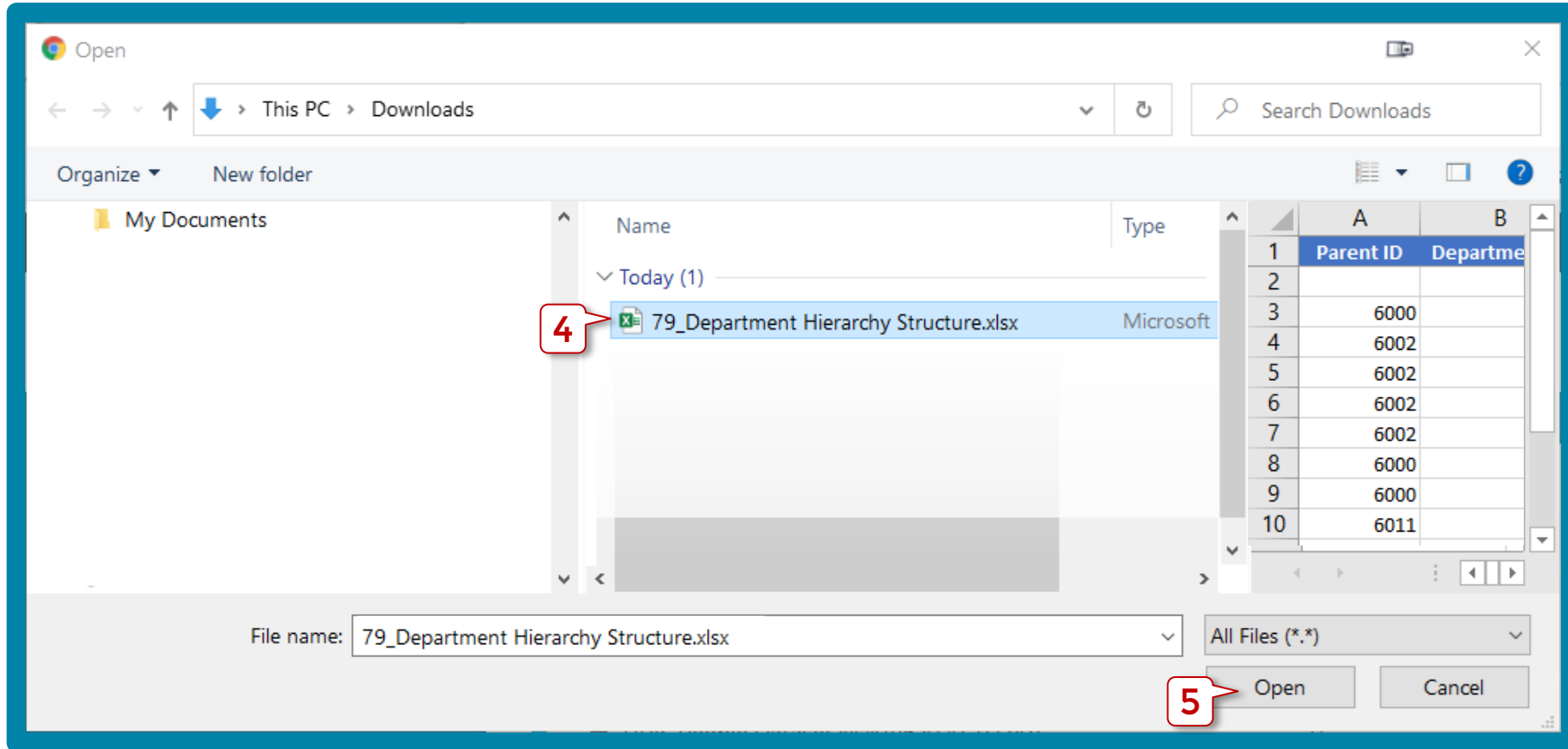
1. Click the **Navigation** icon in the top left side of the page
2. Click: **Hierarchy List**
3. Click: **Upload Hierarchy**

The screenshot displays the Kincentric Org Manager interface. At the top, the Kincentric logo and 'A Spencer Stuart Company' are visible. Below this, the 'ORG MANAGER' logo and 'Absolutely Gorgeous Demo' are shown. A navigation menu on the left contains 'Hierarchy' and 'Employee Files'. The main content area is titled 'Hierarchy List' and features a table with two entries: 'Node Structure' and 'Manager Structure'. A green 'Upload Hierarchy' button is located in the top right corner of the main content area. Three red callout boxes with numbers 1, 2, and 3 point to the navigation menu icon, the 'Hierarchy List' menu item, and the 'Upload Hierarchy' button, respectively.

NAME ▾	LAST SAVED ▾	
Node Structure	May 7, 2020 at 1:42 pm CDT	Download Delete
Manager Structure	May 7, 2020 at 12:56 pm CDT	Download Delete

Structure Only | File Upload

4. Select the **File** from your computer
5. Click: **Open**



Structure Only | File Upload

6. Structure only file: Turn the toggle **On**
7. Click: **Verify and Complete Upload**

Verify Common Columns

We need to do a data validation for certain columns that are common in all Employee files. Please review the columns we identified as a match below. If a column doesn't match, please select the column that does from the dropdown.

This column represents... Structure only file

...the unique ID of an employee

First and last name column Single name column

...the first name of an employee

Can be empty

...the last name of an employee

Structure Only | Build Hierarchy

Generate New Hierarchy

1. Click the **Non-Managerial Hierarchy** card

The screenshot shows a web interface titled "Generate New Hierarchy". At the top, there is a dark grey bar with the text "Hierarchy Type". Below this bar, a instruction reads: "Choose the hierarchy type you want to generate, then identify the columns needed to generate the hierarchy." In the center, there is a light blue card titled "Non-Managerial Hierarchy". A red callout bubble with the number "1" points to the card title. Below the title, the card contains the text: "This could be location, function, business unit or a hybrid combination." The entire interface is enclosed in a blue border.

Structure Only Hierarchy

- Hierarchy Name:** Enter a detailed name
- Type:** Select the type of hierarchy you are creating
 - Location
 - Function
 - Business Unit
 - Hybrid
 - Other
- Top Level:** Select the first level in the structure
- Add Level:** Click to add more levels to the structure. You can add up to 16 levels.
- Click: **Finish**
- Review any **warnings** on the page. Use the **info icon** to see the warning details
- Click: **Finish and ignore warnings**

Hierarchy Name Make sure this name accurately describe the type and purpose of the hierarchy

Department Hierarchy **2**

Type Select non-managerial hierarchy type (each type can be used one time per employee file)

Business Unit **3**

Levels

Top Level Select column from the dropdown below that is the **top level** of your hierarchy

Level1 **4**

1

VALUE	EMPLOYEES	
Company	143	

Level 2 Select column from the dropdown below that is the **2nd level** of your hierarchy

21 **7** Level2

18

VALUE	EMPLOYEES	
No Value	1	
Accounting	5	Edit Values

+ Add Level **5**

Finish and ignore warnings **6 & 8**

Structure Only Hierarchy


Use the Edit Icon to update the values if needed

1. Click the **Edit Icon** for the values you want to update
2. Enter the **New Value**
3. Click: **Change Value**

Top Level Select column from the dropdown below that is the **top level** of your hierarchy

STATE


Total Column Values 26


VALUE	EMPLOYEES	
CA	10	
CO	1	

Change Value

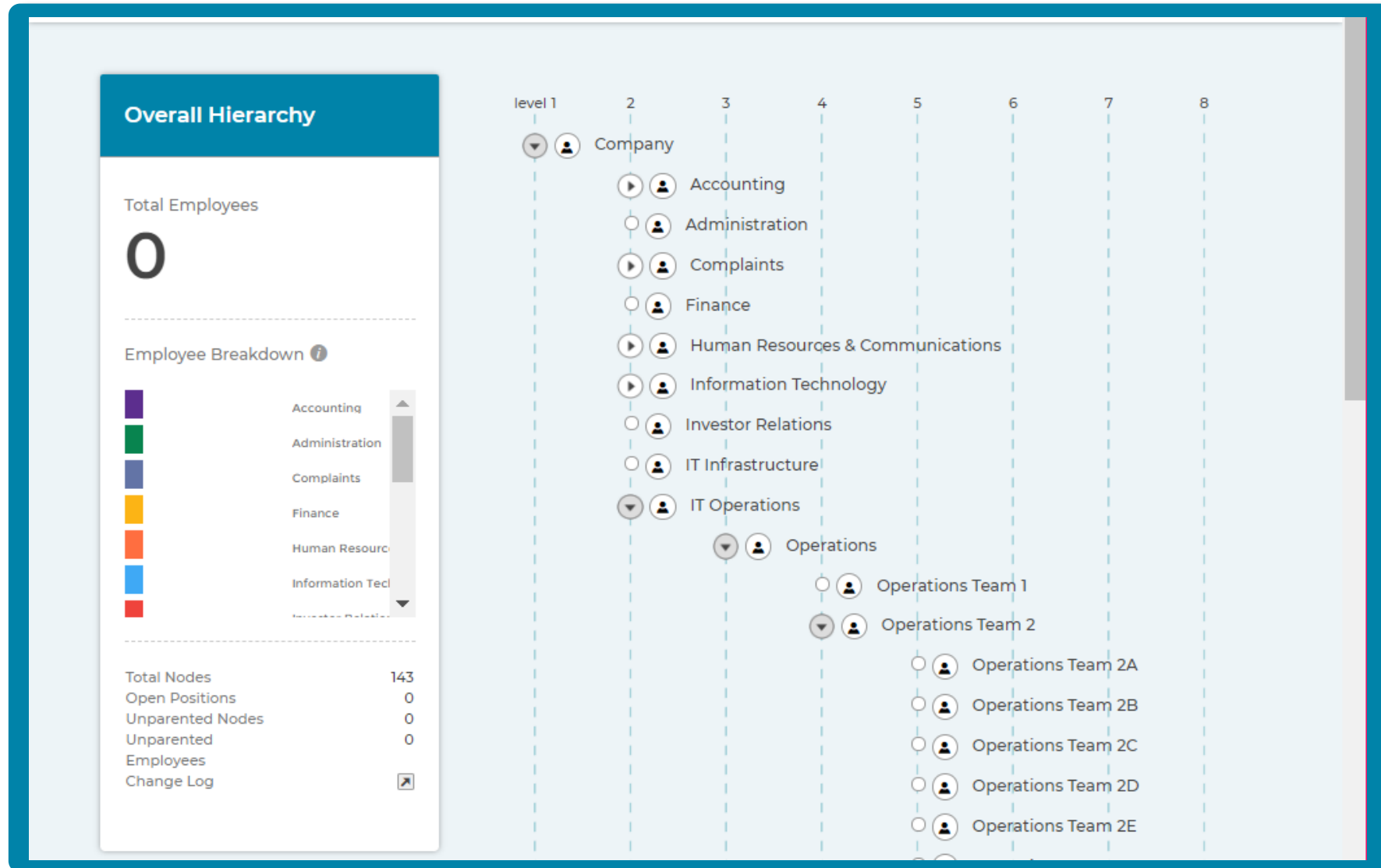
By changing this value, it will change the attribute value for **10 employees**

Old Value CA

New Value California 

Cancel Change Value 

Structure Only Hierarchy | Results



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A Spencer Stuart Company