

Company, Org, System, Team Configuration and User Management

01/18/2024 9:57 am CST



Some of the features and functions described in this article are limited by P2ANav user role.

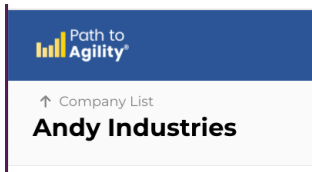
Overview

The Companies feature in P2ANav allows the creation and management of companies, organizations, systems, and teams. It also provides access to manage assessment hosts and P2A users.

Key User Interface Elements

List of Companies

- Click the **Company List** link at the top of the main navigation panel



- You'll then see an alphabetically sorted list of companies that you have admin access to.
- There is also a **Company Search** function available



Company Search

Company Dashboard

Click on a company in the list and you'll see the company overview dashboard.

At the top of the company dashboard are company configurations:

Andy Industries   

Company Settings

Clicking the **gear icon** will take you to the setup screen.



Note: if you click on an organization name in the company overview dashboard, you'll be taken to the [Map view](#) for that org.

[← Back to company overview](#)

Set Up: Andy Industries

Add Organization

Organization: Busy Beavers

New system

System: BB System [Show Teams ▾](#)

ORG Busy Beavers

ORG Odd Ducks

- The setup screen allows you to add a **new organization** to the company.
 - Provide a name for the new org, then click submit

Name New Org

[Cancel](#) [Submit](#)

- **Click on an existing organization** in the setup screen to **add systems and teams**
 - Click **New System**, provide name, and click the check mark

Organization: Odd Ducks

System: ✓ ✕

System: Paddling System 1 [Show Teams ▾](#)

- Similarly, you can **add teams** to an existing system.
 - Click show teams
 - Click New Team, provide a team name, and then click the check mark

System: Paddling System 1 [Hide Teams ▲](#)

Team: ✓ ✕

Team: Flock 1

- For Organizations, Systems, and Teams you can access additional functions:
 - **Edit**: Change the name
 - **Move** (Systems and Teams only): Move to a different location, eg. org or system. You can



optionally choose to copy.

- **Delete:** Can not be undone! Removes all associated data.
- **Manage Members:** Allows assigning of a host for Agile Capability assessments for that level





Users

From the Company Dashboard, click the **user icon**

- You can then add and import users.
 - **Add one at a time:** You'll need user names and email addresses.
 - New users will be assigned Assessment Admin
 - **Import:** Upload a .csv file
 - Fields: Full Name, Email address
 - Imported users will be assigned Assessment Admin



New users will receive an automatic email invitation from hello@p2anav.com. The subject line will be "Welcome to Path to Agility Navigator!" The email will have a link for the user to complete setup, including setting their password

- From the user screen, you can also access:    
 - **Resend** a welcome email
 - **View user log:** Shows details by action, types, description and date
 - **Change user role**
 - **Basic User:** Lowest level user, who can see all data and run polls, but not publish assessments, delete assessments, or administer users.
 - **Assessment Admin:** Middle level user, who can see all data, run polls, publish assessments, and delete assessments, but not administer users.
 - **Company Admin:** Highest level user, who can see all data, administer assessments, and administer users.
 - **Delete user:** Cannot be undone.



It is not currently possible to edit a user's name or email address. To make changes or corrections, delete the existing user and add a new one to replace them.

Delete

From the Company Dashboard, you can delete the company, all of its organizations, systems, and teams. This cannot be undone.

Company Dashboard filters

When viewing the company dashboard, you can adjust what data is displayed on the company overview map by using the two filters: Organizations and Date Range:

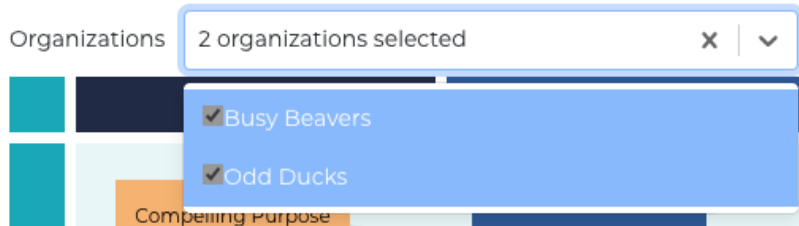
Company Dashboard

Organizations 2 organizations selected x | v

Date Range 05/08/2023 - 08/08/2023 v

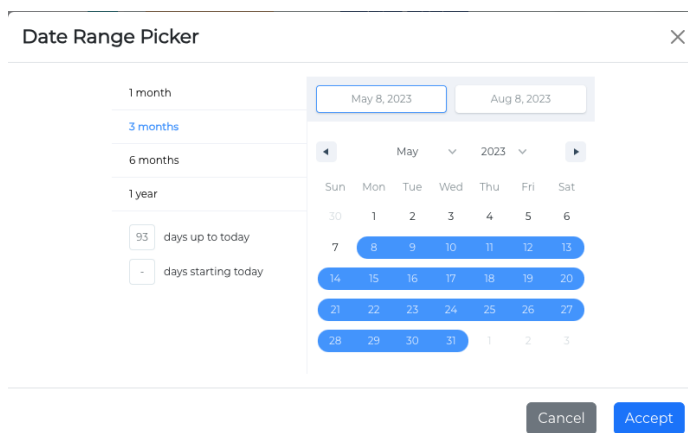
Organizations

Use the drop-down to check the organizations to be included:



Date Range

Use the date range picker to select assessment data to be included:



Average Completeness of Agile Outcomes by Org and Stage

The settings for the organization(s) selected and the date range will be used on the company dashboard map display, as well as in the average completeness summary table.

Average Completeness of Agile Outcomes by Org and Stage

Organization	Align	Learn	Predict	Accelerate	Adapt
Busy Beavers	29%	3%	25%	-	-
Odd Ducks	-	50%	-	-	0%
All Organizations (Average)	29%	27%	25%	-	0%



Note: Due to software updates over time, there may be variations between screenshots, icons, buttons, and navigational elements in our online support documents and the Path the Agility Navigator platform
