Company, Org, System, Team Configuration and User Management

04/22/2025 10:45 am CDT

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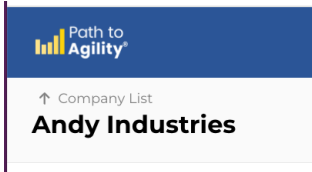
Overview

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.

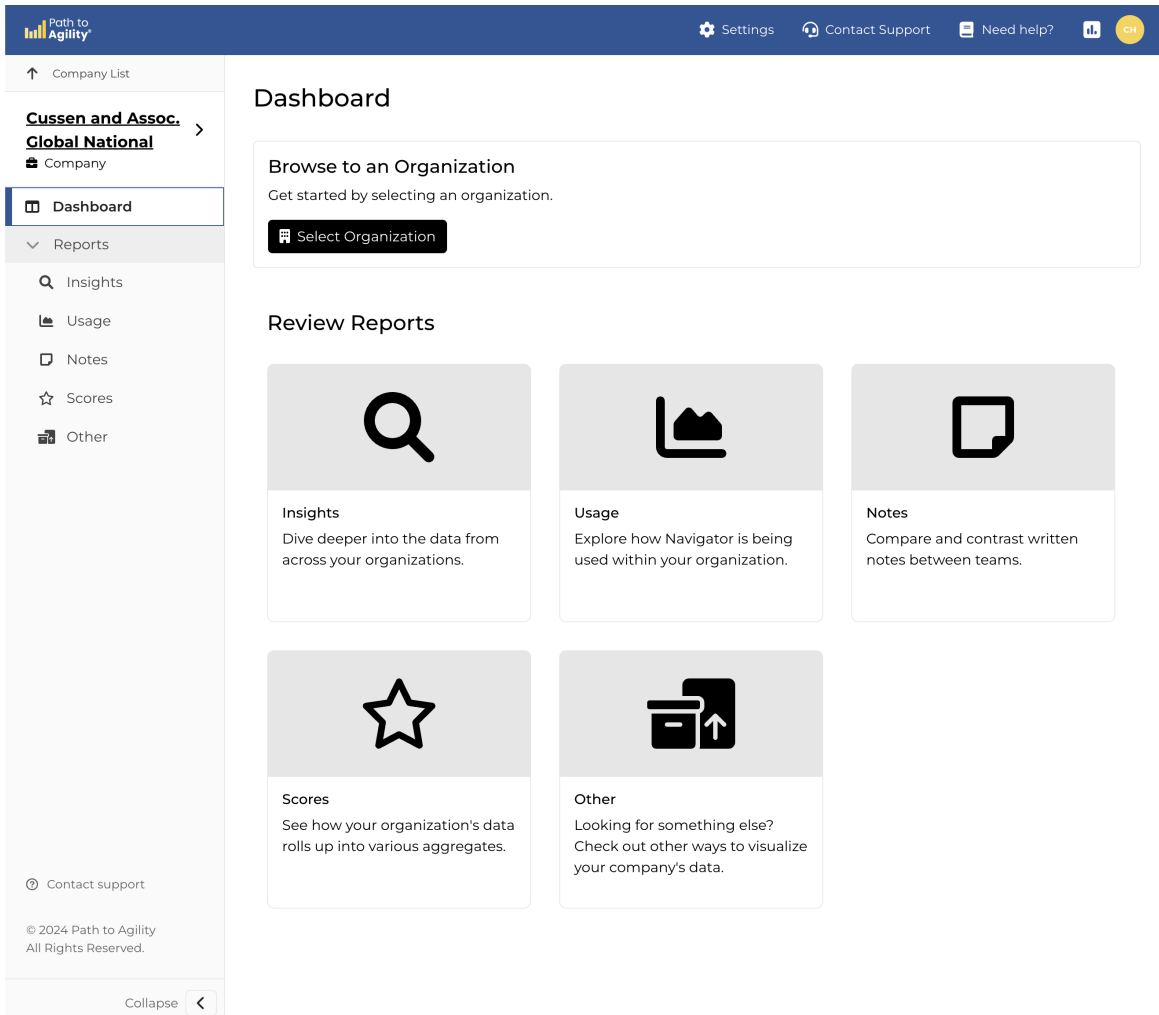## Key User Interface Elements

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 access to.

Company Dashboard

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

Visit Navigating to Your Organization for more information about selecting an organization from this page.
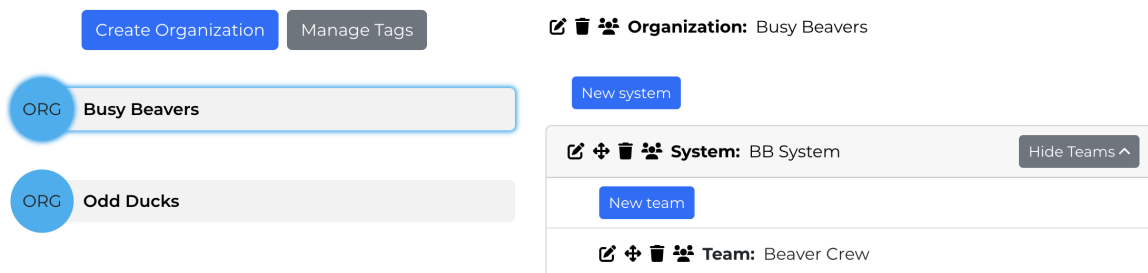
Company Settings

At the top of the page are company configurations: **⚙ Settings**

Manage Hierarchy
Configure how the company is structured from organization to system to team.

Manage Company Settings
Modify company name, package, and billing

Manage Users
Add and remove users from the company, as well as manage roles.

Customize Language
Customize the language of Path to Agility to better suit your organization.

Export Data as CSV
Retrieve all assessment data from the entire company.

Manage Hierarchy

Clicking the **"Manage Hierarchy"** card will take you to the company hierarchy setup screen where you can move/add/edit your company's organizations, systems and teams. Only Company Administrators have the ability to create, delete, archive or edit an organization. If you do not have this ability and believe you should, please reach out to your admin team.

Andy Industries: Manage Hierarchy

- 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

Org Name

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:** ACME

System: ACME system   ✓ ✕

  - 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

☑ 🗑 🗄 👥 **Organization:** ACME

New system

☑ ✛ 🗑 🗄 👥 **System:** ACME system   Hide Teams ⌃

New team

- For Organizations, Systems, and Teams you can access additional functions: ☑ ✛ 🗑 👥
  - **Edit:** Change the name
  - **Move:** (Company Administrators only): Move to a different location, eg. org or system. You can optionally choose to copy. When you move a system/team you have an option to move all assessment data, keep all assessment data where it currently is, or move only the unpublished assessment data (shown below). This feature therefore enables you to move a system or team without changing any of your baseline data.

    🔘 Keep published assessment data in current organization, move unpublished assessment data to new organization (**Recommended**)
    ⚪ Keep all assessment data in current organization
    ⚪ Move all assessment data to new organization

  - **Delete:** *Can not be undone!* Removes all associated data.
  - **Archive:** Archive retains the historical data while removing the node from default navigation. Essentially, an archived node and its data is still accessible but will be excluded from actions by default.
    - Navigation will now include an option for archived organizations

      Agile Velocity   ‹
      🏢 Company

      ▢ Dashboard

      ⌄ Reports

      Agile Velocity

      Active organizations (1) ⌄

      Agile Velocity

      Archived organizations (0) ⌄

    - Filters where nodes are listed for selection (i.e. reports) provide the option to

include/exclude data from archived nodes in the results

Select Orgs / Systems

5 teams selected

Q Search

Select all below   Clear sele

☑ Include archived

☑ 💼 Agile Velocity
   ☑ 🏢 Agile Velocity

- ○ **Manage Members:** Allows assigning of a host for Agile Capabilityassessments for that level

For larger enterprises exploring additional ways to segment their team hierarchy, ourTeam Tagging may be of interest.

Manage Users

From the Company Settings, click the**"Manage Users"**card
- You can then add and import users.
  - ○ **Add one at a time**: You'll need user names and email addresses.
    - The default selection for new users is Basic User, but the role they will be assigned may be changed using the Role dropdown
  - ○ **Import**: Upload a .csv file
    - Fields: Full Name, Email address
    - Imported users will be assigned Basic User

> ℹ 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**
    - **View Only:** Can see all data but cannot run polls, publish assessments, delete assessments, or administer users.
    - **Basic User:** Can see all data and run polls, but not publish assessments, delete assessments, or administer users.
    - **Assessment Admin**: Can see all data, run polls, publish assessments, and delete assessments, but not administer users.
    - **Company Admin**: 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,

Customize Language

If available, the Path to Agility language can be manually tailored to better fit your organization's needs. If you're interested in this feature, reach out to support@pathtoagility.com to learn more.

← Settings

Cussen and Assoc. Global National: Customize Language

| Agile Outcomes | Agile Capabilities | Acceptance Criteria |

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Name	Original Description	Custom Description
Compelling Purpose	The organization is aligned and motivated by a clear organizational purpose, vision, set of objectives, and a compelling purpose for change and improvement.	
Rollout Strategy	An Agile Leadership Team has been established and a transformation roadmap defined, taking into account new organization structure demands, top risks, and incremental rollout.	
Products Defined	Products are clearly defined, understood, and are serving as a driver for organizing the system and teams.	
Value Alignment	System of teams is organized around value to deliver work with minimal outside dependencies, tightly aligning the relationship between delivery and the customer/stakeholders.	
Team Formed	Teams know their stakeholders and how their work contributes to the larger goals (e.g. System and Organization), they have agreed on how they work together, and team roles are understood and filled.	
Action Enabled	The Agile Leadership Team is facilitating the overall transformation, resolving organizational impediments with urgency, and continuing to communicate the change vision, wins, and learnings. Measurable progress is being communicated and people are taking action.	
Team Empowerment	Leaders are shifting to team-based responsibility and performance over individual results by supporting team autonomy, building a continual learning and improvement culture, and demonstrating their own agile leadership in the ways they lead (communicate, behave, and think).	
Product Value Management	There is clear product management responsibility established and customers/ stakeholders are engaged partners in sequencing work along with ongoing evaluation of product success.	

Agile Outcome descriptions, Agile Capability descriptions, and Agile Capability acceptance criteria can be changed. Find the entry you would like to customize, and double click into the "Custom Description" or "Custom Acceptance Criteria" field to write in your new value.

If you'd like to clear the customization, simply clear out the contents of the field.

Export Data as CSV

All assessment data for the entire company can be exported to a CSV file using this option.