

# Company, Org, System, Team Configuration and User Management

08/15/2023 3:28 pm CDT



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

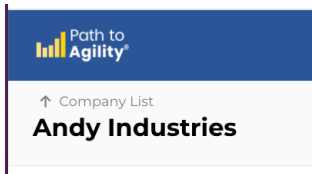
## Overview

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 admin access to.
- There is also a **Company Search** function available



### 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

For larger enterprises who would like additional ways to organization the various dimensions of their team hierarchy, our [Team Tagging](#) may be of interest.





## 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.
    - 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



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, 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:

### Filters

Organizations

Organization 1 and Organization 2

 Change Selection

Date Range

03/10/2024 - 06/10/2024

Submit →

### Organizations

Click **Change Selection** to modify which organizations' data is visible on the dashboard.

### Date Range

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

Date Range Picker ×

1 month

**3 months**

6 months

1 year

93 days up to today

- days starting today

May 8, 2023

Aug 8, 2023

May 2023

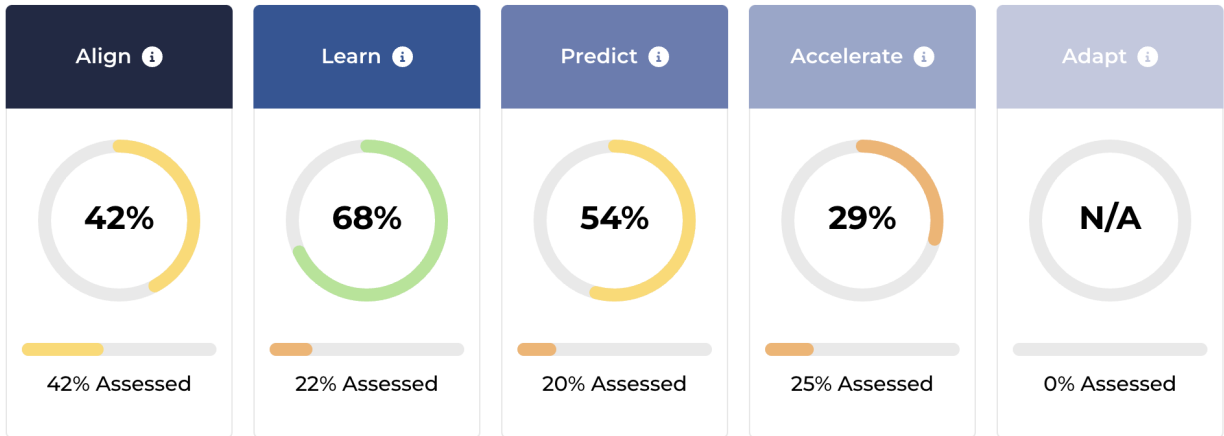
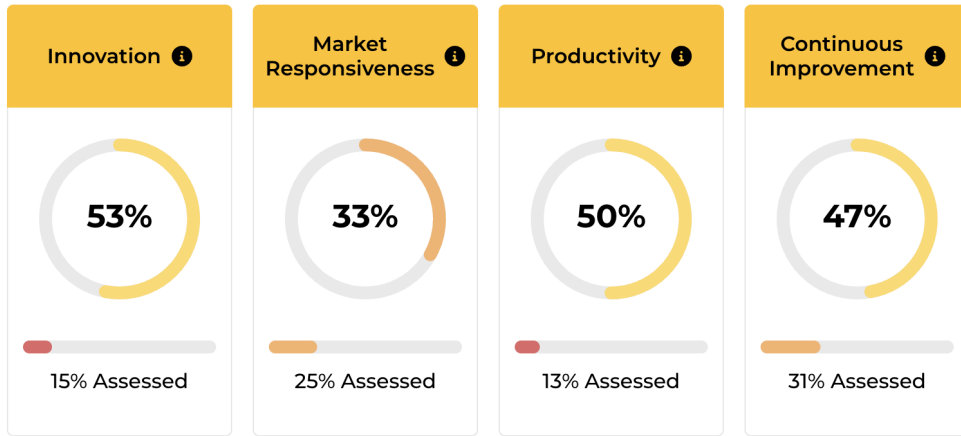
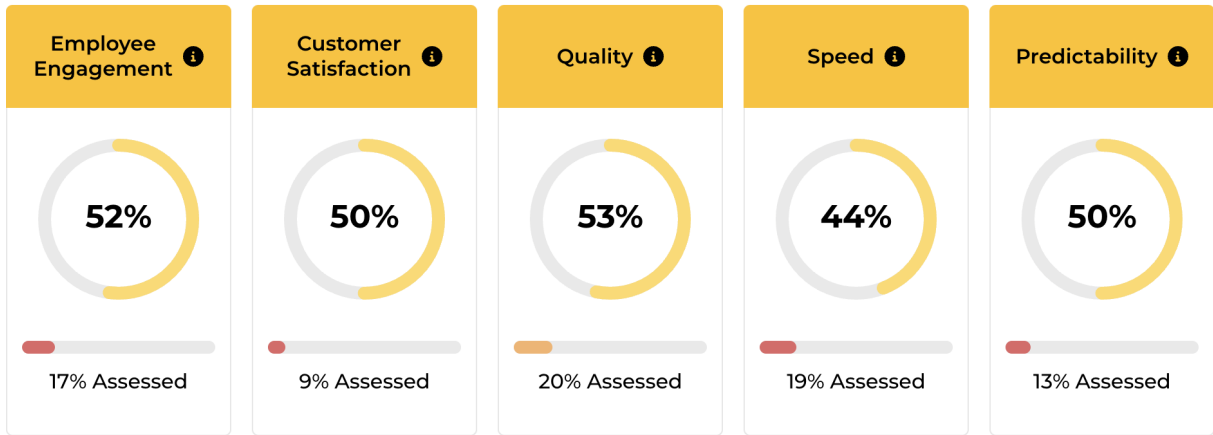
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Cancel Accept

The date range will default to the previous 3 months from today.

### Business Outcomes Progress & Stages Progress

Based on the filter settings (the organization(s) selected and the date range), the progress in the various Path to Agility Business Outcomes and Stages is visible. The larger number inside the progress circle is the raw score, while the Assessed percentage describes what percentage of the capabilities are assessed for each of the nodes within that Business Outcome or Stage.



### Detailed Data Breakdown

Under the Business Outcome and Stage visualizations, there is an expandable accordion where you can explore the numbers in greater detail. Similar to above, CS is the raw capability score for that level and stage, while CA is the percentage of the capabilities that have been assessed in that stage for all of the nodes in that level.

### Level and Stage Average Capability Scores

This table displays an analysis by stage and level of capability scores and capabilities assessed. Having visibility into the average scores in combination with the percentage of assessments being taken, provides insight into overall engagement within your company.

Legend:

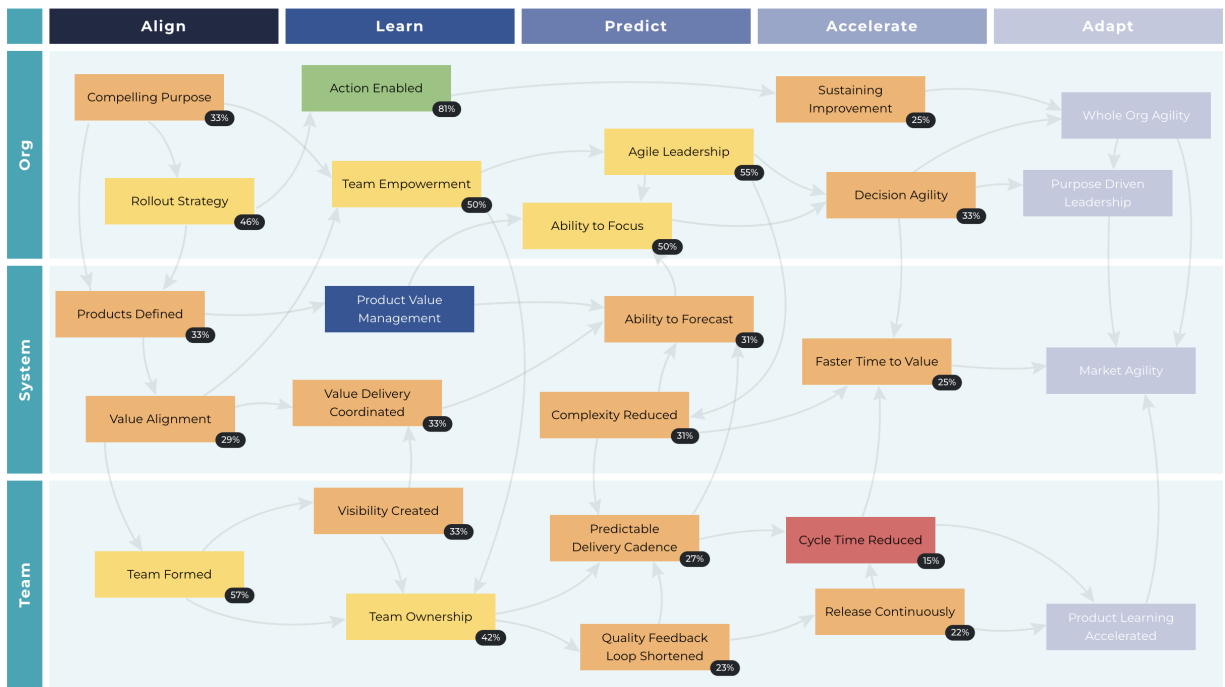
- CS: Capability Score - Average of all capability scores captured during the provided date range grouped by stage and level.
- CA: Capabilities Assessed - Percent of Agile Capabilities assessed

For instance, given 5 capabilities in a stage, with 3 total teams, and 4 total capabilities assessed in the date range specified, would result in 27% (4 capabilities assessed / (3 teams × 5 assessable capabilities)).

Level	Align		Learn		Predict		Accelerate		Adapt		All Stages	
	CS	CA	CS	CA	CS	CA	CS	CA	CS	CA	CS	CA
Organization	42%	42%	68%	22%	54%	20%	29%	25%	-	0%	48%	22%
System	31%	50%	33%	11%	31%	25%	25%	25%	-	0%	30%	23%
Team	57%	35%	40%	25%	25%	30%	18%	25%	-	0%	35%	23%
<b>Aggregate</b>	43%	43%	47%	20%	37%	25%	24%	25%	-	0%	38%	23%

## Company Map

Finally, there is a map that displays data for the organizations selected within the date range based on the filters at the top of the Company Dashboard. Agile Outcomes may be clicked to view the capabilities inside of them, and they are colored based on their score (the black pill-shaped icon in the bottom right of each Agile Outcome). The Map highlights the dependency mapping between each of the Agile Outcomes (and thus Agile Capabilities) within Path to Agility.



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