

OrgPublisher Position Types



OrgPublisher 10 Training

Copyright 2002 – 2011 All Rights Reserved by Aquire

OrgPublisher™, OrgPublisher Premier™, Unifi™, Mobile OrgPublisher™, and Pocket OrgPublisher™ are trademarks of Aquire in the United States and other countries.

Microsoft®, Windows®, Internet Explorer, Pocket PC 2002 platform, and ActiveSync®, are either registered trademarks or trademarks of Microsoft Corporation in the United States and other countries.

Netscape® and the Netscape N and Ship's Wheel logos are registered trademarks of Netscape Communications Corporation in the United States and other countries.

Blackberry™, RIM850™, RIM857™, RIM950™, and RIM957™ are either registered trademarks or trademarks of Research in Motion Limited (RIM) in Canada and other countries.

Palm™, Palm OS®, and HotSync® are either registered trademarks or trademarks of Palm, Inc. in the United States and other countries.

JAWS® for Windows is a registered trademark of Freedom Scientific in the United States and other countries.

SAP® and mySAP™ are trademarks or registered trademarks of SAP AG in Germany and in several other countries all over the world.



Table of Contents

- 1 What is a Position Type? 1
- 2 Record Type Field Refresher 2
- 3 How Can I See the Position Types in My Data? 3
 - 3.1 Use the Summary View 3
 - 3.2 Click on a Person’s Name in the Chart..... 3
- 4 Defining Position Types..... 4

1 What is a Position Type?

Your data feed can pass into OrgPublisher a value that categorizes the record. This is a Record Type. As noted in the *Before You Begin* manual, the Record Type is the 4th field of information when you follow the order requested by OrgPublisher. If you map your fields, it is the Record Type field.

The Record Type is used to define a Position Type in OrgPublisher. There are several attributes assigned in the definition. They are:

- Position Type name
- Count
- Priority
- Record Type (Typically, passed into OrgPublisher with data)
- Group
- Box Type

Once a Position Type is defined, there are several ways to use a Position Type for formatting, display, and reporting in OrgPublisher. For example, you can:

- Format boxes based on Position Type
- Get counts of records by Position Type
- Search on people who are coded as a specific Position Type
- Summarize numeric data based on Position Type
- Determine if data should or should not be displayed in a box based on Position Type
- Determine if the box should or should not be displayed based on Position Type

2 Record Type Field Refresher

The Record Type field is not a required field, but if you choose to categorize chart boxes and format them uniquely, providing this information simplifies the process.

In the table below, you will see listed the codes OrgPublisher is familiar with. You can also provide your own unique values to this field to expand the formatting options.

Please Note:

1. If a record type is not passed in with the data, OrgPublisher will "code" all records as Employees (E).
2. Open Positions are created when the data is a Position-to-Position hierarchy and a position is unfilled (there is no name in the name field).

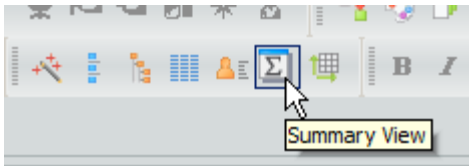
Field Number	Excel Column	Required	Field Name	Description
4	D	NO	Record Type	<p>This is the type of record, which if left blank, defaults to an Employee record type. You can also define custom record types by typing any alphanumeric characters other than those already used by OrgPublisher. You need to surround these characters with < > (for example <Vice President>). OrgPublisher's built-in record types are:</p> <p>M: Manager E: Employee A: Assistant I: Indirect Report (IM is an Indirect Report Manager) PR: Partner C: Contractor <SF>: Staff Function <SC>: Successor B: Box (Note: You may not insert a person in a "B" record type. It is typically used to display org units or departments only.)</p>

3 How Can I See the Position Types in My Data?

If you are unsure if a code has been passed in to define the Position Type, there is an easy way to check.

3.1 Use the Summary View

1. Open the Chart.
2. Click on the Summary View Button.



3. The Summary View (by default) opens with all Position Types listed and a count of records in that Position Type.

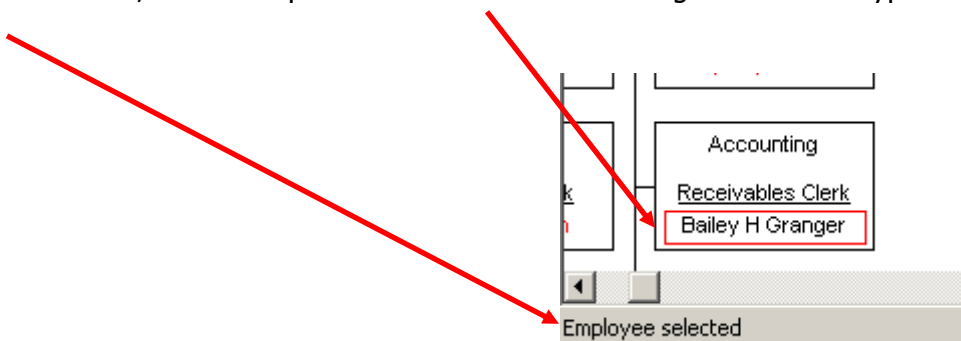
Position type	Include in Summary	Count
Manager	Yes	
Employee	Yes	195
Assistant	Yes	
Contractor	No	
Partner	Yes	
Staff Function	Yes	
Successor	No	
Indirect Report	No	
Total Head Count		195
Open position	Yes	13
Total Planned Head Count		208
Everyone		208

Please Note: Read the Summary View manual to learn more about using the Summary View.

4. Nearly all of the records passed in are set to the Employee Position Type.

3.2 Click on a Person's Name in the Chart

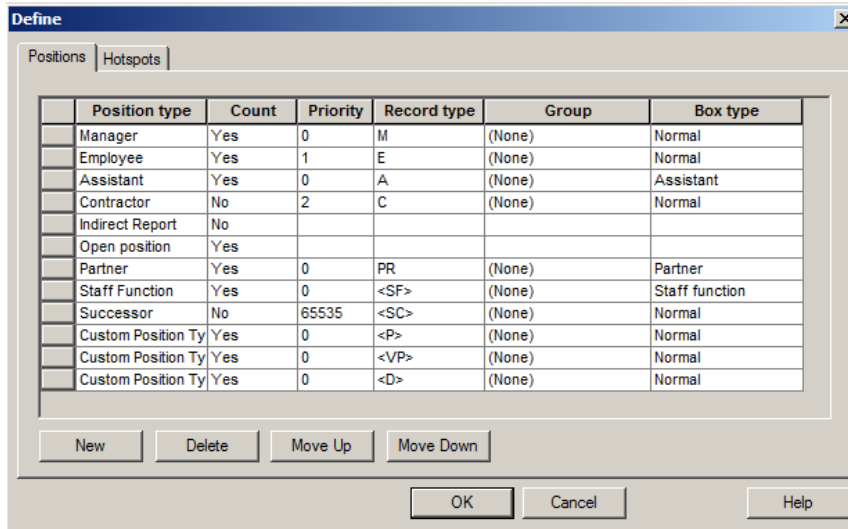
In View Mode, select the person's name to see the assigned Position Type in the status bar.



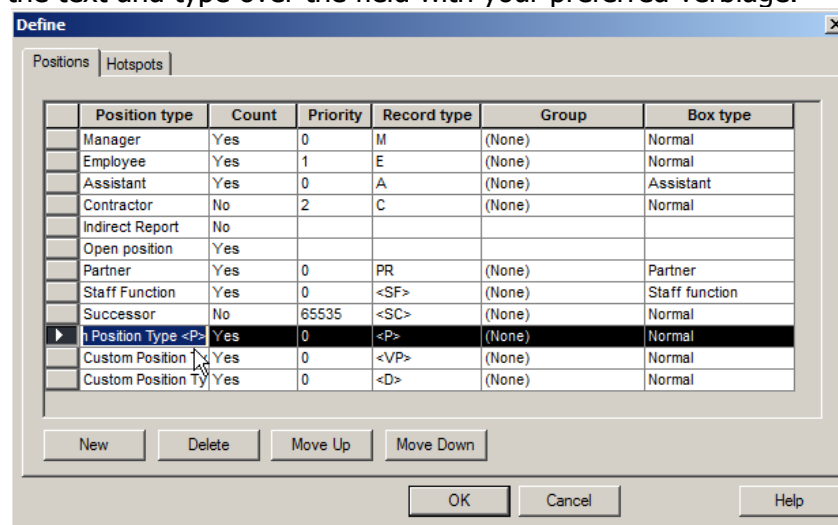
4 Defining Position Types

There are several attributes to a Position Type. The following steps describe the attribute, how to modify and change the attributes.

1. Click **Edit**, and then select **Define** from the menu.
2. The pre-defined Position Types are listed first. Any Custom Position Types are then listed.



- **Position type** is the definition or label of the record type.
 - Pre-defined Position Type labels cannot be changed with the exception of the **Open Position** label.
 - If the data feed contains a Custom Record Type, OrgPublisher assigns a default label, *Custom Position Type <yourvalue>*
 - To modify the label for an Open Position or Custom Position Type label, highlight the text and type over the field with your preferred verbiage.



Indirect Report	No				
Open position	Yes				
Partner	Yes	0	PR	(None)	Partner
Staff Function	Yes	0	<SF>	(None)	Staff function
Successor	No	65535	<SC>	(None)	Normal
President	Yes	0	<P>	(None)	Normal
Custom Position Ty	Yes	0	<VP>	(None)	Normal
Custom Position Ty	Yes	0	<D>	(None)	Normal

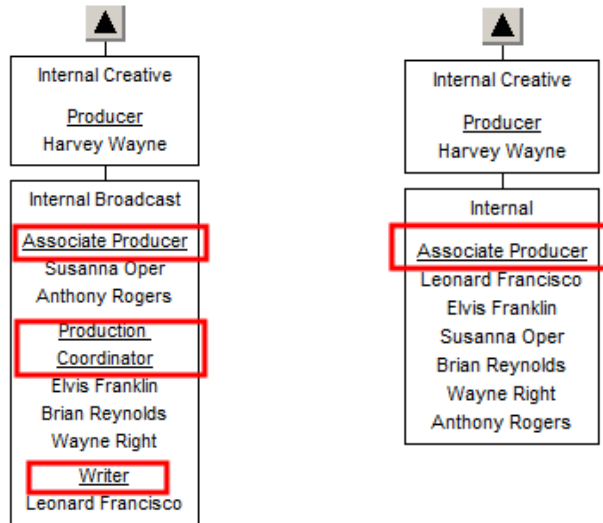
- **Count** indicates if a position type should be included in the automatic head count.

Please Note: The Summary View, by default, displays all Position Types, whether they are counted (as set by the chart administrator in the definition), and the count

Summary View		
Position type	Include in Summary	Count
Manager	Yes	38
Employee	Yes	98
Assistant	Yes	9
Contractor	No	
Partner	Yes	
Staff Function	Yes	
Successor	No	
Indirect Report	No	
Total Head Count		154
Open position	Yes	13
Total Planned Head Count		167
Everyone		208
President	Yes	1
Custom Position Type <VP>	Yes	3
Custom Position Type <D>	Yes	5

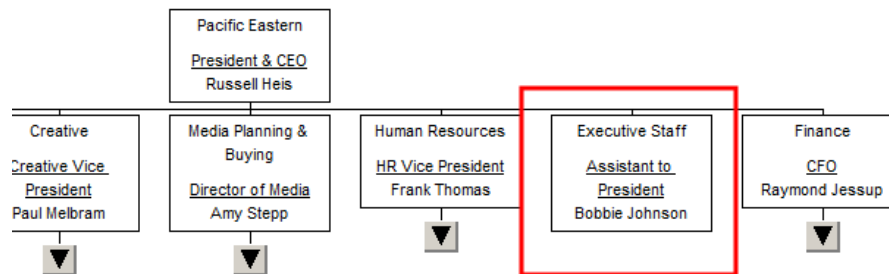
- **Priority** is used with the AutoBuild feature for Chart View display and with Print Preview:
 - AutoBuild allows you to determine if everyone has their own box, if employees are combined in a box below their manager, or combined in a box with their manager.
 - 0 Priority always remains in their own box.
 - 1, 2, etc. are sorted in a combined box based on priority – with 1s at the top of the box.

- **Please Note:** To display all Job Titles under a manager, a value must be provided in the data for the Job ID. If you do not have a Job ID, then pass the Job title in as the Job ID. The example on the left has the job id passed in. The one on the right does not.



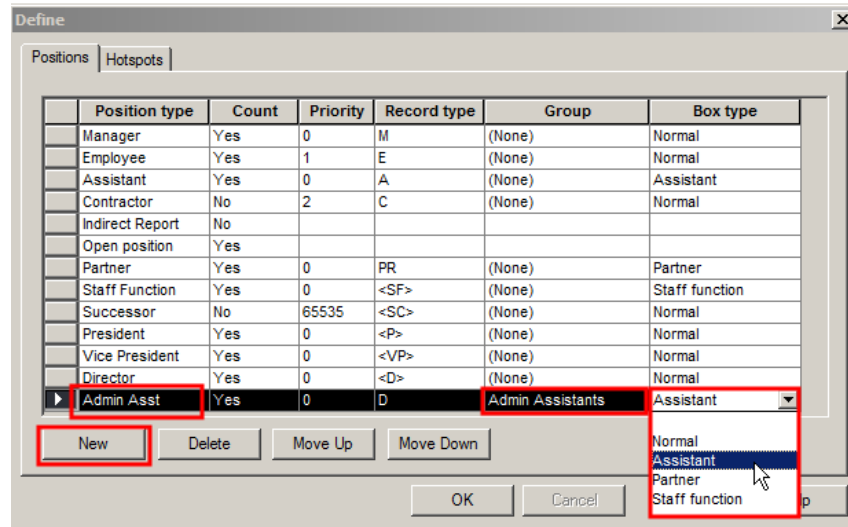
- **Record type** is the value passed in to categorize the record. OrgPublisher has several pre-defined codes (M, E, A, I, C, PR, <SF> and <SC>). You can also pass in your own codes to create a Custom Position type for your organization.
- **Group** is selected when *conditional formatting* is needed. Please see the *Search and Group* manual to learn more about creating Groups. In the example below, there are no Record Types passed in with the data.
 - Bobbie Johnson should be an Assistant in the chart

Pacific Eastern



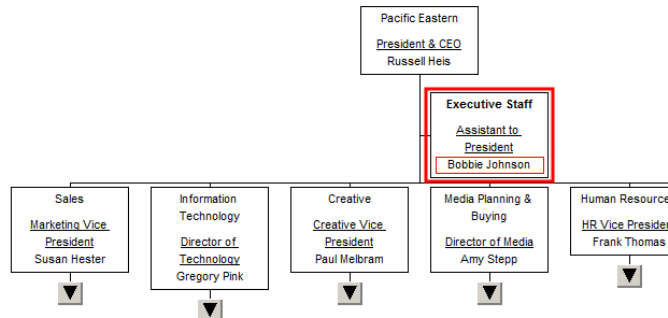
- Click **New** to get a new Position Type row
 - Type in the Position Type label.
 - Under Groups, select the desired group – This example uses the Admin Assistants group.
 - Select the Box Type of Assistant

- Click **OK**



- Bobbie Johnson now displays in the Assistant position type position

Pacific Eastern



Admin Asst selected | Levels shown: 2 | Shown head count: 8

- **Box type** determines how the box will be attached to report boxes in the Chart View. The 4 options are:
 - Normal
 - Assistant
 - Partner
 - Staff Function

Open position	Yes					
Partner	Yes	0	PR	(None)		Partner
Staff Function	Yes	0	<SF>	(None)		Staff function
Successor	No	65535	<SC>	(None)		Normal
President	Yes	0	<P>	(None)		Normal
Custom Position Ty	Yes	0	<VP>	(None)		Normal
Custom Position Ty	Yes	0	<D>	(None)		Assistant
						Staff function

New Delete Move Up Move Down

