

OrgPublisher (Premier Only) Levels and Span of Control



OrgPublisher 10 Training

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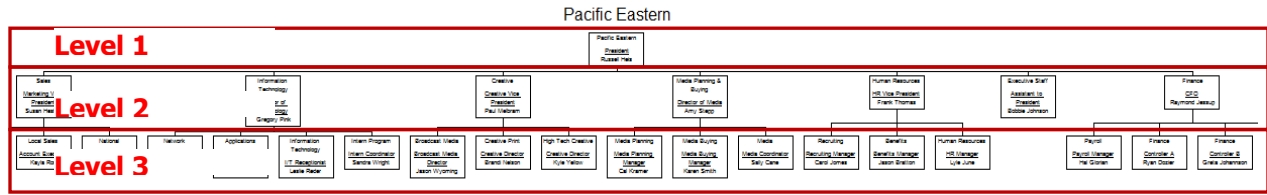
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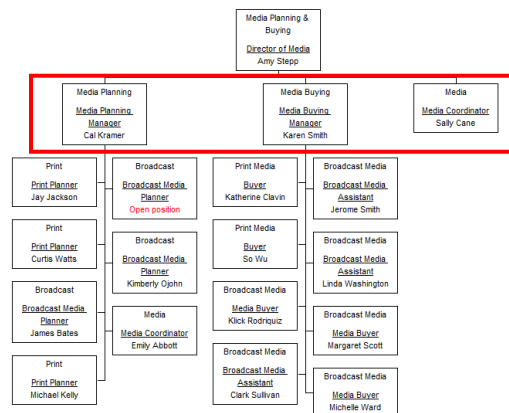
1 Levels and Span of Control

Level Defined



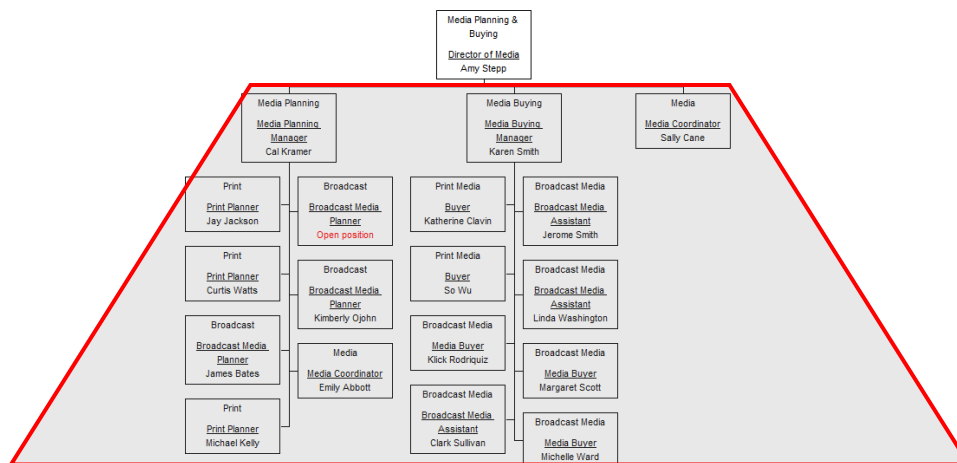
Span of Control / Direct Reports

Media Planning & Buying



Extended Span of Control / Hierarchy

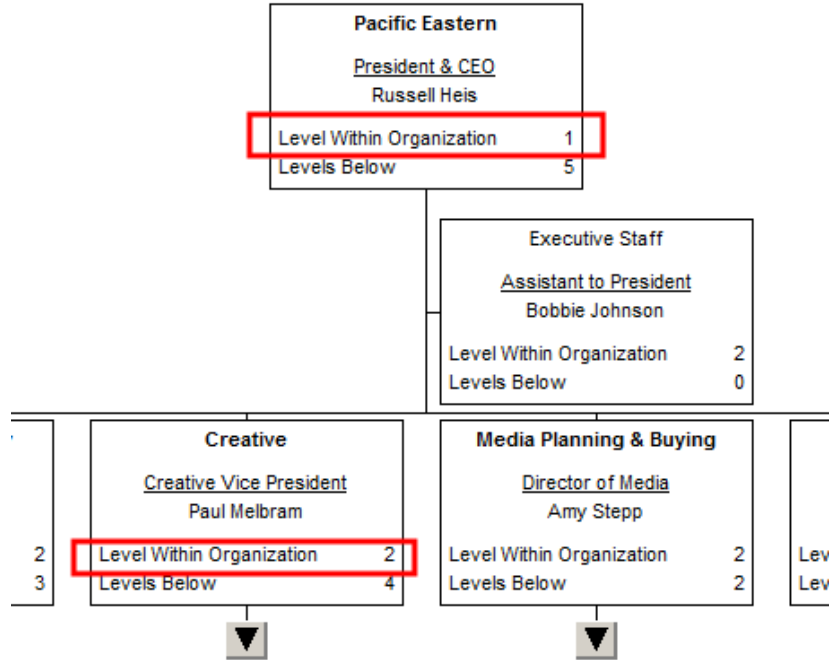
Media Planning & Buying



Please Note: Levels are relative to the top box in the chart. If data passed into the chart begins at a Vice President level, the Vice President will be marked as Level 1.

Top record in data source is the President

Pacific Eastern



Top record in the data source is a Vice President, Paul Melbram

Creative



2 Counts and Position Type Definitions

If Position Types are utilized in the chart data, Span of Control / Direct Report counts will follow the Count setting within the definition. In the Position Type Definition box below, Indirect Reports, Contractors, and Successor records would not be included in the Span of Control / Direct Report counts.

| Position type | Count | Priority | Record type | Group | Box type |
|-----------------|-------|----------|-------------|--------|----------------|
| Manager | Yes | 0 | M | (None) | Normal |
| Employee | Yes | 1 | E | (None) | Normal |
| Assistant | Yes | 0 | A | (None) | Assistant |
| Contractor | No | 2 | C | (None) | Normal |
| 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 |
| Vice President | Yes | 0 | <VP> | (None) | Normal |
| Director | Yes | 0 | <D> | (None) | Normal |

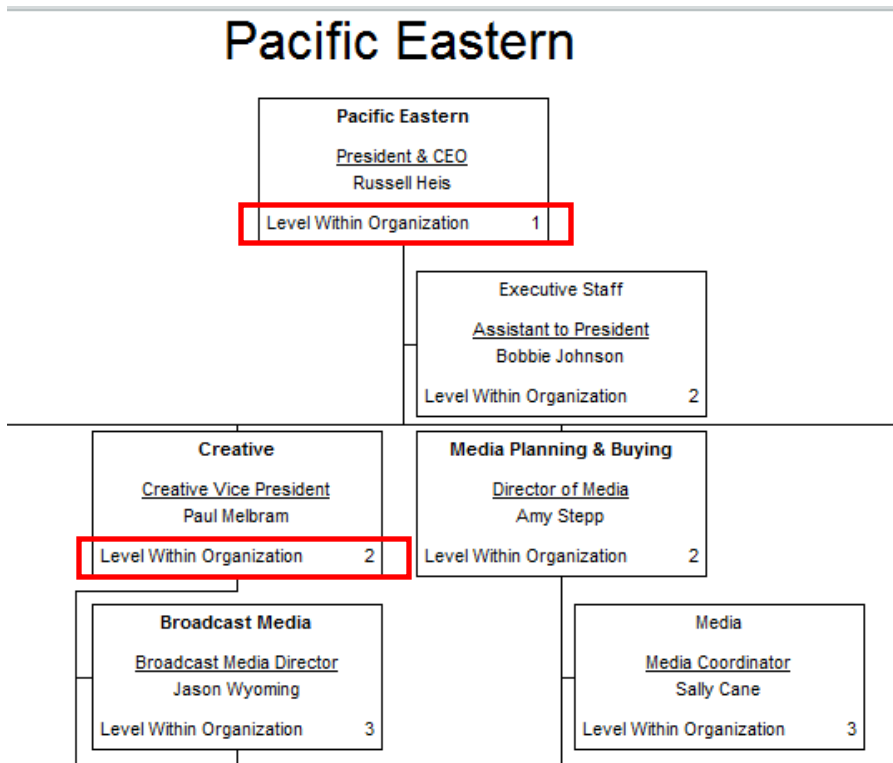
2.1 Display the Level Number in Each Chart Box

1. Create a Custom Field and assign to the appropriate Position Types.
2. Set the Type of field to Level Number (as noted below).

| Field label | Type | Calc Field | Population | Assigned To | Sample | Seq. |
|---------------------------|--------------|------------|------------|--------------------|--------|------|
| EmpID | Text | | | All Position Types | 19878 | 20 |
| Level Within Organization | Level Number | | | All Position Types | 4 | 21 |

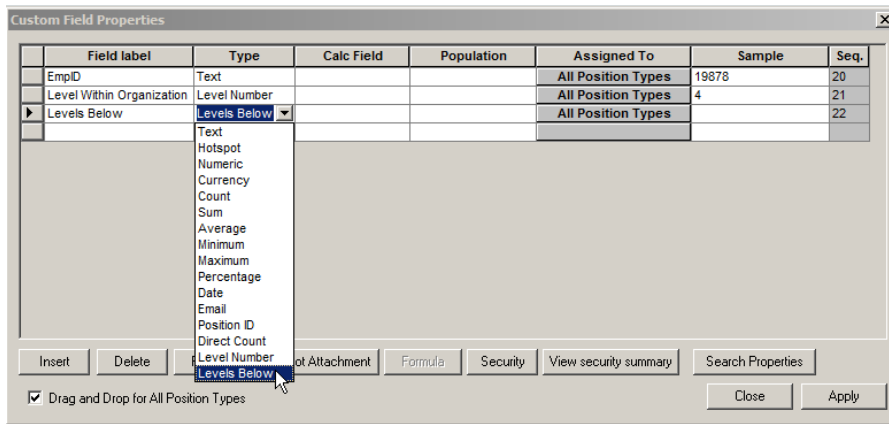
Drag and Drop for All Position Types

- 3. The level number for the chart box within the total organization is displayed.



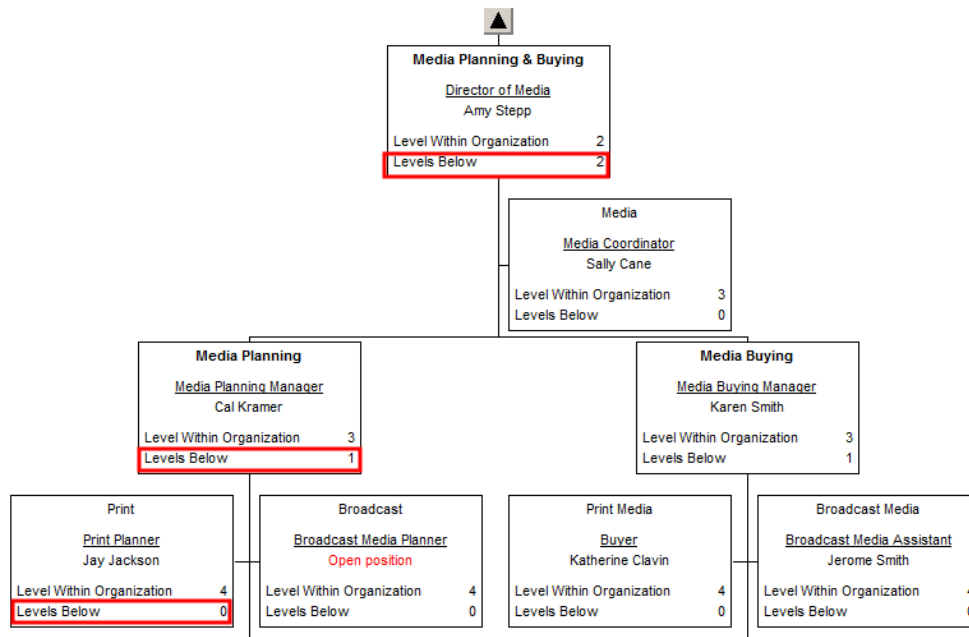
2.2 Display the Number of Levels Below the Chart Box

1. Create a Custom Field and assign to the appropriate Position Types.
2. Set the Type of field to Levels Below (as noted below).



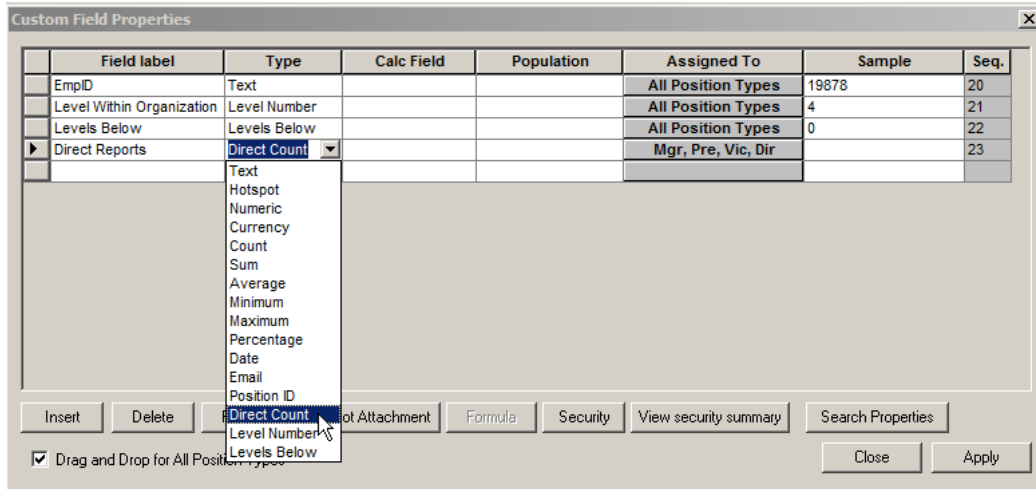
3. The number of levels below a chart box is displayed.

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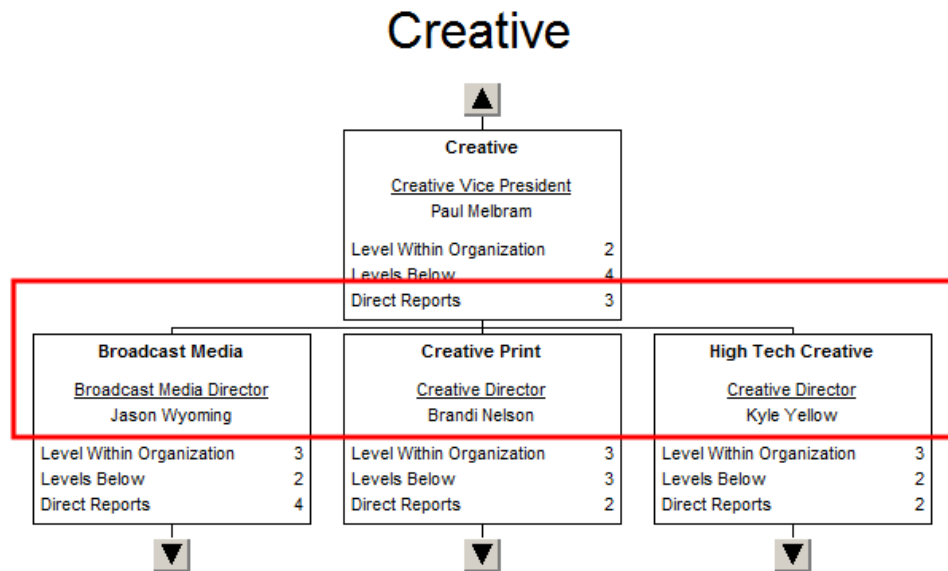


2.3 Display Direct Report Count

1. Create a Custom Field as noted below.

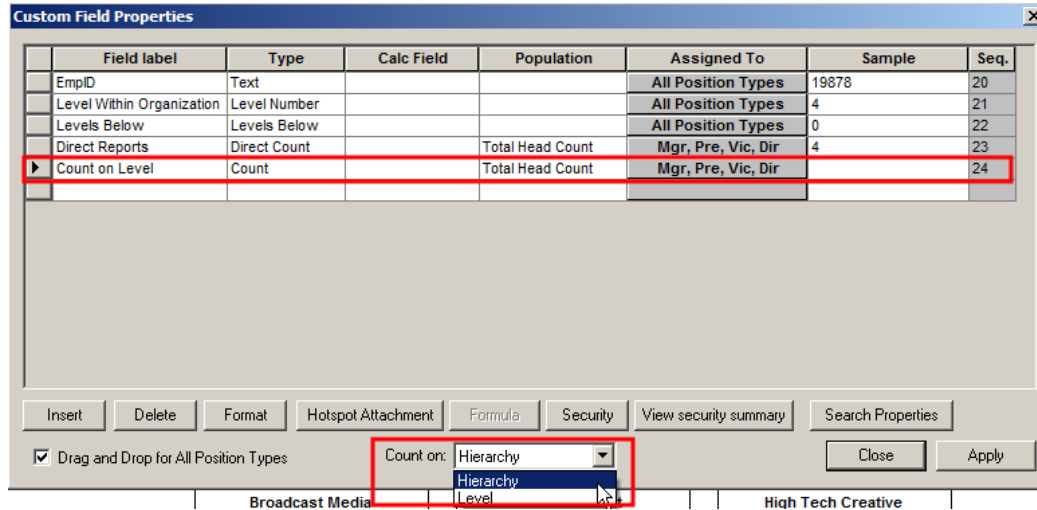


2. Direct Reports for each Manager, Director, Vice President and President display. In this example, 3 is the Direct Reports count for Paul Melbram. His 3 direct report boxes are highlighted (Jason Wyoming, Brandi Nelson and Kyle Yellow)

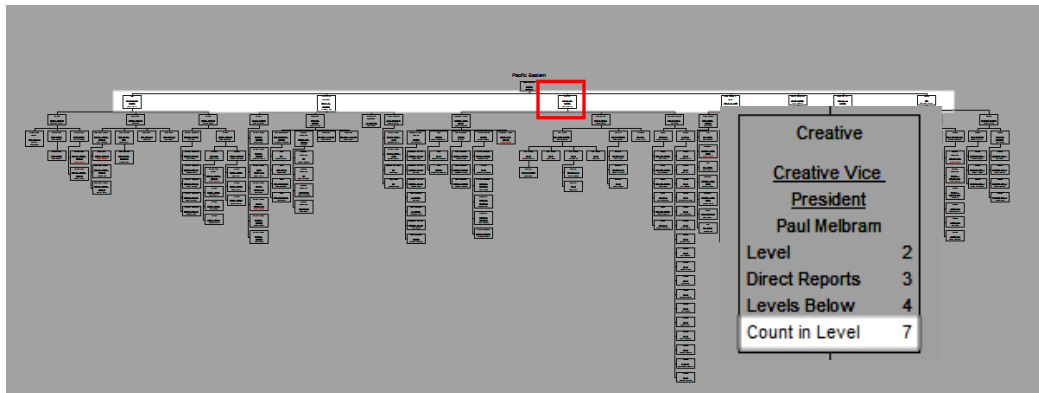


2.4 Summary Fields

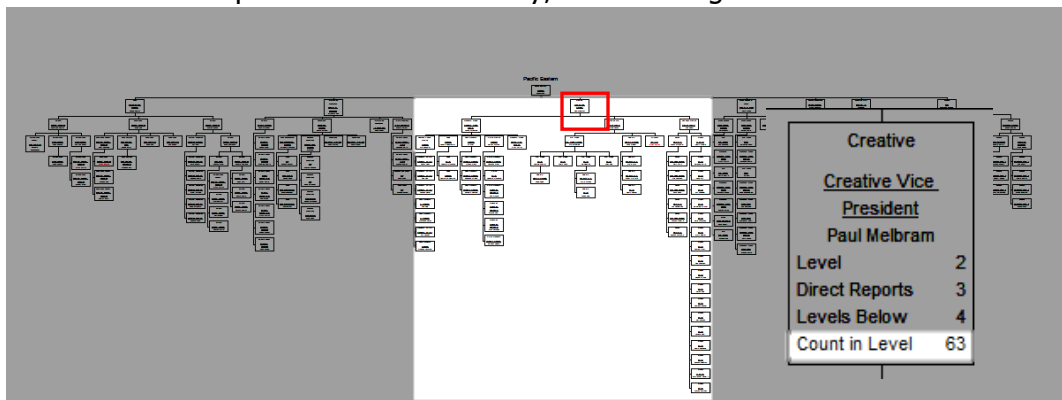
When creating a Summary Field using the Count, Sum, or Average, an additional option is available in OrgPublisher Premier. In the lower middle area of the dialog box, the option to select Level or Hierarchy is available. In the screenshot below, Count has been selected as the Type for the Count in Level Custom Field. The Count on: drop down has been added.



In the following screenshots Paul Melbram is in the red outlined box. If the Count on: option is set to Level, the resulting count would be 7.



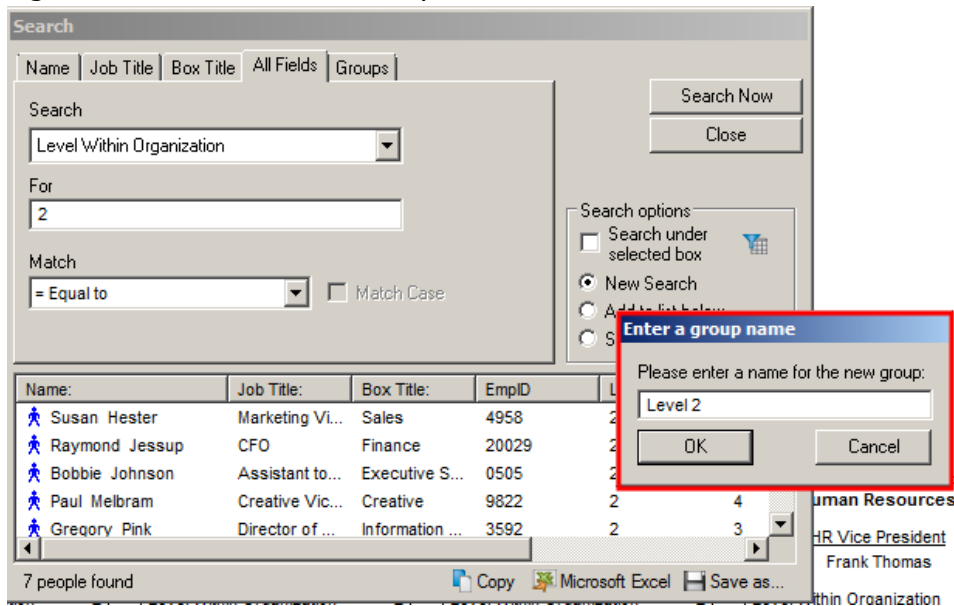
If the Count on: option is set to Hierarchy, the resulting count would be 63.



2.5 Create a Group for Each Level in the Organization

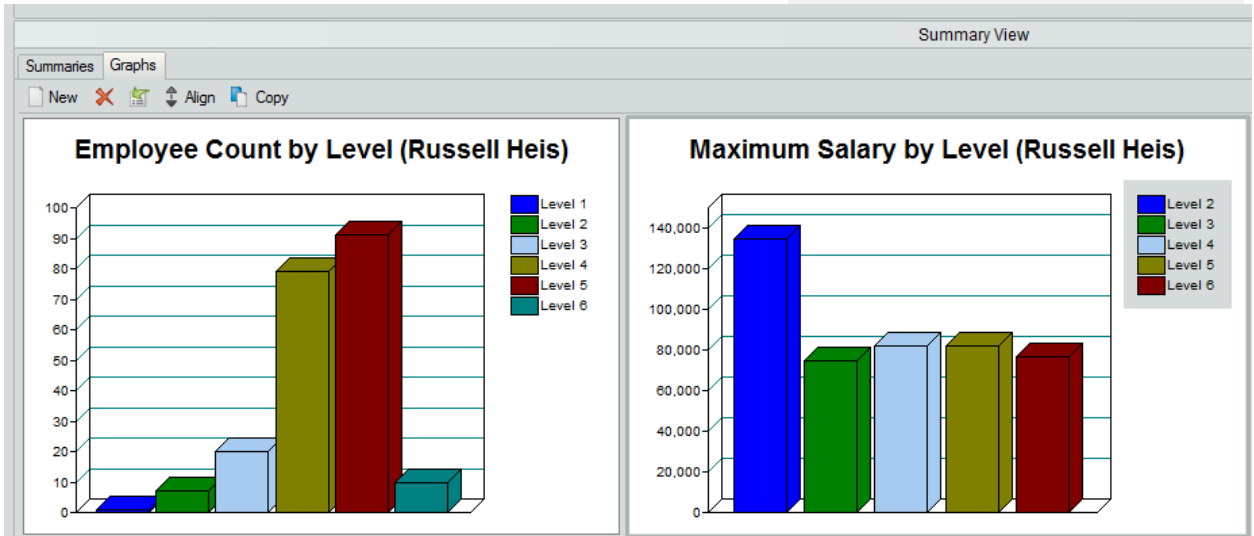
If additional calculations are required by Level, a Group should be created for each level in the organization. An example of this might be the need to total salary for each Level for display in the Summary View. By doing this, a graph could also be created.

1. Search on the 'Level Within Organization' Custom Field for 2 total levels in the organization and save as a Group.

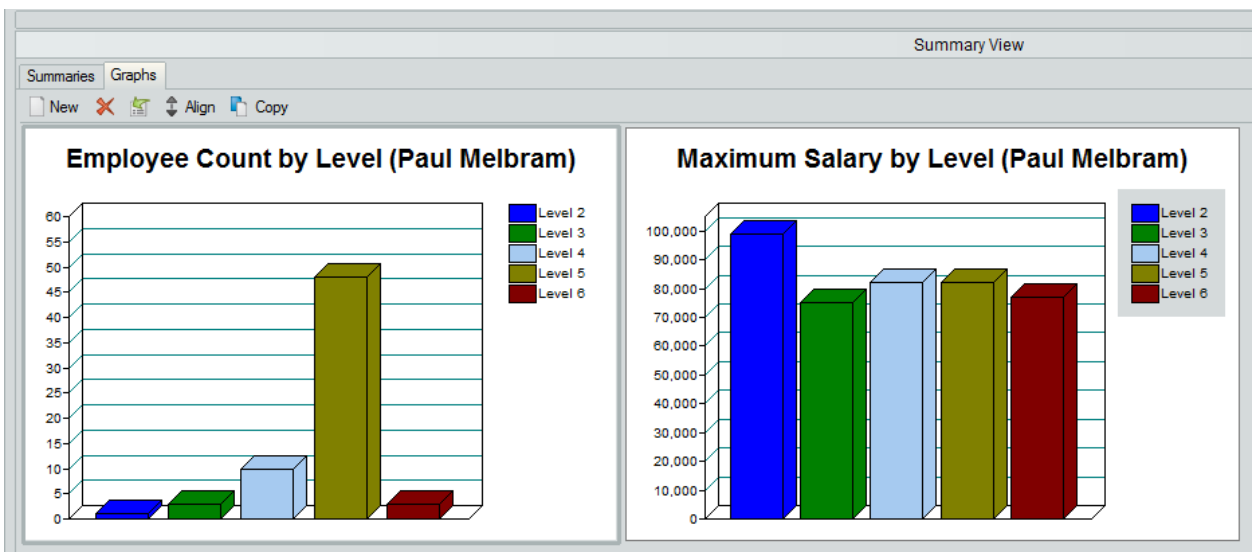


2. Display the Summary View. This will show the counts by Level and Maximum Salary for each of the Level groups. The second sample shows a graph for the Count and Maximum Salary by Level.

| Position type | Count | Max Salary by Level |
|---------------|-------|---------------------|
| Level 1 | 1 | |
| Level 2 | 7 | \$135,000 |
| Level 3 | 20 | \$75,000 |
| Level 4 | 79 | \$82,000 |
| Level 5 | 91 | \$82,000 |
| Level 6 | 10 | \$77,000 |



- Drilling up and down will reflect the totals within that extended span of control (currently displayed hierarchy).



3 Using the Level or Hierarchy Option with Groups

Using a Group as the Population provides more summary options. In the example below, a Custom Field is created to show the count of Level 5 employees within a hierarchy.

| Field label | Type | Calc Field | Population | Assigned To | Sample | Seq. |
|----------------------------|--------------|------------|------------------|--------------------|--------|------|
| EmpID | Text | | | All Position Types | 19878 | 20 |
| Salary: | Currency | | | All Position Types | 32000 | 21 |
| Level Within Organization | Level Number | | | All Position Types | 4 | 22 |
| Levels Below | Levels Below | | | All Position Types | 0 | 23 |
| Direct Reports | Direct Count | | Total Head Count | Mgr, Pre, Vic, Dir | 4 | 24 |
| Count on Level | Count | | Total Head Count | Mgr, Pre, Vic, Dir | 32 | 25 |
| Max Salary by Level 2 | Maximum | Salary: | Level 2 | All Position Types | 0 | 26 |
| Max Salary by Level 3 | Maximum | Salary: | Level 3 | All Position Types | 0 | 27 |
| Max Salary by Level | Maximum | Salary: | Level 4 | All Position Types | 32000 | 28 |
| Max Salary by Level 5 | Maximum | Salary: | Level 5 | All Position Types | 0 | 29 |
| Max Salary by Level 6 | Maximum | Salary: | Level 6 | All Position Types | 0 | 30 |
| Level 5 Count in Hierarchy | Count | | Level 5 | All Position Types | 0 | 31 |

Count on: Hierarchy

The chart box results show that Gregory Pink has 8 Level 5 employees in his hierarchy. Paul Melbram has 48 Level 5 employees in his hierarchy. Amy Stepp has 0 Level 5 employees in her hierarchy.

| Information Technology | Creative | Media Planning & Buying |
|--|---|--------------------------------|
| Director of Technology Gregory Pink | Creative Vice President Paul Melbram | Director of Media Amy Stepp |
| Level 5 Count in Hierarchy 8 | Level 5 Count in Hierarchy 48 | Level 5 Count in Hierarchy 0 |