

OrgPublisher Multiple Reports



OrgPublisher 10 Training

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1 Matrix, Indirect or Multiple Reports

What is Matrix Reporting?

- Dotted line or indirect report
- Employees wearing multiple hats – working in more than one position or serving more than one role

Why use matrix reporting?

- Manage people allocation
- During employee review, a system provides pertinent performance feedback collected from all direct and indirect managers.

How can I keep track of these relationships?

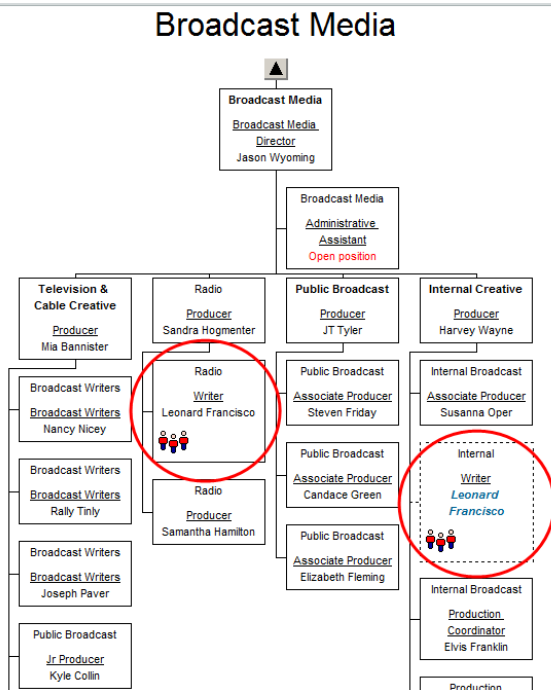
- Using Position Control in a major HR package
- Each position is a unique record. A person can fill more than one position and appear in the chart more than one time.

Data Sample

| Supervisor Position Number | Position Number | Department Name | Position Type | Employee Number | Last Name | First Name |
|----------------------------|-----------------|-----------------|---------------|-----------------|-----------|------------|
| 29 | 99 | Radio | E | 5647 | Francisco | Leonard |
| 93 | 56 | Internal | IE | 5647 | Francisco | Leonard |

Please note: Each Position Number (Box ID) should be unique for each record

Output Sample

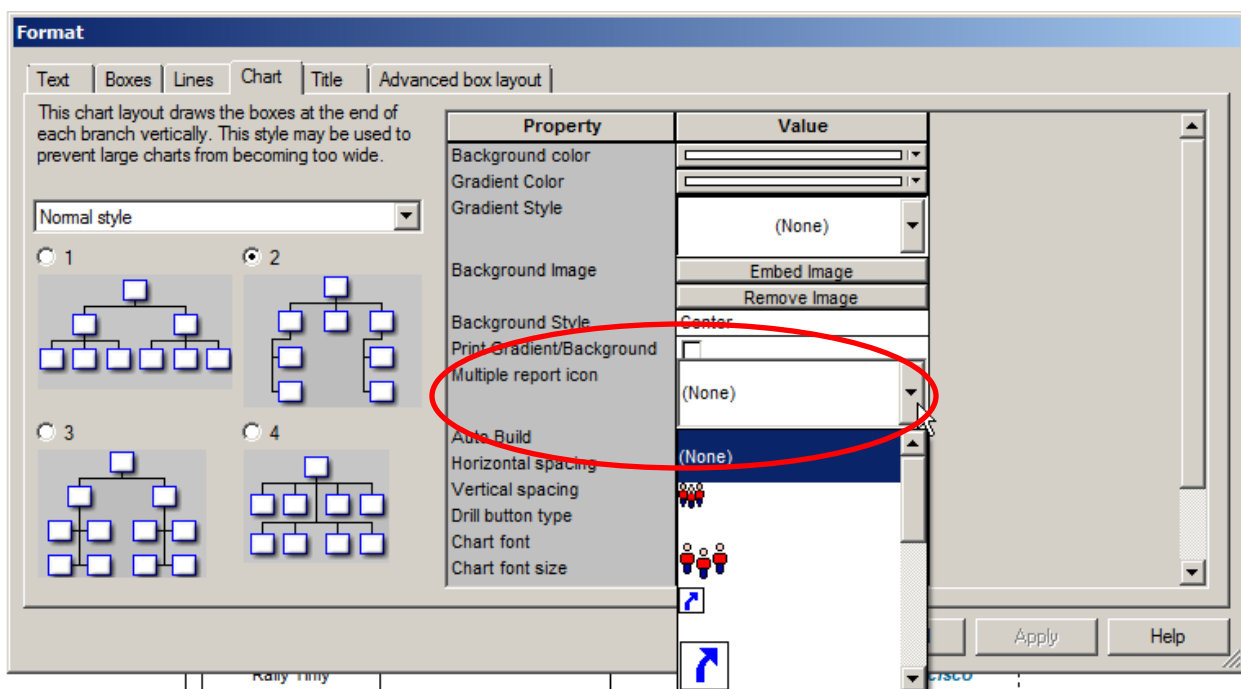


2 Multiple Report Icon

If proper data is sent to OrgPublisher, you can activate the Multiple Report Icon for employees who report to more than one supervisor (indirect reports).

Multiple report icons will show up for records with the same value in field 5 – the **Employee ID Field**.

1. Select **Format**, and then **Chart** to set the icon that shows multiple reports.
2. Select the icon to be displayed in the Multiple Report boxes by clicking the drop down arrow.
3. Select an icon delivered with OrgPublisher or point to your own icon.



3 Multiple Report Icon and the Search View

A viewer of a published chart can use the Multiple Report icon to display a list of all occurrences of that person within the chart. When the user clicks on the icon in a chart box, the Search View opens listing the various relationships for that person within the chart. The user can click on any of the listings to navigate to each position the person holds.

Broadcast Media

- Broadcast Media
 - Director: Jason Wyoming
 - Broadcast Media
 - Administrative Assistant (Open position)
 - Television & Cable Creative
 - Producer: Mia Bannister
 - Radio
 - Producer: Sandra Hogmenter
 - Radio
 - Writer: Leonard Francisco (Multiple Report icon)
 - Radio
 - Producer: Samantha Hamilton
 - Public Broadcast
 - Producer: JT Tyler
 - Associate Producer: Steven Friday
 - Associate Producer: Candace Green
 - Associate Producer: Elizabeth Fleming
 - Internal Creative
 - Producer: Harvey Wayne
 - Internal Broadcast
 - Associate Producer: Susanna Oper
 - Internal
 - Writer: Leonard Francisco (Multiple Report icon)
 - Internal Broadcast
 - Production Coordinator: Elvis Franklin
 - Production

Search View

Search Groups

Name: Last First = Any Part of Field

New search Go

Search under 'Leonard Francisco'

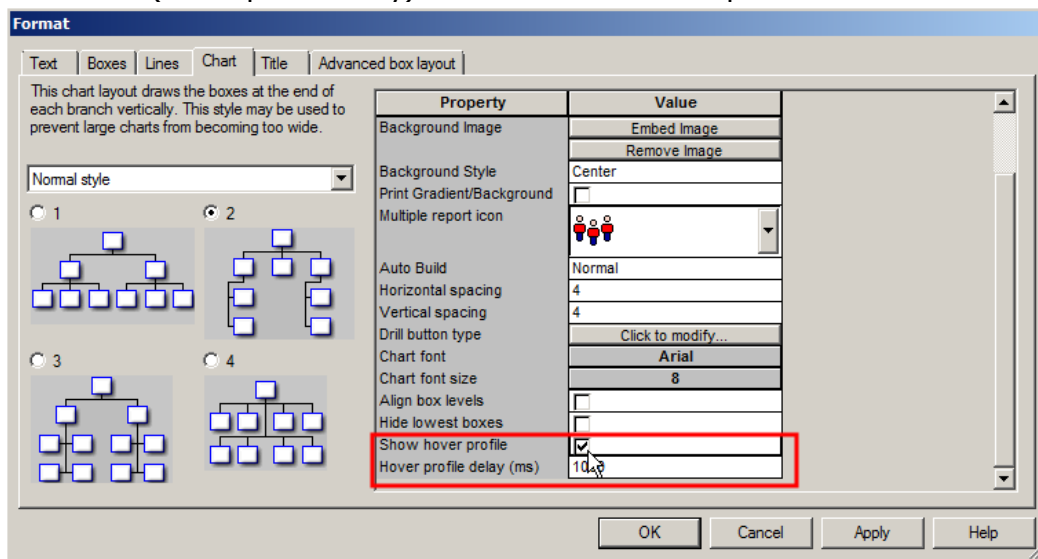
| Name | Job Title | Box Title |
|-------------------|-----------|-----------|
| Leonard Francisco | Writer | Internal |
| Leonard Francisco | Writer | Radio |

2 hits

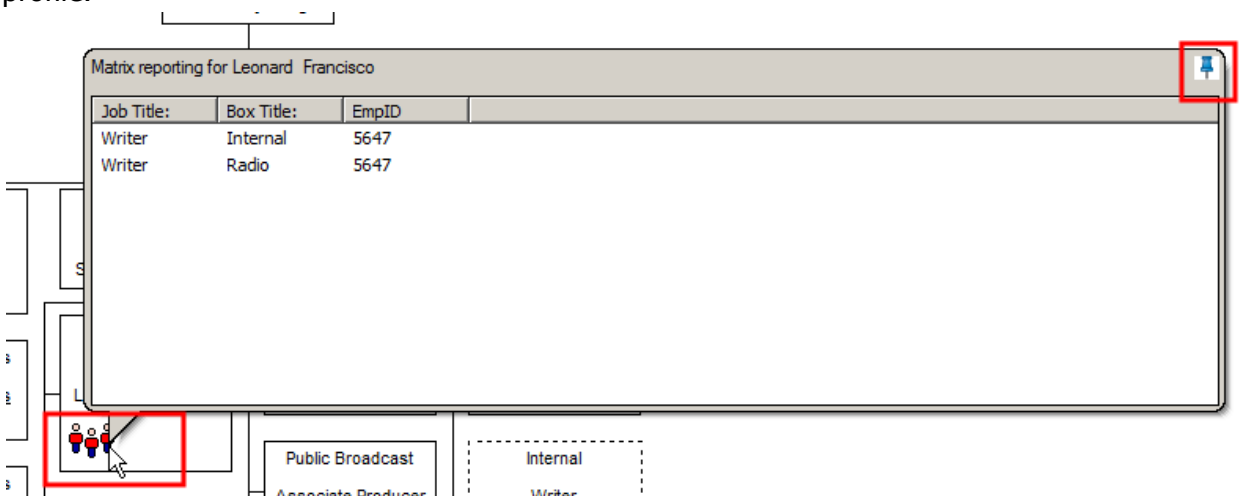
4 Multiple Report Icon and the Hover View

When Multiple Report icons are displayed and the hover profile has been selected to show, the user can see a list of all occurrences of that person within the chart.

1. Click on Format and then click on Chart.
2. Scroll down to display the Show hover profile option and click to check mark. Modify the hover time (Hover profile delay) to increase or lower required hover time. Click OK.



3. Locate a chart box with the icon displayed.
4. Place the mouse pointer over the icon. The list of occurrences will appear in the hover profile.



- Click the Push pin button to launch the Search View and pin the results.

Broadcast Media

List View
Search View

Search Groups

Name: Last First = Any Part of Field

New search Go

Search under 'Jason Wyoming'

| Name: | Job Title: | Box Title: |
|-----------------------------------|------------|------------|
| Leonard Francisco | Writer | Internal |
| Leonard Francisco | Writer | Radio |