

OrgPublisher Using Prebuilt Reports



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Introduction to Prebuilt Reports

OrgPublisher provides a series of prebuilt and preformatted charts available with the speed of ad-hoc reports but with critical information covering specific Human Resource related areas of interest.

These reports are created using either the Basic Input File Layout or the Advanced Input File Layout. Overview documents containing the layout spreadsheet and a sample CSV file can be found in the Customer Care Center, <u>Top Support Documents</u> web page.

The Basic layout allows you to quickly create a chart with key fields for your hierarchy, jobs, contact information, and headcounts.

The Advanced layout provides detailed field listing to provide the same information as in the Basic layout and, additionally, contains specific fields that can be used not only in OrgPublisher, but also in <u>Modeling</u> and <u>Org</u> <u>Design Center</u>.

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Basic Input File Layout

The **Basic** reports cover three main categories.

- Basic -
 - Basic chart
 - Directory Chart w/Photo
 - <u>Directory Chart</u>
 - Print Chart
 - <u>Contractors</u>
 - Open Positions
- Headcount
 - Headcount for a simple headcount per manager
 - Headcount with Span of Control that shows levels and
- Planning
 - Successors
 - Succession Plan



Basic Category – Basic File Layout

Basic Chart

Formatted to display employee photos. Show a high level chart of an organization's reporting structure with basic employee information in each box. This view allows employees to see who reports to whom.





Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo

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Directory Chart with Photos

Enable employees to see a photos of employees and to access basic contact information such as emails and phone numbers. This chart contains Chart and Search views. Quickly find members of the organization and email individuals or groups using the Search View. Drill-down for more comprehensive employee information by selecting a search result record in the Search View.

Pa	acific Eastern as of: 10/27/2015		<u>^</u>			4 * X
					List View	
	Pacific Eastern			S	earch View	
	President			Search Groups		
	Russell O Heis					First
	Phone: (215) 299-8420					
	Cell: 215) 999-10113			= Any Part of Field	New search	- 🕫 Go
	Email			*		
	Executiv	ve Staff		Search under 'Russell Heis'		Till Reset
	Assistant to			Name:	Box Title:	Job Title:
	Bobb	ie T Johnson		🖈 Emily Abbott	Media	Media Coordinato
	Phone Phone	e: (215) 299-8328		🖈 Lisa Abbott	Finance	Purchasing Agent
	Cell:	215) 999-10021		🛧 Omar Abdul	Applications	Applications Mana
	Email			🛧 Cheryl Adelsperger	Benefits	Benefits Specialist
				🛧 Abigail B Alexander	Web	Web Programmer
Sales	Creative	Human Resources		🛧 Gail P Amster	National	Product Specialist
Marketing Vice President	Creative Vice President	HR Vice President		🛧 Caroline Anderson	Finance	Accts Rec/Cash M
Susan N Hester	Paul M Melbram	Sam Patel		🛧 Olivia K Bailey	Business A	Programmer
Phone: (215) 299-8399	Phone: (215) 299-8366	Phone: (215) 299-8389		🖈 Henry K Banner	Collateral	Writer
Cell: 215) 999-10092	Cell: 215) 999-10059	Cell: 215) 999-10082		🔅 Mia P Bannister	Television	Producer
Email	Email	Email		🖈 Elizabeth Bartlett	Finance	Capital Purchases
A	0	O		🖈 James Bates	Broadcast	Broadcast Media F
U				🖈 Justin Baxter	Finance	Purchasing Agent
				🛧 Ryan B Benn	Design	Web Page Designe
				🛧 Carl L Best	Market Res	Research Manager
Information Technology	Finance	Media Planning & Buying		🖈 Bryan Boynton	Finance	Purchasing Agent
Director of Technology	CFO	Director of Media		🖈 Jason Bratton	Benefits	Benefits Manager
Gregory K Pink	Edward P Rodriguez	Amy Stepp		🖈 Susan I Bright	Network T	Hardware Technic
				🖈 Jenny L Bryanister	High Tech	Creative Director
Phone: (215) 299-8375 Cell: 215) 999-10068	Phone: (215) 299-8358 Cell: 215) 999-10051	Phone: (215) 299-8374 Cell: 215) 999-10067		★ Jenny I Bryanister <	Design	Dinital ∆rtist >
Email	Email	Email	J	- 	5	210 hits

Figure 2.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo
- Field 20: Email Address
- Field 21: Work Phone
- Field 22: Secondary Phone (Cell)

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Directory Chart

This basic Chart view enables employees to access contact information such as emails and phone numbers using the Search and Profile views. Drill-down for more comprehensive employee information by selecting a search result in the Search View to display in the Profile View.

Pacific Eastern a	as of: 10/27/2015	^					1 • X
				Pro	ofile View		
	Eastern		🔤 📄 🌐 🕱 0 p	inned			
	ident		Photo				^
Russe	I O Heis		Photo				
		_					
	Executive Staff Assistant to President						
	Bobbie T Johnson						
	BOBBIE I SOIIISOII		Name:	Russell O Hei	5		
Sales	Creative	_	Job Title:	President			
Marketing Vice President	Creative Creative Vice President		Box Title:	Pacific Easter			
Susan N Hester	Paul M Melbram		Email Address Work Phone	test@test.cor (215) 299-842			~
Susan in rester		-	Work Phone	(213) 299-044	20		~
0							1 + X
•				L	ist View		
				Se	arch View		
			Search Groups				
Human Resources	Information Technology		Search Groups				
HR Vice President	Director of Technology		Name:		First = Any I	Part of Field	-
Sam Patel	Gregory K Pink		New search	- ∽ Go >			
	L		Search under 'Russe	I Hoio'		Vin	Reset
•					La como		
			Name:	Box Title:	Job Title:	Email Address	Work
			🖈 Emily Abbott	Media	Media Coordinator	test@test.c	(215)
			🖈 Lisa Abbott	Finance	Purchasing Agent 1	test@test.c	(215)
Finance	Media Planning & Buying		📌 Omar Abdul	Applications	Applications Manage	r test@test.c	(215)
CFO	Director of Media		🛧 Cheryl Adelsper	Benefits	Benefits Specialist	test@test.c	(215)
Edward P Rodriguez	Amy Stepp		🖈 Abigail B Alexan	Web	Web Programmer	test@test.c	(215)
Ó	Ó		🖈 Gail P Amster	National	Product Specialist	test@test.c	(215)
►	—		* Caroline Anders	Finance	Accts Rec/Cash Mgr	test@test.c	(215)
			Olivia K Bailey	Business Applic	Programmer	test@test.c	(215)
			Henny K Ranner	Collateral	Writer	tert@tert c	(215) *
			<				>
		~	🖃 🖣 🎉 占	- A			210 hits

Figure 3.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo
- Field 20: Email Address
- Field 21: Work Phone
- Field 22: Secondary Phone (Cell)

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Print Chart

Display a high level chart of an organization's reporting structure with basic employee information in each box in a very simple, black-and-white format that is suitable for printing.

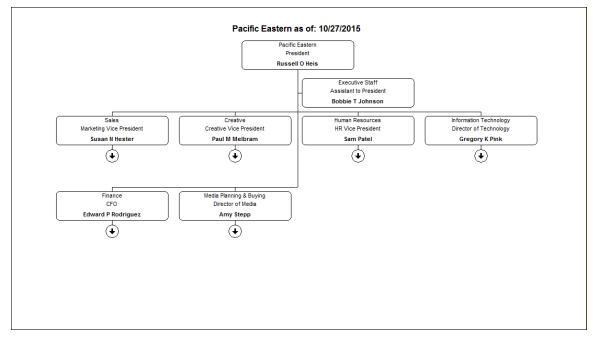


Figure 4.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title

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Contractors

Display a high level chart of an organization's reporting structure which only displays the names of individuals who are designated as contractors, noted by the icon displayed in the chart legend.

					4 ~ X
				List View	
Contractors			8	earch View	
			Search Groups		
			Name:		First
			= Any Part of Field	- New search	- 0°0 Go
			*		
Pa	acific Eastern as of: 10/27/2015	5	Search under 'Russell Heis'		The Reset
			Name:	Box Title:	Job Title:
	Pacific Eastern				
			Remily Abbott	Media	Media Coordinato
Sales	Creative	Human Resources	★ Lisa Abbott ★ Omar Abdul	Finance	Purchasing Agent
	Ó			Applications	
	•		Cheryl Adelsperger	Benefits	Benefits Specialist
			★ Abigail B Alexander ★ Gail P Amster	Web	Web Programmer
			Caroline Anderson	National	Product Specialist
Information Technology	Finance	Media Planning & Buying		Finance	Accts Rec/Cash M
Information recinitionagy	Finance	Media Planning & buying	🖈 Olivia K Bailey	Business A	Programmer Writer
			Henry K Banner Mia P Bannister	Collateral Television	
	-		K Elizabeth Bartlett		
			A James Bates	Finance Broadcast	Capital Purchases Broadcast Media F
			A Justin Baxter		
				Finance	Purchasing Agent
			★ Ryan B Benn ★ Carl L Best	Design Market Res	Web Page Designe
				Finance	Research Manager Purchasing Agent
			★ Bryan Boynton ★ Jason Bratton	Benefits	
			A Susan Bright	Network T	Benefits Manager Hardware Technic
			 Susan i Bright Jenny L Bryanister 	High Tech	
			Jenny L Bryanister	High Tech Design	Digital Artist
			<	riesinn	
			🖃 🖡 🐺 🔠 🍃	2	210 hits
				-	

Figure 5.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 20: Email Address
- Field 21: Work Phone
- Field 22: Secondary Phone (Cell)

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Open Positions

Display a high level chart of an organization's reporting structure which only displays the jobs that are designated as open positions, noted by the icon displayed in the chart legend.

					4 ~ X	
				List View		
Open Positions			Search View			
			Search Groups			
			Name:	▼ Last	First	
			= Any Part of Field	- New search	- 090 Go	
			*			
P	acific Eastern as of: 10/27/2015		Search under 'Russell Heis	2	The Reset	
	Pacific Eastern		Name:	Box Title:	Job Title:	
	Pacific Edition		Remily Abbott	Media	Media Coordinato	
Sales	Creative	Human Resources	Lisa Abbott	Finance	Purchasing Agent	
Jako	Citative	Human Resources	Cisa Abboli Omar Abdul	Applications	Applications Mani	
			Cheryl Adelsperger	Benefits	Benefits Specialist	
	_		Abigail B Alexander	Web	Web Programmer	
			Gail P Amster	National	Product Specialist	
			Caroline Anderson	Finance	Accts Rec/Cash M	
Information Technology	Finance	Media Planning & Buying	★ Olivia K Bailey	Business A	Programmer	
		L .	★ Henry K Banner	Collateral	Writer	
• • •	•	•	Mia P Bannister	Television	Producer	
			🖈 Elizabeth Bartlett	Finance	Capital Purchases	
			🖈 James Bates	Broadcast	Broadcast Media F	
			🖈 Justin Baxter	Finance	Purchasing Agent	
			🖈 Ryan B Benn	Design	Web Page Designe	
			🖈 Carl L Best	Market Res		
			🖈 Bryan Boynton	Finance	Purchasing Agent	
			🖈 Jason Bratton	Benefits	Benefits Manager	
			🖈 Susan I Bright	Network T	Hardware Technic	
			🖈 Jenny L Bryanister	High Tech	Creative Director	
			Ienny I Bryanister	Design	Dinital ∆rtist Y	
					>	
			🖃 🖺 🐺 🔠 🖉	E.	210 hits	

Figure 6.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 20: Email Address
- Field 21: Work Phone
- Field 22: Secondary Phone (Cell)

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Headcount Category – Basic Input File Layout

Headcount

Drill-up and down within the org chart to see an organization's simple head count fields.

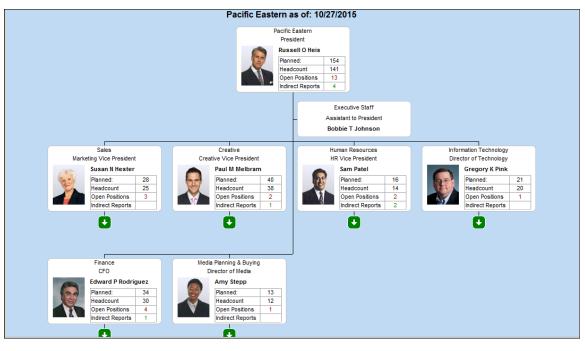


Figure 7.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo
- Field 23: Headcount
- Field 24: Planned Headcount
- Field 25: Open Position
- Field 30: Indirect Report

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Headcount with Span of Control

This style displays information about each manager's level in the reporting structure, the layers/levels below each manager, as well as total head count and average direct reports per manager at that hierarchical level. Summary fields reflect the counts relevant to each manager's span of control.

Pacific Easter	rn as of: 10/27/2015	A
		Summary View
ARpM: Average Reports per Manager Pa	acific Eastern	Summaries Graphs
	President	New 💥 🕍 ↔Align 🛧 🕹 Copy
	Russell O Heis	
	Planned: 154	
	Headcount 141	Headcount Graph in OrgUnit in charge by: (Russell Heis)
	Open Positions 13 Indirect Reports 4	
		Indirect Report - 4 - 1.19% -
Levels Below 5	Level Number ARpM 1 3	Assistant - 11 - 3.28% -
5	1 3	
		Open Positions - 13 - 3.88% -
	Executive Staff	Contractors - 34 - 10.15% -
	 Assistant to President 	Manager - 47 - 14.03% -
	Bobbie T Johnson	Employee - 85 - 25.37% -
		Occupied - 141 - 42.09% -
Sales	Creative	0 20 40 60 80 100 120 140
Marketing Vice President	Creative Vice President	0 20 40 60 80 100 120 140
Susan N Hester	Paul M Melbram	
Planned: 28	Planned: 40	
Headcount 25	Headcount 38	Occupied vs Open Positions in OrgUnit in charge by: (Russell Heis)
Open Positions 3	Open Positions 2	
Indirect Reports	Indirect Reports 1	
Levels Below Level Number ARpM		Open position - 13 - 8.44% -
4 2 2	4 2 4	
A		Occupied - 141 - 91.56% -
	· · · · · · · · · · · · · · · · · · ·	
		0 20 40 60 80 100 120 140
Human Resources	Information Technology	
HR Vice President	Director of Technology	Permanent vs Contractor Positions in OrgUnit in charge by: (Russell Heis)
Sam Patel	Gregory K Pink	
Planned: 16	Planned; 21	
Planned: 16	Planned: 21	· · · · · · · · · · · · · · · · · · ·

Figure 8.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo
- Field 23: Headcount
- Field 24: Planned Headcount
- Field 25: Open Position
- Field 30: Indirect Report
- Field 31: Levels Below
- Field 32: Level Number
- Field 33: Direct Reports
- Field 34: Average Reports per Manager

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Planning Category – Basic Input File Layout

Successors

This view displays possible successor candidates to specific manager positions in the chart.

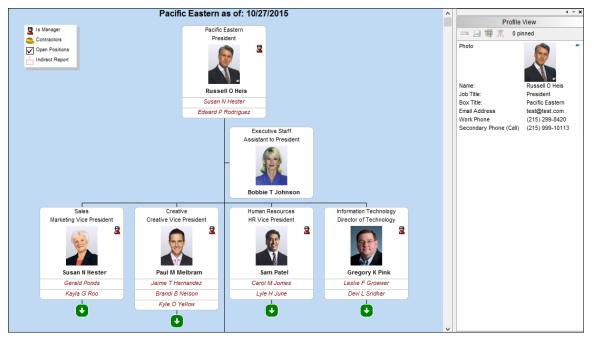


Figure 9.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo
- Field 20: Email Address
- Field 21: Work Phone
- Field 22: Secondary Phone (Cell)

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Succession Plan

Succession plan provides a simple yet effective report to identify succession and replacement candidates.

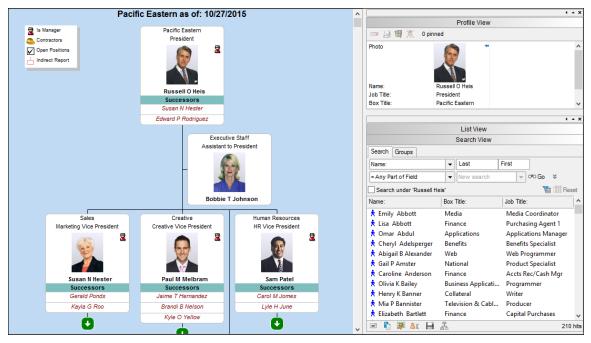


Figure 10.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 8: Middle Name
- Field 9: Job Number
- Field 10: Position Title
- Field 15: Photo
- Field 20: Email Address
- Field 21: Work Phone
- Field 22: Secondary Phone (Cell)

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Advanced File Layout

The **Advanced** reports cover four main categories.

- <u>General</u>
 - <u>Contact Information</u>
 - <u>Contractors</u> currently on staff
 - <u>Directory</u> providing additional functionality not available in the Contact Information report
 - Open Positions report
 - Org Chart
 - Org Chart with a Profile view
 - Org Chart with Photos
 - Printing version
- <u>Management</u>
 - Head Count
 - Head Count with Open Positions
 - Span of Control Analysis
- Planning
 - Head Count/FTE/Contractors
 - Salary and Head Count
 - Salary/Head Count/Performance
 - Span of Control with Performance
 - Talent Review
- <u>Succession</u>
 - Succession
 - Succession Planning
 - Succession Rating
 - Succession Rating with Photos



General Category – Advanced File Layout

Contact Information

Display a high level chart of an organization's reporting structure with basic employee information in each box. Designed to meet the needs of a broader audience, this view allows employees to see who reports to whom and basic contact information for each person or position in the organization.

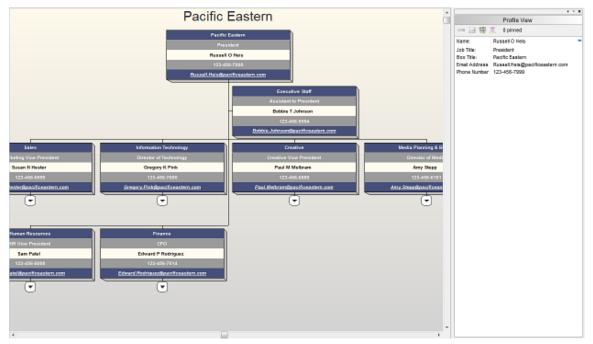


Figure 11.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 49: Email Address
- Field 50: Phone Number

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Contractors

Display a high level chart of an organization's reporting structure which only displays the names of individuals who are designated as contractors, along with basic contact information for each person or position in the organization.

	(Pacific Eastern		Contactors
Broadcast Media Broadcast Media Director Public Broadcast	Internal Creative	Creative	Creative Vice President Creative Print Creative Director Print Media	
Producer Producer Public Broadcast Associate Producer Elizabeth M Penning	Internal Couldres	Print Media <u>Writer</u> Collateral Collateral Dave I Reed	Print Hoola Print Modia Writer Coltational Print Modia Writer Coltational Writer Stream Victor Jacob K Kine	Print Media <u>Writer</u> Judy II King

Figure 12.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title

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Directory

Enable employees to access basic contact information such as emails and phone numbers. This chart contains Chart, Search and Profile views. Quickly find members of the organization and email individuals or groups using the Search View. Drill down for more comprehensive employee information by selecting a search result in the Search View to display the Profile View.

Pacific E	astorn					4 - X
Pacific Eastern					List View	
					Search View	
Pacific East	stern	Search Groups				
Preside	et	Narrei -	Last	First	- Any Part of Field New search	- 0°0 Go ¥
RussellO	Heis	Search under Russel Kein'		-		Via III Reast
123-456-7	7999	1	Job Title:		Box Title :	Ernal Address
Ryssell Hais@pacit	Scentern com	Name:				
	The operation of the op	Abbott Emily Abbott	Media Coo		Media	Emily Abbott@pacificeas
	Executive Staff	tisa Abbott	Purchasing		Finance	Lisa.Abbott@pacificeaste *
		🕈 Omer Abdul		is Manager	Applications	Omar.Abdul@pacificeast
	Assistant to President	🖈 Cheryl Adelsperger	Benefits Sp		Benefits	Cheryl.Adelsperger@paci
H	Bobble T Johnson	Abigail B Alexander	Web Progr		Web	Abigail Alexander@pacifi
	123-496-5954	🖈 Gail P Amater	Product Sp	ecialist	National	GaiLAmster@pacificeaste
		🖈 Caroline Anderson	Accts Rec/	Cash Mgr	Finance	Caroline.Anderson@pacit
	Bobbie Johnson@pacificeaster	🖈 Olivia K Bailey	Programm	er	Business Applications	Olivia.Bailey@pacificearts
		Henry K Banner	Writer		Collateral	Henry-Banner@pacificea:
Sales	Information Technology	🖈 Mia 🖗 Barinister	Producer		Television & Cable Creative	Mia.Bannister@pacificear
Marketing Vice President	Director of Technology	📩 Elizabeth Bartlett	Capital Pu	chases	Finance	Elizabeth.Bartlett@pacific
Susan N Hester	Gregory K Pink	🛧 Jarries Bates	Broadcast	Media Planne	r Broadcast	James Bates @pacificeaste
123,456,6999	123-456-7000	🛧 Justin Baxter	Purchasing	Agent 2	Finance	Justin Baxter@pacificeast
		🖈 Ryan B Benn	Web Page	Designer	Design	Ryan.Benn@pacificeatter
on Hosterilizacificaastern.com	Gregory.Pink@pacificeastern	🕈 Carl L Best	Research N	lanager	Market Research	Carl.Best@pacificeastern.
		* Bryan Boynton	Purchasing	Agent 3	Finance	Bryan,Boynton@pacificau
•		A Jason Bratton	Benefits M	anager	Benefits	Jason Bratton @pacificeas
Creative	Media Planning & Buying	🖈 Susan I Bright	Hardware	Technician	Network Team	Susan.Bright@pacificeant
		A Jenny L Bryanister	Creative D	rector	High Tech Creative	Jenny, Bryanister@pacific
Creative Vice President	Director of Media	* Jenny L Bryanister	Digital Arti	at	Design	Janny, Bryanister@pacifics
Paul M Helbram	Arry Stepp	t Linda Bullock	AP Clerk 2		Finance	Linda.Bullock@pacificeas
123-456-6888	123-456-6161	Authew Bullock	Benefits Sp	ecialist	Benefita	Matthew.Bullock@pacific
Melbram@pacificeastern.com	Amy, Stapoßpacificeastern.c	Amanda Burton	AP Clerk1		Finance	Amanda.Burton@pacifice
		t Julie Cegney	Benefits Sp	ecialist	Benefits	Julie.Cegney@pacificeant
	•	A Mary A Callister	Writer		HiTech	Mary Callister@pacificea:
		* Sally Cane	Media Coo	rdinator	Media	Sally.Cane@pacificeatten
Human Resources	Finance	Tyler Carlton		dger Manager		Tyler. Carlton@pacificeast
HR Vice President	OFO	Panas R Clann	Wals Marts		Wah	Rama ClaneReactionert
		*				*

Figure 13.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 49: Email Address
- Field 50: Phone Number

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Open Positions

Visually highlight open positions within the organizational chart using this view. Open positions are displayed in light red and all other boxes are collapsed to emphasize vacancies and their position in the reporting structure.

	Pacific East President			
	Creative Creative Vice President		Media Planning & Buying Director of Media	Human Resources HR Vice President
Broadcast Media Broadcast Media Director		Creative Print Creative Director	Media Planning Media Planning Variager	Recruiting Recruiting Vanager
	Broadcast Media demokrative Assistant Open position	Graphics Busitistor Open position	Broadcast Broadcast Media Panner Open position	Recruiting Technical Recruiter Open position
				Recruiting Recruiter Open position

Figure 14.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title

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Org Chart

Display a high level chart of an organization's reporting structure with basic employee information in each box. Designed to meet the needs of a broader audience, this view allows employees to see who reports to whom and basic contact information for each person or position in the organization.

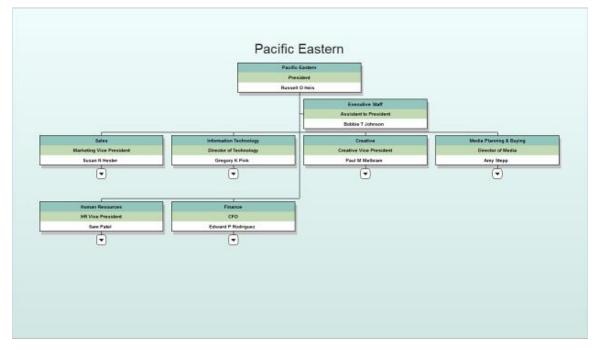


Figure 15.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title

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Org Chart with Profile

Similar to the Org Chart template that also displays a Profile View of the basic contact information for any selected box in the org chart. Designed to meet the needs of a broader audience, this view allows employees to see who reports to whom and basic contact information for each person or position in the organization.

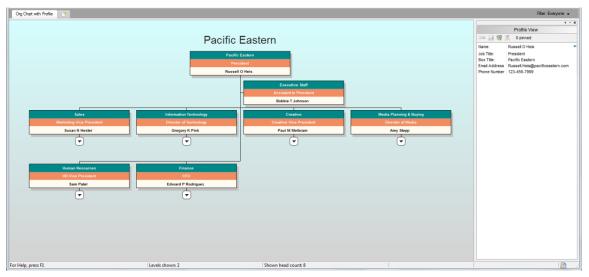


Figure 16.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 49: Email Address
- Field 50: Phone Number

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Org Chart with Photos

Similar to the Contact Information org chart and formatted to display employee photos. Display a high level chart of an organization's reporting structure with basic employee information in each box. Designed to meet the needs of a broader audience, this view allows employees to see who reports to whom and basic contact information for each person or position in the organization.



Figure 17.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 15: Photo
- Field 49: Email Address
- Field 50: Phone Number

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<u>Printing</u>

Display a high level chart of an organization's reporting structure with basic employee information in each box in a very simple, black-and-white format that is suitable for printing.

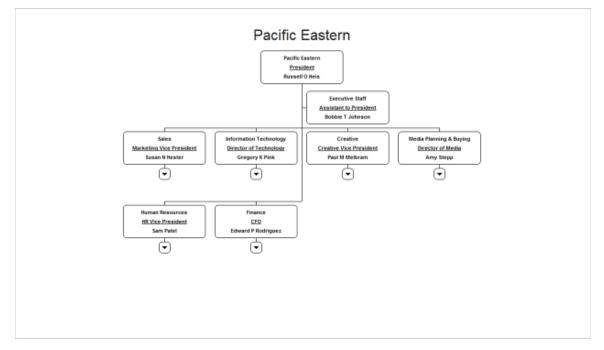


Figure 18.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title

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Management Category – Advanced File Layout

Head Count

Drill up and down within the org chart to see an organization's current head count and direct reports. Summary data in this view reflect the counts relevant to each manager's span of control. Use the Search View to quickly access information about an individual or group or the Profile View to provide comprehensive information regarding each chart record.

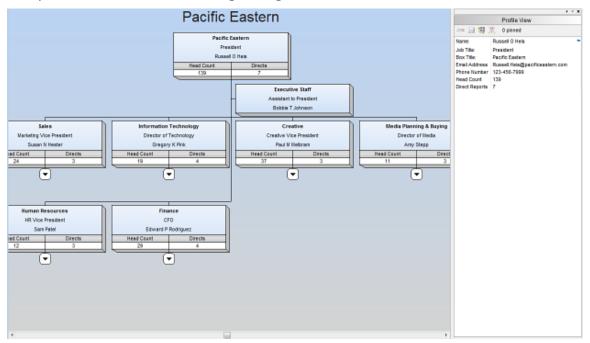


Figure 19.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 49: Email Address
- Field 50: Phone Number

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Head Count with Open Positions

Drill up and down within the org chart to see an organization's current head count, direct reports, open positions, and planned head count. Summary data in this view reflect the counts relevant to each manager's span of control. Use the Search View to quickly access information about an individual or group or the Profile View to provide comprehensive information regarding each chart record.

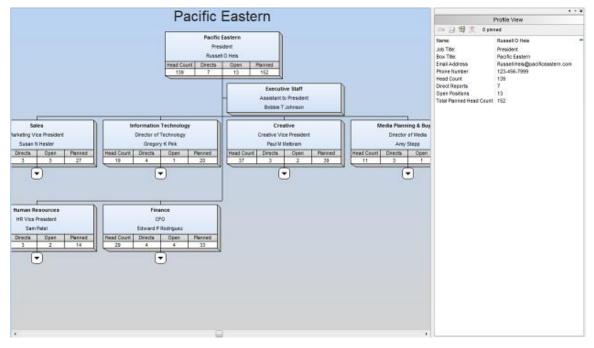


Figure 20.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 49: Email Address
- Field 50: Phone Number

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Span of Control Analysis

Easily access information about each employee's level in the reporting structure, how many layers are below each record, as well as total head count and average direct reports per manager at that hierarchical level within the organization. OrgPublisher's built-in summary engine displays only the hierarchy and span of control information relevant to each manager's position within the organization.

	Pacific	Eastern			4 - 2
	Facilie	Lastern		Protile Vie	ew
				三日母末 sprined	
	Pacific I			Photo	A -
	Presi Russell				12
	Spen of				
	Direct Leve				N -
	Reports Number			1223	100000000000000000000000000000000000000
	7 1	5		Nara: Jub Title:	Russell D Hela
	Head Count	Average Rots per Wanager		Bax Title:	President Peolfic Eastern
	139	2.97		Direct Reports	7
				Levels Below	5
		Executive Staff		Level Number	1
		Assistant to President		Average Reports per Manager Head Count	2.97
		Bobbie T Johnson		Open Pasitions	13
				Total Planned Head Count	152
Select	Information Technology	Creative	Media Planning -	2011/10/06/12/07/06/12/12/12	
No Vice President	Director of Technology	Creative Vice President	Director of N		
san II Hester	Gregory K Pink	Paul M Melbram	Amy Step		
In of Control	Span of Control Direct Level Levels	Spen of Control Direct Level Levels	Direct Level		
Aunber Beltiw	Reports Number Below	Reports Number Below	Reports Number		
2 4	4 2 3	3 2 4	3 2		
Hierarchy	Hierarchy	Hierarchy	Hieraroh		
Average Rots per Manager	Head Count Average Rots per Vanager	Head Court Average Rats per Manag			
2.10	19 3.00	37 3.29	"		
		•	(P)		
0		0	0		
100					
m Resources	Finance				
ice President	CFO				
Sam Patel	Edward P Rodriguez				
in of Control	Spen of Costrol				
Level Levels	Direct Level Levels				
Aunber Belliw	Reports Number Below				
2 2 Hierarchy	Hierarchy				
and the second s				1	

Figure 21.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title

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Planning Category – Advanced File Layout

Head Count, FTE, Contractors

Drill up and down within the org chart to see an organization's current head count, contractors, and total full time employee equivalents. Summary data in this view reflect the counts relevant to each manager's span of control. Actively plan and run "What-If?" scenarios for changing structure of one or more departments and display resulting tally of total head count, contractors, and full time equivalents.

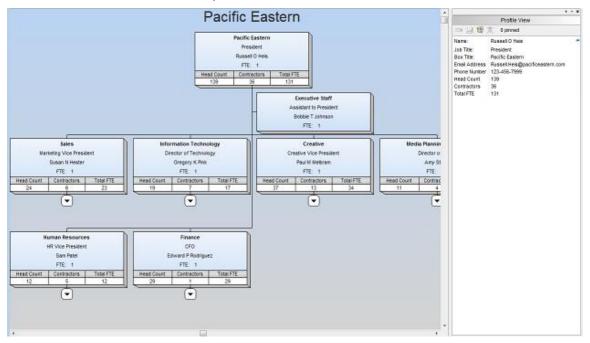


Figure 22.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 49: Email Address
- Field 50: Phone Number
- Field 57: Full Time Equivalency

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Salary and Head Count

Drill up and down within the org chart to see an organization's current head count and corresponding workforce cost (salary). Summary data in this view reflect the counts relevant to each manager's span of control. Actively plan and run "What-If?" scenarios for changing structure of one or more departments and display resulting tally of total head count and workforce cost for budgeting purposes.

		Pacific I	Eastern		1	Profile	i - x
		Pacific Eastern	N				ned
	5	President Russell O Heis Salary: \$150,000				Photo	<u></u>
		Total Salaries 55,455,000	Heed Count: 135 Executive Net Assistant to President Bobio T Johnson Salary: 552,000			Name: Job Title: Box Title: Base Salary Head Count Open Positions Total Planned Head Count.	Russell O Hela President Pacific Eastern \$150,000 139 13 152
Sales	Information Technology		Creative	Media Planning & i		Total Salaries	\$6,499,000
Marketion Vise President Sonarn Hierory Solary: 500,000 Total Salaries 51.103.000 Wead Count: 24	Director of Feshnology Gregory K Pink Salary: 500,000 Total Selaries 5728.000	Head Count: 15	Costition Vise Desident Paul M Melena Salary: 999.000 Total Salaries \$1,819.000 Head Grant 37	Director of Media Any Stepp Satary: \$135,000 Total Salaries 547			
Human Resources	Finance		1				
1 Vice Tradient Serr Patel Seler: \$100.003 Total Salaries \$505.000 Head Count: 12	CPO Edward P Rodriguez Selery: 576.000	Head Count 29			•		

Figure 23.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 81: Base Salary

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Salary, Head Count, and Performance

For greater insight into talent for planning purposes, the Salary, Head Count, and Performance chart greatly expands on the information provided in the Salary and Head Count chart by adding metrics for employee performance and potential ratings, as well as date of hire. Drill up and down within the org chart to see an organization's current head count and corresponding workforce cost (salary). Summary data in this view reflect the counts relevant to each manager's span of control. Actively plan and run "What-If?" with greater visibility into the talent of the organization as you look to plan and budget for the future.

Pac	fic Eastern	Profile View
Pacific Eastern President Russell O Heis Salary Hi	Date Performance Potential	□□] 坦 京 Opined Photo
1550,000 09 Total Salaries: 5		Name: Russell O Hels Job Title: President Box Title: Pacific Eastern Hire Date 00152006
	Executive Staff Assistant to President Bobbie T Johnson Salary Hire Date Performance Potential S52,009 08/21/2004 3 30	Performance Rating 3 Potential Rating 60 Base Salary \$150,800 Email -Advens Russell Hei@pacificeastern.com Phase Numiter 123-456-7099 Direct Reports 7 Levell Number 1 Levell Return 5
Information Technology Director of Technology Gregory K Pink	Creative Creative Vice President Paul M Meltaram	Average Reports per lifenager 2.97 Head Count 139 Open Positions 13
nance Potential Salary Hire Date Performance Potential 596,000 08/12/2004 4	tial Salary Hire Date Performance Potential Salary Hire	Tetal Planned Head Court 152 Total Salaries \$8,489,000 Court: High Performers 57 %: High Performers 37.59%
d Count: 24 Total Salaries: \$720,000 Head Count: 19	Total Salaries: \$1,515,000 Head Count: 37 Total Salaries: \$4	
Finance SEQ Edward P Rodriguez		
Trance Potential Salary Hire Date Performance Pote		-

Figure 24.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 36: Hire Date
- Field 49: Email Address
- Field 50: Phone Number
- Field 63: Performance Rating
- Field 64: Potential Rating
- Field 81: Base Salary

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Span of Control with Performance

Leveling the organization by evaluating span of control and number of direct reports is another value tool for running "What-If?" scenario analysis to ensure the reporting structure is balanced. Easily access information about each employee's level in the reporting structure, how many layers are below each record, as well as total head count and average direct reports per manager at the hierarchical level within the organization.

OrgPublisher's built in summary engine displays only the hierarchy and span of control information relevant to each manager's position within the organization, and provides metrics on total head count, average number of reports, and number and average of High Performers. Unlike the Salary related planning templates that focus on budget, this report focuses on balancing the reporting organization with an eye on where the top talent resides.

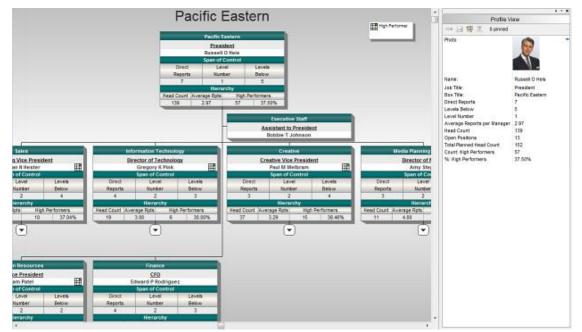


Figure 25.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 4: Position Type
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 63: Performance Rating

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Talent Review

Develop a deep understanding of your talent by viewing key HR metrics about each employee to facilitate your talent review and management process. Easily identify critical roles in which succession plans are required, as well as the performance and potential rating of each employee. You can also locate where retention risks exist and which valued employees would result in a high impact of loss. Profile information provides additional information about each employee.

			acine	Eastern			High Performer
		Ers Su	iffic Eastern sident ccession Pan Require cal Role:	a y			Critical Roles High Impact of Lo High Retentor Ra
		Fut	isell O Heis				
		Fer	formance Rating.	3			
		Pot	ential Rating:	62			
		10.55	act of Loss.	High			
		Ret	ention Risk:	Medium			
				Assistent to Prosident Succession Pan Requred Critical Role Bobber J Johnson Performance Rateg Petential Rateg Injunct of Lass Hatenten Rak	N N 3 30 Low Low		
Sales Marketing Vice President Succession Par Regured:	¥	Information Technology Director of Technology Succession Plan Required	*	Creative Creative Vice President Succession Plan Required	Y	Modia Planning & Baying Director of Media Succession Plan Required	×
Critical Role:	Ŷ	Critical Role:	Y	Critical Role:	Y	Critical Role	Y
Susan N Heater	# 1	Gregory K Pink	11 V	Paul M Melbram	11 7	Amy Stepp	H 2
Performance Rating	4	Performance Rating.	4	Performance Rating	4	Performance Rating:	
Petential Rating:	80	Potential Rating	70	Potential Rating	40	Potential Rating	40
Impact of Loss	High	inpact of Loss	High	Impact of Loss	High	Impact of Loss:	High
Referition Rak:	Low	Referition Risk:	High	Retention Risk	liedun	Retention Risk	High
(v)		•		•		(*)	

Figure 26.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 36: Hire Date
- Field 38: Birth Date
- Field 39: Gender
- Field 40: Ethnicity
- Field 46: Country Code
- Field 47: Region
- Field 48: Location
- Field 49: Email Address

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- Field 50: Phone Number
- Field 54: Critical Role
- Field 63: Performance Rating
- Field 64: Potential Rating
- Field 71: Impact of Loss
- Field 72: Retention Risk
- Field 77: Succession Plan Required

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Succession Category – Advanced File Layout

Succession

Succession provides a simple yet effective report to identify succession and replacement candidates. Drill up and down within the org chart to view all succession candidates.

	Pacific E	Eastern	á í	Pi	ofile View
				— 🖂 標 💢 🎙 pinne	ed .
	Pacific Eastern Seccession Candidate	Prazidant Russel O Heix a:		Phote	·
	Edward P Rodriguez				Russell O Heis
	Sunan N Henter				President Pacific Eastern
Marketing Vice President Susan N Heater Succession Candidates: Sur Genet Ponds Do	termation Technology Director of Technology Gregory K Pric accession Candidates: Devi L Sether Laste F Growwer T	Exection Vice President Paulit Matrim Succession Candidates: So Kyle D Yalow	edia Planning accession Car Cal Kramer	Phone Number Casathy Code Casathy Code Casathy Code Ethnicko Birh Date Birh Date Birh Date Birh Date Himothy Here Date Critical Role Succession Plan Required Performance Rating Peternia Rating Impact of Lose	Ransel Hein (graditionation con 123–65-700) USA CA San Francisco Mi Caccanan 0024/1922 N 001522006 Y Y S G0 High High Hiedum
Human Resources	lance				
	EEQ Edward P Rodriguez Increasion Candidates:				
4					

Figure 27.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 36: Hire Date
- Field 38: Birth Date
- Field 39: Gender
- Field 40: Ethnicity
- Field 46: Country Code
- Field 47: Region
- Field 48: Location
- Field 49: Email Address
- Field 50: Phone Number

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- Field 54: Critical Role
- Field 63: Performance Rating
- Field 64: Potential Rating
- Field 71: Impact of Loss
- Field 72: Retention Risk
- Field 77: Succession Plan Required

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Succession Planning

Identify key positions and potential successors within the organization. Determine which key people have high retention risk and impact of loss, visualize employees in a 9 Box View, and use Profile View to see in-depth organizational data. Identify potential successors for positions requiring succession plans, compare their performance, and generate a change report to send succession suggestions to an approver or update the system of record.

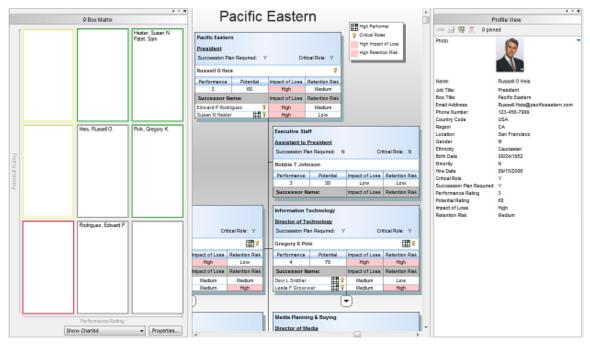


Figure 28.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 36: Hire Date
- Field 38: Birth Date
- Field 39: Gender
- Field 40: Ethnicity
- Field 46: Country Code
- Field 47: Region
- Field 48: Location
- Field 49: Email Address

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- Field 50: Phone Number
- Field 54: Critical Role
- Field 63: Performance Rating
- Field 64: Potential Rating
- Field 71: Impact of Loss
- Field 72: Retention Risk
- Field 77: Succession Plan Required

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Succession Ratings

Visualize all employees with easy-to-follow, color-coded status indicators that rate the performance, potential, risk, and loss impact of each employee and their successor candidate. Drill up and down within the org chart to evaluate the organization's talent. Quickly identify high loss impact individuals to help put in retention plans. Identify high performers and identify those employees with lower ratings that may benefit from a develop program.

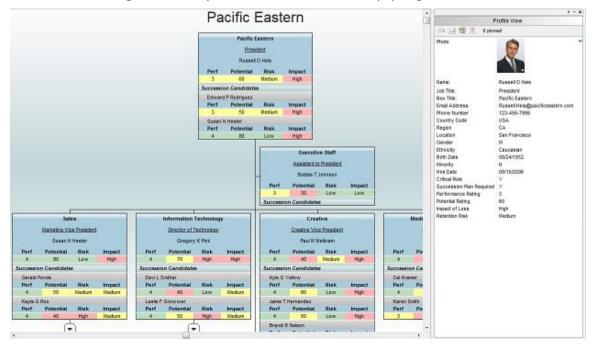


Figure 29.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 36: Hire Date
- Field 38: Birth Date
- Field 39: Gender
- Field 40: Ethnicity
- Field 46: Country Code
- Field 47: Region
- Field 48: Location
- Field 49: Email Address
- Field 50: Phone Number

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- Field 54: Critical Role
- Field 63: Performance Rating
- Field 64: Potential Rating
- Field 71: Impact of Loss
- Field 72: Retention Risk
- Field 77: Succession Plan Required

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Succession Ratings with Photos

Similar to the Succession Ratings org chart and formatted to display employee photos to visualize all employees with easy-to-follow, color-coded status indicators that rate the performance, potential, risk and loss impact of each employee and their successor candidate.

Drill up and down within the org chart to evaluate the organization's talent. Quickly identify high loss impact individuals to help put in retention plans. Identify high performers and identify those employees with lower ratings that may benefit from a develop program.

Desifie Eastern	4 × 8
Pacific Eastern	Profile View
Pacific Eastern	
Russell O Mois Part Potensial Hink Insant 3 65 Modum High	Profits Section Profits
Edward P Rodriguez	des Tés: Pacific Eastern Innal Address Rassell Heaggastitossifern.com Phone Number 123-456-7999 Ceantry Code USA
3 52 Machaev Huge	Regien CA Locatum San Francisco Gender H Unicity Caucasian
Ford Parental Risk housed	Birth Date 00/24/1952 Minority N Him Date 09/15/2006 Critical Role V
4 03 Low High Concertive Staff Assistant to Previous	stream voor Seccesse Ren Begunned Y Performanoe Rating 3 Voetnal Rating 60 monoct of Lass High Retentian Rask Hiedum
Darf Pohentiat Bias Inseast 3 20 Low Low Buocessers Cardolates	
Information Technology Creative Vise President Denoter of Media Planning & Ruging Denoter of Technology Denoter of Media	
er	

Figure 30.

Fields referenced in this Prebuilt Report template include:

- Field 1: Parent Box Unique Identifier
- Field 2: Box Unique Identifier
- Field 3: Box Title
- Field 5: Person Unique Identifier
- Field 6: Last Name
- Field 7: First Name
- Field 9: Job Number
- Field 10: Job Title
- Field 15: Photo
- Field 36: Hire Date
- Field 38: Birth Date
- Field 39: Gender
- Field 40: Ethnicity
- Field 46: Country Code
- Field 47: Region

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- Field 48: Location
- Field 49: Email Address
- Field 50: Phone Number
- Field 54: Critical Role
- Field 63: Performance Rating
- Field 64: Potential Rating
- Field 71: Impact of Loss
- Field 72: Retention Risk
- Field 77: Succession Plan Required

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