OrgPublisher Using Prebuilt Reports

Table of Contents

Introduction to Prebuilt Reports 4
Basic Input File Layout 5
Basic Category – Basic File Layout 6
Basic Chart 6
Directory Chart with Photos 7
Directory Chart 8
Print Chart 9
Contractors 10
Open Positions 11
Headcount Category – Basic Input File Layout 12
Headcount 12
Headcount with Span of Control 13
Planning Category – Basic Input File Layout 14
Successors 14
Succession Plan 15
Advanced File Layout 16
General Category – Advanced File Layout 17
Contact Information 17
Contractors 18
Directory 19
Open Positions 20
Org Chart 21
Org Chart with Profile 22
Org Chart with Photos 23
Printing 24
Management Category – Advanced File Layout 25
Head Count 25
Head Count with Open Positions 26
Span of Control Analysis 27
Planning Category – Advanced File Layout 28

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Head Count, FTE, Contractors 28
Salary and Head Count 29
Salary, Head Count, and Performance 30
Span of Control with Performance 31
Talent Review 32
Succession Category – Advanced File Layout 34
Succession 34
Succession Planning 36
Succession Ratings 38
Succession Ratings with Photos 40

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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, Top Support Documents 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 Modeling and Org Design Center.

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Basic Input File Layout

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

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

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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.

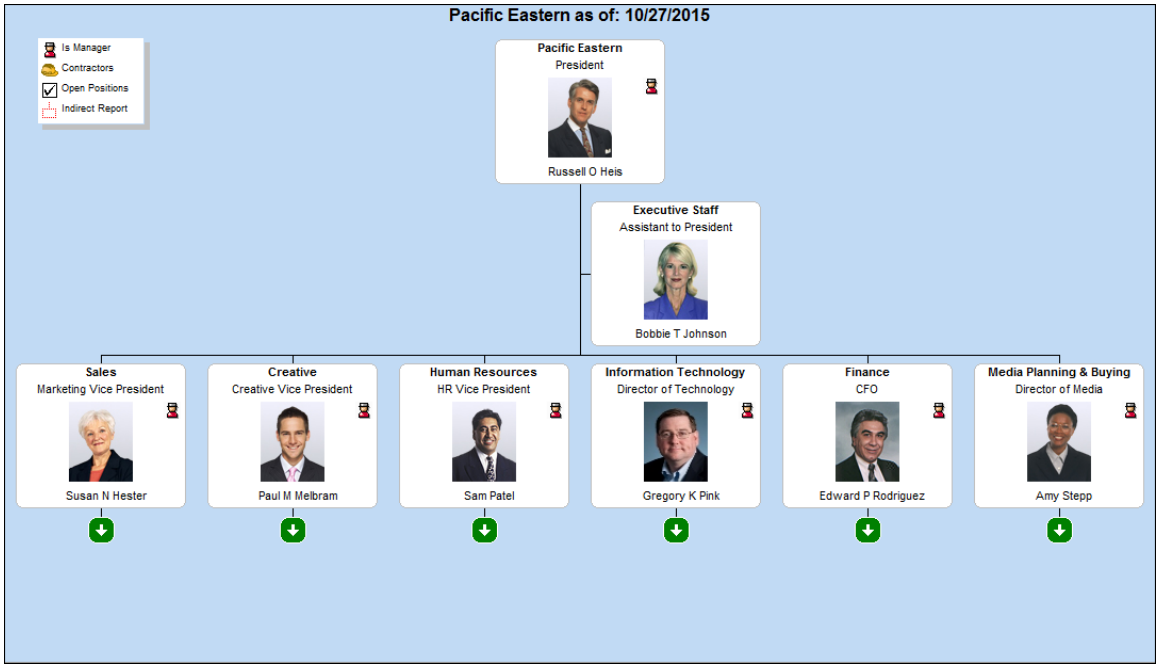

Figure 1.

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.

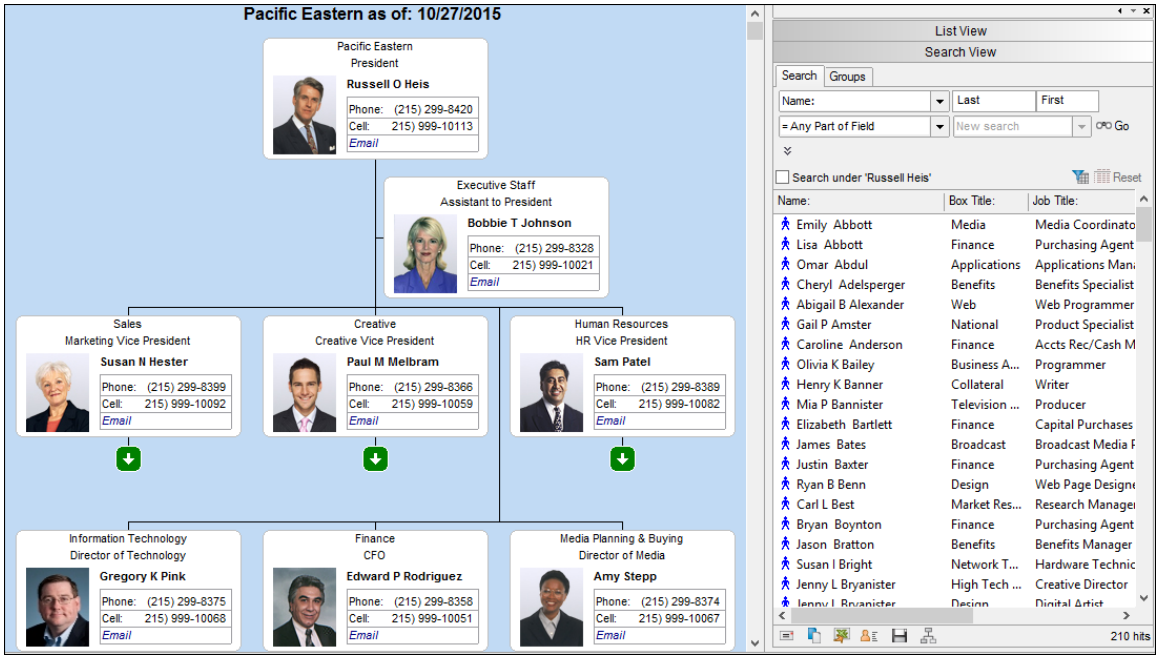

Figure 2.

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.

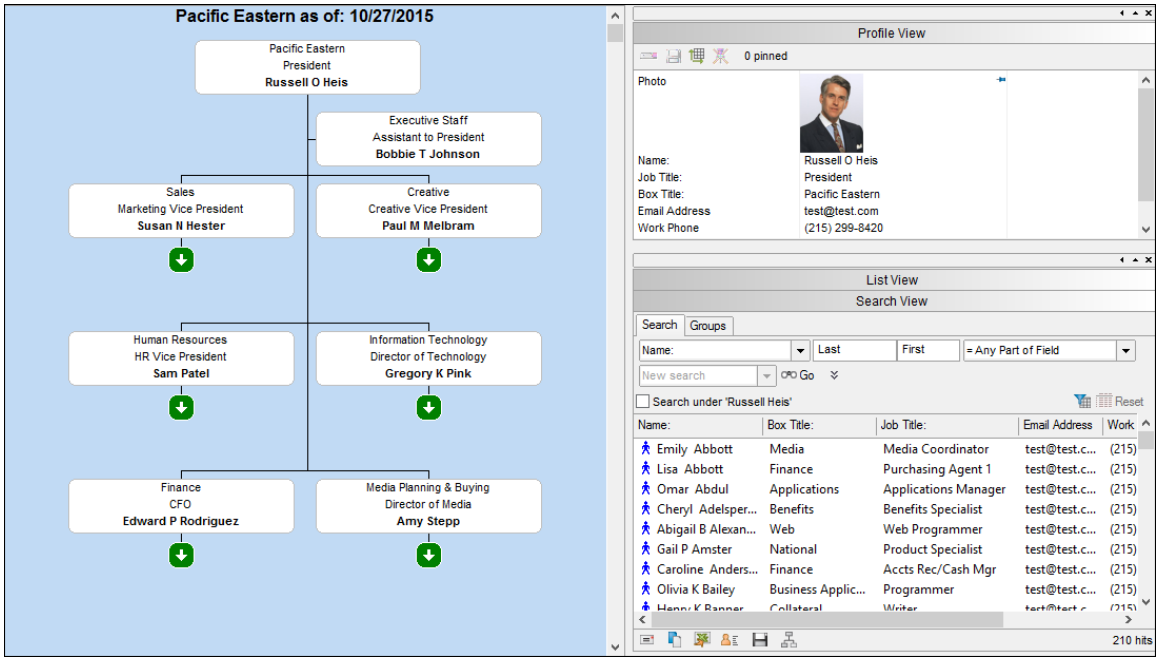

Figure 3.

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.

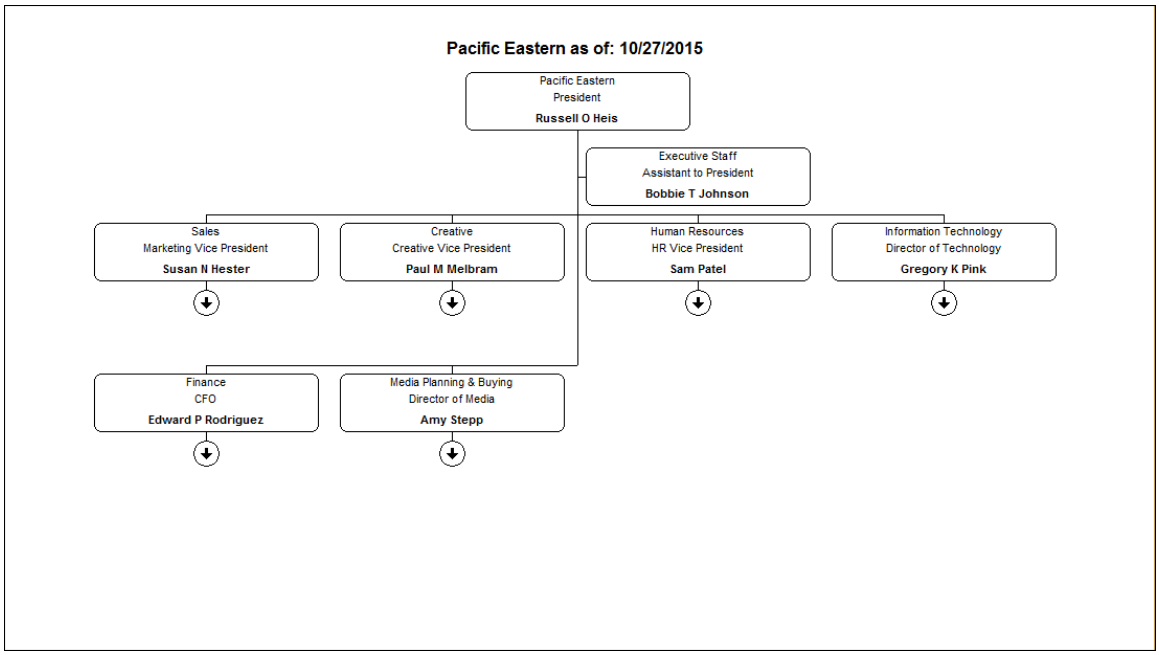

Figure 4.

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.

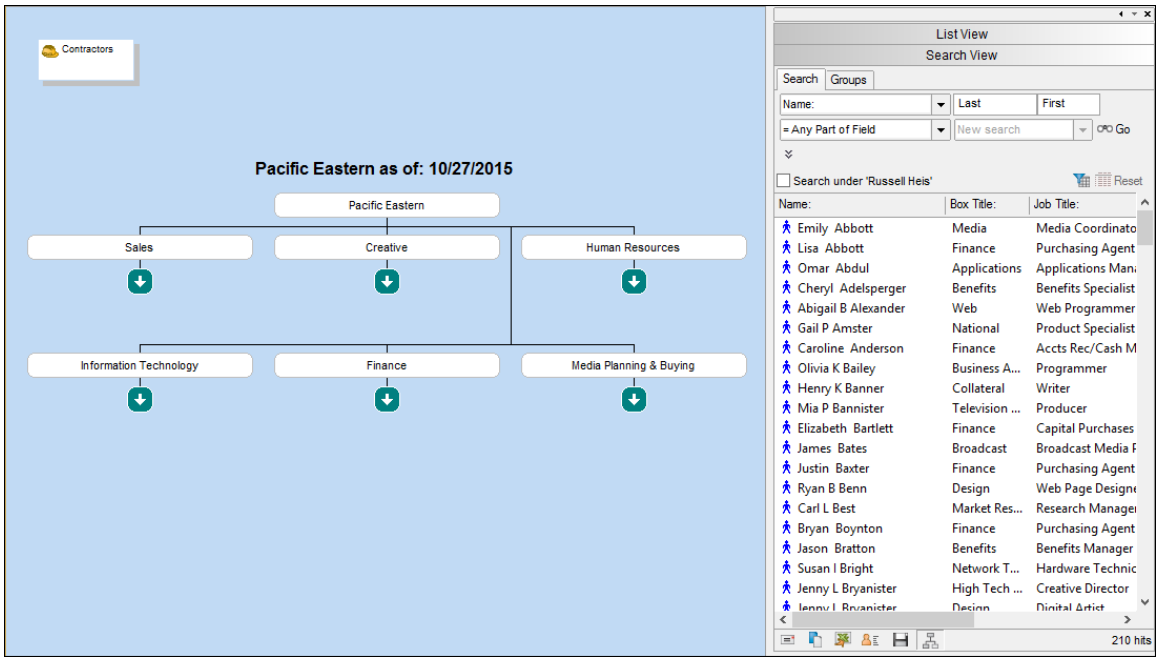

Figure 5.

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.

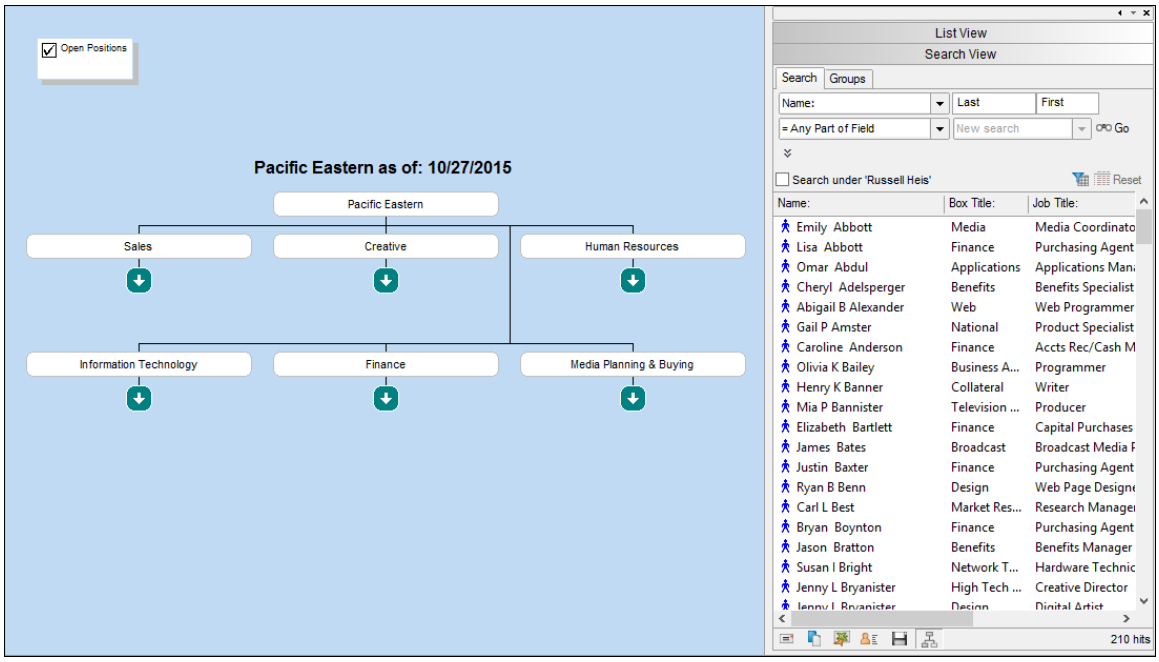

Figure 6.

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.

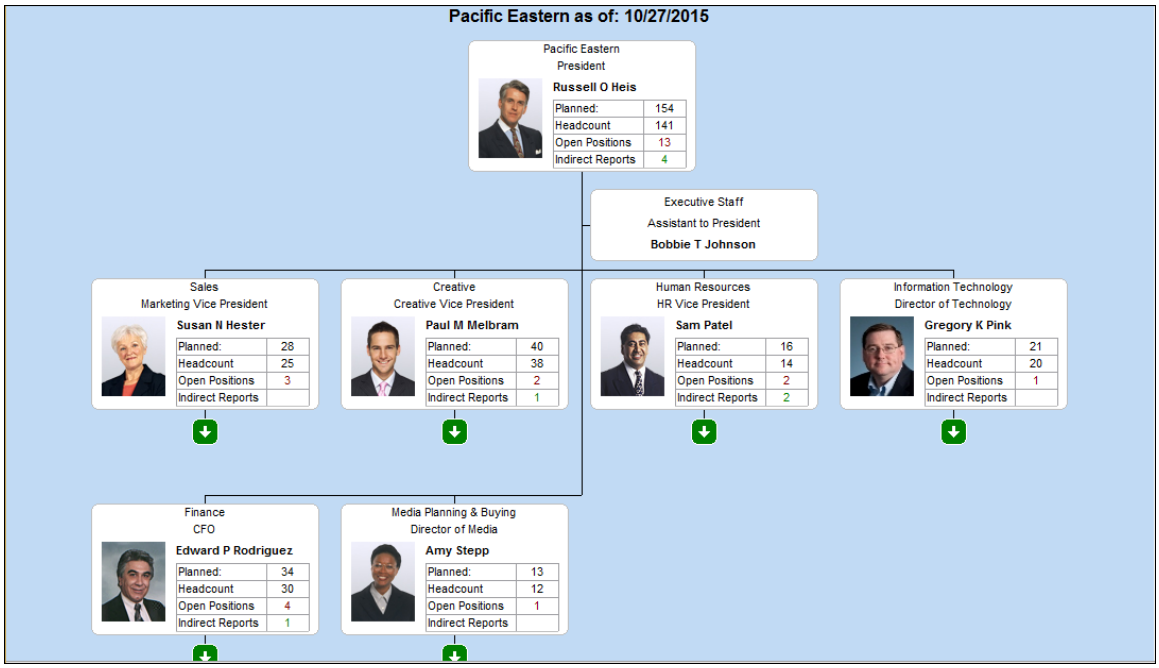

Figure 7.

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.

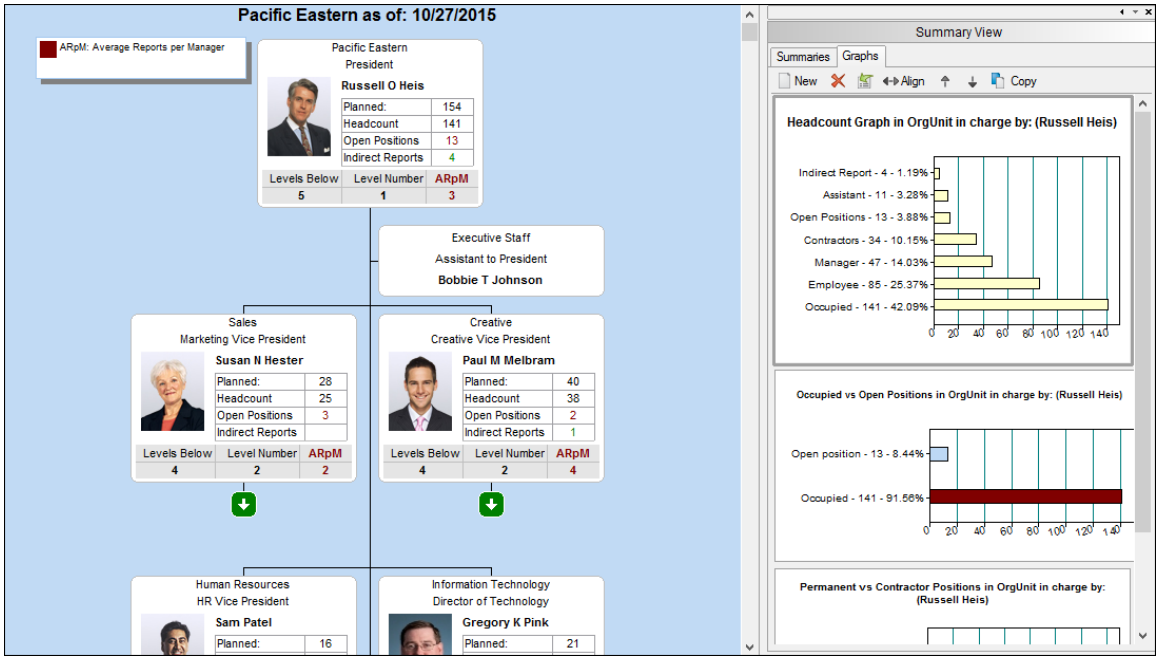

Figure 8.

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.

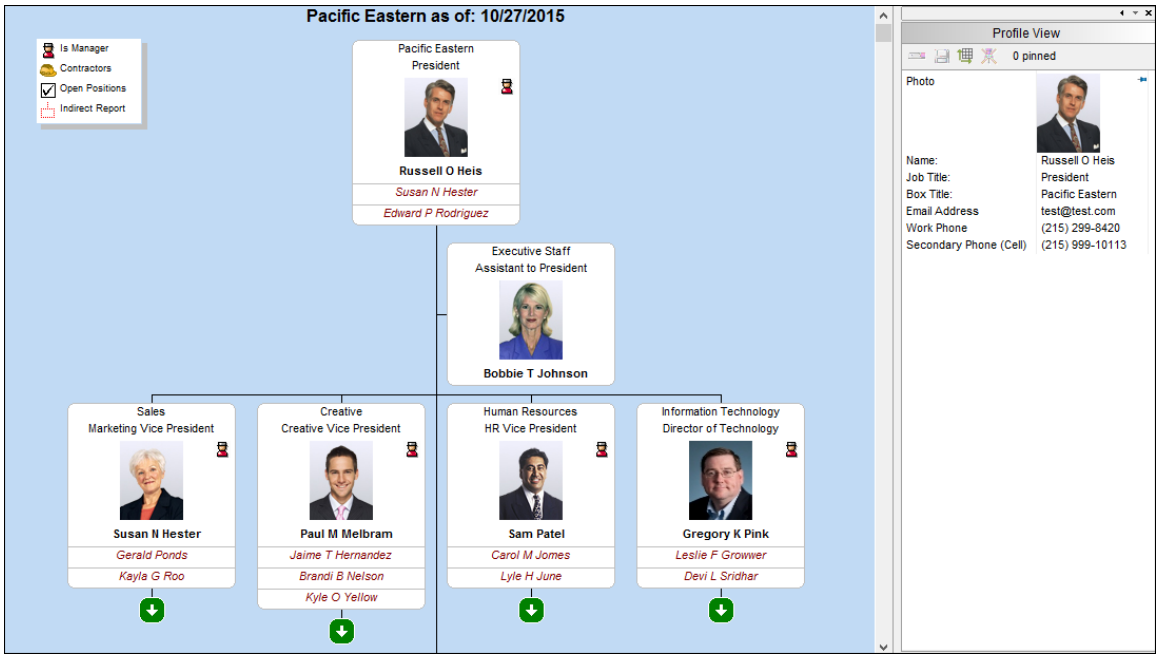

Figure 9.

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.

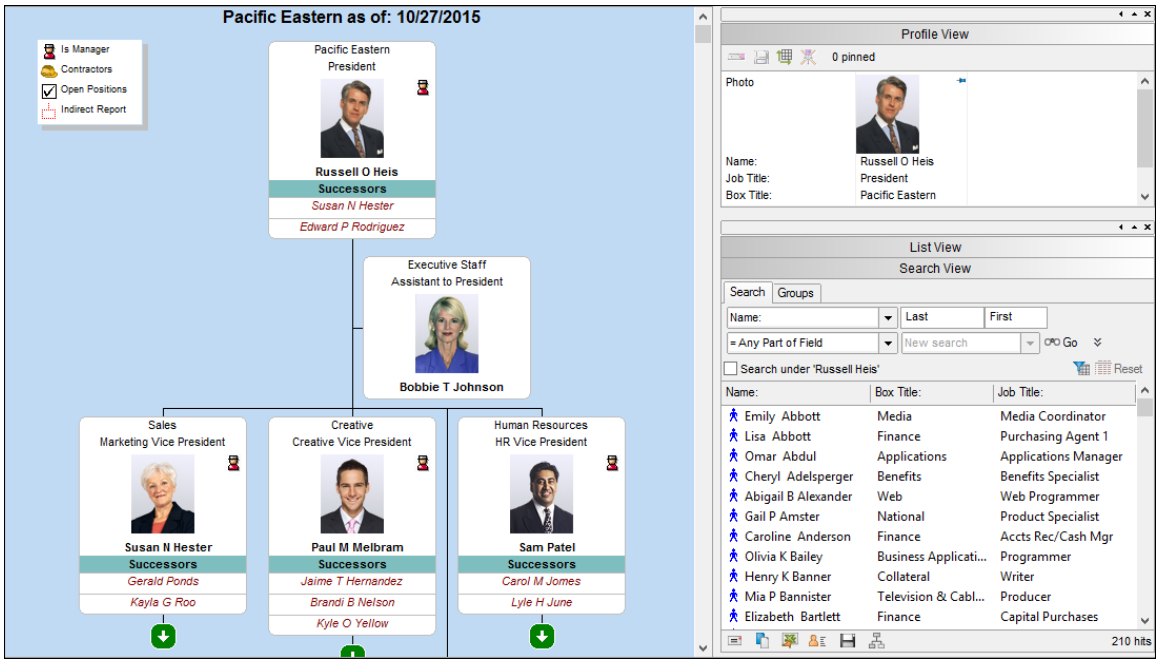

Figure 10.

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.

- General
  - Contact Information
  - Contractors currently on staff
  - Directory 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
- Management
  - 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
- Succession
  - Succession
  - Succession Planning
  - Succession Rating
  - Succession Rating with Photos

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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.

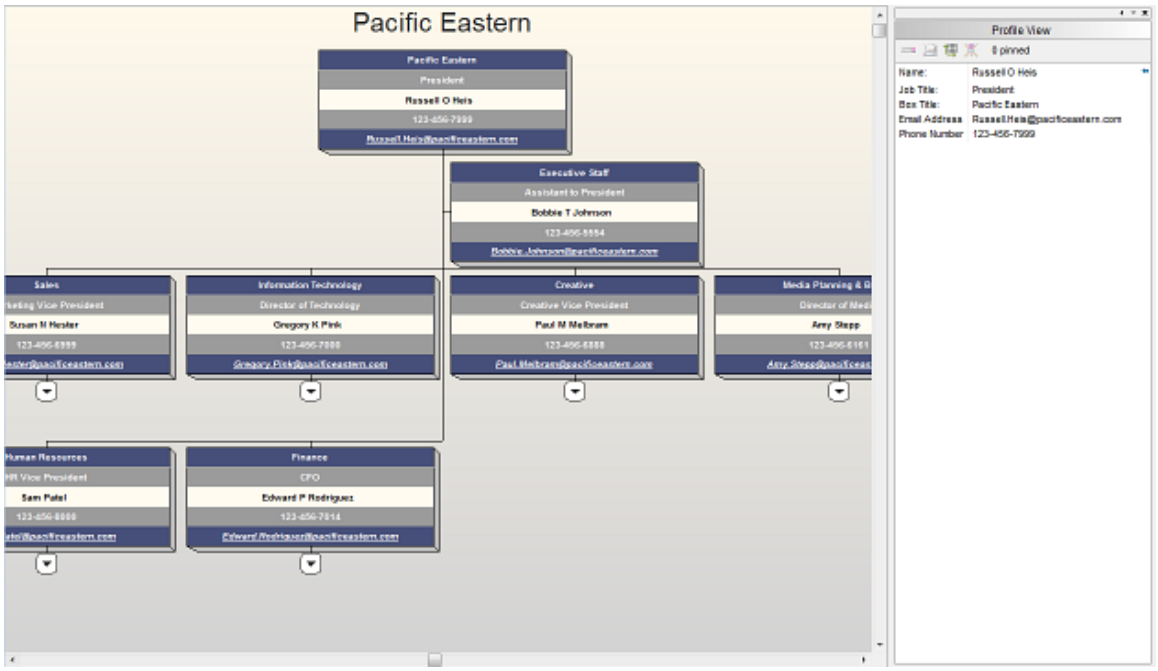

Figure 11.

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.

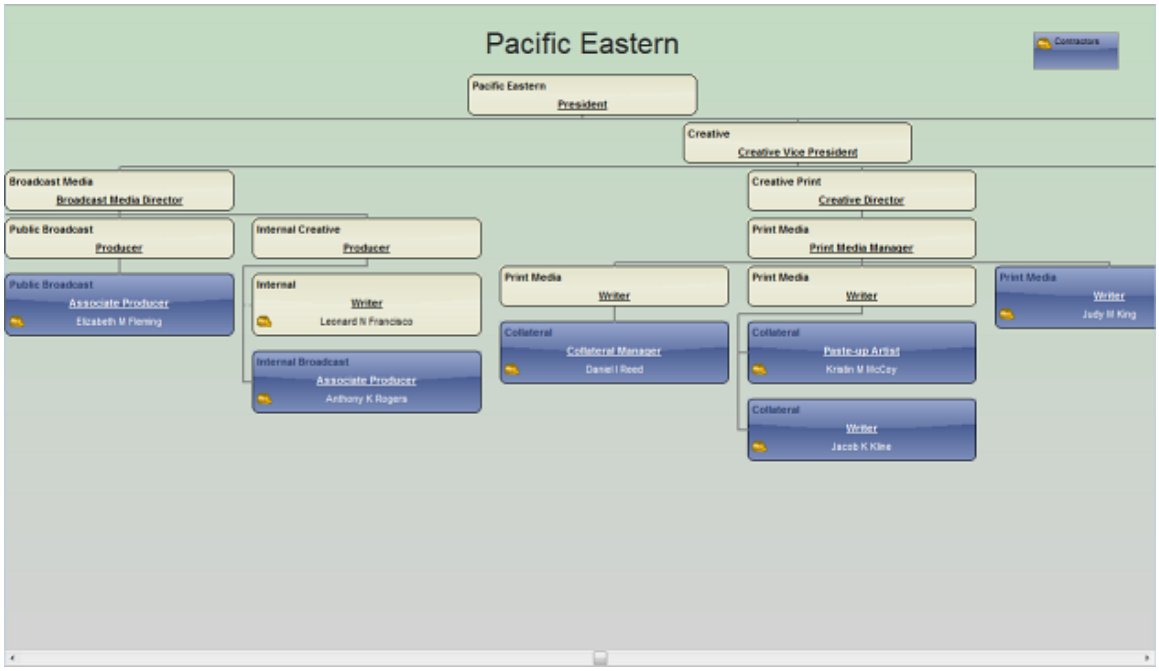

Figure 12.

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.

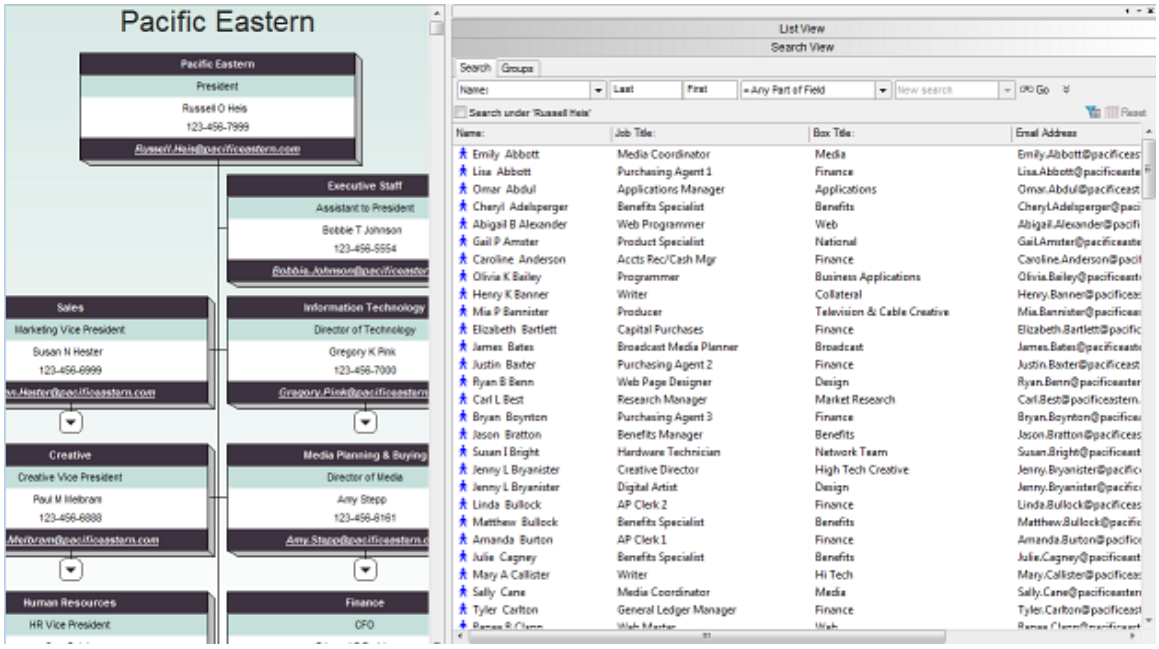

Figure 13.

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.

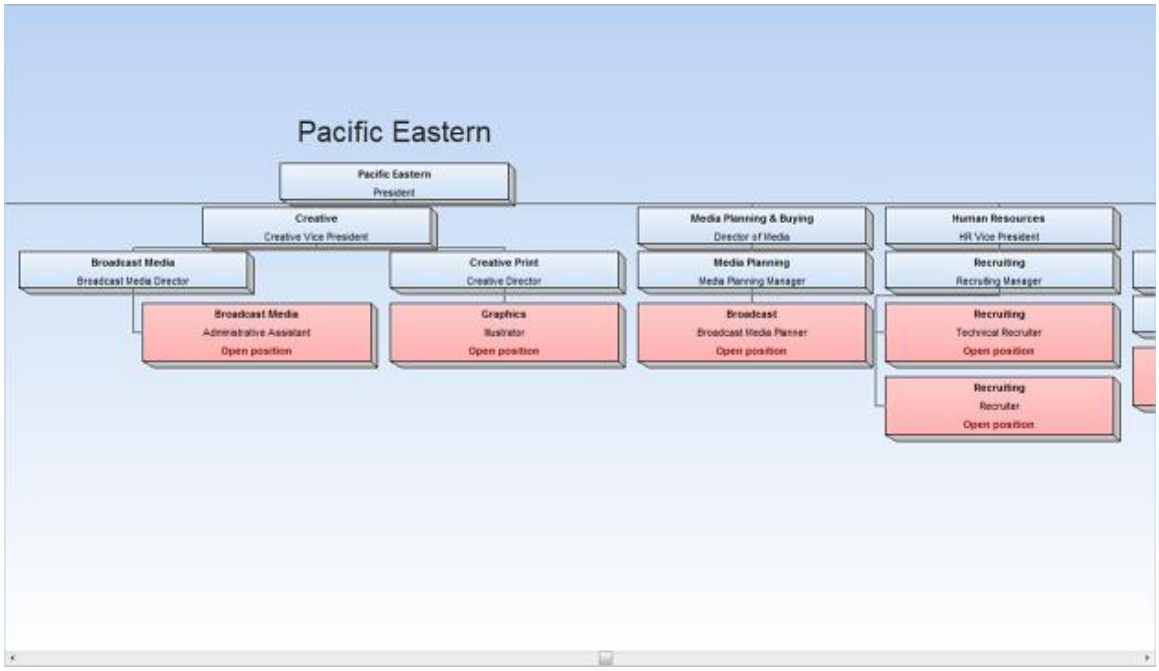

Figure 14.

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.

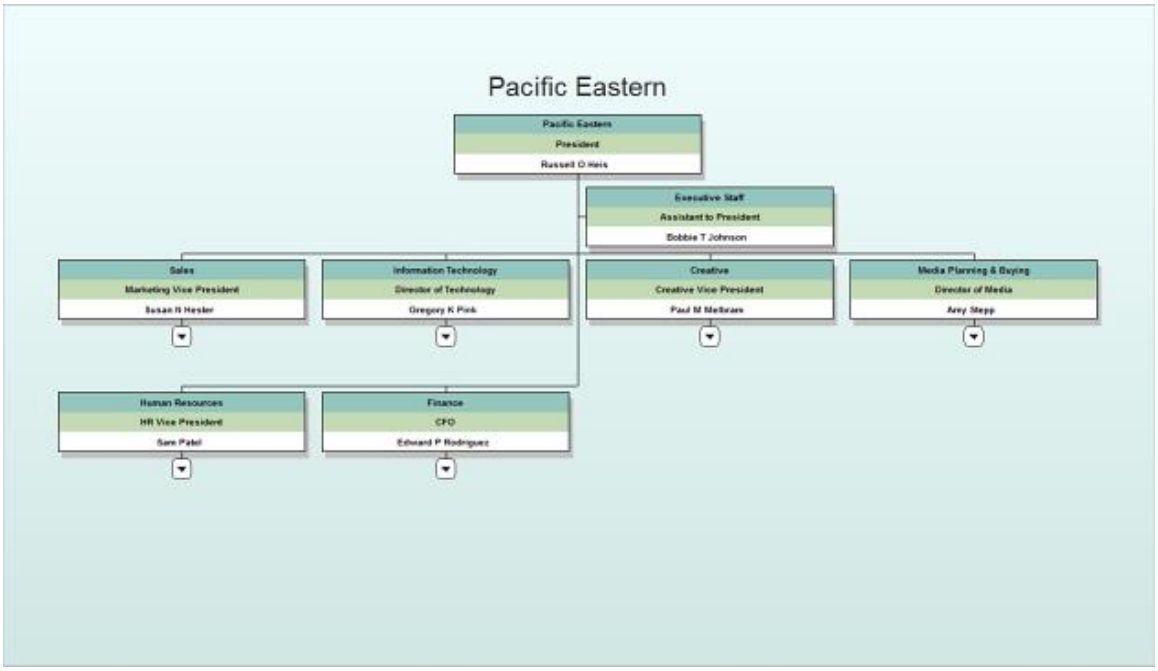

Figure 15.

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.

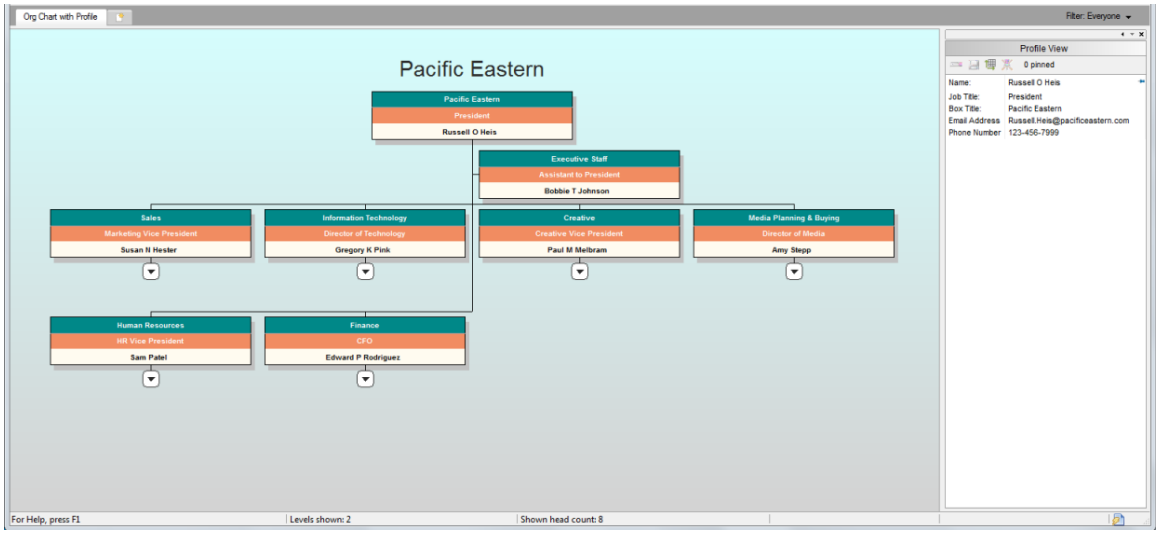

Figure 16.

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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Printing

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.

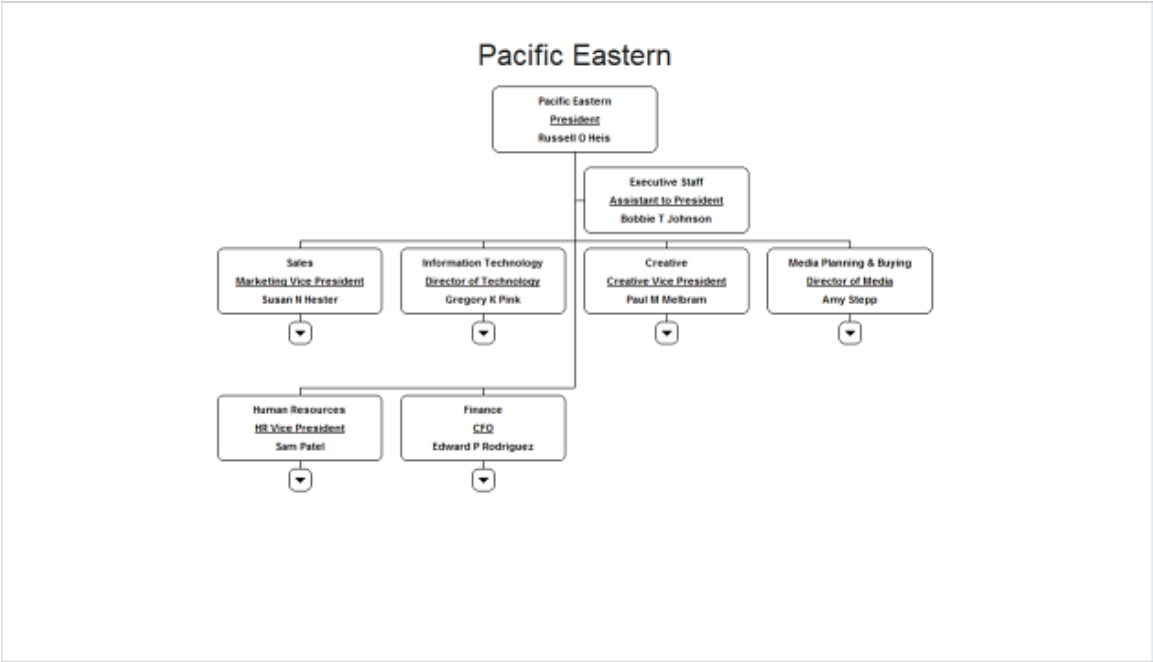

Figure 18.

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.

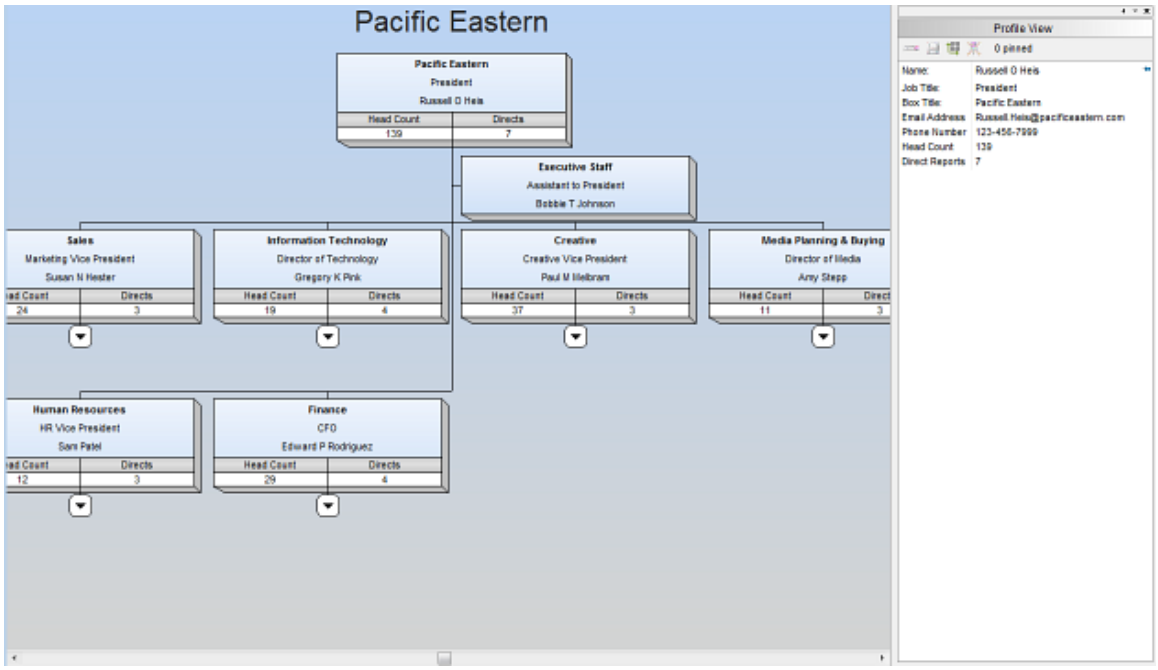

Figure 19.

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.

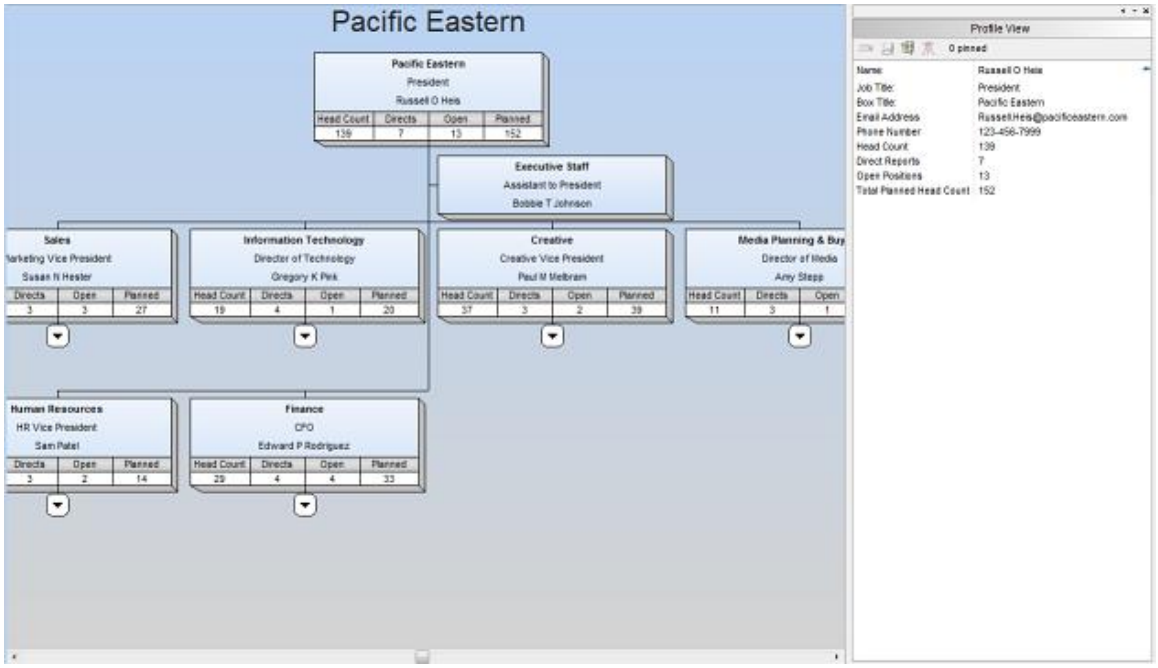

Figure 20.

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.

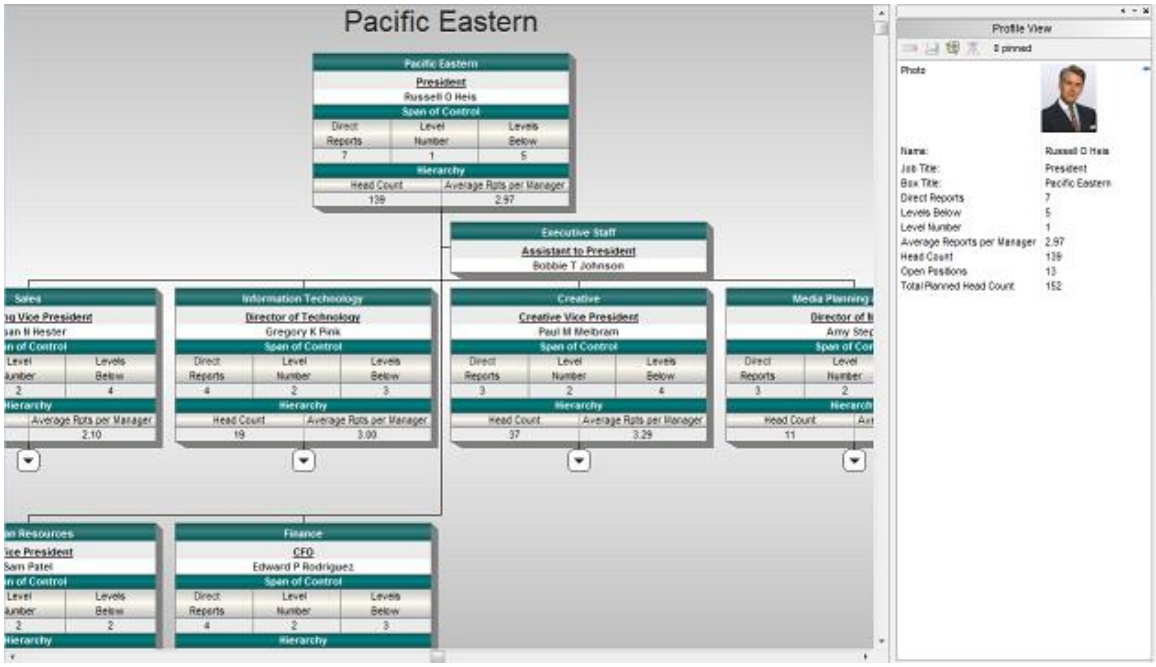

Figure 21.

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.

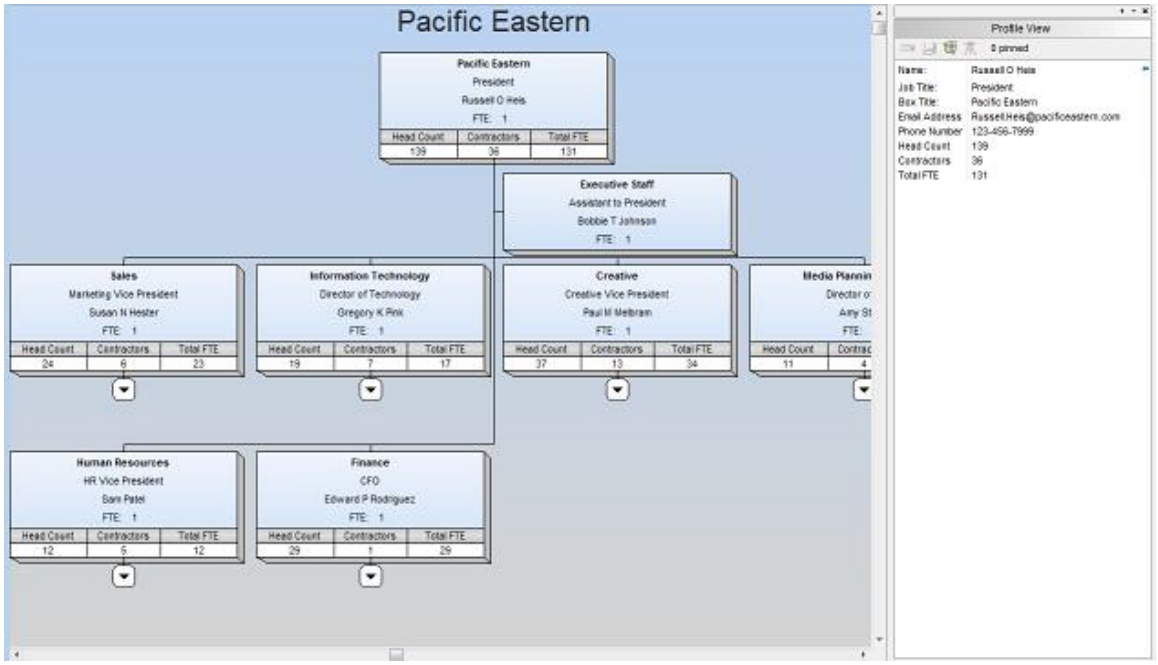

Figure 22.

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.

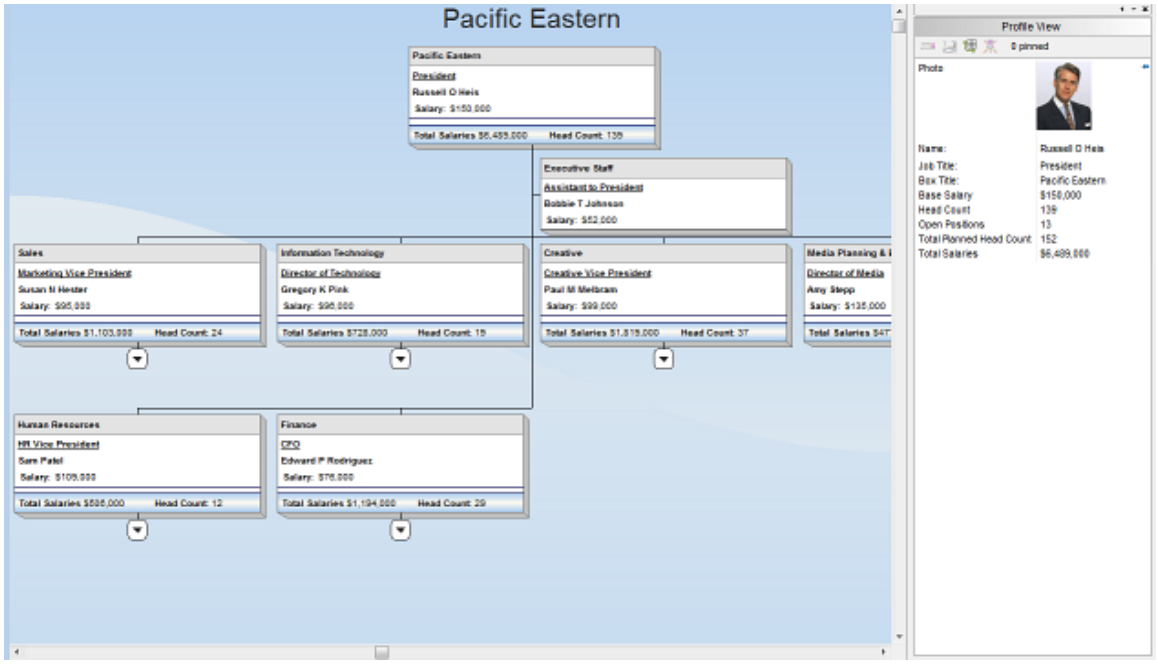

Figure 23.

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.

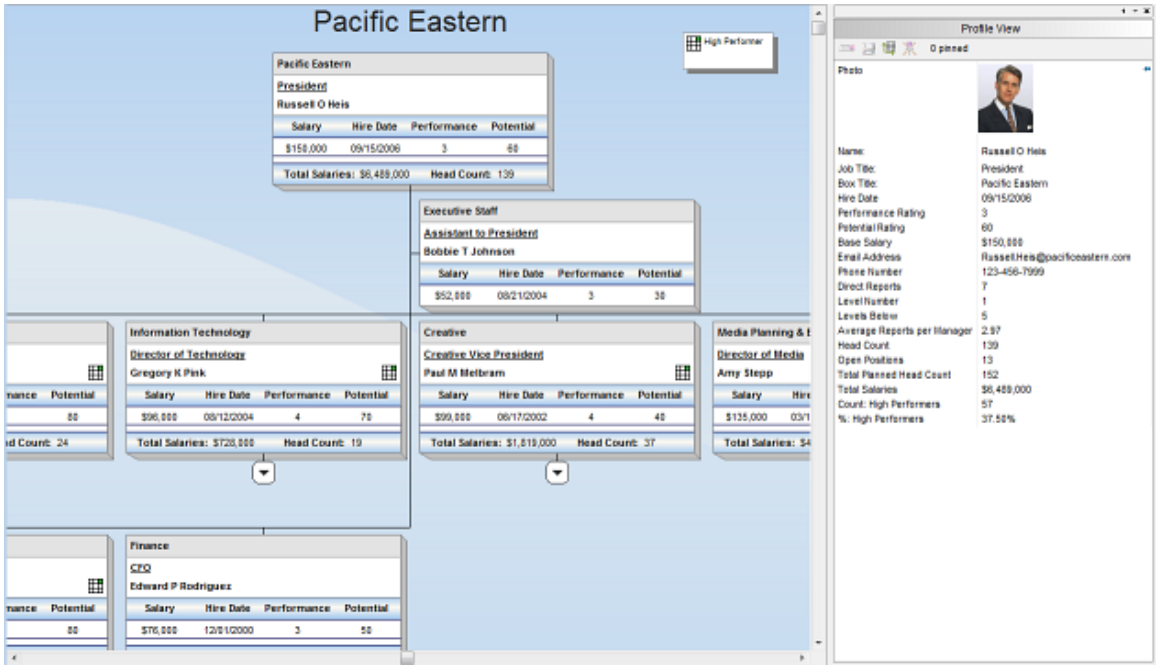

Figure 24.

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.

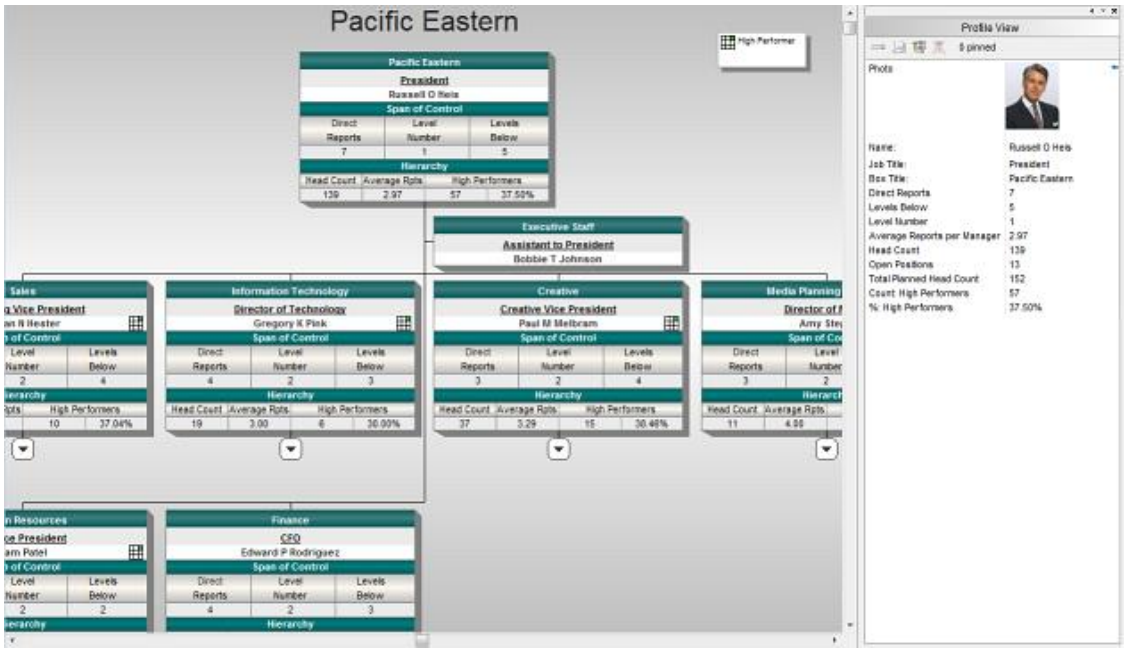

Figure 25.

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.

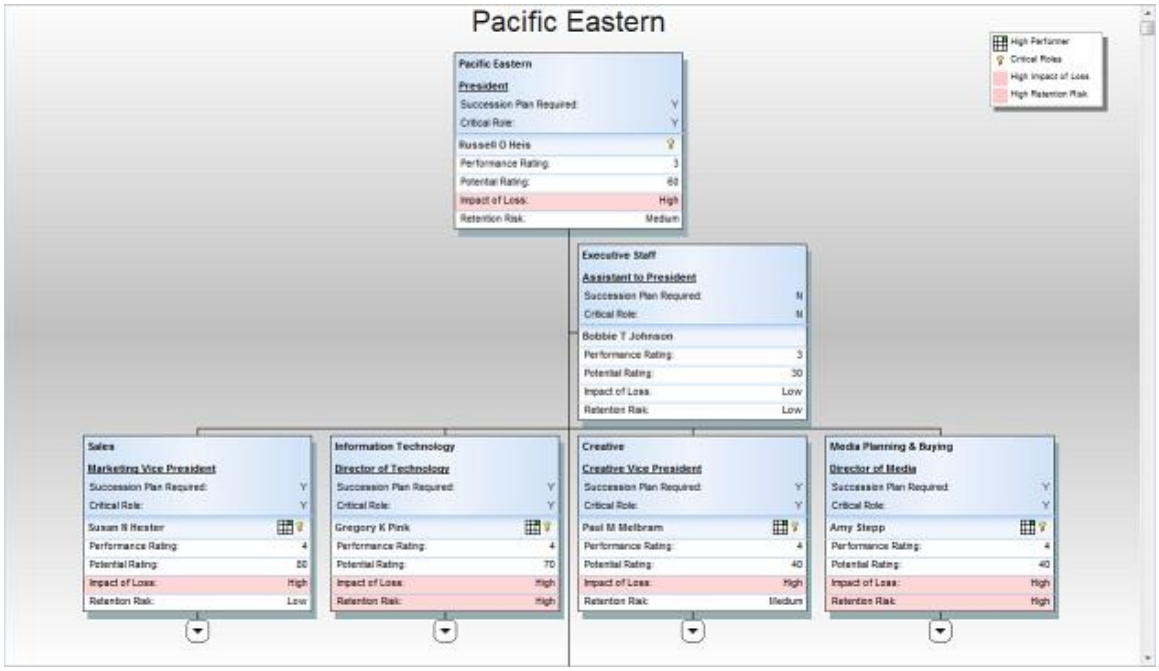

Figure 26.

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.

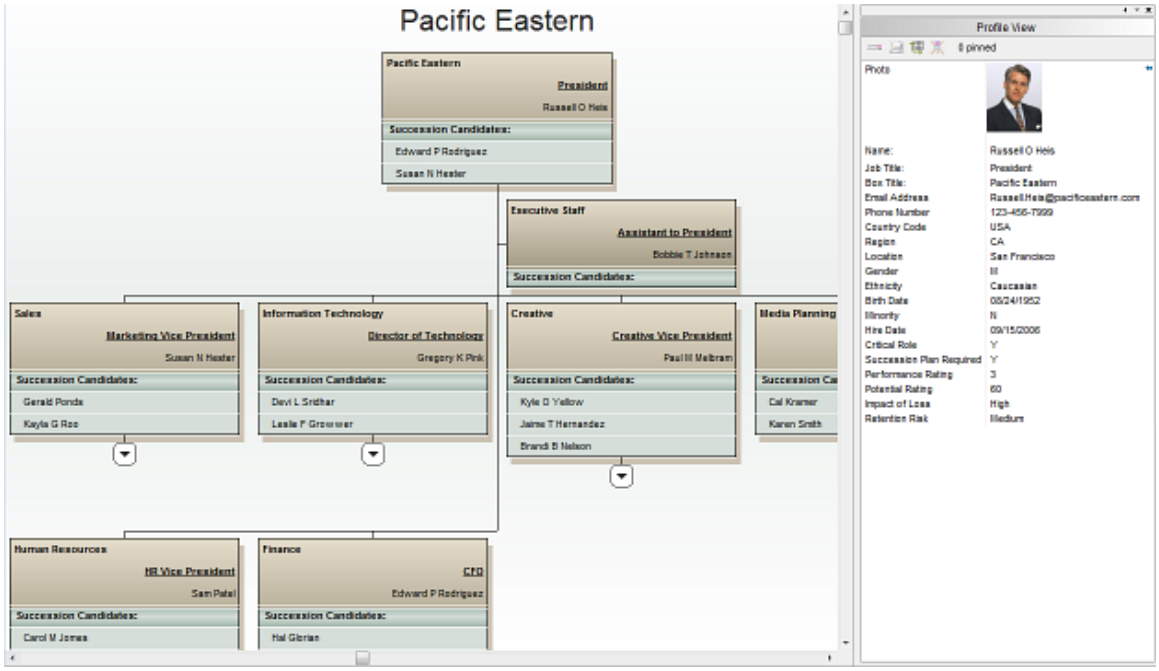

Figure 27.

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.

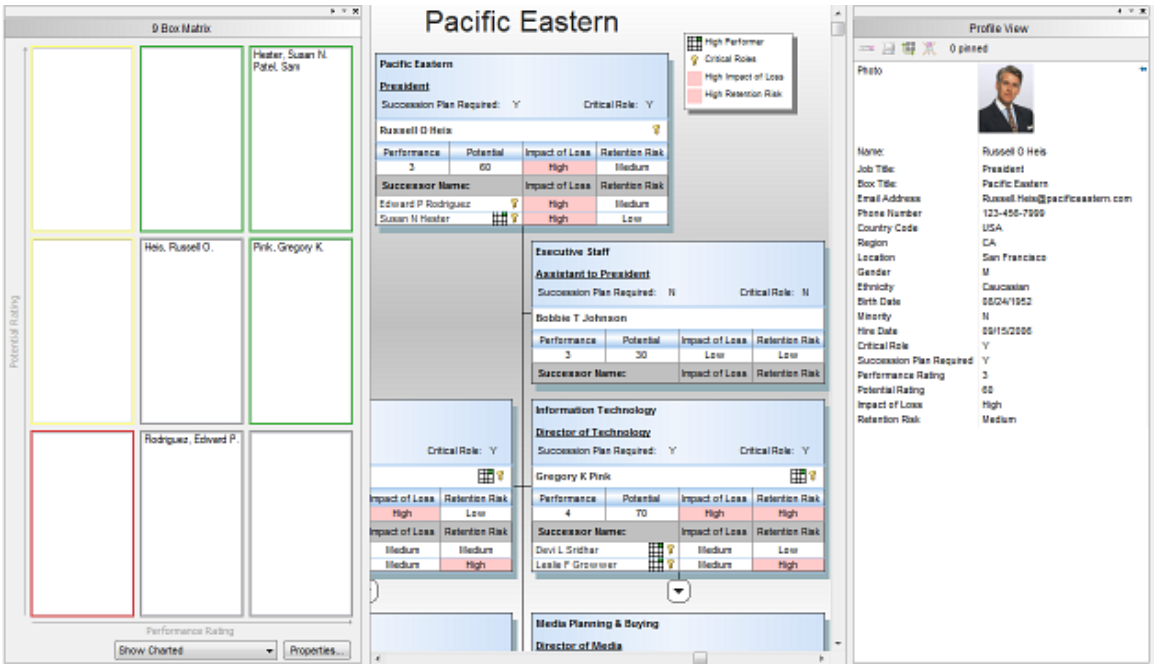

Figure 28.

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.

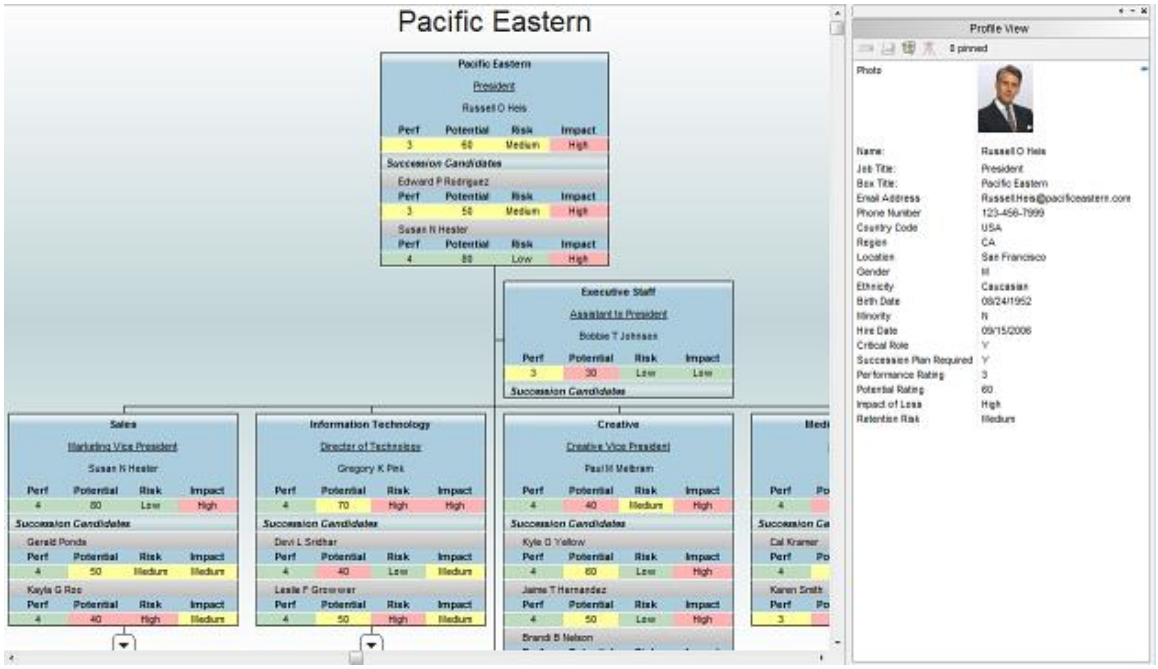

Figure 29.

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.

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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