

OrgPublisher Premier Levels and Span of Control



Table of Contents

| Levels and Span of Control | |
|--|---|
| Levels Defined | |
| Span of Control/Direct Reports3 | |
| Extended Span of Control/Hierarchy4 | |
| Top Record in Data Source4 | |
| Counts and Position Type Definitions6 | , |
| Displaying Level Number in Each Chart Box6 | , |
| Displaying Number of Levels Below the Chart Box7 | |
| Displaying Direct Report Count8 | |
| Summarizing Levels and Hierarchies9 | I |
| Creating Groups for Organization Levels10 |) |
| Using Level or Hierarchy Option with Groups13 | ļ |

Levels and Span of Control

Using the levels and span of control features enable you to:

- Add summary fields each level or span of control •
- Create a group for each level in the chart •
- Display a direct report count for each manager •
- Display the level number in each box •
- Display the number of levels below a selected box •

Levels Defined



Figure 1.

Span of Control/Direct Reports



Figure 2.

Copyright 2015, PeopleFluent. All rights reserved. Proprietary and confidential. PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 11/20/2015 3

Extended Span of Control/Hierarchy



Figure 3.

Top Record in Data Source

Levels are relative to the top box in the chart. If data passed into the chart begins at a President level, the President is marked as Level 1.

Top Record President



Figure 4.

Copyright 2015, PeopleFluent. All rights reserved. Proprietary and confidential. PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 11/20/2015 4



Top Record Vice President



Figure 5.

Publisher

Counts and Position Type Definitions

If you use position types in the chart data, span of control/direct report counts follow the count setting within the definition.

In the Define dialog below, the position types of Indirect Report, Contractor, and Successor are not included in the span of control/direct report counts. The Count field for each of these position types is No.

| 104 | sition type | Count | Priority | Record type | Group | Box type |
|--------|-------------|-------|----------|-------------|--------|----------------|
| Mana | ger | Yes | 0 | М | (None) | Normal |
| Emplo | yee | Yes | 1 | E | (None) | Normal |
| Assis | tant | Yes | 0 | A | (None) | Assistant |
| Contra | actor | No | 2 | C | (None) | Normal |
| Indire | ct Report | No | | | | |
| Open | position | Yes | | | | |
| Partne | er | Yes | 0 | PR | (None) | Partner |
| Staff | Function | Yes | 0 | <sf></sf> | (None) | Staff function |
| Succe | essor | No | 65535 | <sc></sc> | (None) | Normal |
| Presid | dent | Yes | 0 | <p></p> | (None) | Normal |
| Vice I | President | Yes | 0 | <vp></vp> | (None) | Normal |
| Direct | or | Yes | 0 | <d></d> | (None) | Normal |



Displaying Level Number in Each Chart Box

- 1. Create a custom field and assign the appropriate position types through the Assigned To field.
- 2. Set the custom field **Type** to **Level Number**, as shown in the figure below.

| Cust | om Field Properties | | | | | | X |
|------|-----------------------------|--|-----------------|-----------------|-----------------------|-------------------|-------|
| | Field label | Туре | Calc Field | Population | Assigned To | Sample | Seq. |
| | EmpID | Text | | | All Position Types | 19878 | 20 |
| | Level Within Organization | Level Number 💌 | | | All Position Types | 4 | 21 |
| | | Text Hotspot Numeric Currency Count Sum Average Minimum Maximum Percentage Date Email Postion ID | | | | I | |
| | Insert Delete | Level Number Levels Below | St Attachment F | ormula Security | View security summary | Search Properties | |
| ~ | Drag and Drop for All Posit | ion Types | | | | Close | Apply |

Figure 7.

PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 11/20/2015 6

The level number for the chart box, in relation to the total organization, appears in each box.



Figure 8.

Displaying Number of Levels Below the Chart Box

- 1. Create a custom field and assign the appropriate position types through the Assigned To field.
- 2. Set the custom field **Type** to **Levels Below**, as shown in the following figure.



Figure 9.





The number of levels below each chart box appears in the boxes.

Figure 10.

Displaying Direct Report Count

- 1. Create a custom field and assign to appropriate position types though the **Assigned To** field.
- 2. Set the custom field **Type** to **Direct Count**, as shown in the figure below.

| Custom Field Properties | | | | | | | | | | |
|-------------------------|-----------------------------|----------------|-----------------------------------|---------|----------|-----------------------|-------------------|-------|--|--|
| | Field label | Туре | Calc Field Population Assigned To | | | | Sample | Seq. | | |
| | EmpID | Text | | | | All Position Types | 19878 | 20 | | |
| | Level Within Organization | Level Number | | | | All Position Types | 4 | 21 | | |
| | Levels Below | Levels Below | | | | All Position Types | 0 | 22 | | |
| Þ | Direct Reports | Direct Count 💌 | | | | Mgr, Pre, Vic, Dir | | 23 | | |
| | | Text | | | | | | | | |
| | | Hotspot | | | | | | | | |
| | | Numeric | | | | | | | | |
| | | Currency | | | | | | | | |
| | | Count | | | | | | | | |
| | | Sum | | | | | | | | |
| | | Average | | | | | | | | |
| | | Minimum | | | | | | | | |
| | | Maximum | | | | | | | | |
| | | Percentage | | | | | | | | |
| | | Date | | | | | | | | |
| | | Email | | | | | | | | |
| - | | Position ID | | | | | | | | |
| | Insert Delete | Direct Count | ot Attachment | Formula | Security | View security summary | Search Properties | | | |
| • | Drag and Drop for All Posit | Levels Below | | | | | Close | Apply | | |

Figure 11.

Copyright 2015, PeopleFluent. All rights reserved. Proprietary and confidential.

PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 11/20/2015 8



Direct reports for each Manager, Director, Vice President, and President display in their chart boxes. For example, Paul Melbram has three direct reports in the figure below.



Figure 12.

Summarizing Levels and Hierarchies

When you create summaries on the custom field types of **Count**, **Sum**, or **Average**, you can choose to summarize on **Hierarchy** or **Level**. In the figure below, the **Count** type is selected for the custom field Count on Level. The Count on field is available and defaults to Hierarchy.

| stom Field Properties | | | | | | |
|-------------------------------|--------------|---------------|--------------------------|-----------------------|-------------------|-------|
| Field label | Туре | Calc Field | Population | Assigned To | Sample | Seq. |
| EmplD | Text | | | All Position Types | 19878 | 20 |
| Level Within Organization | Level Number | | | All Position Types | 4 | 21 |
| Levels Below | Levels Below | | | All Position Types | 0 | 22 |
| Direct Reports | Direct Count | | Total Head Count | Mgr, Pre, Vic, Dir | 4 | 23 |
| Count on Level | Count | | Total Head Count | Mgr, Pre, Vic, Dir | | 24 |
| | | | | 1 | | |
| Insert Delete | Format Hotsp | ot Attachment | Formula Security | View security summary | Search Properties | |
| Z Drag and Drop for All Posit | ion Types | Count on: H | lierarchy 🔽 lierarchy | | Close | Apply |
| | Broadcast Me | edia | evel h? | High | Tech Creative | |

Figure 13.

PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 9 11/20/2015



The following figure indicates a selected box, Paul Melbram within a red box. With the Count on field set to Level, the resulting count is 7.



Figure 14.

When the **Count on** field is set to **Hierarchy**, the count is **63**. Paul Melbram's span of control, or hierarchy, is highlighted in the figure below.





Creating Groups for Organization Levels

Additional calculations by Level can be made by creating a group for each level in the organization. For example, to display the total salary for each level in the Summary View graph, a group is created.

A search was conducted on the custom field, Level Within Organization, for level 2, using the All Fields tab in the Search dialog.

The figure below shows the custom field selected, Level Within Organization, searching For a Match that must equal 2.

PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 11/20/2015 10

)rgPublisher

The group is saved as Level 2.

| r | | | | | | |
|-------------------------------------|----------------|------------------------------------|--|-------------|---------------------|----------------------|
| Search | e All Fields G | roups | | | | |
| Search Level Within Organization | | T | | | Search Now Close | |
| For 2 Match = Equal to | | Search of Sear Select New | options ch under cted box Search t er a group nam | e | | |
| Name: | Job Title: | Box Title: | EmolD | F | Please enter a name | e for the new group: |
| Susan Hester | Marketing Vi | Sales | 4958 | | Level 2 | |
| Raymond Jessup | CFO | Finance | 20029 | 2 [| ОК | Cancel |
| * Bobbie Johnson | Assistant to | Executive S | 0505 | 2 | | |
| 📌 Paul Melbram | Creative Vic | Creative | 9822 | 2 | 4 | uman Resources |
| ¢ Gregory Pink ◀ | Director of | Information | 3592 | 2 | 3 | HR Vice President |
| 7 people found | | | Сору 🎉 | Microsoft E | xcel 📙 Save as | this Occasization |

Figure 16.

The Summary View, shows the **Count** by level for the custom field **Max Salary by Level**.

| Summaries | Graphs | |
|---------------|--------|------------------------|
| 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 |

Figure 17.

The **Graphs** tab, in the following figure, displays the visual of the summary information for levels and max salary.



Figure 18.

Copyright 2015, PeopleFluent. All rights reserved. Proprietary and confidential. PeopleFluent and the PeopleFluent and OrgPublisher logos are trademarks or registered trademarks of PeopleFluent. All other brand and product names are trademarks or registered trademarks of their respective holders. 11/20/2015 11



When drilling up or down within the chart, the graph totals reflect the expanded span of control (currently displayed hierarchy).



Figure 19.

Using Level or Hierarchy Option with Groups

Publisher

Using a group as the population for a custom field can provide more summary options. The figure below shows Level 5 Count in Hierarchy is selected with the custom field Type of **Count** for the **Hierarchy** with a **Population** of the associated group, **Level 5**.

| C | Custom Field Properties | | | | | | | | | | |
|---|-------------------------|-----------------------------|--------------|----------------|------------------|-----------------------|-------------------|-------|--|--|--|
| | | Field label | Туре | 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 | | | |
| н | | Max Salary by Level 6 | Maximum | Salary: | any: Level6 | All Position Types | 0 | 30 | | | |
| L | ▶ | Level 5 Count in Hierarchy | Count | - | Level 5 | All Position Types | 0 | 31 | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| 1 | | | | | | | | | | | |
| | | Insert Delete | Format Hotsp | oot Attachment | ormula Security | View security summary | Search Properties | | | | |
| | ~ | Drag and Drop for All Posit | ion Types | Count on: Hie | erarchy 💌 | | Close | Apply | | | |

Figure 20.

The results shown in the chart boxes in the figure below indicate that Gregory Pink has 8 employees in Level 5 in his hierarchy, or span of control. Paul Melbram has 48 employees in Level 5 in his hierarchy. Amy Stepp has no employees in Level 5 within her hierarchy.



Figure 21.