



OrgPublisher Premier Levels and Span of Control

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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

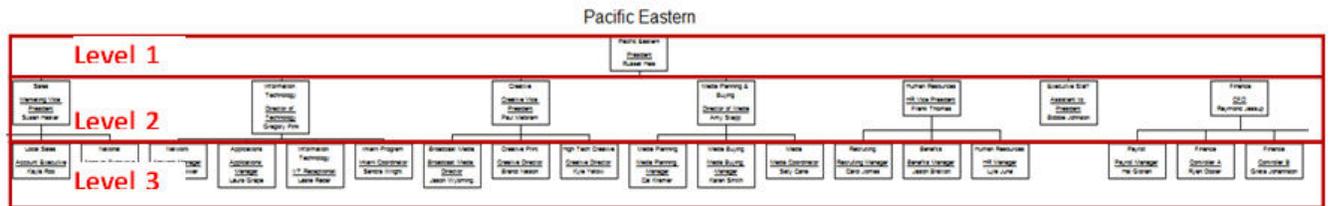


Figure 1.

Span of Control/Direct Reports

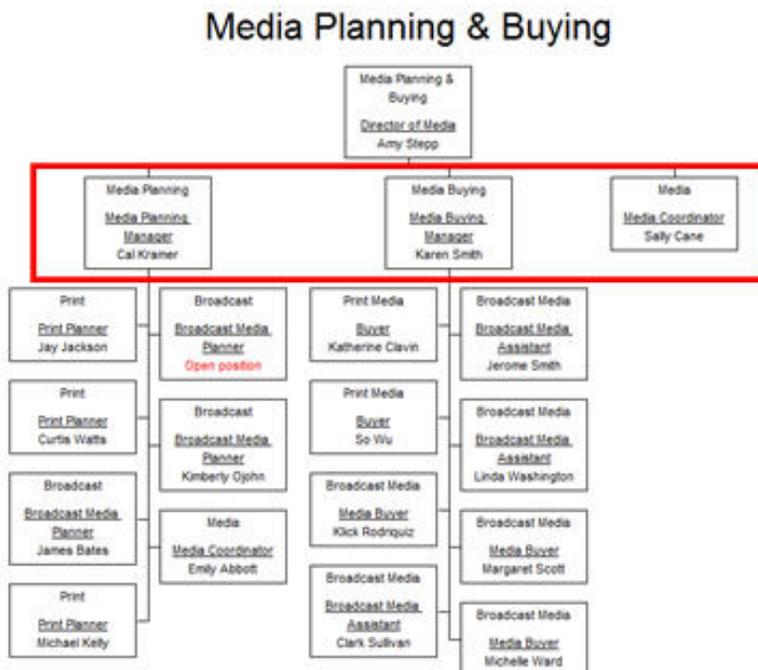


Figure 2.

Extended Span of Control/Hierarchy

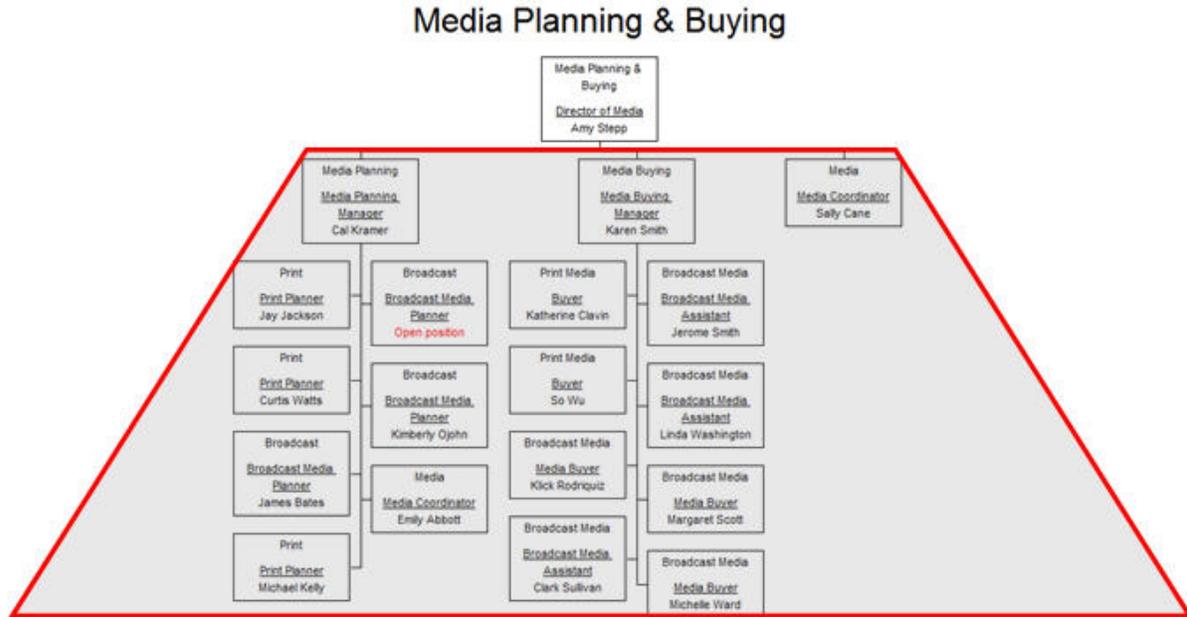


Figure 3.

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

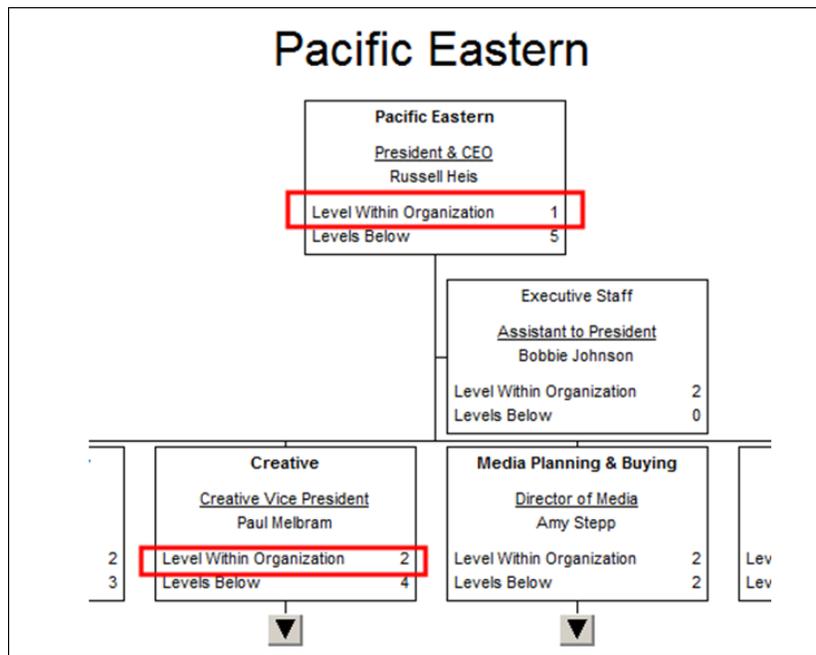


Figure 4.

Top Record Vice President

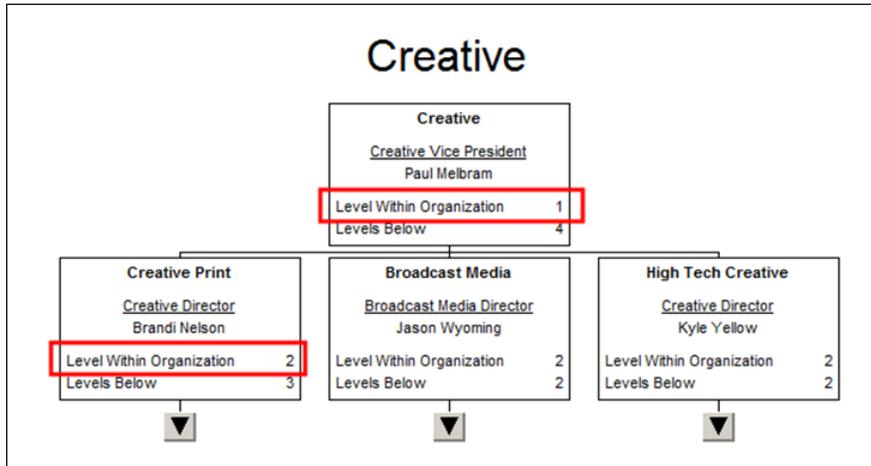


Figure 5.

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**.

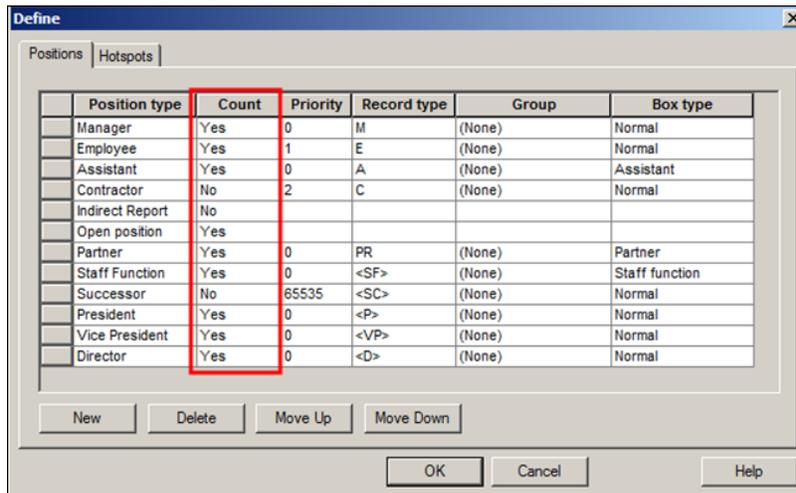


Figure 6.

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.

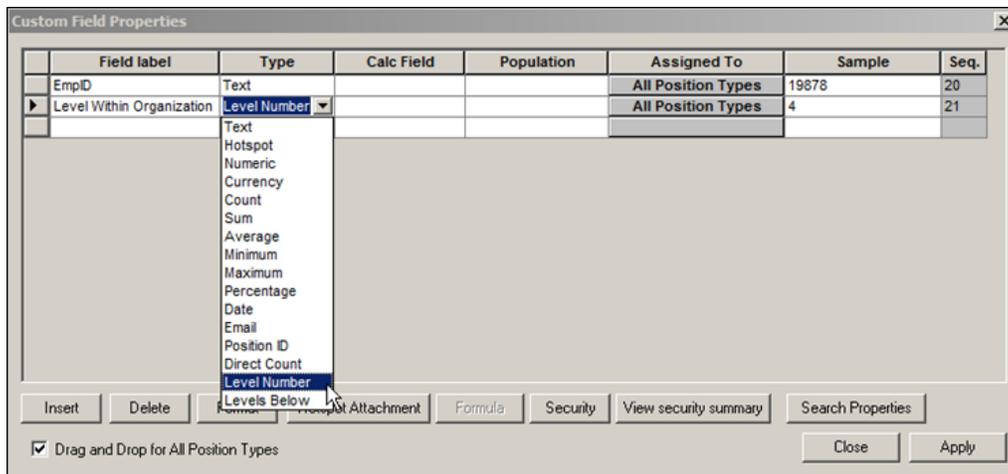


Figure 7.

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

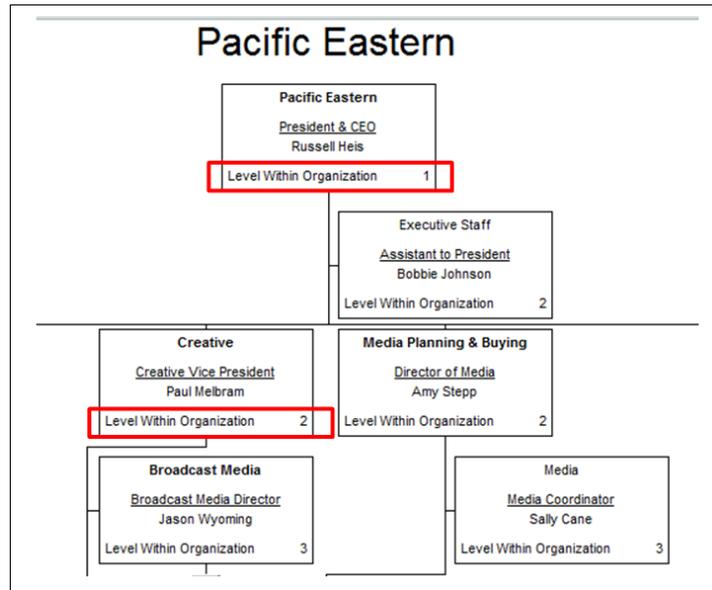


Figure 8.

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.

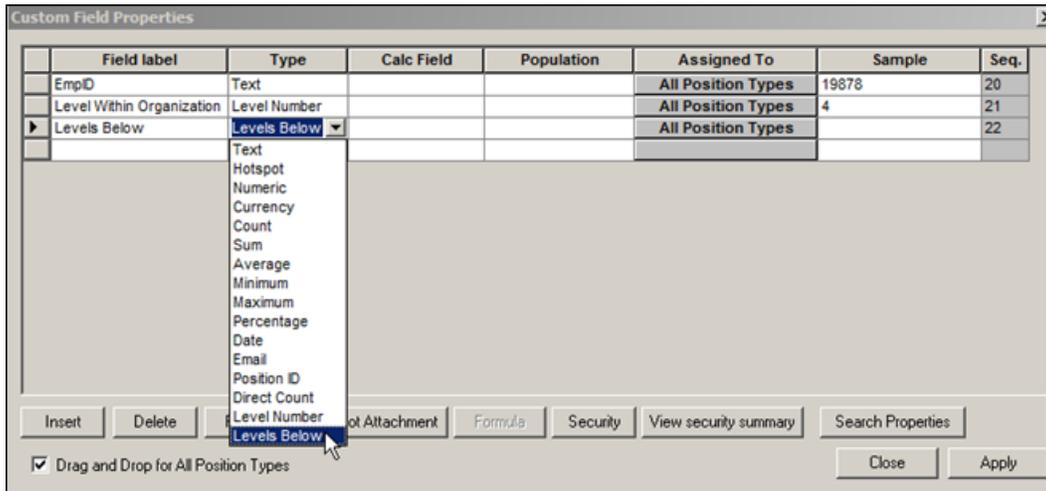


Figure 9.

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

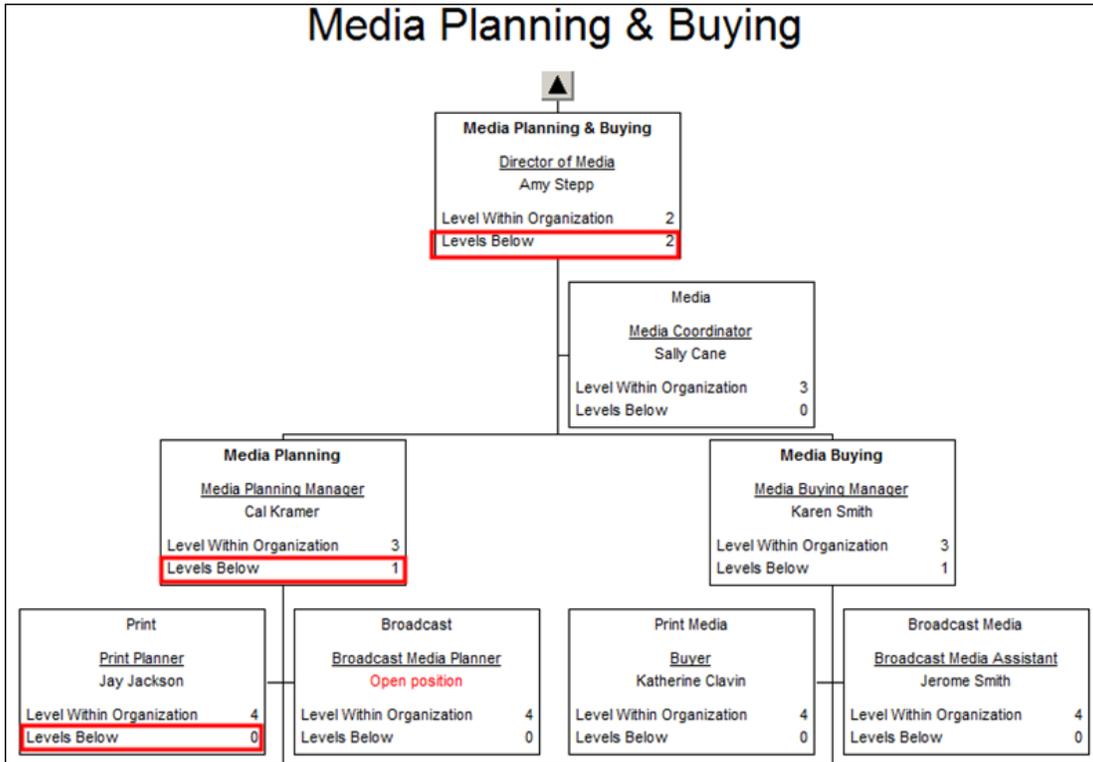


Figure 10.

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.

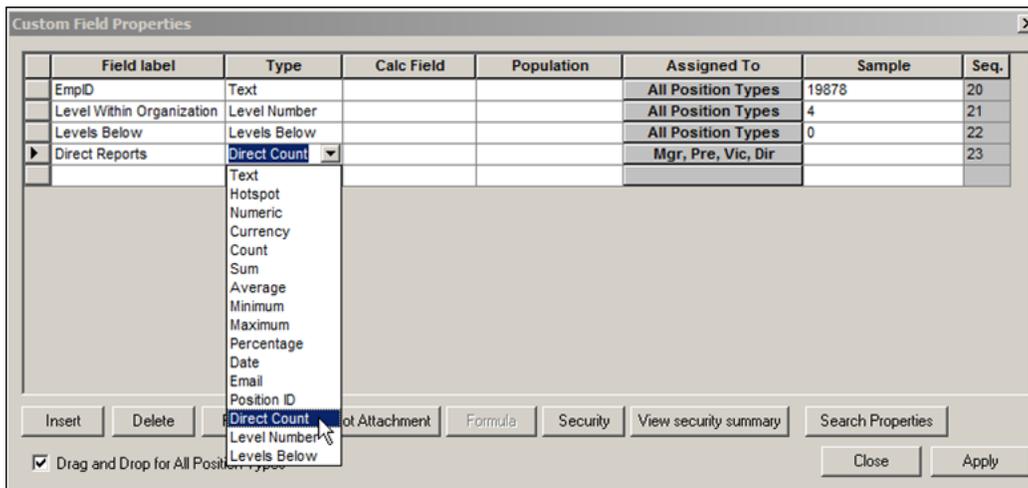


Figure 11.

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.

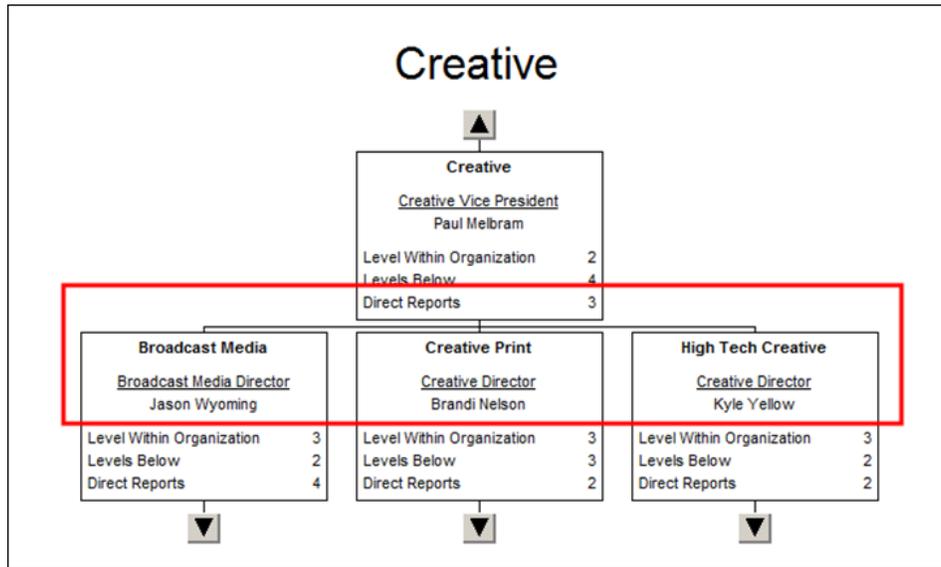


Figure 12.

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**.

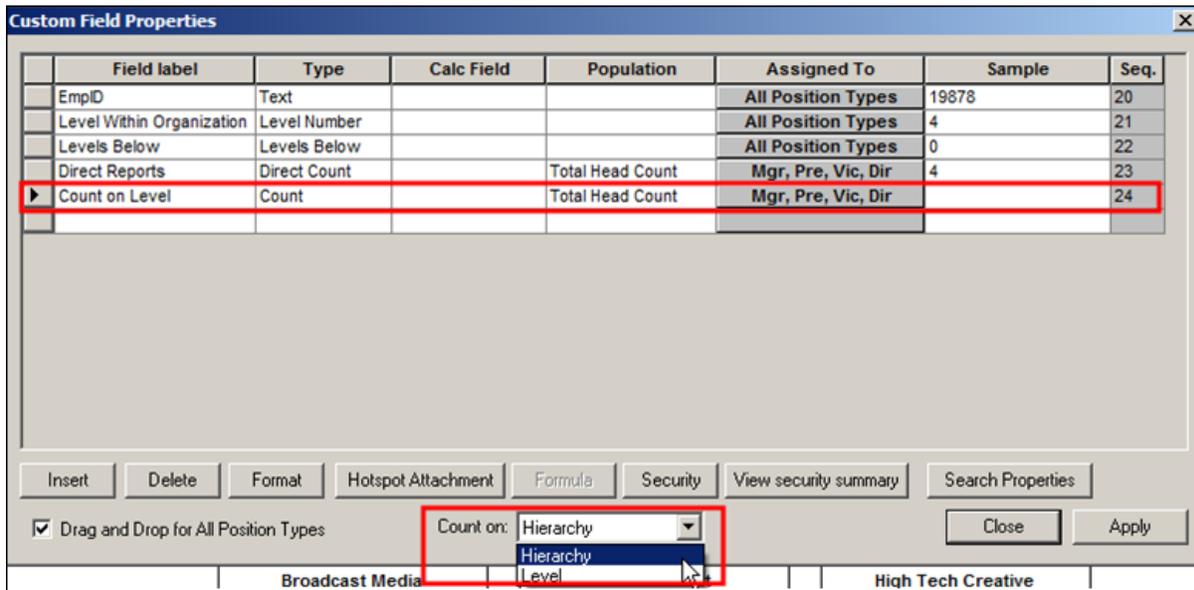


Figure 13.

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**.

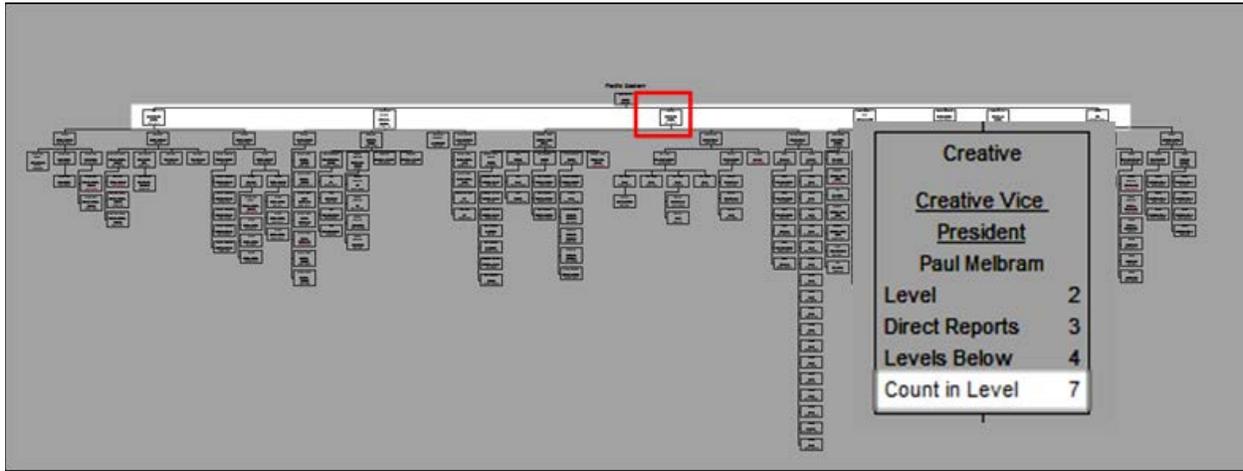


Figure 14.

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.

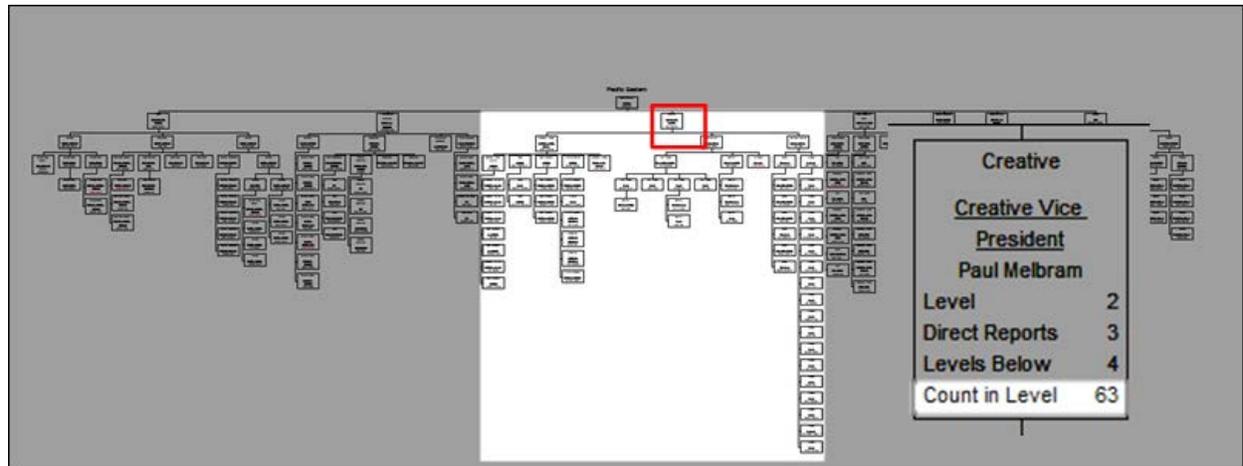


Figure 15.

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**.

The group is saved as **Level 2**.

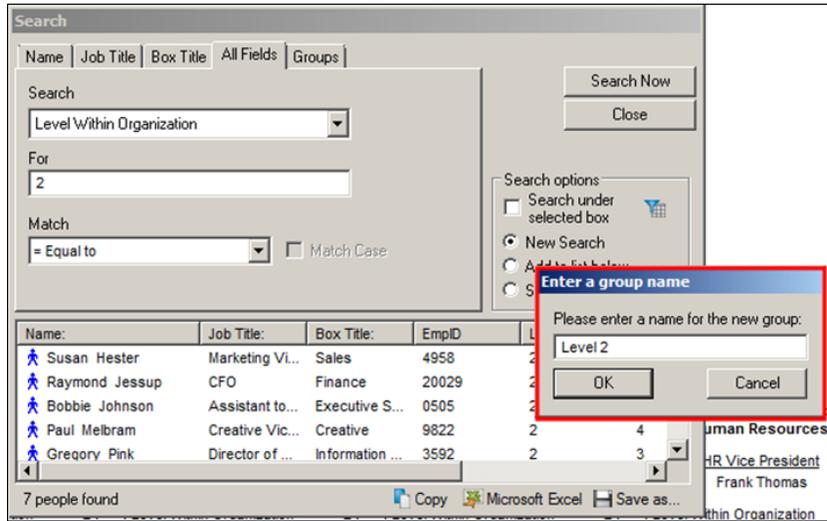


Figure 16.

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

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

Figure 17.

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

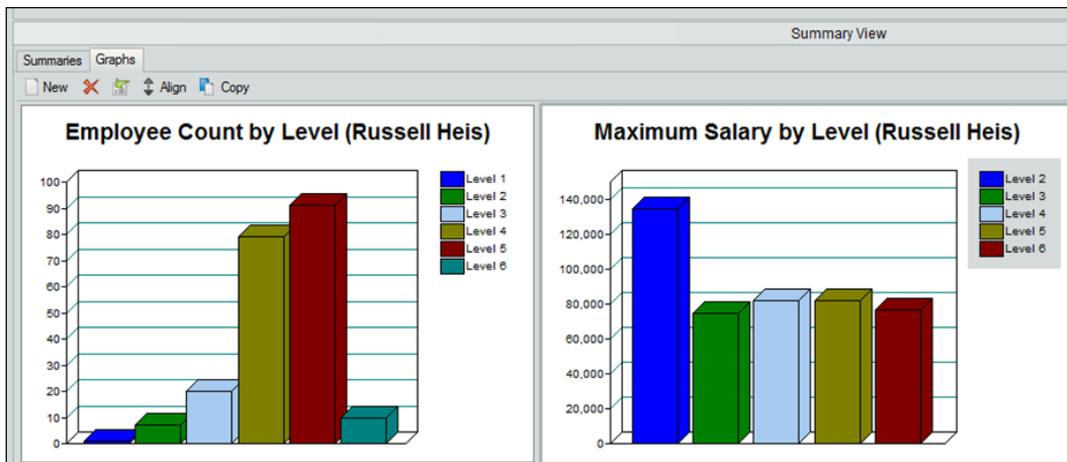


Figure 18.

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

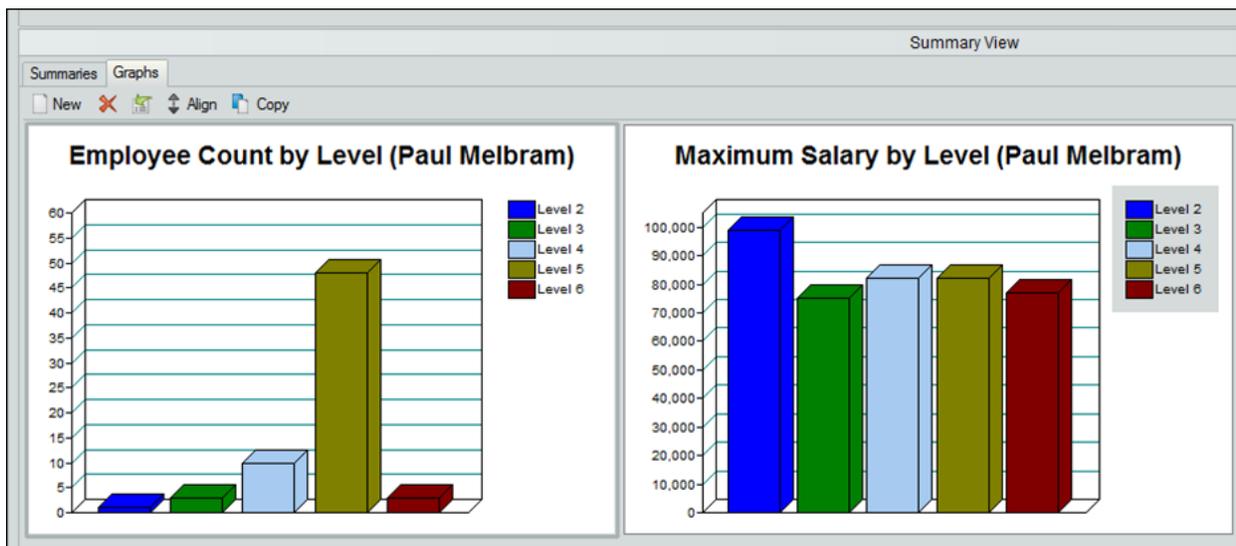


Figure 19.

Using Level or Hierarchy Option with Groups

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**.

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

Count on: **Hierarchy**

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.

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

Figure 21.