OrgPublisher Multiple Reports

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Multiple Reports

Multiple Reports are included in the general term, Matrix Reporting.

Matrix, Indirect, or Multiple Reports

What is matrix reporting?

- Dotted line of indirect reports
- Employees wearing multiple hats – working in more than one position or performing more than one role

Why use matrix reporting?

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

How can I keep track of these relationships?

- Using Position Control in a major HR software package
- Each position is a unique record; a person can fill more than one position and appear in the chart in multiple instances

Data Sample

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

Figure 1.

> **Note:** Each position number (Box ID) is expected to be unique for each record.
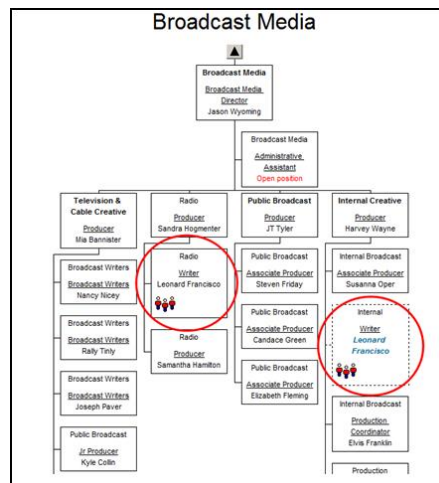
Output Sample

Figure 2.

Multiple Report Icon

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

Multiple report icons appear for records with the same value in Field 5, the Employee field.

Assigning a Multiple Report Icon

Select **Format** from the main menu then **Chart** from the options list.

Select the icon you want to display for the multiple report record. You can select an icon from OrgPublisher or select **Other** to navigate to an icon from your desktop or server.
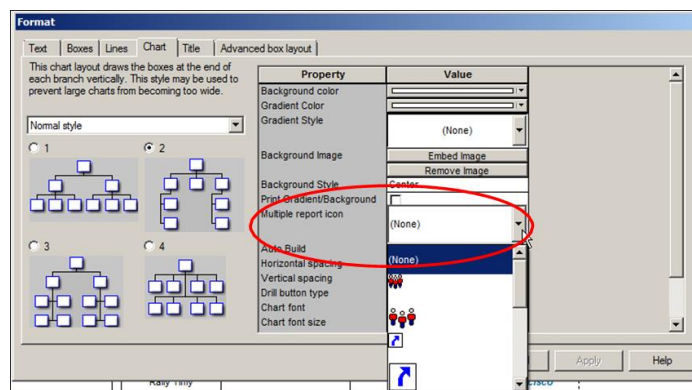

Figure 3.

Multiple Report Icon and the Search View

When viewing a published chart, the end user can use the multiple report icon to identify and display a list of all occurrences of a selected person within the chart.

Click the icon in a chart box to open the *Search View*. A list of the various relationships for the selected person appears in the view.

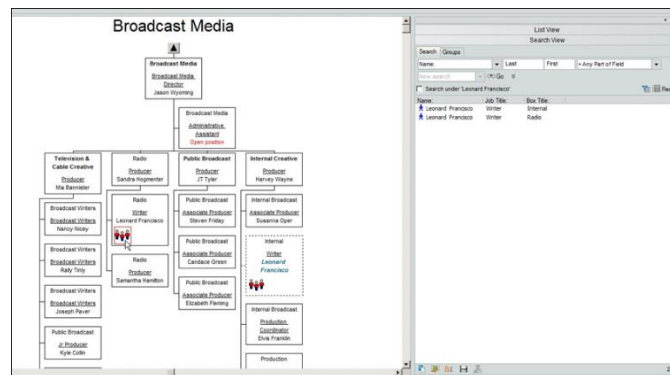Click on the listings to navigate to each position the person holds in the hierarchy.

Figure 4.

Multiple Report Icon and the Hover View

View List of Employee Occurrences in the Chart

When multiple report icons display in the chart and the Hover Profile has been enabled, the end user sees a list of all occurrences of that person within the chart.

Select **Format** in the main menu then click **Chart** in the options list.

Scroll down in the dialog to display the **Show hover profile** option and select the adjacent check box.

Modify the **Hover profile delay** time to increase or decrease the hover display time. Click **OK** to close the dialog.
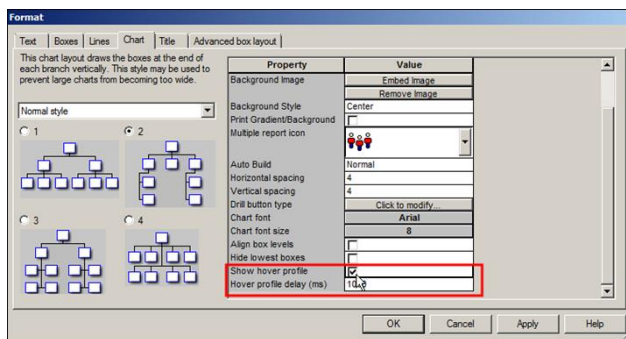

Figure 5.

Locate a chart box that displays the multiple report icon and place the mouse cursor over the icon. The list of occurrences appears in the *Hover Profile*.

Click the Pushpin in the upper-right corner to open the *Search View* and pin the results in the view.
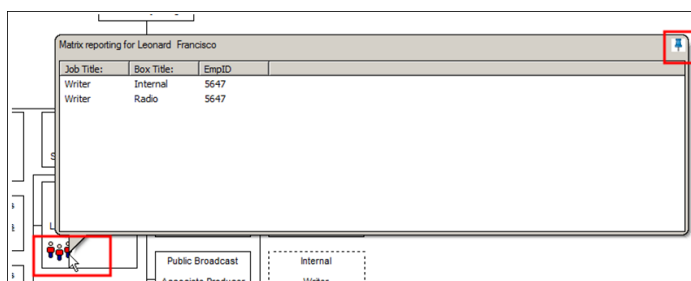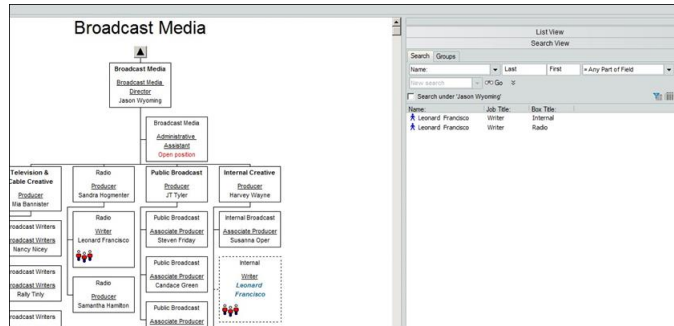

Figure 6.

Figure 7.

View Manager of Indirect Reporting Employee

Note:

This feature is only available in OrgPublisher Premier 10 and later.

The Hover Display feature has an enhancement that allows you to view the manager of an employee who is an indirect report.

There are two steps to this process; modify the chart format to show indirect reports, and create a formula.

Modify Your Chart Format to Show Indirect Reports:

1. In the main menu select **Format.**

2. In the **Properties** column locate **Multiple report icon** and select an icon from the drop-down.

3. In **Multiple/Indirect report display properties** click **Click to modify**.
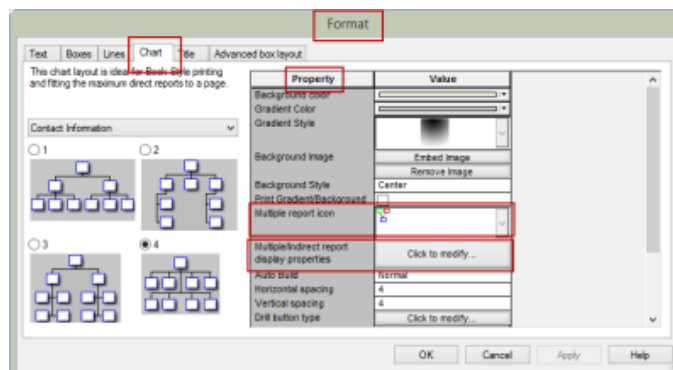

Figure 8.
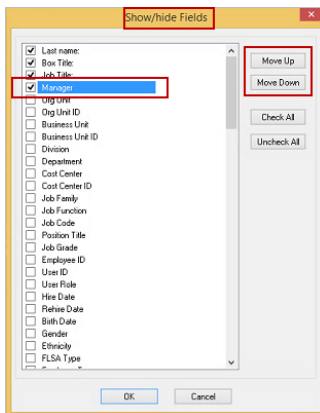
The *Show/hide Fields* dialog opens.

Figure 9.

4. Find **Manager** in the list and click the check box.

Manager is now defined as a field to show in the hover display of Indirect Report managers.

5. Click **OK**.

You are returned to the *Format* dialog.

6. Using the slider bar on the right side of the **Format** dialog scroll down to **Show Hover Profile** and elect the check box.

In Hover profile delay (ms) accept the default of 1000.

7. Click **OK**.

Create a Formula to Specify the *Manager Field:*

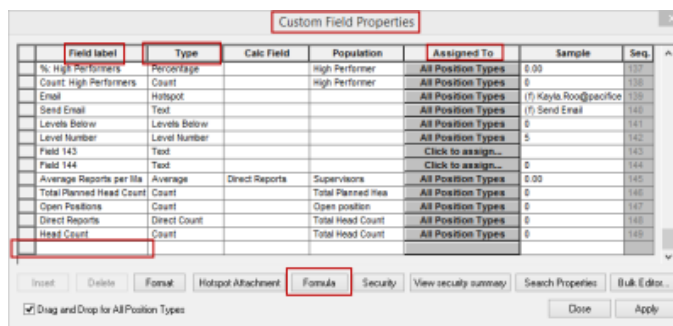1. In the **Main** menu click **Data** and then select **Custom field properties** from the drop-down.

Figure 10.

2. Go to the bottom of the **Field label** column and click the box next to the last blank line.

3. Type **Manager** in the **Field label** column.

4. Click the box in the **Type** column and select **Text** from the drop-down.

Figure 11.

5. Click the box in the **Assigned To** column and select **All Position Types**.

6. Click the **Formula** button.
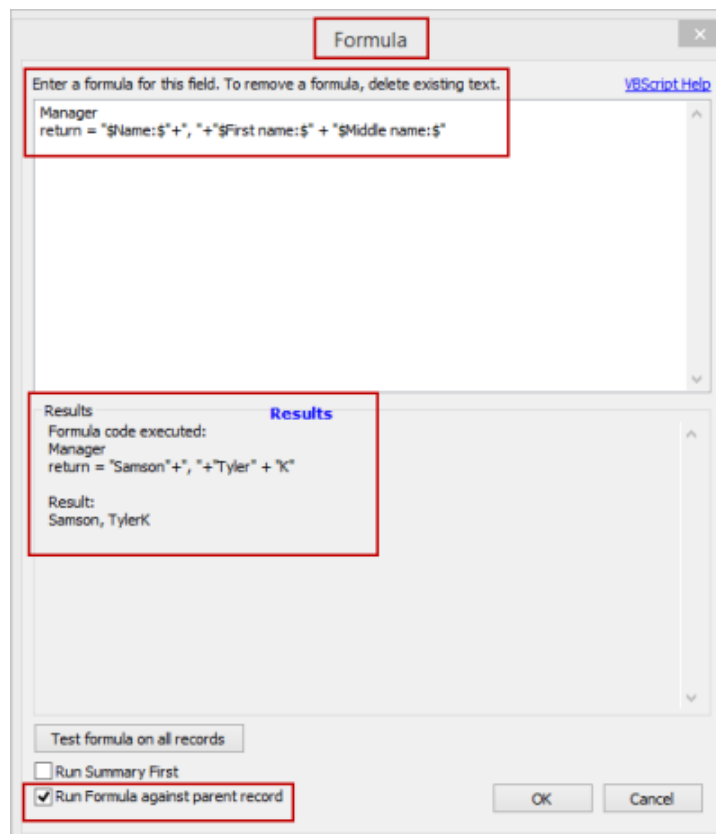
The *Formula* dialog opens.

Figure 12.

7. Type, or copy, the formula as it appears below into Formula input box.

```
return = "$Name:$"+","+"$First name:$" + "$Middle name:$"
```

The table below contains descriptions of the fields on the Formula dialog:

Control	Description
Formula window	Allows entry of a formula. If blank, the field will not have a formula. After every keystroke, the **Formula code executed** section will be updated.
Results Section	**Formula code executed**: Shows code type in the above area. **Result**: Shows the return value of the formula for the first record
Test formula on all records button	Runs the formula against all records in the chart. This is useful for discovering data errors due to missing or unacceptable field values.
Run Summary First Check box	When selected, runs the summary engine before executing the formula.

8. Click the **Run Formula against parent record** check box.

9. Click **OK** and your formula is created.

   Note: Workforce Analysis Graph data changes based on where you are in the chart, just as the Summary View data changes.

10. To see the manager report, locate a box in your chart containing an indirect report icon and hover your mouse over the icon.
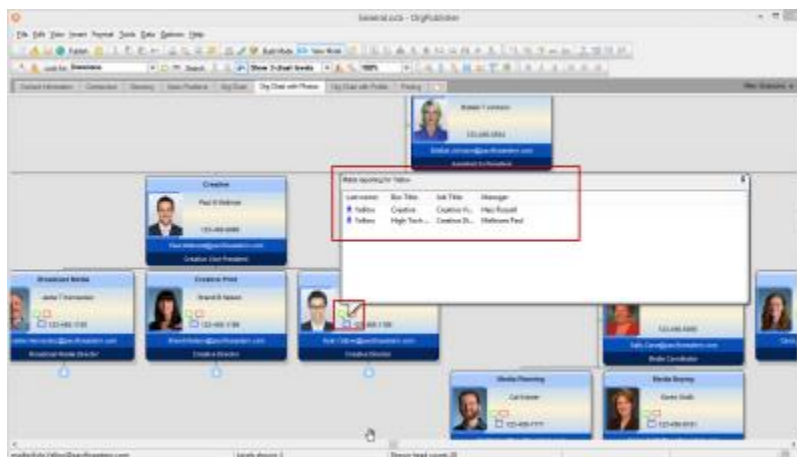

Figure 13.

Matrix reporting for employee reflecting the employee's manager is displayed.