OrgPublisher Position Types

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What is a Position Type?

Your data feed can pass a vale into OrgPublisher that categorizes a record. This is a Record Type. The Record Type is the field/column 4 information when you follow the required OrgPublisher field order.

The Record Type defines a Position Type in OrgPublisher. There are several attributes assigned in the definition. They are:

- Position type name
- Count
- Priority
- Record type (typically passed into OrgPublisher with data)
- Group
- Box type

Once a position type is defined, there are several ways to format, display and report position types in OrgPublisher. For example, you can:

- Format boxes based on position type
- Get counts of records by position type
- Search for people who are set as a specific position type
- Summarize numeric data based on position type
- Determine if data should or should not display in the chart boxes based on position type
- Determine if the chart boxes should or should not display based on position type

Record Type Field

The Record Type field is not a required field. You can, however, simplify the process of categorizing boxes and uniquely formatting them if you provide this information.

The table below displays a section of the OrgPublisher File Layout that pertains to the Record Type. In addition to the preset values, you can add your own unique values to expand the formatting options.

Note: If a record type is not passed in with the data, OrgPublisher assigns all records as Employee (E).

Open positions are created when the data is a Position-to-Position hierarchy and positions are unfilled (no name in the name field).

Field Number	Excel Column	Required	Field Name	Description
4	D	NO	Record Type	This is the type of record which, if left blank, defaults to an Employee record type. You can also define custom record types by typing any alphanumeric characters other than those already used by OrgPublisher. You need to surround these characters with brackets, <>, for example, <Vice President>. OrgPublisher built-in record types are: • **M**: Manager • **E**: Employee • **A**: Assistant • **I**: Indirect Report (IM is an Indirect Report Manager) • **PR**: Partner • **C**: Contractor • **<SF>**: Staff Function • **<SC>**: Successor • **B**: Box (You may not insert a person in a B record type. This record type is typically used to show org units or departments only.)

How to See Position Types in Your Data

If you are unsure if a code has been passed in to define the Position Type, there is a simple way to check.

Use the Summary View

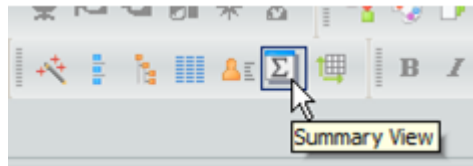1. Open the chart.

2. Click the Summary View button.

Figure 1.

The *Summary View* (by default) opens with all Position Types listed, and a count of records assigned that Position Type.
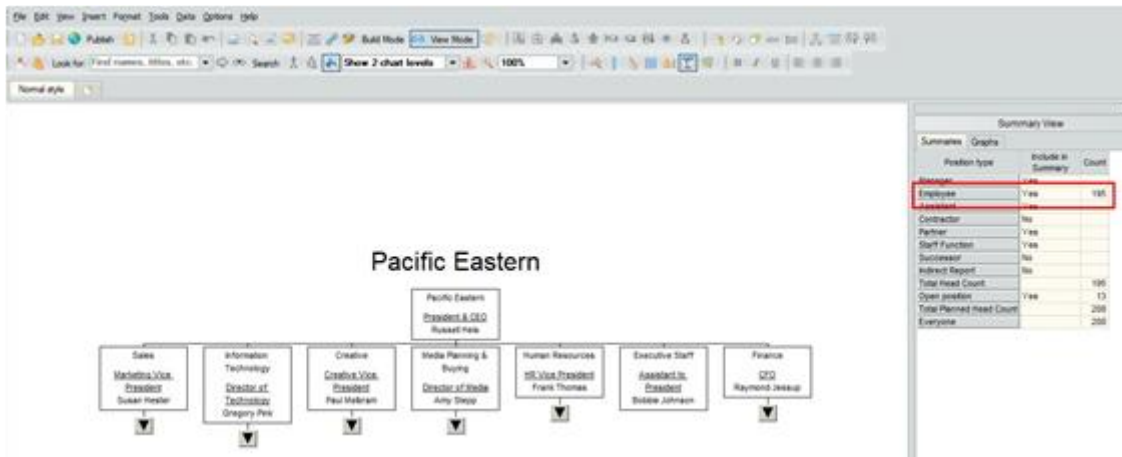

Figure 2.

Nearly all of the records passed in for this example are set to the **Employee** position type. Review the *Summary View* document on the Support Web page for more information about that view.

Click a Person's Name in the Chart

While in View Mode, select a person's name to see the assigned Position Type in the Status bar of the OrgPublisher window.
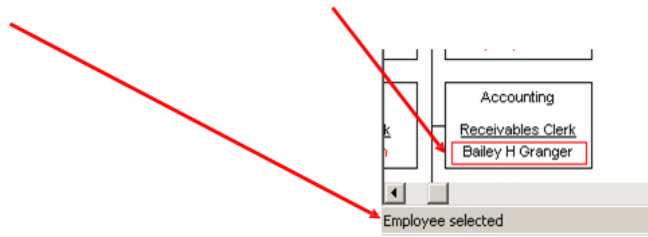

Figure 3.

Defining Position Types

There are several attributes to a position type. The following steps describe the attribute, as well as how to modify the attributes.

Select **Edit** in the menu and then **Define** from the options list.

The OrgPublisher predefined Position types display at the type of the grid in the *Define* dialog.
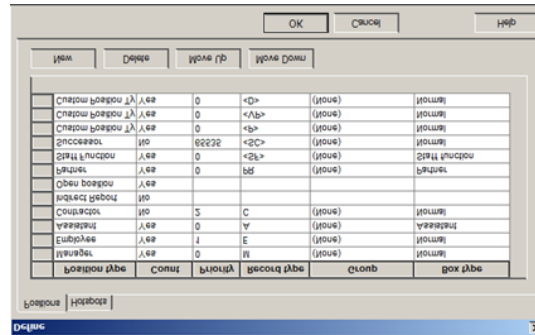

Figure 4.

- **Position type** is the definitions or label of the record type.
    - Predefined Position type labels cannot be changed with the exception of the **Open position** label or a custom position type.
    - If the data feed contains a custom record type, OrgPublisher assigns a default label, **Custom Position Type <yourvalue>**.
    - To modify a label for the open position or custom record, highlight the text in the **Position type** column and type over the field with your new label.
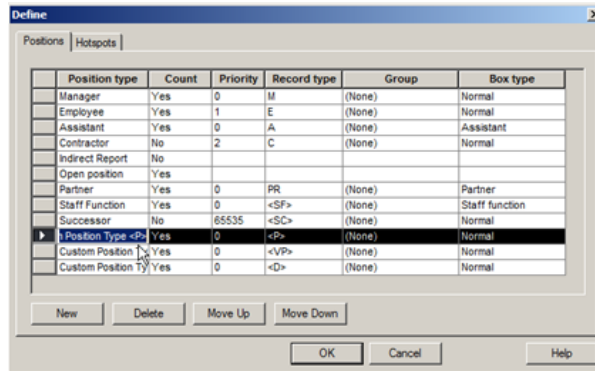

Figure 5.

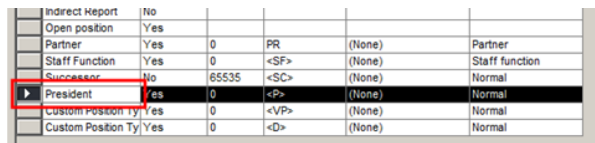The highlighted record is changed from **Custom Position Type** to **President**.

Figure 6.

- **Count** indicates whether or not the position type should be included in the automatic head count. By default, the *Summary View* displays all position type labels, whether positions are counted or not, and the **Count** number is shown for those positions that are counted.

Position type	Include in Summary	Count
Manager	Yes	38
Employee	Yes	98
Assistant	Yes	9
Contractor	No	
Partner	Yes	
Staff Function	Yes	
Successor	No	
Indirect Report	No	
Total Head Count		154
Open position	Yes	13
Total Planned Head Count		167
Everyone		208
President	Yes	1
Custom Position Type <VP>	Yes	3
Custom Position Type <D>	Yes	5

Figure 7.

- **Priority** is used with the AutoBuild feature for the *Chart View* display and with *Print Preview*.

  – AutoBuild allows you to determine if everyone is shown in their own box, combined in a box below the manager, or combined in a box with their manager.
  – Position types with **Priority 0** always remains in their own box.
  – Position types with **Priority 1**, **2**, etc. in a combined chart box are sorted based on the priority, in descending order.

Note: To display all job titles under a manager, a value must be provided in the data for the Job ID field. If you do not use a "job ID," then pass the job title in to the Job ID field.

The combined box example below shows records with job IDs on the left, and records without job IDs on the right.
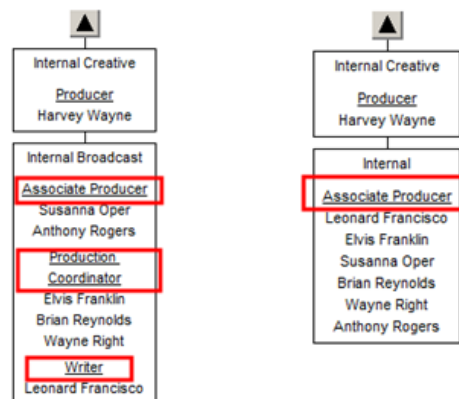
Figure 8.

- **Record type** is the value passed in to categorize the record. OrgPublisher includes several predefined record types, see the <u>Record Type Field</u> section for details.

- **Group** is selected when conditional formatting is needed. See the *Search and Group* document on the <u>Support</u> Web page.

  - Bobbie Johnson should be
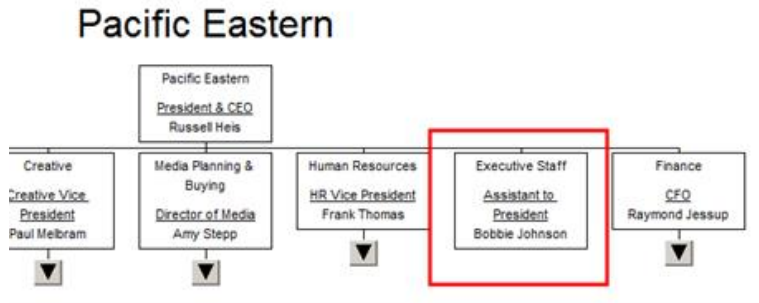

Figure 9.

  - In the *Define* dialog, click **New** to display a new Position type row.
    - Type the **Position type** label.
    - In the **Group** column, select the appropriate group, in this case, the **Admin Assistants** group.
    - Select the **Box type** of **Assistant**.
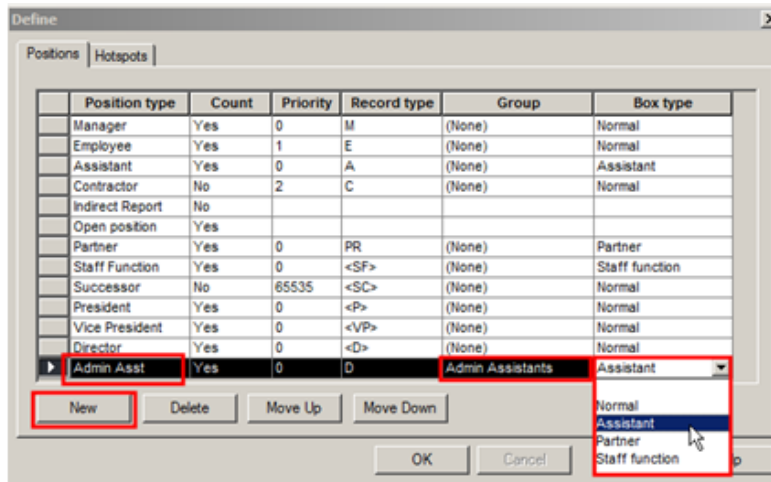   - Click **OK** to save.

Figure 10.

Bobbie Johnson now displays in the Assistant box in the correct hierarchal location in the chart, with the **Admin Asst** position type shown in the Status bar.
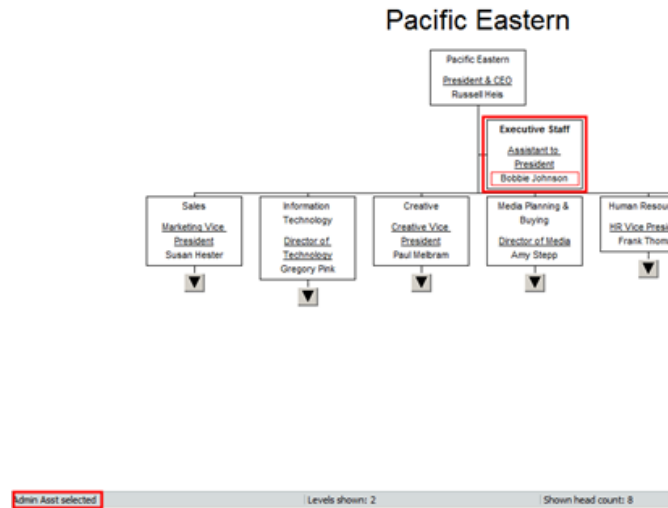

Figure 11.

- **Box type** determines how the box is attached to report boxes in the Chart View. The options include:

  – Normal
  – Assistant
  – Partner
  – Staff Function

Figure 12.

Figure 13.