

OrgPlus™ Premium

Organizational Charting for Planning and Change Management

Organize. Visualize. Strategize. Insperity OrgPlus is the industry-standard software for creating, maintaining and communicating organizational charts. With OrgPlus Premium, manage all human resources activities around workforce change from planning through reporting and documentation. OrgPlus Premium enables you to design your future organization and automatically create all the reports and HR forms you need to implement workforce changes.

Create Charts Automatically

OrgPlus Premium creates organizational charts automatically from virtually any database and integrates directly into a wide range of HR systems and directory services. Data can be imported from several file formats such as CSV, XLS and XML.

Customize Charts

Create boardroom-quality charts for the organization, management team or board of directors. Personalize your charts by effortlessly applying 36 colorful, professionally-designed templates. Select from various box layout options such as multi-column or multi-record to more efficiently visualize large groups, and use optimized branch styles to eliminate repetitive steps and improve chart views.

Understand the Organization

OrgPlus Premium embeds over 36 commonly used HR views into predefined View Templates. Just map your data to OrgPlus fields and quickly toggle through organizational views ranging from contact information to salary and diversity analyses.

Automate Chart Updates

Refresh and republish the chart data on a scheduled basis to ensure that your employees always have the latest information. The process of communicating organizational information becomes completely automated.

Plan for the Future

Intuitive and powerful modeling helps you create and communicate organizational scenarios. Set limits for headcount, total compensation or any other parameter and watch as your updates take effect.

Track Every Change to Your Workforce

Start with your current org chart and make the changes you need: add or remove positions, realign employees and update their information, such as titles or salary.

- Automatic Chart Creation, Maintenance and Distribution
- Connection to Current Human Resource Data
- Dynamic Scenario Planning and Reporting
- Track Workforce Changes
- Generate Employee HR Action Reports or PANs
- Microsoft Office Integration

Monitor Effects of Proposed Changes

See how organizational changes impact financial projections, span of control and other key performance indicators. Confirm each change and manage the financial and headcount effects of the planned changes.

Easily Collaborate and Review

Every change to the org chart is recorded so you can easily share ideas with colleagues and accept or reject changes. OrgPlus Premium keeps a full audit trail of each change, including who made it and when.

Produce HR Action Forms

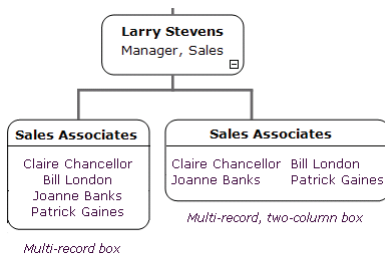
Once changes have been made and approved, OrgPlus Premium generates all your employee HR action forms or Personnel Action Notices (PANs) for entry into your HR system. OrgPlus Premium ensures that your organizational data will always be accurate with new hire, separation and transfer information.

Access Detailed Reporting

Choose from over two dozen predefined reports or create your own to easily view comparisons, summaries and other detailed information.

Integrates with Microsoft Office

OrgPlus technology is embedded in Microsoft Office applications, ensuring compatibility with your existing software investments.



Create customized charts with multi-record, multi-column boxes.

Track Changes	
Total:	6 Added: 0 Deleted: 1 Moved: 1 Modified: 4
Modified	Jaime Finnegan, Executive Assistan (1201)
Name	Jaime Finnegan < Jaime Foley
Modified	Rashmi Gupta, Call Center Senior M (1212)
Title	Call Center Senior Manager < Call Center Manager
Deleted	Scott Turse, Project Manager (1214)
Reported to	Julie Rice, Engineering (1214)
Moved	Pauline Morgan, Jr. Sales Staff (677)
Reports to	Tina Nomura, Sales Manager (1214)
Reported to	Rashmi Gupta, Call Center Senior Manager (1214)

Improve reporting capabilities with chart-comparison summaries.

Summary	
Headcount by Department	
Corporate Development	31
Finance	44
Human Resources	31
Marketing	29
Operations	46
Planning	48
Public Relations	33
Technology	26

Understand predefined metrics with summary criteria panels.

Feature Overview

Track Changes

- Tracks and displays history of changes such as adding or removing positions, redeploying employees and updating salary information.
- View summaries and details of all your changes in exportable Excel reports.
- Share charts with your managers or team members and easily accept or reject changes.
- Produce a navigable, boardroom-quality PDF or PowerPoint presentation of the current and proposed organizations.
- Create summary and detailed reports of changes and metrics.
- Generate Personnel Action Notices (PAN) and reports that translate your org chart actions into HR transactions.

Planning Tools

- Create a summary panel to understand predefined metrics such as headcount, salaries and similar values.
- Calculate salaries, headcount roll-ups, averages, fractions of total, standard deviation and more.
- Create budgets from chart data.
- Use drag-and-drop calculating and dynamic hierarchical reporting tools.
- Define criteria to view pre defined groups at a glance.
- Uncouple hierarchy between charts in different tabs for scenario planning, without affecting the primary chart.
- Insert comments to clarify organizational changes.

Data Import and Export

- Connect to almost any live database. Import data from sources including LDAP, Active Directory, ODBC, OLE DB, Oracle, SQL Server, SAP HR-OCI, TXT, and XLS. Retrieve data from almost any HR system.
- Refresh data with one click.
- Identify and correct gaps in "reports to" information with integrated orphan management.
- Merge fields during imports.
- Specify assistants, chart breaks, chart collapse points and branch styles during import.
- Specify alternate managers to indicate matrix or shared reporting relationships.
- Filter data to create charts for specific departments.

Chart Formatting

- Choose from over 100 view, chart and box style templates.
- Include images and pictures in boxes that autofit to content.
- Use box layout options with multi-records and multi-columns.
- Create multiple tabs within a single file.
- Customize charts with fill effects, including gradients and textures or background template.
- Automatically break large charts into smaller, more manageable sub-charts for analysis.

Integrated Data Management and Reporting

- View organizational information in over two dozen predefined reports.
- Compare chart versions.
- Define archiving rules to quickly retrieve past and present information.
- Create phone lists, salary tables, headcount roll-ups, directories and profiles.
- Perform spreadsheet functions on data in chart boxes, such as roll-up totals, averages, and fractions.
- Show or hide sensitive data.
- Insert links to other files that contain employee information.
- Search and sort chart data within charts.

Chart Publishing and Sharing

- Distribute charts by publishing directly to a corporate Intranet or shared network folder.
- Create PowerPoint presentations, Word booklets or PDF documents complete with title page, table of contents and index, as well as a hyperlinked slide or page for each sub-chart.
- Distribute charts via email from within OrgPlus.
- Set up schedules to refresh and distribute your published files automatically.

Integration with Microsoft Office

- Create, view and edit OrgPlus-created files from within Microsoft Office.
- Use charts in Microsoft Office applications with object linking and embedding (OLE).
- Export chart or report data to Excel for further analysis.

System Requirements

Processor Requirements

- Modern processor (at least 500MHz)

Operating System Requirements

- Windows XP (SP2)
- Windows Vista
- Windows 7

Minimum Memory Requirements

- For Windows XP: 256MB
- For Windows Vista: 512MB
- For Windows 7: 512MB
- 1 GB recommended
- 2 GB > 10,000 boxes
- 4 GB > 30,000 boxes

Minimum Hard Disk Requirements

- 80MB of free disk space

Environment

- Administrator rights required to install OrgPlus
- Internet connection recommended for product activation

CD-ROM or DVD Drive

- Used when installing from a CD

Minimum Graphics Requirements

- 1024 x 768 resolution (1280 x 1024 recommended)

Microsoft Office Requirements

- Office XP (SP3)
- Office 2003 (SP2)
- Office 2007
- Office 2010

Browser Requirements

- Internet Explorer 7
- Internet Explorer 8

OrgPlus Premium is part of the OrgPlus family of solutions, which also includes:

- OrgPlus Standard
- OrgPlus Professional
- OrgPlus Express
- OrgPlus Reader