

# OrgPlus™ Professional

## Organizational Charting for Workforce Modeling and Communication

**Organize. Visualize. Strategize.** Insperty OrgPlus Professional empowers medium-sized businesses to easily visualize their workforce and make more informed decisions using professional-looking organizational charts and best-practice analytics. Selected by more than 400 Fortune 500 companies, it is the industry standard software for automating the creation and publishing of org charts. OrgPlus Professional includes all the features of OrgPlus Standard, but also connects with your HR database to automate chart creation and place valuable information in the hands of decision makers.

### Create Charts Automatically

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

### Easily Manage Large Charts

Break large, complex charts into easy-to-manage hyperlinked sub-charts, and save time by creating multiple tabs within one file to present different views of the organization. Chart information can be published to navigable PDF, HTML, Microsoft Office documents and more.

### Customize Charts

Create boardroom-quality charts for your 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 options, to more efficiently visualize large groups. Use optimized branch styles to eliminate repetitive steps and improve chart views.

### Understand the Organization

OrgPlus Professional embeds over three dozen commonly used HR views into predefined View Templates. All you need to do is map your data to OrgPlus fields, and you can quickly toggle through organizational views ranging from contact information to salary and diversity analysis.

### Automate the Process

Refresh and republish the chart data on a scheduled basis to ensure that your team always has the latest information. With OrgPlus Professional, the process of communicating organizational information becomes completely automated.

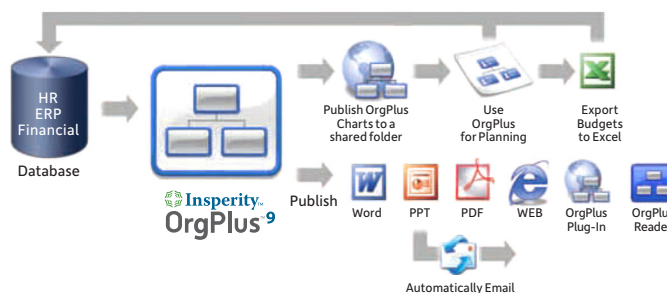
- Automatic Chart Creation
- Maintenance and Distribution
- Connect to Real-Time Human Resource Data
- Dynamic Scenario Planning and Reporting
- Microsoft Office Integration

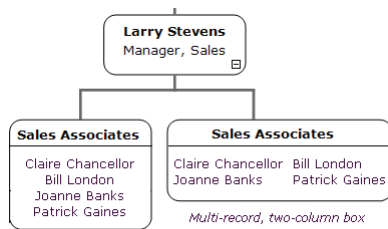
### Plan for the Future with Drag-and-Drop Modeling

Use OrgPlus Professional's intuitive and powerful tools to create one or more organizational scenarios. Set limits for headcount, total compensation or any other parameter and watch as your updates take effect. Compare different scenarios instantly, and when you are done, easily communicate your scenarios to your stakeholders.

### Integrates With Microsoft Office

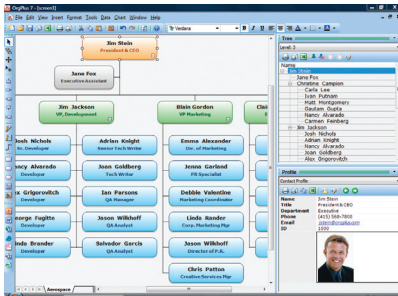
Use Word or PowerPoint to publish and communicate charts, or open and edit OrgPlus-created files from within Microsoft Office applications. This means that employees and managers who do not have OrgPlus installed can use charts to meet their planning and republishing needs.





Multi-record box

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



Profiles complement the org chart with additional details.

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.

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

- OrgPlus Standard
- OrgPlus Premium
- OrgPlus Express
- OrgPlus Reader

## Feature Overview

### 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. Supported systems include Oracle, PeopleSoft, SAP, Lawson and others.
- Eliminate the need to re-import data every time an update is made to the database and preserve chart formatting with one-click data refreshing.
- Identify and correct gaps in "reports to" information with integrated orphan management.
- Validate data for accuracy and completeness.
- Merge fields during imports.
- Specify assistants, chart breaks, chart collapse points and branch styles during import.
- Filter data to create charts for specific departments.

### Chart Formatting

- Type names, titles and information into each box - boxes automatically shrink or expand to fit text.
- Choose from 36 chart and box style templates.
- Apply one of over three dozen predefined View Templates for best-practice based organizational information.
- Automatically break large charts into smaller, more manageable sub-charts for refined analysis.
- Highlight key information with smart fields and conditional formats.
- Create multiple tabs within a single file.
- Define an underlying background page that is common to all sub-charts.
- Include images, icons and pictures in boxes that autofit to content.
- Customize charts with fill effects, including gradients and textures.
- Utilize enhanced box layout options with multi-records and multi-columns.
- Integrate Windows Office-style interface and toolbars.

### Integrated Data Management and Reporting

- Compare chart versions in an easy-to-read report.
- 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, fractions and standard deviation.
- Show or hide sensitive data.
- Insert links to other files that contain employee-related information, including budgets, employee resumes or mission statements.
- 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 refresh schedules to distribute your published files automatically - daily, weekly, or monthly via email, FTP, or a shared network.

### 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 predefined groups at a glance.
- Uncouple hierarchy between charts in different tabs for scenario planning, without effecting the primary chart.
- Insert comments in OrgPlus charts to clarify organizational changes.

### 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