



## Sage OrgPlus® by Insperity

Easily assess your current organizational structure and respond to your company's changing needs with the industry-standard organizational charting software for companywide communication and planning. Sage OrgPlus helps you and your employees better understand your company's structure, as well as everyone's role in achieving organizational objectives. Sage OrgPlus facilitates these objectives by including a variety of features, such as data management, organizational planning, and intuitive chart creation and formatting. Publish your charts directly to a website or your intranet and refresh the data on a predefined schedule of your choosing with advanced publishing capabilities.

## Strategize for different business scenarios

With Sage OrgPlus, employees and managers have easy access to up-to-date organizational charts that give them the information they need to understand your business and plan for the future. Managers can strategize for different business scenarios, share the chart data, and measure their impact using built-in formulas to measure headcount, salaries, or other important planning and key metric information. Additionally, you can easily communicate your organizational structure to employees and centralize employee contact information.

## Easily customize your charts

Sage OrgPlus also includes a variety of formatting tools that allow you to quickly create organizational charts that can be published in various Microsoft Word, HTML, or navigable PDF and PowerPoint formats. With dozens of predefined chart templates and drag-and-drop functionality, you can easily customize organizational charts to meet your company's unique needs. And you can further modify them with an array of design tools and visual effects and create global views of your organization with multiple, customized tabs within one file.

## Product options

Not every company is similar in size, industry, budget, and business need. As a result, Sage offers solutions that are available as an on-premises, license, or Software-as-a-Service (SaaS) subscription to ensure that all clients have the solution that meets their needs.

We competitively priced each level so that it is affordable yet still extremely robust. Speak directly to your Sage business partner to gather more detailed information on each level.

**Sage OrgPlus:** Provides automated importing and publishing functionality for charting employees. Map your data into Sage OrgPlus fields and quickly import from a variety of sources. Publish charts to PDF, PowerPoint or the web. Automatically synchronize data so your chart is always current. Schedule charts to automatically publish to your intranet or a network drive or through email distribution.

**Sage OrgPlus RealTime:** This solution provides all of the functionality that you

receive from the desktop version but is offered as a Software-as-a-Service (SaaS). Sage OrgPlus RealTime promotes collaboration. Proposed changes to your organization can be shared with other team members to solicit feedback and approval using email notifications and alerts.

## Benefits

### Chart creation

Automatically and quickly create organizational charts by linking to your Sage HRMS database. Dynamically format your data to bring attention to specific information for a more complete view of your data.

### Chart publishing, printing, and sharing

Publish your charts in a variety of formats, including Microsoft® PowerPoint, Microsoft Word, Adobe Acrobat PDF, HTML, or post them directly to the web or your company intranet.

### Schedule updates

Refresh, distribute, and publish your chart data in a predefined schedule of your choosing to ensure that your employees always have the most up-to-date information.

### Business planning tools

Create "what-if" business scenarios to measure their impact.

### Integrated data management

Perform spreadsheet functions on data in chart boxes and insert links to other files.

### Chart customization

Customize charts with one of 36 predefined templates, import pictures, create card views, and include fill effects such as gradients and textures.

### Flexible formatting

Create multiple rows under one manager with multicolumn chart styles, import and manipulate pictures to boxes and backgrounds, and group boxes within charts.

### Microsoft Office integration

Generate, view, and edit organizational charts in Word and PowerPoint® and export your charts to Excel® for analysis.

### Available with:

Sage HRMS  
Sage Abra Suite

## Features

## Sage OrgPlus

## Sage OrgPlus RealTime (SaaS)

Chart creation		
Professional-quality charts	•	•
Best practice-based view or design templates	•	•
HR metrics (salary or span of control)	•	•
Intuitive Microsoft Office 2010-based user interface	•	•
Improved Import Wizard that lets you bring in data from: Microsoft Excel, TXT/CSV, LDAP, ODBC	•	•
DSN, OLE DB, Oracle, SAL (HR-OCI), SQL Server, Database Connection	•	•
Planning and analysis		
Model scenarios for organizational change	•	•
Built-in reporting tools for easy data analysis	•	•
Chart data exported to Microsoft Excel	•	•
Employee addition or removal without rearranging chart	•	•
Drag-and-drop boxes to easily change chart	•	•
Formatting		
Chart automatically formatted for optimal printing or display	•	•
Symbols library to replace text with easy-to-understand visuals	•	•
Professionally designed templates and sample charts	•	•
Smart fields that highlight data meeting user-defined conditions	•	•
Conditional formatting that highlights data meeting your criteria	•	•
Training and support		
Updated tutorials that make advanced features easy to use	•	•
Printing and publishing		
Easily created directories, phone, and emails for quick contact	•	•
Printable wall charts or booklets	•	•
Print preview to review chart before printing	•	•
Publishing wizard to configure publishing and printing options	•	•
Charts published to PDF, Word, PowerPoint, and the web	•	•
Charts published in navigable PDF with clickable arrows	•	•
Charts published in HTML for websites and intranet	•	•
Scheduled publishing to web, intranet, shared drive, or email	•	•
Data automation		
Advanced import features for data filtering and sorting	•	•
Hierarchy mapper to manage unassigned positions or groups	•	•
Change log to catalog all changes made to your charts	•	•
Scheduled data sync with source data to keep charts up to date	•	•
Personnel action notices and detailed action reports		•
Reporting		
Full audit trail to track organizational changes		•
Predefined, automatically updated reports for quick decisions		•
Change summary reports that list details of all chart changes		•



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