Intuitive Microsoft Office based user interface puts all Insperity OrgPlus capabilities at your fingertips View Templates are pre-built with fields and formulas to address HR challenges Smart Fields highlight when data in any field meets user-defined conditions Windows 7 & 8 certified compatibility ensures smooth integration Updated training and tutorials make even the most advanced features easy to use Improved Import Wizard guides chart creation and formatting. The Wizard allows you to specify fields, chart styles and more during the import process Symbols Library allows you to replace text with easy-to-understand visual icons Designer templates and samples help you quickly create professional-looking charts Formatting options like font, color, style and text alignment provide greater control over your chart design Insert pictures into boxes and free-floating objects Sub-charts make large charts manageable by breaking them into smaller sections Profiles display additional details for communication and analysis OrgTree panel enables views and editing of entire hierarchy Print charts for distribution and sharing Create directories, phone and e-mail lists for quick contact Hotspots or hyperlinks display related information Publish charts in HTML for websites and intranets Import data from ODBC, Oracle, LDAP, TXT, XLS and XML Export data to Excel, CSV for additional analysis Customisable formulas allow you to create hierarchy-driven metrics within your charts Advanced search lets you run ad hoc queries and quickly identify people based on specific or multiple criteria Advanced import features allow you to handle duplicate records, filter data, sort by specific criteria, and more User defined archiving rules enable you to retrieve past and present information Publish charts in Microsoft Word or PowerPoint format to include in documents Publish charts in navigable PDF format including clickable arrows for easily moving through the chart Publish charts to the Web either in HTML or for the Insperity OrgPlus free browser plug-in Scheduled data synchronization with source data keeps your chart information up to date Scheduled automatic chart updates keep the chart current on Web, corporate intranet or shared network drive Automatic e-mail distribution simplifies chart sharing with co-workers In this guide we walk through the steps required to export the organisation chart data held within OrgPlus, import it into SharePoint 2010 and then create an organisation chart from it. Although this guide focuses on OrgPlus it is applicable to many other types of organisation chart software. From the Data menu select the Export Data option. This will open the Export Data window. Choose the information that you wish to export from the Org Chart and most importantly ensure that the Reporting relationship option is checked. Press the Export button and save the data as a "CSV" file type onto your desktop. Within SharePoint 20 Click View All Site Content, and then click Create on the All Site Content page. Under Custom Lists, click Import Spreadsheet For further information on creating lists from a spreadsheet refer to this article and this. Enter a name for the list in Name and browse to the .csv file location that you saved earlier and press Import Microsoft Excel will open, change the Range Type to Range of Cells and then use the Select Range option to select the full range of data that you require and press Import Once the data import has completed you will be returned to SharePoint and will see the newly created list. SharePoint will rename any field called "Name" or "Title" as these names reserved by all SharePoint lists. In this example the columns Name1 and Title1 have been created. Add a SharePoint Org Chart to a web part page (See article for more details). Once this has done select the option to create a chart from an existing list and press Next. In the Configure Data screens choose the SharePoint list created by the Excel spreadsheet import process from the drop down menu and choose Name1 as the primary key and ReportsTo as the manager.   Choose Name1 and Title1 from the available columns. As the list does not contain pictures set the Template Style list to NoPhoto and use this page to set any other style options that you require. Once you exit the configuration wizard the organisation chart will be displayed. You can go on to add the search, information and StartPart webparts to build up a feature rich, interactive organisation chart page for your end users. For Office 365 and Microsoft Azure Online, interactive service based application $100 +   For ASP.NET websites and applications Versatile & feature rich $200 +   Insperity OrgPlus is a versatile business software tool that falls under the vertical-market-apps subcategory. The latest version, 11.2.2203, offers a sophisticated platform for creating and comparing different organizational structures efficiently. It is developed by Insperity and runs seamlessly on a range of operating systems, including Windows XP, Vista, 7, 8, 10, and 11. The program's usability is enhanced by its intuitive drag and drop functionality, making model creation straightforward and user-friendly. Additionally, users can gain insights into personnel data such as headcount, salary, and tenure directly within their charts, facilitating quick and informed decision-making.For those interested in older versions, 11.2, 11.0, and 9.1 are also available, ensuring compatibility and preference for different users. The program file names, Insperity OrgPlus.exe, and OrgPlus9.exe, indicate the specific versions for straightforward installation.The software is offered under a shareware license, meaning users can download the program and try it out free of charge before committing to a purchase. This flexible licensing is ideal for businesses wanting to explore its features without immediate financial commitment.Pros:Intuitive drag and drop interface for easy model creationAbility to display key metrics like headcount, salary, and tenure in chartsBroad compatibility with various Windows operating systemsAvailability of older versions for user preferenceCons:As shareware, full functionality may require purchase after the trialMay have a learning curve for new users unfamiliar with organizational design softwareOverall, Insperity OrgPlus provides a robust and user-friendly tool for businesses looking to streamline their organizational structuring processes.It is not possible to confirm if there is a free download for this software available on the developer's website. We recommend checking the downloaded files with any free antivirus. You may want to check out more software, such as HumanConcepts OrgPlus, Performance Now or PerformanceNow, which might be similar to Insperity OrgPlus. Our Technical Support Team is available Monday through Friday 7:00-7:00 CST. Note: Hours of operations subject to change based on holidays observed or other events that may result in company or departmental closure. You can learn more about using OrgPlus by exploring our library of video tutorials Building Charts with OrgPlus: A Two Minute Video Tutorial Updating Charts: Manual and Scheduled Data Refreshes Customizing Charts: Adding a Logo, Employee Photos, and Company Colors Enhancing Charts: Harnessing the Power of Profiles, Directories, and Reports Sharing Charts: Publishing Made Easy Visualizing Change: Easy Tools for Charting Organizational Growth and Change If you are looking for OrgPlus Reader, you have come to the right place. We explain what OrgPlus Reader is and point you to the official download. What is OrgPlus Reader? OrgPlus Reader is the program for consumers of products created by the OrgPlus program. Insperity's OrgPlus software is a charting application for organizational use: it allows groups like corporations to visualize as well as analyze their human resources through charts. OrgPlus Reader is unable to create org charts in itself, as it is not an authoring application. What it does do is provide users with a way to access charts generated by OrgPlus in read-only mode. The application also has search functions in it, so users can seek specific persons within the chart with ease. Essential navigational viewing options are also included in the software, which lets users pan their views, zoom in or out of the chart, and more. While the program cannot create OrgPlus charts, as mentioned, it can in fact export chart data, albeit into another format: chart data can be converted in XLS format by the software, which is also able to print charts needed by the user. Users can specify that only a particular region of the chart should be printed out too, if they do not require the entire org chart. To qualify for an upgrade of your Insperity OrgPlus software, you must meet the following criteria. Customers who purchase an upgrade that do not meet these criteria will not be able to install the application and your order will be non-refundable. OrgPlus upgrade eligibility To purchase an upgrade for OrgPlus, you'll need to own and have currently installed one of the following versions of the software you are upgrading from: • OrgPlus v.9 • OrgPlus 2012 To verify your current software version: 1. Launch the application 2. Click the icon in the toolbar 3. Make note of the Version number Continue with upgrade Buy full version Copyright © 2025 Insperity Business Services L.P. All rights reserved. Insperity OrgPlus is used by organizations that need to visualize their workforce and make informed decisions using professional organizational charts and best-practice analytics. Let us show you how to break large, complex organizational 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. We can show you how to easily bring in your data from various sources such as, Microsoft Excel, TXT/CSV, LDAP, ODBC_DSN, OLE_DB, Oracle, SAP (HR-OCI), SQL Server, and a Database Connection file. By using real-world examples that are relevant to your specific business needs, we ensure that students retain information better. So when they get back to the office, they'll be able to complete their daily tasks more efficiently. The engaging hands-on experience, combined with practice on relevant examples will make your team confident in their skills once they get back to the office. We understand that not all students learn at the same pace. That's why we give you the individual attention that you need, even in a group setting. You will learn new tips and tricks to apply to your daily work, whether you're a beginner or an advanced student with lots of experience. Insperity® OrgPlus® empowers businesses to easily visualise their workforce and make more informed decisions using professional, board-room quality organisational charts and best-practice analytics. OrgPlus is the standard for automating the creation and publishing of org charts. It connects with your HR database to streamline chart creation and place valuable information in the hands of decision makers. Pre-defined reports show just the information you need for business decisions, and update automatically as the chart changes Tabular Reports enable you to group information by any field for a high level snapshot of organisational characteristics Chart Comparison allows you to compare past and current charts and generate detailed reports Summary Panel shows high-level stats for instant communication Intuitive Microsoft Office based user interface puts all Insperity OrgPlus capabilities at your fingertips View Templates are pre-built with fields and formulas to address HR challenges Smart Fields highlight when data in any field meets user-defined conditions Windows 7 & 8 certified compatibility ensures smooth integration Updated training and tutorials make even the most advanced features easy to use Change Summary Reports list details of all changes made to your chart Track Changes with running list of all moves, adds, deletes and changes made to the chart Side-by-side Comparison Reports list changes made to the chart, along with both old and new values

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