



Insperity® OrgPlus® RealTime
User Guide
Getting Started

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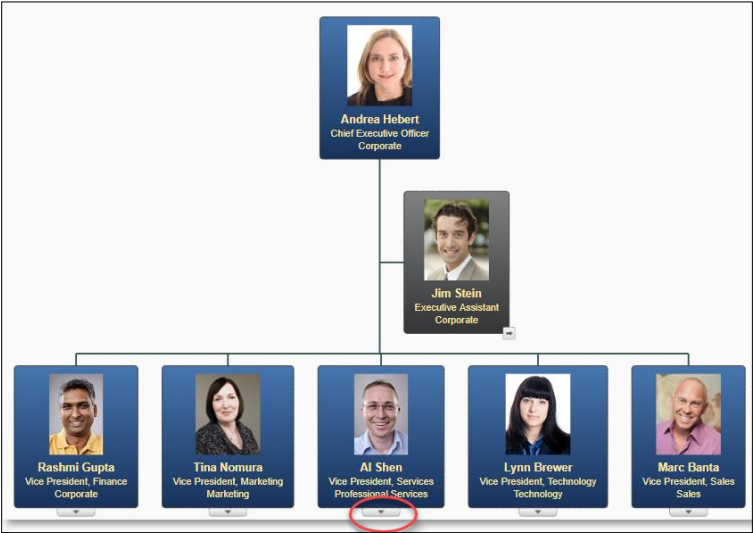
This guide will provide a brief explanation of the key features you will utilize as role-based user and will cover:

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Organizational Chart Basics










Upon logging into Insperity OrgPlus, your company's organizational chart will display in the center of your screen. Displayed on each box, you will be able to see basic information about the employee. Clicking on the up or down arrows allows you to move through the chart to see the next set of levels of employees.



Tools for Navigating and Displaying Your Charts

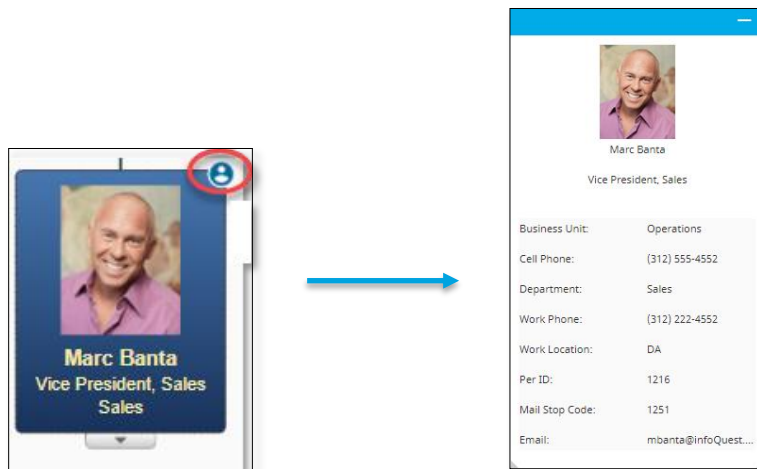
At the top right menu bar, you will find the following icons that allow you to change the look and feel of your organizational chart.



Icon/Feature	Explanation
	Marquee: Multi-select a range of boxes in the chart.
	Home: Navigates to top of the chart.
	Make Top: Makes the selected box the top of the cart in the chart viewing area.
	Up One Level: Navigates up one level visually from their current position.
	Restore Default Settings: Reverts the chart style back to the default settings.
	Legend: Displays the chart key, filters, and field visibility selection.
	Add Text Box: Adds a text box note to the face of the chart. Text boxes are only viewable to the user.
	Branch-Styles: Changes the layout of just a few boxes or the entire chart.
Sub-Chart ▾	Sub-Chart: Increases or decrease the number of boxes visible.
Options ▾	Options: Zoom, view chain of command, or matrix managers tools.
Views ▾	Views: Allows the switching between different views set up by the administrator .
Search Chart... 🔍	Search: The quick search feature provides an easy way to find someone on a chart.
	Profile: View an employee's profile card. A profile card can provide more data on the person selected.

Seeing Additional Employee Information with Profile Cards

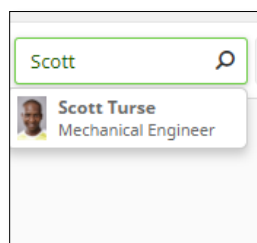
When hovering over the top right of their box, each employee will have a profile icon. Clicking on the profile icon will open a window that has additional information about the employee.



Finding Employees with Quick Search Tool

The quick search feature powerful and very easy to use. To use the search, click in the search box and begin typing the name or job title of the employee you would like to find in the chart.

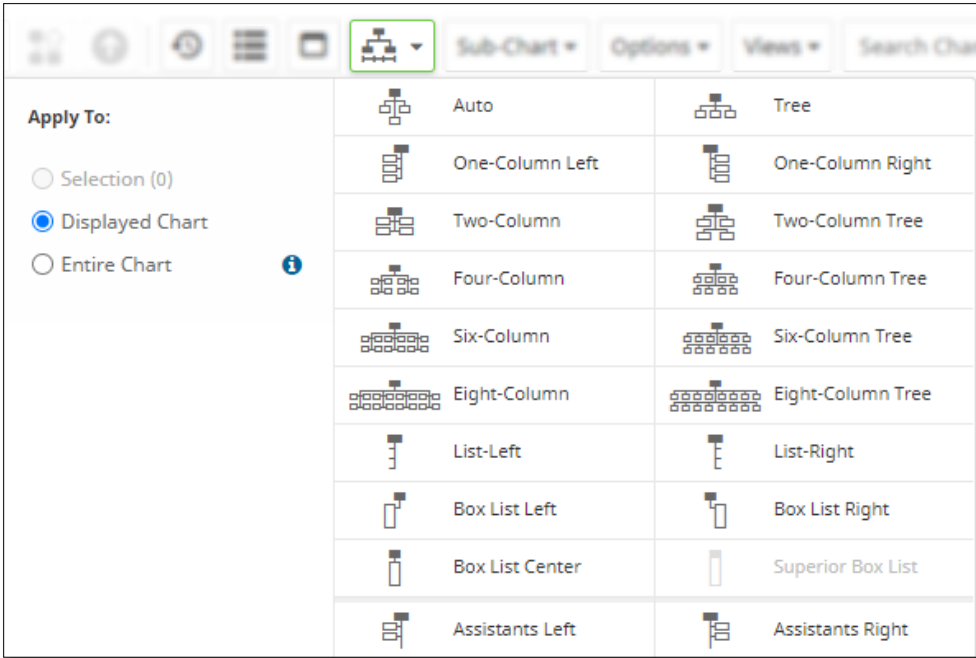
As you type, the system predictively presents matches to your search. Simply click the one you want, and you're taken instantly to their box on the chart.




Changing the Layout Using Branch-Styles

Branch-styles allow you to adjust the layout of your chart. You can apply styles across the displayed chart area, the entire chart, or a specific selection of boxes.

To change the style of the chart, use the **Branch-Styles** icon  and select a style to apply to the chart.

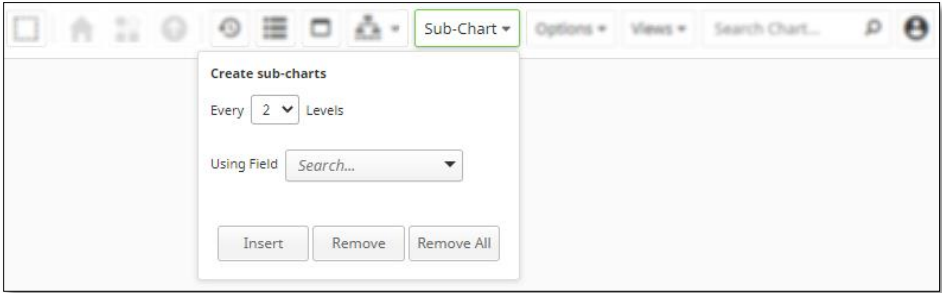


To the left, you can choose how to apply the new style; Selection (only those boxes highlighted), Displayed Chart (the boxes visible on the screen), or Entire Chart (all boxes on all levels).

To multi-select boxes, you can use the **Marquee** icon. 

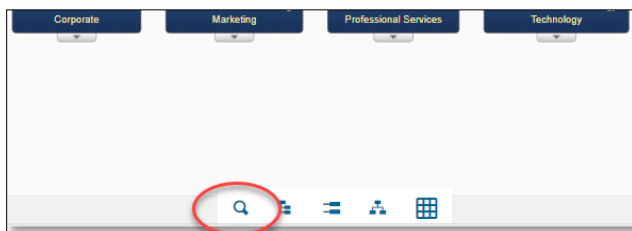
Viewing More or Less Boxes with Sub-Charting

Sub-charting will allow you increase or decrease the number of levels of boxes on a page. You can change the number of levels displayed by clicking on the **Sub-Chart** icon and changing the number to the number of levels you would like to display.



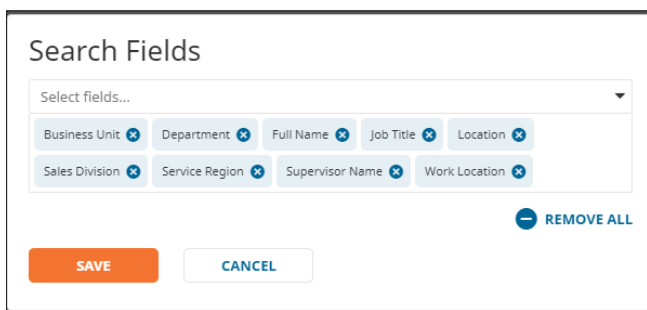
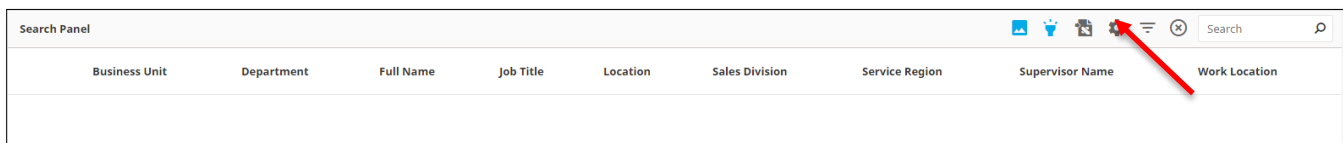
Using the Search Panel and Filters

To search the chart using keywords and filters, you can use the **Search Panel** feature and apply preset and custom filters. The filtered search results will display in a list view. To access the **Search Panel**, click the icon at the bottom of the page.





Setting the searchable displayed columns

The **Search Panel** will default to the column settings set up by the administrator. You can change the columns by going to **Settings, Search Fields** and add the fields you want to display.



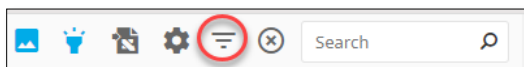
Using the search box

To search the chart, begin typing your search criteria in the search field. Your results will display in a list view on the screen. Clicking the employee in the list will take you to the employee in the chart above.

Search Panel					
Name	Title	Business Unit	Department	Work Location	
 Lynn Brewer	Vice President, Technology	Operations	Technology	AT	
 Aaron Lyon	Supervisor, Payroll	Operations	Service Operations	KW1	

Creating and using filters

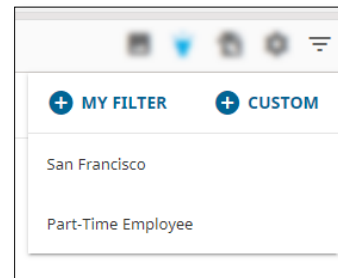
To filter the search results, you can select one of the pre-defined filters set up by the administrator or create your own by selecting the filters icon.



The types of custom filters are **Custom** filters and **My Filters**.

Custom Filter: Create a custom, one time use filter.

My Filter: Creates a saved custom filter for later use.



To create a one-time use filter, select **Custom**:

In the first drop down box, select the field that you want to use to limit your search. Next select the qualifying argument (equal to, is, is not...), then complete the qualifying condition.

Custom Filter

Match the following rule:

Any Field

is empty

-

+

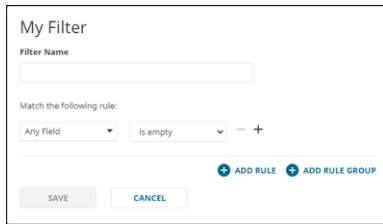
+ ADD RULE + ADD RULE GROUP

OK

CANCEL

For example, if you want to search for only those employees whose titles contain Director, then the following field choices can be set to "Job Title" "Contains" "Director".

To create a personal filter to save for future uses, select **My Filter**:



Name the filter in **Filter Name**.

In the first drop down box, select the field that you want to use to limit your search. Next select the qualifying argument (equal to, is, is not...), then complete the qualifying condition.

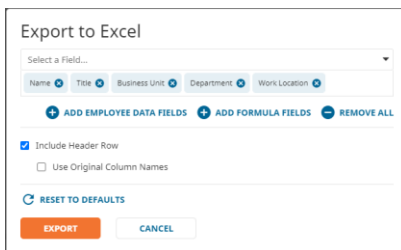
Press **Save** when complete.

Exporting your search results

You can export your search results to excel by selecting the **Export to Excel** icon:

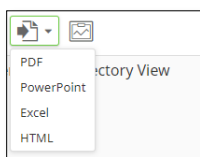


This will take you to a screen where you can configure the files you would like to export. You can include just the fields displayed on screen or you can add all the fields for which you are granted permission to access.

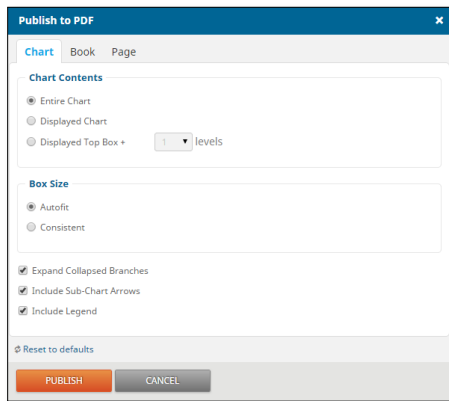


Printing Your Chart

The share icon allows you to publish your chart in different formats. The **Share** icon is located on the left side of the menu bar. Click on the **Share** drop-down arrow. You will see the four publishing options displayed: PDF, PowerPoint, Excel, and HTML.

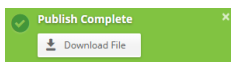


The PDF and PowerPoint allow you to decide whether to publish the entire chart, just the chart currently displayed on your screen, or the displayed top box on your screen and however many additional levels you would like published.



The **Book** tab on the PDF and PowerPoint publishing menus allows you to make decisions about a cover page, table of contents, and index page. The **Page** tab allows you to make decisions about margins and paper size.

Click **Publish** to generate the chart. Once complete, you will get a notification to download your chart.



Exporting Data from Your Chart

Following the same process as printing your chart, choose **Excel** to export your data. Determine the fields you would like to include and click **Export**.

