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OrgCharting is a powerful organizational chart maker with an easy interface that allows users to create org charts with simply mouse clicking or data file generation. It has ready-made templates and advanced color themes to help you make professional-looking organizational charts in the fastest way. OrgCharting works not only for company structure visualization, but also for workforce planning and management. It gives an overall picture of company hierarchy and personnel reporting relationships, so that company managers could gain insight for decision making and strategic planning. Besides, the chart itself can be used as an employee database, through which you can find, manage and update employee information. The view options of OrgCharting allows users to choose or define a special view to display relevant information only for special purposes.

With OrgCharting, you can create org charts that are highly customized, for example, with personalized color scheme, layout style, background, or data field. Once you finish the chart, it’s easy to export your chart to lots of file formats such as PDF, JPG, Word, PPT, etc., so that you can share the chart with others easily. You can also make awesome presentations using the automatic slide deck generation function.
CHAPTER 2 GET STARTED WITH ORGCHARTING

USER INSTALLATION

Download OrgCharting installation package from
https://www.edrawsoft.com/download-orgchart.php, and double click the .exe file to install the package.

USER ACTIVATION

Once successfully installed, you can register the software with your license code. If you do not have a license code, you can click Buy Now to order.

1. Run OrgCharting software with computer administrator privilege.
2. Click the Help tab of the ribbon.
3. Click Register under the Help tab.
4. Input your License Name (can be any name) and License Code.
5. Click Activate to run the Activation Wizard.

USER DEACTIVATION

Deactivation is necessary if you wish to move OrgCharting from one computer to the other.

Please note deactivation can only be done once every 30 days.

The steps are:

1. Simply go to the Help tab, and click Deactivate.
2. Once you have clicked Deactivate, the OrgCharting software on your current computer will turn to unlicensed version, so you can activate the software on another device.

SIGN UP CLOUD ACCOUNT

You can sign up an OrgCharting cloud account and sign in to use the cloud or share your charts.
CHECK FOR UPDATES


USERS INTERFACE OVERVIEW

The interface shows the initial and overall window where you can create org charts. Here you can see File Tab, the Quick Access Tool Bar, Ribbons, Right-side Bar and Status Bar at the bottom.

Quick Access Tool Bar

From the quick access tool bar you can find quick tools for Undo/Redo, Create a New Org Chart, Open Files, Save, Print and the Export functions. You can hide or add any of these buttons by clicking the mini Down Arrow on the right. You can also choose to place the quick access bar on the top or at the bottom of the Ribbon.
Ribbons

1. Home Tab

From the Home tab you can add managers, colleagues, subordinates, assistants and photos; choose layout types, optimizing layouts; hyperlinks, attachments, notes or comments; and set horizontal or vertical distances.

2. Page Style

The Page Style tab is where you can format your org chart. You can select a theme here and choose theme fonts and theme colors. You can even edit or remove the Background of your org chart, or custom your own Watermark.

3. Data

The Data tab is where you can set display option details and quickly import/export your org chart data from your local files. More specifically, you can define field, synchronize data, import/export data, set text fonts, titles and more information for an individual employee in the Data section.

4. Slideshow

From the Slideshow tab you can create slides one by one, or auto-generate your slides based on your sub-departments. Feel free to edit or remove any content in your slide pages and once finished, you can preview your work in full screen, and then export PPT or print.
5. Task

The **Task** option lets you to add, set and export **Gantt Charts**. You can create a new task by right-clicking the employee box, and choosing **Add Task** in the context menu. Alternatively, you can insert new tasks by directly hitting on the **Task > Add Task** option. Besides, you can set milestones, define task period, edit task names, update task progress and priority, and assign tasks to members.

6. View

The **View** tab shows different view options of your org chart. You can choose to zoom in or out your work, or review it in a whole page. The **Tree Outline View** allows you to edit **Data Field** content which synchronizes with the org chart in the work area.

7. Help

From the **Help** tab you can easily find related guides for reference including Tutorial, FAQ, Contact Us and many Keyboard shortcuts, and buttons to register or deactivate the software.
Right-Side Bar

The Right-Side Bar has 6 tabs in total: Style, Display Option, Property, Views, Tree, and Search.

1. Display Options

In the Display Options section, you can choose either to show or hide your employee’s photo, set the order, font, and filed etc. for displaying your employee details.

![Display Options Section]

2. Style

In the Style section, you can change the background color, background image, watermark, theme style, theme colors, and the overall text fonts.
3. Views Options

The Views Options provides a choice of the different display options of your data. Individual chart elements and data excluded from your choice are hidden in this mode. Usually, a systematic company organizational chart contains massive information of different categories. However, a person at a specific position may not always want to view all the data. For example, if you are an HR, you can click HR Details to view only information about human resources.
4. Data

In the **Data** section, you can see full details of an individual employee in your current org chart. For example, the name, title, photo, department, contact details and so on.

5. Tree

In the **Tree** section, you can quickly go through all the field information in your current org chart, and make adjustments by double-clicking one of the employee details.

6. Search

In the **Search** section, you can search for any specific employee information in your org charts, such as a name, title, location, gender, and department etc. Furthermore, you can also search for numbers like salaries, the work performance ratio etc.
START AN ORG CHART

You have three options to start an org chart:

**Option A:** Double-click one of the org structure icons in File > New > Blank Templates. Your org chart will be created based on the selected type.

**Option B:** Double-click one of the org chart template or example in File > New > Local Examples. You can personalize the selected org chart template or example that are fully editable.
Option C: Left-click one of the org chart template or example in the File > New > Local Examples, then left-click the Create button to start your customization.

SYSTEM REQUIREMENTS

- Windows 2000, XP, Vista, Windows 7, Windows 8 and Windows 10
- Mac OS X 10 and later
- Linux (Debian, Ubuntu, Fedora)
- At least 1 GB RAM
- At least 850 MB free disk space

FOR ASSISTANCE

If you have further problems, please contact support@edrawsoft.com.
CHAPTER 3 BOX BASIC OPERATIONS

KEYBOARD SHORTCUTS TO ADD BOXES

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<tr>
<td>Assistant Box</td>
<td>Alt + Enter</td>
</tr>
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ADD A MANAGER BOX

*(Shift+Enter)*

You can add a manager in two ways.

1. Select a box, then press Shift+Enter keys on the keyboard.
2. Select a box, then click the Add Manager Button on the Home tab.
3. Move your mouse on a box, then click the floating button above the box.

ADD A COLLEAGUE BOX

*(Enter)*

You have 3 options to add a colleague box.

1. Select a box, then press the Enter key on the keyboard.
2. Select a box, then click the Add Colleague Button on the Home tab.
3. Move your mouse on a box, then click the floating button.

ADD A SUBORDINATE BOX

*(Insert/Ctrl+Enter)*

To add a subordinate box, you can:

1. Select a box, then press the Insert or Ctrl + Enter on the keyboard.
2. Select a box, then click the Add Subordinate button on the Home tab.
3. Move your mouse on a box, then click the floating button.
ADD AN ASSISTANT BOX

*(Alt+Enter)*

If you want to add an assistant box, please use the three ways:

1. Select a box, then press **Alt + Enter** on the keyboard.
2. Select a box, then click the **Add Assistant** button on the **Home** tab.
3. Move your mouse on a box, then click the floating button 🔄.

SELECT BOXES

You can select boxes by types or levels. Click the **Select** button on the **Home** tab. Alternatively, you can right-click a box and go to the **Select** option to add the one of the following types:

- All Boxes
- All Assistants
- All Managers
- All Non-Managers
- All Lowest Level
- Direct Managers
- All Colleagues
- Same Level
- All Subordinates
MOVE BOXES

You can move a targeted box to different directions, such as moving it up, down, left or right between different levels.

Drag and Drop to Move a Box

You can freely re-position any boxes on your org charts by simply dragging and dropping it to a new position. A visual sign will show you where a box will be moved to. Any of your boxes (except the very top position) can be rearranged and moved into different positions.

DELETE BOXES

Delete Selected Boxes

You can delete selected boxes while keeping all of its subordinate boxes.

1. Select the target box, or boxes.

2. Right-click and choose the Delete Selected.
3. The selected box, or boxes, will be deleted.
4. The remaining subordinate boxes will be promoted up one level.

![Delete Selected](image)

**Delete a Selected Box and All of Its Subordinate Boxes**

You can delete a box with all its subordinates boxes.

1. Select a box.
2. Right-click and then select the **Delete**.
3. The box and all of its subordinates will be deleted.

**CUT, COPY AND PASTE BOXES**

*(Ctrl+X/Ctrl+C/Ctrl+V)*

Use the **Copy** and **Paste**, you can quickly duplicate a selected box or branch, then paste it as a subordinate or colleague box to any of your existing boxes.

1. Select the box or branch that you want to copy.
2. Go to the **Home** tab and click the **Copy** button (or press **Ctrl + C**).
3. Select a box, or click anywhere on the blank area and click the **Paste** button (or press **Ctrl + V**).

**Tips:**

You can also use the **Cut** and the **Paste** to move a box from one place to the other.

**SHOWING PHOTOS ON THE BOXES**

*(Ctrl+Shift+P)*
Org Charting allows you to insert a photo into a box in many formats like GIF, JPG, PNG, ICO, BMP, and TIF etc.

Insert a Photo from Files

1. Select a box.
2. Click the Insert Photo button in the Home tab, or press Ctrl+Shift+P to insert.
3. Select a photo from your PC.
4. Press the Open.
5. Drag the selection handle to adjust the size of your photo.

Tips:

1. Your photo will be automatically adjusted to fit the size.
2. The default position of the photo will be added to the left side of the box. You can change the position of the photo by selecting the drop-down menu of the Position.

INSERT AN ATTACHMENT

(Ctrl + H)

OrgCharting supports inserting attachments without quantity limitation. Attachments can be saved automatically in the org chart.

1. Click a box.
2. Click Insert Attachment on the Home tab or right-click the topic and choose Insert Attachment option.
3. Press Path to select an attachment.
4. Change name for attachments if necessary.
5. Click **New** to add more attachments.
6. Click **Delete** to remove an attachment.

**Tips:**
Attachment icon is on the top right corner of topic. Hover the mouse cursor on the icon you can see the name of the attachment. Click the attachment name to open the attachment.

**INSERT A HYPERLINK**

*(Ctrl + K)*

Hyperlink is convenient for org chart references as external documents including current documents, files and applications, and internet addresses.

The hyperlinks can link to any of the following:

1. Another page or shape in the current document
2. A file or application
3. A folder
4. A Web URL
Add a Hyperlink to an Existing Shape or Page

1. Select a box you want to add hyperlink to.
2. Click Insert Hyperlink on the Home tab, or Right-click the box and choose Insert Hyperlink option.

![Hyperlink dialog box]

4. To link to a specific shape, you can choose a shape ID from the shape list.
5. Click New to add more hyperlinks.

Add a Hyperlink to a Web URL

1. In the Type list, choose Internet Address.
2. In the Address box, type the address of a Web site, FTP site, or e-mail address (beginning with http://, ftp://, or mailto: respectively).
3. In the Description box, type a name for the link. This text will appear on the hyperlink icon.
4. Click New to add another hyperlink.
5. Click OK.

Add a Hyperlink to File or Application

1. In the Type list, choose the File or Application.
2. Click Browse and navigate to a file.
3. In the Description box, type a name for the link. This text will appear on the hyperlink icon.
4. Click OK.
Change or Delete a Hyperlink

1. Select the shape to change or delete a hyperlink on a shape.
2. Click **Hyperlink**.
3. To change a hyperlink, select the hyperlink in the hyperlink list, make the changes that you want, and then click **OK**.
4. To delete a hyperlink, select the hyperlink in the hyperlink list, click **Delete**.

**Tips:**
Hyperlink icon is on the top right corner of topics. If you move the pointer to the icon, you will see a link for you to click.

ADD A COMMENT

*(Ctrl + Shift + T)*

Commenting on the specific box by a collaborative team is a highlight for synergy. You can receive praises and suggestions from your mates and supervisors directly with base of Cloud.

1. Click the box that you need to comment.
2. Click **Insert Comment** on the toolbar or Right-click the topic and choose **Insert Comment** option.
3. Type comments in dialog box.
4. Click **Send** after you editing all the comments.
5. Click **Modify** in the bottom of dialog box to edit the current comment.
6. Click **Delete** to remove a comment.

![Comment for current shape](image)

When a comment is added, there will be a green chatting icon showing on top right corner of the box. If you move cursor to the icon, you will see your name, date and comment.

**Tips:**

1. Before commenting, make sure you have signed in OrgCharting cloud account. If not, the commenter’s name will be the computer user’s name.
2. You can add more comments at the same box.

ADD NOTES

\((Ctrl + T)\)

As org charts are always concise, details could not be put into the main body. Notes can solve the problems of inadequate information. You can add notes in the format of texts, pictures and tables to enrich your org charts.

1. Select targeting boxes.
2. Click **Insert Note** on the **Home** tab, or Right-click the box and select **Insert Note** option.
3. Type in your note from the pop-up Note window.
4. Click **Picture** icon to add pictures.
5. Click **Calendar** icon to insert date.

6. Edit text formats with text formatting options on the toolbar.
7. To check your notes, hover the cursor over the **Note** icon.
CHAPTER 4 ORG CHART LAYOUT OPTIONS

CHANGE THE ORG CHART LAYOUT

The arrangement of shapes in an org chart is controlled by the chart’s general layout options. With the layout options, you can change the overall chart arrangement and growth directions of all shapes.

Change the Overall Chart Layout

1. Select the top box.
2. Go to Home Tab and click Layout button. Or go to the Right Side Panel, and click Layout button under Style section.
3. Select the layout style of the overall org chart.

Optimize Layout

The Optimize Layout button in Home tab allows OrgCharting to apply the best style for your org chart which suits the width of the screen.
**Horizontal and Vertical Distance**

The distance between shapes is defaulted both horizontally and vertically. The unit of the distance is millimeter and the default value is 20 in both horizontal and vertical direction.

To adjust the default distance value, you can:

1. Go to **Home** tab, click the up or down arrow to increase or decrease the distance.
2. Press **Enter** to set the adjustment to your chart.
3. Or type in the number you need in the blanks directly and press **Enter**.

**Tips:**

1. The maximum value is horizontal 200 and vertical 200, and the minimum is horizontal 20 and vertical 20.
2. This function can only adjust the distance between all shapes on the whole.
Apply a Theme

The default appearance of an org chart is determined by its underlying chart Theme. A chart theme is a collection of the default format settings used for the various types of elements in your chart, including a set of theme colors, theme fonts (both heading and body text fonts), and theme effects (both lines and filling effects).

Click the Theme button from either the Page Style tab of the ribbon, or Style panel of the Right Side Panel.

Drag the scroll bar to choose your desired theme.
Change Theme Font and Theme Color

The automatic formatting for all the shapes and objects on the chart is determined by the chart’s theme. After selecting a theme, you still have a choice of changing theme fonts and theme colors.

1. Click anywhere on the blank area.
2. Go to Theme section under the Style panel on the Right Side Panel.
3. Then click the Theme Font and Theme Color buttons.

**Themes:**

![Theme Font and Theme Color buttons](image)

**Tips:**

You can set a default font for your chart, and use the default font instead of the theme font.

Go to the Options menu, click Theme, and tick “Use default font instead of theme font”, then choose a default font for your chart.

**BACKGROUND**

To set a chart background, you can use either a background color or a background image. You can also apply a watermark on your background. The whole set of background formatting could be found under Style section of the Right Side Panel and Page Style tab on the ribbon.

**Background:**

![Background options](image)
Background Colors

Click the background color button to fill the background with single color.

![Background Colors]

Background Images

Edraw Org Charting has a wide range of predefined background images to enhance the look of your chart. You can add these background images from the right sidebar, or upload your own background images from local disk.

Add a Background from the Library

1. Click the **Background Pictures** button.
2. From the pull-down list, choose your preferred background image.

Add a Background from Local File

You can insert your own image as background.

1. Click the **Background Pictures** button.
2. Click **Browse from file** and navigate to the image file.
3. You can drag any image from a file list on the Internet (for example, from Google) into the image preview area in the dialog to add it as a chart background.
Add a Background Watermark

This function lets you print over every page of a document with certain text, which is useful for security or content identification.

You can add a watermark to your org chart via the following steps:

1. Click the Background Watermark button.
2. Choose a pre-made watermark from thumbnails in the drop-down control.
3. If you do not need the pre-made ones, you can click Customize Watermark to create your own one.
4. From the Custom Watermark pop-up window, you can adjust the text, font, size, color or layout of your watermark.
5. Click Remove Watermark when you don’t need it.
Remove Background

To remove the background, click the button Remove Background.

CHANGE SHAPE FILL COLOR

Fill refers to the interior of a shape. You can change shape fill color by the following steps:

1. Select a shape.
2. Click on the Style icon to open the right sidebar.
3. On the Style panel, click the fill icon to choose your desired color to fill the selected shape.

No Fill

To make a shape colorless, or to remove fill from a shape, you can choose the "No Fill" option.

Theme Colors

The top section of the Fill colors are Theme Colors. They are predefined color sets of the current theme.
More Colors

To use colors that are excluded from the theme colors or standard colors, click More Colors.

From the pop-up window, you can:

- Choose a color from the color swatch.
- Select a color from the color palette.
- Click "pick screen color" to pick a color.

Transparency

To change the transparency, you can move the Transparency slider, or enter a number in the shape next to the slider. You can vary the % of transparency from 0 (fully opaque, the default setting) to 100% (fully transparent).
Gradient Fill

Click More... to find the Gradient Fill option and add a gradient fill to a shape. (Gradient: A gradual progression of colors and shades, usually from one color to the other, or from one shade to the other shade within the same color).

Gradient Type

To specify the direction when drawing your gradient fill, select an option from the list. The Type that you selected determines the available Direction.

Gradient Direction

To choose a different progression of colors and shades, click Direction, and then click your preferred option. The available Directions depend on the Gradient Type that you have chosen.

Angle

To specify the angle of the gradient fill which is rotated within the shape, enter your preferred degree value. This option is available only when you have selected Linear as the Type.

Gradient Stops

Gradient stops consist of a position, a color, and a transparency value. The transparency value applies to the gradient stop instead of the overall fill. Gradient stops can create non-linear gradients. For example, if you want to create a gradient that goes from red, green to blue, you need to add three gradient stops - one for each color. Alternatively, if you want to create a
gradient that shows up only in a corner of a shape, you need to use gradient stops to make the gradient non-linear.

**Add:** Click the green Add icon + to add a stop.

**Remove:** Click the Red Cross × icon to delete a stop.

*Stop position*

To set the location for the color and transparency change in the gradient fill, please move the-stop position slider or enter a number in the shape below the slider.

![Gradient stops](image)

*Color*

To choose the color of the gradient stop, click **Color**. To use a color that is not in the theme colors, click **More Colors**.

*Transparency*

To specify how much you can see about the shape at the specified Stop position, please move the Transparency slider or enter a number in the shape next to the slider. You can vary the % of transparency from 0 (fully opaque, the default setting) to 100 (fully transparent).

*Pattern Fill*

You can also fill a shape with a predefined pattern.

1. Click the More... from the Fill drop-down menu.
2. From the pop-up dialogue, click **Hatch Fill**.
3. Choose a hatch from the predefined hatch gallery.
4. Change the Front and Background color of the hatch.
CHANGE SHAPE SHADOW

On the Style panel, click the Shadow button in Shape group, and then choose your preferred built-in shadow effect.

If you cannot find your preferred ones above, click “More...” to create customized shadow. This function lets you set customized shadow color, effect, or offset.
**Shadow Color**

To choose a color for the shadow, click Color in the Shadow dialogue, and then click your preferred color. To change to a color that isn’t in the theme colors, click More Colors.

**Shadow Transparency**

To specify how much you can see about the shadow, move the Transparency slider or enter a number in the shape next to the slider. You can vary the % of transparency from 0 (fully opaque, the default setting) to 100 (fully transparent).

**Shadow Size**

To specify the size of the shadow based on the original object, please move the Size slider or enter a value in the shape next to the slider.

**Shadow Blur**

To set blur radius on the shadow, please move the Blur slider or enter a value in the shape next to the slider. The larger the radius, the blurrier, or “fuzzier”, the shape or line will be.

**Shadow Angle**

To specify the angle of your shadow, please move the Angle slider or enter a value in the shape next to the slider. By using the Angle and Distance options together, you can place the shadow anywhere relative to the shape.

**Shadow X Offset and Y Offset**

To set a distance for an Angle of the shadow, please enter a value in the shape next to the slider.
CHANGE COLOR AND STYLE OF SHAPE BORDER

1. Select the shape you want to change.
2. On the Style side panel, in the Border group, you can change border color, line weight, dash type and line round.

**Border:**

- To change the border color, click the Line Color button, and then choose your preferred border color.
- To change the shape corner roundness, click the Line Round button, and then click your preferred line round.
- To change the border weight, click the Weight button, and then choose your preferred line thickness.
- To change the border dash style, click the Dashes button, and then click your preferred line style.

CHANGE SHAPE FONT

1. Select a shape or multiple shapes.
2. On the Style side panel, in the Font group, change the text font type, font size, align, bullet, bold, italic, underline, line spacing, or text color.

**Font:**

Click the following buttons to achieve corresponding font effects:

- **B** Bold the selected text.
- **I** Italicize the selected text.
- **U** Underline the selected text.
- **abc** Draw a line through the middle of the selected text.
- **Align selected text to a special edge.**
- **Highlight the selected text.**
- **Change the text color.**
- **More font options.**
CHAPTER 6 DATA

VIEWS OPTIONS

The Views Options provide a choice of the different display options of your data. Individual chart elements and data excluded from your choice are hidden in this mode.

This area is located at the right side panel. Usually, a systematic company organizational chart contains massive information of different categories. However, a person at a specific position may not always want to view all the data. For example, if you are an HR, you can click HR Details to view only information about human resources.

Add New View

Please be noted that the views displayed on the picture above are predefined and cannot be deleted. You can add new views to your org chart and the customized views are deletable.

Follow the steps below to add a new view:
1. Go to Views Options on the Right Side Bar, click the Add New View button.

![Add New View](image)

2. Type in the name of the new view and click OK. Here I name it “Hobbies & Interests”.

![Add New View](image)

3. The new view appears at the bottom of the predefined views.

![Views Options](image)

If you need to delete the customized view, select the view and click the Delete Selected View button.
Note:

When there is no customized view, the Delete Selected View button is gray, and it turns red if a customized view is selected.

Define Field

The Define Field function supports to define a new data field that is not covered in the predefined data fields. The newly defined data field will be saved in the data field panel together with the predefined ones, and available to be added to your chart or a custom view anytime.

The steps below instruct you to add customized field to the org chart:

1. Go to the Views Options on the Right Side Bar, click the Define Field button. The Define Field window pops up.

2. Click Add Field. A new field “Property 1” appears at the bottom of the predefined data fields. Double click and rename the newly added field. Here I name it Fund.
3. Click the triangle to choose the data type in the drop down menu.

After you have checked the newly added field, you can choose to display it or not in the Display operation of Display Options.

DISPLAY OPTIONS

The Display Options menu allows you to choose what data to display on your boxes of the current view. It also lets you set the box width/height, photo position, content layout and interval, etc.

Select a box and go to the Display Options on the right panel to open the Display Options menu.
**Apply Options**

The Apply Options operation allows you to quickly set the range and locations of the changes in your chart. With a single mouse click, you can affect everything from the data in individual box to the look of selected boxes, same level boxes, all colleagues boxes, all subordinate boxes and even the entire chart.

**Display**

The **Display** menu determines the visual appearance of the data in a box. It determines what is visible or not. To change this, check or uncheck the **Show** box on the right of each property.

**Layout**

The **Layout** option determines the layout and alignment of data inside a box.
**Distance**

The “Vertical” and “Horizontal” refers to the interval of the content blocks. The unit of the distance is millimeter and the default value is 5 in both horizontal and vertical direction.

![Distance Units](image)

To adjust the default distance value, you can:

1. Click the up arrows and down arrows to increase or decrease the number.
2. Press Enter to set your adjustment to your chart.
3. Or input the number you need in the blanks directly and press Enter.

**Tips:**

To change the distance between boxes of a certain part in the chart, select the certain boxes first and then follow the steps above.

**Change Data Layout Inside a Box**

1. Select the target box, and the current data layout inside the box appears on the Layout window.

   ![Layout Window](image)

2. Drag and drop the bars in the **Layout** window to realign corresponding current data elements in the box. The red line reminds where you can drop the bar.

   ![Data Layout](image)

3. After you’ve finished the realignment, you can see the updated box in both the canvas and the **Layout** window.
Tips:

In OrgCharting, you can add separation lines in between of two adjacent content sections.

1. Hover the pointer on blank gaps between content sections and a black line appears.

2. Click the black line, and a corresponding border appears in the box.

Show Photos on a Box

1. Select a box.

2. Click the Display Option on the right panel.

3. Tick the Show Photo box.

4. Change the position of the photo by selecting the drop-down menu of the Position. It determines whether the photo will be aligned.

Change a Box Size

You have two ways to change a box size.

1. Select a box, then drag and drop the blue connectors at the corners of the box to change its size.

2. Select a box. Click the Display Option on the right panel to input the Width and Height figures.

Change Font for Each Data Field

Each data field of the box could be adjusted based on the following simple steps:

1. Select a box.
2. Click the **Display Option** on the right panel.

3. Click the **Font** button to change a single data field.

![Data display and edit](image)

**Display and Edit Data of a Box**

1. Select a box and go to Right Side Bar, then click Data button. The menu displays the visible box data and hidden box data as in an example below.

2. Double click the data you want to edit and type in the correct information.

![Data display and edit](image)

**Search Data**

To search a box that contains specific data, you can use **Search** option.
IMPORT WIZARD

Importing files is a powerful and efficient way to take bulk data in other file format (such as Excel) and convert them into captivating, easy to understand org charts. OrgCharting can import files in .txt, .cvs, .xls, .xlsx and .sql formats.

To open the Import Wizard - go to the Data tab and select Import Wizard.

Tips:
1. The data you intend to import must have correct reporting relationships for the import to succeed.
2. Until the final (Finish) screen, you can move back and forth through the wizard to change your choices before you commit to the final import.

Import Wizard

To import a data file, launch the wizard and proceed through the following screens.

Import Wizard - Select Source
1. This screen is used to choose which file to import (see below).
This screen is the first step for all supporting formats. To complete this page, choose one of the following options:

- Click the **Browse** button. The **Open** menu will appear.
- **Next** - proceed to the next Import Wizard screen.
- **Cancel** - close the Import Wizard without saving and return to the main work area.
- Get help from “How to create an organizational chart from data...”.

**Tip:**

When you click **Browse**, there will be 5 sample data source which you can use as demos. If you don’t need the samples, simply go and navigate your own data files.

2. **Modify data and define Name and ReportTo**

During this step, you need to select the Name column and ReportTo column correctly, so that the chart could be built in the right hierarchy.

3. **Set data field and display options**

Display on shape determines what data field will be shown in each box of the org chart. OrgCharting shows Name, Title and Department by default. You can choose to show more data by clicking the check boxes.
4. Click Finish to complete the wizard and return to the main work area.

DATA SYNCHRONIZATION

OrgCharting provides the latest dynamic project creation through Data Synchronization. This tool can be used to update an org chart’s information in almost real time. You can constantly update your org chart by linking it to a database containing your latest information. To enable Data Synchronization function, the information must first be imported from an external database file.

After you’ve created an org chart with the imported, you can use Data Synchronization under Data tab.

Resync Data Only

(Shift + R)

Resynchronize data of existing org chart. This option synchronizes data on boxes only. It won’t change the relationship nor add or delete shapes.

Resync Entire Chart

(Ctrl + Shift + R)
Resync Entire Chart gets the whole chart rebuilt according to the updated data source, including both data and the relationship.

**QUICK EXPORT**

*(Ctrl + Shift + Q)*

This function supports to export the data displayed on the chart quickly to the following formats:

- Excel Workbook (*.xlsx)*
- Excel 2003 Files (*.xls)*
- Text Files (*.txt)*
- CSV Files (*.csv)*

**EXPORT WIZARD**

*(Ctrl + Shift + E)*

Exporting is the process of saving org charts in formats that can be opened and utilized by other programs. You can choose what specific data you want to export. This function supports to export the data displayed on the chart quickly to the following formats:

- Excel Workbook (*.xlsx)*
- Excel 2003 Files (*.xls)*

After you have selected the data fields you want to export and add them to the “Fields to export” box on the right of the window, click Export to choose a storage location.
CHAPTER 7 SLIDE SHOW

In Slideshow tab, you can create and manage a set of slides for a chart. This can help focus attention on a specific part of your chart or present the whole chart as slide show branch by branch.

Once you have created slides, you can display them in a slide show, print, or export these slides to Microsoft Power Point.

CREATE SLIDES FROM CHART AUTOMATICALLY

Edraw Org Charting software lets you create a set of slides based on chart branches with one button click. All slides are automatically generated from your chart branches one by one.

1. Go to Slideshow tab and click Auto Create button.
2. The slides are created, and you can see thumbnails of the auto-created slides on the Slide Preview panel. The first slide is the top management hierarchy and the rest of the slides are the branches at lower levels.
CREATE SLIDES MANUALLY

If you don’t want auto-created slides, you can create them manually and choose which branch or box you want to add into the slideshow.

1. On the Slideshow tab, click the button **New Slide Deck**.

2. A pop-up window will show to let you name the new slide deck.

3. Type the name of your New Slide Deck and click **OK**.

4. A new slide deck is created.

ADD SLIDE PAGES

Once you have created a slide deck, you can add new slide page to the slide deck. Any shapes or branches could be added as a slide page.

1. From the Slide Preview panel, select the Slide Deck you need to add pages.

2. Go to your chart, select a branch or shape, and click the **Add Slide** button on the Slideshow tab.

3. The branch or shape is successfully added as a slide page. You can see it on the Slide Preview panel.

RENAME SLIDE PAGES

Options of renaming a slide page are as follow:
1. Select a slide page from the Slide Preview panel, click Rename button  on Slideshow tab or Slide Preview panel and type your preferred name.

2. Double click the slide page name and edit the name directly.

3. Right click a slide in the Slide Preview panel and click Rename in the context menu, you will see its current name turn blue so that you can type your preferred name.

SLIDE PREVIEW

Once a slide is created, the slide preview panel will open automatically. You can close or reopen the slide preview panel by click the Slide Preview button  on the Slideshow tab. Click a slide thumbnail in the Slide Preview panel, and you can preview the full slide page in the main window. Close the full slide page preview by clicking the close button  on the top.

REORDER SLIDE PAGES

Right-click on a slide preview thumbnail, and click Move Up or Move Down.
DELETE SLIDE PAGES

To delete a slide page, you can:

1. Select the slide page in Slide Preview panel and click Remove Current button.
2. Right click the slide in the Slide Preview panel and click Delete Page in the context menu.

DELETE THE WHOLE SLIDE DECK

To delete the whole slide deck, you have the following options:

1. Click Remove Slide Deck button.
2. Right click the slide in the Slide Preview panel.
3. Click Delete the Current Slide Deck in the context menu.

TRAVERSE BOXES OR BRANCHES IN FULL SCREEN MODE

(F5, Shift + F5)

In the full screen mode you can navigate and highlight specific shapes or branches with the direction arrow keys.

1. You can click the Present by Boxes or Present by Branches option.

2. You can also click the Full Screen icon on Slideshow tab to view your document in full screen mode.
DISPLAY A SLIDE SHOW

Click the **Play Slides** button on **Slideshow** tab or on **Slide Preview** panel to start a slideshow from the first slide.

**Navigate the Slides**

There are three ways to navigate your slides in slide show view.

1. Press the **Down** or **Right** arrow of your keyboard to jump to the next slide. Press the **Up** or **Left** arrow to go back to the previous slide.
2. Click your mouse once on anywhere of the screen to jump to the next slide.
3. Move the cursor to the lower part of the canvas, a tool bar covering seven buttons will appear. Click the up and down arrow buttons to navigate your slides.

![Tool Bar]

Click the following buttons to achieve corresponding effect:

- Broadcast automatically.
- The previous page.
- The next page.
- Zoom in.
- Zoom out.
- Fit in view.
- Close the slide show.

**Exit from Slide Show Mode**

You can end the slide show by pressing the **Esc** key on your keyboard, or click the **Close** button on the slide show tool bar.
EXPORT SLIDES TO MICROSOFT POWERPOINT

You can export the slide show to Microsoft PowerPoint format. Simply click Export Slides to PPT button.

Tips:

For the exported .pptx file, only PowerPoint 2013 and later versions can open it correctly.

PRINT SLIDES

1. Click the Print Slides button on Slideshow tab, or on the Slide Preview panel, then you can see the print setting and preview interface.

2. Set your printing options and then click the Print button.
CHAPTER 8 WORKING ON TASKS

USE GANTT CHART VIEW

Gantt chart is effective for monitoring project status and progress. You can manage task information directly in the Gantt Chart view.

Open the Gantt Chart View Panel

1. Click the Task tab on the Ribbon.
2. Click the Gantt Chart button to display based on a Gantt Chart.

SET GANTT CHART OPTIONS

You can set many task details such as date formats, major and minor units, work days, whole project start and end time etc. Simply follow the below steps to set your Gantt chart.

1. Click the Task tab in the menu bar and then click the Gantt Chart Option button.
2. You can set the following options for your Gantt chart.
   a. Select a date format in the drop-drag Date Format menu.
   b. Tick a working day from Monday to Sunday.
   c. Select the Major Unit and the Minor Unit in the corresponding drop-drag menu.
   d. Set the Duration and the Duration Unit in the corresponding drop-drag menu.
   e. Set the Start Date/Time and the Finish Date/Time in the corresponding drop-drag menu.

MODIFY TASK INFO IN THE GANTT VIEW

Each task is presented as a taskbar in the Gantt Chart. You can move or drag a taskbar to change its start and end date. You can also build task dependency in the Gantt Chart view.

1. Rename a Task
   Double-click the cell in the Task Name column to rename the task.

2. Change Task Start and End Date
   Drag the right border of the bar to change the bar length. You can also select and move the whole bar to change its position on the calendar.
3. **Change Task Complete %**
   
   Put the cursor on the left border of the taskbar, then hold the mouse and drag to the right direction until a green area has shown up. The green area means how much the task has been completed.

4. **Build a Task Dependency**

   Click on a taskbar, then hold the mouse and drag it to another taskbar to build a relationship.

5. **Change the Date Unit Size**

   Click the “+” and “-” button on the top right corner to change the date unit size.

---

**SET MILESTONE**

If tasks are set, you are allowed to set milestones for your tasks. Go to the **Task** tab on the ribbon and click the **Milestone** button, then the selected taskbar will be shifted to a diamond shape icon.

**EXPORT GANTT CHART**

The **Export Gantt Chart** option will help you save the Gantt chart in PDF format, which is convenient for users to print or share the Gantt chart with others.

1. Go to the **Task** tab on the ribbon and click the **Export Gant Chart** button.
2. Input a name of your Gantt chart in the pop-up window.
3. Click the **Save** button.
CHAPTER 9 GENERAL ACTIONS ON DOCUMENTS

FIND AND REPLACE

(*Ctrl + F*)

Find and replace command helps you check the specific word within the whole org chart including employee name, titles, note, comment, department, salaries and so on.

1. Go to the **Home** tab and click the **Find & Replacement** button. A pop-up dialogue will show up.
2. Type content you intend to find in the find column, and click the **Find** icon.
3. Type content you intend to replace in the replace column, and click the **Replacement** icon.

![Find & Replace dialogue](image)

**Tips:**

1. If you want to filter capital words only, you can click **Case sensitive** for precision.
2. If you want to reduce the scope of finding, please click **Whole words only**.

SPELLING CHECK

(*F7*)

Spelling check function of OrgCharting helps you diagnose spelling mistakes and offer suggestions for correct spellings.

1. Go to **Home** tab and click the **Spelling Check** button.
2. If there are mistakes in your file, the **Spelling Check** dialogue will show up. It will show all recommended spellings for you to choose.
3. Choose one of the suggestions and click **Accept**, or **Ignore** if the word is not wrong.
4. Once you click the **Accept** or **Ignore**, it will jump to the next spelling mistake, and repeat until there are no mistakes.

5. For the word which is correct but not in the dictionary, you can click **Add to Dictionary**, so that it won’t be treated as a wrong word next time.

![Image of Spelling Check]

**Tips:**

Up to 5 languages can be checked in OrgCharting including English (for GB and for USA versions), German, French, Italian, and Spanish. You can change a dictionary before start.

![Image of Dictionary Options]

**UNDO AND REDO**

*(Ctrl+Z / Ctrl+Y)*

OrgCharting provides undo and redo actions for users.

**Undo (Ctrl + Z)**

Undo is used to reverse your last action. Click Undo button on the quick access toolbar, or press Ctrl + Z.

**Redo Typing (Ctrl + Y)**

Redo is used to do any undo function again. Click Redo button on the quick access toolbar, or press Ctrl + Y.
CHAPTER 10 OPEN, SAVE, FIND, RECOVER, PRINT, EXPORT AND SHARE ORG CHARTS

OPEN AN ORG CHART

To open an org chart made by OrgCharting, you can:

1. Go to the **File** tab and click **Open**, then you can choose to open an org chart from Recent Documents, Computer, Personal Cloud, or Team Cloud.

2. Drag an org chart and drop it on the top of the program.

SAVE AN ORG CHART

*(Ctrl + S, Ctrl + Shift + S)*

You can save your org chart using **Save** or **Save As** commands.

1. Go to the **File** menu, click **Save** or **Save As**.
2. Enter a name and choose a location to save your file. Location can be the local disk, personal cloud, or team cloud.
FIND AND RECOVER AN AUTO SAVED FILE

OrgCharting creates auto-saved temp file for users in case they didn’t save the files due to unexpected computer shutdown or software crash. Users can set a time frequency for each auto save. The default setting is every 10 minutes.

Set Auto-Save Time Period

1. Go to the File tab, click Options and then click General.
2. From the Save auto recover option, input a time period.

Find Auto Saved File

1. Go to the View tab, click the File Recovery button.
2. Find your auto saved files from the file recovery list.

PRINT AN ORG CHART

Go to the File tab, and click the Print button to print a chart; or click the print button in the Quick Access Bar.
**Orientation**

Specify the paper orientation as portrait or landscape.

**Paper Size**

Shown in the list are the paper sizes supported by the current printer as well as industry standard sizes.

**Print Setup**

Click the **File** tab, click the **Print**, and then click the **More Print Setup...** to set the print options.

---

**Adjust to**

Reduces or enlarges the drawing page to a specified proportion of actual size for printing. If the drawing page is larger than the size of one piece of paper, the diagram will be printed onto multiple pieces of paper.
**Fit to (sheets across by sheets down)**

Fits each drawing in the print job on the specified number of sheets across and down. Depending on the number of pages and the margins you specify, the drawing will be enlarged or reduced. If the pages across and down are not proportional to the drawing’s dimensions, only those sheets maintaining the drawing’s proportions will be used.

**EXPORT AN ORG CHART**

You can export your charts to different formats including PDF, Microsoft Office, Graphics, Html and SVG etc.

**Export to Graphic Format**

You can export your org charts to graphic formats including .jpg, .png, .bmp, .gif, .ico, .tif, .ppm, etc.

1. Go to the File tab.
2. Click Export & Send.
3. Click Graphics
4. From the “Save as type” list, choose a graphic format and save.

**Export to Editable PDF**

1. Go to the File tab.
2. Click **Export & Send**.

3. Click **PDF, PS, EPS option**.

4. Choose **PDF Vector Format** to export org charts to editable PDF files.

**Export to Editable MS Office File**

This feature lets you export org charts to editable MS Office files including .docx, .pptx, and .xlsx.

1. Go to the **File** tab.

2. Click **Export & Send**.

3. Click the **Office option**.

4. Choose **Word, PowerPoint, or Excel**.

**Export to Html**

1. Go to the **File** tab.

2. Click **Export & Send**.

3. Click **Html button**.

**Export to SVG Format**

1. Go to the **File** tab.

2. Click **Export & Send**.

3. Click the **SVG option**.

**SHARE AN ORG CHART**

Once you have drawn an org chart, you can share it with your colleagues and friends based on links. Sharing org charts links is easy for people who have not installed OrgCharting to view anywhere and anytime.

**Sign Up an OrgCharting Account**

1. Click **Sign In button** on the top right of the user interface.
2. Click **Sign Up** to register an account.

![Sign Up](image)

**Share Your Org Chart**

1. Click **Share** button on the top right of the user interface.

2. Click **Copy** to share the link.

3. Scan the **QR Code** to share the specific link.

4. Copy the **HTML** code when using org charts in HTML.

**Set Share Management Options**

1. Click **Share Manager** button on the top right corner of the user interface.

2. Click the **File** you want to modify.

3. Click the **Expire Time** drop down menu to set expiry time.

4. Click **Copy Link** button to share the links.

5. Click **Cancel Share** to stop sharing with others.
CHAPTER 11 VIEW THE CHART

TREE OUTLINE VIEW

The tree outline view allows you to edit Data Field content which synchronizes with the org chart in the work area. Before opening the Tree Outline View, you need to choose a view you want to display in Views option first.

The operations are as follow:

1. Click Tree button in the View tab or right side panel. The Tree Outline View will show up.

2. Double click an item and type in texts to edit the Data Field content. You can also move a box or add Manager, Subordinate, Colleague and Assistant to a box in Tree Outline View.

3. If you need to close the Tree Outline View, click the Hide Panel button on the top right of the panel.

To change the size of Tree Outline View panel, follow these steps:

1. Place the mouse pointer over the edge of a panel.

2. When you see a pointer composed of a line and two arrows pointing to opposite directions, you can drag the pointer to resize the panel.
RULERS, GRIDLINES, ACTION BUTTON AND STATUS BAR

On the **View** tab, you can choose to show or hide rulers, grid lines, action button and status bar that may assist your OrgCharting work.

**Rulers**

Each drawing window has vertical and horizontal rulers that show measurements at the scale of the drawing.

**Gridlines**

The grid helps to position shape more precisely.

**Change Grid Spacing and Subdivisions**

Open **File** menu, click **Options**, and choose **Grid**. You can set grid spacing and subdivision by clicking the up and down buttons or entering a number.
Action Button

Action Buttons float around each box to assist your OrgCharting work. There are two types of Action Button in OrgCharting.

The is used to add Manager, Colleague and Subordinate.

The four buttons are used to collapse and expand the chart to different directions.

If you hide the Action Button, the box looks as the appearance below.

Status Bar

Status Bar is a horizontal bar at the bottom of the window, showing information about the program and the document being edited.
COLLAPSE AND EXPAND BOXES

You can collapse and expand branches of individual boxes interactively by using the ☐ and ☐ icons that appear on the right of each box that has subordinates (out of the box).

ZOOM

Open the Zoom dialog box to specify the zoom level of the document. In most cases, you can also use the zoom control in the Status Bar.

1. On the View tab, click Zoom button and choose a zoom percentage.

2. On the Status Bar, drag the Zoom slider.


4. Press Ctrl key while scrolling the mouse wheel to zoom in and out.

WHOLE PAGE

(F3)

Zoom the page so that the entire page, both vertically and horizontally, displays on screen.

Options are:
1. Click **Whole Page** button in the **View** tab.
2. Click the **Whole Page** button on the status bar.

**PAGE WIDTH**

*(Shift + F3)*

Zoom the page so that the width of the page matches the width of the window. Options are:

1. Click **Page Width** button in the **View** tab.
2. Click **Page Width** button on the status bar.

**FILE RECOVERY**

The File Recovery function shows the file recovery panel and find auto recovery files.
KEYBOARD SHORTCUTS

You can find the list of keyboard shortcuts any time on the ribbon’s Help tab by clicking the Shortcut Key icon.

<table>
<thead>
<tr>
<th>Function</th>
<th>Shortcuts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documents</strong></td>
<td></td>
</tr>
<tr>
<td>Create a new chart</td>
<td>Ctrl + N</td>
</tr>
<tr>
<td>Open a chart</td>
<td>Ctrl + O</td>
</tr>
<tr>
<td>Save the current chart</td>
<td>Ctrl + S</td>
</tr>
<tr>
<td>Save all charts</td>
<td>Ctrl + Shift + S</td>
</tr>
<tr>
<td>Close current chart</td>
<td>Ctrl + W</td>
</tr>
<tr>
<td>Close all charts</td>
<td>Ctrl + Shift + W</td>
</tr>
<tr>
<td>Print the current chart</td>
<td>Ctrl + P</td>
</tr>
<tr>
<td><strong>Navigating</strong></td>
<td></td>
</tr>
<tr>
<td>Select box (above, below, left and right)</td>
<td>Arrow keys</td>
</tr>
<tr>
<td>Select next box / previous box</td>
<td>Ctrl / Shift + Tab</td>
</tr>
<tr>
<td><strong>Window</strong></td>
<td></td>
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<tr>
<td>Feature</td>
<td>Key Combination</td>
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<td>-------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Zoom in</td>
<td>Ctrl + + (plus)</td>
</tr>
<tr>
<td>Zoom out</td>
<td>Ctrl + - (minus)</td>
</tr>
<tr>
<td>Fit chart to screen</td>
<td>Ctrl + F5</td>
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<tr>
<td>Fit chart to 100% zoom</td>
<td>Ctrl + 0</td>
</tr>
<tr>
<td>Whole Page</td>
<td>F3</td>
</tr>
<tr>
<td>Page Width</td>
<td>Shift + F3</td>
</tr>
<tr>
<td><strong>View</strong></td>
<td></td>
</tr>
<tr>
<td>Ruler</td>
<td>Ctrl + Shift + U</td>
</tr>
<tr>
<td>Gridlines</td>
<td>Ctrl + Shift + G</td>
</tr>
<tr>
<td>Status Bar</td>
<td>Shift + B</td>
</tr>
<tr>
<td>Action Button</td>
<td>Ctrl + Shift + A</td>
</tr>
<tr>
<td><strong>Interface</strong></td>
<td></td>
</tr>
<tr>
<td>Show / Hide Display</td>
<td>F6</td>
</tr>
<tr>
<td>Show / Hide Views</td>
<td>F9</td>
</tr>
<tr>
<td>How / Hide Tree</td>
<td>F10</td>
</tr>
<tr>
<td>Show / Hide Data</td>
<td>F8</td>
</tr>
<tr>
<td>Show / Hide Search</td>
<td>Ctrl + Shift + F</td>
</tr>
<tr>
<td>Spelling check</td>
<td>F7</td>
</tr>
<tr>
<td>Find</td>
<td>Ctrl + F</td>
</tr>
<tr>
<td>Preview</td>
<td>F11</td>
</tr>
<tr>
<td><strong>Slideshow</strong></td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Shortcut</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td>Play slideshow</td>
<td>Ctrl + Shift + F5</td>
</tr>
<tr>
<td>Traverse boxes</td>
<td>F5</td>
</tr>
<tr>
<td>Traverse branches</td>
<td>Shift + F5</td>
</tr>
<tr>
<td>Full Screen</td>
<td>Ctrl + F5</td>
</tr>
<tr>
<td>Exit Full Screen Mode or Stop Slideshow</td>
<td>Esc</td>
</tr>
</tbody>
</table>

### Adding Box

<table>
<thead>
<tr>
<th>Feature</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add first box</td>
<td>Enter</td>
</tr>
<tr>
<td>Add Subordinate</td>
<td>Insert / Ctrl + Enter</td>
</tr>
<tr>
<td>Add Colleague</td>
<td>Enter</td>
</tr>
<tr>
<td>Add Manager</td>
<td>Shift + Enter</td>
</tr>
<tr>
<td>Add Assistant</td>
<td>Alt + Enter</td>
</tr>
</tbody>
</table>

### Adding Elements

<table>
<thead>
<tr>
<th>Feature</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add attachment</td>
<td>Ctrl + H</td>
</tr>
<tr>
<td>Insert picture</td>
<td>Ctrl + Shift + P</td>
</tr>
<tr>
<td>Add hyperlink</td>
<td>Ctrl + K</td>
</tr>
<tr>
<td>Add comment</td>
<td>Ctrl + Shift + T</td>
</tr>
<tr>
<td>Add note</td>
<td>Ctrl + T</td>
</tr>
<tr>
<td>Optimize Layout</td>
<td>Ctrl + Shift + O</td>
</tr>
</tbody>
</table>

### Data

<table>
<thead>
<tr>
<th>Feature</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refresh data</td>
<td>Shift + R</td>
</tr>
<tr>
<td>Associate data</td>
<td>Ctrl + Shift + R</td>
</tr>
<tr>
<td>Feature</td>
<td>Shortcut</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Define field</td>
<td>Ctrl + D</td>
</tr>
<tr>
<td>Quick export</td>
<td>Ctrl + Shift + Q</td>
</tr>
<tr>
<td>Import</td>
<td>Ctrl + Shift + I</td>
</tr>
<tr>
<td>Export wizard</td>
<td>Ctrl + Shift + E</td>
</tr>
<tr>
<td><strong>Editing</strong></td>
<td></td>
</tr>
<tr>
<td>Undo the last action</td>
<td>Ctrl + Z / Alt + Backspace</td>
</tr>
<tr>
<td>Redo the last action</td>
<td>Ctrl + Y</td>
</tr>
<tr>
<td><strong>Selecting</strong></td>
<td></td>
</tr>
<tr>
<td>Select all boxes and elements</td>
<td>Ctrl + A</td>
</tr>
<tr>
<td>Select all branches</td>
<td>Ctrl + Shift + B</td>
</tr>
<tr>
<td><strong>Move boxes</strong></td>
<td></td>
</tr>
<tr>
<td>Up one place</td>
<td>Ctrl + Shift + Up Arrow</td>
</tr>
<tr>
<td>Down one place</td>
<td>Ctrl + Shift + Down Arrow</td>
</tr>
<tr>
<td>To top</td>
<td>Ctrl + Shift + Home</td>
</tr>
<tr>
<td>To bottom</td>
<td>Ctrl + Shift + End</td>
</tr>
<tr>
<td><strong>Cut, Copy, Paste and Delete</strong></td>
<td></td>
</tr>
<tr>
<td>Cut</td>
<td>Ctrl + C</td>
</tr>
<tr>
<td>Copy to the clipboard</td>
<td>Ctrl + C / Ctrl + Insert</td>
</tr>
<tr>
<td>Format Painter</td>
<td>Ctrl + Shift + C</td>
</tr>
<tr>
<td>Paste</td>
<td>Ctrl + V</td>
</tr>
<tr>
<td>Selected Paste</td>
<td>Ctrl + Alt + V</td>
</tr>
<tr>
<td>Command</td>
<td>Shortcut</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Delete current object</td>
<td>Delete</td>
</tr>
<tr>
<td>Delete Current Branch</td>
<td>Shift + Delete</td>
</tr>
<tr>
<td><strong>Box Text</strong></td>
<td></td>
</tr>
<tr>
<td>Edit box text</td>
<td>F2</td>
</tr>
<tr>
<td><strong>Commands in Box Text Edit Mode</strong></td>
<td></td>
</tr>
<tr>
<td>Enter line break in box</td>
<td>Shift + Enter / Ctrl + Enter</td>
</tr>
<tr>
<td>Move to beginning of line</td>
<td>Home</td>
</tr>
<tr>
<td>Move to beginning of box text</td>
<td>Ctrl + Home</td>
</tr>
<tr>
<td>Move to beginning of box text</td>
<td>Ctrl + End</td>
</tr>
<tr>
<td>Cancel editing box</td>
<td>ESC</td>
</tr>
<tr>
<td>Find</td>
<td>Ctrl + F</td>
</tr>
<tr>
<td><strong>Commands in Find Mode</strong></td>
<td></td>
</tr>
<tr>
<td>Find next</td>
<td>Enter</td>
</tr>
<tr>
<td>Spelling check</td>
<td>F7</td>
</tr>
<tr>
<td><strong>Formatting</strong></td>
<td></td>
</tr>
<tr>
<td>Toggle to bold and back</td>
<td>Ctrl + B</td>
</tr>
<tr>
<td>Toggle to italics and back</td>
<td>Ctrl + I</td>
</tr>
<tr>
<td>Toggle to underline and back</td>
<td>Ctrl + U</td>
</tr>
<tr>
<td>Increase font size</td>
<td>Ctrl + Shift + &gt;</td>
</tr>
<tr>
<td>Decrease font size</td>
<td>Ctrl + Shift + &lt;</td>
</tr>
<tr>
<td>Edit text</td>
<td>F2</td>
</tr>
<tr>
<td>End Formatting</td>
<td>Esc</td>
</tr>
<tr>
<td>---------------</td>
<td>-----</td>
</tr>
<tr>
<td><strong>Layout</strong></td>
<td></td>
</tr>
<tr>
<td>Toggle up</td>
<td>Ctrl + Shift + F4</td>
</tr>
<tr>
<td>Toggle right</td>
<td>Ctrl + F4</td>
</tr>
<tr>
<td>Toggle down</td>
<td>F4</td>
</tr>
<tr>
<td>Toggle left</td>
<td>Shift + F4</td>
</tr>
<tr>
<td>Move to left</td>
<td>Ctrl + Left Arrow</td>
</tr>
<tr>
<td>Move to right</td>
<td>Ctrl + Right Arrow</td>
</tr>
<tr>
<td><strong>Export</strong></td>
<td></td>
</tr>
<tr>
<td>Export to graphics</td>
<td>Ctrl + G</td>
</tr>
<tr>
<td><strong>Using Help</strong></td>
<td></td>
</tr>
<tr>
<td>Show help</td>
<td>F1</td>
</tr>
<tr>
<td><strong>General Windows Commands</strong></td>
<td></td>
</tr>
<tr>
<td>Close a menu or dialogue box</td>
<td>Esc</td>
</tr>
<tr>
<td>Cancel an operation</td>
<td>Esc</td>
</tr>
<tr>
<td>Exit OrgCharting</td>
<td>Alt + F4</td>
</tr>
</tbody>
</table>