OrgCharting V1.3
User Manual

CONTENT

Chapter 1 OrgCharting Introduction

OrgCharting is a powerful organizational chart maker with a user-friendly interface that allows users to create org charts with simply mouse clicking. It has abundant ready-made templates and advanced color themes to help you make professional 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 the company hierarchy and personnel relationship, so that company managers could gain insight for decision making and strategic planning. Besides, org charts can be used as the employee database, through which you can find, manage and update employee information. The views options of OrgCharting allow users to choose or define a special perspective and display the relevant information.

With OrgCharting, you can create highly-customized org charts, for example, with personalized color schemes, layout styles, backgrounds, or data fields. When you finish the chart, you can export your charts to different file formats such as PDF, JPG, Word, PPT, and it's easy for you to share the charts with others. You can also make awesome presentations by using the function of automatic slide deck generation.
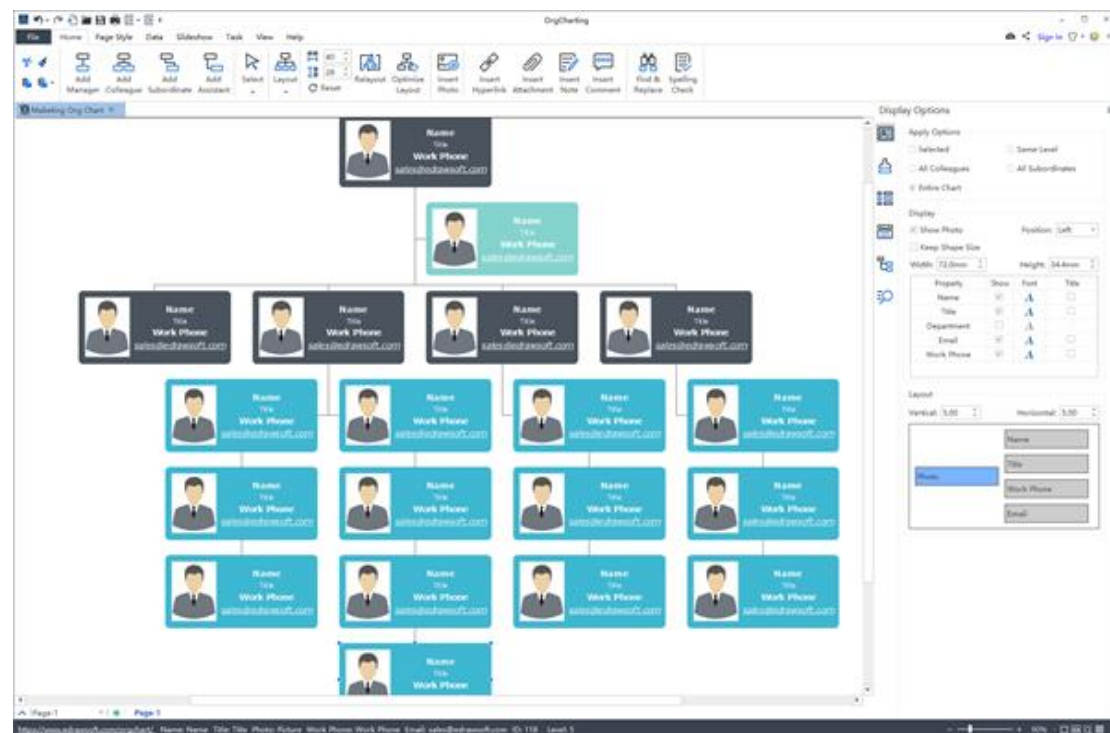
Chapter 2 Get Started with OrgCharting

User Installation

Download OrgCharting installation package from

https://www.edrawsoft.com/download-orgcharting.html

User Activation

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

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

User Deactivation

Deactivation is necessary if you wish to move OrgCharting from one computer to the other. Please note that deactivation can only be done once every 30 days.

The steps are:
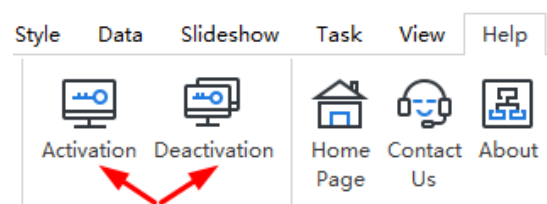
1. Simply go to the **Help** tab, and click **Deactivation**.
2. Once you have clicked **Deactivation**, OrgCharting on your current computer will turn to the unlicensed version, so you can activate it on another device.

Sign Up Cloud Account

You can sign up an OrgCharting cloud account and sign in to use the cloud and share your charts.
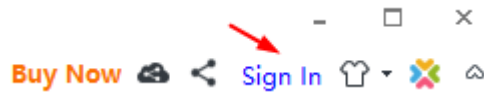
Check for Updates

You can download the latest version of OrgCharting from

https://www.edrawsoft.com/download-orgchart.php .

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 Toolbar**, **Ribbons**, **Right Sidebar** and **Status Bar** at the bottom.
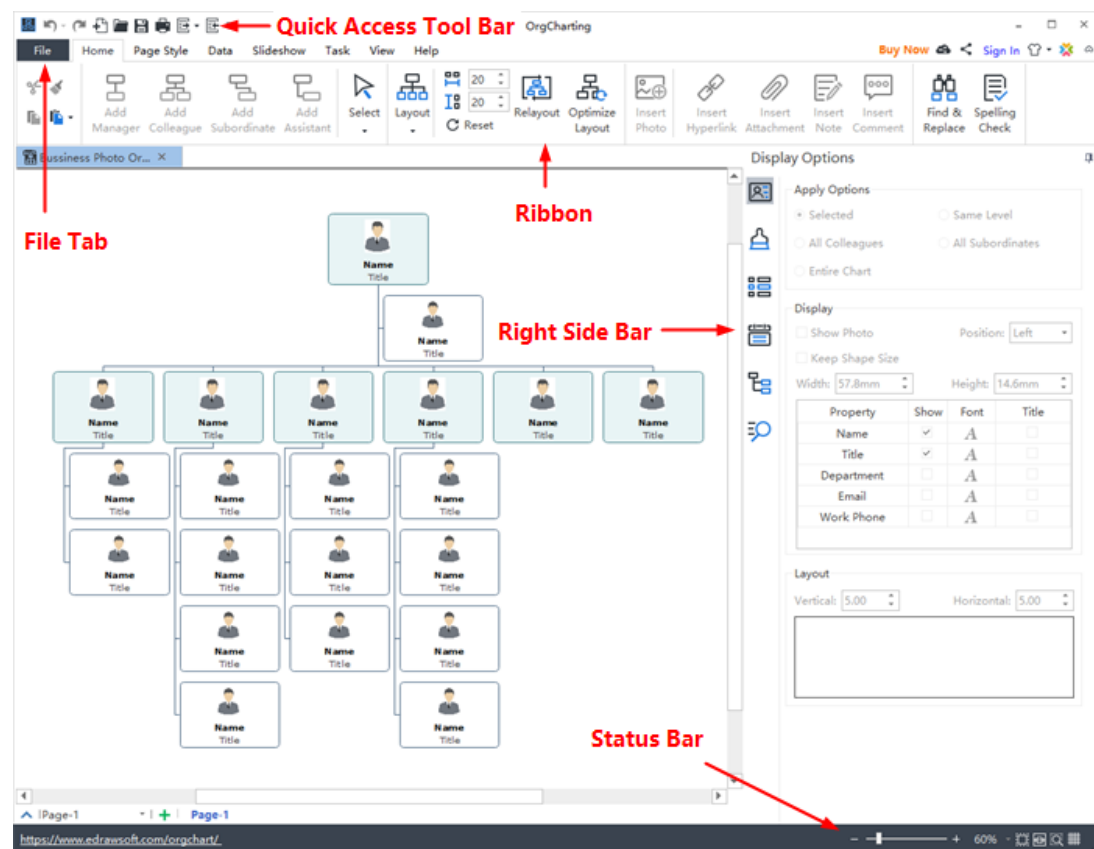
Quick Access Toolbar

In the quick access toolbar, you can find quick tools such as **Undo/Redo**, **Create a New Org Chart**, **Open Files**, **Save**, **Print, Export and Import**. 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 toolbar on the top or at the bottom of the Ribbon.


Ribbons

1. Home Tab

In the **Home** tab, there are plenty of helpful functions for creating org charts. You can add managers, colleagues, subordinates and assistants; change layout types; optimize layouts; insert photos, hyperlinks, attachments, notes and comments; adjust horizontal or vertical distances. -----
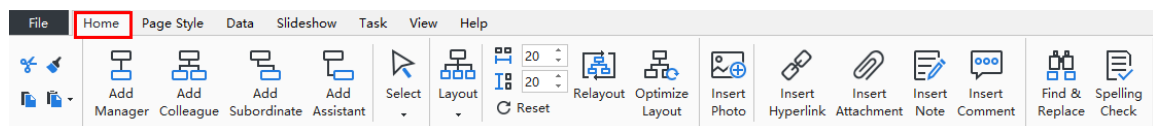
2. Page Style

The **Page Style** tab is where you can format your org charts. You can select the theme styles, theme fonts and theme colors. You can also edit or remove the background of your org charts, or customize your own watermarks.   -----
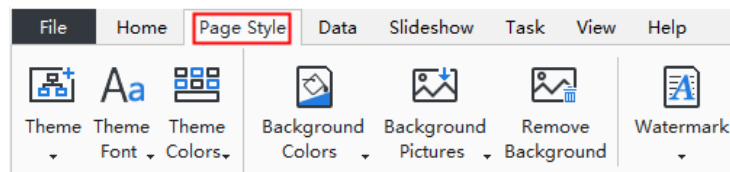
3. Data

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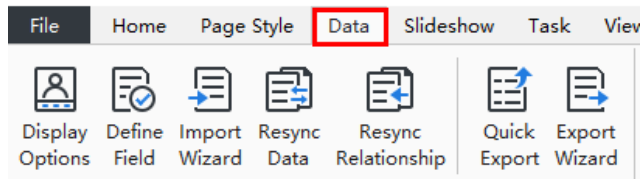
4. Slideshow

In the **Slideshow** tab, you can add slides one by one, or auto-create your slides. Feel free to edit or remove any content in your slide pages. Once finished, you can preview your work in full screen, and then export or print the PPT.
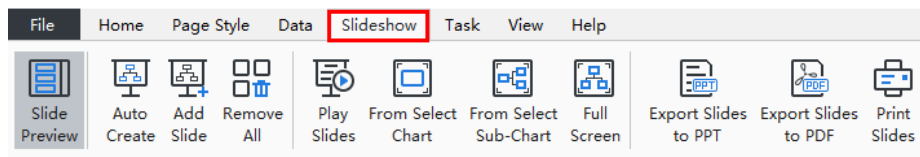

5. Task

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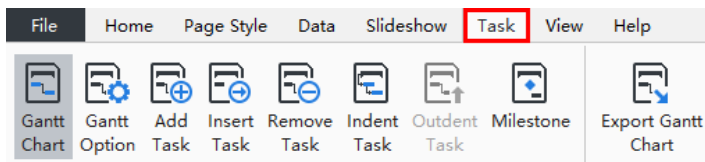
6. View

The **View** tab shows different view options. You can choose to zoom in or out your org charts or review it on the whole page. The **Tree** Panel allows you to edit data field content and it will synchronize with the org chart in the canvas.
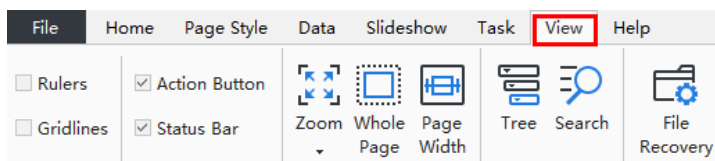
7. Help

In the **Help** tab, you can easily find tutorials, FAQ, contact information, keyboard shortcuts, and buttons to activate or deactivate the software.
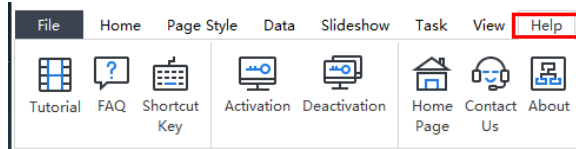

Right Sidebar

The Right Sidebar has 6 tabs in total: **Display Option**, **Style**, **Views Options**, **Data**, **Tree**, and **Search**.

1. Display Options

In the **Display Options** section, you can choose to show or hide your employees' photos, set the order, font, and position, etc. for displaying your employee details.

2. Style

In the **Style** section, you can change the background colors, background images, watermarks, theme styles, theme colors, and the overall text fonts.
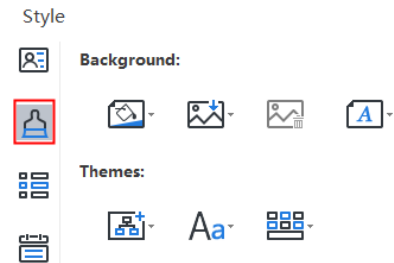
3. Views Options

The **Views Options** section provides different choices of viewing org charts. Some chart elements and data which are excluded from your choice are hidden in this mode. Usually, the company organizational charts contain massive information on different categories. However, a person at a specific position may not always want to see all the data. For example, if you are an HR, you can click HR Details to view the information about human resources only.
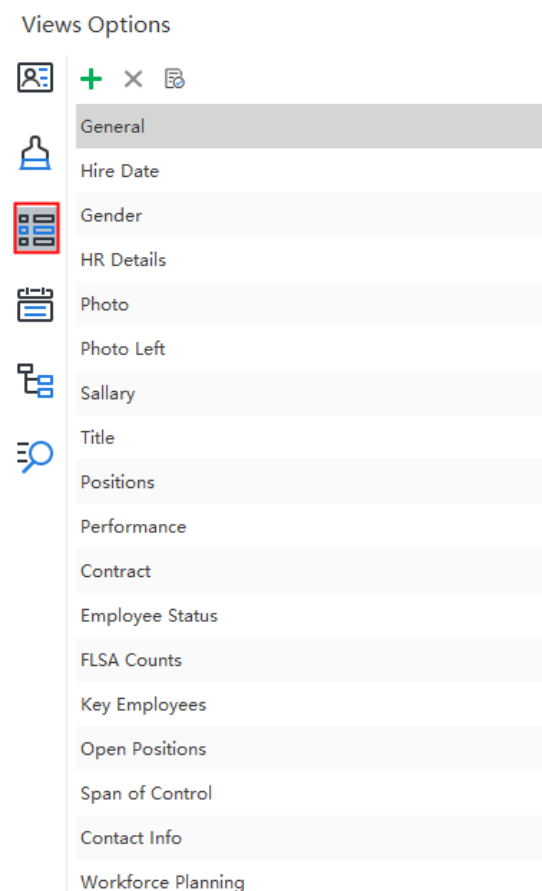
4. Data

In the **Data** section, you can see the full details of an individual employee in your current org chart, including the name, title, photo, department, contact information.

5. Tree

In the **Tree** section, you can quickly go through all the information in your current org chart. If you want to modify the information of certain employee, you can double click the name, title or photo to input the right details.

6. Search

In the **Search** section, you can search any specific employee information in your org charts, such as the name, title, location, gender, department, etc. Furthermore, you can also search for numbers like salaries, work performance ratios, etc.
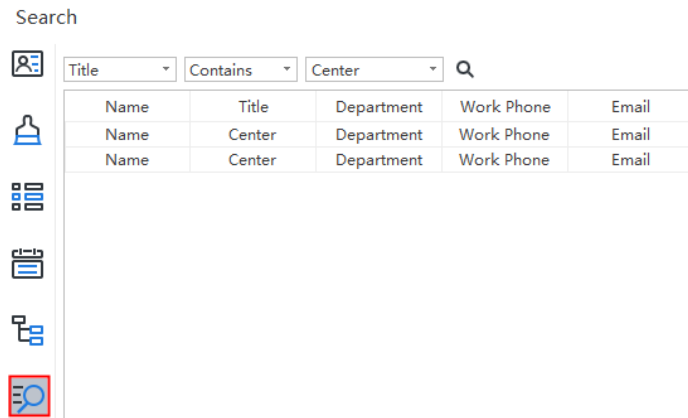
Start an Org Chart

You have 3 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.
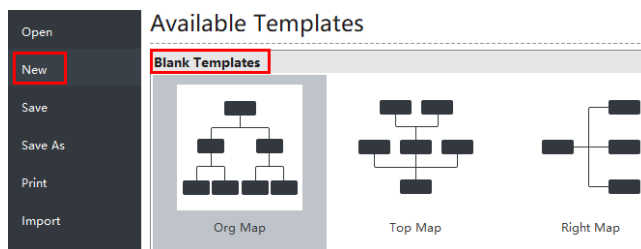
Option B: Double-click one of the org chart templates and examples in **File** > **New** > **Local Examples**. You can edit and personalize the selected org chart templates and examples.
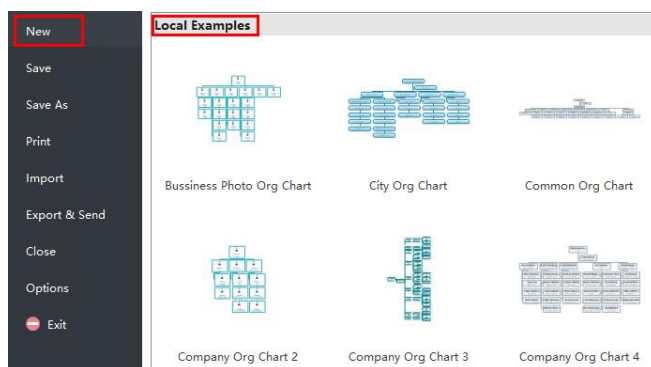
Option C: Left-click one of the org chart templates or examples in the **File** > **New** > **Local Examples**, and then click the Create button to start your org chart.
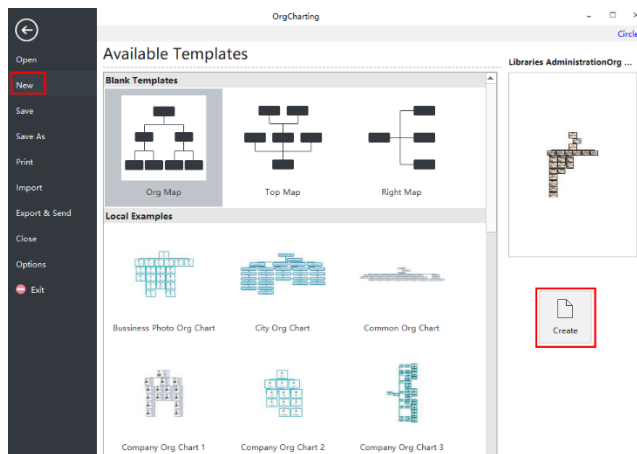
System Requirements

- Windows 2000, XP, Vista, Windows 7, Windows 8 and Windows 10

- Mac OS X 10 or later

- 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

To Add	Shortcut(s)
Manager Box	Shift + Enter
Colleague Box	Enter
Subordinate Box	Insert / Ctrl + Enter
Assistant Box	Alt + Enter

Add a Manager Box

(Shift + Enter)

You can add a manager box in 3 ways.

1. Press **Shift + Enter** on the keyboard.

2. Click the **Add Manager** button on the **Home** tab.

3. Move your mouse over 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 over a box, then click the floating button ⊕ .

Add an Assistant Box

If you want to add an assistant box, please use the 2 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.

Select Boxes

You can select boxes according to their types or levels. Click the **Select** button on the **Home** tab or right-click a box and go to the **Select** option to choose 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
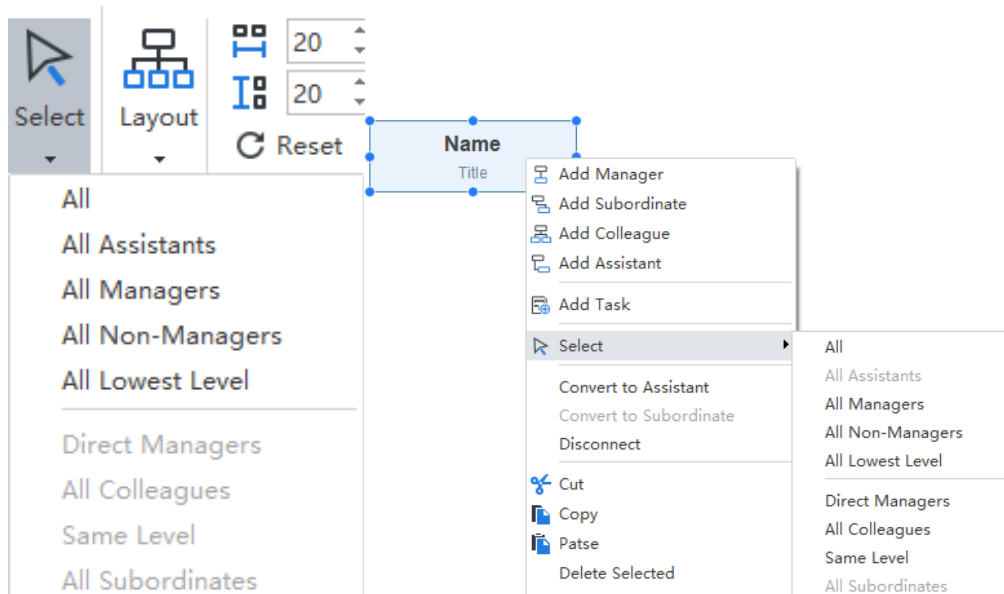
Move Boxes

You can move a targeted box to different directions, like 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 one) can be rearranged and moved into different positions.
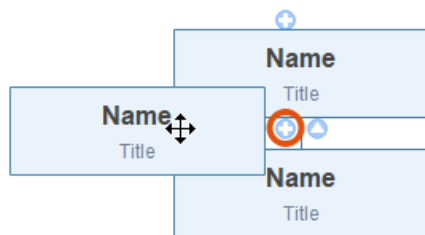
Delete Boxes

(Delete)

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 **Delete Selected** in the context menu.

3. The selected box, or boxes, will be deleted.

4. The remaining subordinate boxes will be raised to the higher level.
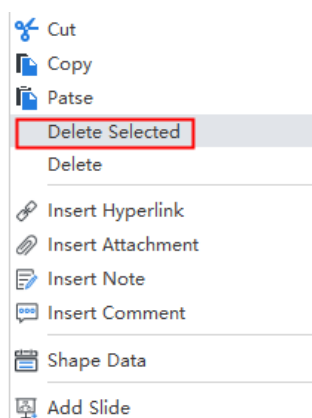
Delete a Selected Box and All of Its Subordinate Boxes

You can delete a box with all its subordinate boxes.

1. Select a box.

2. Right-click and then select the **Delete Branches**.

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 another.

Inserting Photos into 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.

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 of the box.

2. The default position of the photo is the left side of the box. You can change the position of the photo in the **Position** option which is on the **Display Options** panel.

Insert Attachments

OrgCharting allows users to insert attachments without quantity limitation. Attachments can be saved automatically in the org chart.

1. Select a box.

2. Click **Insert Attachment** on the **Home** tab or right click the topic and choose **Insert Attachment** option.

3. Click **Path** to select a file.

4. Change the name for the attachment if necessary.

5. Click **New** to add more attachments.

6. Click **Delete** to remove an attachment.
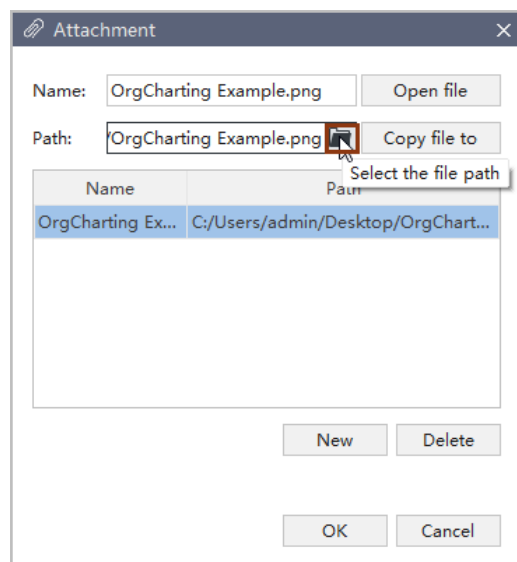
7. Change name for attachments if necessary.

8. Click **New** to add more attachments.

9. Click **Delete** to remove an attachment.

Tips:

The **Attachment** icon is on the top right corner of the topic. Hover the mouse cursor on the icon, you can see the name of the attachment and click the attachment name to open it.
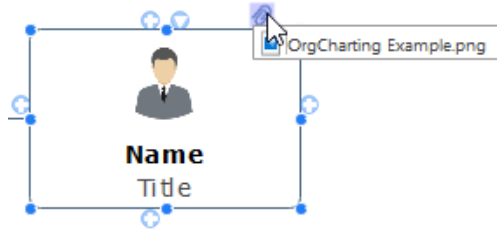
Insert Hyperlinks

(Ctrl + K)

Hyperlinks are convenient for users to view other documents, files or websites in org charts, including current documents, files, applications, internet addresses, and folders. 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.
3. Select **Current Document**.
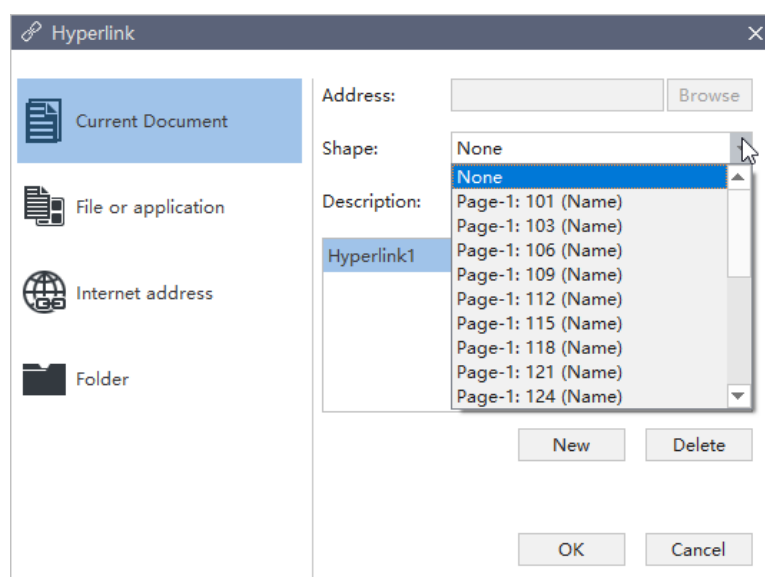
4. To link to a specific shape, you can choose a shape ID from the shape list.

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 a File or Application

1. Choose the **File** or **Application** in the Type list.

2. Click **Browse** and navigate to the file or application.

3. In the **Description** box, input a name for the link. This text will appear on the hyperlink icon.

4. Click **OK**.

Add a Hyperlink with a Folder

1. Choose the **Folder** in the Type list.

2. Click **Browse** and navigate to the folder.

3. In the **Description** box, input a name for the link. This text will appear on the hyperlink icon.

4. Click **OK**.

Change or Delete a Hyperlink

1. Select the box.

2. Click **Insert Hyperlink** or the hyperlink icon on the box.

3. To change a hyperlink, select the hyperlink in the hyperlink list, make changes to it, and then click OK.

4. To delete a hyperlink, select the hyperlink in the hyperlink list, click **Delete**.
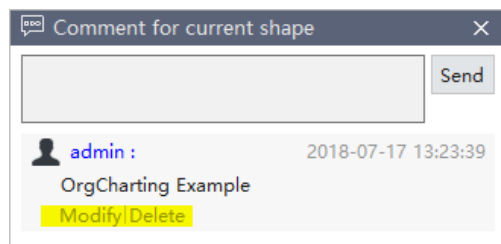
Tips:

The hyperlink icon is on the top right corner of the topics. If you move the pointer to the icon, you will see it.

Add Comments

Commenting on the specific topic or subtopic in a collaborative team is a highlight in OrgCharting. You can receive praises and suggestions from your colleagues and supervisor directly with the 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 the dialog box.
4. Click **Send**.
5. Click **Modify** in the bottom of the dialog box to edit the current comment.
6. Click **Delete** to remove a comment.

When a comment is added, there will be a green chatting icon showing on the top right corner of the box. If you move the 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

As org charts are always concise, many 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 the targeted boxes.

2. Click **Insert Note** on the **Home** tab, or right-click the box and select **Insert Note** option.

3. Type your note in the pop-up **Note** window.

4. Click **Picture** icon to add pictures.

5. Click **Calendar icon** to insert date.
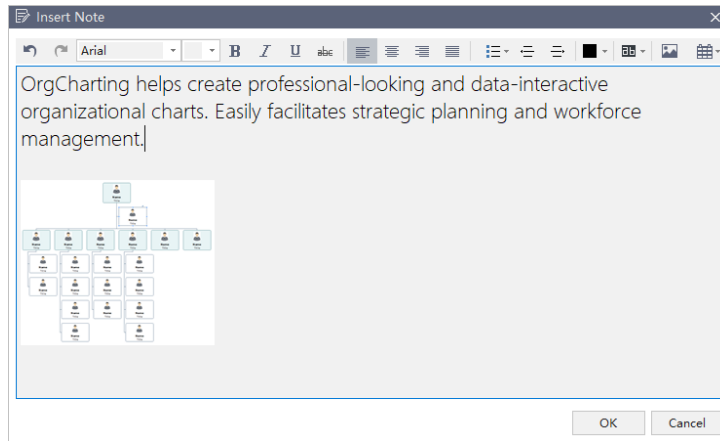
6. Edit text formats with text formatting options on the toolbar.

7. To check your notes, hover the cursor over the **Note** icon.

Chapter 4 Org Chart Layout Options

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 arrangement and directions of the chart.

Change Overall Chart Layout

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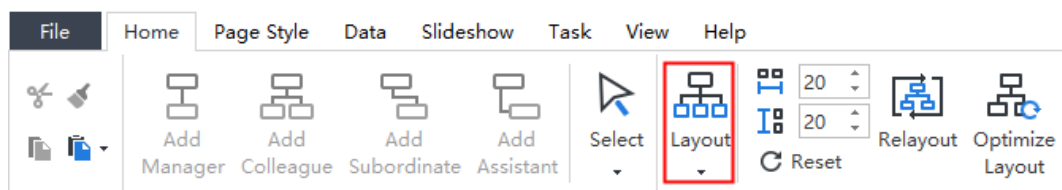
3. Select the layout style of the overall org chart.
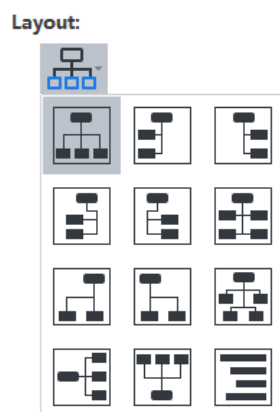
Optimize Layout

The **Optimize Layout** button in the **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 apply the adjustment to your chart.

3. Alternatively, you can input the number in the option boxes directly and press **Enter**.

Tips:

1. The maximum value is 200 for both horizontal and vertical distance, and the minimum is 20.

2. This function can only adjust the distance between all shapes on the whole.

Chapter 5 Theme and Style

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).
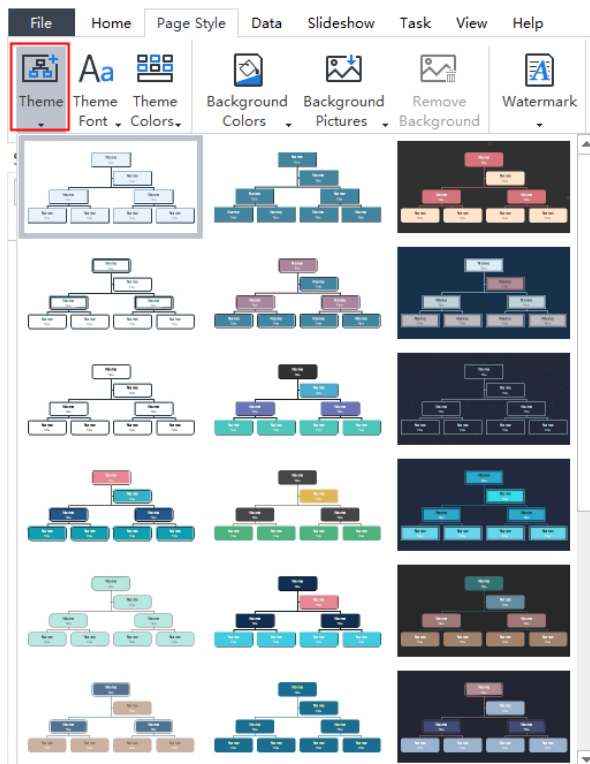
Click the **Theme** button in the **Page Style** tab of the ribbon or the **Style** option of the right side panel. Drag the scroll bar to choose your desired theme.
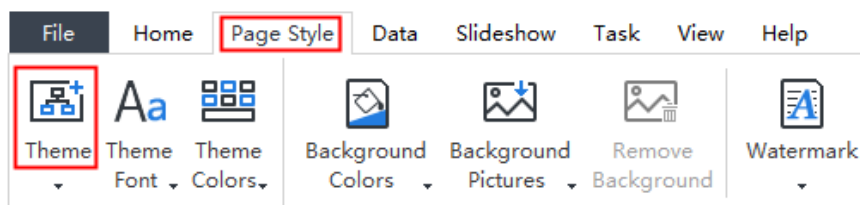
Change Theme Font and Theme Color

The default format for all the shapes and objects on the chart is determined by the theme of the chart. After selecting a theme, you can still change the theme font and theme color.

1. Click anywhere on the blank area.

2. Go to the **Theme** section under the **Style** panel on the Right Side Panel.

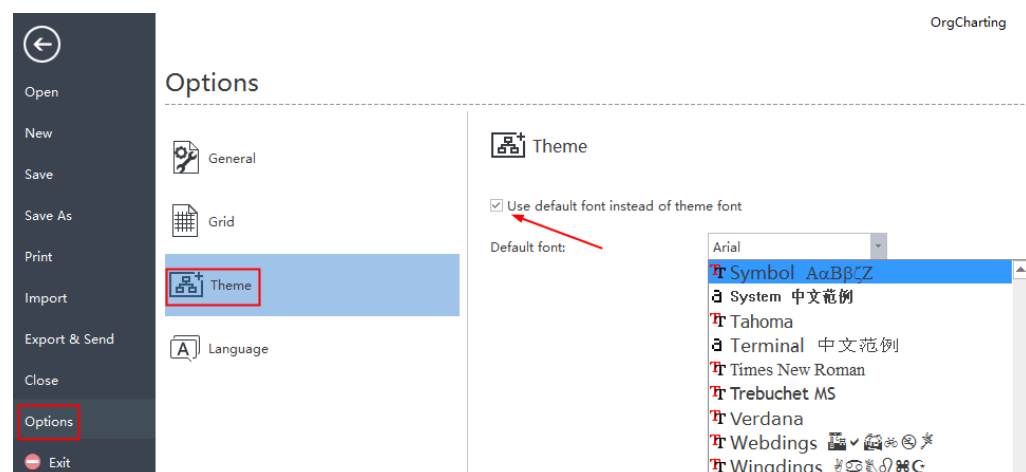3. Click the **Theme Font** and **Theme Color** buttons.

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.
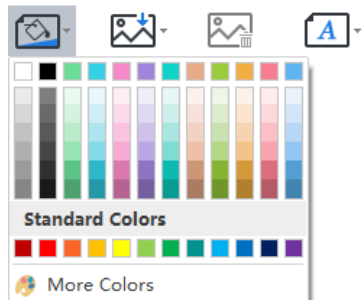

Background

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

Background Colors

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

Background Images

OrgCharting has a wide range of predefined background images to enhance the look of your org charts. You can add these premade background images or upload your own background images from local files.
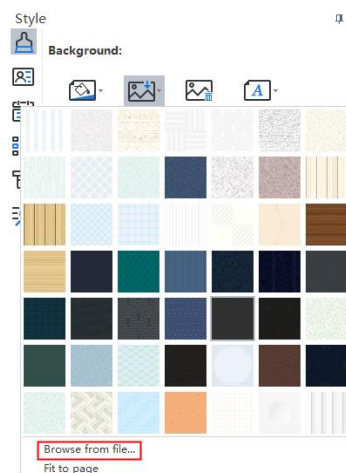
Add a Background from the Library

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.

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 in the **Page Style** tab or under the **Style** section on the right sidebar.

2. Choose a pre-made watermark from the thumbnails in the drop-down menu.

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.
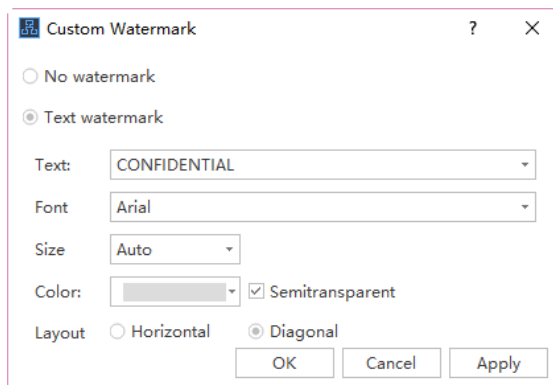
5. Click **Remove Watermark** when you don't need it.

Remove Background

To remove the background, click the button **Remove Background** .

Change Shape Fill Color

You can change the shape fill colors via 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.
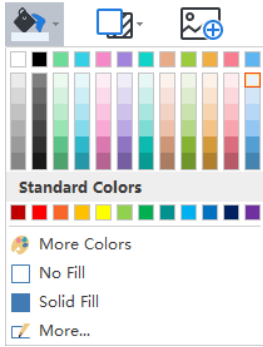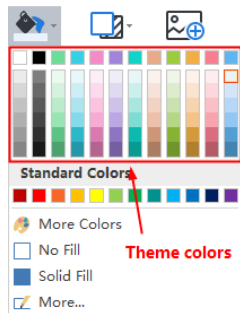
No Fill

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

Theme Colors
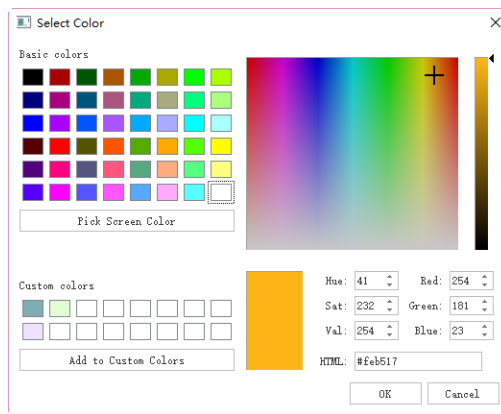
The top section of the Fill colors is **Theme Colors**. They are predefined color sets of the current themes.

More Colors

To use colors that aren't included in the theme colors or standard colors, click **More Colors**. In 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 option box 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).
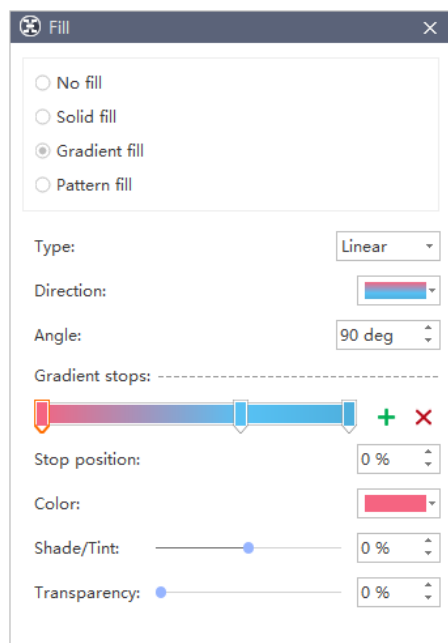
Gradient Type

To specify the direction when drawing the 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 in the Type option.

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 non-linear gradient.

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 option box below the slider.
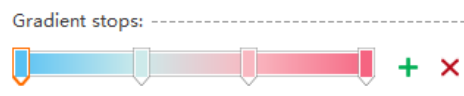

Color

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

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.
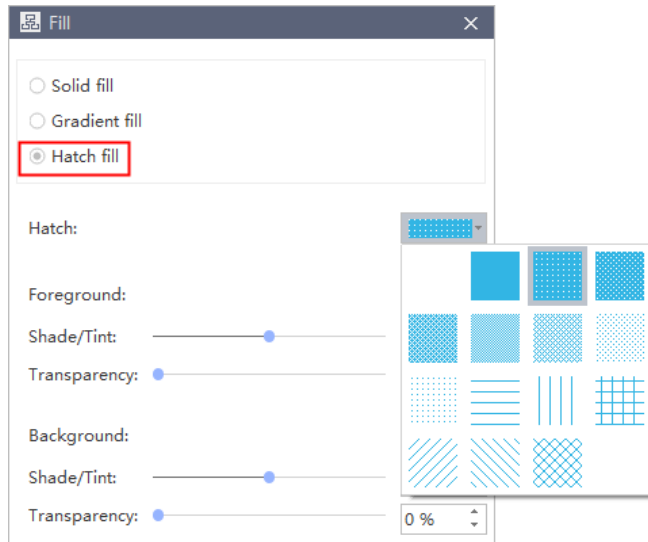
Change Shape Shadow

Click the **Shadow** button on the **Shape** panel, and then choose your preferred built-in shadow effect. If you cannot find your preferred one above, click **More···** to create customized shadows. This function lets you set customized shadow colors, effects, or offsets.

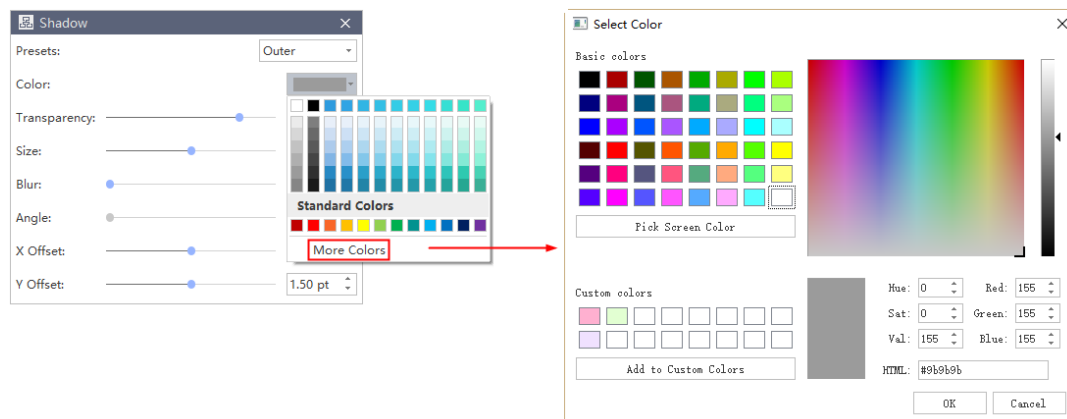

If you cannot find your preferred ones above, click "**More…**" to create customized shadow. This function lets you set customized shadow color, effect, or offset.
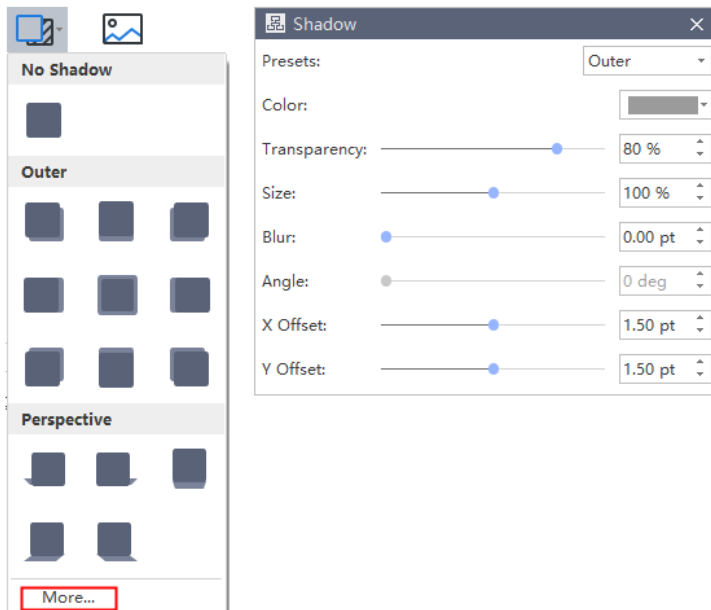
Shadow Color

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 the shadow, please move the **Transparency** slider or enter a number in the box 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 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 Offset** options together, you can place the shadow anywhere relative to the shape.

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** panel, in the **Border** group, you can change the border color, border round, border style, and dash type.

- To change the border color, click the **Border Color** button , and then choose your preferred border color.

- To change the border corner roundness, click the **Line Round** button , and then click your preferred border round.

- To change the border style, click the **Border style** button , and then choose your preferred border style.

- To change the border dash style, click the **Border Dashes** button , and then click your preferred dash style.

Tips: You can also change the branch line colors, branch line weight and branch dashes for your org chart.

Change Font

1. Select a shape or multiple shapes.

2. On the **Style** panel, in the **Font** group, you can change the font type, font size, alignment, bullet points, boldness, italic, underline, line spacing, or font color.

Font:

| Tahoma | ▾ | 14 | ▾ | A˄ A˅ |

| **B** | *I* | U̲ | a̶b̶c̶ | ☰▾ | ab▾ | **A**▾ | ▤ |

Click the following buttons to achieve corresponding font effects:

- **B** Bold the selected text.

- *I* Italicize the selected text.

- U̲ Underline the selected text.

- a̶b̶c̶ Draw a line through the middle of the selected text.

- ☰▾ Align selected text to a special edge.

- ab▾ Highlight the selected text.

- **A**▾ Change the text color.

- ▤ More font options.

Chapter 6 Data

Views Options

The **Views Options** provide a lot of choices to display your data. The individual chart elements and data excluded from your choice are hidden in this mode.

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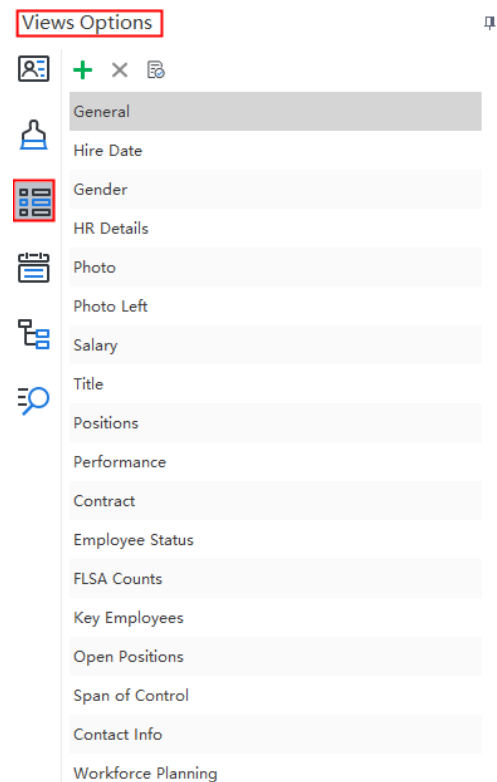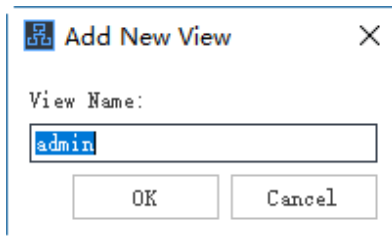

Add New View

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

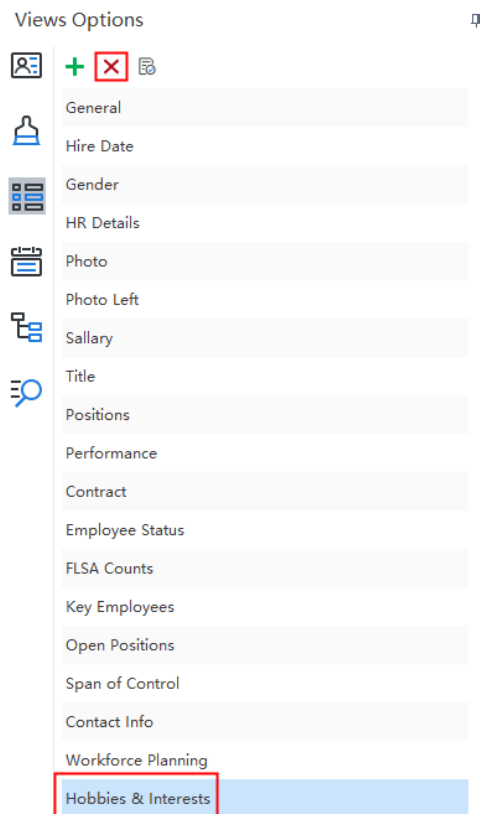Follow the steps below to add a new view:

1. Go to **Views Options** on the right sidebar, click the **Add New View** button ➕.

2. Edit the name of the new view and click **OK**. Here I name it "Hobbies & Interests".

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

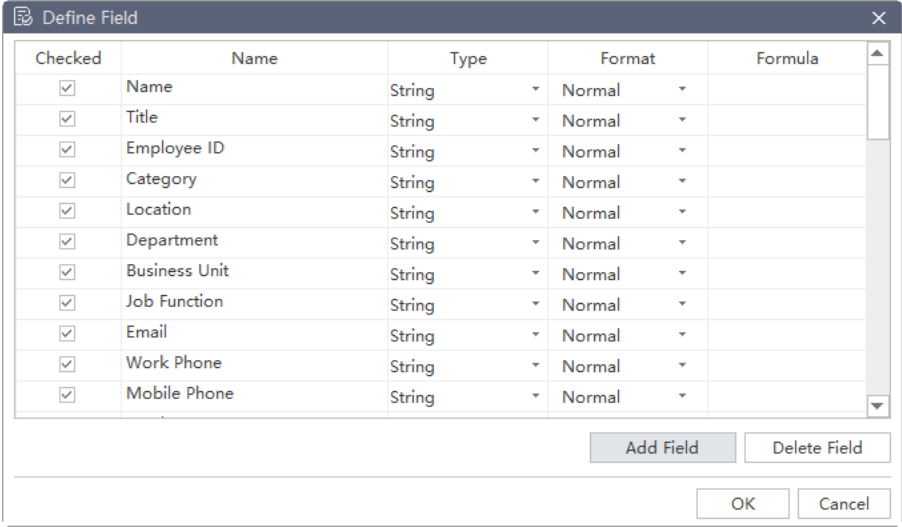If you need to delete the customized view, select the view and click the **Delete Selected View** button ✕.

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 with the predefined ones, and can be added to your chart or the custom view anytime.

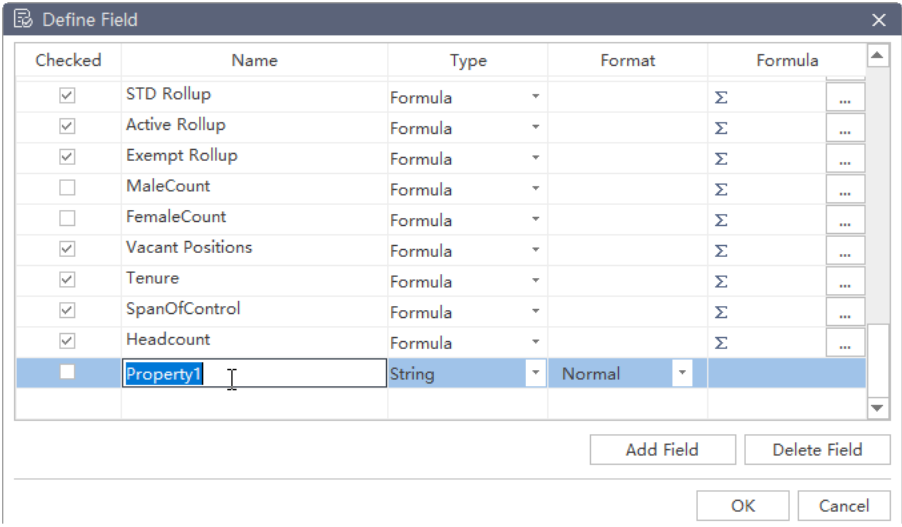The steps below will tell you how to add customized field to the org chart:

1. Go to the **Views Options** on the right sidebar, click the **Define Field** button 📇. The Define Field window will pop 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 menus.
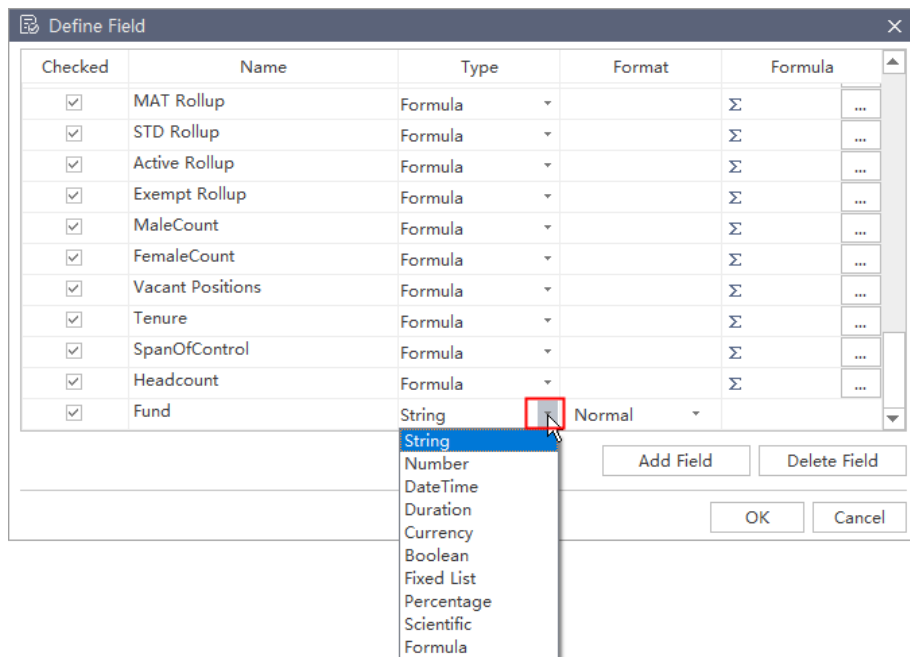
After you have checked the newly added field, you can choose to display it in the **Display Options** or not.
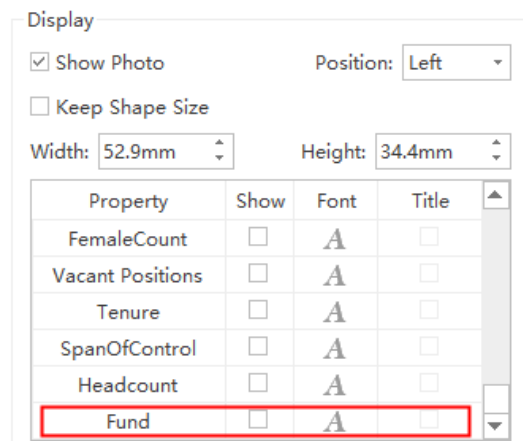
Display Options

The **Display Options** panel allows you to choose which kind of data will be displayed in the current view. It also lets you set the width, height, photo position, content layout, 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** panel allows you to quickly set the ranges and locations of the changes in your chart. With a single mouse click, you can affect everything from the data in the individual box to the look of selected boxes, same level boxes, all colleague boxes, all subordinate boxes, and even the entire chart.

Display

The **Display** menu determines the visual appearance of the data in a box. You can check or uncheck the **Show** box on the right of each property to make the data visible or not.

Layout

The **Layout** option determines the layout and alignment of the 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.

Vertical: 5.00   Horizontal: 5.00

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.
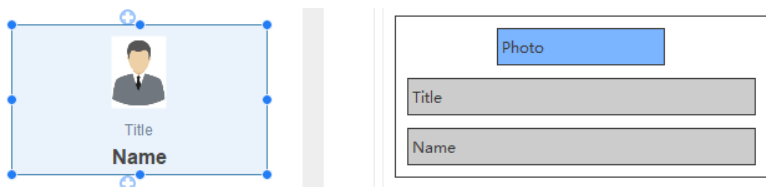
2. Drag the bar in the **Layout** window to re-align the data elements in the box. The red line reminds you where you can drop the bar.

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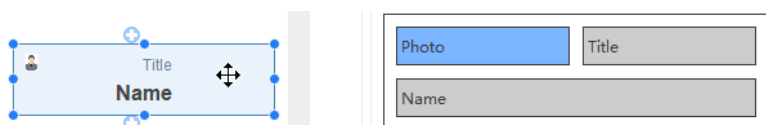
Tips:

In OrgCharting, you can add a separation line between two adjacent content sections.

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

2. Click the black line, and a border line will appear in the box accordingly.

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 2 ways to change a box size.

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

2. Select a box and go to the right sidebar, then click the **Data** button . The menu displays the shape data and hidden data as in the example below.

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.

Display and Edit Data of a Box

1. Select a box and go to Right Side Bar, then click **Data** button [icon]. 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.

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 formats (such as Excel) and convert them into 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**.
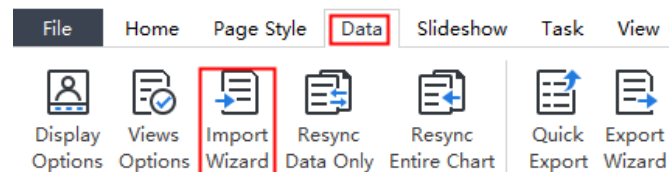
Tips:
    1. The data you intend to import must have correct reporting relationships.
2. You can move back and forth in the wizard to change your choices before you submit the final import.

Select Sources

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

1. This step is to choose which file to import (see below).
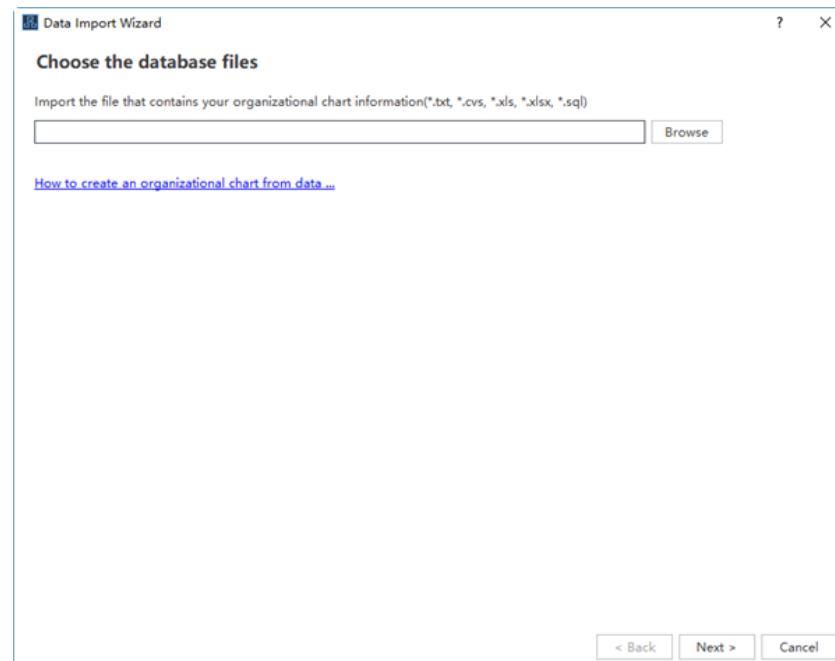
When you choose the file to import, there will be the following options:
- Click the **Browse** button. The **Open** menu will appear.
- **Next** - proceed to the next **Import Wizard** screen.
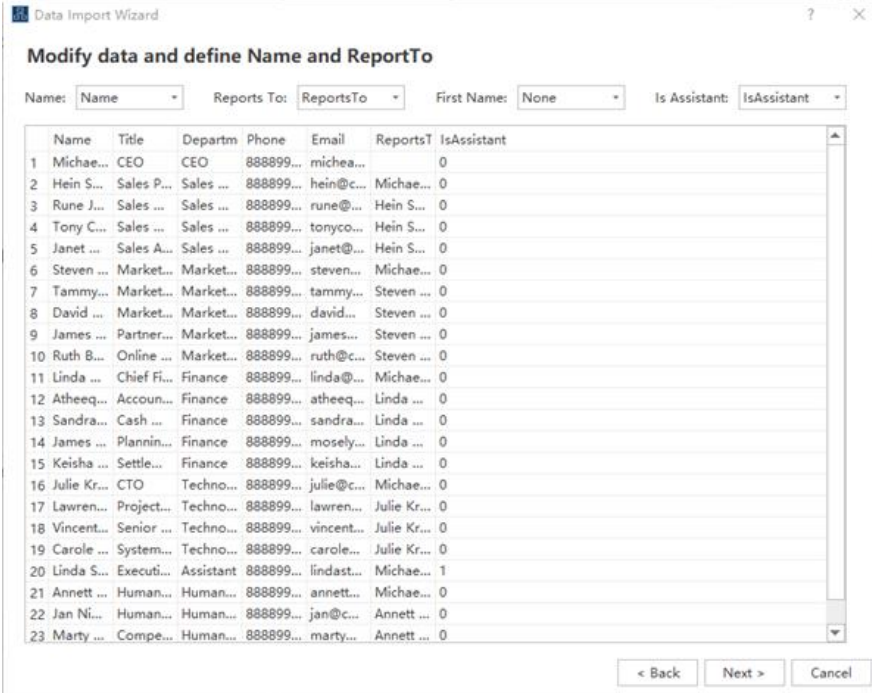
- **Cancel -** close the **Import Wizard** without saving and return to the main work area.
- Get help from "How to create an organizational chart from data...".

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

The **Display on shape** option determines which data fields 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.
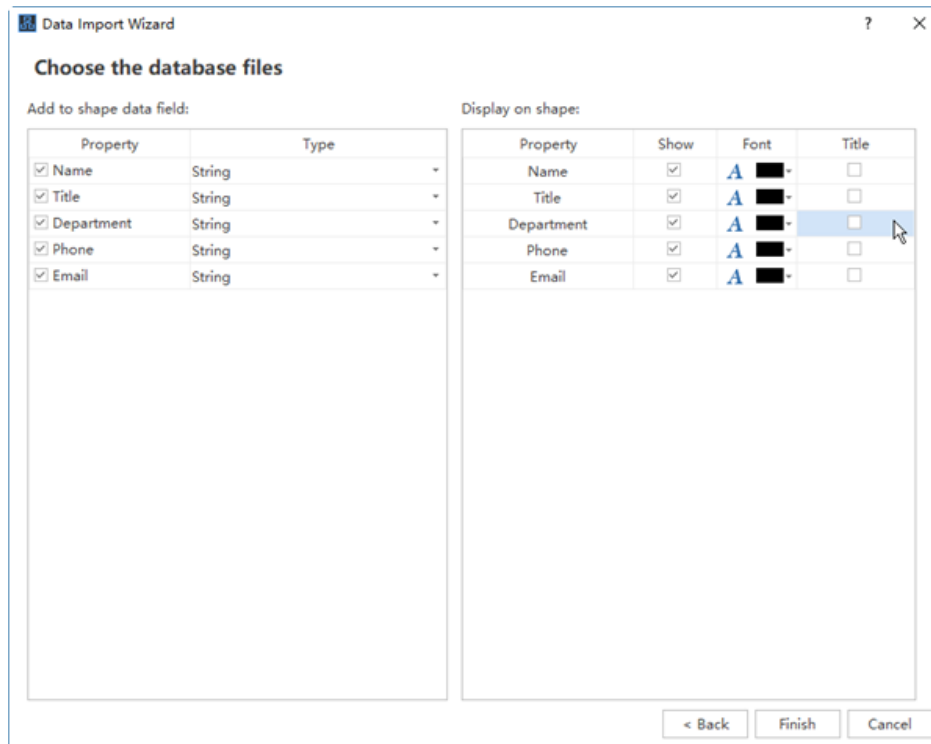
4. Click **Finish** to complete the wizard and return to the main work area.

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 which contains your latest information. To enable **Data Synchronization** function, the information must be imported from an external database file firstly.

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

Resync Data Only

(Shift + R)
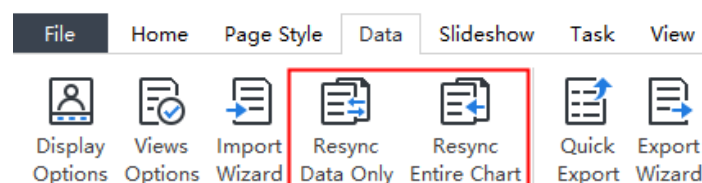
This option only synchronizes data on boxes. It won't change the relationship between the boxes and add or delete shapes.

Resync Entire Chart

(Ctrl + Shift + R)

This option can get the whole chart rebuilt according to the updated data source, including the data and the relationships.

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, you can add them to the "**Fields to export**" box on the right of the window and click **Export** to save them in a storage location.

Chapter 7 Slideshow

In the **Slideshow** tab, you can create and manage a set of slides for a chart. This can help viewers focus on the specific part of your chart or present the whole chart with different branches.

Once you have created slides, you can display, print, or export these slides to Microsoft PowerPoint.

Create Slides from Chart Automatically

OrgCharting lets you create a set of slides based on the chart branches. All slides can be automatically generated from your chart branches.

1. Go to the **Slideshow** tab and click the **Auto Create** button ⬚.

2. When the slides are created, you can see the thumbnails of the auto-created slides on the **Slide Preview** panel. The first slide is the top management and the rest of the slides are the branches at lower levels.
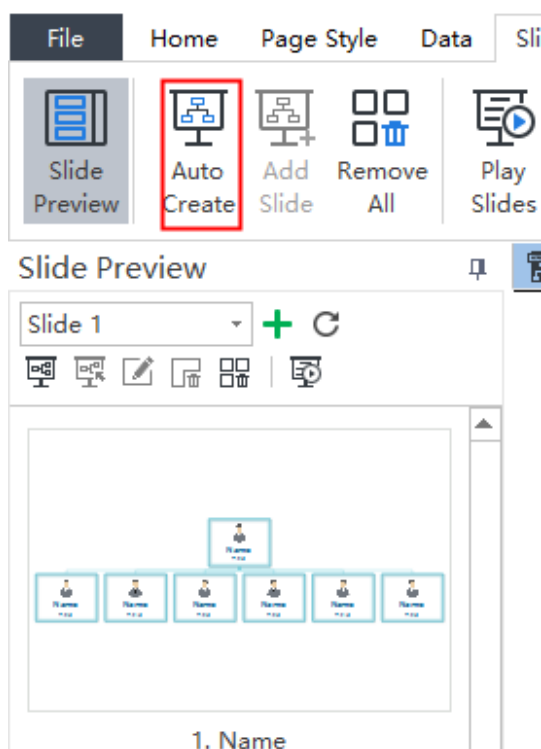
Create Slides Manually

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**.
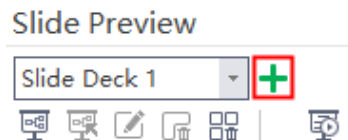
2. A pop-up window will show to let you name the new slide deck.
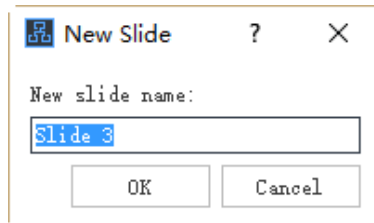
3. Type the name of your **New Slide Deck** and click **OK.**
4. A new slide deck is created.

Add Slide Pages

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

1. In the **Slide Preview** panel, select the **Slide Deck** you need to add pages.
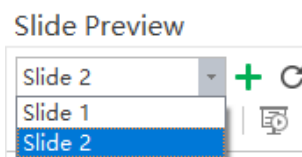
2. Go to your chart, select a branch or shape, and click the **Add Slide** button on the **Slideshow** tab.
3. The branch or shape will be added as a slide page. You can see it at the bottom of the Slide Preview panel.

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 the 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 thumbnail of the slide page in the Slide Preview panel, and you can preview the full slide page in the main window. Click the close button on the top of the main window, and you can close the full slide page.
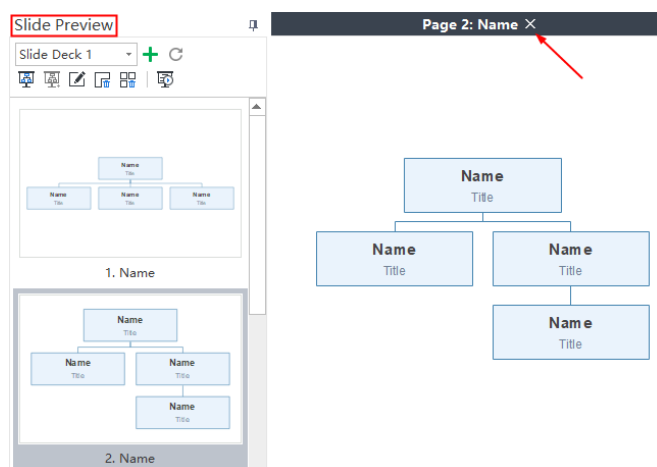
Reorder Slide Pages

Right-click on a slide preview thumbnail, and click **Move Up** or **Move Down**.
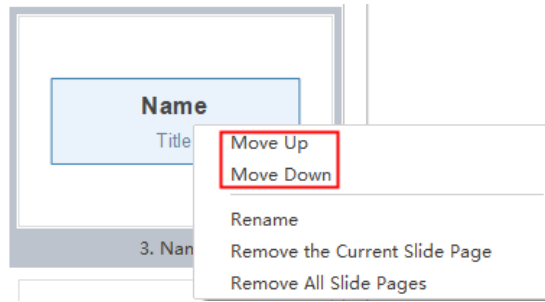
Delete Slide Pages

To delete a slide page, you can:

1. Select the slide page in Slide Preview panel and click the **Remove Current** button .

2. Right click the slide in the **Slide Preview** panel and click **Delete the Current Slide 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 in the Slide Preview panel.

2. Right click the slide in the Slide Preview panel and click **Delete All Slide Page** in the context menu.

3. Click **Delete the Current Slide Deck** in the context menu.

Traverse Boxes or Branches

(F5, Shift + F5)

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

1. You can click the **Present by Boxes** or **Present by Branches** option.
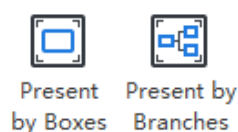
2. You can also click the **Full Screen** icon on **Slideshow** tab to view your document in full screen mode.

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 Slides

There are 3 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 on the lower part of the canvas, a toolbar with seven buttons will appear. Click the up and down arrow buttons to navigate your slides.

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

You can end the slide show by pressing the **Esc** key on your keyboard, or click the **Close** button ![X icon] on the slide show toolbar.

Export Slides to Microsoft Power Point

You can export the slide show to Microsoft PowerPoint format. Simply click **Export Slides to PPT** button ![PPT icon] .

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

Print Slides

1. Click the **Print Slides** button ![printer icon] on the **Slideshow** tab, or on the **Quick Access Toolbar**, then you can see the print setting and preview interface.

2. Set your printing options and then click the **Print** button.
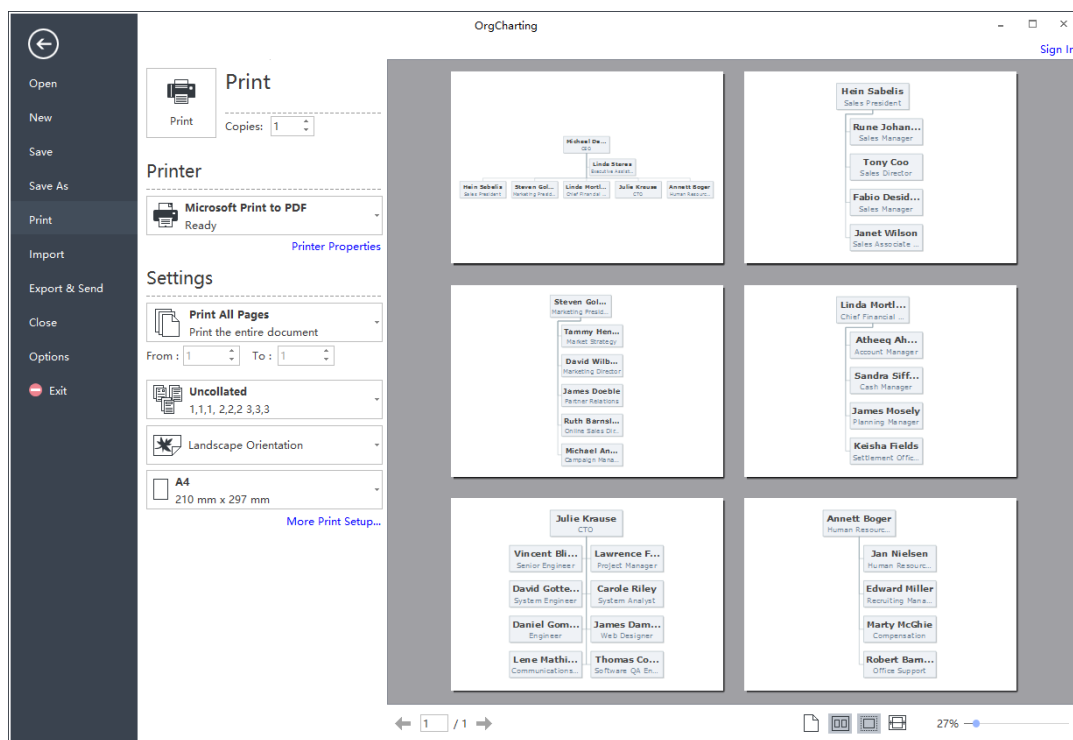
Chapter 8 Tasks

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.

1. Click the **Task** tab on the Ribbon.
2. Click the **Gant Chart** button to create a Gantt Chart.

Set Gantt Chart Options

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

1. Click the **Gantt Option** button in the Task tab.
2. You can set the following options for your Gantt chart.

   a. Select a date format in the drop-down menu.

   b. Tick the workdays from Monday to Sunday.

   c. Select the **Major Unit** and the Minor Unit in the corresponding drop-down menu.

   d. Set the **Task Duration** in the corresponding drop-down menu.

   e. Set the **Start Date/Time** and the **Finish Date/Time** in the corresponding

   drop-down menu.

Modify Task Info in 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.
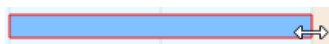
3. **Change Task Complete %**

   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.
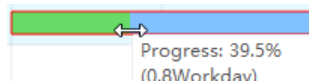
4. **Build a Task Dependency**

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

5. **Change the Date Unit**

   Click the "**+**" and "**-**" button on the top right corner to change the date unit.
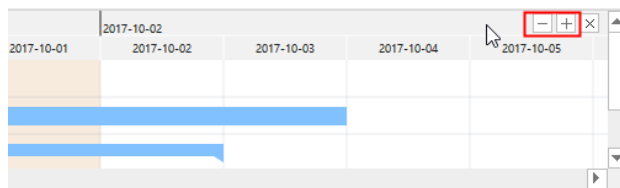
Set Milestone

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 & Replace option can help you check the specific word within the whole org chart, including employee names, titles, notes, comments, departments, salaries and so on.

1. Go to the **Home** tab and click the **Find & Replace** button. A pop-up dialogue will show up.

2. Type the content you intend to find in the find column, and click the **Find** icon

3. Type the content you intend to replace in the **Replace** column, and click the **Replace** icon .
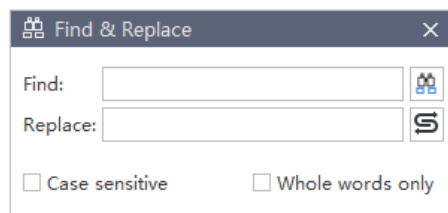
Tips:

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 the **Home** tab and click the **Spelling Check** button .

2. If there are mistakes in your file, the **Spelling Check** dialogue will show up with recommended spellings for you to choose.

3. Choose one of the listed recommendations 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 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.
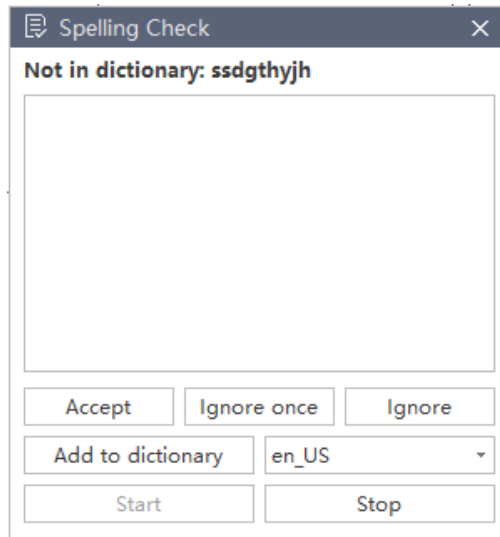
Tips:

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 another dictionary before the start.
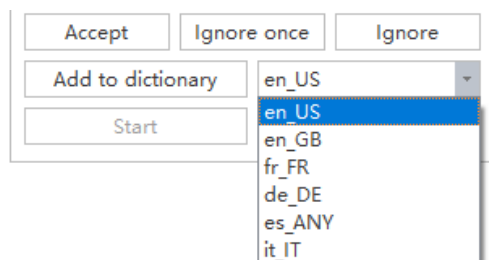
Undo and Redo

(Ctrl + Z / Ctrl + Y)

OrgCharting provides undo and redo actions for users.

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

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 **Computer**, **Personal Cloud**, or **Team Cloud**.
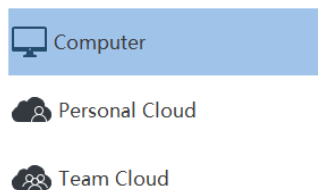
2. Drag an org chart and drop it on the top of the program.

Save an Org Chart

(Ctrl + S, Ctrl + Shift + S)

You can save your org chart via the **Save** or **Save As** options.

1. Go to the **File** menu, then click **Save** or **Save As**.

2. Enter a name and choose a storage location to save your file. The storage location can be the local disk, personal cloud, or team cloud.
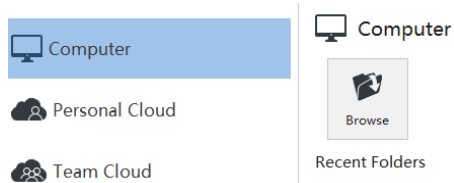
Find and Recover an Auto Saved File

OrgCharting creates an 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 autosave. The default setting is to save in every 10 minutes.

Set Auto-Save Time Period

1. Go to the **File** tab, click **Options**>**General**.

2. Input a time period in the **Save Auto Recover** option.

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.
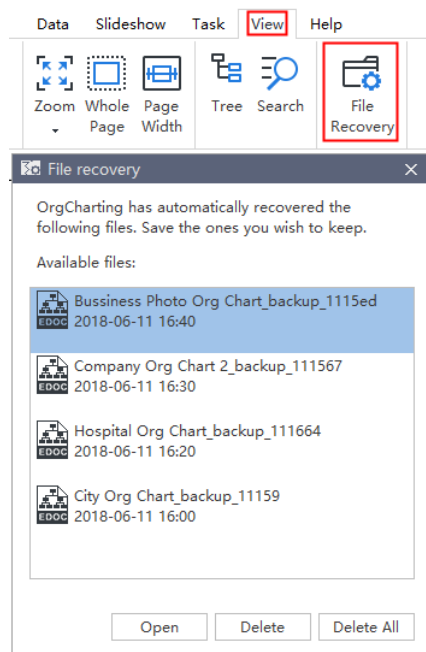
Print an Org Chart

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

Access Toolbar.

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.
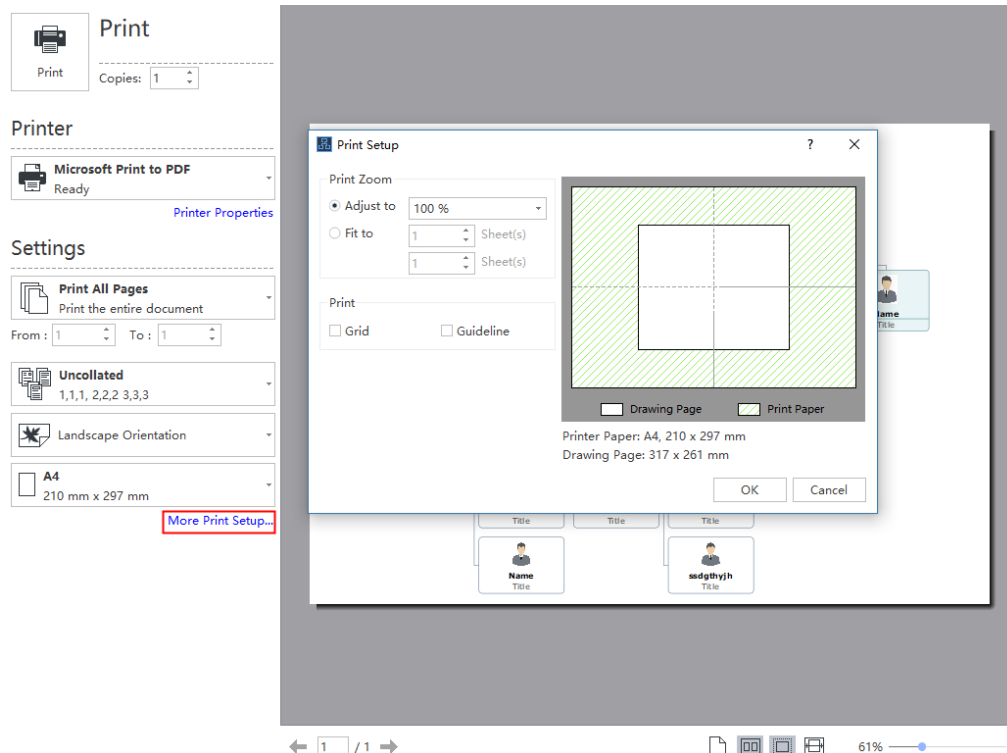
Adjust to

If the drawing page is larger than the size of the single printing paper, the diagram will be printed onto multiple pieces of paper. So you need to adjust the size of the drawing page to a specified proportion for printing.

Fit to

Fits each drawing in the print job on the length and width of the specified number of sheets. The drawing will be enlarged or reduced according to the number of pages and the margins you specified. If the length and width of pages are not proportional to the drawing's dimensions, only those sheets that are needed to maintain the drawing's proportion will be used.

Export an Org Chart

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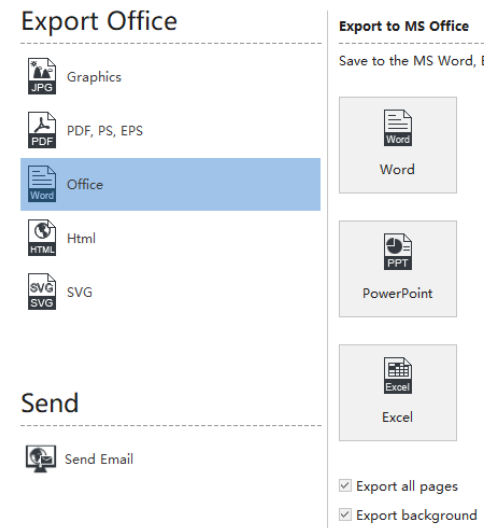
Export to Graphic Format

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 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.

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 the link with your colleagues and friends who have not installed OrgCharting, so they can view the org chart in anywhere and anytime.

Sign Up an OrgCharting Account

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

Buy Now Sign In

2. Click **Sign Up** to register an account.
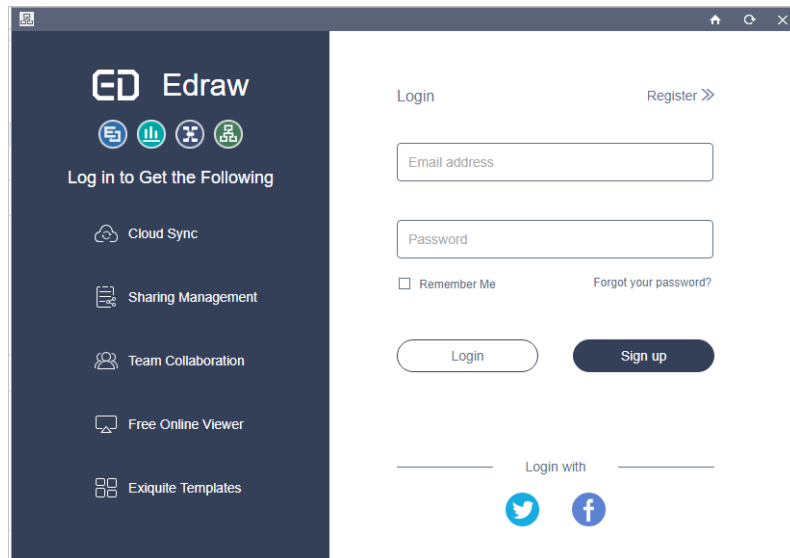
Share Your Org Chart

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** which synchronizes with the org chart in the work area.

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 the name and type to edit the content of **Data Field**. You can also move the box or add managers, subordinates, colleagues and assistants to the box in **Tree Outline View**.
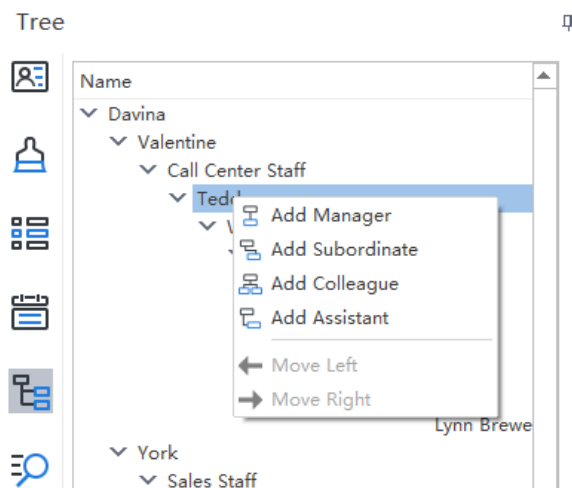
3. If you need to close the **Tree Outline View**, click the **Hide Panel** button on the top right of the panel.

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.
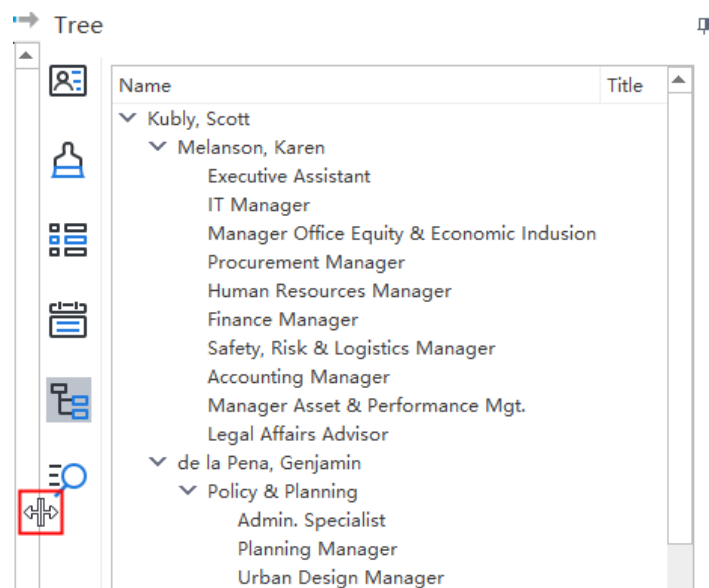
Rulers, Gridlines, Action Button and Status Bar

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.
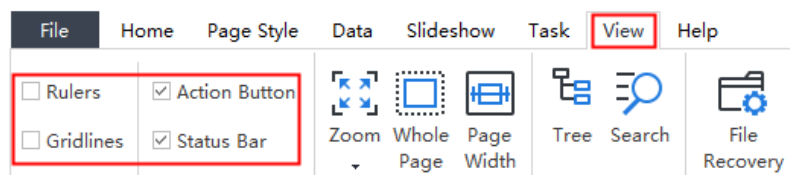
Rulers

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

Gridlines

The gridlines help users to position shapes more precisely.

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.
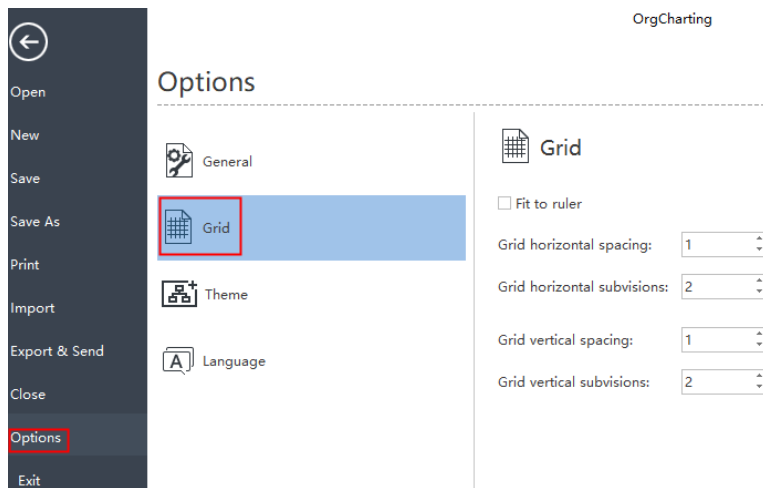
Action Button

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

The ⊕ is used to add managers, colleagues and subordinates.

The ⬆ ⬇ ▶ ◀ four buttons are used to collapse and expand the chart to different directions.
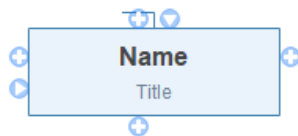
If you hide the **Action** Button, the box looks as the appearance below.
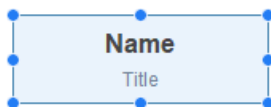
Status Bar

The **Status Bar** is a horizontal bar at the bottom of the window, showing the information about the program and the document being edited.
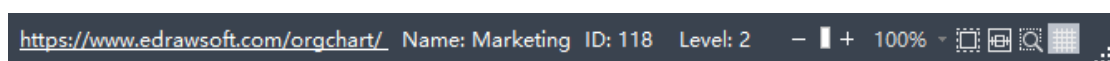
Collapse and Expand Boxes

You can collapse and expand branches of individual boxes interactively by using the ⊖ and ⊙ icons that appear around the boxes.

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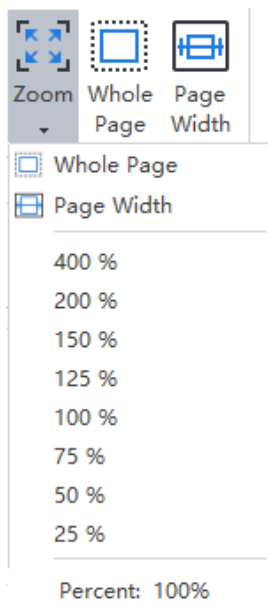
2. On the **Status Bar**, drag the Zoom slider.

3. Press Ctrl+ + for Zooming in. Press Ctrl+ - for Zooming out.

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, can be displayed on the screen.

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 finds auto-recovery files.
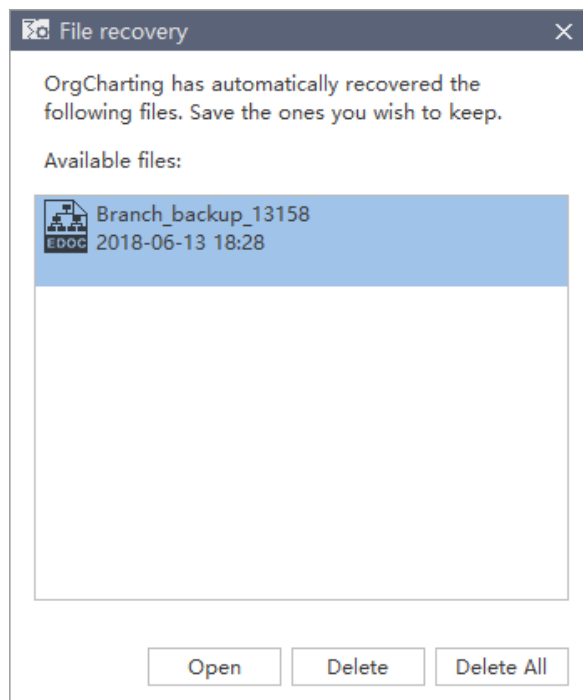
Chapter 12 Appendix

Keyboard Shortcuts

You can find the list of keyboard shortcuts any time on the ribbon's **Help** tab by clicking the **Shortcut Key** icon.
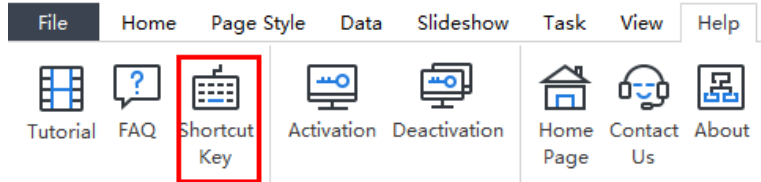
Function	Shortcuts
Documents	
Create a new chart	Ctrl + N
Open a chart	Ctrl + O
Save the current chart	Ctrl + S
Save all charts	Ctrl + Shift + S
Close current chart	Ctrl + W
Close all charts	Ctrl + Shift + W
Print the current chart	Ctrl + P
Navigating	
Select box (above, below, left and right)	Arrow keys
Select next box / previous box	Tab / Shift + Tab
Window	
Zoom in	Ctrl + + (plus)

Zoom out	Ctrl + - (minus)
Fit chart to screen	Ctrl + F5
Fit chart to 100% zoom	Ctrl + 0
Whole Page	F3
Page Width	Shift + F3
View	
Ruler	Ctrl + Shift + U
Gridlines	Ctrl + Shift + G
Status Bar	Shift + B
Action Button	Ctrl + Shift + A
Interface	
Show / Hide Display	F6
Show / Hide Views	F9
How / Hide Tree	F10
Show / Hide Data	F8
Show / Hide Search	Ctrl + Shift + F
Spelling check	F7
Find	Ctrl + F
Preview	F11
Slideshow	
Play slideshow	Ctrl + Shift + F5

Traverse boxes	F5
Traverse branches	Shift + F5
Full Screen	Ctrl + F5
Exit Full Screen Mode or Stop Slideshow	Esc
Adding Box	
Add first box	Enter
Add Subordinate	Insert / Ctrl + Enter
Add Colleague	Enter
Add Manager	Shift + Enter
Add Assistant	Alt + Enter
Adding Elements	
Add attachment	Ctrl + H
Insert picture	Ctrl + Shift + P
Add hyperlink	Ctrl + K
Add comment	Ctrl + Shift + T
Add note	Ctrl + T
Optimize Layout	Ctrl + Shift + O
Data	
Refresh data	Shift + R
Associate data	Ctrl + Shift + R
Define field	Ctrl + D

Quick export	Ctrl + Shift + Q
Import	Ctrl + Shift + I
Export wizard	Ctrl + Shift + E
Editing	
Undo the last action	Ctrl + Z / Alt + Backspace
Redo the last action	Ctrl + Y
Selecting	
Select all boxes and elements	Ctrl + A
Select all branches	Ctrl + Shift + B
Move boxs0	
Up one place	Chrl + Shift + Up Arrow
Down one place	Ctrl + Shift + Down Arrow
To top	Ctrl + Shift + Home
To bottom	Ctrl + Shift + End
Cut, Copy, Paste and Delete	
Cut	Ctrl + C
Copy to the clipboard	Ctrl + C / Ctrl + Insert
Format Painter	Ctrl + Shift + C
Paste	Ctrl + V
Selected Paste	Ctrl + Alt + V
Delete current object	Delete

Delete Current Branch	Shift + Delete

Box Text	
Edit box text	F2

Commands in Box Text Edit Mode	
Enter line break in box	Shift + Enter / Ctrl + Enter
Move to beginning of line	Home
Move to beginning of box text	Ctrl + Home
Move to beginning of box text	Ctrl + End
Cancel editing box	ESC
Find	Ctrl + F

Commands in Find Mode	
Find next	Enter
Spelling check	F7

Formatting	
Toggle to bold and back	Ctrl + B
Toggle to italics and back	Ctrl + I
Toggle to underline and back	Ctrl + U
Increase font size	Ctrl + Shift + >
Decrease font size	Ctrl + Shift + <
Edit text	F2
End Formatting	Esc

Layout	
Toggle up	Ctrl + Shift + F4
Toggle right	Ctrl + F4
Toggle down	F4
Toggle left	Shift + F4
Move to left	Ctrl + Left Arrow
Move to right	Ctrl + Right Arrow
Export	
Export to graphics	Ctrl + G
Using Help	
Show help	F1
General Windows Commands	
Close a menu or dialogue box	Esc
Cancel an operation	Esc
Exit OrgCharting	Alt + F4