OrgChart Now
Management Level Charts

OfficeWork Software LLC

Introduction

Many Org Chart Now customers have requested 'Management Level' charts. A 'management level' chart differs from a conventional org chart in that it visually groups employees in horizontal bands based on a management level. Management Level charts provide an additional level of insight into an org chart (for example, a management level chart makes it is easy to distinguish between Vice Presidents and Directors reporting to a CEO).

Although not required, we recommend you go through the *Getting Started Guide* before using this guide.

Step 1: Data Preparation

In this guide, we'll create a management level org chart from an Excel spreadsheet; however, almost all of the same principles apply if you plan on using a data connector.

First, you'll need to create a spreadsheet. See Required and Recommended fields below.

>> Data Format

Required fields:
- PersonID – Unique identifier for each person (typically an employee number or ID)
- SupervisorID – Unique identifier for each person's supervisor
- Name – Employee name
- Title – Employee title
- Mgmt_Level – Management Level for the employee

Recommended fields:
- IsAssistant – 0 or 1 (1 indicates the person is an assistant)
- Department – A person's department (e.g. Engineering or Marketing) [Not shown below]
- Photo – A reference or URL to an employee photo (e.g. a jpeg file) [See *Appendix B* in the *Getting Started Guide* for more details on photos]

You can any number of additional fields to your data file (for example, location, email address or mobile phone).

Example Data:

PersonID	SupervisorID	Name	Title	isAssistant	Photo	Mgmt_Level
1		Steve Smith	CEO	0	Smith1.jpg	1
2	1	Sandra Chen	VP	0	Chen2.jpg	2
3	1	George Lopez	VP	0	Lopez3.jpg	2
4	1	Arnold Osborne	Director	0	Osborne4.jpg	3
5	2	Jene North	Director	0	North5.jpg	3
6	4	Adam Johnson	Manager	0	Johnson6.jpg	4
7	3	Jacob Zu	Manager	0	Zu7.jpg	4

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The data above will generate the following management level chart:
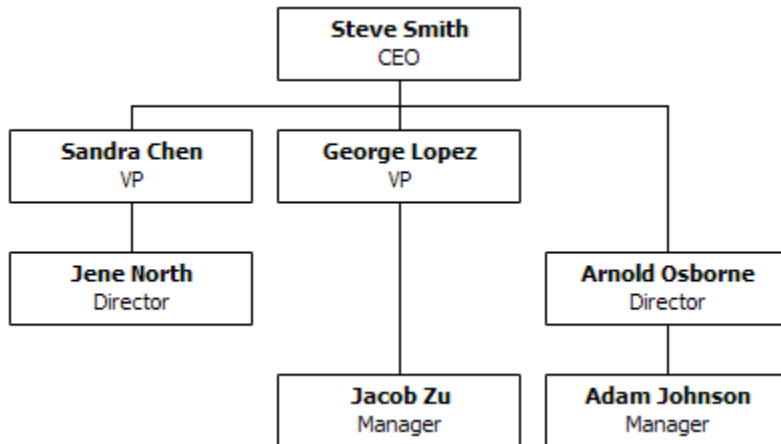
Step 2: Import Data

In this step, we'll use the Import Wizard to automatically create a management level chart.

>> Importing an Excel File

1. Login to OrgChart Now.
2. Upload your spreadsheet to your account (See **Appendix A** for more detail on uploading files)

3. Click on the 'Import Wizard' button (on the top tool bar).

4. Select the 'Excel' option. The Import Wizard Panel is displayed.
5. Click on the 'Import Data' data button
6. Select the file you just uploaded
7. Click on the green 'Select' button to load the data file (you can also double-click).

8. The 'Filter Data' step is shown. Click on the 'Next' button.
9. The 'Define Fields' step is shown. Click on the 'Next' button.

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Note: If you didn't use the same naming conventions as specified in the 'Data Preparation' step, you can map your fields to the required fields. For example, you can specify which field is to be used as the 'PersonID' field.

10. The 'Subchart Breaks' step is shown. Click on the 'Next' button. Select the 'Do not insert breaks' option (if it is grayed out, select the break by level option).
11. The 'Select Chart Template' step is shown. Select 'Classic' and then click on the 'Next' button. Chart Templates are discussed in more detail later in this document.
    Note: Select the template 'Photo-Left' if you included photo references in your data.
12. The 'Master Page' step is shown. Select the 'Blank master page' option and then click on the 'Create Chart' button. A standard org chart is created.

Step 2: Set the Level Chart Option

1. Click on the Data tab (at the top) and the select the 'Refresh Properties' button.
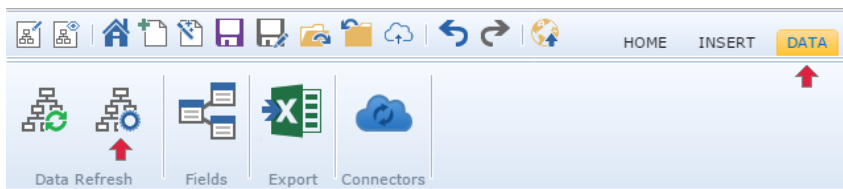
2. Select the 'Advanced Options' menu item. The 'Advanced Options' panel is shown.
3. Select the 'Create level chart' check box. Click OK.
4. Select the 'Refresh Data' button. The 'Data Refresh' Panel is shown.

5. Make sure the 'Smart Refresh' button is selected.
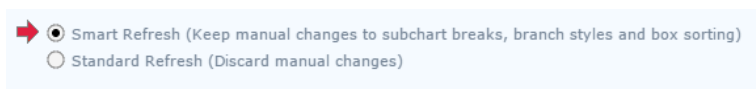
6. Click on the 'Refresh' button. Your chart will automatically be reformatted as a level chart.
7. Save your chart.

Step 3: Customizing your Chart

Based on your specific requirements, you may want to display more than just Name and Title in your chart boxes.

>> Using the Box Layout Editor

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The first step in creating a Custom Template is learning to use the Box Layout Editor. The Box Layout Editor allows you to define exactly how a box is formatted. In the example below, we'll add the 'Department Name' Field to a box in your chart.
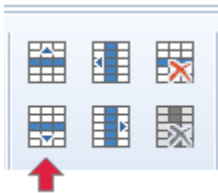
1. Select any box in your chart and then click on the Box Layout button. The Box Layout Editor is shown.
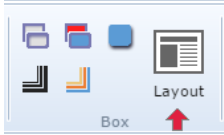

2. Select on 'Title' Field.

3. Click on the 'Insert Row Below' tool (in the top Ribbon). A blank row is added below the 'Title' field.

Note: To add a photo, select the <Name> field and then select 'Insert Row' above. Drag and drop the 'Photo' field into the empty cell above <Name>. Skip to step 8 when done adding the photo field.

4. Drag and drop the 'Department Name' field from the Field Picker (on the left) into the empty cell below 'Title.'
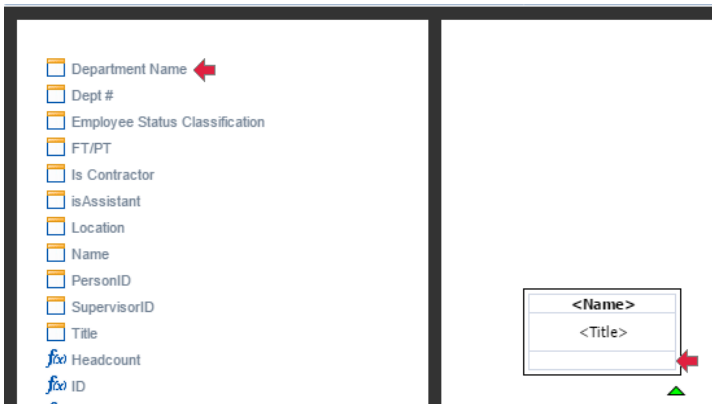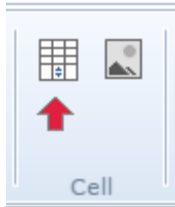

5. The result should look like this:
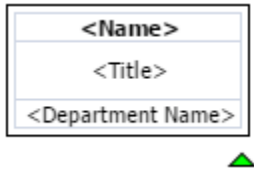
6. Select the 'Department Name' cell and then select the 'Expand Row' option. This tells the Box Layout Editor that that the 'Department Name' cell should use any remaining vertical space in the box (sometimes a box has more vertical space available than required by field contained in the box).
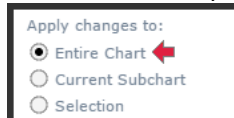
7. Select the 'Department Name' cell (if it isn't already selected) and then select the 'Bottom Align' option.
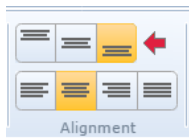
8. Select 'OK' (in the top ribbon). The selected box is now updated to show 'Department Name' at the bottom.

Note: In the box layout editor, you can choose how to apply a box layout.

>> Adding a Box Style

The next step in creating a Custom Template is learning how to create Box Styles. Box Styles allow you to save a specific box layout and then apply it to selected boxes or use it as part of a Custom Template. In the example below, we'll create a Box Style from the box layout that you created in the previous step.

1. Select the 'Box Styles' tab (in the lower right hand corner of the screen). The Box Styles Panel is shown.
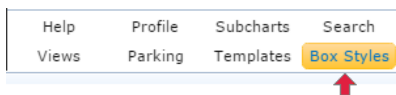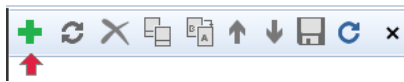
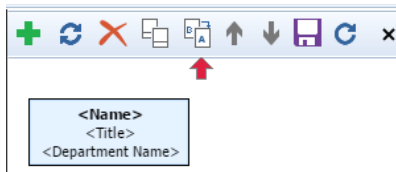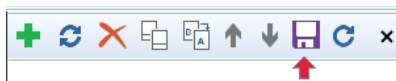2. Make sure the 'User Styles' radio button is selected.
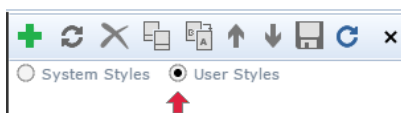
3. Select the box (where you just added the Department Name) and then click on the 'Add Box Style' button. A box style is added.

4. Click on the 'Rename Box Style' button and enter 'Name+Title+Department' and then click OK.

5. Click on the 'Save Styles' button. This will save the added box style so that you can use it on any chart.

>> Updating a Box Style

If you need to make changes to a box style (e.g. add an additional field), do the following:
1. Select the 'Box Styles' tab (in the lower right hand corner of the screen).
2. Select any box in your chart and then use the Box Layout Editor (or Box tools in the top ribbon) to modify.
3. Make sure the box style you want to update is selected (in the Box Styles tab). Also make sure the box (in the chart) that you just edited is selected.
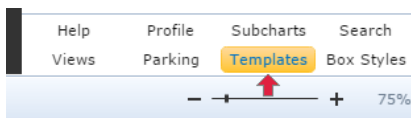4. Click on the 'Replace Box Style' button.

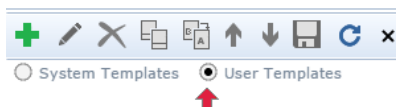5. Click on the 'Save Styles' button when done.

>> Creating a Custom Template

Now that you are familiar with box layouts and box styles, we can put it all together to create a Custom Template.

1. Select the 'Templates' tab (in the lower right hand corner of the screen). The Templates Panel is shown.
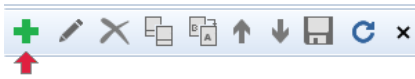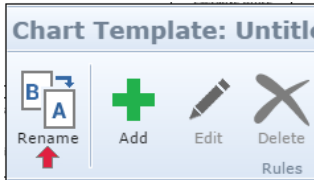

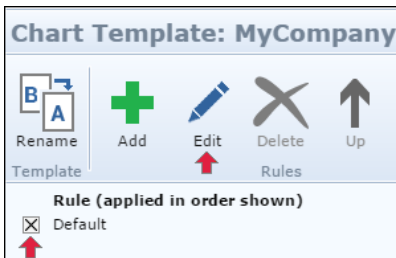2. Select the 'User Templates' radio button.

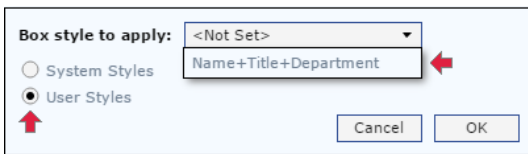3. Select the 'Add Chart Template' button. The 'Template Editor' is shown.

4. Select the 'Rename' button and then type 'MyCompany' and click OK.

5. Now select the checkbox to the left of 'Default' rule and then click on the 'Edit' button.

6. For the default rule, we'll apply the Box Style we created earlier. Select the User Styles radio button and the 'Name+Title+Department' box style. Click OK when done.

7. Click on the 'Save Chart Templates' button to make sure your template is saved.

Note: To edit a chart template. Select the template in the Templates Panel and then click on the 'Edit Chart Template' button.

Note: More information on Chart Templates can be found in the *Getting Started Guide*.

Step 4: Creating a Master Page Template

The Master Page contains elements that are included on every page of a chart. Typically, elements such as a corporate logo and page numbers are placed on the master page so that a chart is easy to understand when printed or published to PDF. See the *Getting Started Guide* for more details on creating a master page template.

Step 5: Data Refresh

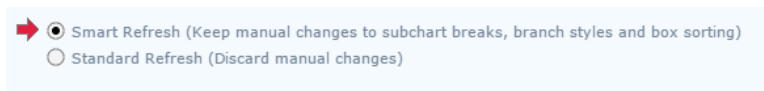OrgChart Now can automatically update a management level chart.

>> Performing a Data Refresh

Perform the following steps to automatically update your chart. **This is typically all you have to do once your charts are setup!**

1. If you are using a spreadsheet or CSV file, update the file to reflect any changes with your organization. Make sure to use the same file name as was used when you originally imported.
   Note: You can point to an alternate data file by selecting Refresh Properties | Data Source.
2. Click on the Data tab (at the top) and the select the 'Refresh Data' button. The 'Data Refresh' Panel is shown.
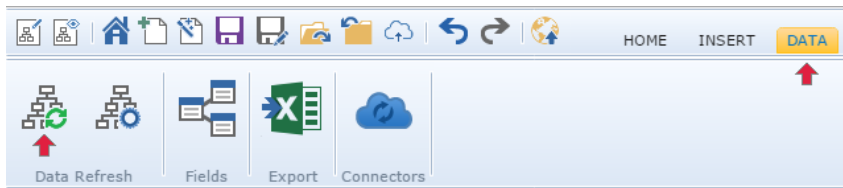
3. Make sure the 'Smart Refresh' button is selected.

4. Click on the 'Refresh' button. Your chart will automatically be updated from your data source.
5. Save your chart after making the changes above.

Step 6: Tips & Tricks

In order to get the best results, review all the tips and tricks below.

1. Management Level Charts are typically less than 50 boxes (because they can get really wide). Contact us orgchartnow@officeworksoftware.com for guidance on creating management level charts containing more than 50 boxes.
2. **Size PDFs to current page** – If you are charting more boxes than will easily fit on a standard page (8.5 X 11 in the US), make sure to select 'Size PDFs to current page' option (look in the Home Tab for the 'Setup' button). This option sets the size of generated PDF documents based on the size of the chart.
3. **Fixed Height Boxes** – If you want all boxes in your chart to have the same height (see example on the right below), use the box layout editor to update the box style you created earlier.
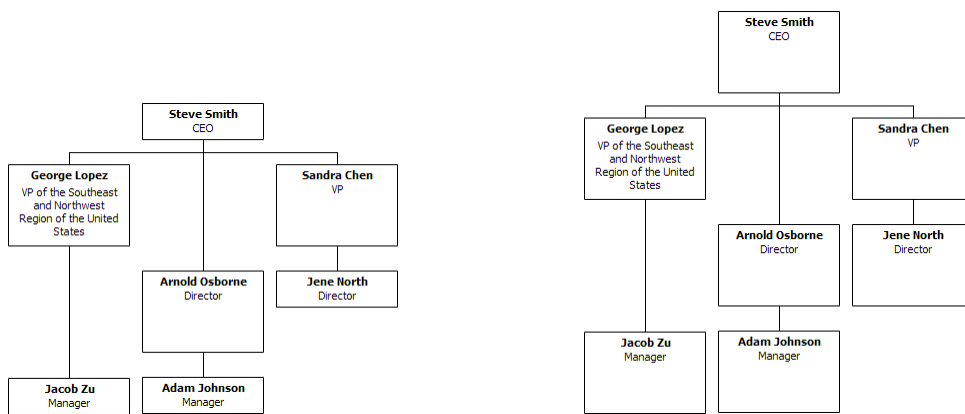

Steps to complete:
a. Select the tallest box in your chart
b. Click on the Layout button (in the Home Tab)
c. Set Box Height to Fixed (see below). Click on the blue arrow to resize the box.
d. Click OK
e. Update the box style you created earlier (See **Updating a Box Style** in Step 3)
f. Refresh your chart (See Step 5)

4. **Reordering Peers** – You may want to reorder peers within a chart. See examples below.
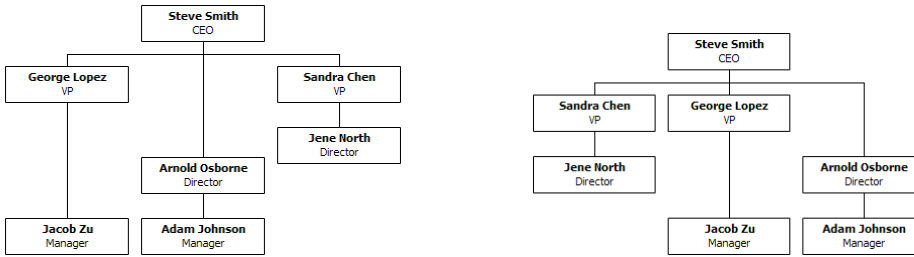
To reorder boxes you'll want to use the 'Move Branch or Box' tool. Watch the following video for more details - https://www.youtube.com/watch?v=0H2pMm67liw

5. **Chart is too wide** – If your chart is too wide, you may want to change the branch styles used at the lowest level of your chart. **Note:** You will need to repeat this step after every refresh.
   a. Make sure the Home tab is selected.
   b. At the lowest level of your chart look for a manager with a large number of subordinates. Select any one of the subordinates.
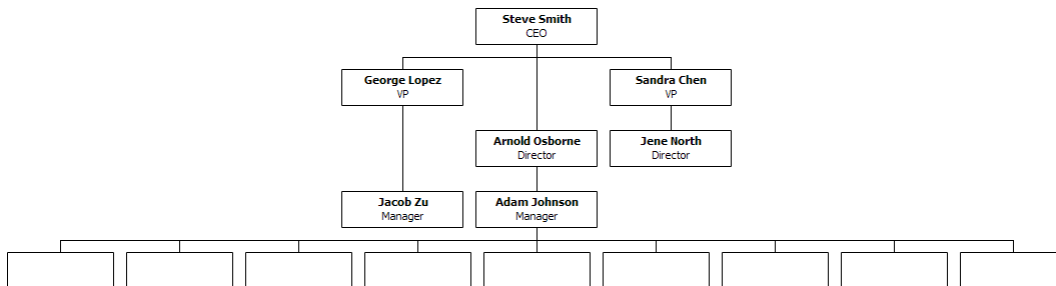   c. Select the 'Branch Styles' button.
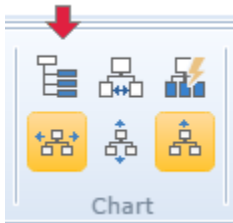
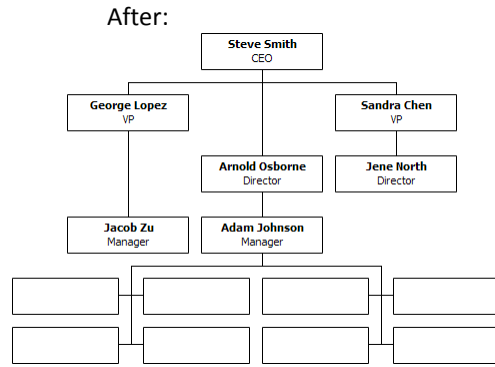   d. Select the desired branch Style. You can reduce the width of your chart by picking the 4 or 6 column style.

   e. Repeat for other managers with a large number of subordinates.

Before:

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After:

Appendix A: Uploading Files to OrgChart Now

1. Click on the 'Upload Manager' button (on the top tool bar)

2. Select a destination directory (on the left).
3. Click on the 'Upload' button (at the top).

4. You will be prompted to select a file from your computer. Select a file and click Open. The file will be uploaded to OrgChart Now.
5. Repeat to upload additional files.
6. Click Exit (at the top) when done uploading files.

Note: For mass uploads (e.g. hundreds of employee photos). Please contact orgchartnow@officeworksoftware.com and request an FTP drop box.