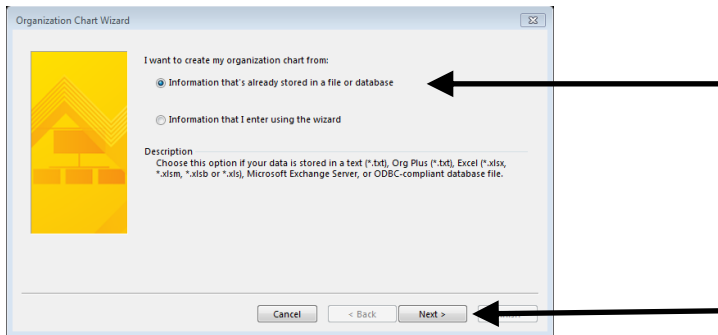


Create a new Org chart drawing using the Org Chart template.

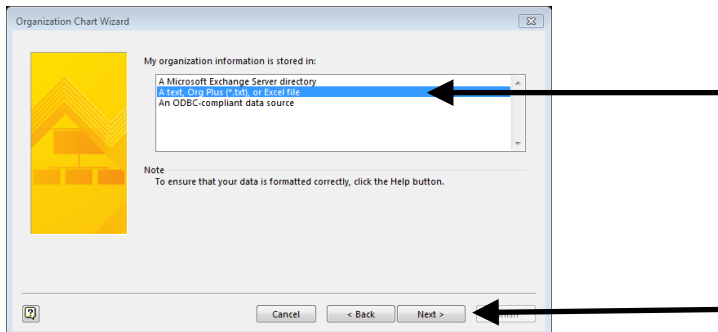
When the new file opens, you will be prompted to use the Organization Chart Wizard. You can use this tool to establish the basic org chart with the data you have in an Excel file. Although this will not be connected back to the source data and as such can not be updated. This step simply gets the data into the file in the chart structure. You do not have to use this procedure but rather build it from scratch with the data.

This tutorial will use the Organization Chart Wizard.

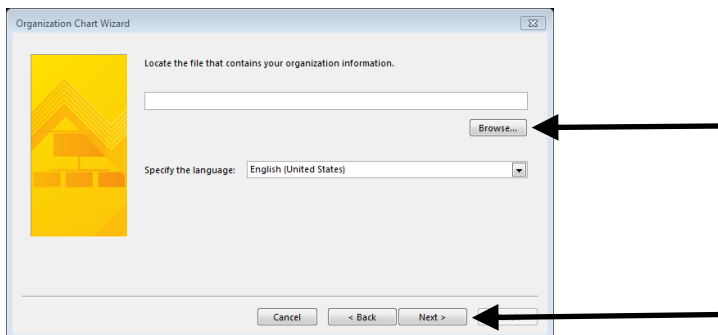
Start by ensuring the first radio button option is active, then click the Next button.



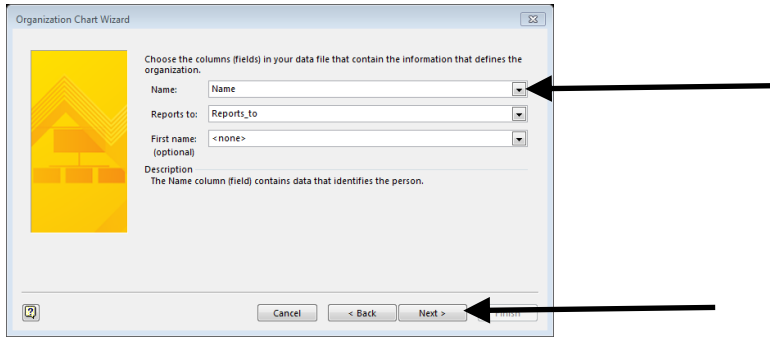
Choose the appropriate type of storage for your data. Excel or text files will use the middle option. Click the Next button.



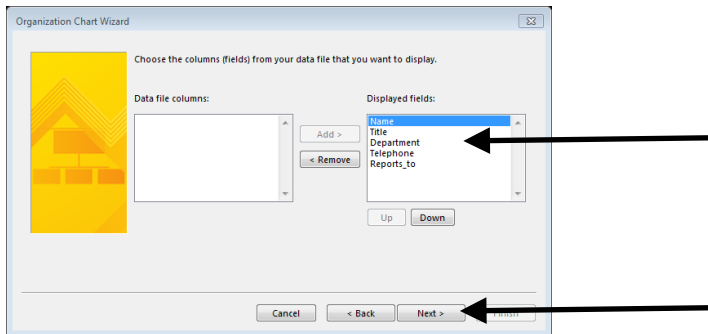
Click the browse button and find the source file. Click the Next button.



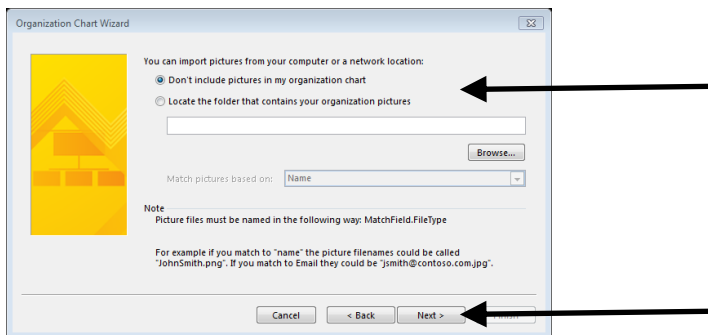
Using the drop-downs for each field, choose the fields to include in the basic structure of the shapes. Click the Next button.



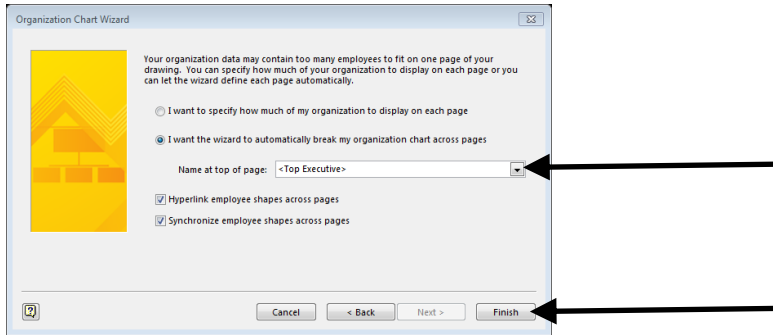
Choose the other columns of data you wish to include and associate with the shapes. This additional data is displayed in the Shape Data Pane. Click the Next button.



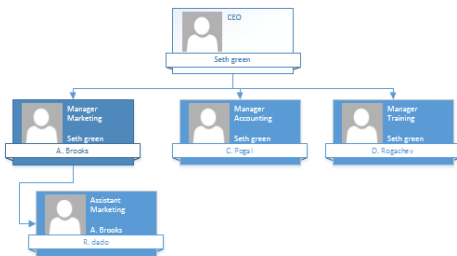
If you have and wish to include pictures of the organization members you can select the appropriate radio button then browse for the images. In this case we will skip adding images. Click the Next button.



In the last window of the Wizard, you can decide how the chart will break across multiple pages. Click the Finish button.

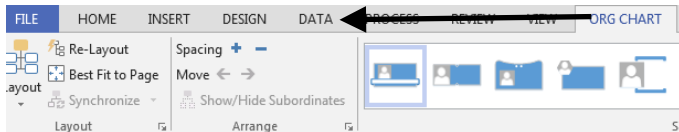


The Chart is created.

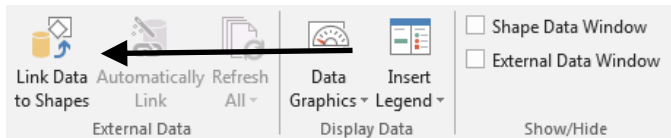


Importing Data to connect to the shapes

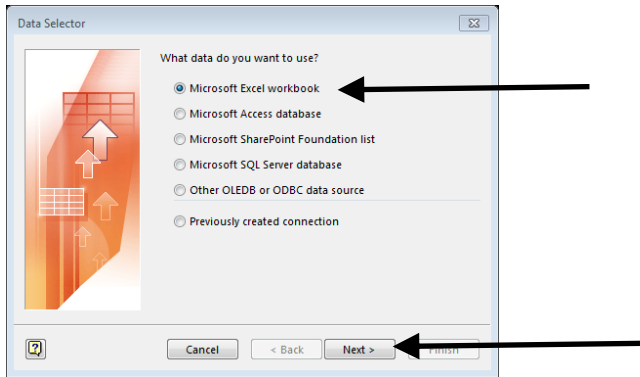
Click the Data Tab in the ribbon.



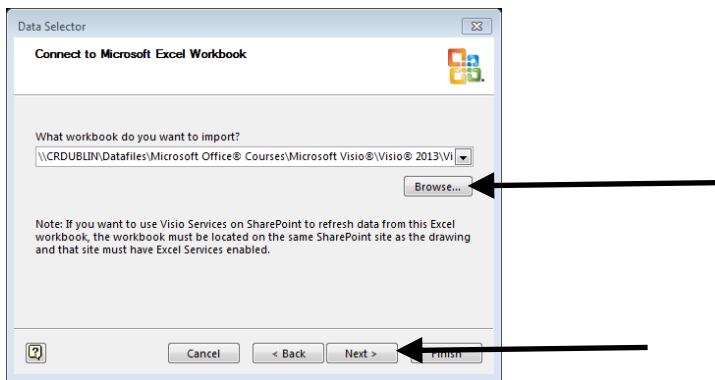
Click the Link Data To Shape button on the ribbon.



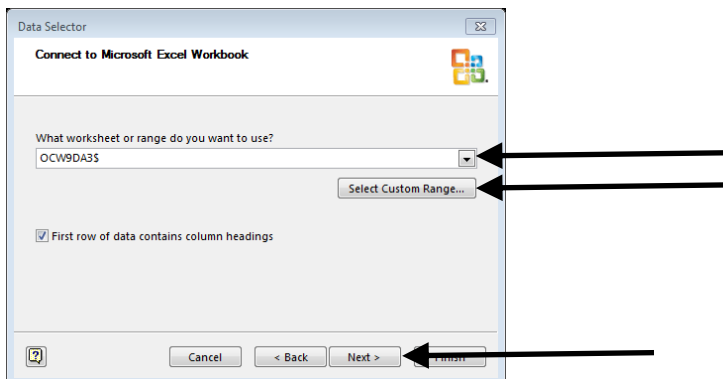
The Data Selector window opens. Choose the file type related to the data and click the Next button.



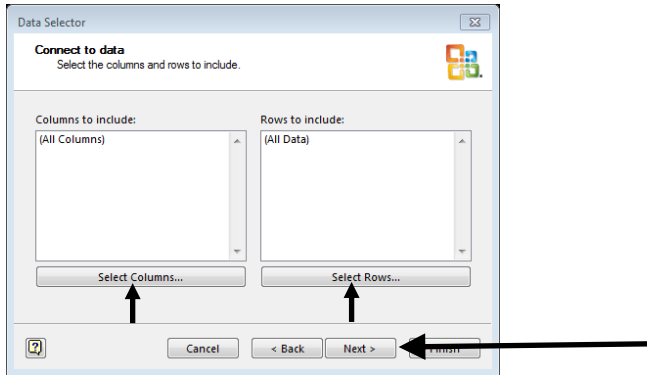
Click the Browse button to search for the source file and click the Next button.



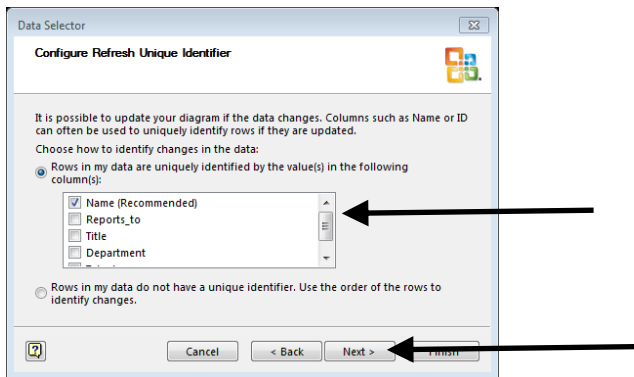
Select the spreadsheet and if needed click the Select Custom Range button to define the area of the spreadsheet. Click the Next button.



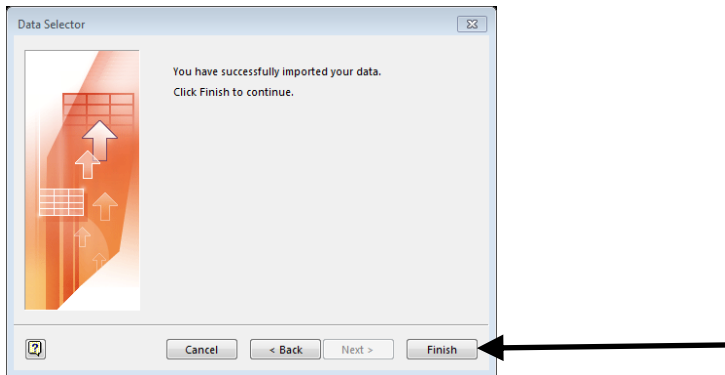
If you need to limit or exclude columns of data in the spreadsheet, click the Select Columns or Select Rows buttons to define only the desired data. Click the Next button.



The data should have a unique identifier for each record in the data, think of an Employee ID. Select the appropriate column of data and click the Next button.



Click the Finish button.



The external Data Pane is displayed at the bottom of the screen.

	Name	Reports_to	Title	Department	Telephone
External Data	Seth green		CEO		
	A. Brooks	Seth green	Manager	Marketing	
	C. Pogal	Seth green	Manager	Accounting	
	D. Rogachev	Seth green	Manager	Training	
	R. dado	A. Brooks	Assistant	Marketing	
	Sam	D. Rogachev	Athletic Tr...	Training	
	Joe	D. Rogachev	Athletic Tr...	Training	
	Dee	D. Rogachev	Personal Tr...	Training	

Connecting the External Data to the Shape

Click on one of the external data records and drag it onto the top shape. A link icon appears beside the record in the External Data Pane and new text is displayed beside the shape in the drawing.

The screenshot shows a software interface with a drawing area at the top and an 'External Data' pane at the bottom. The drawing area contains a hierarchical organizational chart with several shapes representing employees. An arrow points from a record in the 'External Data' pane to the top shape in the chart. The 'External Data' pane contains a table with the following data:

Name	Reports_to	Title	Department	Telephone
A. Brooks	Seth green	Manager	Marketing	
C. Pogal	Seth green	Manager	Accounting	
D. Rogachev	Seth green	Manager	Training	
R. dardo	A. Brooks	Assistant	Marketing	
Sam	D. Rogachev	Athletic Tr...	Training	
Joe	D. Rogachev	Athletic Tr...	Training	
Dee	D. Rogachev	Personal Tr...	Training	

You will need to do this to at least one instance of each shape level in the chart.

Editing the Shape

Right click the shape in the drawing and choose Data / Edit Data Graphic from the menu. The Edit Data Graphic: Data (file name) window opens.

The screenshot shows the 'Edit Data Graphic: Data - OCW9DA3' dialog box. It has a table for mapping data fields to displayed text and options for default position and display options.

Data Field	Displayed as	Position
Name	Text	Default
Title	Text	Default

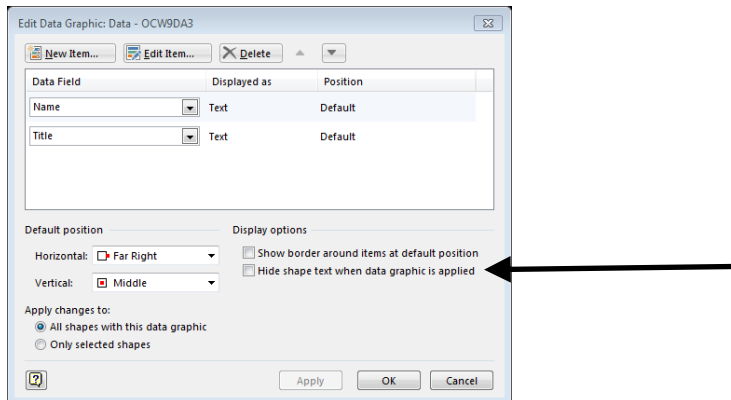
Default position:
Horizontal: Far Right
Vertical: Middle

Display options:
 Show border around items at default position
 Hide shape text when data graphic is applied

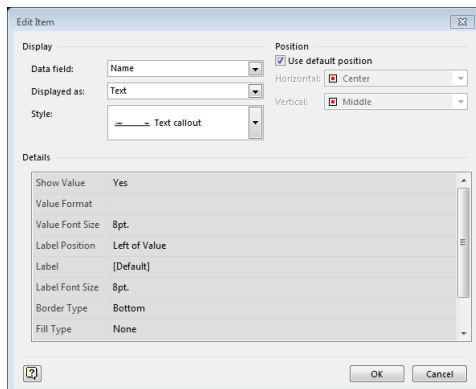
Apply changes to:
 All shapes with this data graphic
 Only selected shapes

Buttons: Apply, OK, Cancel

Check the *Hide shape text when data graphic is applied* checkbox. This will remove the pre-existing text boxes from the shape. Click the Apply button.



To remove the Labels from the text fields, select the data field and click the Edit Item button. The Edit Item window opens.



In this window, you can change which field is being displayed, set the font size, and control the Label Position. In this case, select the Label Position field and choose Not Shown from the drop-down. Click OK when any other edits have been made. Click the Apply button to see your changes, don't click the OK button until you are done with all editing of the shape.

If you need some other information to be displayed with the shape from the data click the New Item button. Select the data source and set up how it will be displayed. Click OK and then Apply to see it. When finished click the OK button to close the window . Select the floating text area and reposition it on the shape.

You will do these steps for each shape level in the drawing. These will be used to define your new set of stencils to use in the chart so all the formatting attributes are as you have defined them.

Build the new Stencil set

Expand the Shapes Pane if necessary. Click the More Shapes button and choose New Stencil from the menu.

Click on the formatted shape in the drawing and drag it into the New Stencil Pane. The shape is added to the stencil. Right click the shape and choose rename, give it a name that makes sense to you. Move each formatted shape level into the New Stencil.

Once all the stencil shapes have been added to your New Stencil, click the Save icon to save and name your new stencil. Save it somewhere easy to find so you can open it in other files later on.



Applying the new stencils and reconnecting to the external data

Now drag the shape stencil from your stencil panel onto the drawing. You will basically now re-build the org chart using the new shapes, since they are based of the original shapes the connectivity functions are still going to work.

Once the shapes are in place, drag the appropriate records from the External Data Pane onto the shapes to dynamically connect the data to the shape. When you need to refresh the data connections, click the Data tab in the ribbon and click the Refresh All button.