

## Creating an Org Chart by Importing Excel Data

OrgChart Professional has the ability to create an organization chart by importing EXCEL or CSV (Comma Separated Value) data. The following describes the process and the format required for the data.

Just for illustration or visualization purposes, let's start with the org chart we want to create.

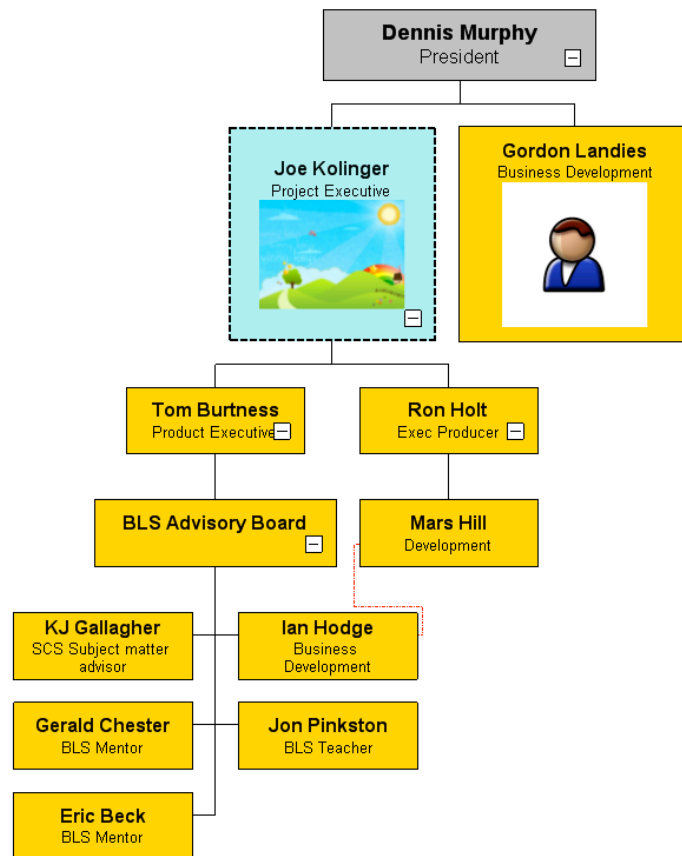


Figure 1 – Example Org Chart

This chart contains 12 people, 11 of whom report to another person on the chart.

Here is what the Excel data looks like:




	A	B	C	D	E
1	<b>Name</b>	<b>Title</b>	<b>Supervisor</b>	<b>Photo</b>	
2	Dennis Murphy	President			T
3	Gordon Landies	Business Development	Dennis Murphy	ORG Guy 2b copy.gif	T
4	Joe Kolinger	Project Executive	Dennis Murphy	Background-vinnykeys.bmp	T
5	Ron Holt	Exec Producer	Joe Kolinger		T
6	Mars Hill	Development	Ron Holt		T
7	Tom Burtness	Product Executive	Joe Kolinger		T
8	BLS Advisory Board		Tom Burtness		T
9	Eric Beck	BLS Mentor	BLS Advisory Board		T
10	Gerald Chester	BLS Mentor	BLS Advisory Board		T
11	Ian Hodge	Business Development	BLS Advisory Board		T
12	Jon Pinkston	BLS Teacher	BLS Advisory Board		T
13	KJ Gallagher	SCS Subject Matter Advisor	BLS Advisory Board		T

Figure 2 – Excel Import Data

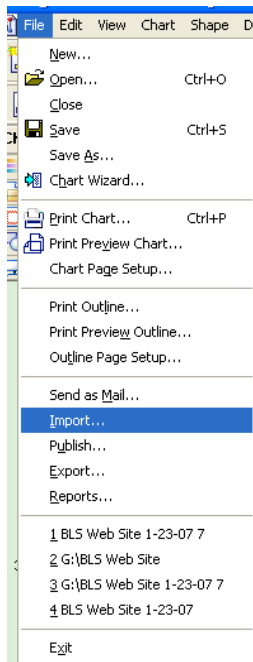
Four columns of data are shown in this example. There are actually more columns in the data file that we have prepared here, since the program can handle an unlimited amount of data on each person in the organization. But for the purposes of this exercise we will focus on columns A and C, since it is these two columns that establish the reporting relationships (connections) in the chart.

Please note that the President (Dennis Murphy) on row 2 does not report to anyone, therefore the Supervisor cell for his row is blank. However you will note that each of the other employees (in column A) have a supervisor declared in column C. Hopefully you can see how the chart in figure 1 represents the data that is shown in Figure 2.

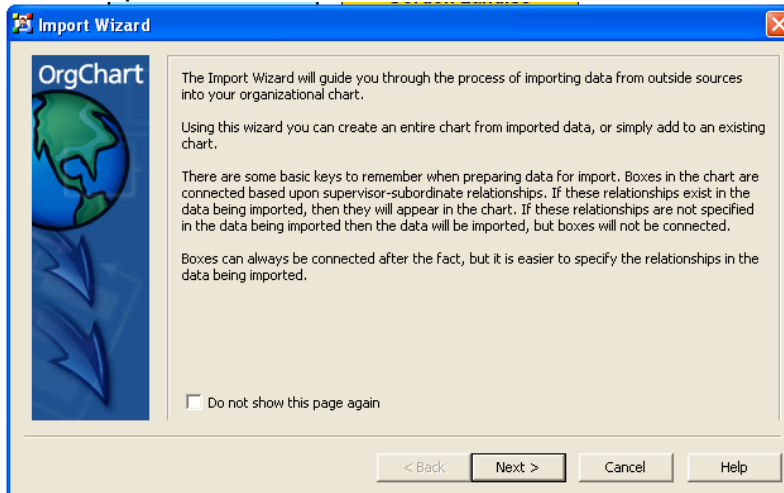
**Important:** Names must be spelled consistently in both columns or the import will not be completely successful.

So using this file we will now run the import process.

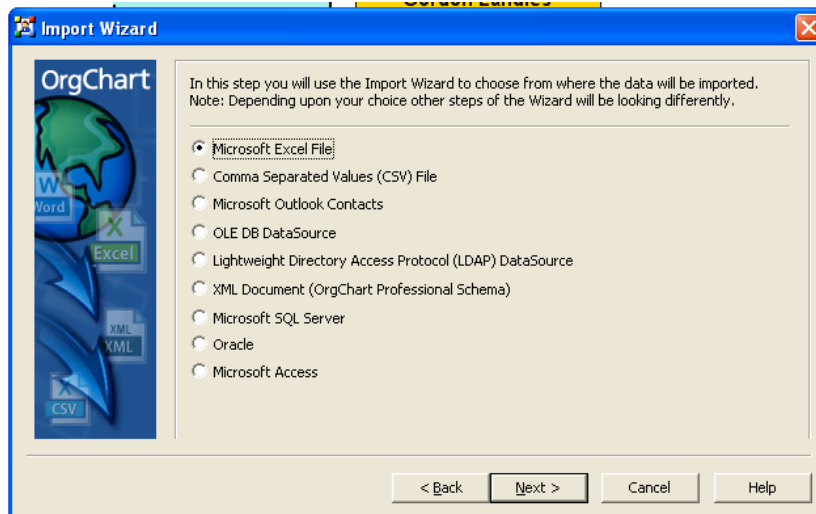
1. File / Import



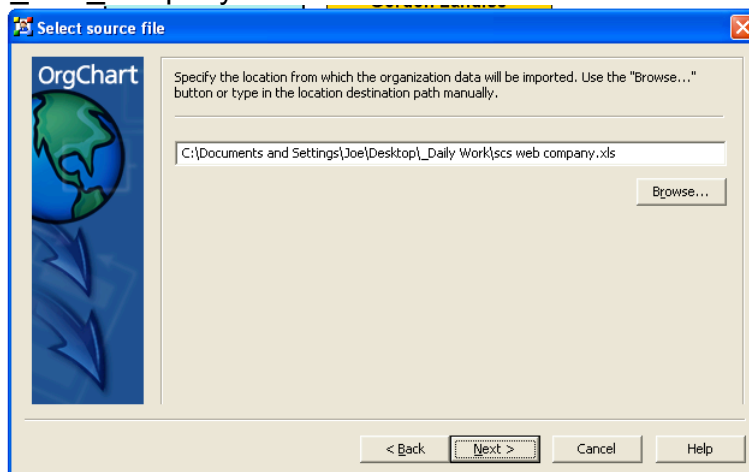
2. Read the import directions and click Next.



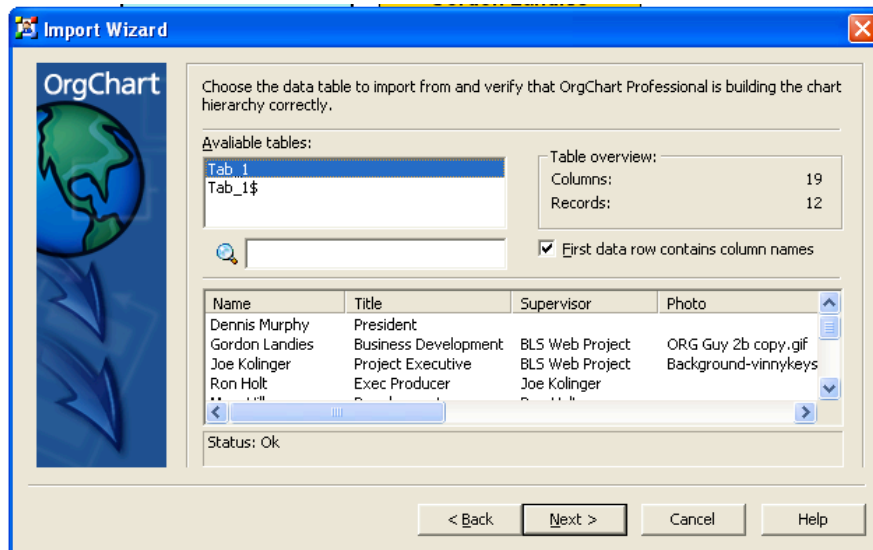
3. Select Excel Import and click Next



4. Select 'Browse' and locate the import file name. In this case it is 'scs\_web\_company.xls'

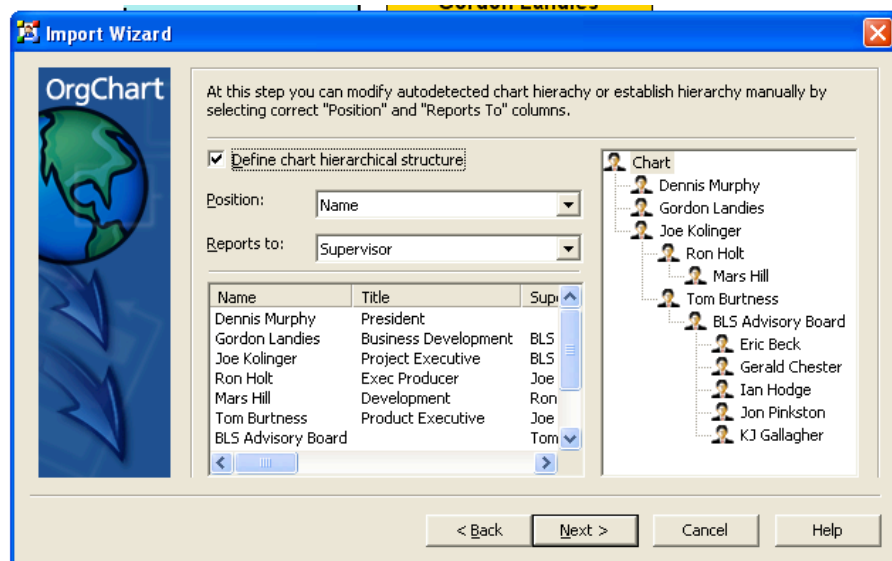


5. Click on Next and you will see this dialog:



6. Choose the first data table (in this case it is Tab 1). Also, we have column head names in our Excel file, so make sure the “First data row contains column names’ box is checked. (This should be checked by default). Click on Next.
7. Next, here is where we determine how everyone in the organization is connected.

Pay very careful attention to the section that determines hierarchical data structure: “Define chart hierarchical structure” should be checked, followed by the correct data column specified for Position (employee) and their boss (i.e., “Reports to”, which in this case is the supervisor column of the data file.

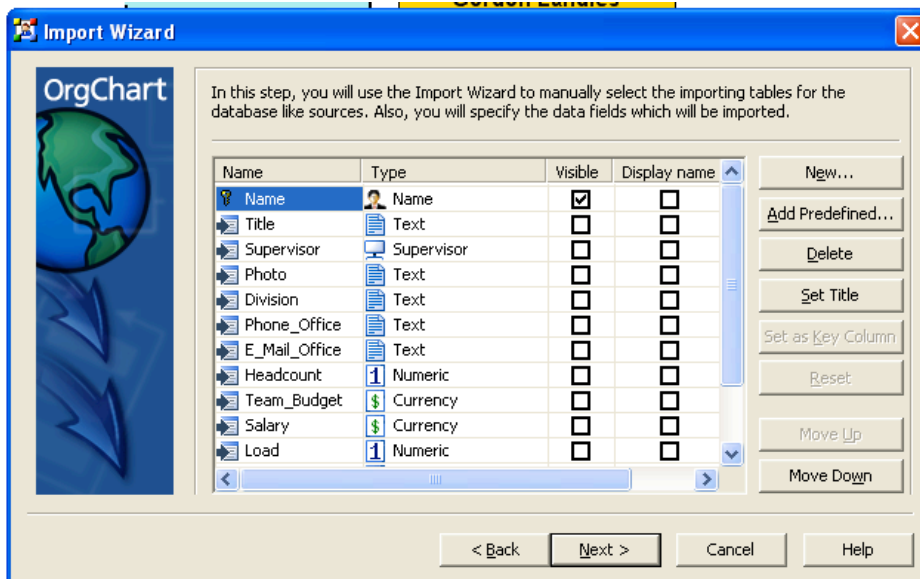




The list of people on the right side of the dialog begins to show you the outline of the hierarchy.

Click on Next.

8. Here we determine the fields to be imported.

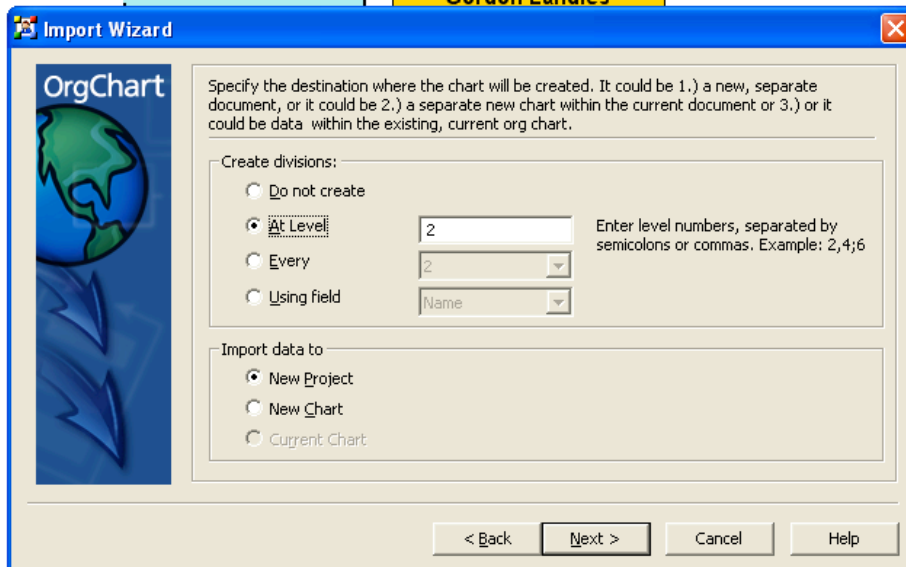


The file we are importing in this example has 14 columns. We can decide which one we want to import later, but here we will determine which one are displayed in the org chart boxes by clicking 'Visible.'

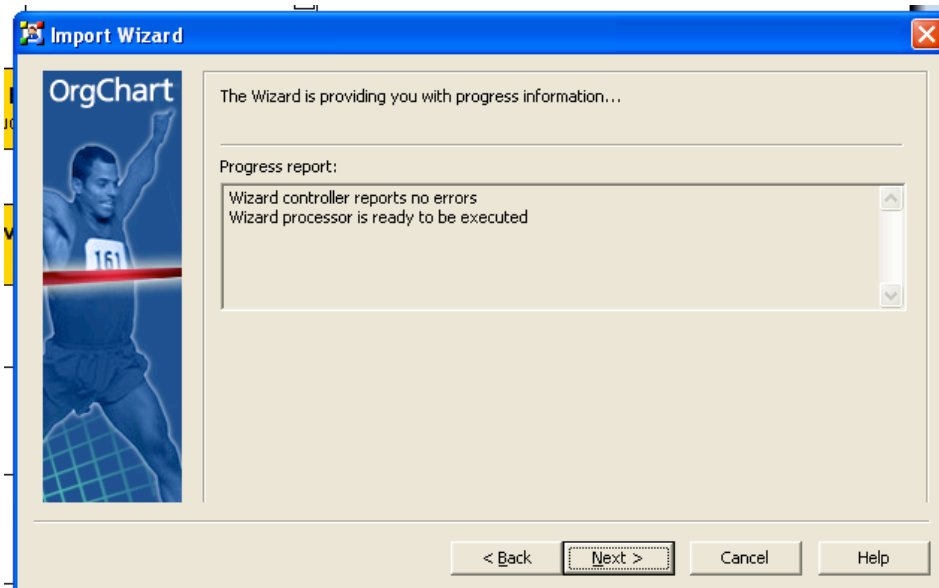
Also note that we can add new custom fields, or predefined fields that were not on the Excel input.

Click on Next

9. Because OrgChart Professional can create charts broken into different sub-charts we will need to specify where we may want sub-charts. If we specify "Do not Create" then all members of the organization will show up on one page. If we specify 'At Level = 2' then the president will show up on one page, and everyone else will be on the second page. If we set this value to '2,3' we will create a chart with three levels of organization. Note that commas may be used to achieve multiple sub-chart breaks. Also note that any sub-chart breaks that you create may be modified after the chart is created. So, if the chart is not exactly what you want upon creation, you make changes to it later.



10. Click Next

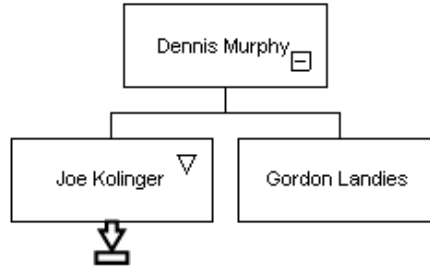


11. Next.

12. Next

13. Finish

14. Here's the chart with all of the data transferred.



### Making Some Structure Modifications

In this example we created the chart with the organization on two sub-charts. The following steps are not part of the import process, but it seems like a good time to point out how a sub-chart can be removed, and also how some simple formatting can be accomplished.

Again, we have the main chart page:

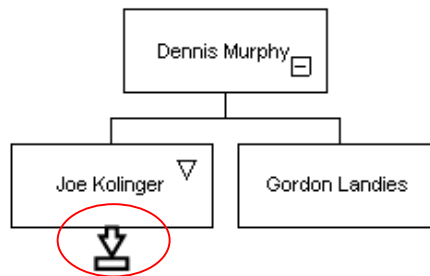


Figure 3 – The newly created org chart (top two levels)

Since we gave instructions during import to break the Sub-Chart at level 2, it shows the first two levels on page 1, and if we click the Large down-arrow beneath Joe, it will take us to a page with the rest of the team.



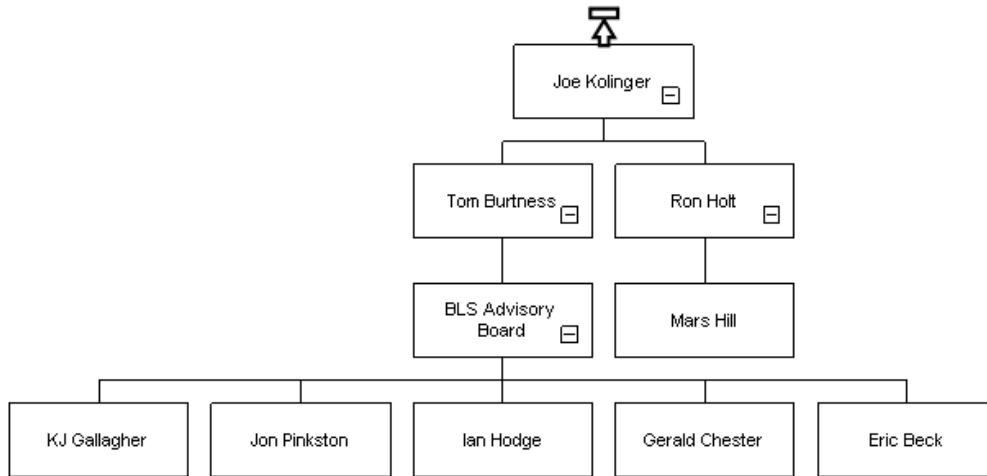
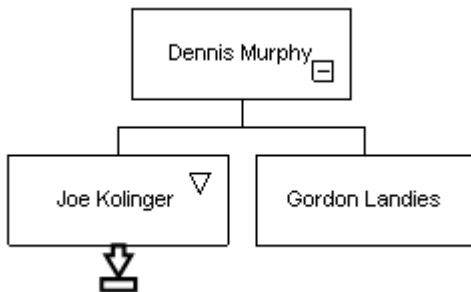


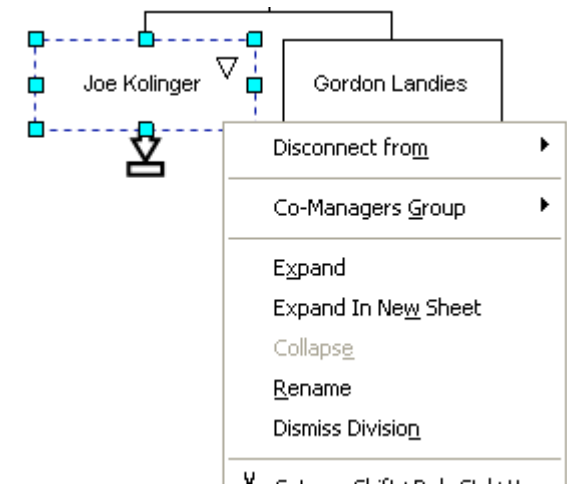
Figure 4 – The rest of the organization is on a separate sub-chart

Next, we will put everyone on the same chart page by ‘dismissing’ or removing the sub-chart break. Here’s how to do it.

1. Click on the large up arrow to get back to the top / main chart page



2. Select the box for Joe Kolinger and right click to bring up the local menu



3. Click on Dismiss Division and the following result is obtained:

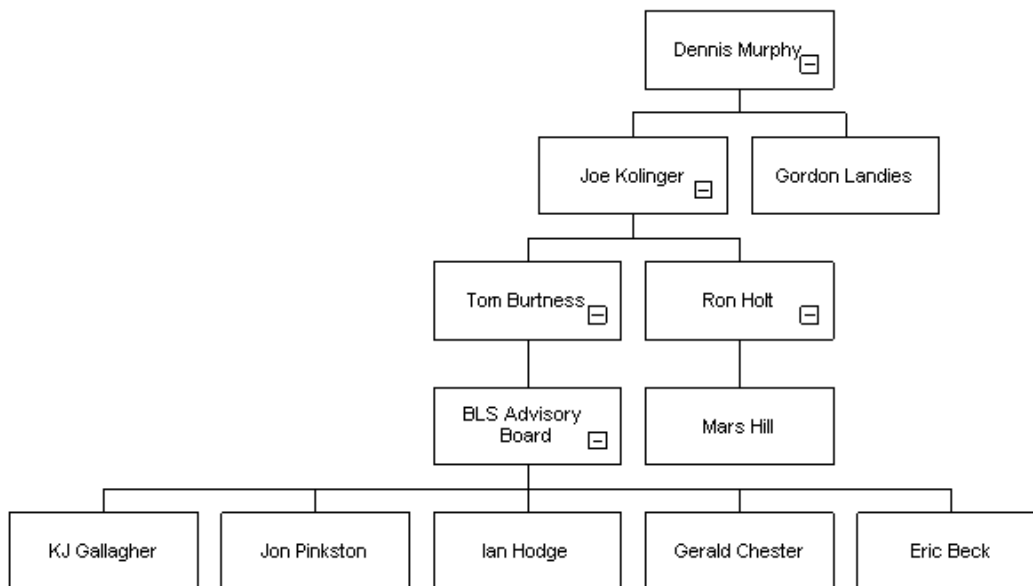
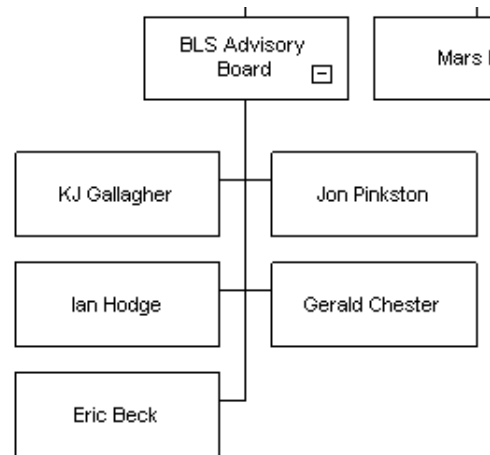
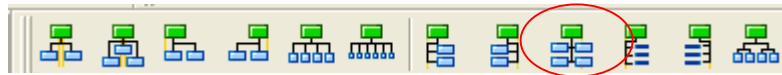


Figure 4. The Chart after Dismissing a Division

4. The chart can be re-arranged to achieve a more compact, balanced look. To do so select any person with multiple subordinates and click on the different arrangement icons. For example, click on 'BLS Advisory Board' and then select the following arrangement Icon.



Experiment with these arrangement tools to get the desired result.

### Excel Import Trouble-Shooting

We have just described the basics for importing an Excel data file using a very simple example. Your organization may be more complex, or your data may require refinement. However whether the organization is 5 or 15,000 the same principle applies:

1. Names must be consistently spelled throughout the spreadsheet columns used for employee and supervisor.
2. Any supervisor must also be established as an employee

Here are some common problems to look for.

1. A supervisor named Andrew H. Brown also appears as Brown, Andrew H., Andy Brown, A. Brown, and Mr. Brown. Pick one spelling and stick with it.
2. Supervisor Andrew H. Brown does not appear in the employee column. If a supervisor is not established as an employee they will not have a chart box, and if no chart box, their subordinates will not be able to attach under it.
3. Circular reporting relationships. i.e., John reports to Bob who reports to John. The program (and your organization) will not accept this.
4. Extra spaces. Sometimes names look like they are consistent from one cell to another, but may have an extra space or a stray comma or period. This too can cause import problems.



OrgChart Professional has been used to create small as well as very large org charts using imported data. If the data complies with the standards specified above the process should be fairly straight-forward.

Keep in mind that after you have created your chart by importing data you can later make changes to the data and 're-synchronize'. Provided that you do not disturb any of the hierarchical data the chart will be refreshed. (This command is under Chart / Resync).

If you have questions contact Support ([support@officeworksoftware.com](mailto:support@officeworksoftware.com))