

# OrgChart Now Co-Head Charts

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Version 1.0.1  
August 14, 2015

# OrgChart Now – Creating Co-head Charts

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## Introduction

Some organizations have multiple leaders (for example, two managing partners or two co-CEOs). This guide details how to create an org chart with multiple leaders.

We strongly recommend that you are familiarize yourself with the **Getting Started Guide** before using this guide.

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## Step 1: Data Preparation

In this guide, we'll create a co-head 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.

### >> **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

#### **Recommended fields:**

- IsAssistant – 0 or 1 (1 indicates the person is an assistant)
- Department – A person's department (e.g. Engineering or Marketing)
- Photo – A reference or URL to an employee photo (e.g. a jpeg file) [See **Getting Started Guide** for more details on photos]

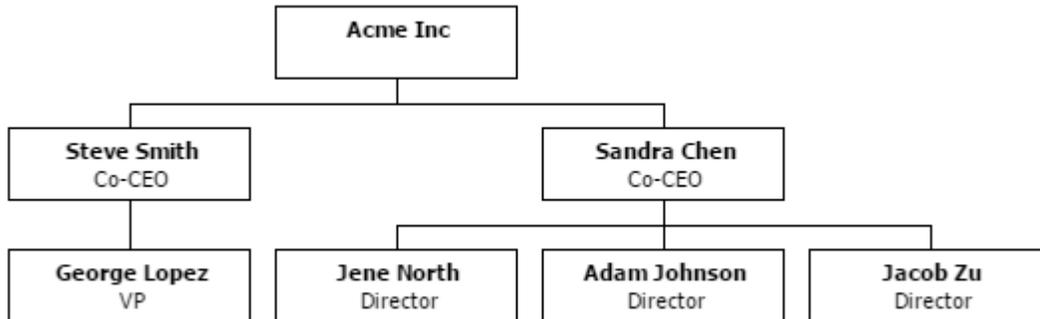
You can any number of additional fields to your data file (for example, location, email address or mobile phone). See the **Getting Started Guide** for more details on data preparation.

#### **Example Data:**

PersonID	SupervisorID	Name	Title
1		Steve Smith	Co-CEO
2		Sandra Chen	Co-CEO
3	1	George Lopez	VP
5	2	Jene North	Director
6	2	Adam Johnson	Director
7	2	Jacob Zu	Director

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The data above will generate the following co-head chart:



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### Step 2: Import Data

In this step, we'll use the Import Wizard to automatically create a chart. After we create the chart, we'll turn it into a co-head chart.

#### >> *Importing an Excel File*

1. Login to OrgChart Now.
2. Upload your spreadsheet to your account (See **Getting Started Guide** 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.

**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.

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10. The 'Subchart Breaks' step is shown. Select the 'Break by Level' radio button. Select 'Level 3' for the 'Start breaks at:' option. You can change how subchart breaks are inserted later (for example, if you have a small data set, you can select the 'Do not insert breaks' option).
11. Click on the 'Next' button.
12. 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.
13. The 'Master Page' step is shown. Select the 'Blank master page' option and then click on the 'Create Chart' button.

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### Step 3: Set as a Co-head Chart

1. Click on the Data tab (at the top) and then select the 'Refresh Properties' button.



2. Select the 'Advanced Options' menu item. The 'Advanced Options' panel is shown.
3. Select the 'Create co-head chart' check box. Click OK.
4. Select the 'Refresh Data' button. The 'Data Refresh' Panel is shown.



5. Click on the 'Refresh' button. Your chart will automatically be reformatted as a co-head chart.
6. Save your chart.

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### Step 4: Managing the Top Box

After completing step 3, a blank box will be shown at the top of your chart. You will need to lock the top box to ensure that its layout and content will be preserved across data refreshes.

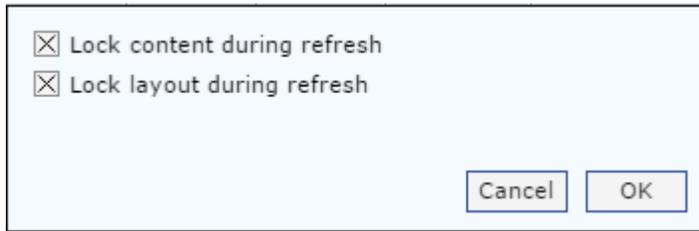
1. Type in the name of your organization in the box (or you can use the box layout editor to format the top box however you like – see the **Getting Started Guide** for more details on the box layout editor).
2. Select the top box
3. Select the Data tab

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4. Select the 'Box Locking' button



5. Select the 'Lock content' and 'Lock layout' option and then click OK.



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### Step 5: Customizing your Chart

Based on your specific requirements, you may want to display more than just Name and Title in your chart boxes. See the **Getting Started Guide** for more details.

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### Step 6: 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.

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### Step 7: Data Refresh

OrgChart Now can automatically update the co-head chart from the data source (Excel file or data connector).

#### >> *Performing a Data Refresh*

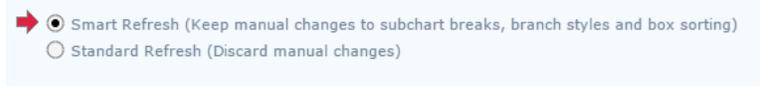
Perform the following steps to automatically update your chart. **This is typically all you have to do once your charts are setup!**

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 then select the 'Refresh Data' button. The 'Data Refresh' Panel is shown.

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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.



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### Step 8: Tips & Tricks

In order to get the best results, review all the tips and tricks in the **Getting Started Guide**. You may want to modify branch styles, reorder peers or insert/remove subchart breaks.