ORGCHARTING

User Manual
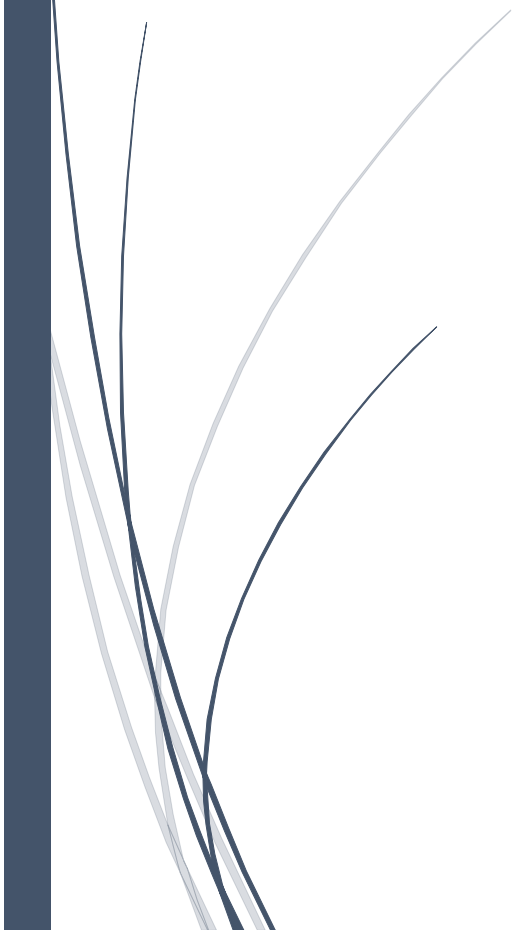
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CHAPTER 1 ORGCHARTING INTRODUCTION

OrgCharting is a powerful organizational chart maker with an easy interface that allows users to create org charts with simply mouse clicking or data file generation. It has ready-made templates and advanced color themes to help you make professional-looking 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 company hierarchy and personnel reporting relationships, so that company managers could gain insight for decision making and strategic planning. Besides, the chart itself can be used as an employee database, through which you can find, manage and update employee information. The view options of OrgCharting allows users to choose or define a special view to display relevant information only for special purposes.

With OrgCharting, you can create org charts that are highly customized, for example, with personalized color scheme, layout style, background, or data field. Once you finish the chart, it's easy to export your chart to lots of file formats such as PDF, JPG, Word, PPT, etc., so tat you can share the chart with others easily. You can also make awesome presentations using the automatic slide deck generation function.
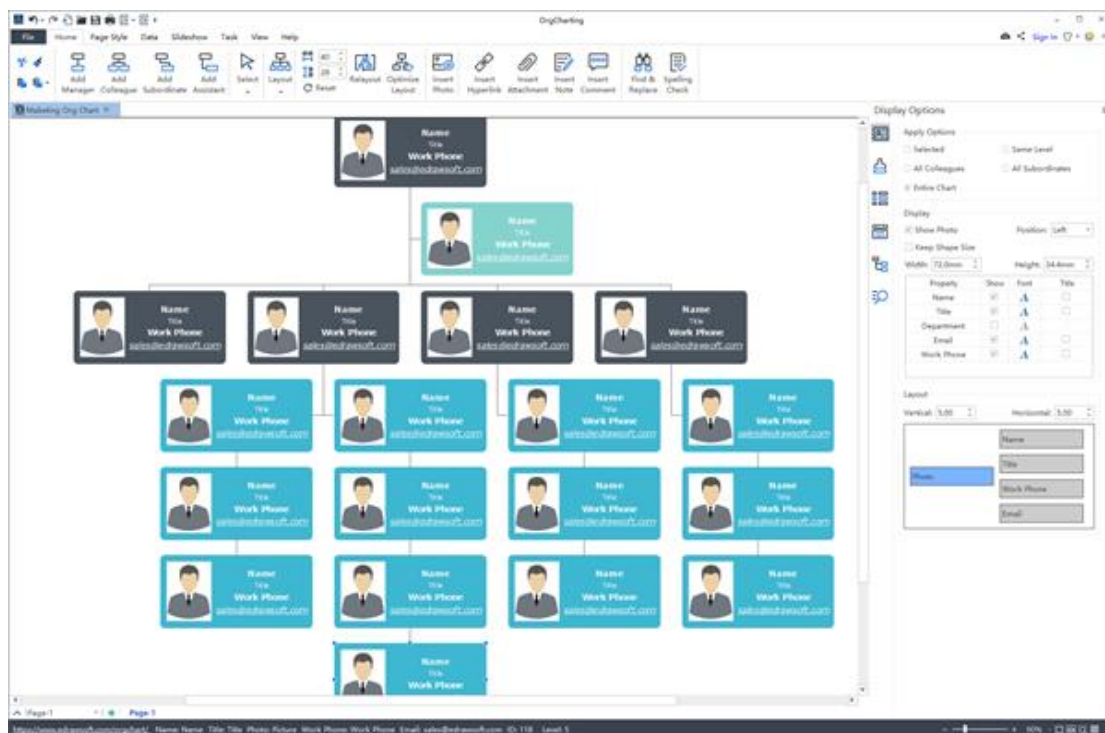
CHAPTER 2 GET STARTED WITH ORGCHARTING

USER INSTALLATION

Download OrgCharting installation package from

https://www.edrawsoft.com/download-orgchart.php, and double click the .exe file to install the

package.

USER ACTIVATION

Once successfully installed, you can register the software with your license code. If you do not

have a license code, you can click **Buy Now** to order.

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

USER DEACTIVATION

Deactivation is necessary if you wish to move OrgCharting from one computer to the other.

Please note deactivation can only be done once every 30 days.

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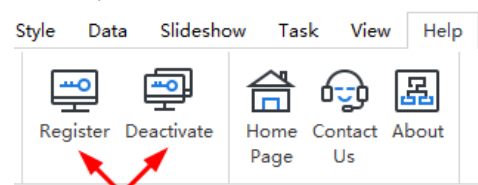
1. Simply go to the **Help** tab, and click **Deactivate**.
2. Once you have clicked **Deactivate**, the OrgCharting software on your current computer
   will turn to unlicensed version, so you can activate the software on another device.

SIGN UP CLOUD ACCOUNT

You can sign up an OrgCharting cloud account and sign in to use the cloud or 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 Tool Bar, Ribbons, Right-side Bar and Status Bar at the bottom.
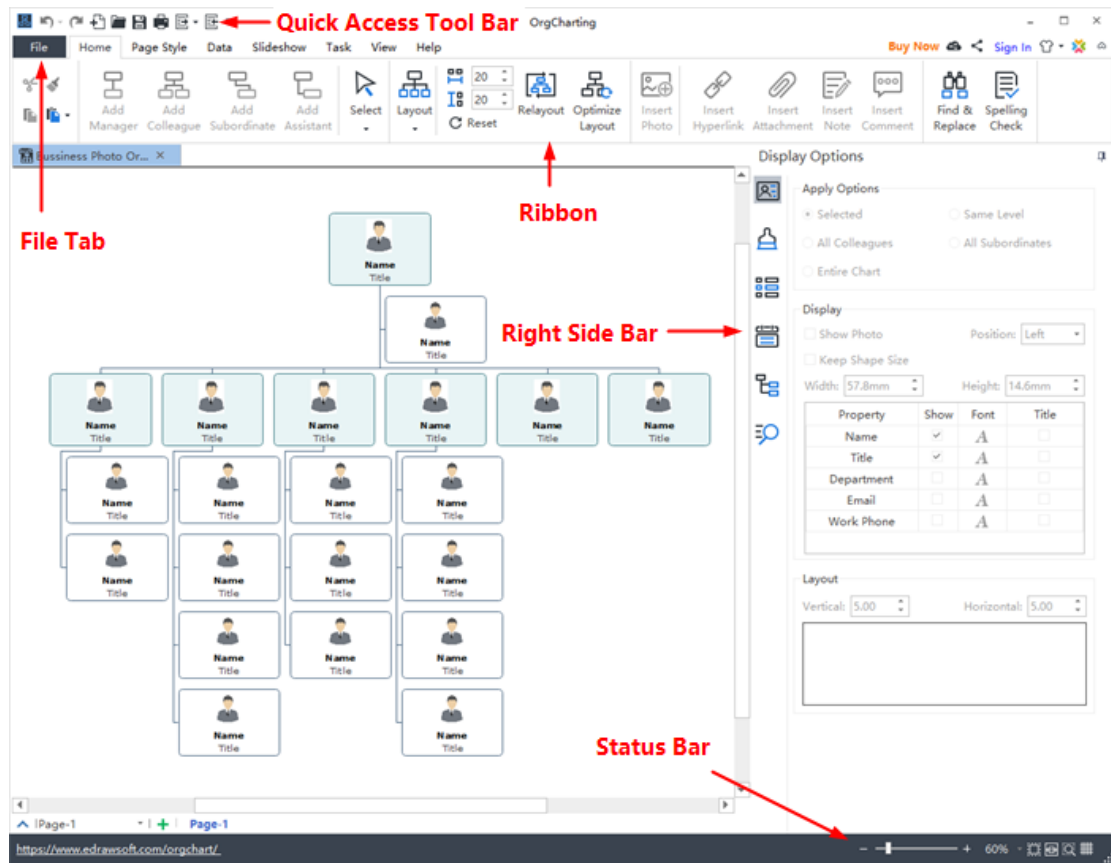
Quick Access Tool Bar

From the quick access tool bar you can find quick tools for Undo/Redo, Create a New Org Chart, Open Files, Save, Print and the Export functions. 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 bar on the top or at the bottom of the Ribbon.

Ribbons

1. Home Tab

From the **Home** tab you can add managers, colleagues, subordinates, assistants and photos; choose layout types, optimizing layouts; hyperlinks, attachments, notes or comments; and set horizontal or vertical distances. -----

2. Page Style

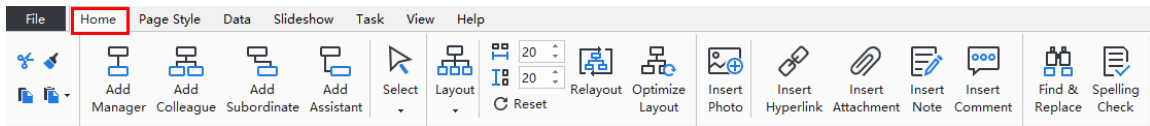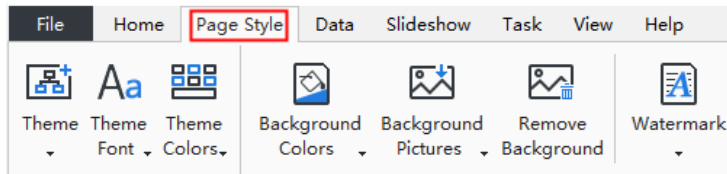The **Page Style** tab is where you can format your org chart. You can select a theme here and choose theme fonts and theme colors. You can even edit or remove the **Background** of your org chart, or custom your own **Watermark**.   -----

3. Data

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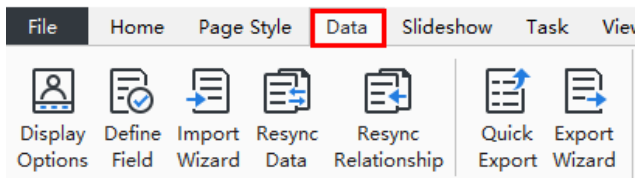
4. Slideshow

From the **Slideshow** tab you can create slides one by one, or auto-generate your slides based on your sub-departments. Feel free to edit or remove any content in your slide pages and once finished, you can preview your work in full screen, and then export PPT or print.
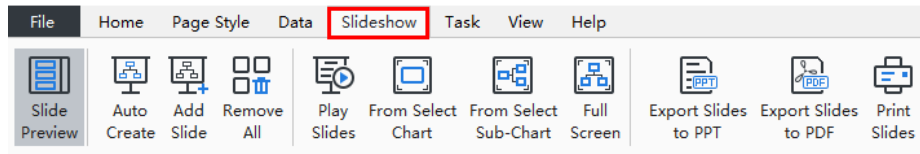
5. Task

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

6. View

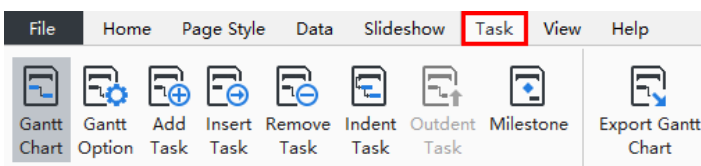The **View** tab shows different view options of your org chart. You can choose to zoom in or out your work, or review it in a whole page. The **Tree Outline View** allows you to edit **Data Field** content which synchronizes with the org chart in the work area.
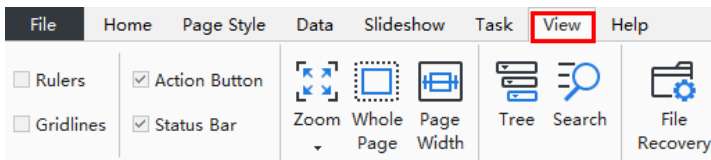
7. Help

From the **Help** tab you can easily find related guides for reference including Tutorial, FAQ, Contact Us and many Keyboard shortcuts, and buttons to register or deactivate the software.
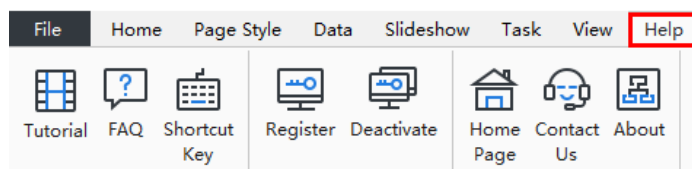
Right-Side Bar

The Right-Side Bar has 6 tabs in total: **Style**, **Display Option**, **Property**, **Views**, **Tree**, and **Search**.

1. Display Options

In the **Display Options** section, you can choose either to show or hide your employee's photo, set the order , font, and filed etc. for displaying your employee details.

2. Style

In the **Style** section, you can change the background color, background image, watermark, theme style, theme colors, and the overall text fonts.

Style
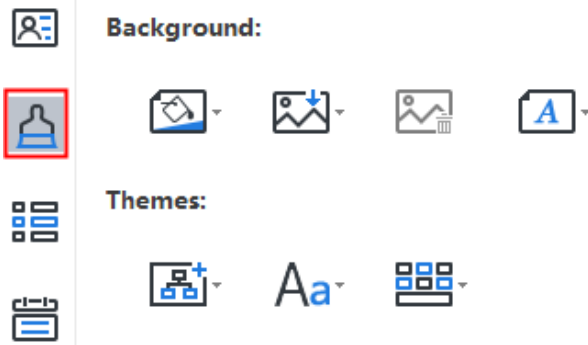
3. Views Options

The **Views Options** provides a choice of the different display options of your data. Individual chart elements and data excluded from your choice are hidden in this mode. Usually, a systematic company organizational chart contains massive information of different categories. However, a person at a specific position may not always want to view all the data. For example, if you are an HR, you can click **HR Details** to view only information about human resources.

Views Options
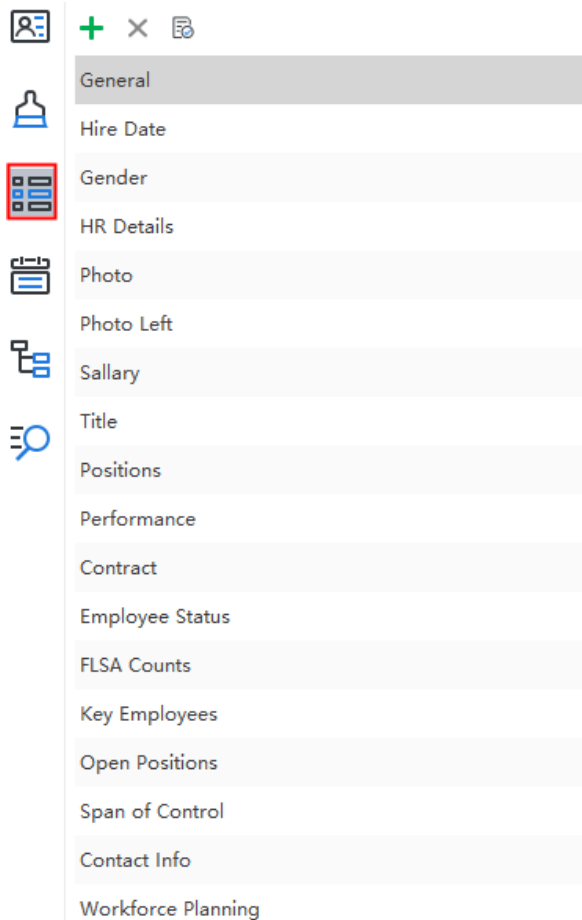
4. Data

In the **Data** section, you can see full details of an individual employee in your current org chart. For example, the name, title, photo, department, contact details and so on.

5. Tree

In the **Tree** section, you can quickly go through all the field information in your current org chart, and make adjustments by double-clicking one of the employee details.

6. Search

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

START AN ORG CHART

You have three 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 template or example in **File** > **New** > **Local Examples**. Your can personalize the selected org chart template or example that are fully editable.

Option C: Left-click one of the org chart template or example in the **File** > **New** > **Local Examples**, then left-click the **Create** button to start your customization.
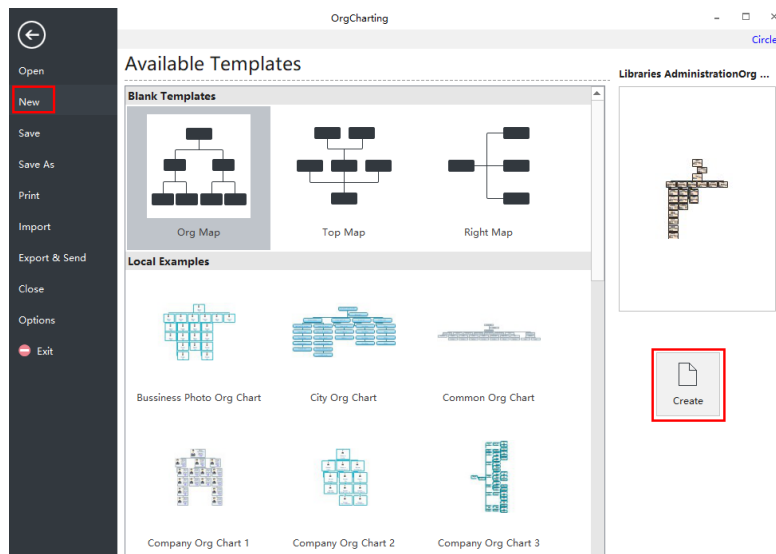
SYSTEM REQUIREMENTS

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

- Mac OS X 10 and later

- Linux (Debian, Ubuntu, Fedora)

- 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 in two ways.

1. Select a box, then press **Shift**+**Enter** keys on the keyboard.

2. Select a box, then click the **Add Manager** Button on the **Home** tab.

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

ADD AN ASSISTANT BOX

(Alt+Enter)

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

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

SELECT BOXES

You can select boxes by types or levels. Click the **Select** button on the **Home** tab. Alternatively, you can right-click a box and go to the **Select** option to add 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
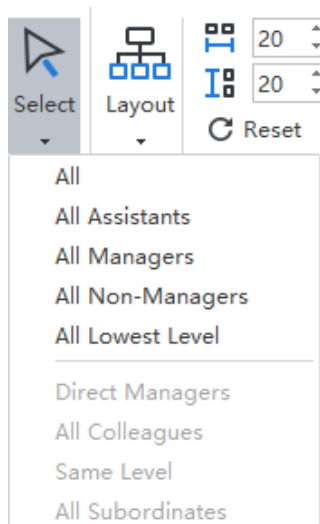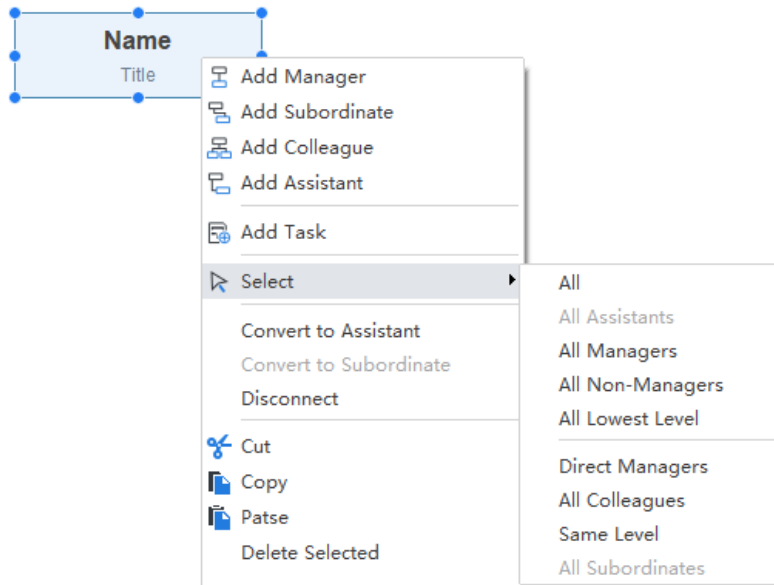
MOVE BOXES

You can move a targeted box to different directions, such as 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 position) can be rearranged and moved into different positions.
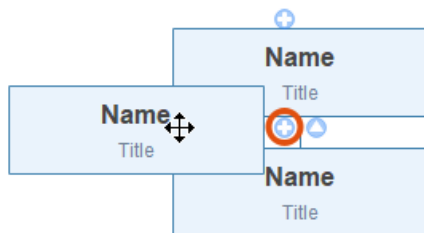
DELETE BOXES

(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 the **Delete Selected**.

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

4. The remaining subordinate boxes will be promoted up one level.
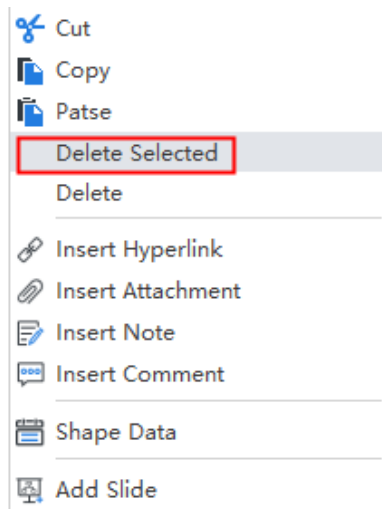
Delete a Selected Box and All of Its Subordinate Boxes

You can delete a box with all its subordinates boxes.

1. Select a box.

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

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 the other.

SHOWING PHOTOS ON THE 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.

Insert a Photo from Files

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.

2. The default position of the photo will be added to the left side of the box. You can change the position of the photo by selecting the drop-down menu of the **Position**.

INSERT AN ATTACHMENT

(Ctrl + H)

OrgCharting supports inserting attachments without quantity limitation. Attachments can be saved automatically in the org chart.

1. Click a box.

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

3. Press **Path** to select an attachment.
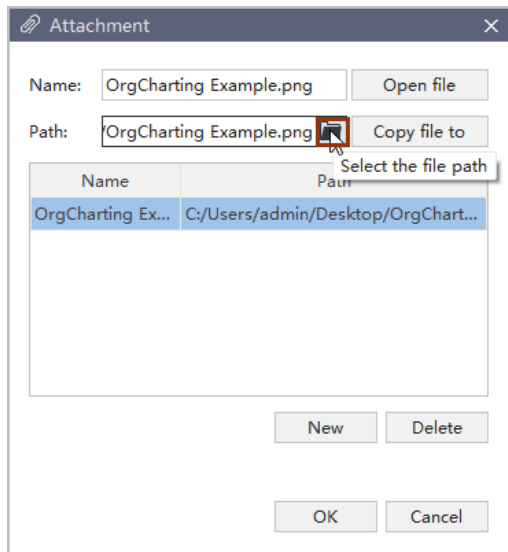
4. Change name for attachments if necessary.

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

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

Tips:

Attachment icon is on the top right corner of topic. Hover the mouse cursor on the icon you can see the name of the attachment. Click the attachment name to open the attachment.
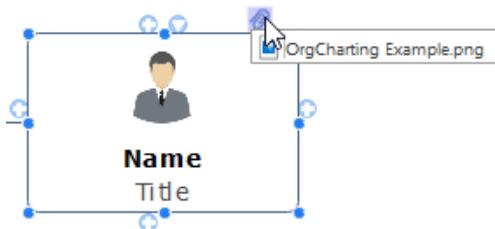
INSERT A HYPERLINK

(Ctrl + K)

Hyperlink is convenient for org chart references as external documents including current documents, files and applications, and internet addresses.

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**.
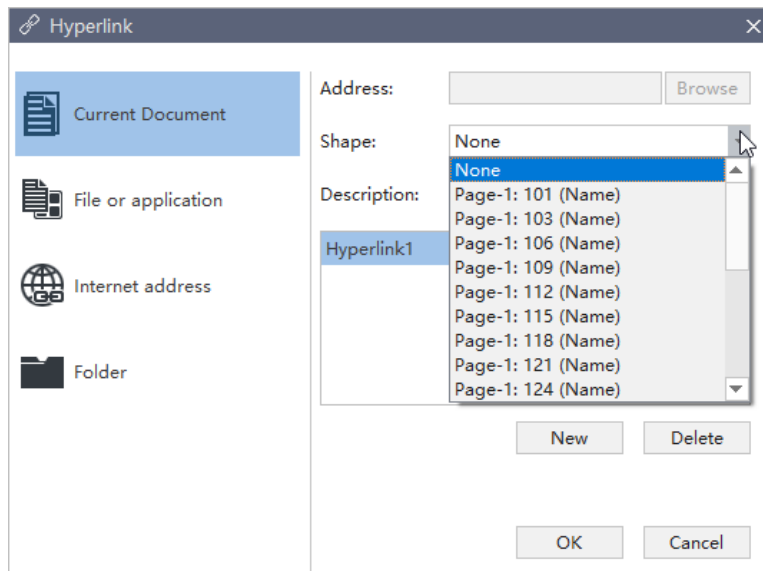
4. To link to a specific shape, you can choose a shape ID from the shape list.

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 File or Application

1. In the **Type** list, choose the **File or Application**.

2. Click **Browse** and navigate to a file.

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

4. Click **OK**.

Change or Delete a Hyperlink

1. Select the shape to change or delete a hyperlink on a shape.
2. Click **Hyperlink**.
3. To change a hyperlink, select the hyperlink in the hyperlink list, make the changes that you want, and then click **OK**.
4. To delete a hyperlink, select the hyperlink in the hyperlink list, click **Delete**.

Tips:

Hyperlink icon is on the top right corner of topics. If you move the pointer to the icon, you will see a link for you to click.

ADD A COMMENT

(Ctrl + Shift + T)

Commenting on the specific box by a collaborative team is a highlight for synergy. You can receive praises and suggestions from your mates and supervisors directly with 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 dialog box.
4. Click **Send** after you editing all the comments.
5. Click **Modify** in the bottom of dialog box to edit the current comment.
6. Click **Delete** to remove a comment.
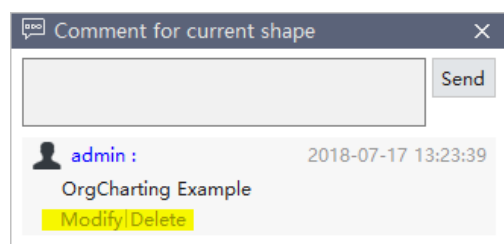
When a comment is added, there will be a green chatting icon showing on top right corner of the box. If you move cursor to the icon, you will see your name, date and comment.

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

(Ctrl + T)

As org charts are always concise, 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 targeting boxes.
2. Click **Insert Note** on the **Home** tab, or Right-click the box and select **Insert Note** option.
3. Type in your note from the pop-up Note window.
4. Click **Picture** icon to add pictures.
5. Click **Calendar** icon to insert date.
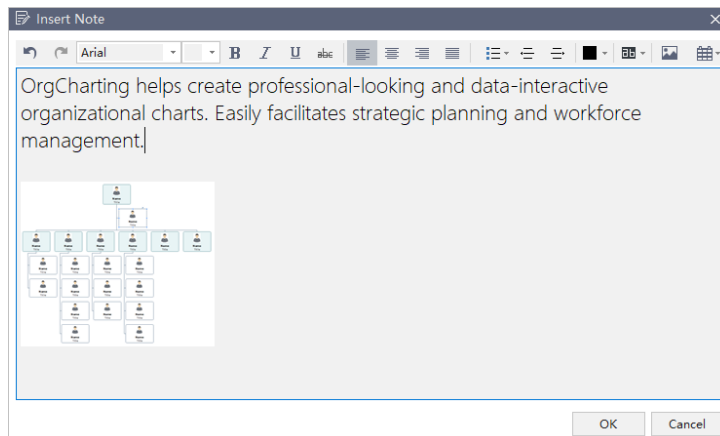
6. Edit text formats with text formatting options on the toolbar.
7. To check your notes, hover the cursor over the **Note** icon.

CHAPTER 4 ORG CHART LAYOUT OPTIONS

CHANGE THE ORG CHART LAYOUT

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 overall chart arrangement and growth directions of all shapes.

Change the Overall Chart Layout

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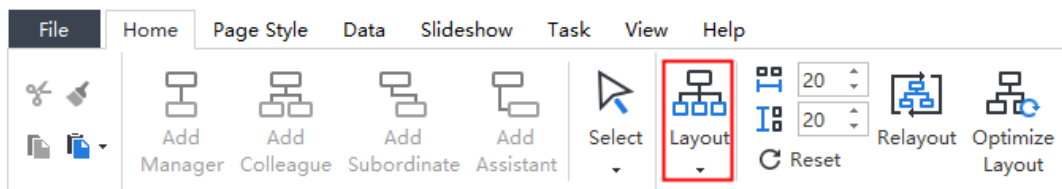
3. Select the layout style of the overall org chart.
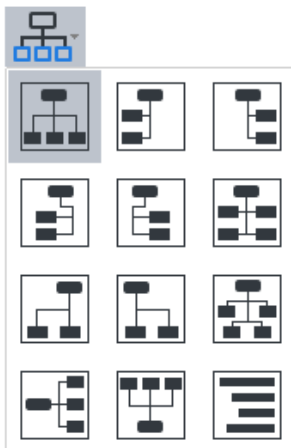
Optimize Layout

The **Optimize Layout** button in 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:
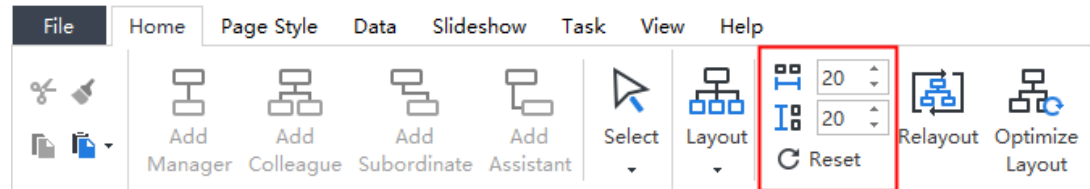
1. Go to **Home** tab, click the up or down arrow to increase or decrease the distance.

2. Press **Enter** to set the adjustment to your chart.

3. Or type in the number you need in the blanks directly and press **Enter**.

Tips:

1. The maximum value is horizontal 200 and vertical 200, and the minimum is horizontal 20 and vertical 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).
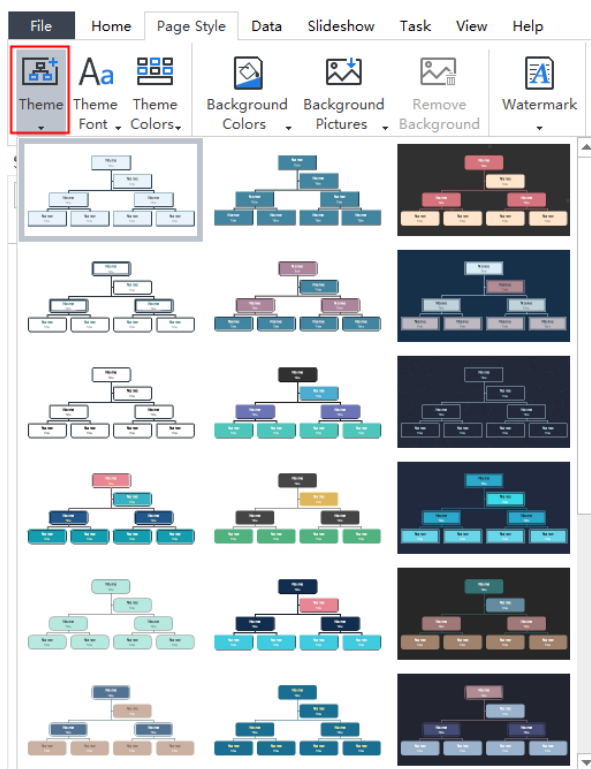
Click the **Theme** button from either the **Page Style** tab of the ribbon, or **Style** panel of the Right Side Panel.
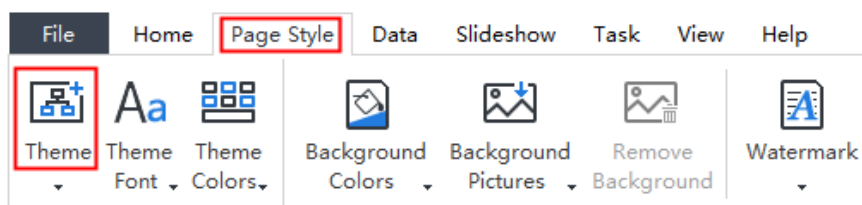
Drag the scroll bar to choose your desired theme.

Change Theme Font and Theme Color

The automatic formatting for all the shapes and objects on the chart is determined by the chart's theme. After selecting a theme, you still have a choice of changing theme fonts and theme colors.

1. Click anywhere on the blank area.

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

3. Then click the **Theme Font** and **Theme Colo**r buttons.

Themes:

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.
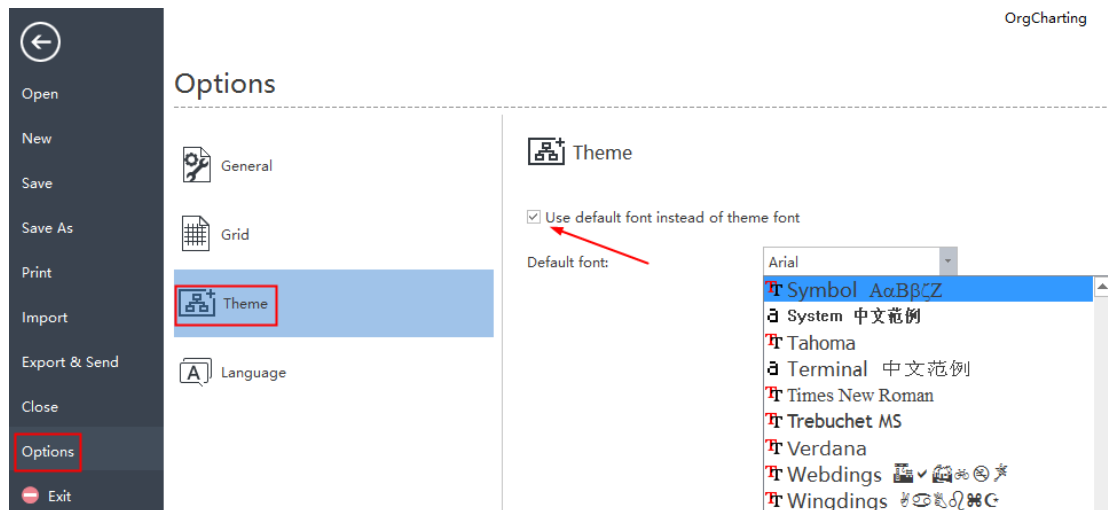
BACKGROUND

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

Background:

Background Colors

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

Background Images

Edraw Org Charting has a wide range of predefined background images to enhance the look of your chart. You can add these background images from the right sidebar, or upload your own background images from local disk.

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
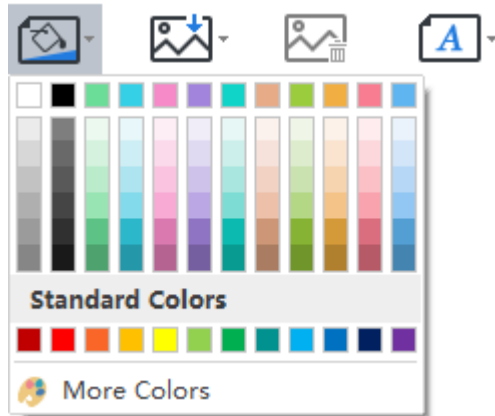
You can insert your own image as background.

1. Click the **Background Pictures** button .

2. Click **Browse from file** and navigate to the image file.

3. You can drag any image from a file list on the Internet (for example, from Google) into the image preview area in the dialog to add it as a chart background.
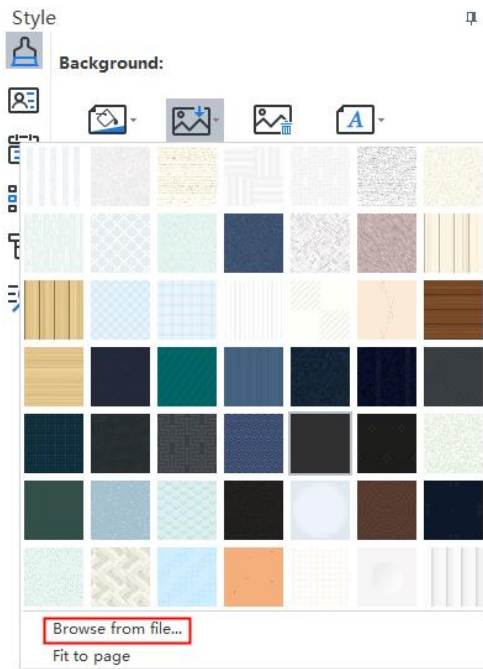
Add a Background Watermark

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 .

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

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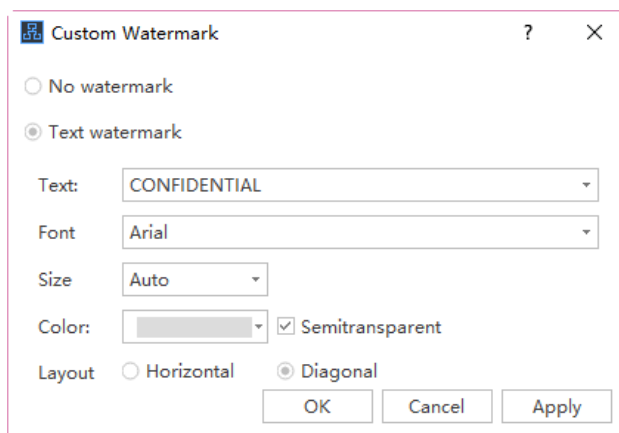
5. Click **Remove Watermark** when you don't need it.

Remove Background

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

CHANGE SHAPE FILL COLOR

Fill refers to the interior of a shape. You can change shape fill color by 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.
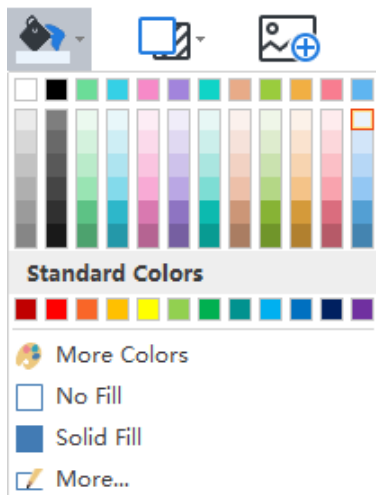
No Fill

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 are Theme Colors. They are predefined color sets of the current theme.
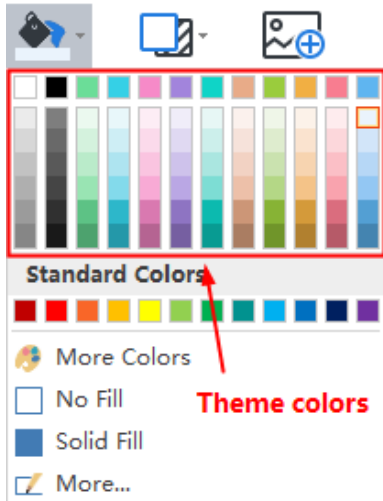
More Colors

To use colors that are excluded from the theme colors or standard colors, click **More Colors**. From 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.
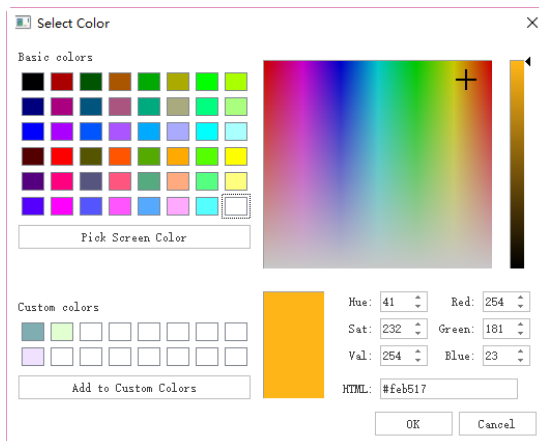
Transparency

To change the transparency, you can move the Transparency slider, or enter a number in the shape 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).
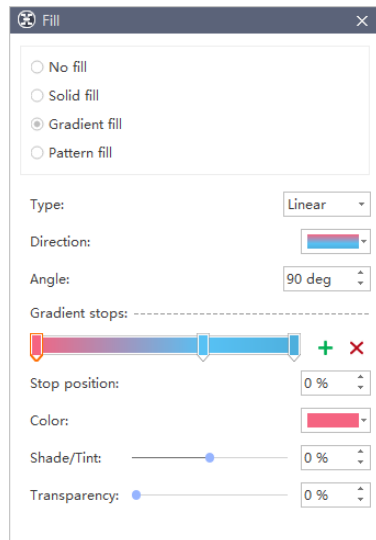
Gradient Type

To specify the direction when drawing your 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 as the Type.

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 gradient non-linear.

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 shape 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**.

Transparency

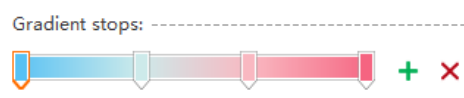To specify how much you can see about the shape at the specified Stop position, please move the Transparency slider or enter a number in the shape next to the slider. You can vary the % of transparency from 0 (fully opaque, the default setting) to 100 (fully transparent).

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.
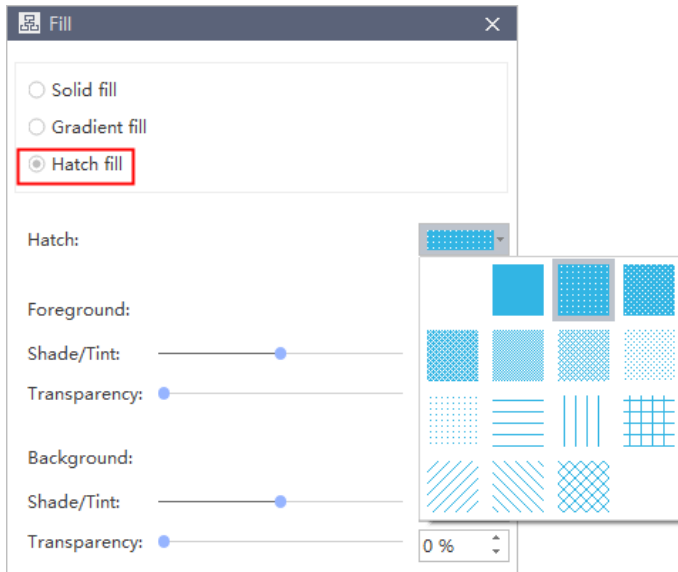
CHANGE SHAPE SHADOW

On the **Style** panel, click the **Shadow** button in **Shape** group, and then choose your preferred built-in shadow effect.

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**.
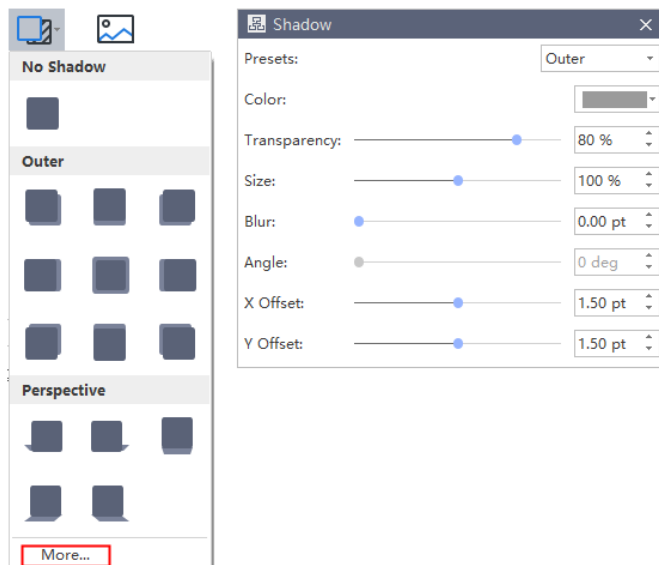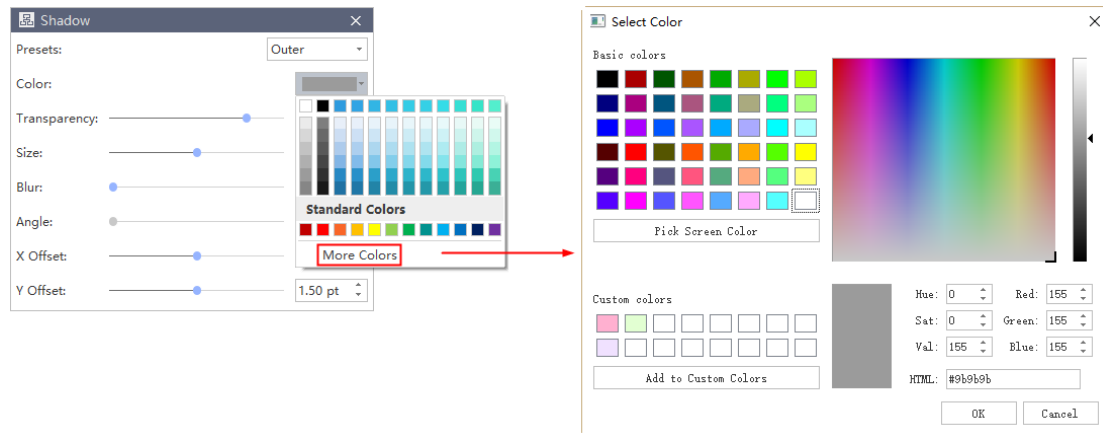

Shadow Transparency

To specify how much you can see about the shadow, move the Transparency slider or enter a number in the shape 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 size of the shadow based on the original object, please move the **Size slider** or enter a value in the shape next to the slider.

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.

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CHANGE COLOR AND STYLE OF SHAPE BORDER

1. Select the shape you want to change.
2. On the **Style** side panel, in the **Border** group, you can change border color, line weight, dash type and line round.

Border:

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

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

- To change the border weight, click the Weight button , and then choose your preferred line thickness.

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

CHANGE SHAPE FONT

1. Select a shape or multiple shapes.
2. On the **Style** side panel, in the **Font** group, change the text font type, font size, align, bullet, bold, italic, underline, line spacing, or text color.

Font:

Click the following buttons to achieve corresponding font effects:

- **B** Bold the selected text.
- *I* Italicize the selected text.
- U Underline the selected text.
- abc 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.

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CHAPTER 6 DATA

VIEWS OPTIONS

The **Views Options** provide a choice of the different display options of your data. Individual chart elements and data excluded from your choice are hidden in this mode.

This area is located at the right side panel. Usually, a systematic company organizational chart contains massive information of different categories. However, a person at a specific position may not always want to view all the data. For example, if you are an HR, you can click **HR Details** to view only information about human resources.
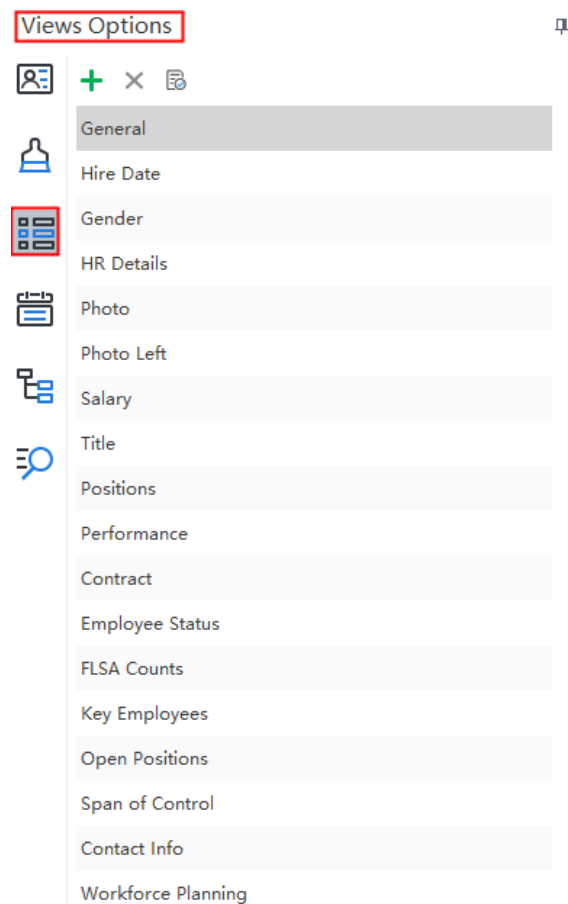
Add New View

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

Follow the steps below to add a new view:

1. Go to **Views Options** on the **Right Side Bar**, click the **Add New View** button ➕.
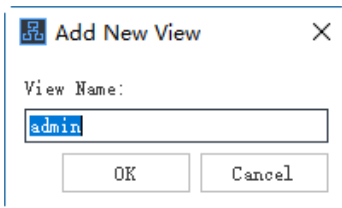
2. Type in the name of the new view and click **OK**. Here I name it "Hobbies & Interests".

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 together with the predefined ones, and available to be added to your chart or a custom view anytime.
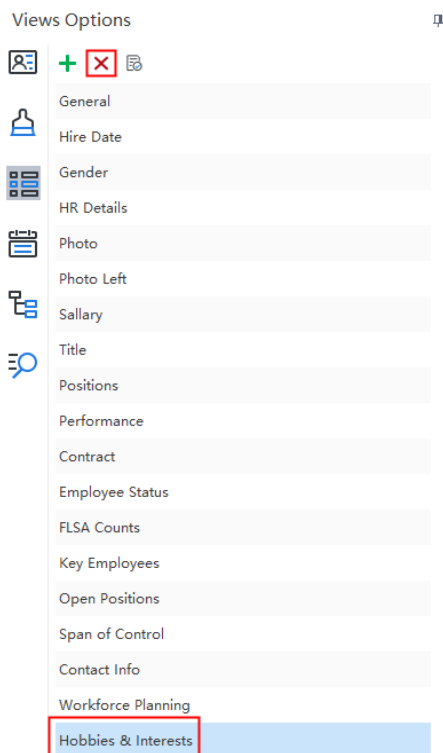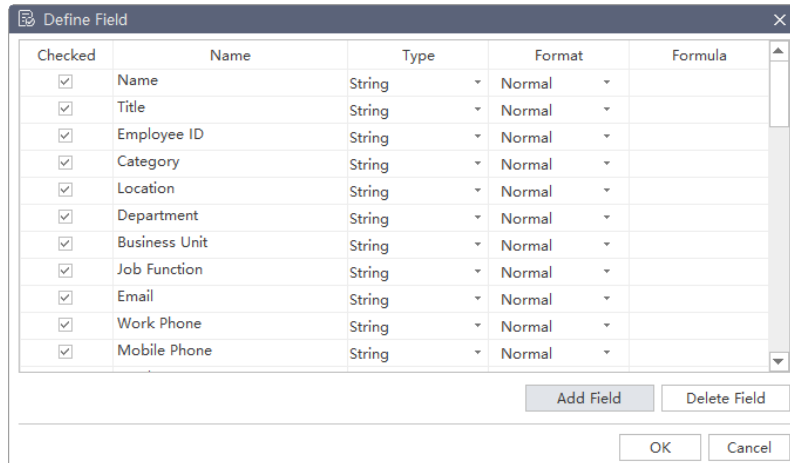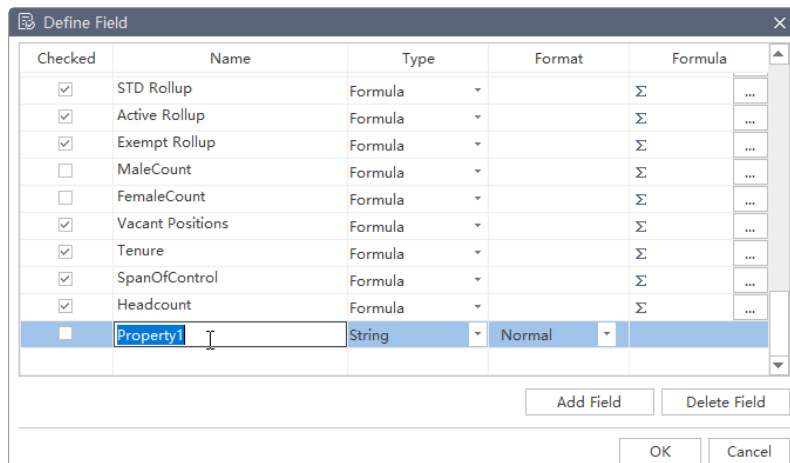
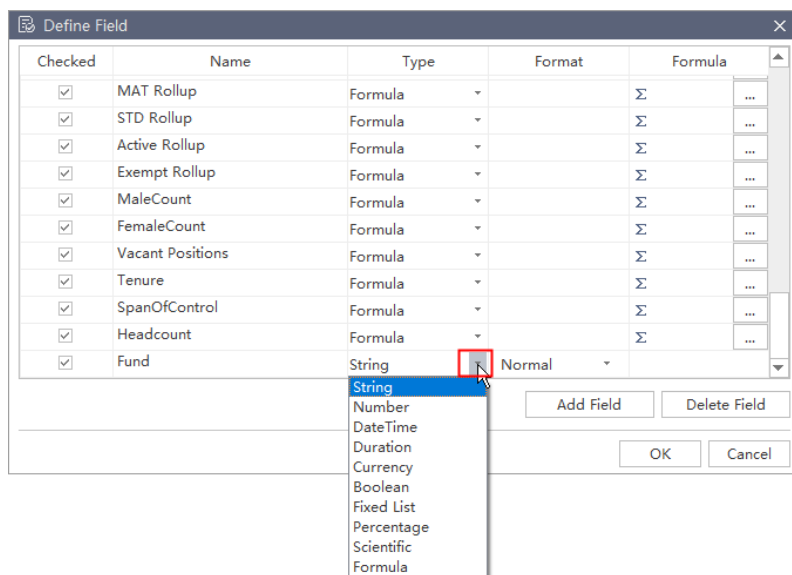The steps below instruct you to add customized field to the org chart:

1. Go to the **Views Options** on the **Right Side Bar**, click the **Define Field** button 📑. The Define Field window pops up.

| Checked	Name	Type	Format	Formula
☑	Name	String ▾	Normal ▾	
☑	Title	String ▾	Normal ▾	
☑	Employee ID	String ▾	Normal ▾	
☑	Category	String ▾	Normal ▾	
☑	Location	String ▾	Normal ▾	
☑	Department	String ▾	Normal ▾	
☑	Business Unit	String ▾	Normal ▾	
☑	Job Function	String ▾	Normal ▾	
☑	Email	String ▾	Normal ▾	
☑	Work Phone	String ▾	Normal ▾	
☑	Mobile Phone	String ▾	Normal ▾	

Add Field   Delete Field

OK   Cancel

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.

Checked	Name	Type	Format	Formula
☑	STD Rollup	Formula ▾		Σ ...
☑	Active Rollup	Formula ▾		Σ ...
☑	Exempt Rollup	Formula ▾		Σ ...
☐	MaleCount	Formula ▾		Σ ...
☐	FemaleCount	Formula ▾		Σ ...
☑	Vacant Positions	Formula ▾		Σ ...
☑	Tenure	Formula ▾		Σ ...
☑	SpanOfControl	Formula ▾		Σ ...
☑	Headcount	Formula ▾		Σ ...
☐	Property1	String ▾	Normal ▾	

Add Field   Delete Field

OK   Cancel

3. Click the triangle to choose the data type in the drop down menu.

After you have checked the newly added field, you can choose to display it or not in the **Display** operation of **Display Options**.
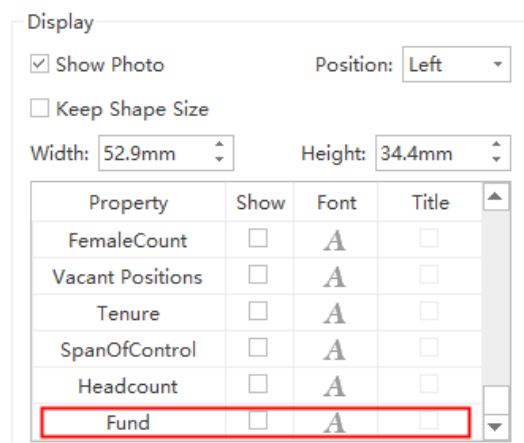
DISPLAY OPTIONS

The **Display Options** menu allows you to choose what data to display on your boxes of the current view. It also lets you set the box width/height, photo position, content layout and 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 operation allows you to quickly set the range and locations of the changes in your chart. With a single mouse click, you can affect everything from the data in individual box to the look of selected boxes, same level boxes, all colleagues boxes, all subordinate boxes and even the entire chart.

Display

The **Display** menu determines the visual appearance of the data in a box. It determines what is visible or not. To change this, check or uncheck the **Show** box on the right of each property.

Layout

The Layout option determines the layout and alignment of 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.



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.
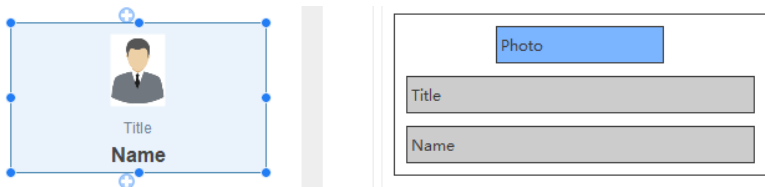
2. Drag and drop the bars in the **Layout** window to realign corresponding current data elements in the box. The red line reminds where you can drop the bar.

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 separation lines in between of two adjacent content sections.

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

2. Click the black line, and a corresponding border appears in the box.

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 two ways to change a box size.

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

2. Select a box. Click the **Display Option** on the right panel to input the **Width** and **Height** figures.

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 . 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 format (such as Excel) and convert them into captivating, easy to understand 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**.
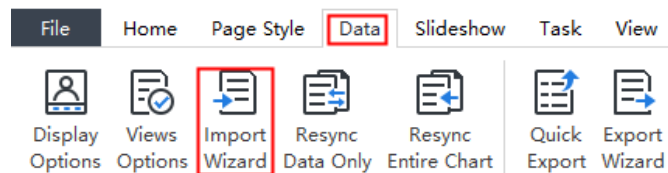
Tips:

    1. The data you intend to import must have correct reporting relationships for the import to succeed.

    2. Until the final (Finish) screen, you can move back and forth through the wizard to change your choices before you commit to the final import.

Import Wizard

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

Import Wizard - Select Source
1. This screen is used to choose which file to import (see below).
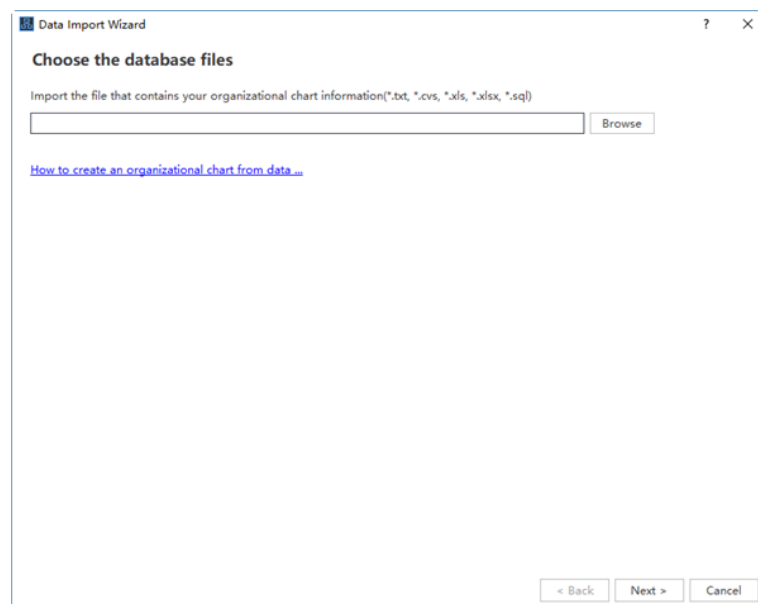
This screen is the first step for all supporting formats. To complete this page, choose one of the following options:

- 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.
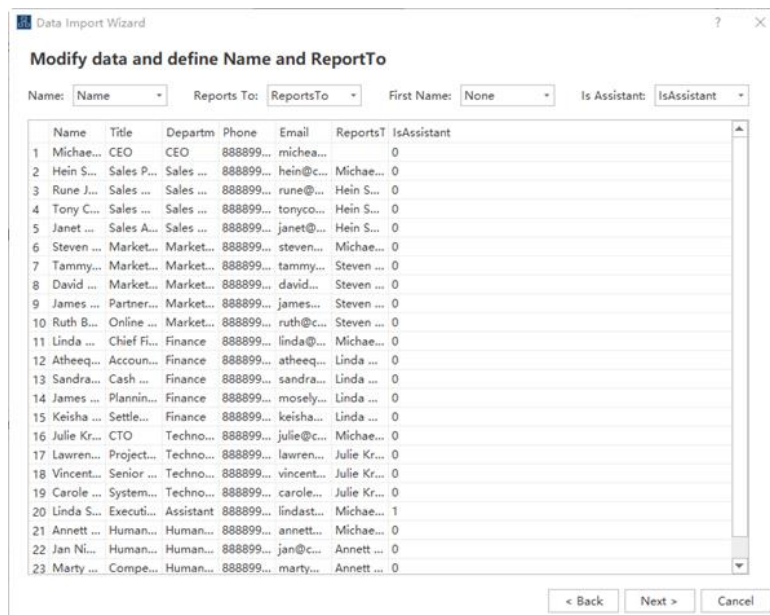
3. Set data field and display options

Display on shape determines what data field 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.
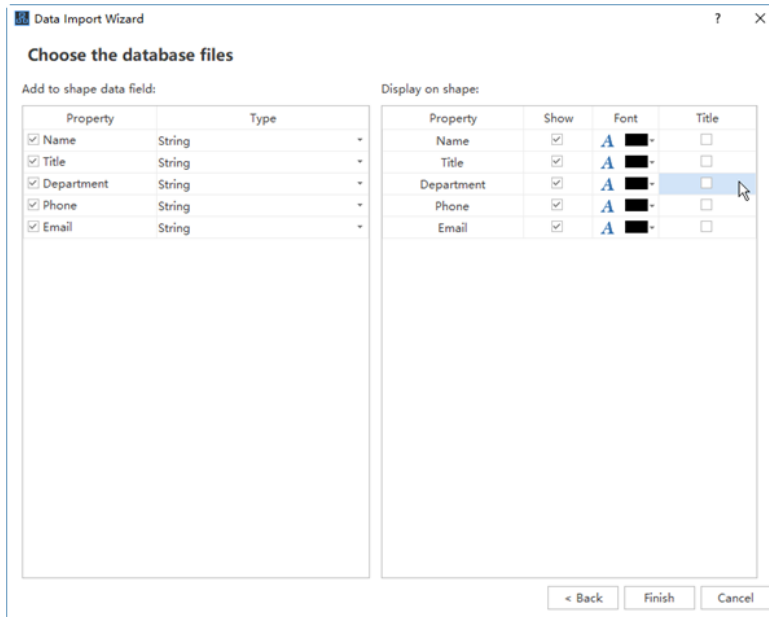
4. Click Finish to complete the wizard and return to the main work area.

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

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

Resync Data Only

(Shift + R)
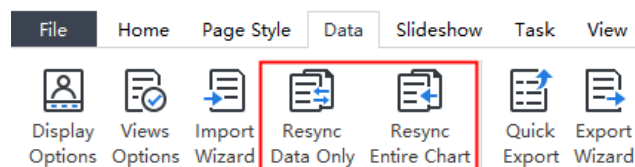
Resynchronize data of existing org chart. This option synchronizes data on boxes only. It won't change the relationship nor add or delete shapes.

Resync Entire Chart

(Ctrl + Shift + R)

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Resync Entire Chart gets the whole chart rebuilt according to the updated data source, including both data and the relationship.

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)
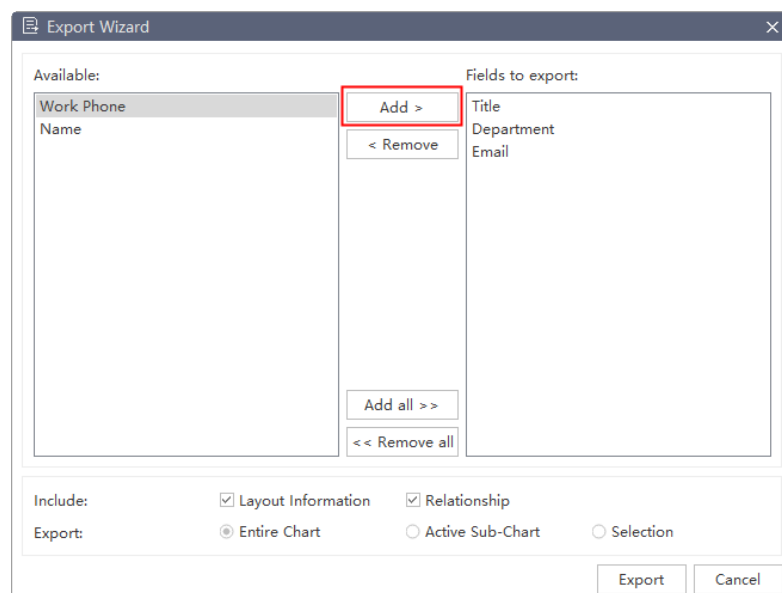
After you have selected the data fields you want to export and add them to the "Fields to export" box on the right of the window, click Export to choose a storage location.

CHAPTER 7 SLIDE SHOW

In **Slideshow** tab, you can create and manage a set of slides for a chart. This can help focus attention on a specific part of your chart or present the whole chart as slide show branch by branch.

Once you have created slides, you can display them in a slide show, print, or export these slides to Microsoft Power Point.

CREATE SLIDES FROM CHART AUTOMATICALLY

Edraw Org Charting software lets you create a set of slides based on chart branches with one button click. All slides are automatically generated from your chart branches one by one.

1. Go to **Slideshow** tab and click **Auto Create** button ⬚ .
2. The slides are created, and you can see thumbnails of the auto-created slides on the **Slide Preview** panel. The first slide is the top management hierarchy and the rest of the slides are the branches at lower levels.
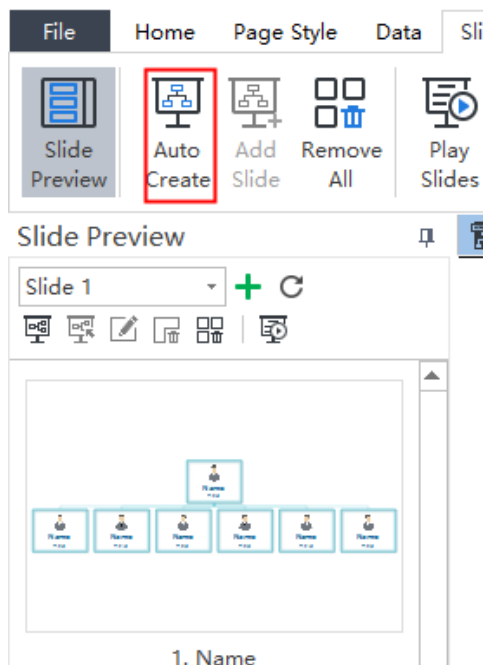
CREATE SLIDES MANUALLY

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.

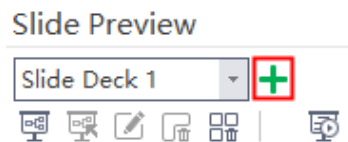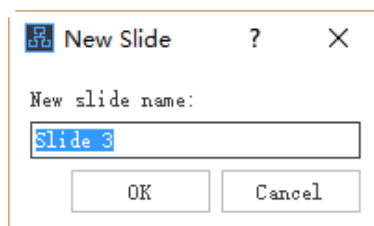3. Type the name of your New Slide Deck and click **OK.**
4. A new slide deck is created.

ADD SLIDE PAGES

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

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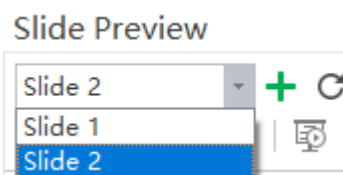
2. Go to your chart, select a branch or shape, and click the **Add Slide** button on **Slideshow** tab.
3. The branch or shape is successfully added as a slide page. You can see it on the Slide Preview panel.

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 **Slideshow** tab or **Slide Preview** panel and type your preferred name.

2. Double click the slide page name and edit the name directly.
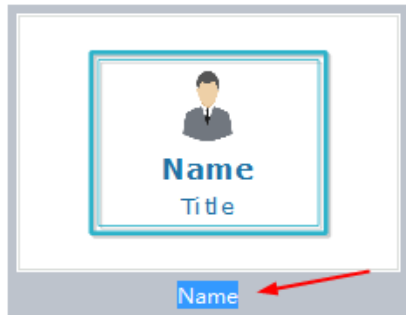
3. Right click a slide in the **Slide Preview** panel and click **Rename** in the context menu, you will see its current name turn blue so that you can type your preferred name.

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 slide thumbnail in the **Slide Preview** panel, and you can preview the full slide page in the main window. Close the full slide page preview by clicking the close button on the top.
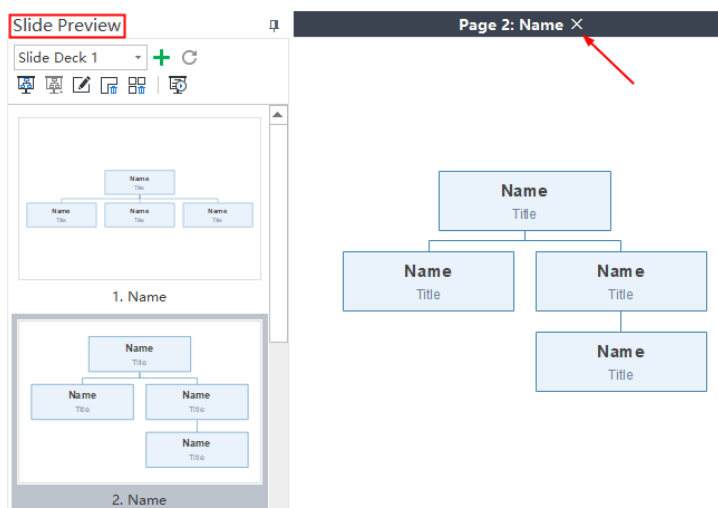
REORDER SLIDE PAGES

Right-click on a slide preview thumbnail, and click **Move Up** or **Move Down**.
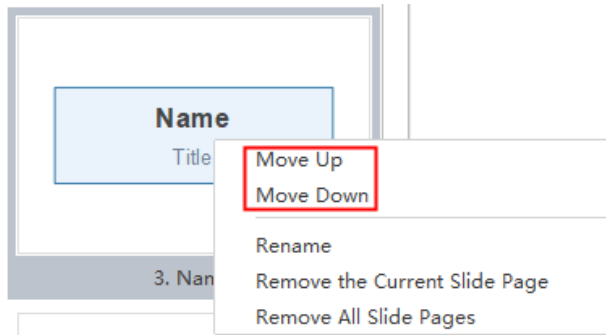
DELETE SLIDE PAGES

To delete a slide page, you can:

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

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

2. Right click the slide in the Slide Preview panel.

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

TRAVERSE BOXES OR BRANCHES IN FULL SCREEN MODE

(F5, Shift + F5)

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

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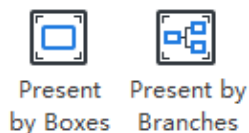
2. You can also click the **Full Screen** icon on **Slideshow** tab to view your document in full screen mode.

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 the Slides

There are three 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 to the lower part of the canvas, a tool bar covering 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 from Slide Show Mode

You can end the slide show by pressing the **Esc** key on your keyboard, or click the **Close** button on the slide show tool bar.

EXPORT SLIDES TO MICROSOFT POWERPOINT

You can export the slide show to Microsoft PowerPoint format. Simply click **Export Slides to PPT** button .
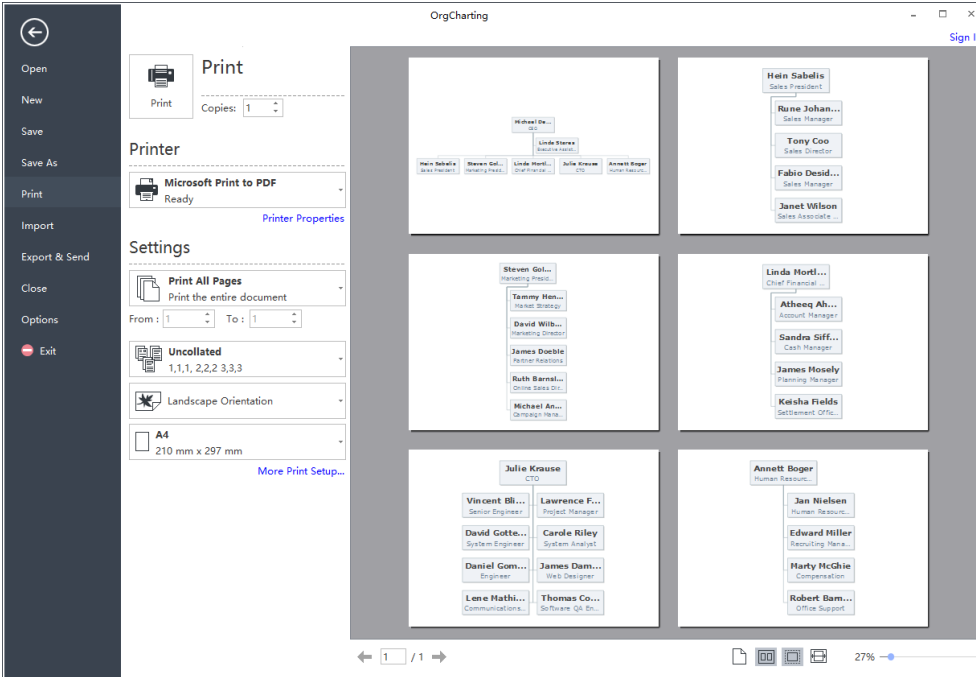
Tips:

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

PRINT SLIDES

1. Click the **Print Slides** button on **Slideshow** tab, or on the **Slide Preview** panel, then you can see the print setting and preview interface.

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

CHAPTER 8 WORKING ON 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.

Open the Gantt Chart View Panel

1. Click the **Task** tab on the Ribbon.

2. Click the **Gant Chart** button to display based on a Gantt Chart.

SET GANTT CHART OPTIONS

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

1. Click the **Task** tab in the menu bar and then click the **Gant Chart Option** button.

2. You can set the following options for your Gantt chart.

   a. Select a date format in the drop-drag **Date Format** menu.

   b. Tick a working day from Monday to Sunday.

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

   d. Set the **Duration** and the **Duration Unit** in the corresponding drop-drag menu.

   e. Set the **Start Date/Time** and the **Finish Date/Time** in the corresponding drop-drag menu.

MODIFY TASK INFO IN THE 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.
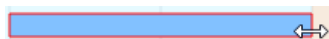
3. **Change Task Complete %**

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.
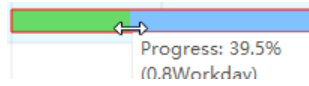
4. **Build a Task Dependency**

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

5. **Change the Date Unit Size**

Click the "+" and "-" button on the top right corner to change the date unit size.
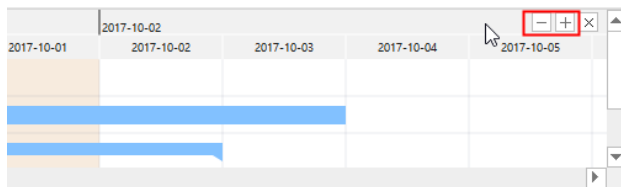
SET MILESTONE

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 and replace command helps you check the specific word within the whole org chart including employee name, titles, note, comment, department, salaries and so on.

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

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

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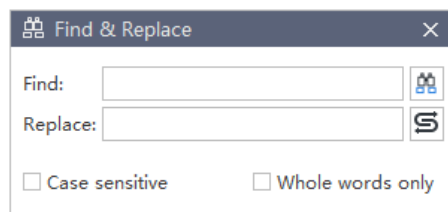
Tips:

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

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

3. Choose one of the suggestions 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, and repeat 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.
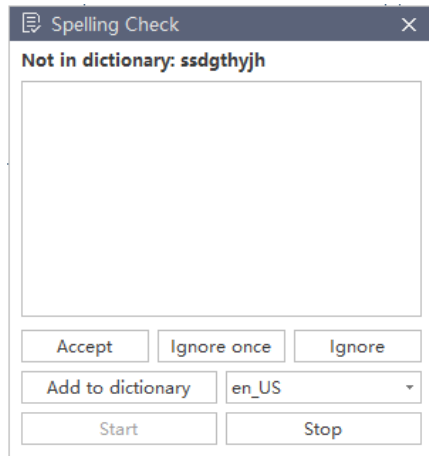
Tips:

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 a dictionary before start.
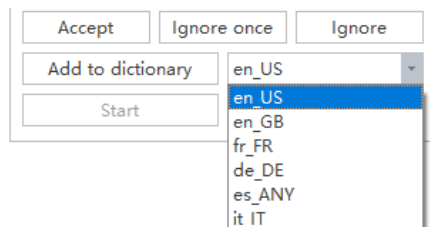
UNDO AND REDO

(Ctrl+Z / Ctrl+Y)

OrgCharting provides undo and redo actions for users.

Undo (Ctrl + Z)

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

Redo Typing (Ctrl + Y)

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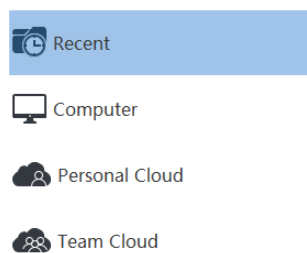
2. Drag an org chart and drop it on the top of the program.

SAVE AN ORG CHART

(Ctrl + S, Ctrl + Shift + S)

You can save your org chart using **Save** or **Save As** commands.

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

2. Enter a name and choose a location to save your file. Location can be the local disk, personal cloud, or team cloud.
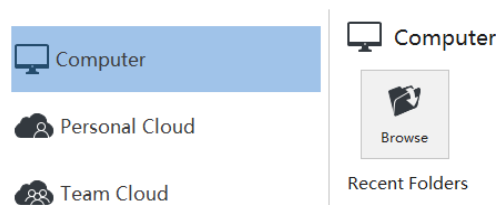
FIND AND RECOVER AN AUTO SAVED FILE

OrgCharting creates 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 auto save. The default setting is every 10 minutes.

Set Auto-Save Time Period

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

2. From the **Save auto recover** option, input a time period.
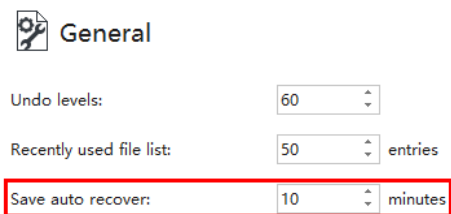
Find Auto Saved File

1. Go to the **View** tab, click the **File Recovery** button.

2. Find your auto saved filesfrom the file recovery list.
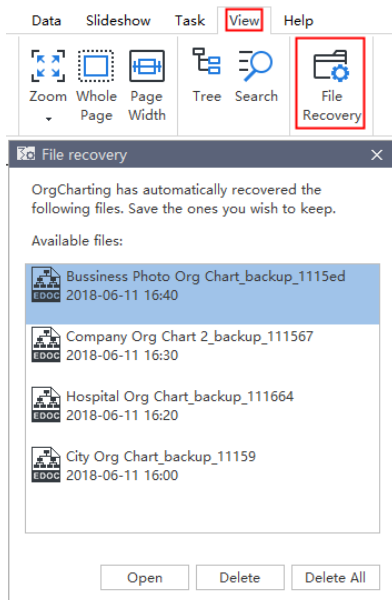
PRINT AN ORG CHART

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

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.
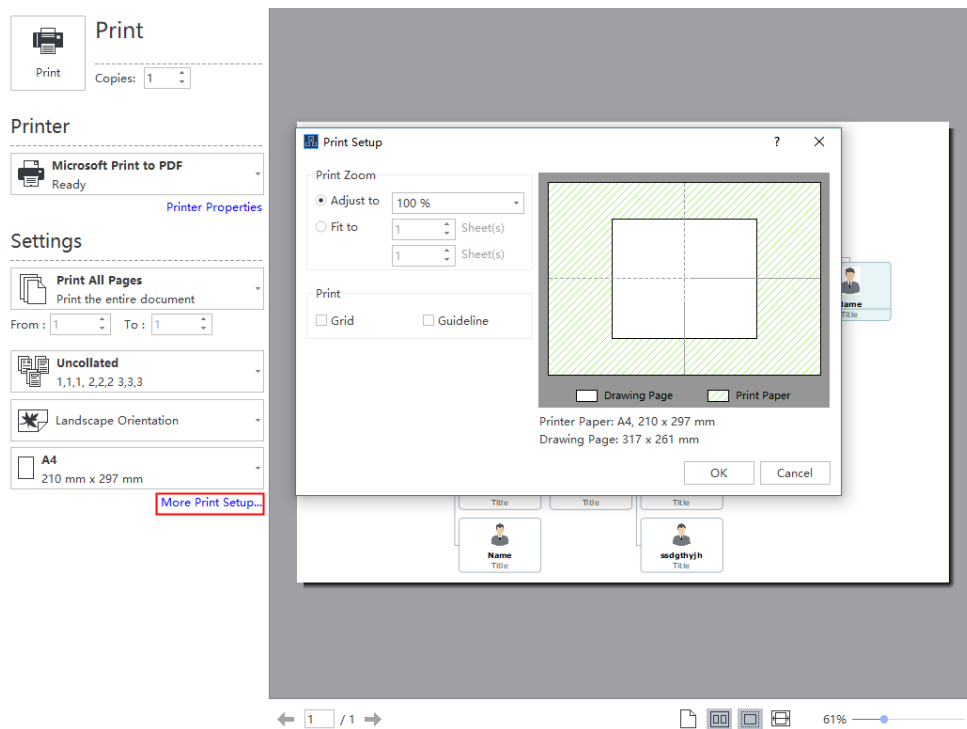
Adjust to

Reduces or enlarges the drawing page to a specified proportion of actual size for printing. If the drawing page is larger than the size of one piece of paper, the diagram will be printed onto multiple pieces of paper.

Fit to (sheets across by sheets down)

Fits each drawing in the print job on the specified number of sheets across and down. Depending on the number of pages and the margins you specify, the drawing will be enlarged or reduced. If the pages across and down are not proportional to the drawing's dimensions, only those sheets maintaining the drawing's proportions will be used.

EXPORT AN ORG CHART

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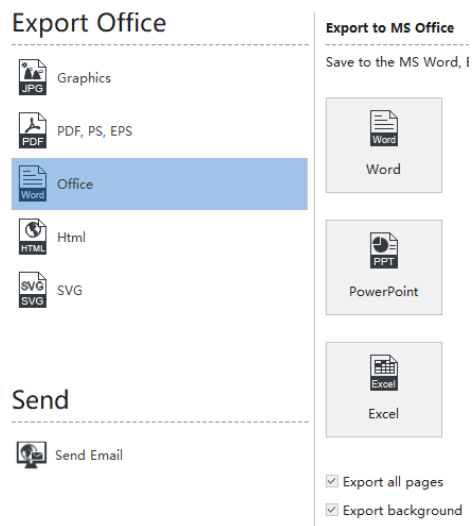
Export to Graphic Format

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 Editable PDF

1. Go to the **File** tab.

2. Click **Export & Send**.

3. Click **PDF**, **PS**, **EPS** option ![PDF].

4. Choose **PDF Vector Format** to export org charts to editable PDF files.

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 ![Word].

4. Choose **Word**, **PowerPoint**, or **Excel**.

Export to Html

1. Go to the **File** tab.

2. Click **Export & Send**.

3. Click **Html** button ![HTML].

Export to SVG Format

1. Go to the **File** tab.

2. Click **Export & Send**.

3. Click the **SVG** option ![SVG].

SHARE AN ORG CHART

Once you have drawn an org chart, you can share it with your colleagues and friends based on links. Sharing org charts links is easy for people who have not installed OrgCharting to view anywhere and anytime.

Sign Up an OrgCharting Account

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

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** content which synchronizes with the org chart in the work area. Before opening the **Tree Outline View**, you need to choose a view you want to display in **Views** option first.

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 an item and type in texts to edit the Data Field content. You can also move a box or add Manager, Subordinate, Colleague and Assistant to a box in **Tree Outline View**.
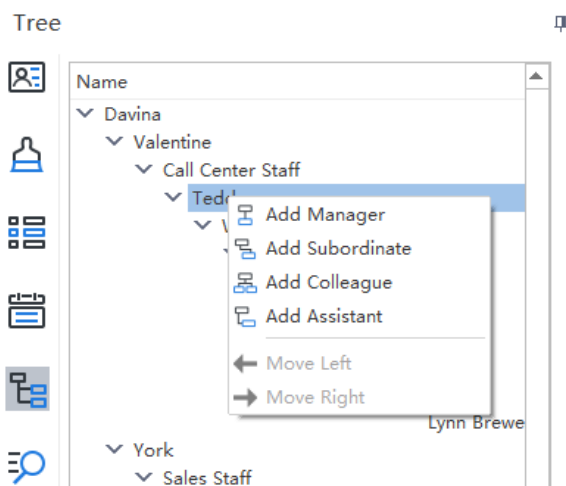
3. If you need to close the Tree Outline View, click the **Hide Panel** button on the top right of the panel.

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.
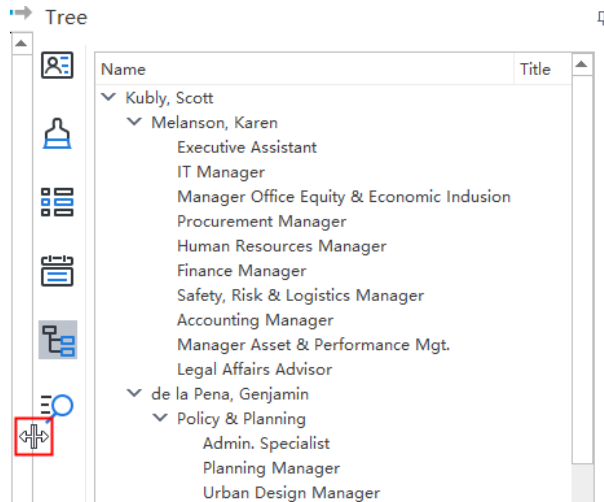
RULERS, GRIDLINES, ACTION BUTTON AND STATUS BAR

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.
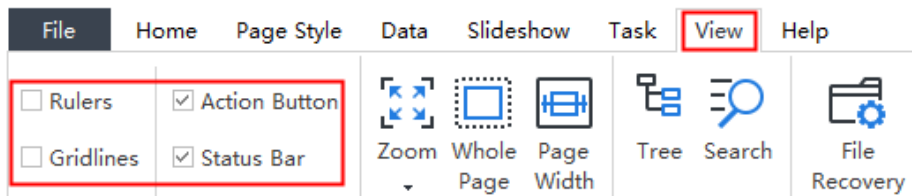
Rulers

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

Gridlines

The grid helps to position shape more precisely.

Change Grid Spacing and Subdivisions

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.
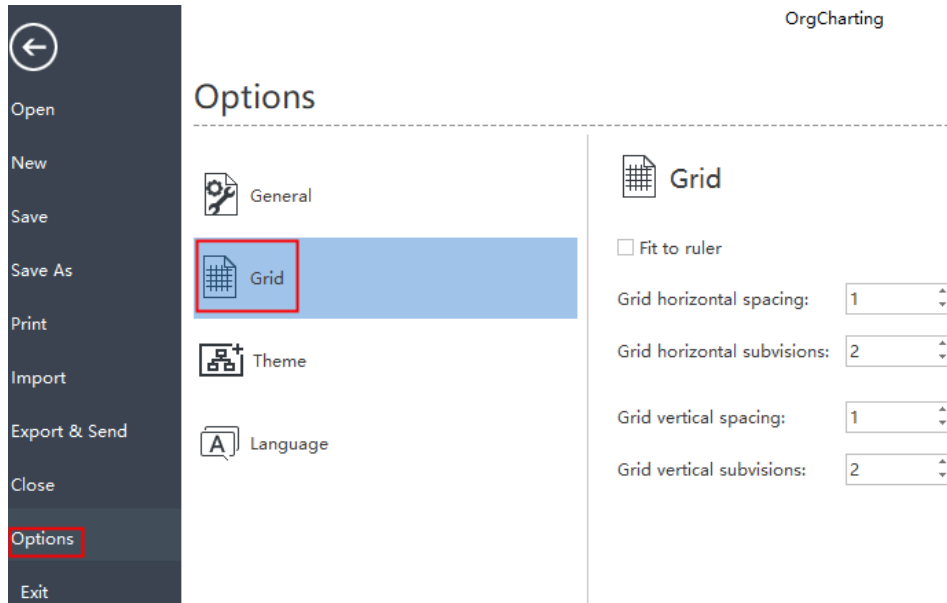
Action Button

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

The ⊕ is used to add Manager, Colleague and Subordinate.

The ◓ ◒ ◑ ◐ four buttons are used to collapse and e4xpand the chart to different directions.
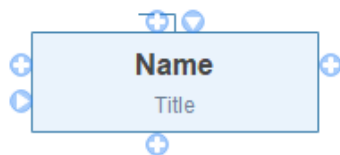
If you hide the Action Button, the box looks as the appearance below.

Status Bar

Status Bar is a horizontal bar at the bottom of the window, showing information about the program and the document being edited.
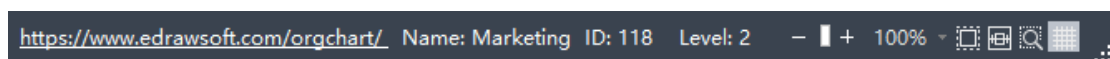
COLLAPSE AND EXPAND BOXES

You can collapse and expand branches of individual boxes interactively by using the ⬢ and ⬢ icons that appear on the right of each box that has subordinates (out of the box).
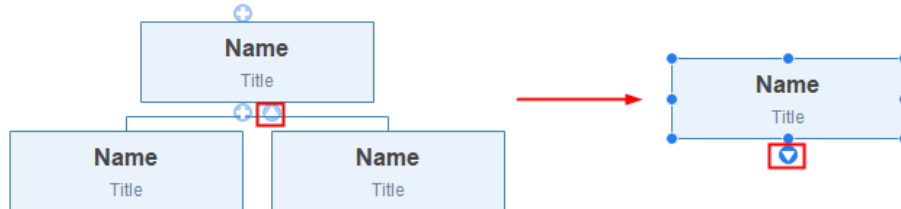
ZOOM

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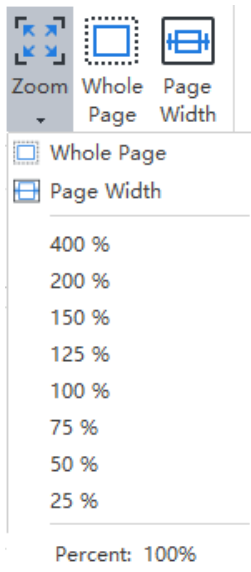
2. On the **Status Bar**, drag the Zoom slider.

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, displays on screen.

Options are:
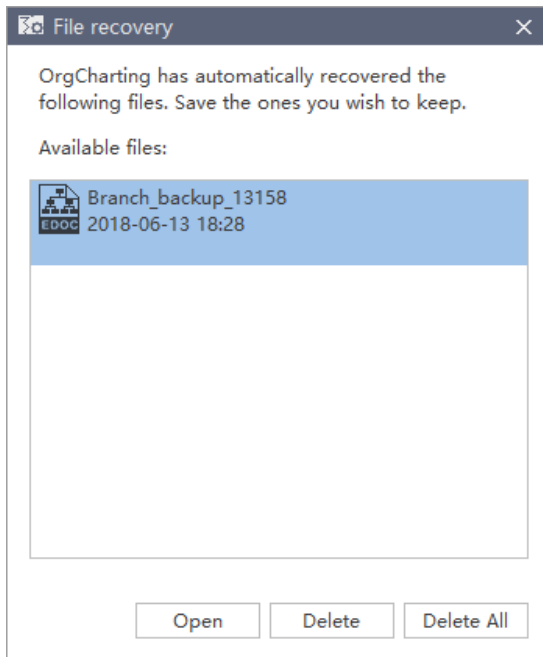
1. Click **Whole Page** button in the **View** tab.

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 find 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.
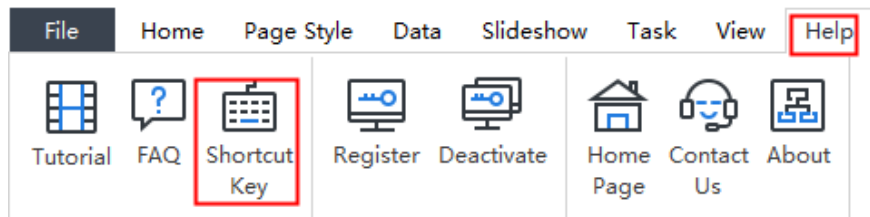
Function	Shortcuts
Documents	
Create a new chart	Ctrl + N
Open a chart	Ctrl + O
Save the current chart	Ctrl + S
Save all charts	Ctrl + Shift + S
Close current chart	Ctrl + W
Close all charts	Ctrl + Shift + W
Print the current chart	Ctrl + P
Navigating	
Select box (above, below, left and right)	Arrow keys
Select next box / previous box	Ctrl / 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