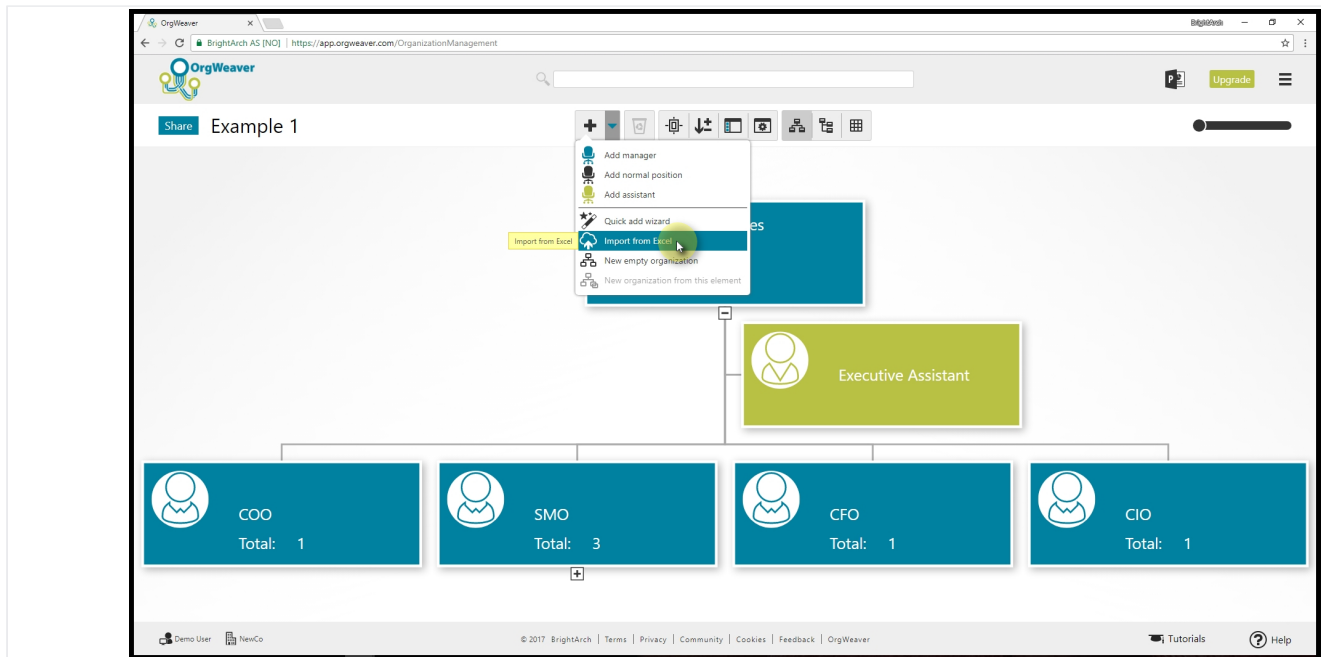


Contact support@orgweaver.com

Getting Started Guide - OrgWeaver

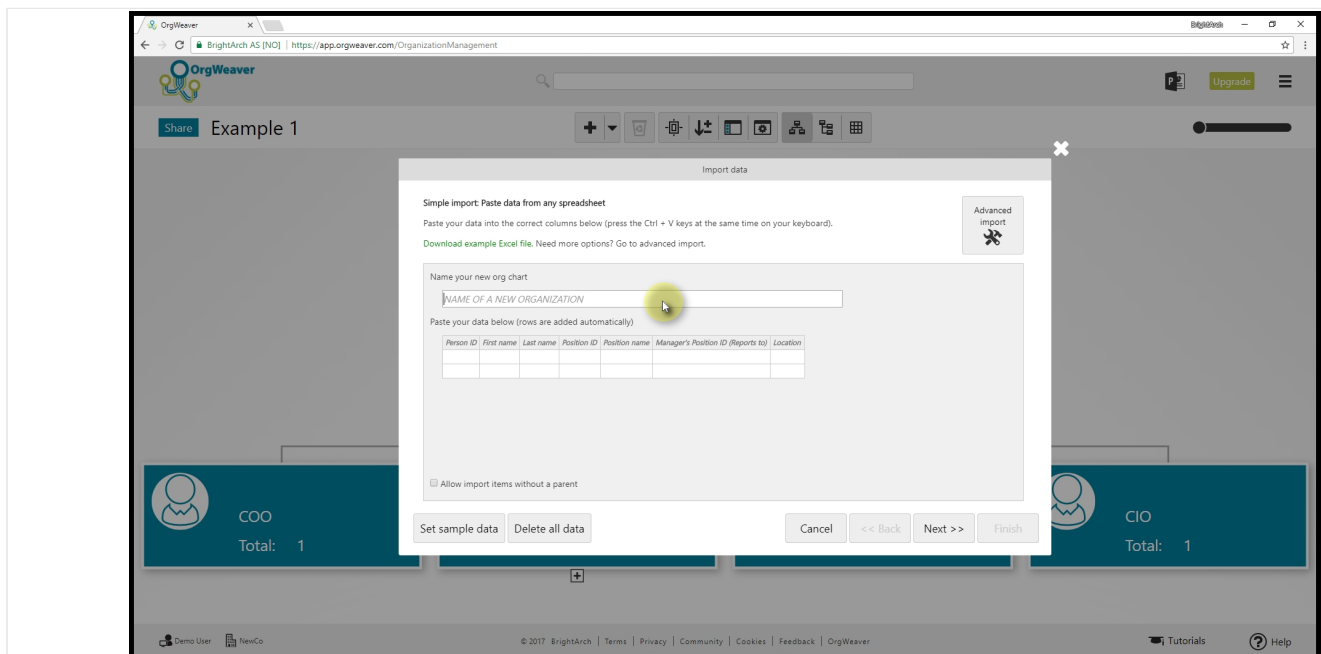
Add org chart data



Upload data from a spreadsheet

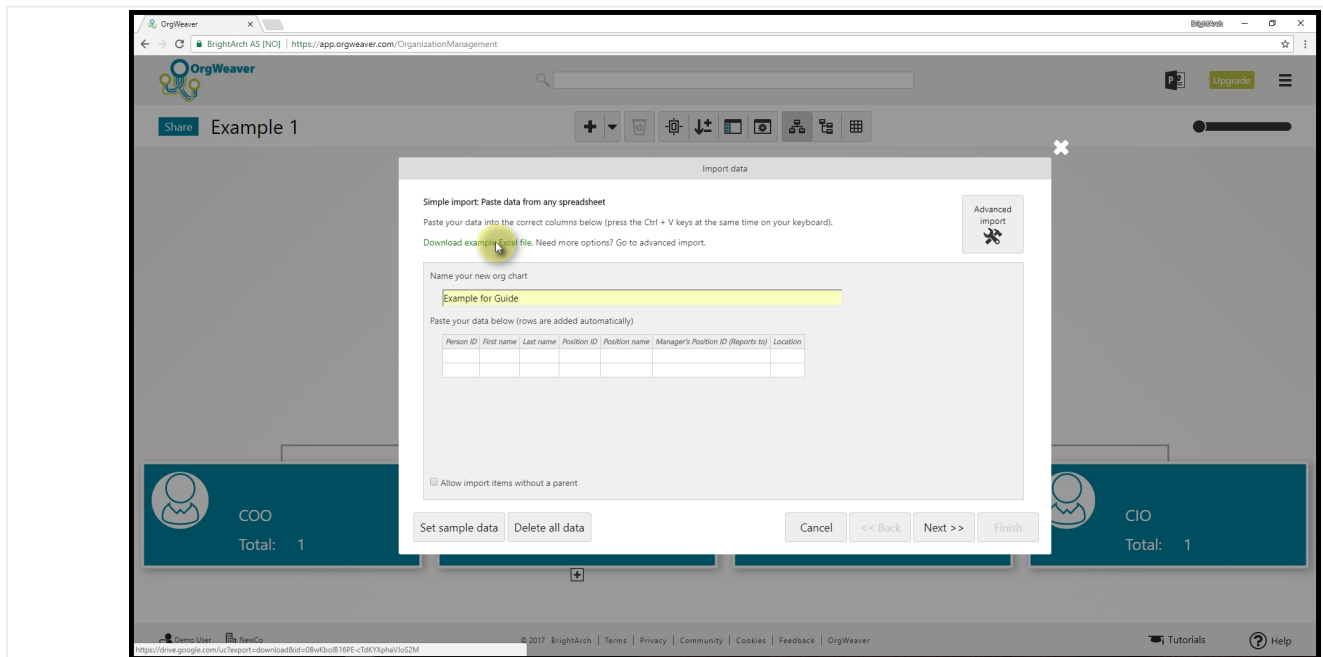
Click on the dropdown menu of the "Add" button in the top toolbar. Choose "Import from Excel".

If you do not have any data in Excel, you can create from scratch by selecting "New empty organization" and then adding positions one by one (or use the "Quick Add Wizard" to add multiple positions easily).



Name your new org chart

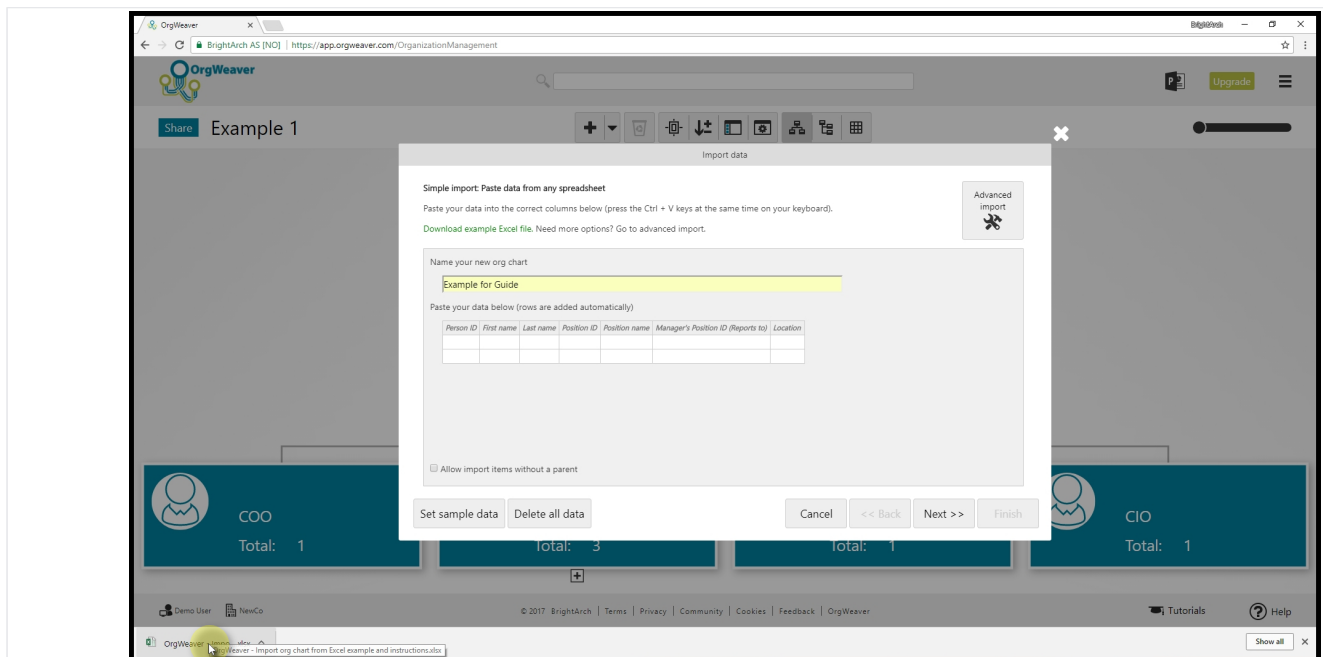
Click the empty field and start typing the name



Download sample Excel file

Click the green link to download an example Excel file. Structure the data you have from your HR system, Payroll system, or other system to fit the exact layout of the example file.

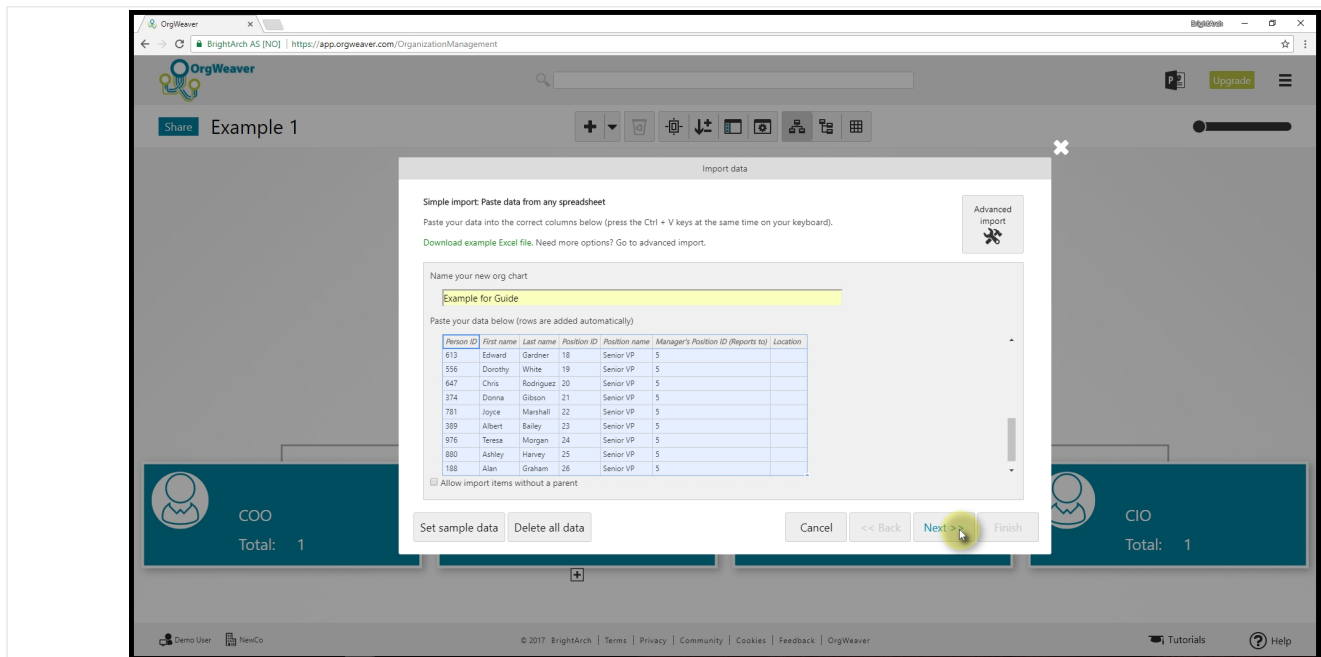
If you do not have Person ID or Position ID in your data, you can create any sequence of numbers you want (1,2,3, etc.). Person IDs and Position IDs could be the exact same number (which makes things easier to get started quickly).



Open Excel example file

Click on "OrgWeaver - Import org chart from Excel example and instructions.xlsx" button that was downloaded.

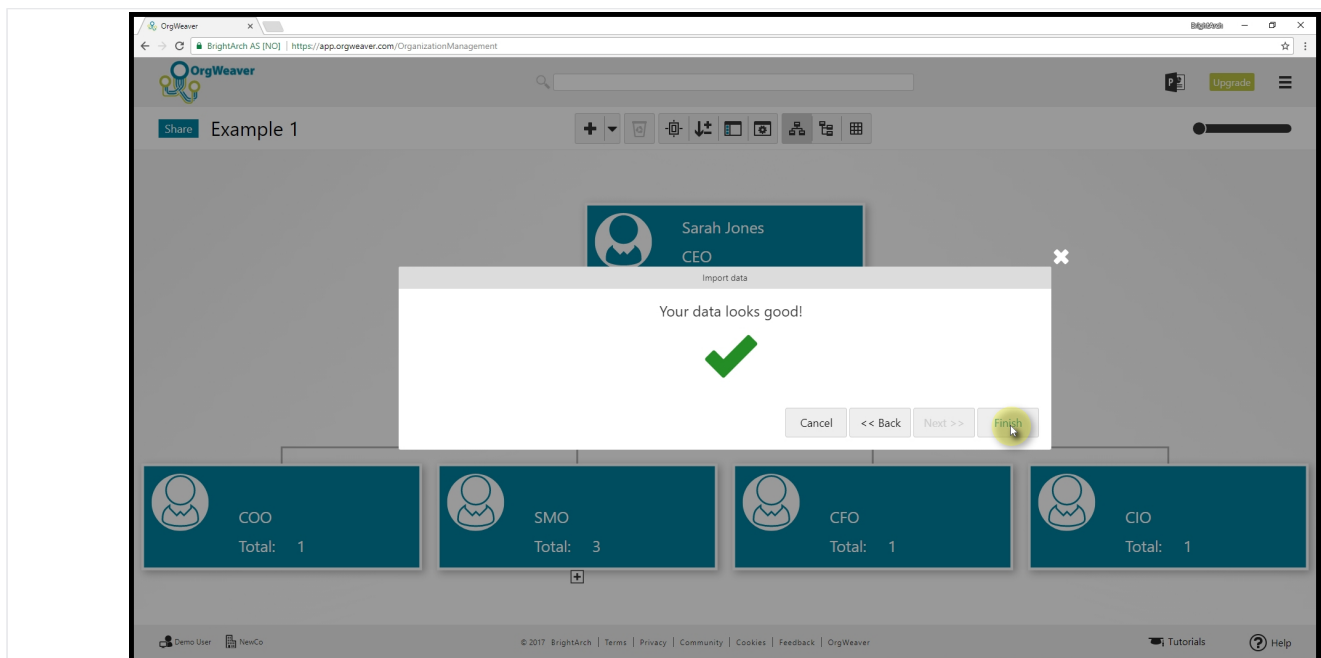
This screenshot was taken in Chrome, so your browser (Firefox, IE, Opera, etc.) could download files differently.



Validate your data is OK

Click "Next" and OrgWeaver will check that your data makes sense.

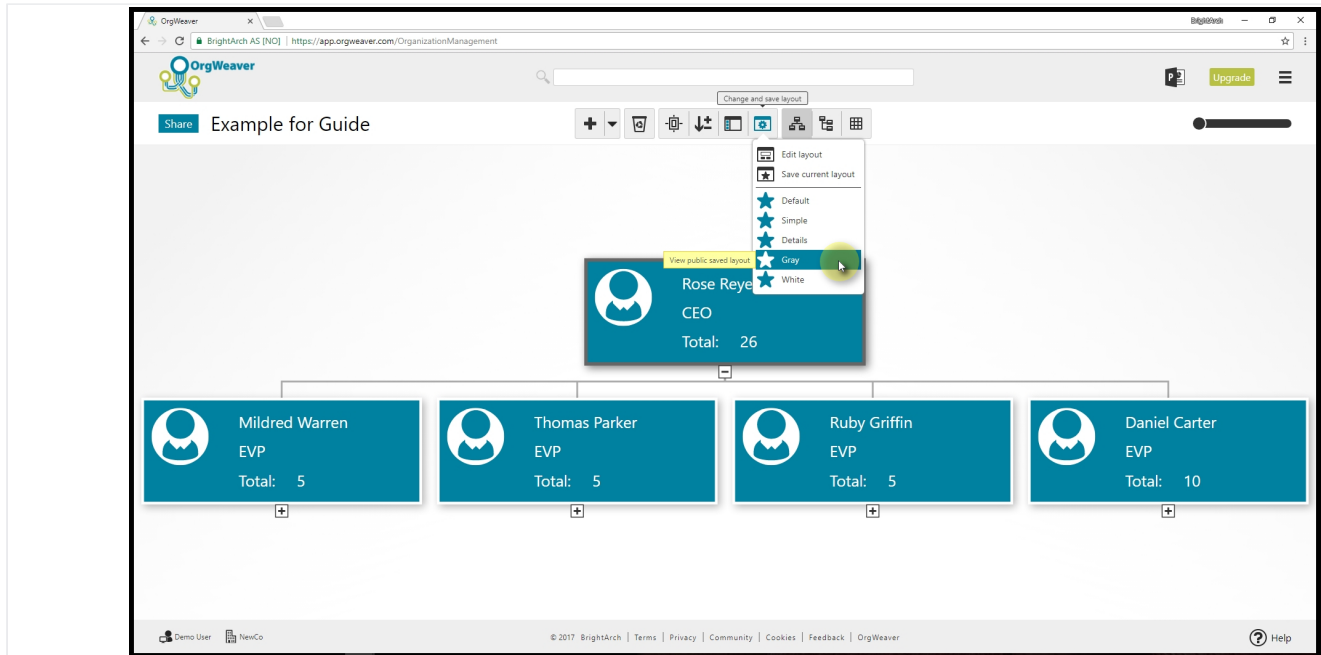
If data has problems, you'll get a message describing what needs to be fixed.



Complete upload of data

Click on "Finish" and wait while OrgWeaver creates all of your org chart boxes and lines automatically.

Change org chart view



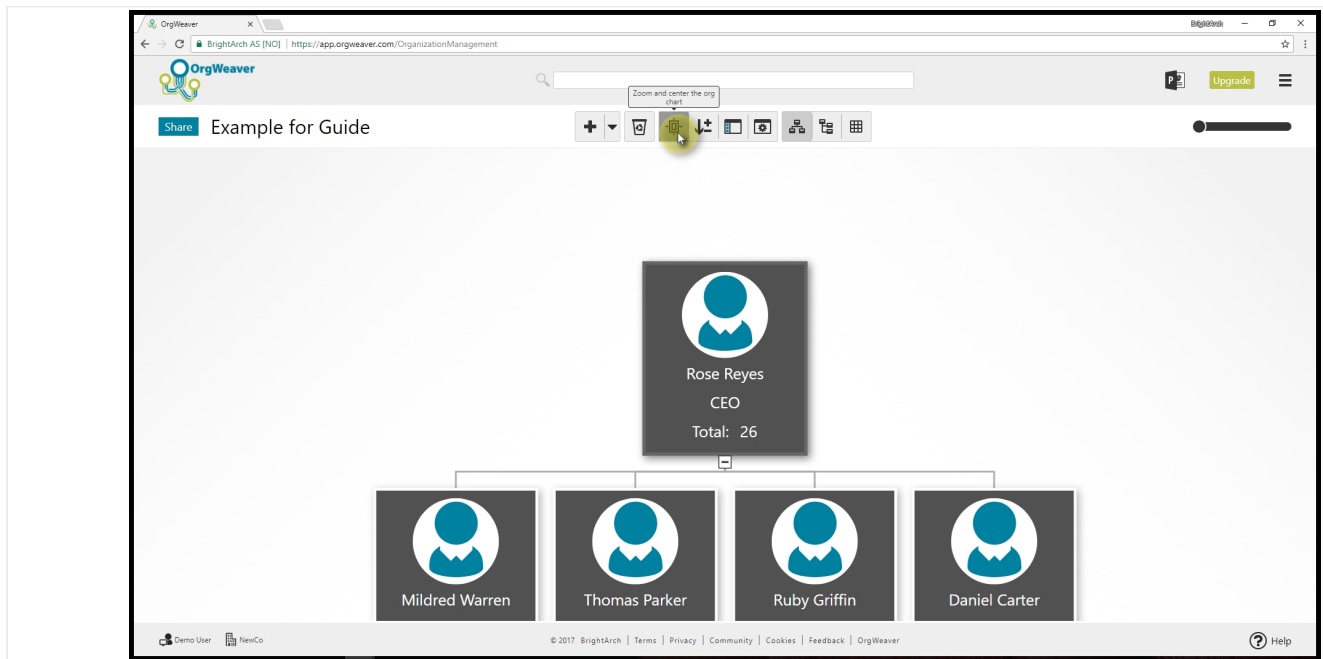
View different org chart styles

Hover your mouse over the "Change and save layout" button in the top toolbar. Select a starred view of the org chart to see one of the pre-saved layouts.

To change the layout, click "Edit layout".

To save the layout you see on your screen, click "Save current layout".

You have control over box size, font size, picture placement, information included, and theme colors.

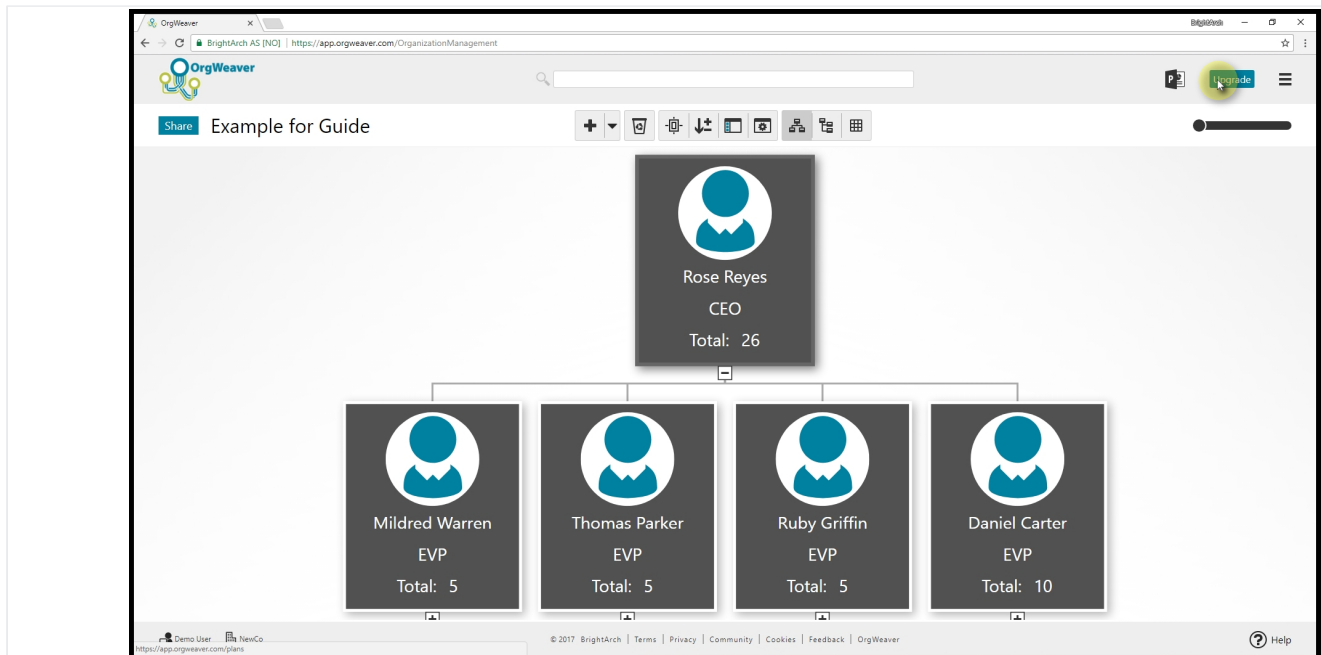


Navigate your org chart

Click on "Zoom and Center" in the top toolbar to see all of the open levels at once.

Or use your mouse to grab any whitespace next to the org chart to manually move the org chart. Use your mouse scroll button (or pinch and zoom on a mouse pad) to manually zoom in and out.

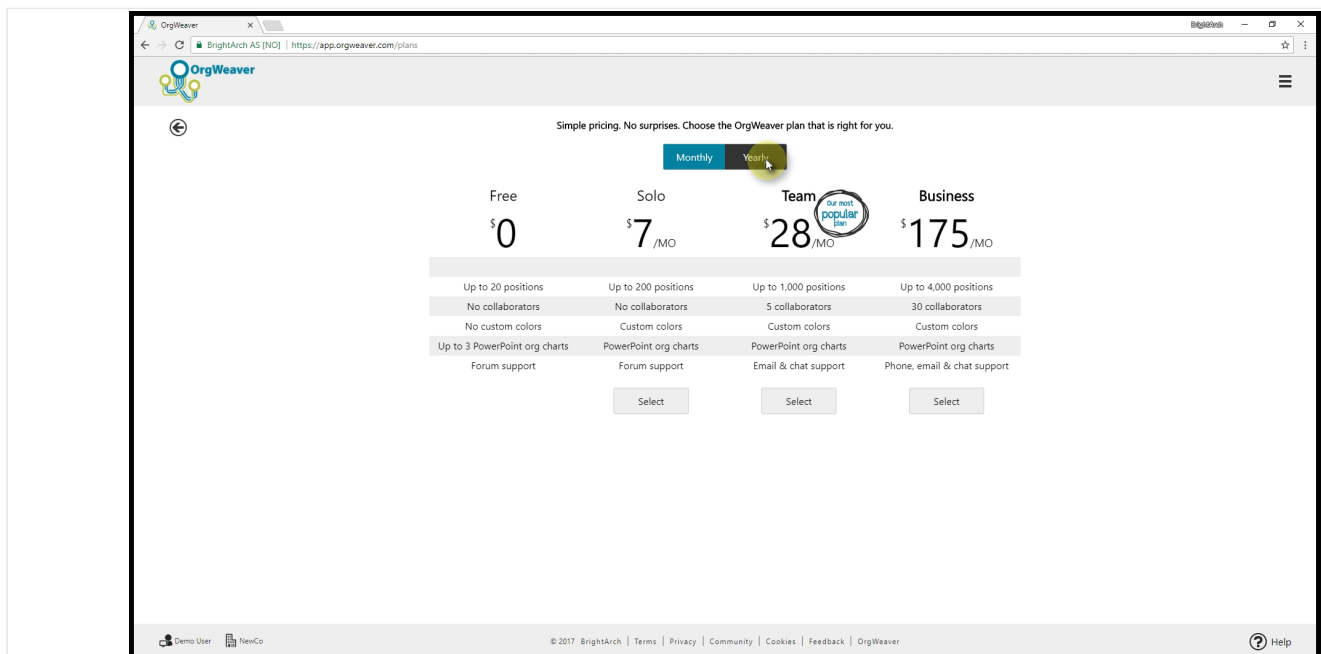
Upgrade your subscription



Upgrade when you're ready

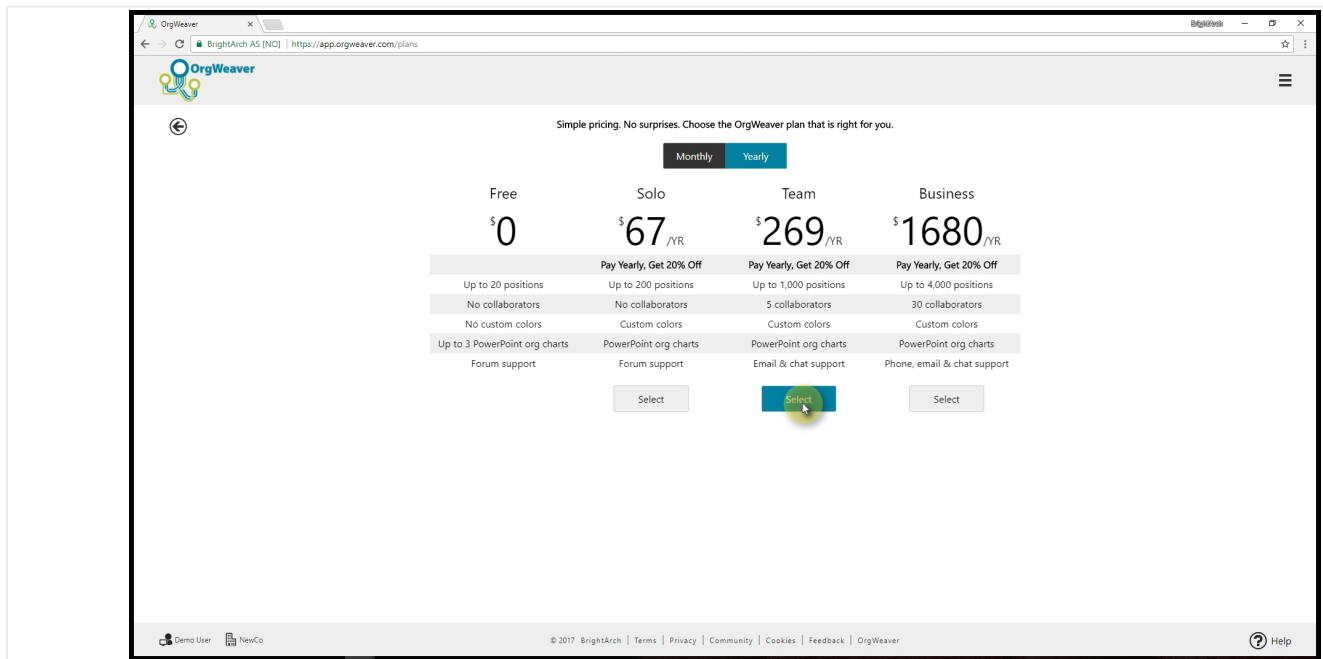
If you're on a free plan, click the "Upgrade" button in the top right to choose a paid plan.

If you already have a paid plan, click the top right menu > Account > Subscription > Manage Subscription to change your paid plan or view invoices.



Select a Yearly plan for a discount

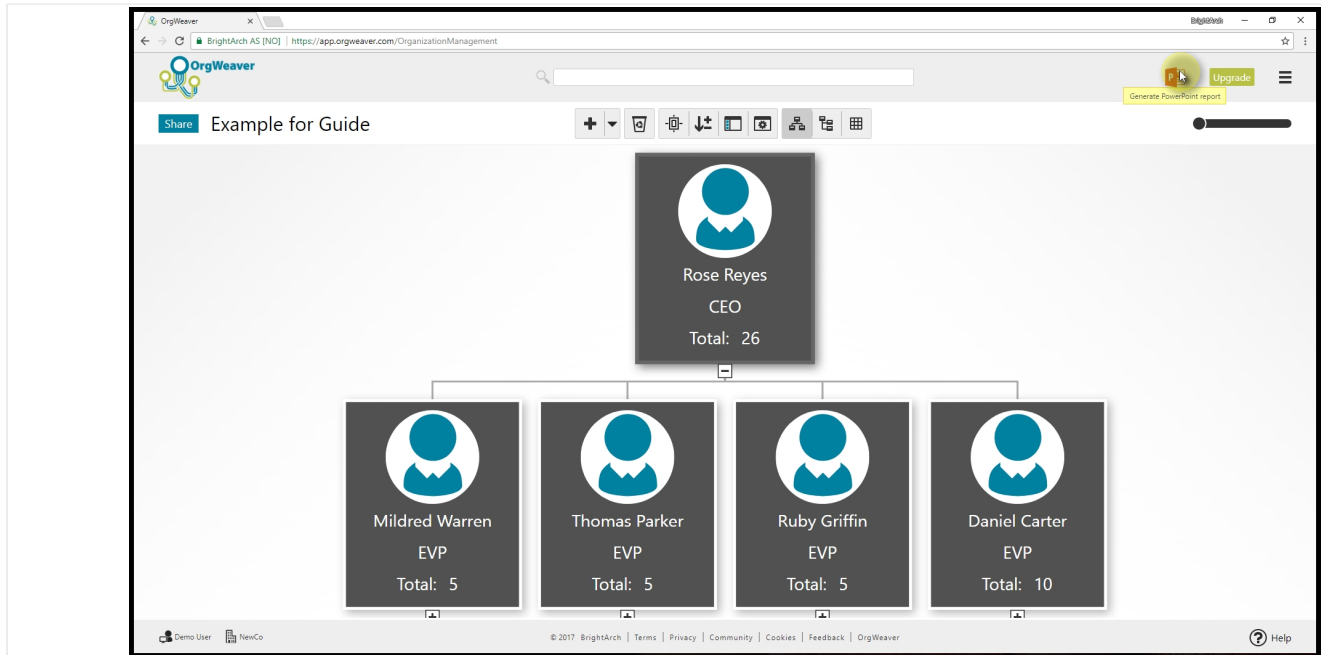
Click on "Yearly" button to see the discount available if you pay annually.



Select your preferred plan

Click on the "Select" button to enter your billing details

Download an org chart



Export to PowerPoint or PDF

Click on the PowerPoint icon in the top right

Generate a report

The org chart report can include any hierarchical descendants of the selected org unit / position.

How many organizational levels on each slide?
2 (all)

How many organizational levels in total?
2 (all)

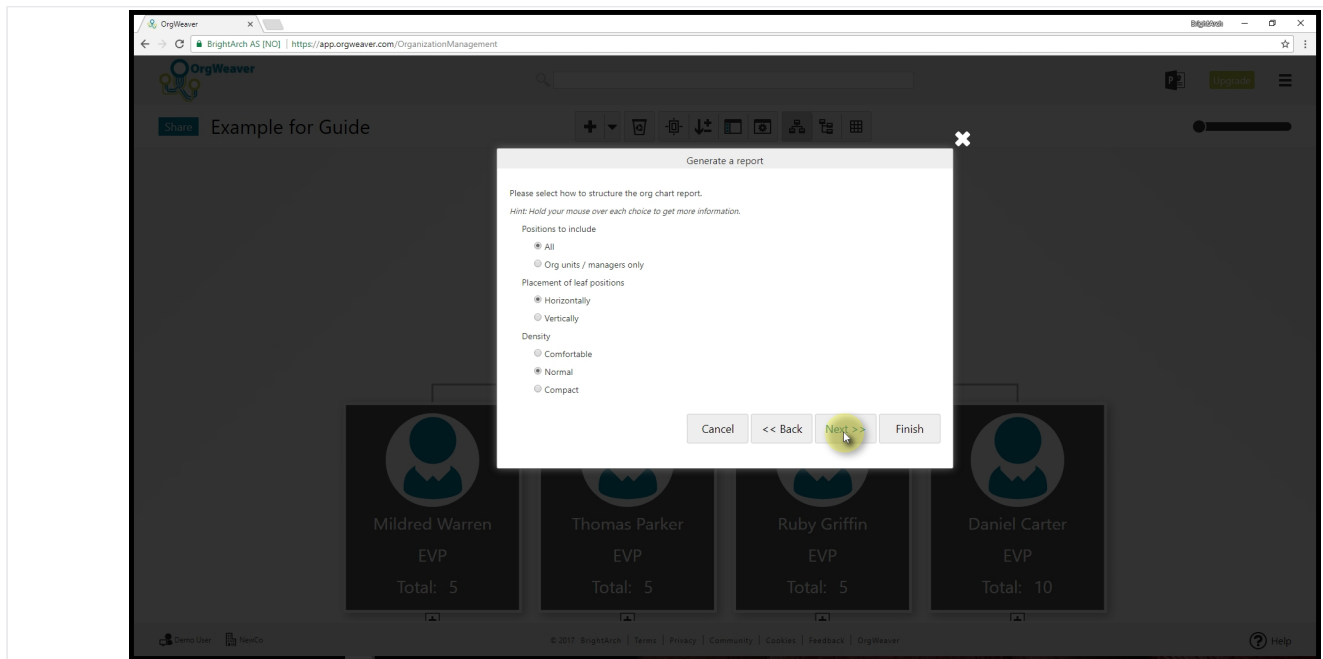
Number of slides in report (in addition to front page):
1

Cancel << Back Next >> Finish

Choose how to split your org across slides

Choose 2 or 3 levels to show on each slide. With limited space on each slide, it's important to split the org chart across multiple slides.

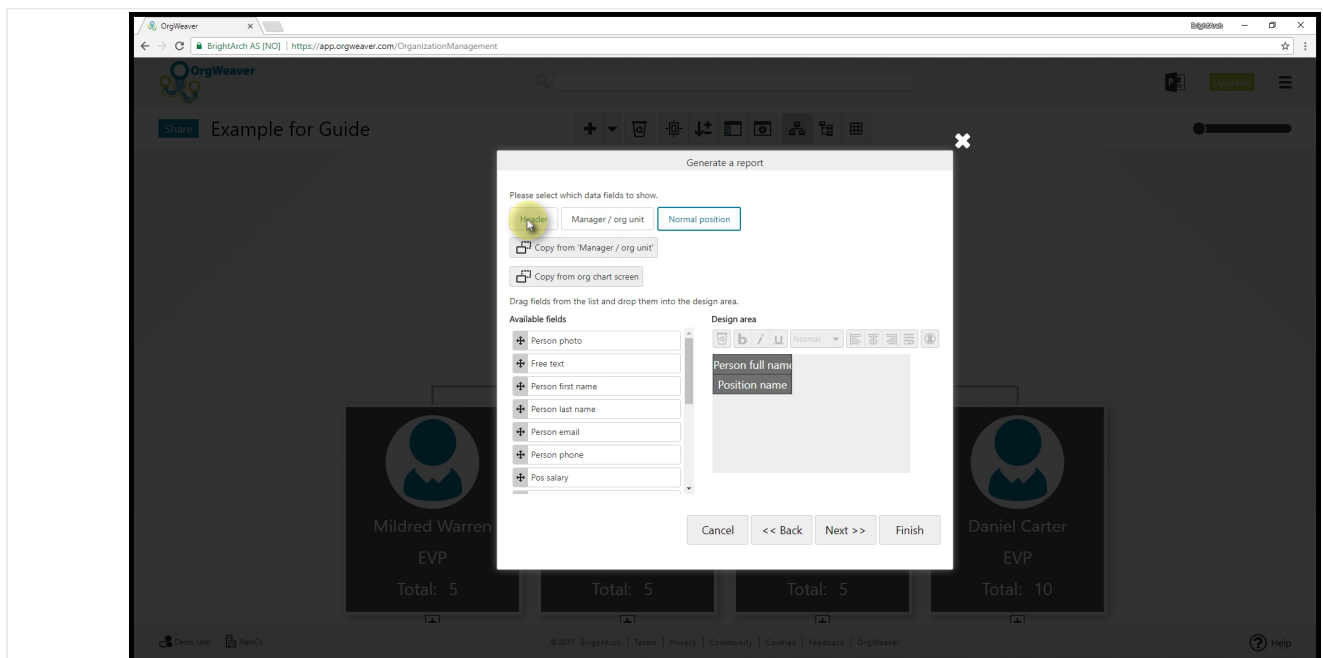
Click "Next" button.



More options

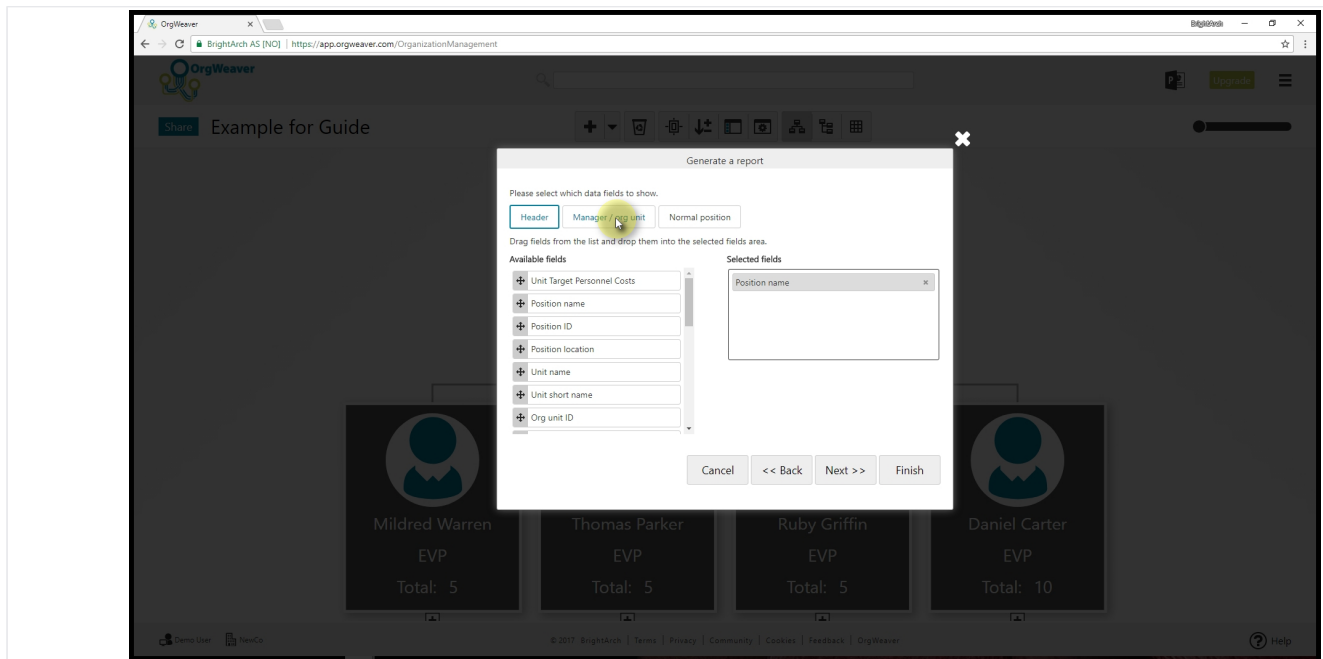
The default settings usually work well, but you can change your options.

Click "Next" button



Design slide Header

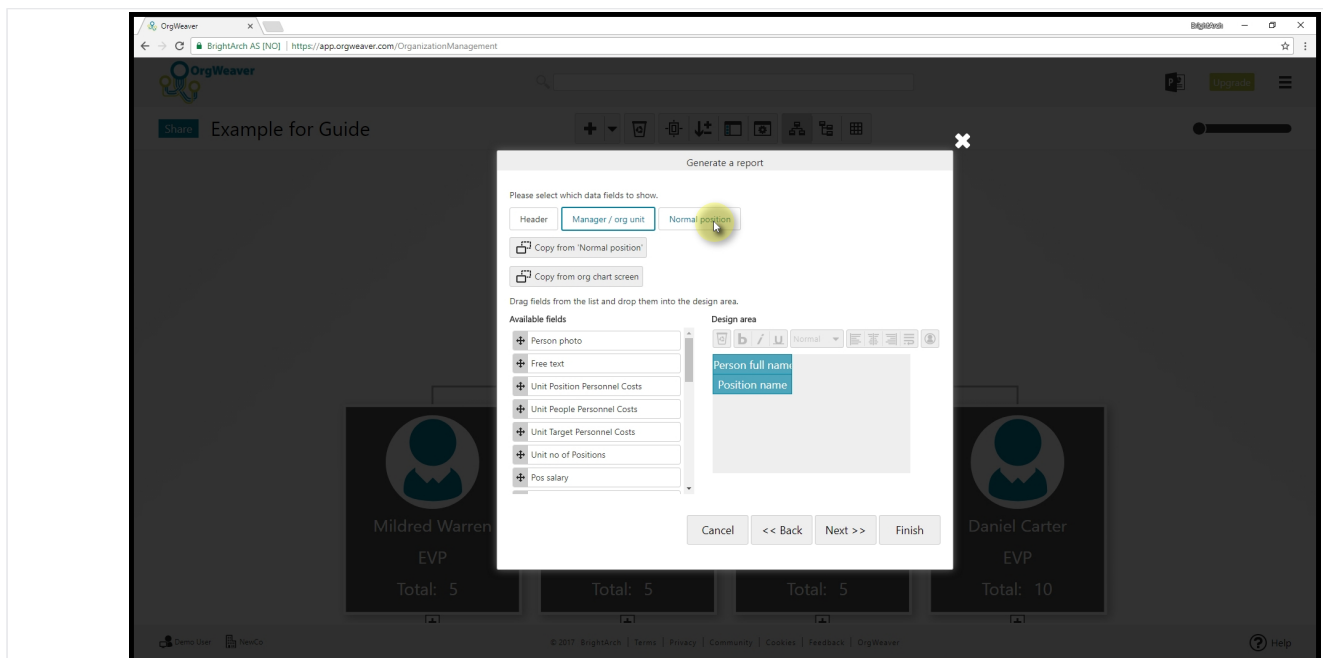
Click on "Header" button to choose what information to show at the top of each slide.



Design Manager boxes

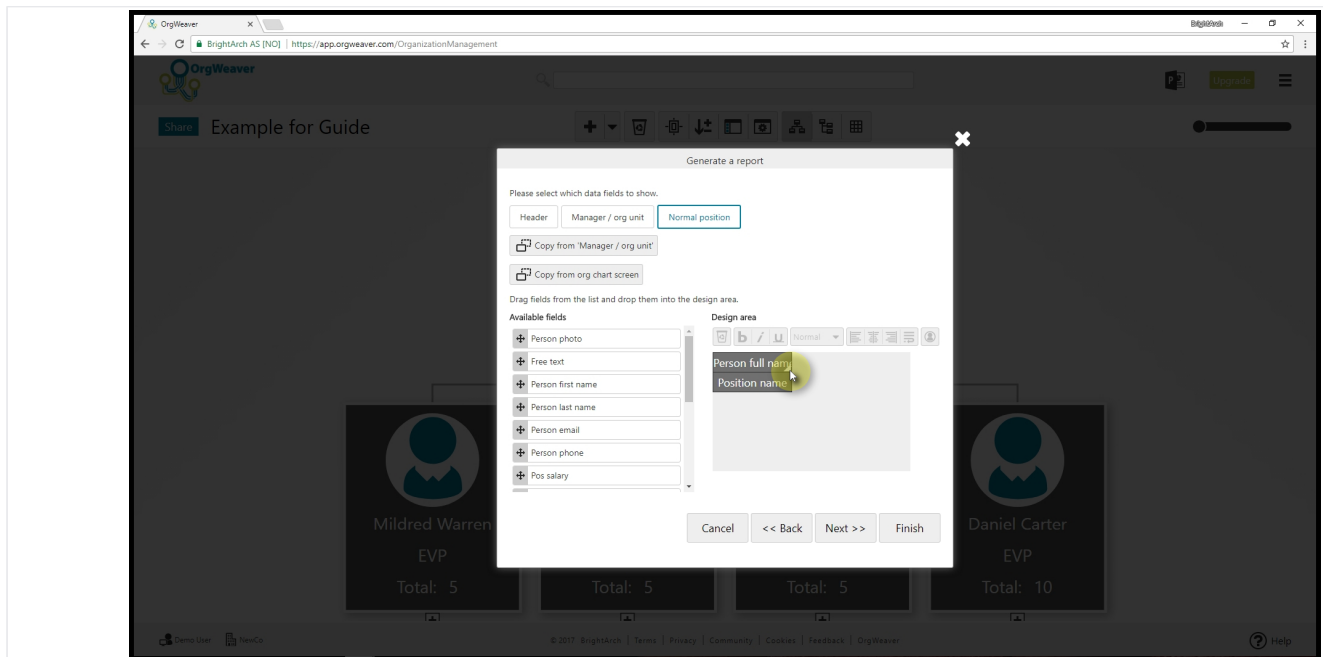
Click on "Manager / org unit" button to design what your org chart boxes will look like.

You can design Manager boxes on their own so you have to option to add more data to just the managers



Design Normal boxes

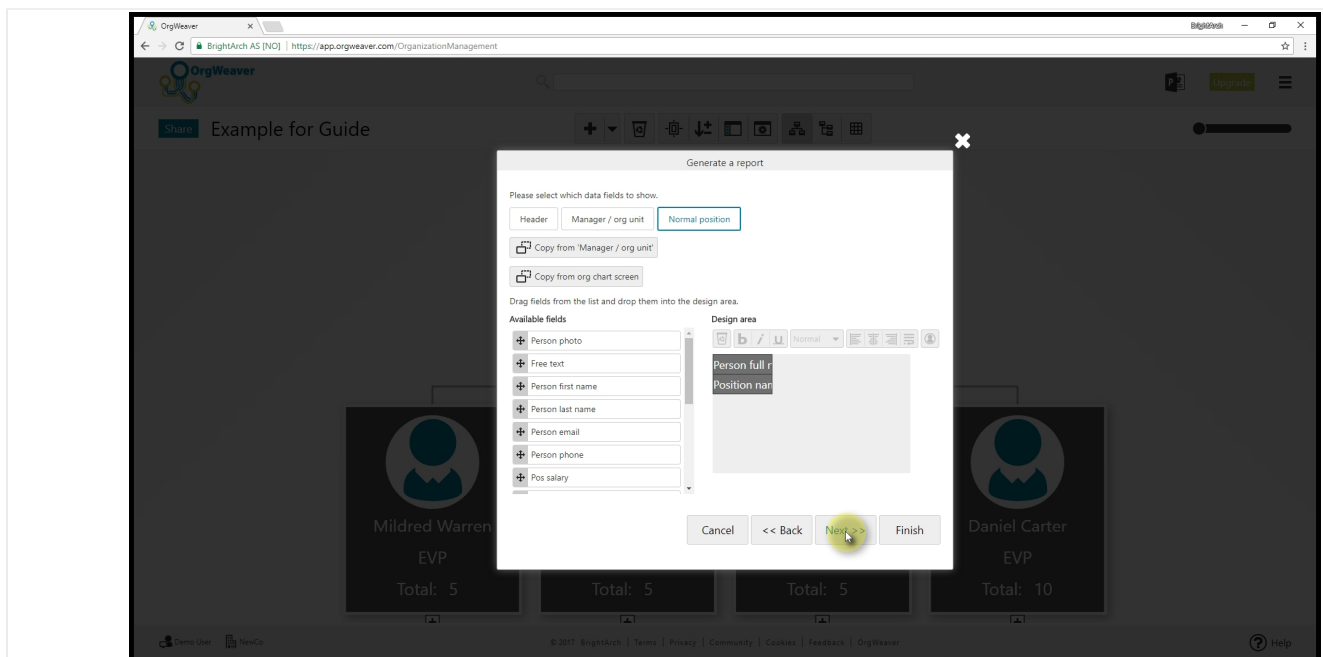
Click on "Normal position" to design what those org chart boxes will look like.



Change box sizes

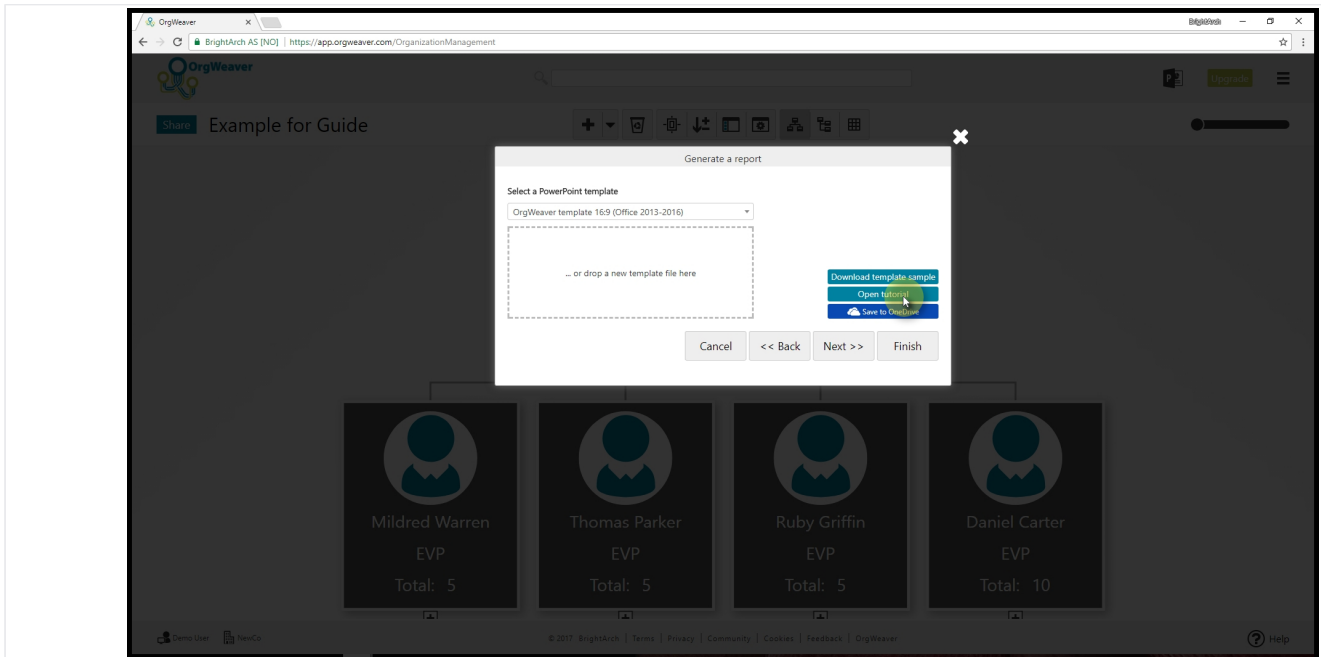
Click and drag the white triangle in the bottom of any data field to change how much space it has in the org chart box.

It's recommended to make Normal boxes smaller so that more boxes can fit on each slide.



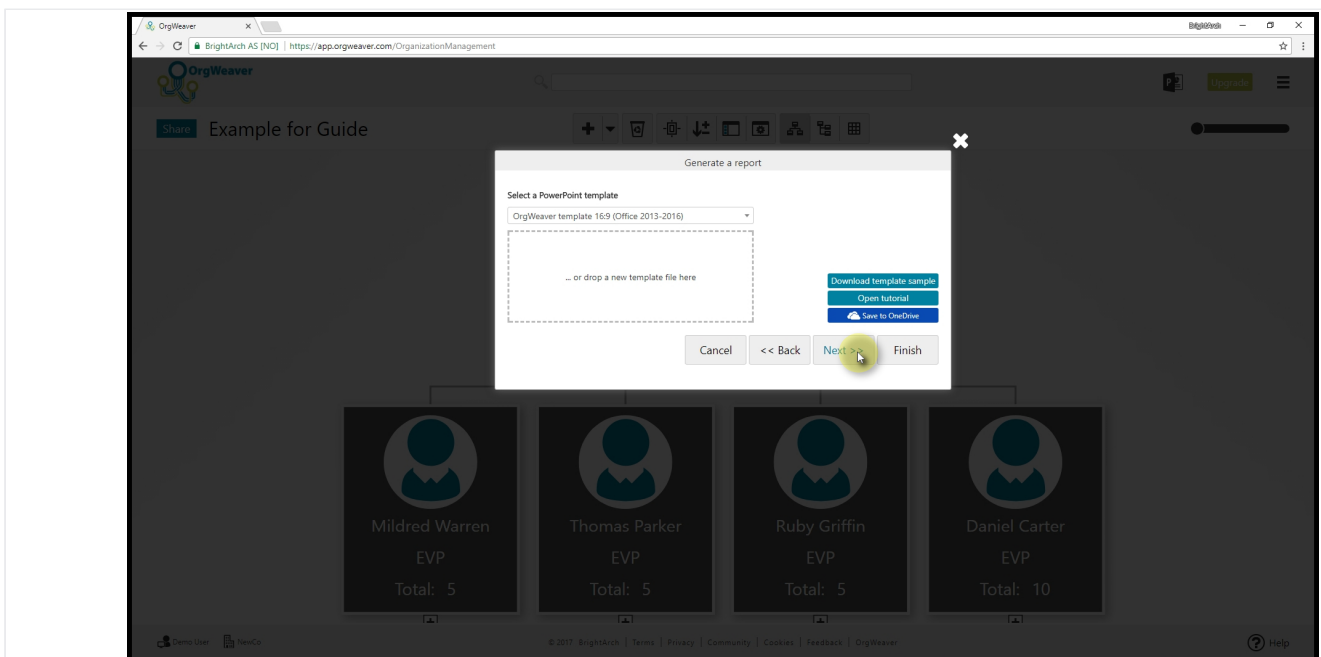
Move on to more options

Click "Next"



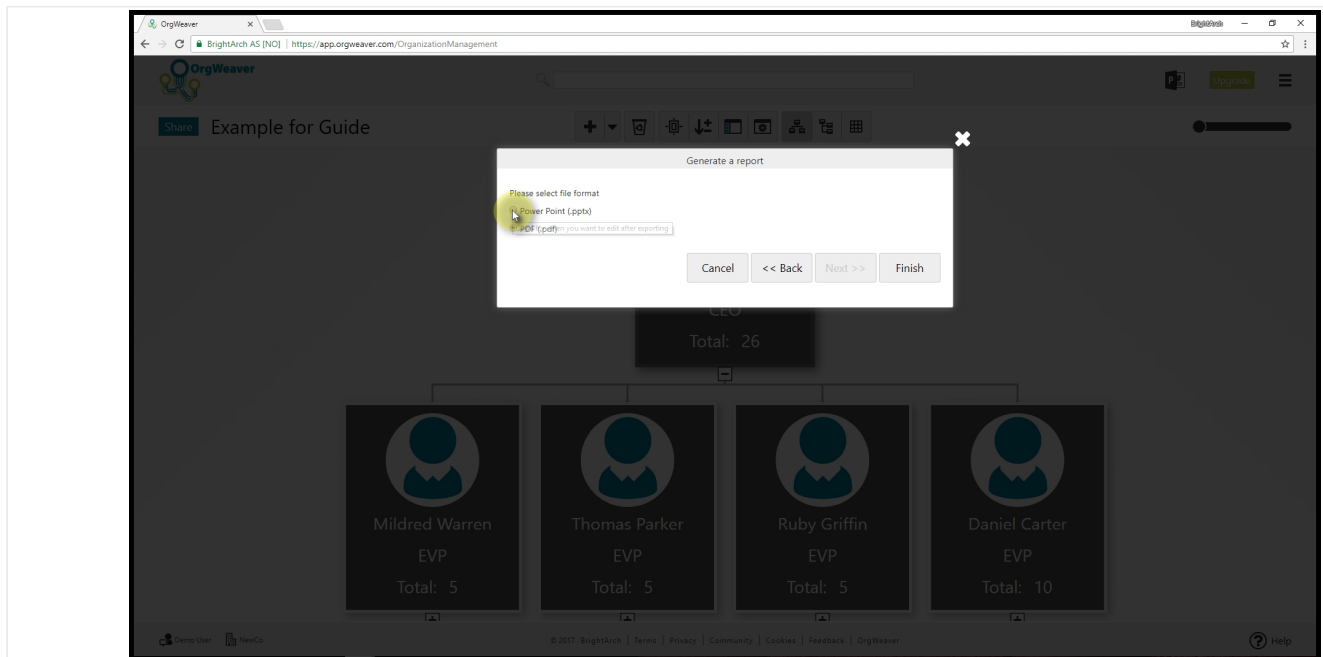
Select a template

Select a pre-saved PowerPoint template, or click on "Open tutorial" to learn how to upload your own template with your official colors, logos, fonts, and styles.



Choose final options

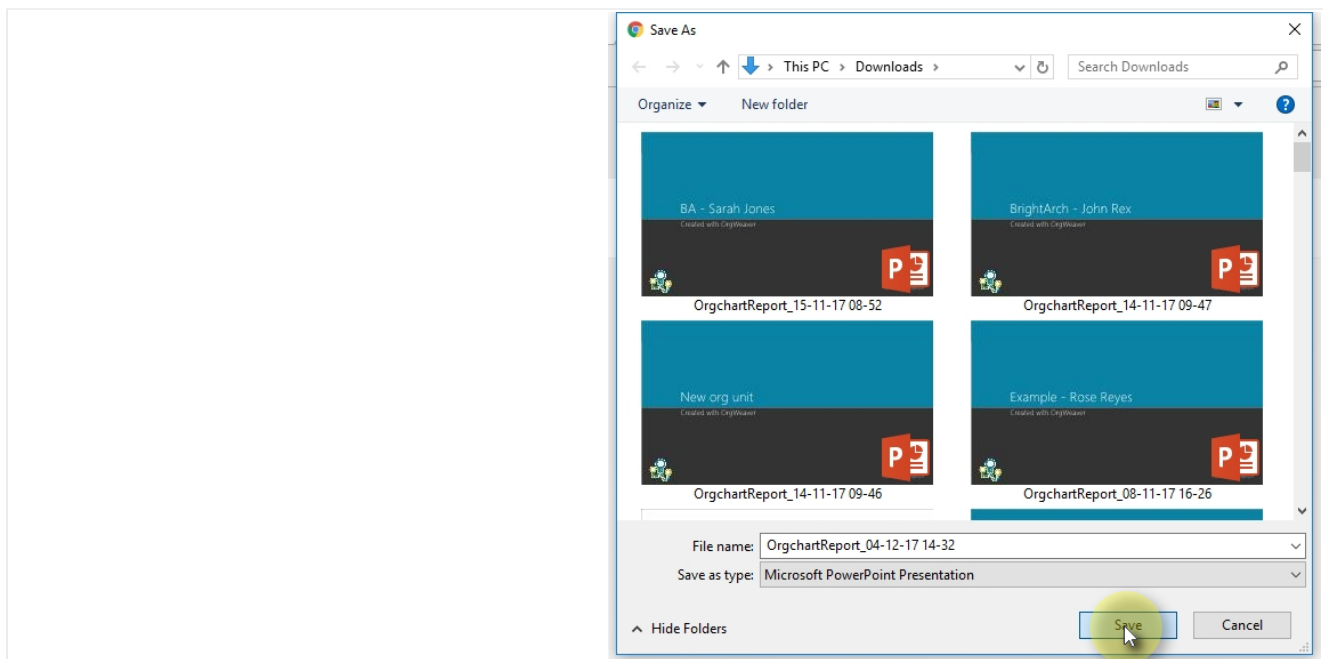
Click "Next"



Choose between PowerPoint or PDF

Click "Finish" after making your choice of document type.

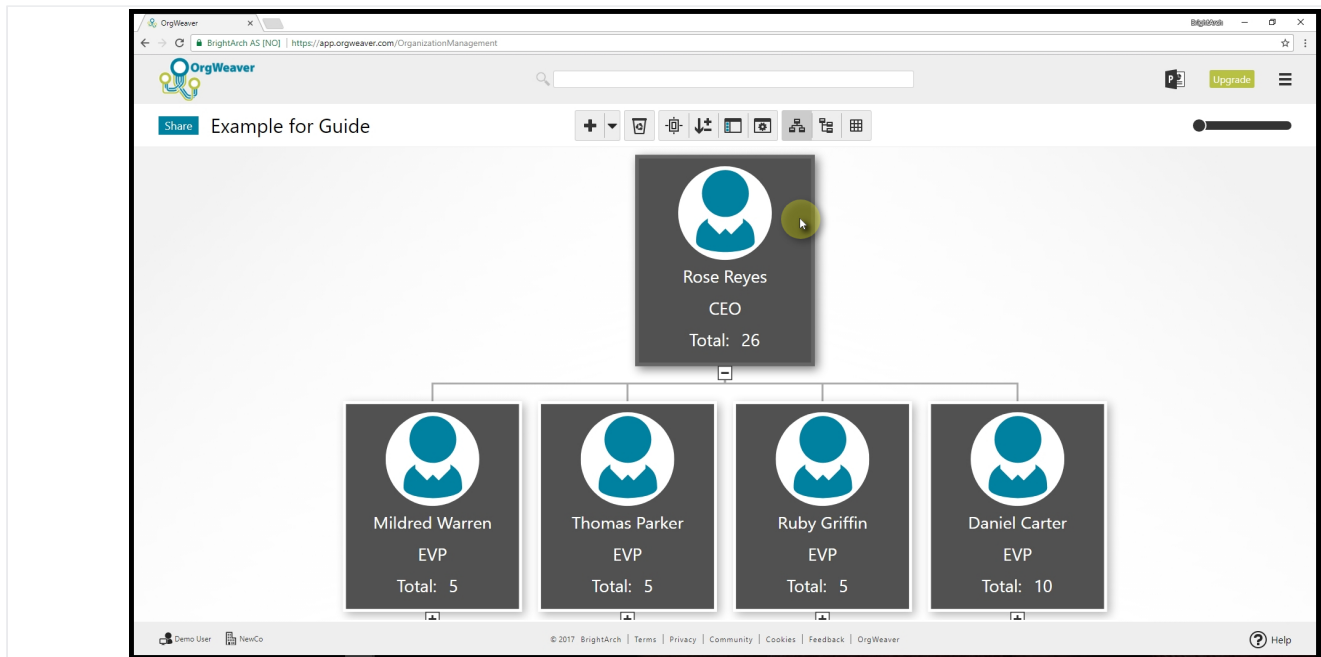
Tip: Want to go through these options quicker next time? OrgWeaver saves all of your settings, so you can just click "Finish" right away next time you want to export an org chart.



Save to your computer

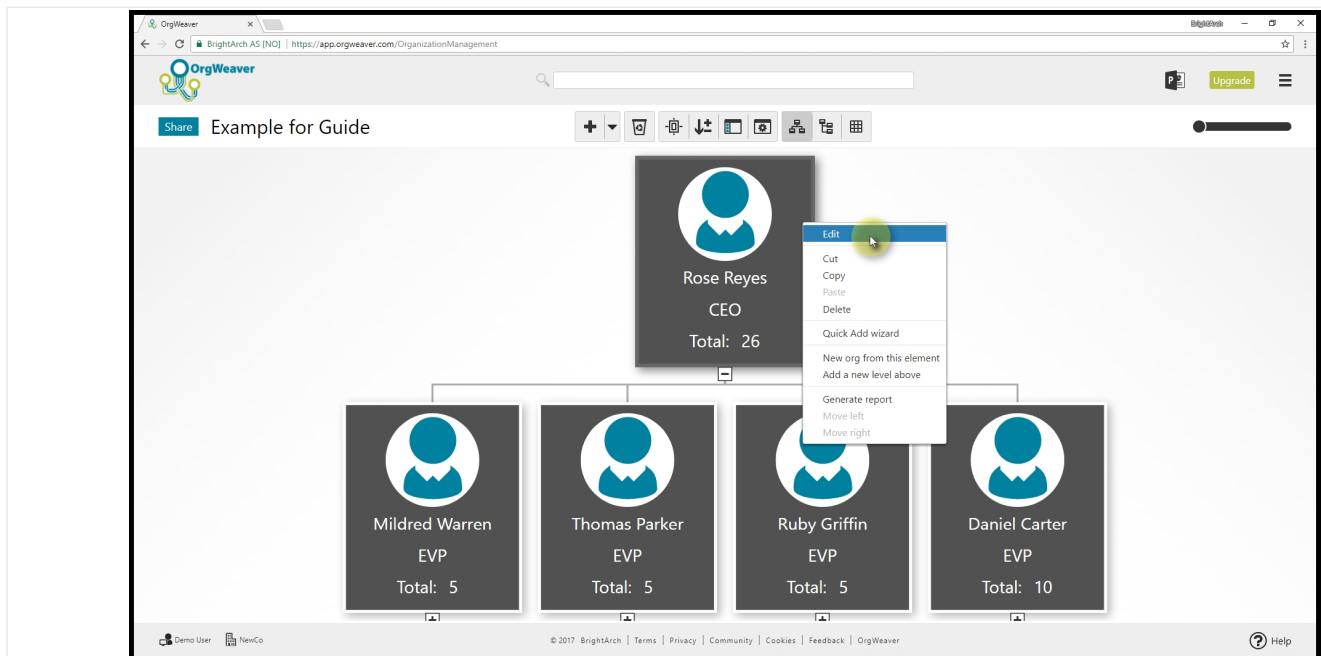
Click on "Save" button to download to your computer

Edit org chart data



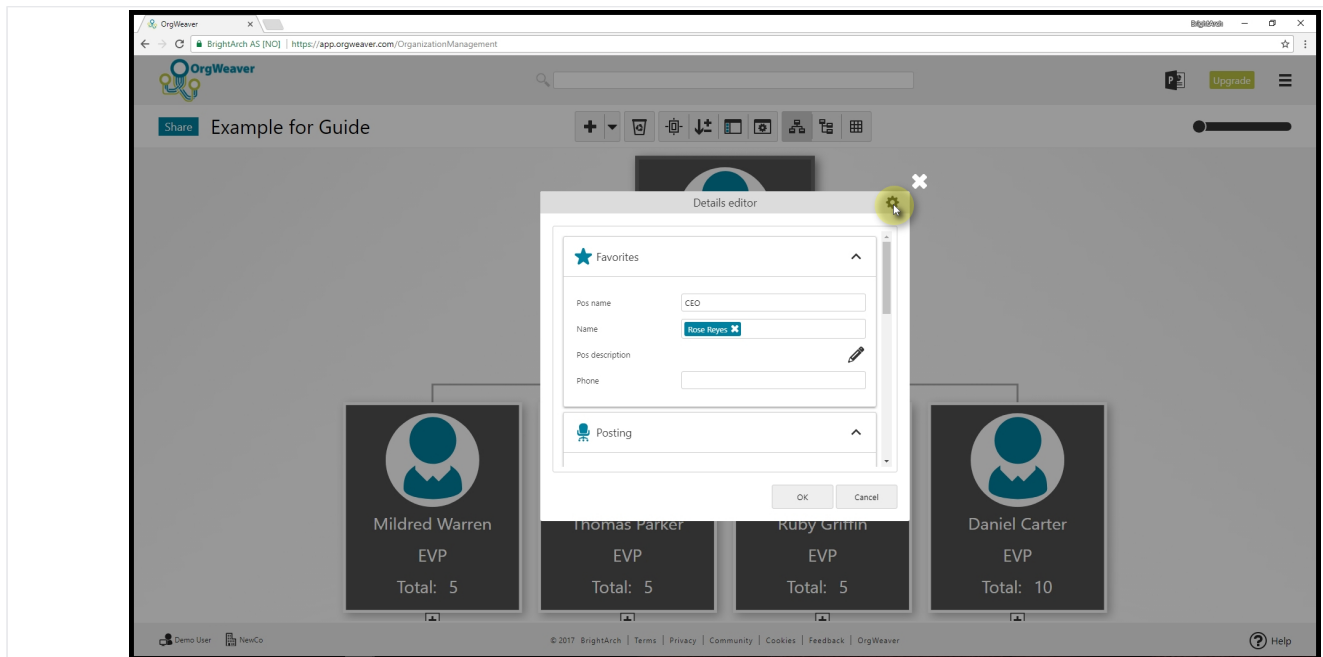
Choose any box

Right click on any org chart box



Select Edit

A pop-up will appear with much more data than is visible in your org chart.

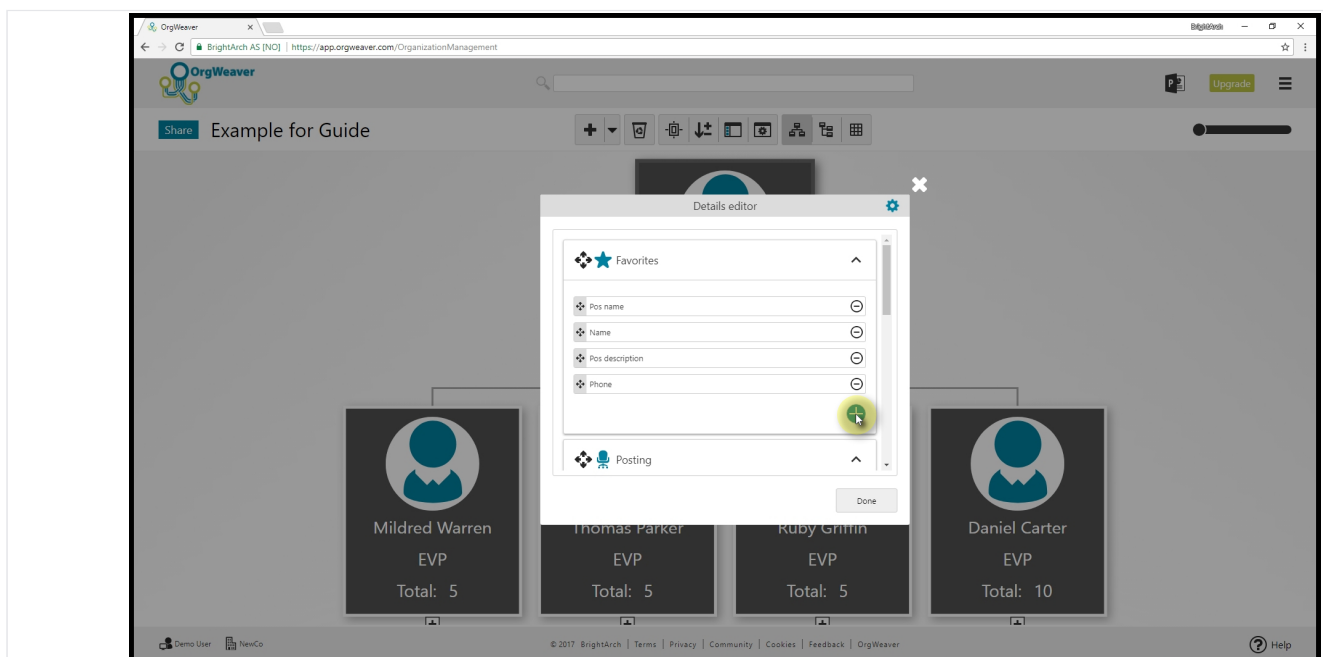


Select what data to see

The pop-up is organized in cards (like "Favorites"). Some data is already available in each card.

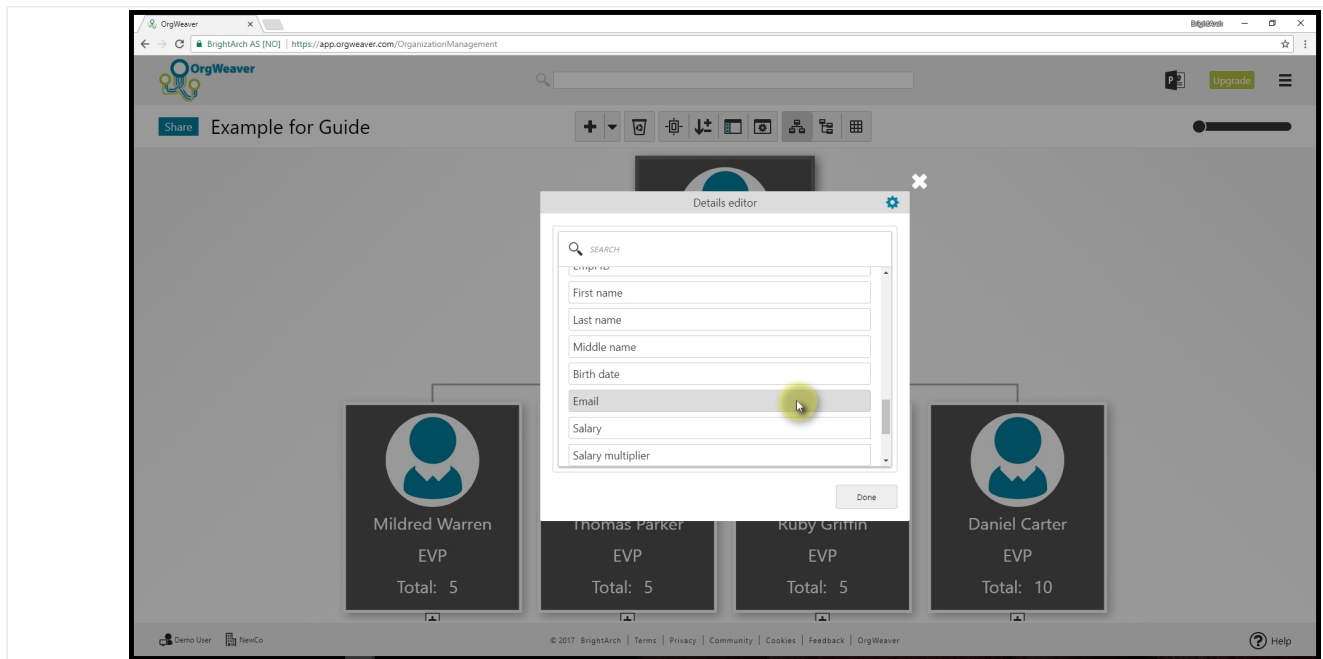
To edit, just click the field and start typing.

To change what data is shown in each card, click the gear icon in the top right.



Add more data to a card (1 of 3)

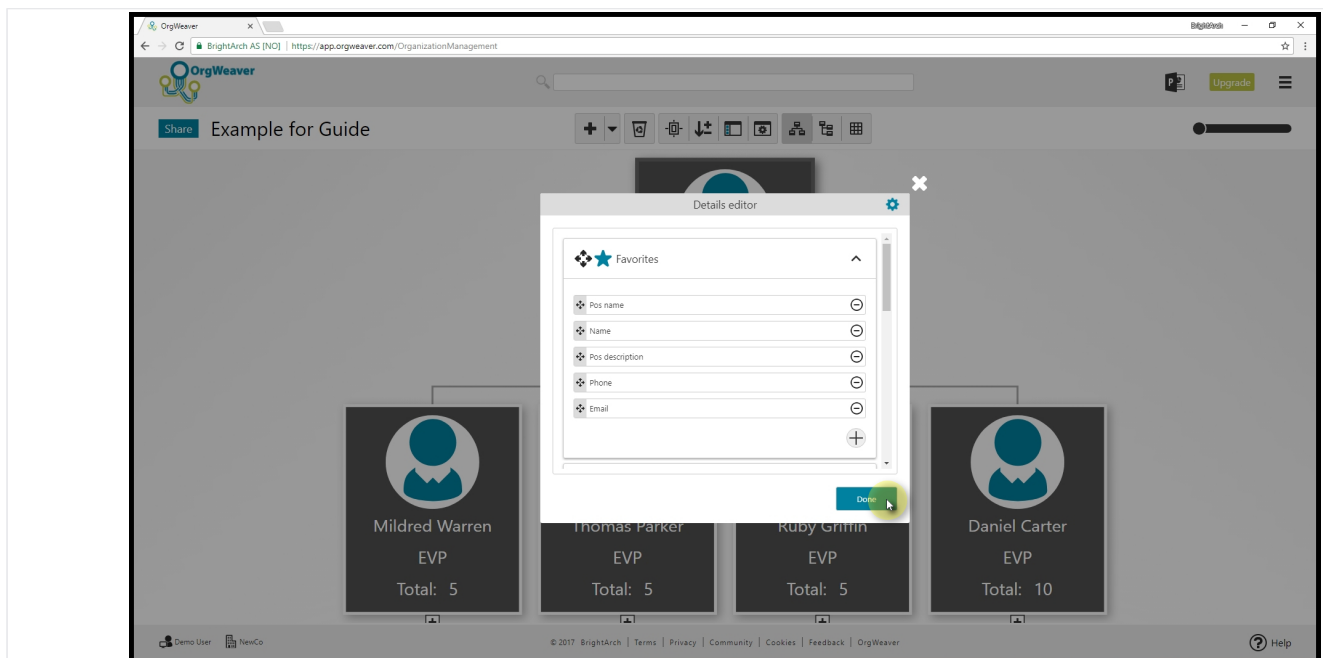
Click on the plus button



Add more data to a card (2 of 3)

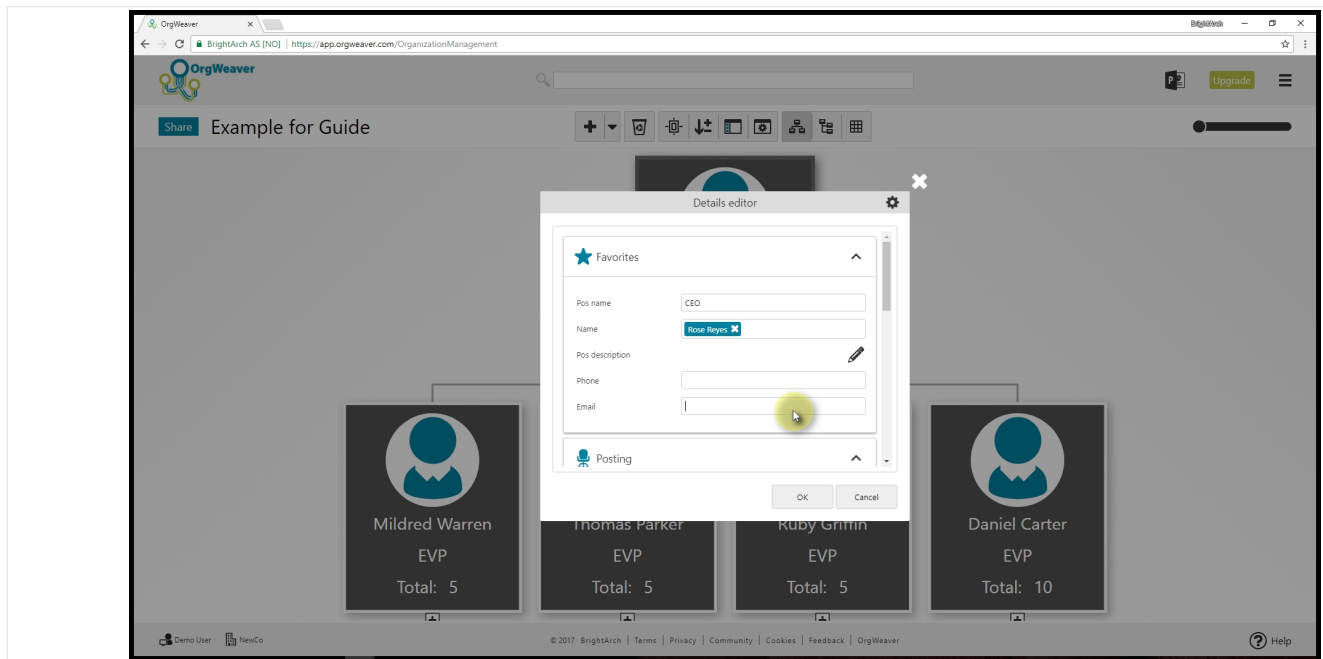
Scroll (or search) to find the data type you want to add to the card.

Select the data type (in this case, Email)



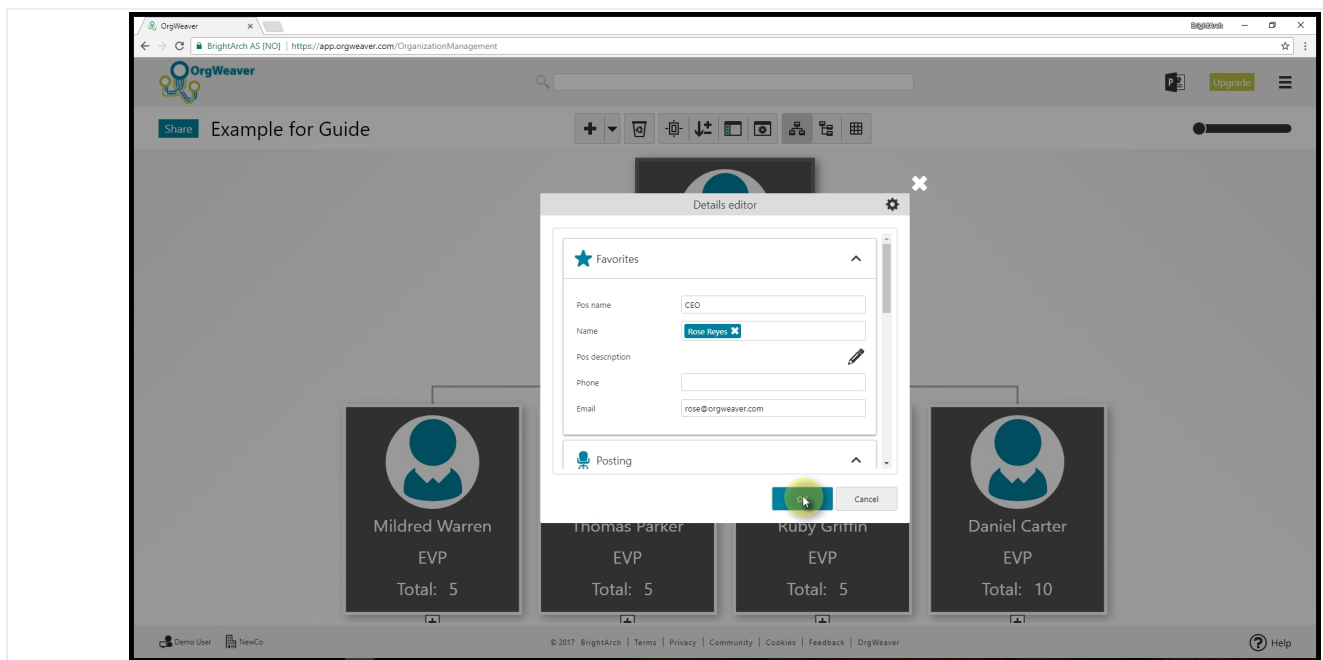
Add more data to a card (3 of 3)

Click "Done"



Enter new data

Click on any field (in this case, the Email field, and start typing)



Save what you edited

Click "OK"