

## Excel 2007 Org Chart—Getting Started and Helpful Tips

### Getting Started for a Basic Standard Organization Chart:

Open new Excel sheet

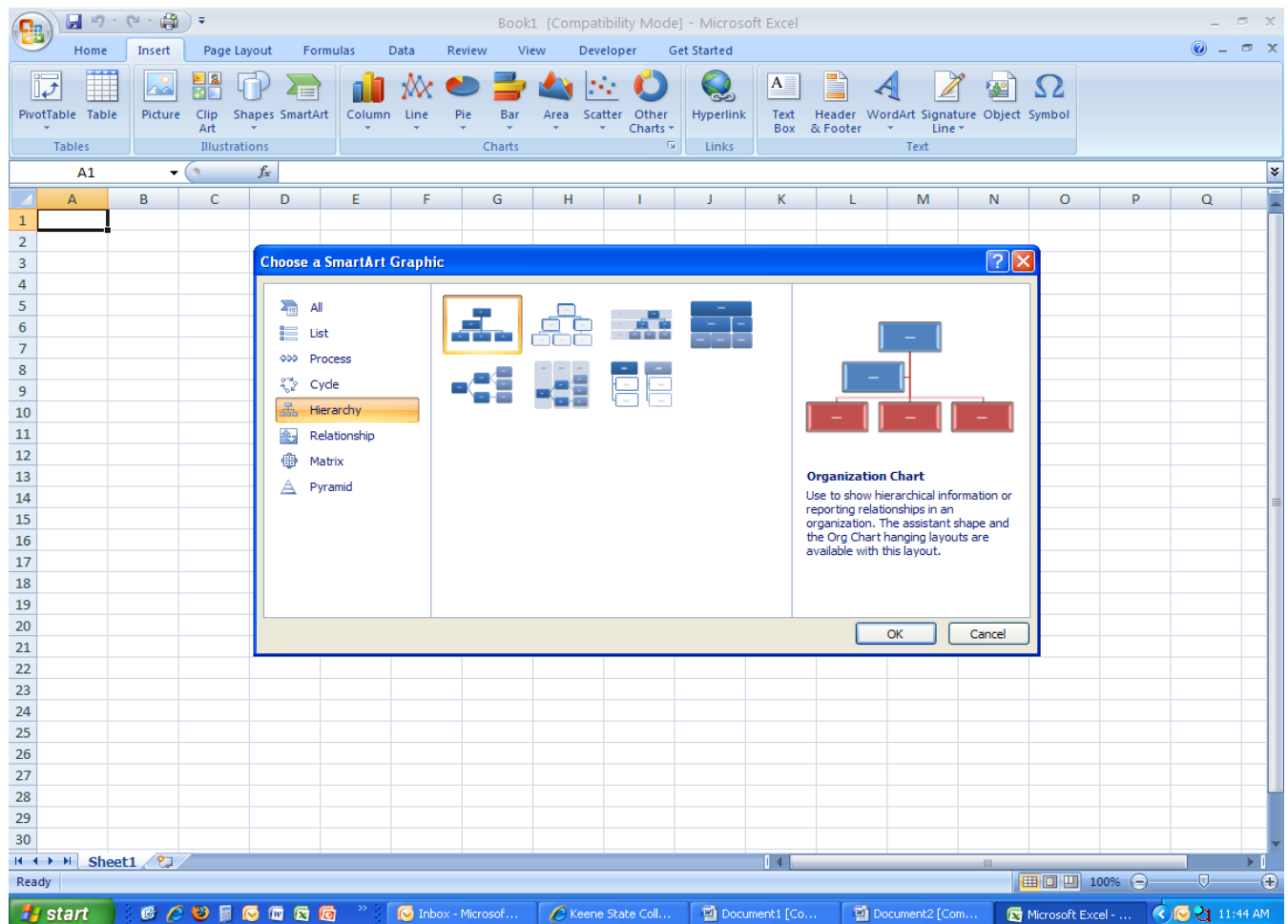
Click **Insert** Tab (*located to the right of the Home Tab*)

Go to **SmartArt** icon (located in the ribbon's Illustrations **group**, which is the second grouping from the left)

In the “Choose a SmartArt Graphic” box, select **Hierarchy** and click the one named **Organization Chart**

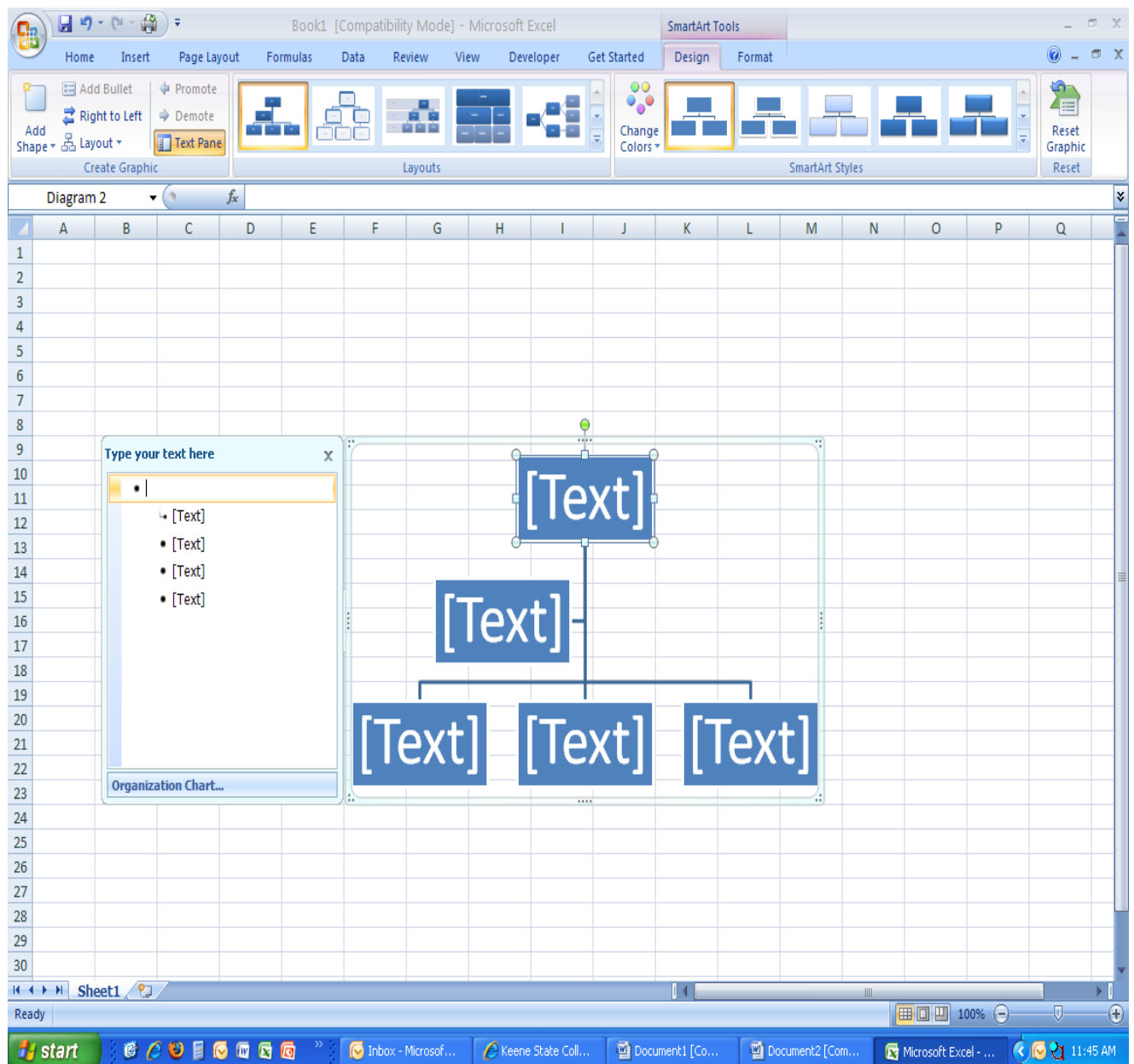
Click **OK** (screen shot below)

The **Organization Chart** layout selection below provides a box for an Administrative Assistant. If you do not need this, you may choose another layout which best fits your department's model.



You are now in the **Design** tab.

On the left side of the ribbon is a grouping named **Create Graphic**. This is what you will use to add vertical and/or horizontal boxes to your org chart. It is recommended that you add all of your boxes before you begin populating your text fields.

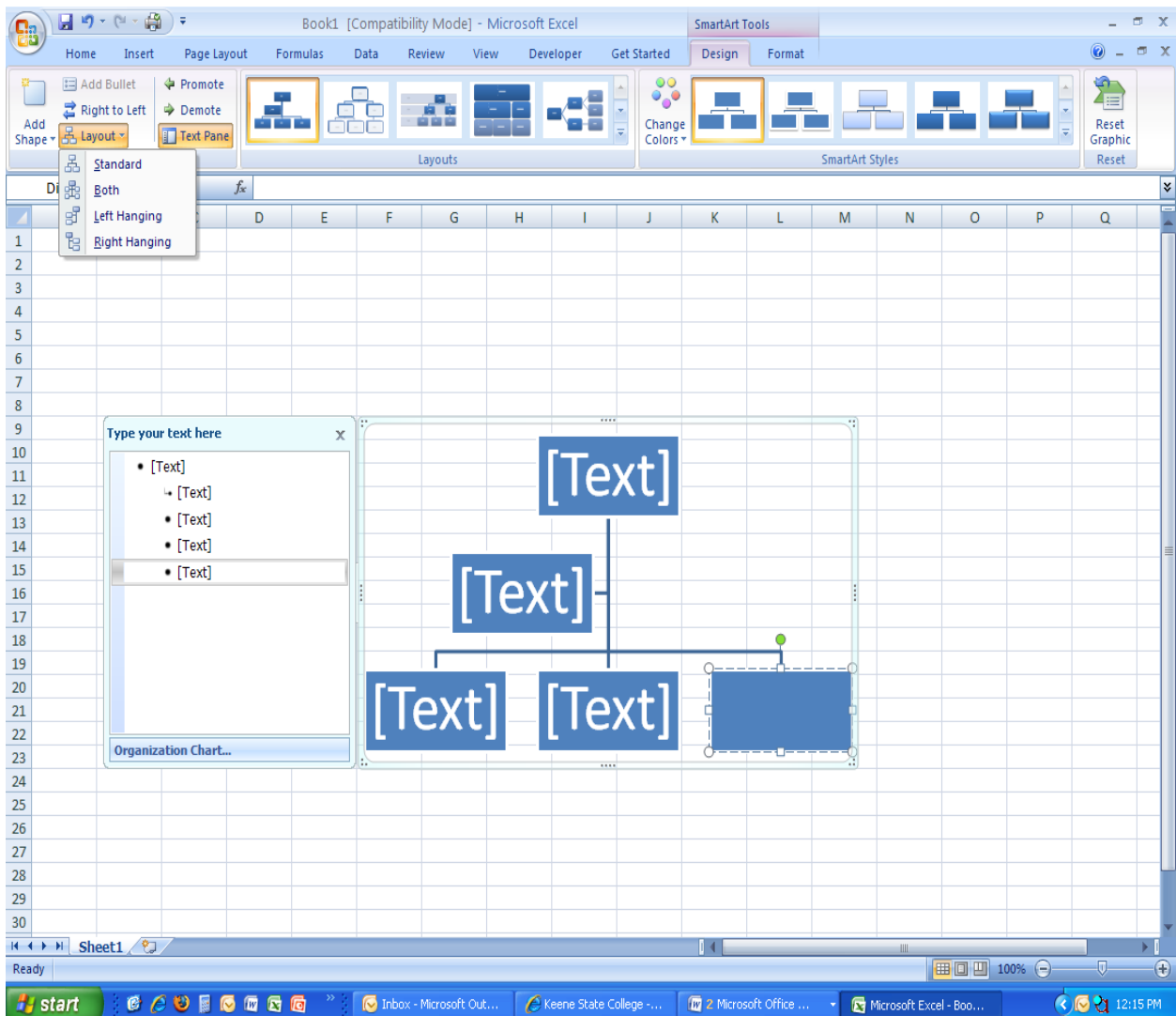


## Adding vertical and horizontal boxes to Org Chart:

**How to add a horizontal box to an existing row:** (illustration below shows three text boxes, directions will add a fourth)

**Click one of the boxes** on the row you want to add an additional box (*when you select the box it will appear solid—without the word “text” in the middle*) See illustration below.

In the “Create Graphic” section of the ribbon, click on “**Layout**” and select **Standard** under the drop down arrow.

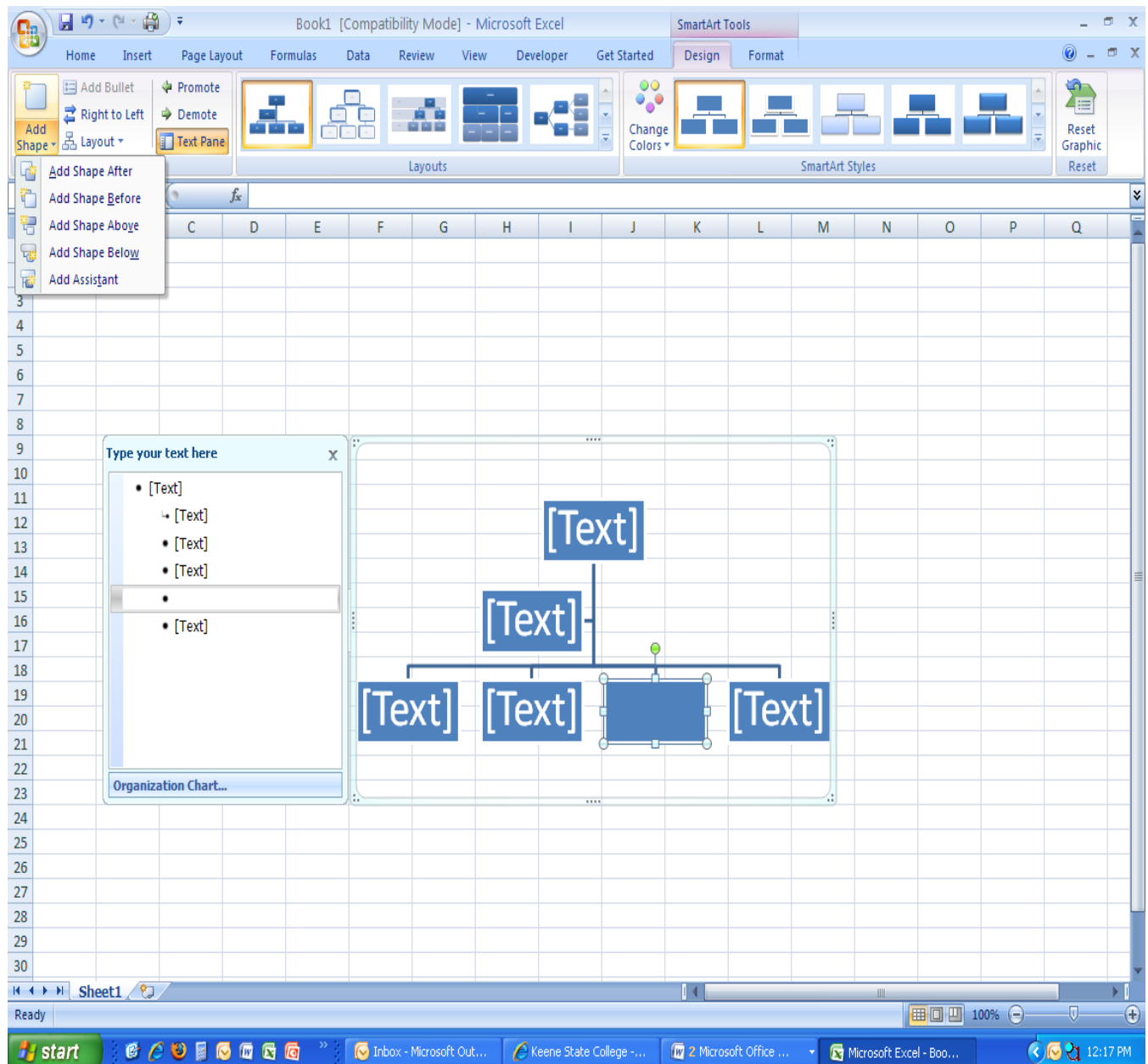


Then go to **Add Shape**.

Notice the drop down arrow

Click the arrow and select **add shape before or after** and click.

A new box will appear next to the one selected.



**To add a shape below one of the four text boxes:**

Select the text box you want the additional box(es) to appear below (shown below)

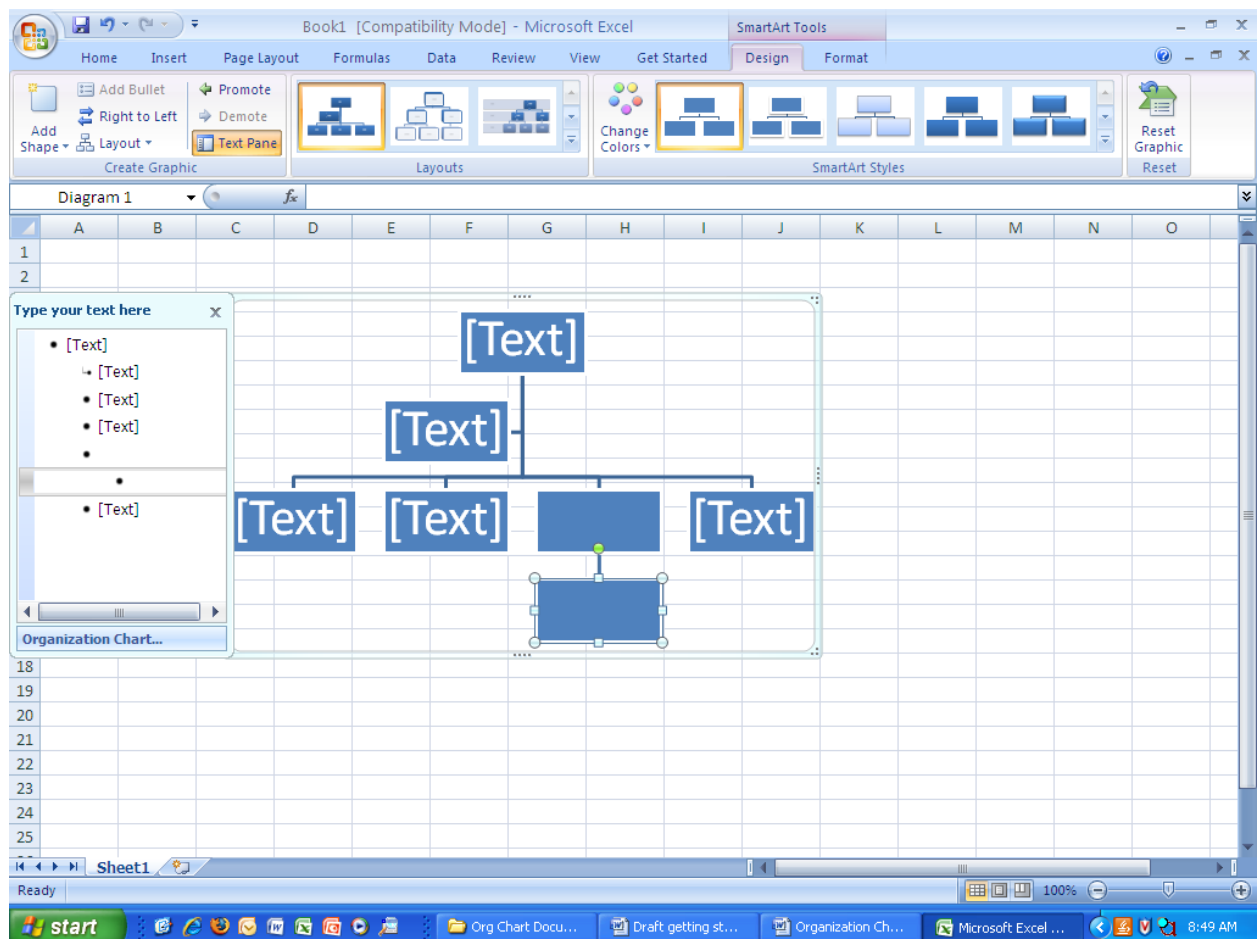
In the “**Create Graphic**” section of the ribbon, click on “**Layout**” and select **Standard** under the drop down arrow.

Then go to **Add Shape**.

Notice the drop down arrow

Click the arrow and select *add shape below* and click.

A new box will appear below the one selected.



**To add a new box horizontally:**

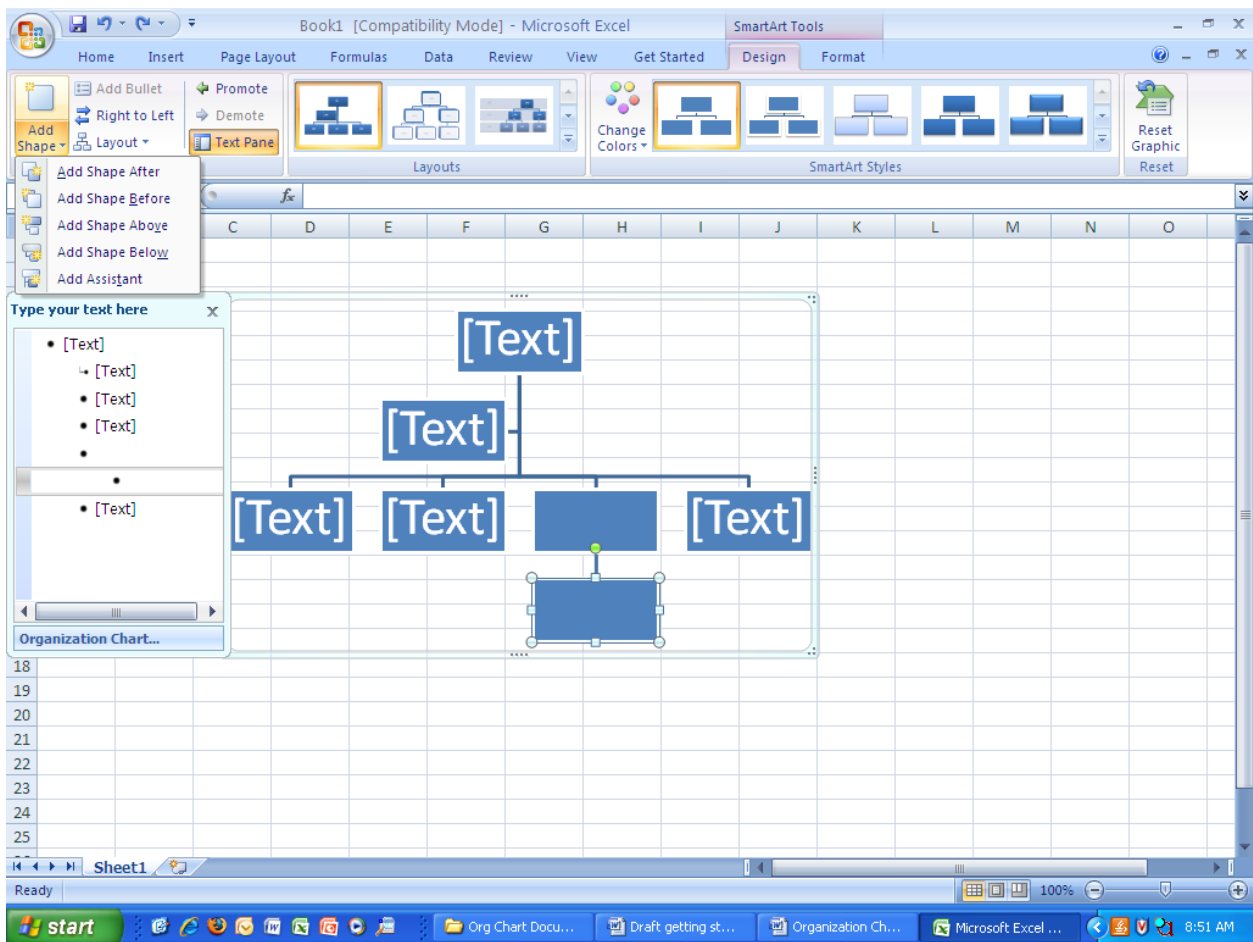
Click the box you want to add another box before or after.

In the “**Create Graphic**” section of the ribbon, click on “**Layout**” and select **Standard** under the drop down arrow.

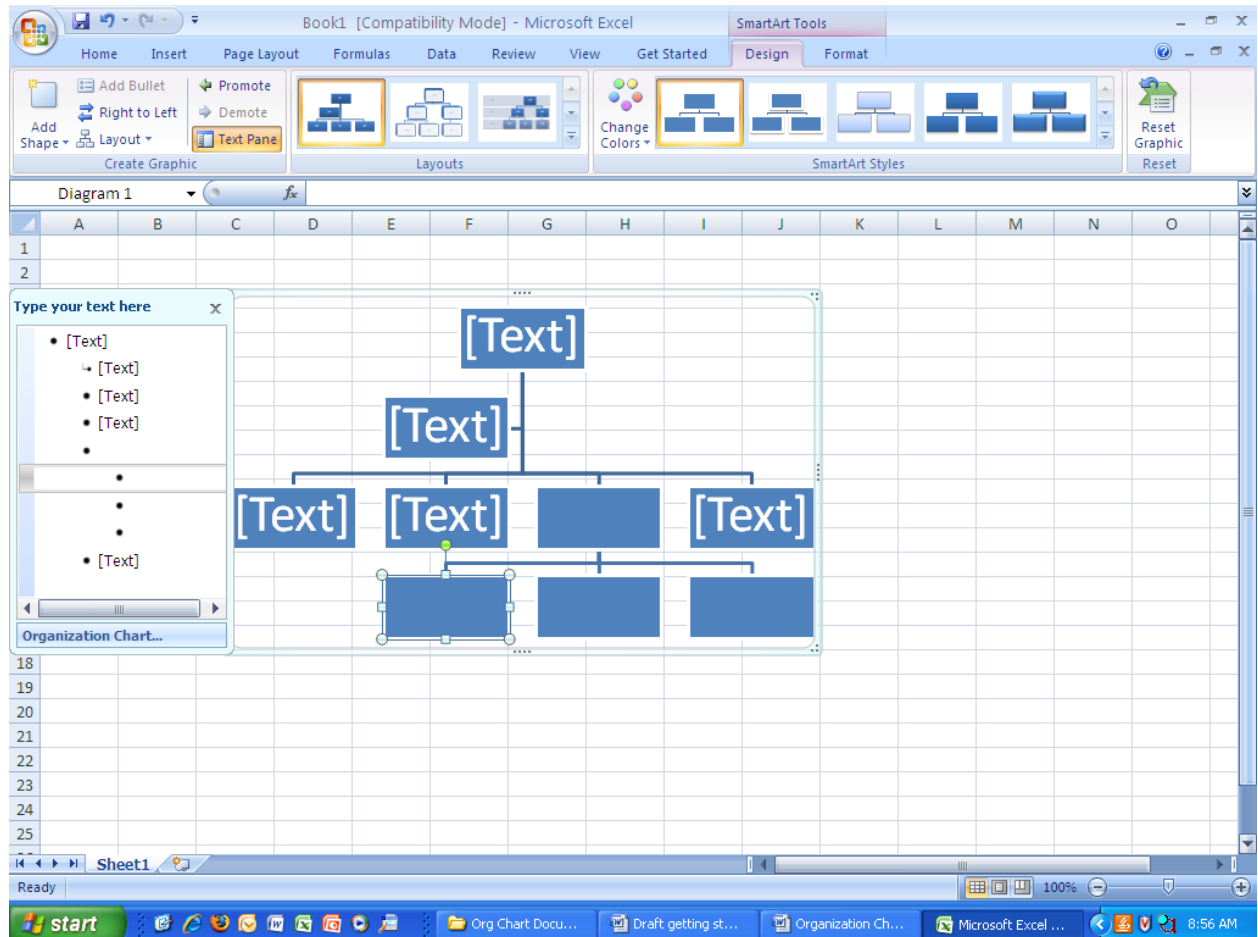
Then go to **Add Shape**.

Notice the drop down arrow

Click the arrow and select *add shape before or after* and click.



You can see where the additional horizontal boxes have been added:



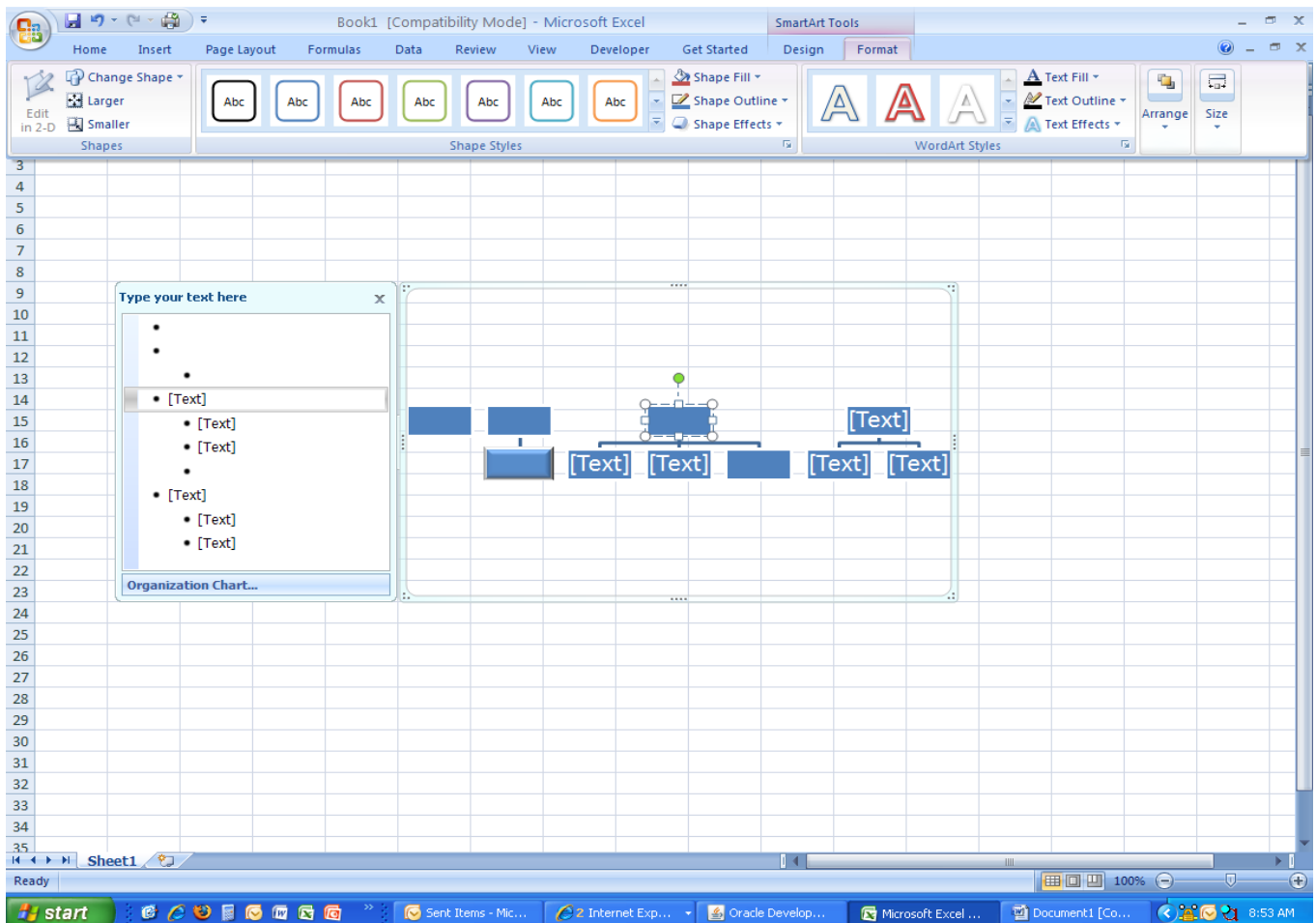
**That is it!** Those are the basics steps for creating a “standard” organization chart.

You can now add your text using the “**Text Pane**” shown to the left of your chart or add your text within the individual boxes.

## Here are some helpful hints and tips:

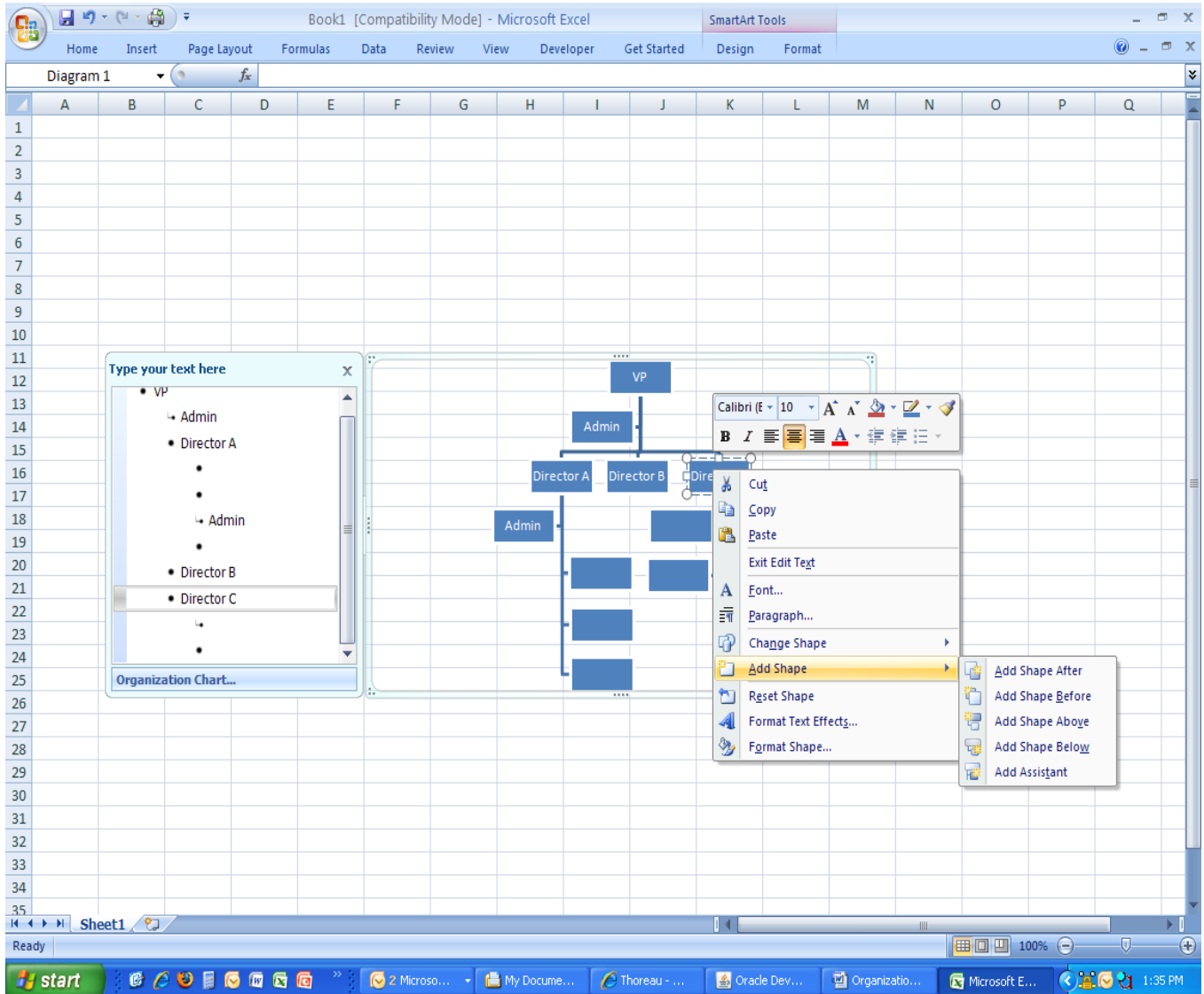
### *How do I change the color and text of the org chart?*

If you want to change the colors or text, select the **Format** tab on the ribbon, underneath **SmartArt Tools**. Your color options are available here.



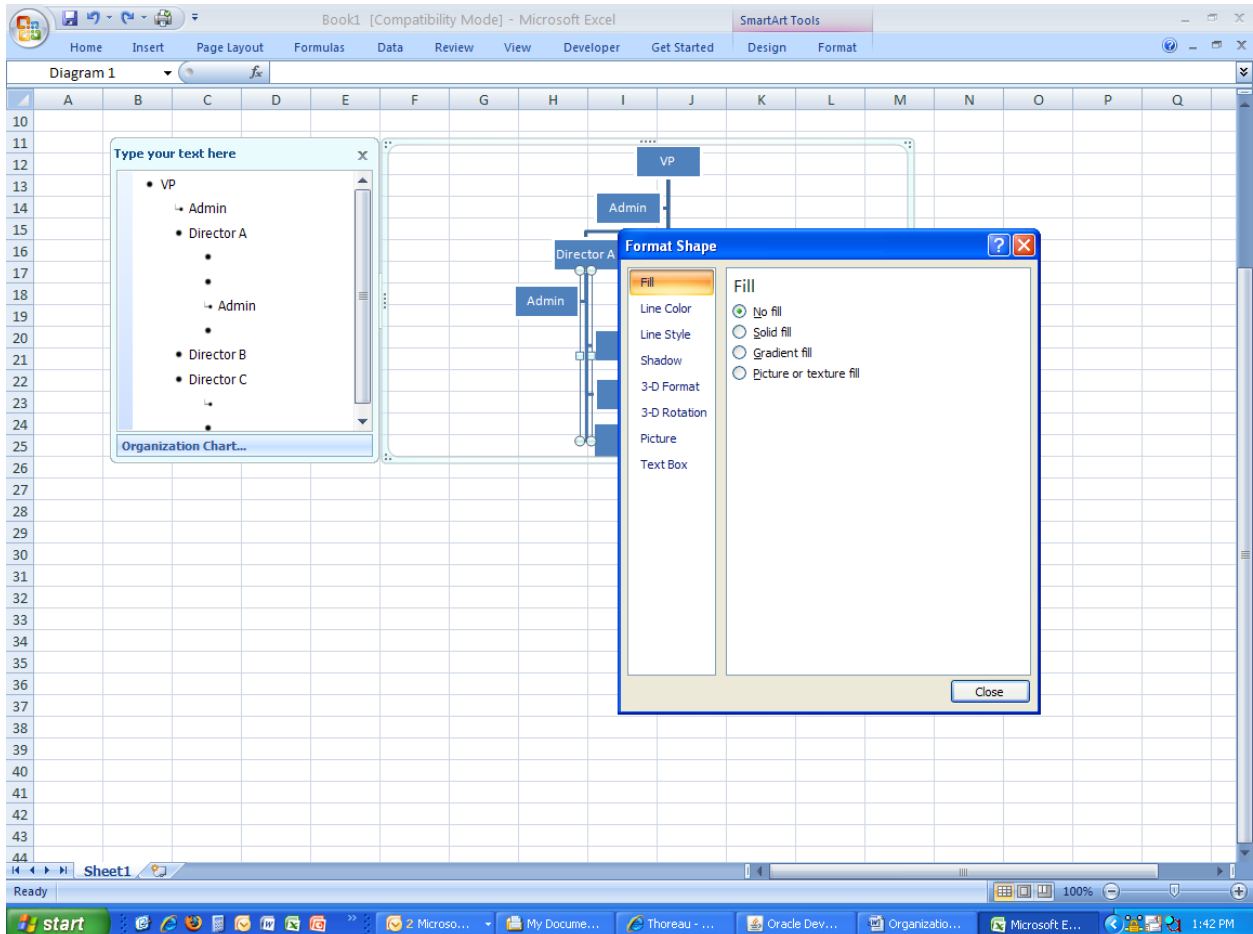
*Is there another way to add boxes, change shapes, and font?*

**Yes, hold the mouse over the box you want to change, **right click**, and **select the appropriate action**.**



## Can I remove lines from the org chart?

Yes. Hold mouse over the line you want to remove. **Right click** and select **Format Shape**. Then select **Line Color** and choose **no fill**. Close.



To learn everything you can do when creating your Excel organization chart, visit the Office 2007 Support page at: <http://www.keene.edu/it/helpdesk/office2007.cfm>

Or Microsoft Excel 2007, “Create an organization chart” website at:  
<http://office.microsoft.com/client/helppreview.aspx?AssetID=HA100758531033&QueryID=NhpE0WzBx&respos=3&rt=2&ns=EXCEL&lcid=1033&pid=CH101030631033>