

Organization Chart Guidelines

Box Descriptions & Connectors

1. Chart Title
Text Box Centered, no border, Width 4", height ¾"
Text Box Margins Top .2", all others .1"
- College Name
Dept Title
Campus
- Arial 12 Bold, Centered
Arial 14 Bold, Centered
Arial 12 Bold, Centered

Sample:

**Palm Beach State College
Vice President of Academic Affairs
District**

2. Level 1 (Top Position on org chart)
Executive Box, double line border, no shadow
Width 1 ½", height ¾" inner line
Text Box Margins 0.0"
- Position Title
Blank line
First Name Last Name
BP#
- Arial 10 Bold, Centered, may wrap to 2nd line
Arial 8
Arial 8, Centered
Arial 8, Centered

Sample:

Vice President of Academic Affairs

Jane Doe
BP# ABC123

3. Reports To Position (Optional):
Position Box, line pattern 2, weight 3,
Round corners 0.125", no shadow
Width 1", height ¾"
Text Box Margins 0.05"
Offset above to right of Top Position box

Position Title
First Name Last Name
Blank line
BP#

Arial 7 Bold, Centered, may wrap to 2nd line
Arial 7, Centered
Arial 7
Arial 7, Centered

Sample:

President

Jon Smith
BP# ABC123

4. Level 2 (Direct Reports)
Manager Box, single line border, no shadow
Width 1", height .62"
Text Box Margins 0.05"
May connect to Level 1 or Staff/Group Title Box

Position Title
Blank line
First Name Last Name
BP#

Arial 6 Bold, Centered, may wrap to 2nd line
Arial 6
Arial 6, Centered
Arial 6, Centered

Sample:

Dean Curriculum, Planning & Research

Jane Smith
BP# ABC123

5. Level 3 (Direct Reports & Assistants)

**Manager Box, single line border, no shadow
Width $\frac{3}{4}$ " , height $\frac{1}{2}$ "
Text Box Margins 0.05"
May connect to Level 2 or Staff/Group Title Box**

**Position Title
Blank line
First Name Last Name
BP#**

**Arial 5 Bold, Centered, may wrap to 2nd line
Arial 5
Arial 5, Centered
Arial 5, Centered**

Sample:

Dean Curriculum, Planning & Research

Jane Smith
BP# ABC123

6. Professors

**Manager Box, single line border, no shadow
Width 1" , height $\frac{1}{4}$ "
Text Box Margins 0.05"**

**Position Title –Abbreviated discipline
First Name Last Name
BP#**

**Arial 6 Bold, Centered, may wrap to 2nd line
Arial 6, Centered
Arial 6, Centered**

Sample:

Associate Professor -NS

Jane Smith
BP# ABC123

7. Policies & Procedure

**Manager Box, single line border, no shadow
Width 1" , height $\frac{1}{2}$ "
Text Box Margins Bottom .05" , all others .1"**

Area Title

Arial 7, Centered, may wrap to 2nd line

Sample:

Academic Policies & Procedures

8. Staff/Group Title

**Manager Box, single line border, no shadow, 1"
Width $\frac{3}{4}$ " , height $\frac{1}{2}$ "
Text Box Margins Bottom 0.05" , all others 0.1"**

Department/Group Reference

Arial 7, Centered, may wrap to 2nd line

Sample:

Support Staff

9. Sm Staff/Group Title

**Manager Box, single line border, no shadow, 1"
Width $\frac{3}{4}$ " , height .31"
Text Box Margins Bottom 0.05" , all others 0.1"
Use related small arrow to show reporting to
arrowhead 01**

Department/Group Reference

Arial 6, Bold, Centered, may wrap to 2nd line

Sample:

Adjunct Professors

10. Services/Program Name

Manager Box, single line border, no shadow, 1”
Width $\frac{3}{4}$ ”, height $\frac{1}{2}$ ”
Text Box Margins Bottom 0.05”, all others 0.1”

Department/Group Reference

Arial 6, Centered, may wrap to 2nd line

Sample:

Academic Services

**11. Direct Connect lines
(Reports to Position)**

Single line, arrowhead indicating report direction
Text on connect line “Reports To”, Arial 6, Centered
Vertical line height $\frac{1}{8}$ ” minimum

**12. Polices Connector
(Programs, polices, services)**

Line pattern 2, weight 1, Round corners 0.4375”
If multiple meet into one arrowhead, Center of box

13. Indirect Reports Connector

Line pattern 2, weight 1, straight line
If multiple meet into one arrowhead, Center of box

Document Standards:

1. Paper and layout
2. Organization Chart Footer:
Effective Date: July 1, 2010

8 $\frac{1}{2}$ ” x 11”, landscape, $\frac{1}{8}$ ” margins
Arial 10, Lower Left

3. File naming convention

No shadows, no themes, black text
Align box tops for same level
Line weight 03, begin/end medium, arrowhead 13
Save separate MS Visio file for each org chart
Top Position Title – Campus - Last name

NOTES:

1. Report To box type selected is a position box from the original Organization Chart Shape Stencil and formatted for the colleges needs. The object previously selected is not an Org Chart object and would cause individuals the need to find in within its original stencil.
2. If you move an objects connecting line away from the connect box, it will break the relationship connection!
3. Continue to verify subordinates remain intact
4. Current organization maximums are 13 horizontal employee boxes and 13 vertical employee boxes with the exception of Professors up to 26 to be listed vertically

Using Visio to create organization charts

1. Start with New Organizational Chart NOT a blank page or Org chart features/functionality will not be available
2. Use Palm Beach State Template and Stencil provided by HR
3. To maintain college wide org charts with the same look and feel a template and stencil are provided.
4. Nudge shape – use Shift & Arrow key
5. Vertical/Horizontal dotted line appears when shape you are moving is centered with another shape.
6. Auto Connect – Org charts, drag & drop position box on who that person reports to OR look for light blue arrows; Arrow shape connects with will turn dark blue

Key Tools

1. Stencil – File, Shapes, My Shapes, Palm Beach State Org Chart

2. Add Shapes – Drag and drop from stencil
3. Connector – Toolbar, Connector Tool, (6th button from right), click connector x, drag to connecting object, red boxes will appear on both objects
4. Turn off Connector Tool – Toolbar, Pointer Tool, (7th button from right),
5. Alignment – Menu bar, Shape, Align Shapes, select, OK
6. Ungroup – Select shapes, Menu bar, Shape, Grouping, Ungroup, click OK to warning
7. Distribute – Select shapes, Menu bar, Shape, Distribute Shapes, select desired option, OK
8. Margins – 1/8” inch all sides, utilize Print preview to ensure diagram remains within margins
9. Headers/Footers – Menu bar, View, Header and footer, preset in template, Left side, Arial 10 pt
Effective Date: July 1, 2010
Chart Title – Centered top just inside margin, preset in template
10. Add text to connector line – double click on the line and type