

Visio 2007 - Organization Chart Wizard

This procedure will create an organizational chart in Visio from an Excel file.

Step 1 – Create an Excel file with the following records:

	A	B	C	
1	Employee ID	Name	Reports to	Department
2	1	President		Office of
3	2	VP Sales	1	Sales
4	3	VP Marketing	1	Marketing
5	4	VP R&D	1	Research
6	5	VP Operations	1	Operations
7	6	VP Finance	1	Finance
8	7	Direct	2	Sales
9	8	Corporate	2	Sales

Required Data

Employee ID field - in this data file contains numbers that uniquely identify each employee. If no employees have the same name, Name can serve as the unique identifier.

Reports To field - must contain managers' unique identifiers. Leave the Reports To field blank for the person at the top of the chart.

Optional Data

Your data file is likely to include a number of fields in addition to Unique Identifier, Name, and Reports To. For example, you might have fields for position title, phone number, department, and more. The Organization Chart Wizard lets you decide if you want to include this information in the Organization box. This optional data can be stored in the data in property fields associated with the shapes so others have access to the data through the right-click menu.

File→New→Business→Organization Chart Wizard

Step 2 – Choose the method to create the Organization Chart.

I want to create my organization chart from:

Information that's already stored in a file or database

Information that I enter using the wizard

Description

Choose this option if your data is stored in a text (*.txt), Org Plus (*.txt), Excel (*.xls), Microsoft Exchange Server, or ODBC-compliant database file.

Step 3 – Define the file type.

My organization information is stored in:

A Microsoft Exchange Server directory
A text, Org Plus (*.txt), or Excel file
An ODBC-compliant data source

Note
To ensure that your data is formatted correctly, click the Help button.

Step 4 – Browse where the file located.

Locate the file that contains your organization information.

F:\Visio\Org Chart Wizard.xls

Browse...

Step 5 – Choose the data file columns.

Choose the columns (fields) in your data file that contain the information that defines the organization.

Name: Name

Reports to: Report to

First name: <none>
(optional)

Description
The Name column (field) contains data that identifies the person.

Step 6 – Choose the fields to be displayed.

Choose the columns (fields) from your data file that you want to display.

Data file columns: Displayed fields:

Report to
Number of direct r

Add >

< Remove

Name
Title
Telephone
Department

Up Down

Step 7 – Choose the custom properties.

Choose the columns (fields) from your data file that you want to add to organization chart shapes as custom property fields.

Data file columns: Custom Property fields:

▲

▼

Add >

< Remove

▲

▼

Department
Name
Title
Report to
Number of direct r
Telephone

Step 8 – Choose the name of the top Executive.

Your organization data may contain too many employees to fit on one page of your drawing. You can specify how much of your organization to display on each page or you can let the wizard define each page automatically.

- I want to specify how much of my organization to display on each page
- I want the wizard to automatically break my organization chart across pages

Name at top of page:

- Hyperlink employee shapes across pages
- Synchronize employee shapes across pages