

CREATING AN ORGANIZATIONAL CHART WITH VISIO

NAVIGATION

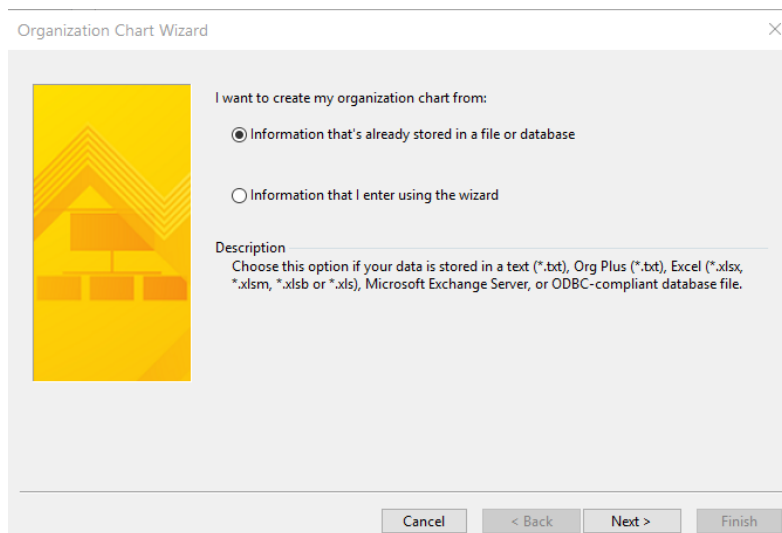
1. Run **Supervisor ID Report**

- a. Login to **myUFL > Main Menu > Enterprise Analytics > Access Enterprise Analytics**
- b. Under Team content, select the **Human Resources Information** folder
- c. Next, select the **Workforce Information** folder
- d. Locate the **Staff List with Supervisor Info by Department** report
 - i. Reports are listed in alphabetical order
- e. Next, Type in the department number and click **Magnifying Glass**
- f. Select the department(s)
- g. Then click **Finish**
- h. Once report is generated
 - i. Remove header row
 - ii. Remover duplicate employee IDs
 1. Secondary OPS records
 - a. Use Conditional Formatting to identify then highlight duplicate values
 2. Duplicate names
 - a. If needed, add a punctuation mark to distinguish between duplicate names
- i. Then save; the **Supervisor ID Report** will serve as a source file

2. Open **Visio Professional**

3. Select **Organizational Chart**, then **Create**

4. Use **Organization Chart Wizard** then select stored/source file and “Next”

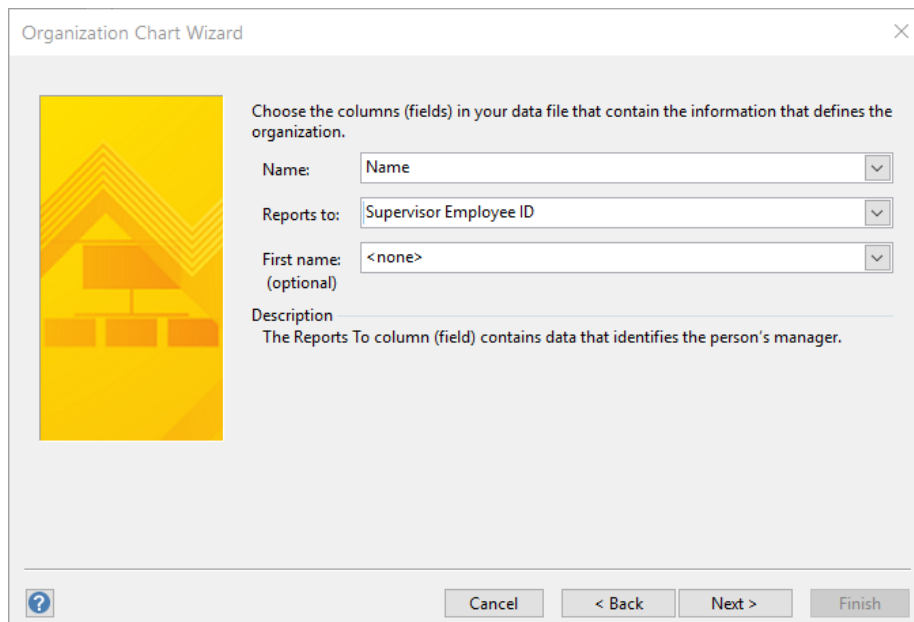


5. Select Excel file, then “Next” to browse for the saved Supervisor ID Report

*Make sure to delete the first row, if the values are not starting with (ID, Name, Employee record, etc...) or the data file will not upload correctly to choose the column fields.

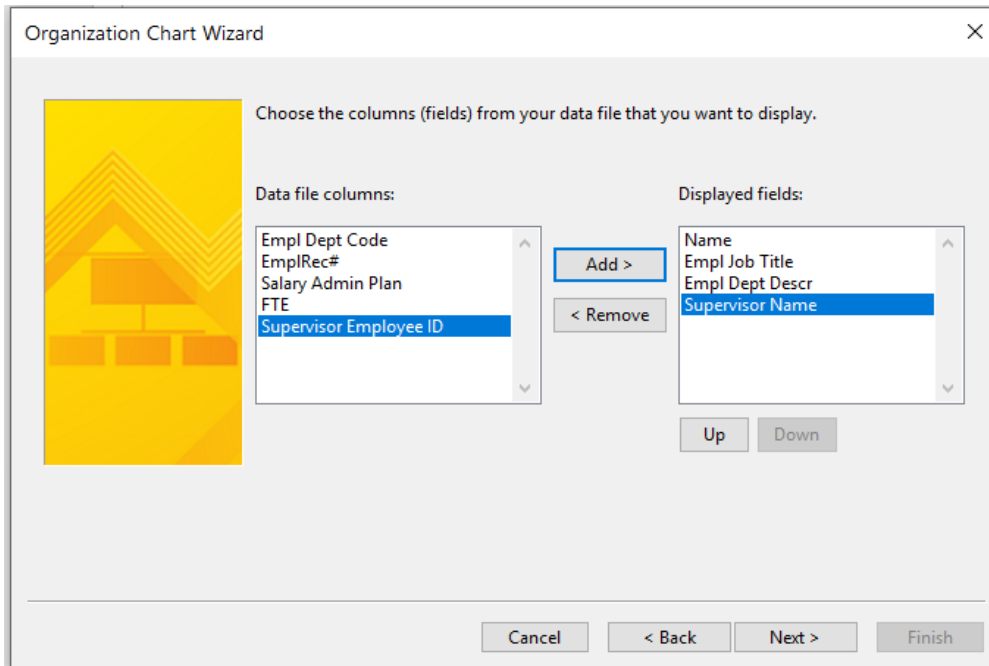
6. Click “Next” then choose the columns in the data file

- a. Name: Name
- b. Reports to: Supervisor Employee ID
- c. First Name: <none>

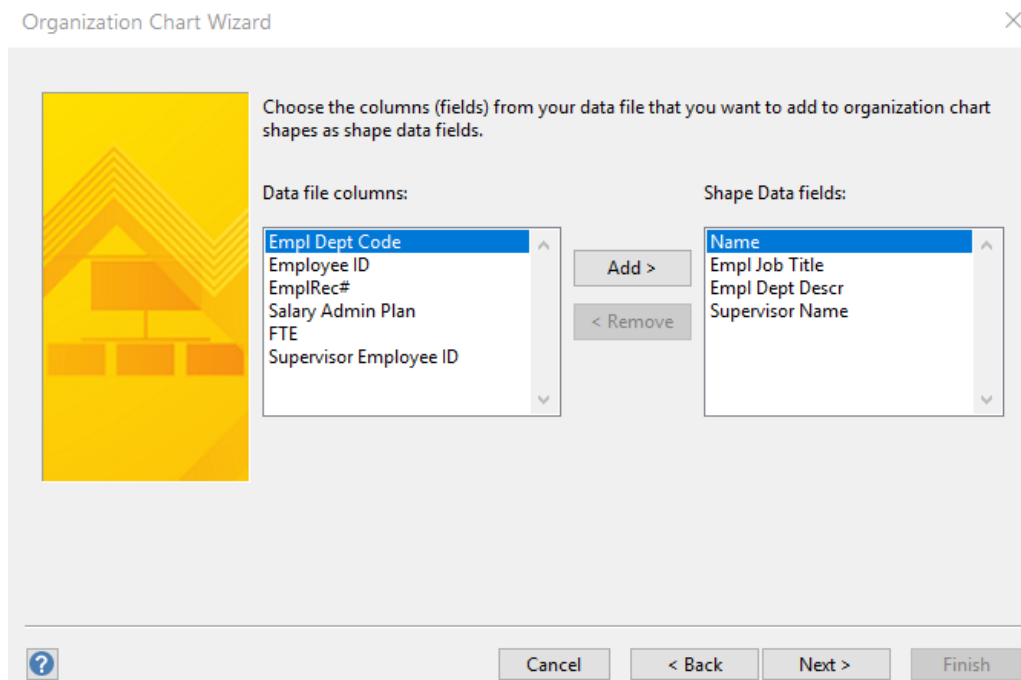


7. Choose columns from data file to display then select “Next”

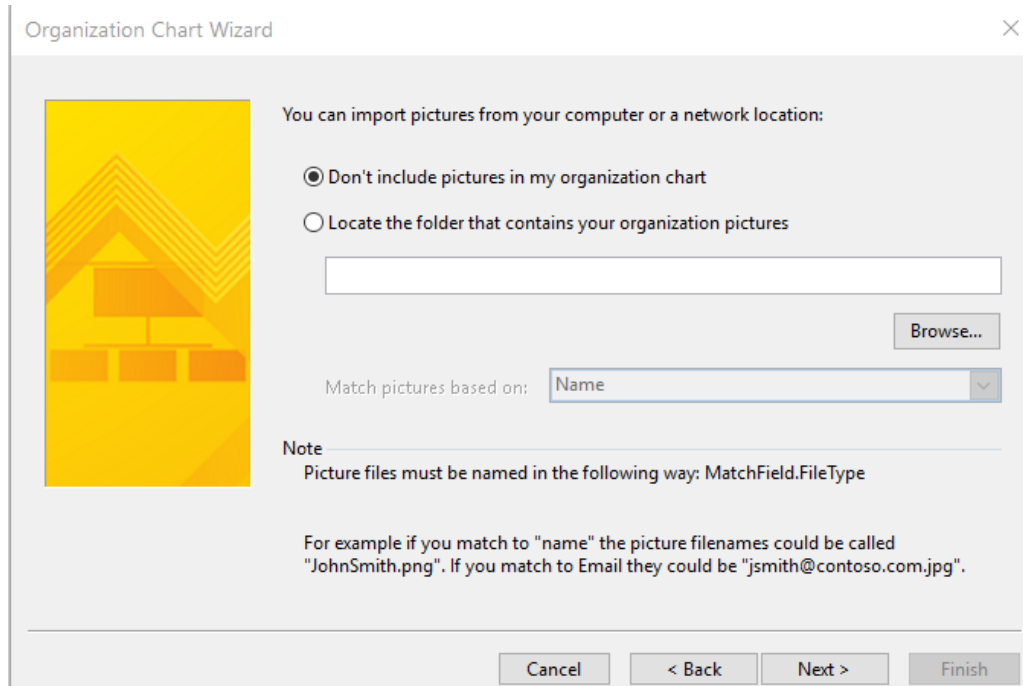
- a. Name
- b. Empl Job Title
- c. Empl Dept Descr
- d. Supervisor Name



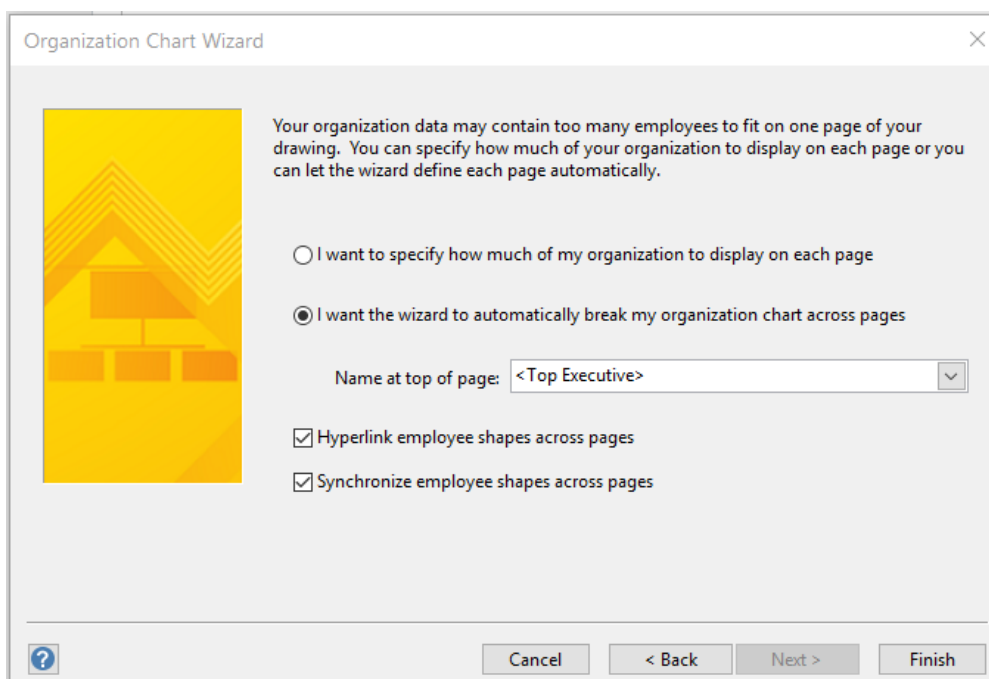
8. Choose columns from data file to add to organizational chart shapes as shape data files



9. Click "Next" then import pictures from your computer (optional), then select "Next"



10. Use wizard to automatically specify how you wish the organizational chart to display on each page



11. Then select “Finish”
12. Next, determine **Layout** then under **File** select **Export** or **Print**
13. To **Export**, create a PDF/XPS Document to be shared electronically
14. To **Print**, select **Page Setup**, under **Print zoom** located under the **Print Setup** tab
 - a. To reduce the drawing
 - i. Click **Adjust to** then type a number less than 100
-OR-
 - ii. Click **Fit to** then type 1 in the sheet(s) across and sheet(s) down boxes
15. Finally, select **Print**

FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk
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Policies and Directives

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