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 punctation 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"

Organization Chart Wizar	d	×
	I want to create my organization chart from: آnformation 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 (*.xlsx, *.xlsm, *.xlsb or *.xls), Microsoft Exchange Server, or ODBC-compliant database file. 	
	Cancel < Back Next > Finisi	h

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>

Organization Chart Wizard		\times
Choose organiz	the columns (fields) in your data file that contain the information that defin tion.	ies the
Name	Name	\sim
Report	s to: Supervisor Employee ID	\sim
First n (optic		\sim
Descrip The Re	ion ports To column (field) contains data that identifies the person's manager.	
0	Cancel < Back Next > F	inish

- 7. Choose columns from data file to display then select "Next"
 - a. Name
 - b. Empl Job Title
 - c. Empl Dept Descr
 - d. Supervisor Name

Human Resources

Organization Chart Wiza	ard		×
	Choose the columns (fields) from you	r data file that you want to display.	
	Data file columns: Empl Dept Code EmplRec# Salary Admin Plan FTE Supervisor Employee ID	Add > Displayed fields: Add > Empl Job Title Empl Dept Descr Supervisor Name	~
	Cance	Up Down el < Back Next >	Finish

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

Organization Chart Wiza	rd			\times
	Choose the columns (fields) f shapes as shape data fields.	from your data file that y	rou want to add to organizat	tion chart
	Data file columns: Empl Dept Code Employee ID EmplRec# Salary Admin Plan FTE Supervisor Employee ID	Add > < Remove	Shape Data fields: Name Empl Job Title Empl Dept Descr Supervisor Name	×
2		Cancel < B	lack Next >	Finish

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

Organization Chart Wiza	rd	×
	You can import pictures from your computer or a network location: On't include pictures in my organization chart Locate the folder that contains your organization pictures	
	Browse Match pictures based on: Name	•
	Note Picture files must be named in the following way: MatchField.FileType	
	For example if you match to "name" the picture filenames could be called "JohnSmith.png". If you match to Email they could be "jsmith@contoso.com.jpg".	
	Cancel < Back Next > Finis	h

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

Organization Chart Wiza	rd	\times
	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 o 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: <pre><top executive=""></top></pre> Image: Hyperlink employee shapes across pages Synchronize employee shapes across pages	~
0	Cancel < Back Next > Fi	nish

Human Resources

- 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 352-392-HELP <u>helpdesk.ufl.edu</u> Policies and Directives Classification & Compensation 352-273-2842 compensation@ufl.edu