

CHAPTER 13

ORGANISATION CHARTS

INFocus

WPL_V512

Organisation charts are an essential tool for documenting structures and hierarchies within organisations. Using the Visio Organisation Chart Shapes stencil, you can easily create drawings that depict these structures. They may include an overview of the corporate structure of your company or perhaps only the breakdown of a department.

In this session you will:

- ✓ learn how to create simple organisation charts
- ✓ learn how to add multiple shapes
- ✓ learn how to convert a shape
- ✓ learn how to change the layout of shapes
- ✓ learn how to change the spacing of shapes
- ✓ learn how to create a team
- ✓ learn how to change the order of shapes
- ✓ learn how to add a title
- ✓ learn how to add shape data
- ✓ learn how to create shape data fields
- ✓ learn how to add data fields to a master shape.

CREATING A SIMPLE ORGANISATION CHART

The easiest method for creating a simple organisation chart is to use the blank **Organisation Chart** template and place the position shapes as desired. By placing a superior

shape first, you can then create and automatically link the subordinate shapes by dropping them onto the centre of the superior shape. Two fields appear in each shape (Name and Title) which you can edit.

Try This Yourself:

Before starting this exercise ensure the Backstage is open...

- 1 Click on **New**, click on **Business** under **Template Categories**, click on **Organisation Chart** and click on **[Create]**

A new, blank drawing page will open with the **Organisation Chart Shapes** stencil in the **Shapes** window...

- 2 Drag the **Executive** shape to the top centre of the drawing page

The **Connecting Shapes** dialog box will open...

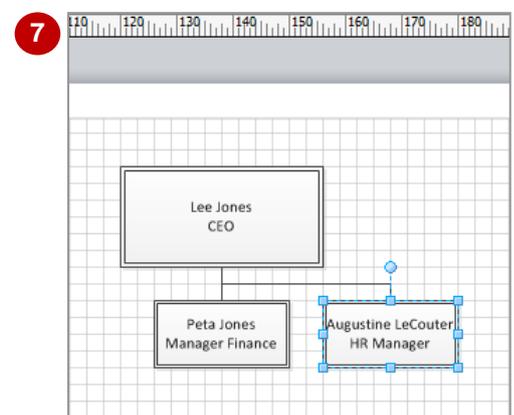
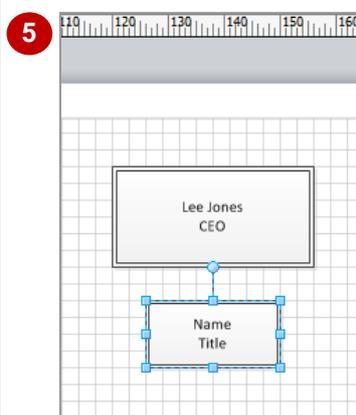
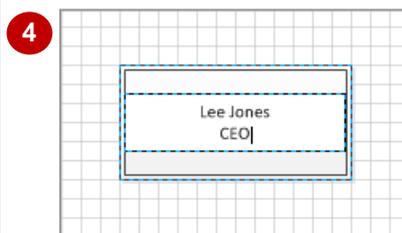
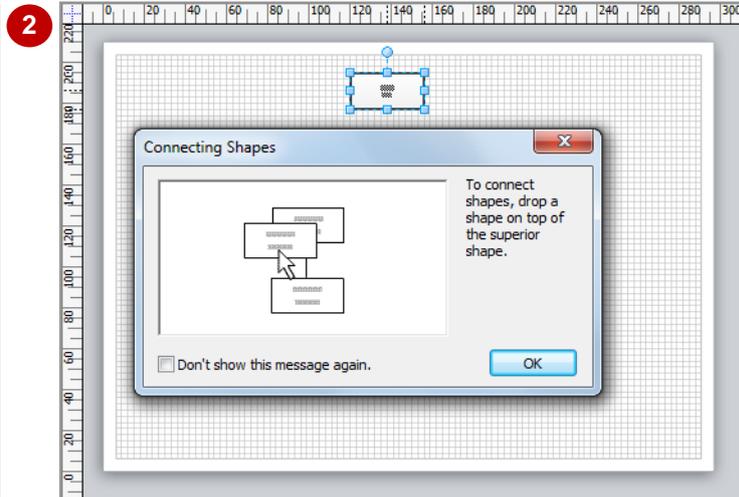
- 3 Read the information then click on **[OK]**

- 4 Type **Lee Jones**, press **[Enter]** and type **CEO**, then press **[Esc]**

- 5 Drag the **Manager** shape onto the **Executive** shape
- The shapes will connect automatically...

- 6 Type **Peta Jones**, press **[Enter]** and type **Manager Finance**, then press **[Esc]**

- 7 Repeat steps 5 and 6 to add another **Manager** shape: **Augustine LeCouter, HR Manager**



For Your Reference...

To create a simple organisation chart:

1. Click on **New**, click on **Business** under **Template Categories** and click on the **Organisation Chart** template
2. Place the superior shape on the page
3. Drag sub-ordinate shapes onto the superior shape

Handy to Know...

- You can change the size of all boxes in your organisation chart. To do this, click on **Display Options**  in the **Organisation Data** group on the **Org Chart** tab to open the **Options** dialog box. Change the values for **Width** and **Height** on the **Options** tab.

ADDING MULTIPLE SHAPES

Rather than adding multiple subordinate shapes one by one to the one superior shape, you can add them simultaneously using one of two shapes – the **Multiple shapes** shape or **Three**

positions shape. When you use the **Multiple shapes** shape, keep in mind that all of the resulting shapes will be of the same type, such as **Manager**.

Try This Yourself:

Same File

Continue using the previous file or open V512 Organisation Charts_1.vsd...

- 1 Drag the **Three positions** shape and drop it on top of **Peta Jones**

This will create three positions connected to the Manager.

You can also add more than three shapes simultaneously...

- 2 Drag the **Multiple shapes** shape and drop it on top of **Lee Jones**

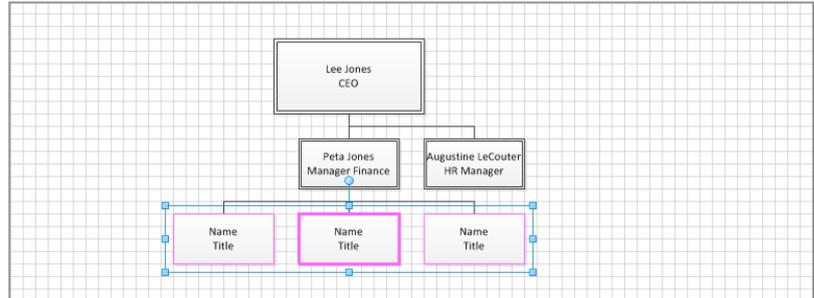
The Add Multiple Shapes dialog box will open. Let's add four more Managers...

- 3 Type **4** for **Number of shapes** and click on **Manager** under **Shape** to select it

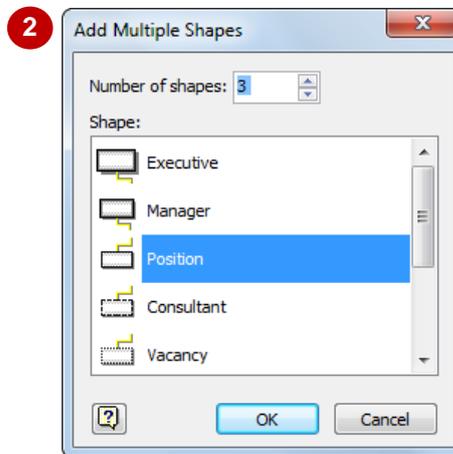
- 4 Click on **[OK]** to add the four new **Managers** adjacent to the two original Managers

- 5 Repeat steps **2** to **4** to add two **Positions** beneath the second **Manager**

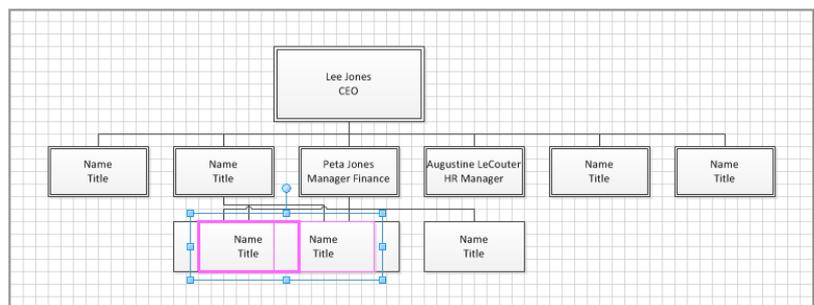
That's mucked up the layout but you'll fix it soon...



1



2



5

For Your Reference...

To **add multiple shapes**:

1. Drag the **Three positions** shape onto a shape to add three **Position** shapes or
 Drag the **Multiple shapes** shape onto a shape, type the **Number of shapes**, select the **Shape** type and click on **[OK]**

Handy to Know...

- When creating an organisation chart, you can add up to **50** shapes simultaneously, using the **Multiple shapes** shape.
- When you add multiple shapes simultaneously, you cannot enter their field text as you create the shapes.

CONVERTING A SHAPE

It is possible that you have added a shape that later changes type. For instance, a current position may become a vacancy or you may have used the wrong shape in the first instance.

Rather than having to go through the process of replacing the shape with a new one (including retyping the text, and repositioning and reformatting the shape), you can simply **convert** it.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *V512 Organisation Charts_2.vsd...*

1 Click on the first **Manager** shape

This should have been an Assistant...

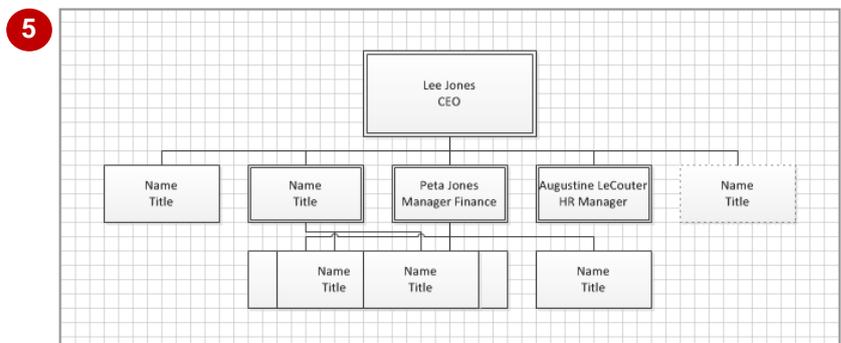
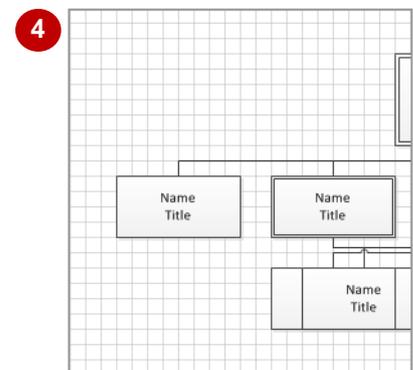
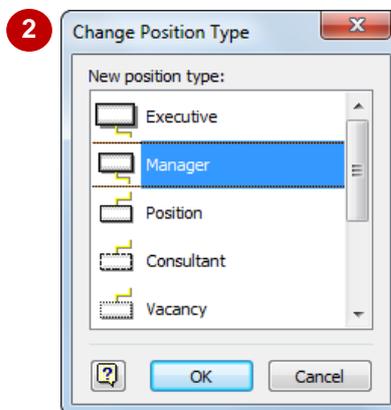
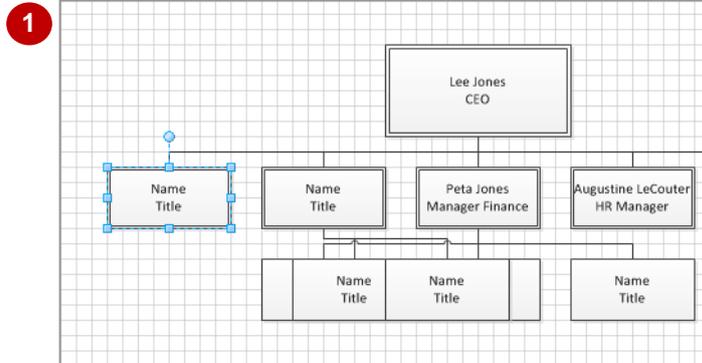
2 Click on the **Org Chart** tab, then click on **Change Position Type** in the **Arrange** group to open the **Change Position Type** dialog box

3 Click on **Assistant** in **New position type**, then click on [OK]

4 Click on a blank area of the page to deselect the **Assistant** shape

The border will change to a single line showing that it has been converted to an Assistant...

5 Repeat the above steps to convert the second-last **Manager** to **Vacancy**, then click on the last **Manager** and press **Del** to delete the shape



For Your Reference...

To **convert a shape**:

1. Select the shape
2. Click on **Change Position Type** in the **Arrange** group on the **Org Chart** tab
3. Click on the **New position type** required
4. Click on [OK]

Handy to Know...

- You can access the **Change Position Type** dialog box by right-clicking on a shape to display the shortcut menu, then selecting **Change Position Type**.

CHANGING THE LAYOUT OF SHAPES

As an organisation chart grows, it will typically become crowded and the page will never seem big enough. You can customise the layout of the shapes. There are three layout types: **horizontal**,

vertical and **side-by-side**. By default, shapes assume a horizontal centre layout but you can change this to suit your organisation chart. You can also **re-layout** a chart any time to fix layout issues.

Try This Yourself:

Same File

Continue using the previous file or open V512 Organisation Charts_3.vsd...

1 Ensure that the **Org Chart** tab of the ribbon is open

Currently we have several shapes overlapping each other. Let's fix this...

2 Click on **Re-Layout** in the **Arrange** group

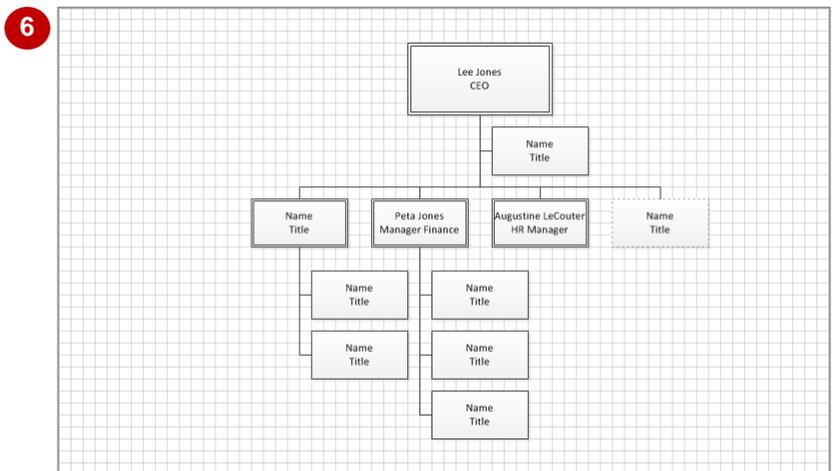
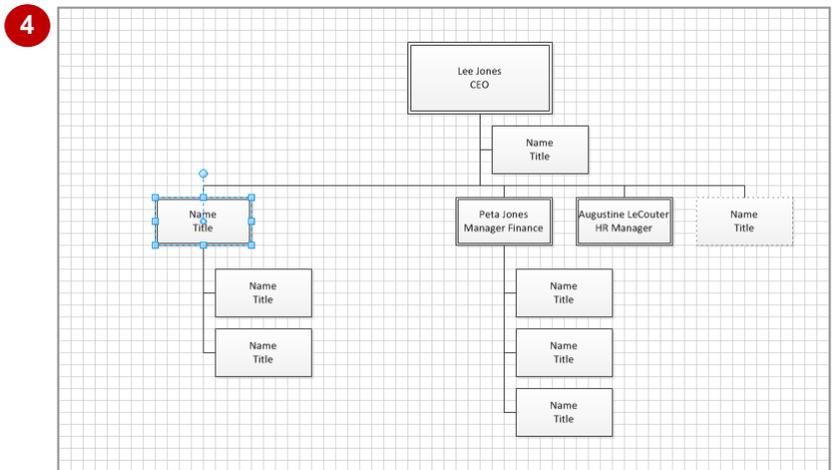
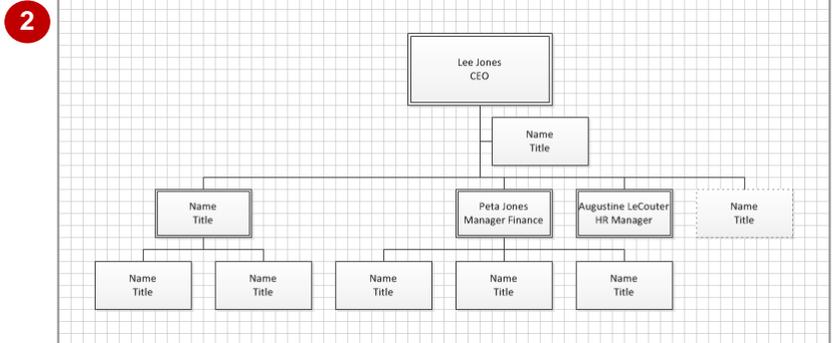
That looks better. But let's try a different layout...

3 Click on **Peta Jones** to select this manager

4 Click on **Vertical** in the **Layout** group to open the **Vertical Layout** gallery, then select **Left**

5 Repeat steps 3 and 4 to change the layout for the first manager to **Vertical Left**

6 Click outside the shapes to deselect the manager shape, then click on **Re-Layout** to quickly correct the overall layout



For Your Reference...

To **change** the **layout** of shapes:

1. Click on the superior shape
2. Click on **Horizontal**, **Vertical** or **Side by Side** in the **Layout** group on the **Org Chart** tab
3. Click on the required **Layout**

Handy to Know...

- Prior to selecting a layout option from one of the galleries, you must first select the superior shape.
- You can manually change the layout of the shapes. For instance, you might move an assistant out and up a bit so that you can move other shapes to gain extra space.

CHANGING THE SPACING OF SHAPES

Depending on the size of your organisation chart, you may like to adjust the spacing between the shapes. For instance, you may have a small organisation chart and want to make use of

available space on the page by increasing the distance between the shapes. Alternatively, you may have a large organisation chart and need to move shapes closer together so that they all fit.

Try This Yourself:

Same File

Continue using the previous file or open *V512 Organisation Charts_4.vsd...*

1 Click on **Change Spacing**  in the **Layout** group to open the **Spacing** dialog box

2 Click on **[OK]** to tighten up the spacing between all shapes on the current page

Yuck! But there may be times when you need it this tight...

3 Press **Ctrl + Z** to undo the change, then repeat step 1 to open the **Spacing** dialog box

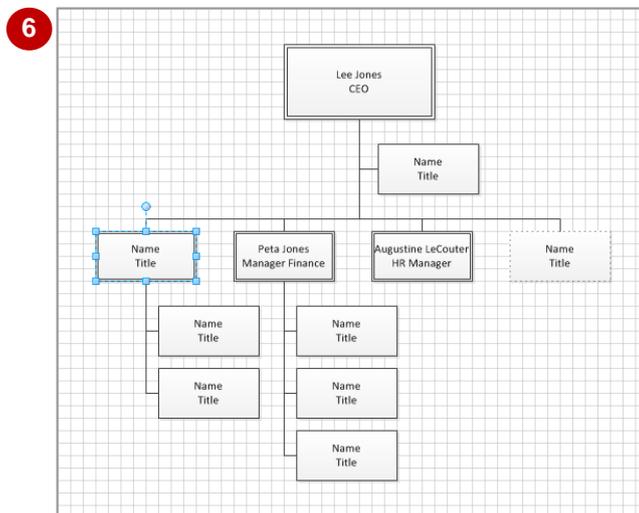
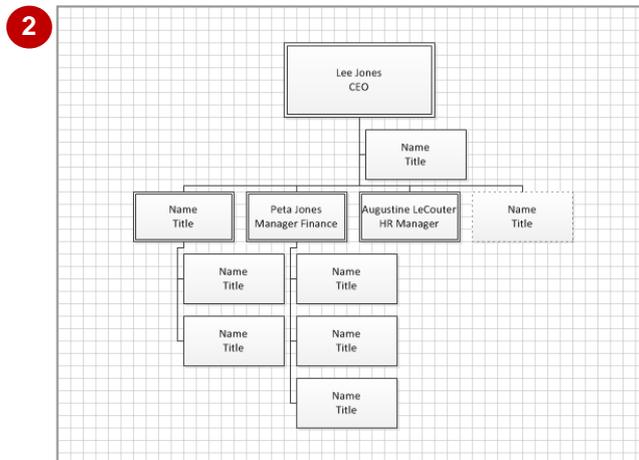
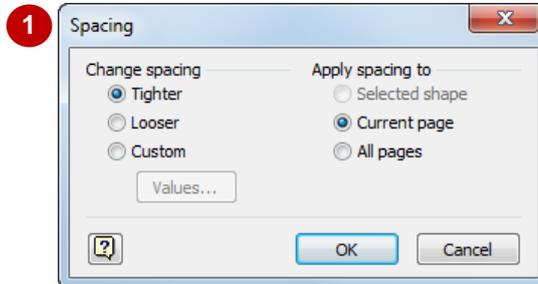
4 Click on **Looser** under **Change spacing** then click on **[OK]**

That's not looking too bad. You can also alter the spacing for selected shapes...

5 Click on **Peta Jones** then change the spacing to **Tighter**

This will tighten up the spacing between her sub-ordinates...

6 Repeat step 5 to tighten the spacing for the first **Manager** shape as well



For Your Reference...

To **change** the **spacing** of shapes:

1. Select the superior shape or no shape (to change all shapes)
2. Click on **Change Spacing**  in the **Layout** group on the **Org Chart** tab
3. Select the desired options and click on **[OK]**

Handy to Know...

- You can specify a custom spacing for shapes in an organisation chart. Click on **Change Spacing**  in the **Layout** group on the **Org Chart** tab, click on **Custom** then click on **[Values]**. Set the **Justification offset**, **Spacing between subordinates** and **Spacing from superior**, then click on **[OK]**.

CREATING A TEAM

When you create an organisation chart that depicts groups of people working in teams, such as a department in an organisation, you can identify the teams by using the **Team frame**

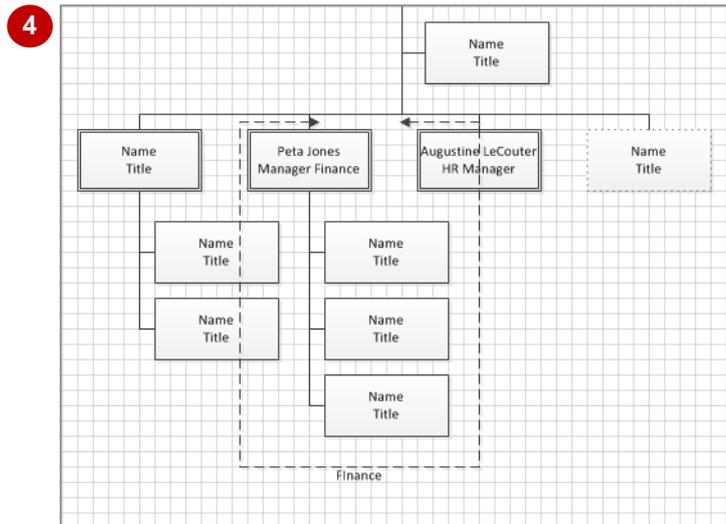
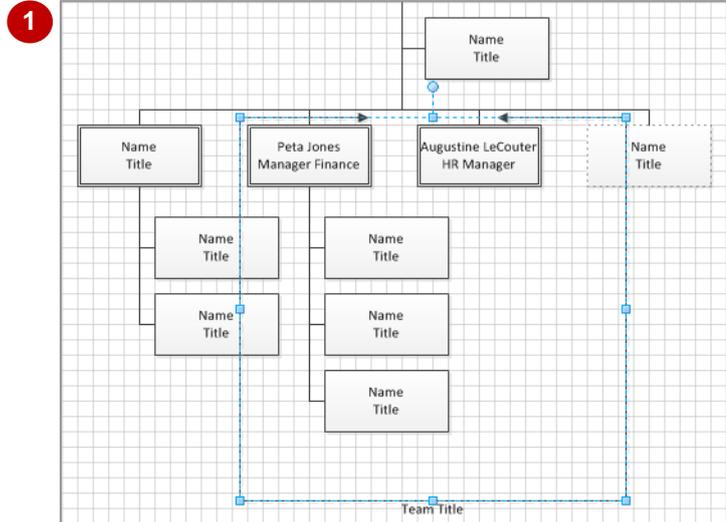
shape. This shape is simply an adjustable border that encompasses a number of shapes so that they can be identified as a collection. By giving the frame a title, the team is instantly recognisable.

Try This Yourself:

Same File

Continue using the previous file or open V512 Organisation Charts_5.vsd...

- 1 Drag the **Team frame** shape from the **Shapes** window and drop it as shown
We need to resize the frame to fit Peta Jones' team...
- 2 Drag the bottom centre selection handle up to make the team frame shorter
- 3 Drag the centre right handle to the left to make the frame narrower
Let's add a title to the frame...
- 4 With the team frame still selected, type **Finance** and press **Esc**
Currently the frame is overlapping other shapes, but you'll fix that soon



For Your Reference...

To **create** a **team**:

1. Place a **Team frame** shape on the drawing page
2. Resize the frame to fit the team
3. Type a title
4. Press **Esc**

Handy to Know...

- You can change the format of the frame by selecting the frame and then clicking on **Line**  on the **Home** tab and changing the desired options.
- You can apply a theme to an organisation chart just like any other drawing in Visio.

CHANGING THE ORDER OF SHAPES

By changing the order of shapes, you can adjust their position relative to other shapes. For instance, you may need to move shapes in an organisation chart if you decide later that you

want to list managers' names in alphabetical order. It is possible to move shapes up and down in a vertical layout and left and right in a horizontal layout.

Try This Yourself:

Same File

Continue using the previous file or open V512 Organisation Charts_6.vsd...

1 Click on **Peta Jones**
This manager and her team need to be located at the right end of the chart so that the team frame fits neatly...

2 Ensure that the **Org Chart** tab is open, then click on **Move Right/Down** in the **Arrange** group to move the team

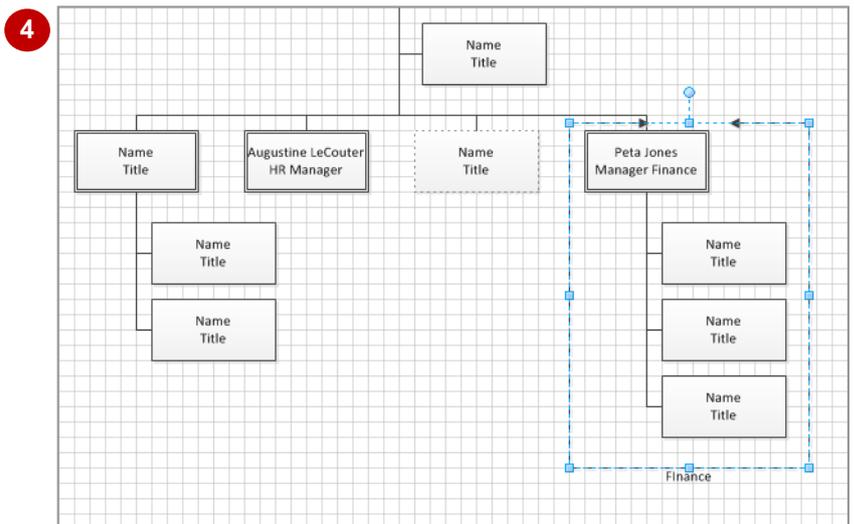
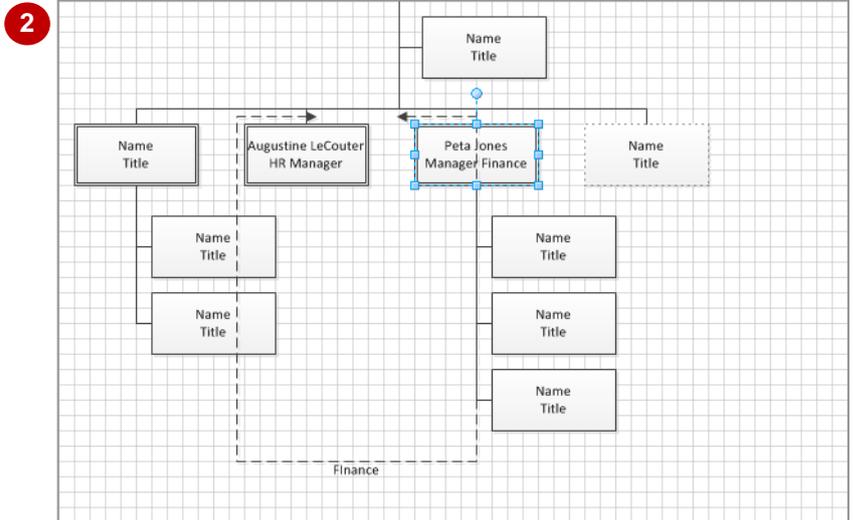
Notice that the frame has not moved...

3 Repeat step 2 to move the team to the last position in the chart

4 Click on the border of the **Team frame** shape, then use the **→** key to move the frame into position

You can also move shapes up and down...

5 Click on the bottom **Position** shape in the team to select it, then click on **Move Left/Up** twice to move it to the top of the team



For Your Reference...

To **change** the **order** of a shape:

1. Select the shape
2. Click on **Move Right/Down** or **Move Left/Up** in the **Arrange** group on the **Org Chart** tab

Handy to Know...

- If you have a really busy organisation chart, Visio lets you show or hide the subordinates of a selected superior shape. To do this, click on the superior shape and click on **Show/Hide Subordinates** in the **Arrange** group.

ADDING A TITLE

Visio provides two shapes that enable you to add a title to your organisation chart: the **Title/Date** shape and the **Title** shape. The **Title/Date** shape adds a placeholder for the company name and

automatically adds the current date. The **Title** shape adds a placeholder for the company name and the department name.

Try This Yourself:

Same
File

Continue using the previous file or open the file V512 Organisation Charts_7.vsd...

- 1 Place the **Title/Date** shape in the top left corner

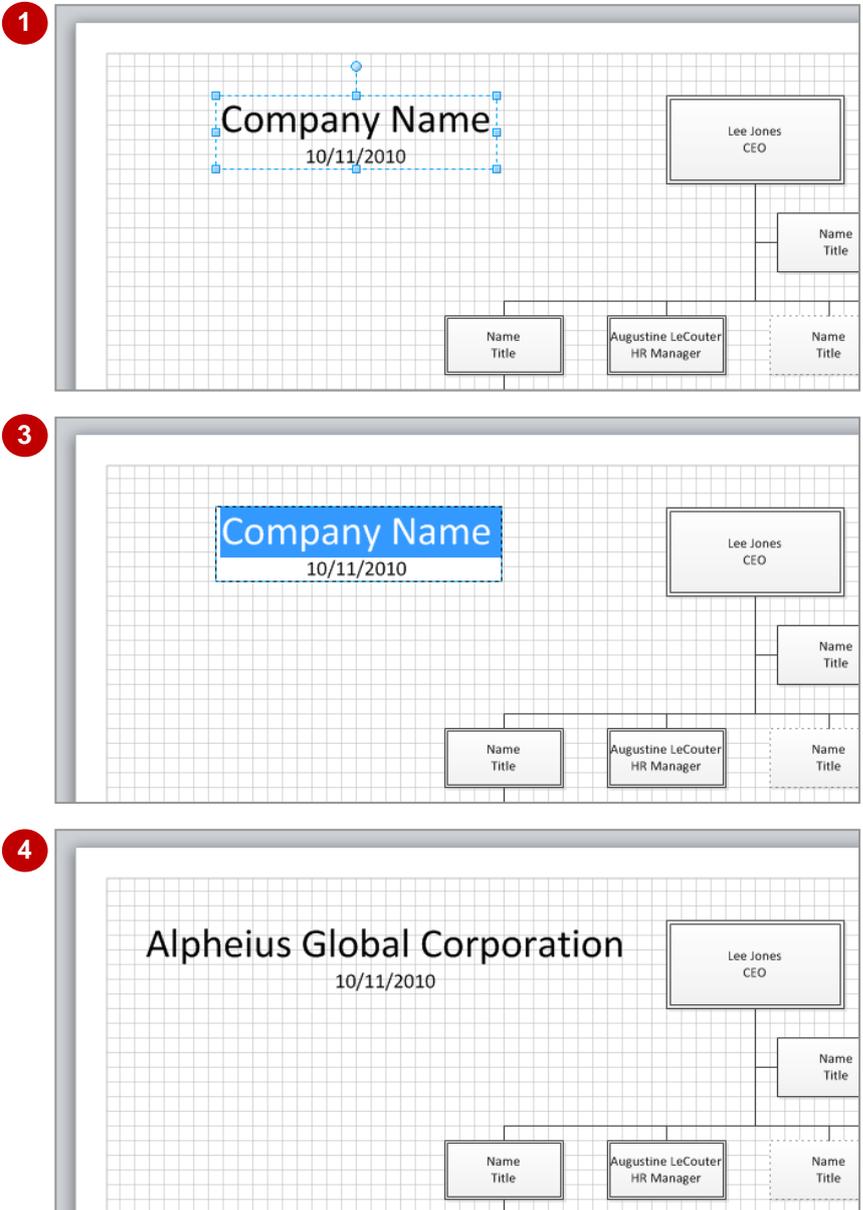
If you simply begin typing as you do normally to add text to a shape, you will lose the current date field...

- 2 Double-click on the **Title/Date** shape to place it in edit mode

- 3 Triple-click on the word **Company**

This will select just the first line of text...

- 4 Type **Alpheius Global Corporation** and then press **Esc** twice



For Your Reference...

To **add** a **title**:

1. Place either the **Title/Date** or **Title** shape on the drawing page
2. Type and format the text as desired
3. Press **Esc**

Handy to Know...

- Although the **Title/Date** and **Title** shapes create placeholders with two lines of text, you can easily select one of the lines and delete it if you don't want it. For instance, you may not want the department name appearing beneath the company name when using the **Title** shape.

ADDING SHAPE DATA

You can use **shape data** to store additional information relating to the people in your organisation chart. For instance, you might want to store telephone numbers or department names

with each person. **Shape data** typically does not appear in the shape itself but you can quickly access it when required.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *V512 Organisation Charts_8.vsd...*

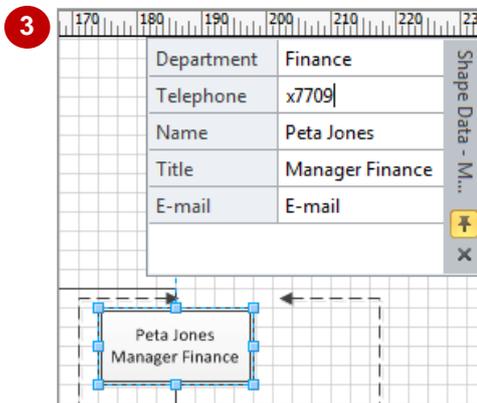
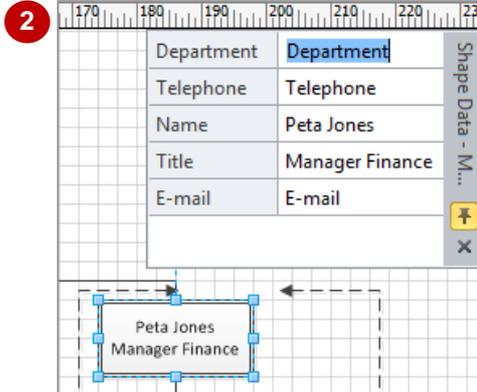
1 Click on the **Peta Jones** shape to select it

2 Click on the **View** tab, then click on **Task Panes**  in the **Show** group and select **Shape Data** to open the **Shape Data** pane

Notice that values already appear in the **Name** and **Title** data fields from when you created this shape. Notice also that Visio includes three other data fields for organisation chart shapes by default: **Department**, **Telephone** and **E-mail**. Let's add values to the first two of these...

3 Type **Finance** in **Department**, press **Tab**, then type **x7709** in **Telephone**

Keep the **Shape Data** pane open for the next exercise



For Your Reference...

To **add shape data**:

1. Select the shape
2. Click on the **View** tab, then click on **Task Panes**  and select **Shape Data**
3. Type values in the desired data fields

Handy to Know...

- You can view the shape data for a selected shape by ticking **Shape Data Window** in the **Show/Hide** group on the **Data** tab.
- You can display additional shape data fields in all shapes. To do this, click on **Display Options**  in the **Organisation Data** group and tick the desired fields on the **Fields** tab.

CREATING SHAPE DATA FIELDS

Visio includes five data fields for each organisation chart shape: **Department**, **Telephone**, **E-mail**, as well as **Name** and **Title** that appear automatically in the shape. If you

want to store extra information for your employees, such as date of birth, you will need to create a new data field. Note that when you create a new data field, it is created for the selected shape/s only.

Try This Yourself:

Same File

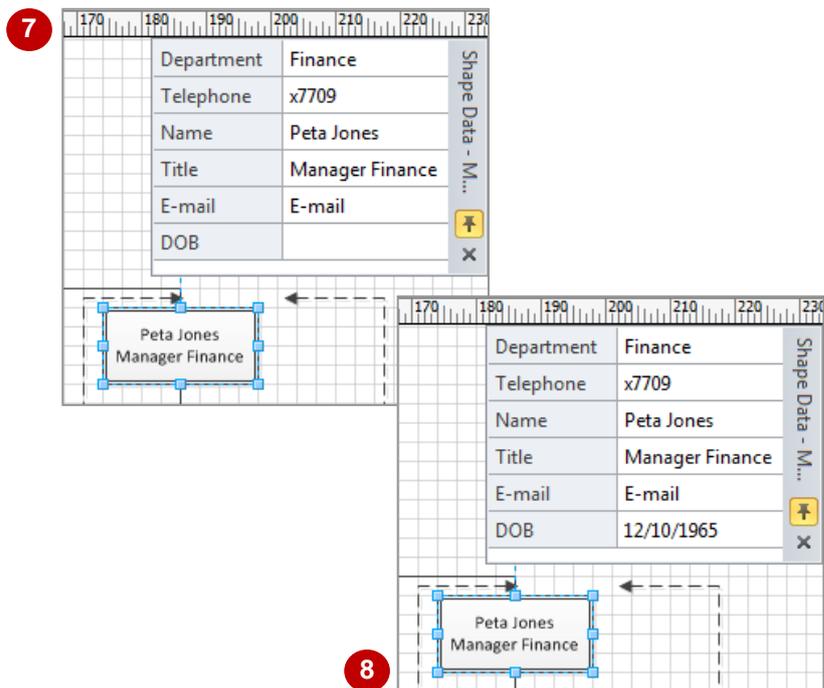
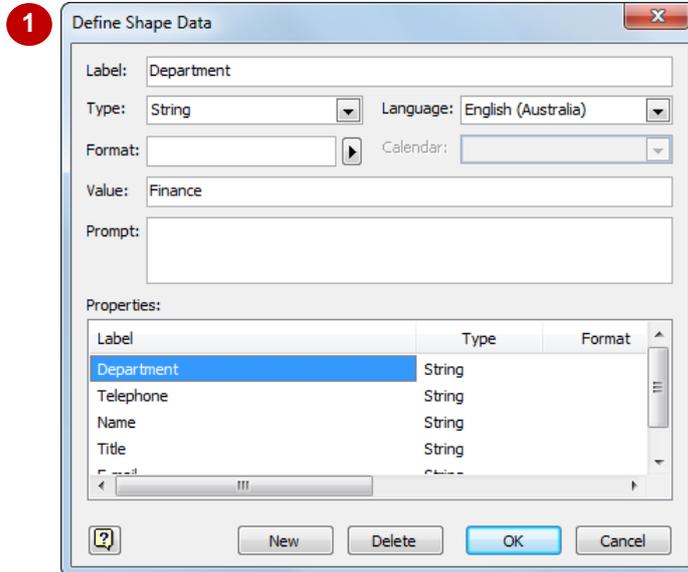
Continue using the previous file with this exercise, or open the file V512 Organisation Charts_9.vsd...

- 1 Right-click on the **Peta Jones** shape and select **Data > Define Shape Data** to open the **Define Shape Data** dialog box
- 2 Click on **[New]** to add a new property
- 3 Type **DOB** in **Label**
- 4 Click on the drop arrow for **Type** and select **Date**
- 5 Select an appropriate **Format**
- 6 Click in **Prompt** and type **Date of Birth**
- 7 Click on **[OK]**

The new property will be added to the Shape Data pane...

- 8 Type a date in **DOB** using the date format you specified

Clicking on the icon in **DOB** will display a calendar pane



For Your Reference...

To **create** a new **shape data field**:

1. Right-click on the shape
2. Select **Data > Define Shape Data**
3. Click on **[New]**
4. Type a **Label** and any other values
5. Click on **[OK]**

Handy to Know...

- To delete a custom data field for a shape, right-click on the shape and select **Data > Define Shape Data**. Click on the desired label under **Properties** and click on **[Delete]**.
- You can select multiple shapes prior to creating a new data field and it will be added to all of the selected shapes.

CREATING MASTER SHAPE DATA FIELDS

When you create shape data fields, they will only apply to the selected shape/s. If you want new data fields to appear every time you use a particular shape, then you must add them to a

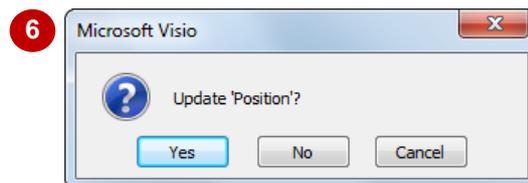
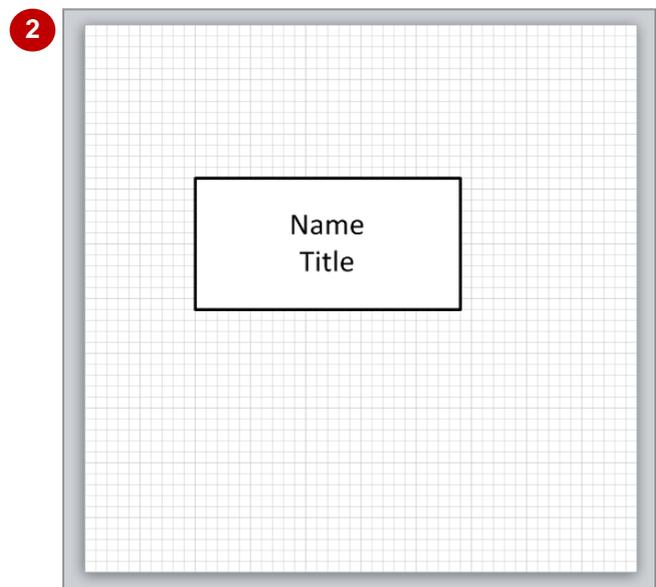
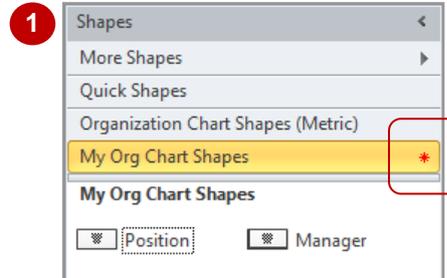
copy of the master shape in a custom stencil. For this exercise, we created a custom stencil (which is editable) and then copied the **Position** and **Manager** shapes into it.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *V512 Organisation Charts_10.vsd...*

- 1 Right-click on the title bar of the **My Org Chart Shapes** stencil and select **Edit Stencil**
The red asterisk shows that the stencil is in edit mode...
- 2 Right-click on the **Position** shape and select **Edit Master > Edit Master Shape**
The master shape will open in a new window...
- 3 Right-click on the shape, then select **Data > Define Shape Data** to open the **Define Shape Data** dialog box
- 4 Click on **[New]**, then type **DOB** in **Label**, select **Date** in **Type** and select an appropriate **Format**
- 5 Click on **[OK]** to add the new data field to the **Shape Data** pane
- 6 Click on the **View** tab, click on **Cascade**, then click on **close**  to close the master shape window – a message will display
- 7 Click on **[Yes]** to save the shape, click on the save icon  in the stencil's title bar, then repeat step 1 to turn off edit mode
- 8 Drag a **Position** shape onto the page – the **DOB** field will appear at the bottom of the **Shape Data** pane
- 9 Close the **Shape Data** pane



For Your Reference...

To add a data field to a custom stencil shape:

1. Right-click on the stencil and select **Edit Stencil**
2. Right-click on the shape and select **Edit Master > Edit Master Shape**
3. Right-click on the shape and select **Data > Define Shape Data**, then click on **[New]**

Handy to Know...

- After adding a data field to a master shape, the new data field will appear in the **Shape Data** pane (as long as it is open) whenever you drag a new instance of the shape onto the drawing page.
- You cannot modify shapes in Visio's built-in stencils – only those in custom stencils!