

## CHAPTER 14

**ORGANISATION CHART DATA****INFocus**

WPL\_V513

There are a number of handy tools available in Visio that enable you to work with and manipulate organisation chart data.

For instance, there are tools for exporting and importing data to and from other spreadsheet or database applications; maintaining multiple copies of the same organisation chart and automatically comparing different versions; and synchronising copies of one organisation chart within the same document so that copies of a shape are automatically updated with any changes.

These features help to minimise the risk of errors resulting from the duplication of information and reduce the labour involved in data conversion.

**In this session you will:**

- ✓ learn how to export data from an organisation chart
- ✓ learn how to create an organisation chart from a spreadsheet
- ✓ learn how to compare versions
- ✓ learn how to create synchronised copies of organisation chart shapes
- ✓ learn how to update synchronised copies.

# EXPORTING DATA

You can **export** the data from an organisation chart so that you can use it in other applications such as Excel. During the export, three additional columns of information are added to the default

data fields: **Unique\_ID** (a code that uniquely identifies each record), **Reports\_To** (records a person's manager) and **Master\_Shape** (classifies a person as a Manager, Position, Assistant etc).

## Try This Yourself:

**Open File**

Before starting this exercise you **MUST** open the file *V513 Org Chart Data\_1.vsd...*

**1**

Click on the **Org Chart** tab, click on **Export** in the **Organisation Data** group to open the **Export Organisational Data** dialog box, then navigate to the course files folder

**2**

Ensure that **Save as type** is set to **Microsoft Excel Workbooks (\*.xlsx....)**, then type **ExportData** in **File name**

**3**

Click on **[Save]**  
A message box will display showing the export was successful...

**4**

Click on **[OK]**  
Let's check the file in Excel...

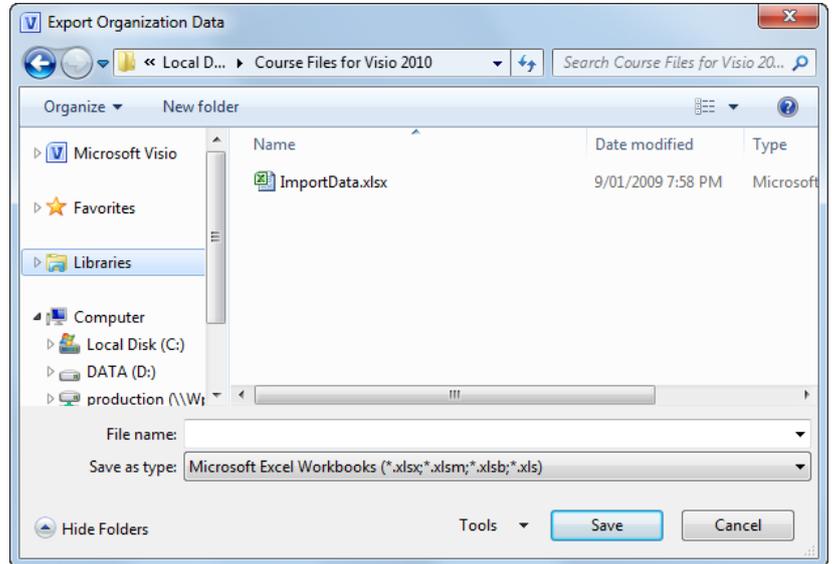
**5**

Start **Microsoft Excel**, then open the file **ExportData.xlsx** in the **Course Files for Visio 2010** folder

The values in the data fields are stored in separate columns in the spreadsheet. Notice that we had entered values in the two default data fields only – Name and Title...

**6**

Click on **Close** to close **Microsoft Excel**



**1**

	A	B	C	D	E	F	G	H
1	Unique_ID	Department	E-mail	Name	Telephone	Title	Reports_To	Master_Shape
2	ID1	Department	E-mail	Paul Senior	Telephone	CEO		0
3	ID2	Department	E-mail	Hank Silver	Telephone	Marketing Manager	ID1	1
4	ID3	Department	E-mail	Paul Borrowes	Telephone	Purchasing Manager	ID1	1
5	ID4	Department	E-mail	Penny Wise	Telephone	Financial Controller	ID1	1
6	ID5	Department	E-mail	Gary Brown	Telephone	Public Relations	ID1	1
7	ID6	Department	E-mail	Cherie Wilson	Telephone	IT Manager	ID1	1
8	ID7	Department	E-mail	Sue Smith	Telephone	Help Desk Supervisor	ID6	2
9	ID8	Department	E-mail	Gary Reynolds	Telephone	PC Support	ID6	2
10	ID9	Department	E-mail	Frank Childs	Telephone	Network Supervisor	ID6	2
11	ID10	Department	E-mail	Helen Mears	Telephone	IT Training Coordinator	ID6	2
12	ID11	Department	E-mail	Fiona McDonald	Telephone	Art & Printing Services	ID1	1
13	ID12	Department	E-mail	Pete Gould	Telephone	Executive Assistant	ID1	5
14								
15								

**5**

As well as being able to export organisation chart data as an Excel Workbook, you can also export it as a tab delimited .TXT file or a comma delimited .CSV file. The values in each data field are separated by tabs or commas, respectively, with these two file types.

## For Your Reference...

To **export organisation chart data**:

1. Click on **Export** in the **Organisation Data** group on the **Org Chart** tab
2. Type in a **File name**, select a **Save in** location and a **Save as type** format
3. Click on **[Save]**

## Handy to Know...

- When exporting organisation chart data, the **Unique\_ID** column numbers the shapes consecutively, in the order of placement. If a shape is deleted from the org chart, the ID number associated with that shape is not reassigned, so you may notice numbers missing in the **Unique\_ID** column.

# CREATING CHARTS FROM SPREADSHEETS

If the information you require for your organisation chart already exists in a different format, why would you want to re-enter it in Microsoft Visio? For instance, personnel data

may exist in a spreadsheet or database format within the Human Resources data stores. You can **import** Microsoft Excel or text files, MS Exchange Server or ODBC-compliant data.

## Try This Yourself:

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

**1** Select **New > Business > Organisation Chart Wizard** to start the **Organisation Chart Wizard**

Let's import an Excel file, part of which is shown here...

**2** Ensure **Information that's already stored...** is selected, then click on **[Next]**

**3** Ensure **A text, Organisation Plus...** is selected, then click on **[Next]**

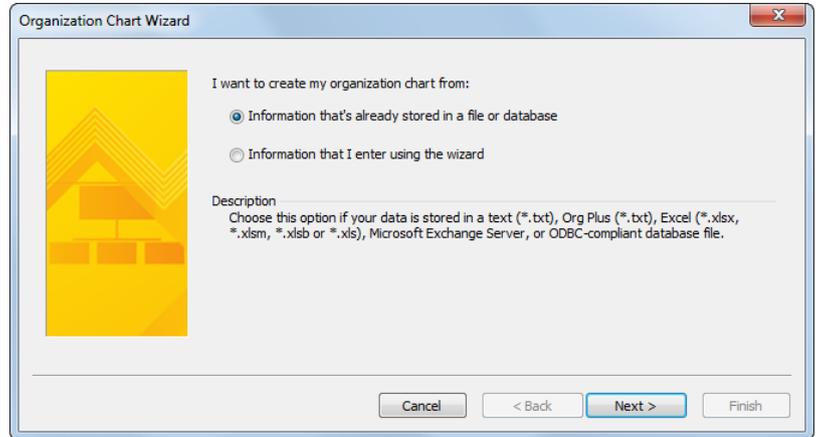
**4** Click on **[Browse]**, double-click on **ImportData.xlsx** in the course files folder, then click on **[Next]**

**5** Ensure that **Name** is selected in **Name**, select **Supervisor** in **Reports\_To**, then click on **[Next]**

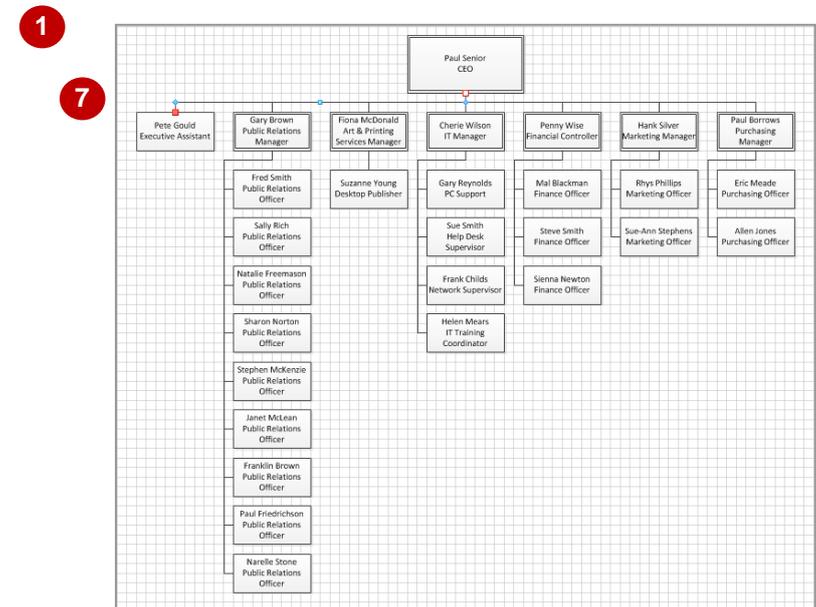
The Excel file has a Name and Supervisor column, but no First Name column...

**6** Ensure that only **Name** and **Title** are listed in **Displayed fields** (only these fields will display in Visio), then click on **[Next]**

**7** List all columns except for **Supervisor** under **Shape Data fields**, then click on **[Next]** and **[Finish]** to create the chart



	A	B	C	D	E	F
1	Department	Name	Supervisor	E-mail	Telephone	Title
2	Executive	Paul Senior		psenior@alpheiusge.com	x9878	CEO
3	Executive	Pete Gould	Paul Senior	pgould@alpheiusge.com	x1456	Executive Assistant
4	Information Technology	Cherie Wilson	Paul Senior	cwilson@alpheiusge.com	x7584	IT Manager
5	Information Technology	Helen Mears	Cherie Wilson	hmears@alpheiusge.com	x7412	IT Training Coordinator
6	Information Technology	Sue Smith	Cherie Wilson	ssmith@alpheiusge.com	x7463	Help Desk Supervisor
7	Information Technology	Frank Childs	Cherie Wilson	fchilds@alpheiusge.com	x7452	Network Supervisor
8	Information Technology	Gary Reynolds	Cherie Wilson	greynolds@alpheiusge.com	x7812	PC Support
9	Public Relations	Gary Brown	Paul Senior	gbrown@alpheiusge.com	x2114	Public Relations Manager



## For Your Reference...

To use the **Organisation Chart Wizard**:

1. Select **File > New > Business > Organisation Chart Wizard (Metric)**
2. Complete the steps in the wizard
3. Click on **[Finish]**

## Handy to Know...

- If you are importing a spreadsheet with a lot of columns, you may only want to include specific columns as shape data fields. To do this, list the desired columns in **Shape Data fields** in the **Organisation Chart Wizard**.
- You can use **Find** (Home tab) to find a person in a large organisation chart.

# COMPARING VERSIONS

Visio lets you compare two versions of an organisation chart and then print a report of the differences between them (for example, to document historical changes). You can then use

the printed report to manually update the older version with the new changes. You need to be able to access both copies of the file to make the comparisons.

## Try This Yourself:

### Open File

Before starting this exercise you **MUST** open the file *V513 Org Chart Data\_2.vsd...*

- 1 Click on the **Org Chart** tab, then click on **Compare**  in the **Organisation Data** group

The *Compare Organisation Data* dialog box will open...

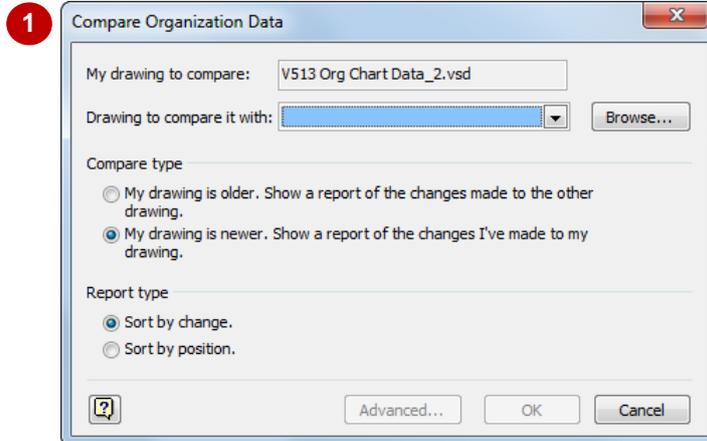
- 2 Click on **[Browse]** to open the **File Open** dialog box, then navigate to the course files folder

- 3 Click on **V513 Org Chart Data\_3.vsd**, then click on **[Open]**

- 4 Ensure that **My drawing is newer...** is selected in **Compare type**, then click on **[OK]**

Visio will display the *Comparison report* in a browser window. It shows that three positions have been deleted, one position has been added and a title has changed in the newer version of the organisation chart...

- 5 Click on **Close**  to close the browser window and return to Visio



Comparison, sorted by action

-	Modification	ID	Change description
-	Added	Janet McLean	-
Count	1	-	-
-	Changed	Fiona McDonald	Property (Title) has been changed to (Art & Printing Services Manager) from (Printing Services Manager).
Count	1	-	-
-	Deleted	Sarah Murphy	-
-	Deleted	Neryss Wemyss	-
-	Deleted	Mary Noone	-
Count	3	-	-

4

## For Your Reference...

To **create a comparison report**:

1. Open one of the two versions to compare
2. Click on **Compare**  in the **Organisation Data** group on the **Org Chart** tab
3. Select the document options
4. Click on **[OK]**

## Handy to Know...

- Once you have created an organisation chart comparison report, you can update the outdated drawing by manually applying the listed changes.

# CREATING SYNCHRONISED COPIES

The **Synchronised Copies** feature of Visio lets you create multiple copies of an organisation chart, or parts of it, within the same document. For instance, you may have an overview chart on

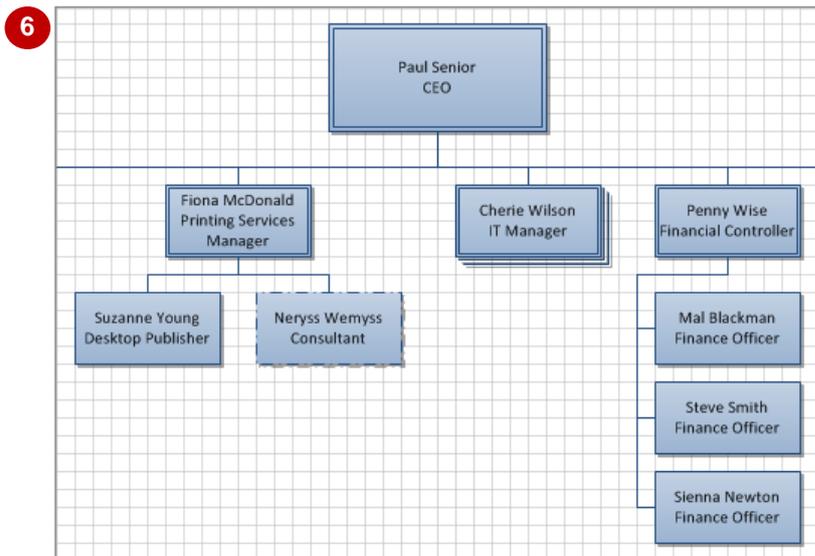
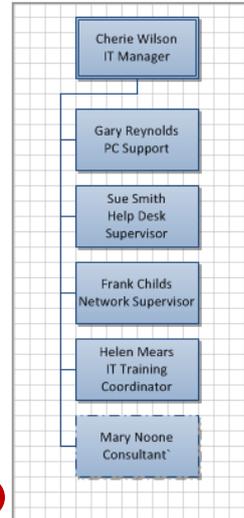
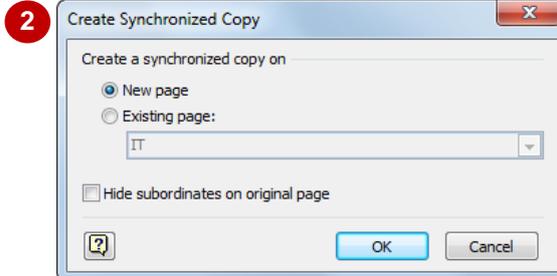
one page and then detail departments on subsequent pages. By creating synchronised copies of a shape, changes to that shape will automatically update copies of it on other pages.

## Try This Yourself:

Open  
File

Before starting this exercise you **MUST** open the file *V513 Org Chart Data\_4.vsd...*

- 1 Click on the **Cherie Wilson** shape to select it  
We will make a synchronised copy of the IT department on the second page...
- 2 Click on the **Org Chart** tab, then click on **Create Synchronised Copy**  in the **Synchronise** group  
The Create Synchronised Copy dialog box will open...
- 3 Click on **Existing page** and ensure it is set to **IT**
- 4 Click on **Hide subordinates on original page** to select it
- 5 Click on **[OK]**  
The selected shape plus its subordinates will appear on the IT page...
- 6 Click on the **AGC** page tab to move back to that page  
Notice that the Cherie Wilson shape has a different border now to indicate that the subordinates are hidden



## For Your Reference...

To **create synchronised copies**:

1. Select the shape(s) to copy
2. Click on **Create Synchronised Copy**  in the **Synchronise** group on the **Org Chart** tab
3. Select the required options and click on **[OK]**

## Handy to Know...

- You can create synchronised copies of more than one shape (and its subordinates) simultaneously. To do this, press **[Shift]** and click on each shape that you want to copy, then complete the synchronisation process.

# SYNCHRONISING RELATIONSHIPS

When you create synchronised copies of shapes, changes that you make to the text contained within those shapes (or the properties) are updated immediately in the synchronised copies.

But, changes such as moving the shape or adding a new subordinate will not be applied to the synchronised copies. You need to update the relationships between copies for this to occur.

## Try This Yourself:

**Same File**

Continue using the previous file or open V513 Org Chart Data\_5.vsd...

**1** Ensure that the **AGC** page is currently open

**2** Click on the **Cherie Wilson** shape, then click on **Show/Hide Subordinates**  in the **Arrange** group

Let's add another subordinate to this shape and then update the synchronised copy...

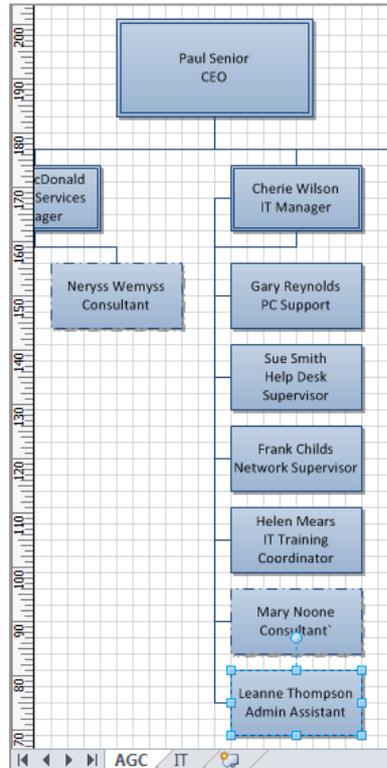
**3** Drag a **Position** shape onto **Cherie Wilson** and type **Leanne Thompson**, press **Enter** and type **Admin Assistant**

**4** Click on the **IT** page tab to see the synchronised copy

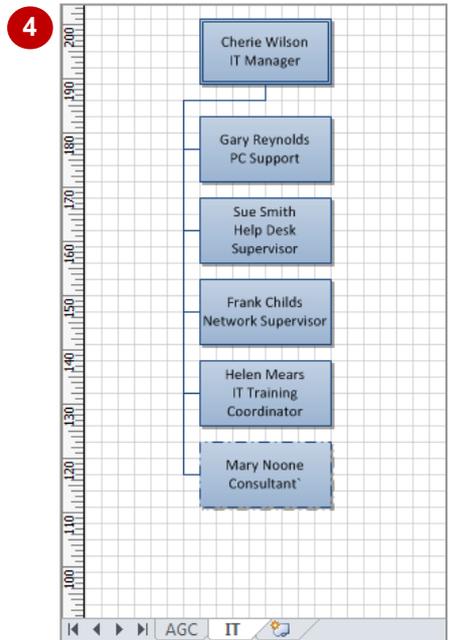
It will not show the new position yet...

**5** Click on the **Cherie Wilson** shape, then click on **Expand Subordinates**  in the **Synchronise** group

The new position will be revealed

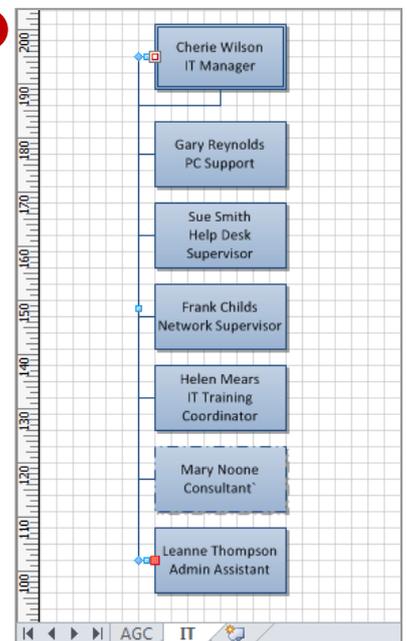


**3**



**4**

**5**



## For Your Reference...

To **update synchronised relationships**:

1. Make the desired change to the main chart
2. Open the synchronised chart
3. Click on the top-most position
4. Click on **Expand Subordinates**  in the **Synchronise** group

## Handy to Know...

- You need to update the relationships of synchronised shapes before exporting data, as shapes that have been moved will have different superiors on different pages and will therefore be treated as different people.