

Microsoft Visio

Organization Charts



Organization Chart

An Organization chart is a diagram that shows the relationship among people and groups in an organization. It is a quick view for you to see who is your boss, who are your co-workers, who are your sub-ordinates, and an overview of the organization's structure.

Reasons to use Visio to do Organization charts:

- You can add pictures to organization chart shapes.
- You can store information for each employee in the Custom Properties window.
- You can automatically create an organization chart from data by using the Organization Chart Wizard.

Summary

Organization Chart

1. Template
2. Adding the first shape
3. Forming the hierarchy
4. Organization Toolbar
5. Moving Shapes

Template

1. Open Visio and choose the **Create new drawing:** radio button and highlight **Choose drawing type...**
2. Click on **OK**.
3. Under the **Solutions** tab, choose the **Organization Chart** Category.
4. Highlight a **Drawing type** and choose **OK**.
5. You will now have access to the Organization Chart's toolbar and menu commands.
6. Your page layout will automatically switch to the landscape orientation.

Adding the first shape

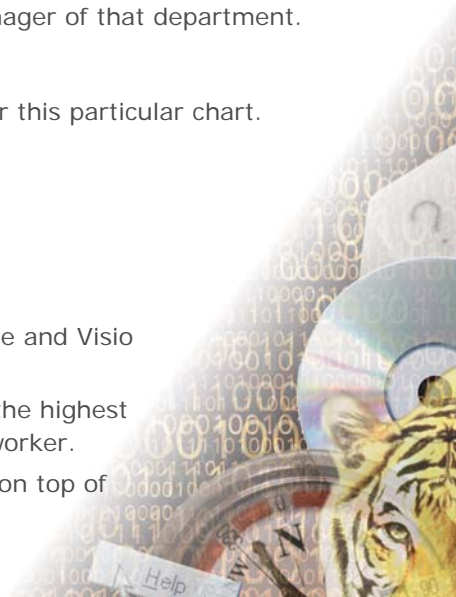
The first shape in your chart should be the highest level of employee that this chart will be representing. So for a department you would start with the manager of that department.

1. Choose the **Organization Chart Shapes** stencil.
2. Find the shape representing the highest level of employee for this particular chart.
3. Drag the shape to the top, center part of the drawing page.

Forming the hierarchy

To add co-workers and subordinates work from the top down:

1. Drag the **position** shapes on top of the highest level of shape and Visio will automatically form a connector below the highest shape.
2. To form a co-worker, drop another position shape on top of the highest level and now you will have two workers below the highest worker.
3. To add workers below the 2 workers, simply drop the shape on top of the one the new worker reports to.



Organization Toolbar

Use the Organization chart toolbar to change the layout of your chart. You need to select the highest level and then choose the different layout options by using the drop down arrow next to the icons.



Moving shapes

You can simply choose a shape and move it by dragging it. All of the connectors will follow the shape as you move it.

The Insert Menu

You can insert many items to the shapes in your chart. You may want to add a picture of the employee, a comment, equation, hyperlink or even a graph. Highlight the shape you want the insert to appear on and choose the correct insert menu item. Some examples are:

- Choose the **Picture** options and browse to the picture you want to insert.
- To enter text simply double click on the shape and type
- Choose **Comment** and type in your comment. To view the comments, hover your mouse over the shape.
- Choose **Hyperlink** and browse to the URL you want linked to the shape.

