Steps to create a data set viable to use as a data source for importing for use in Visio Organizational Diagrammes

Step One – the Required Fields

In any data source, be it a Microsoft Excel Workbook, a Microsoft Access Database, a Microsoft SQL Database, a Microsoft SharePoint List, a Microsoft Exchange Directory, or any other OLEDB or ODBC-Compliant data source, there MUST exist two fields which, with their data, equate to:

A) The Employee's unique name, or identifier, and

B) The Employee's Manager's (Supervisor's, Reporting Person's) name, or identifier.

In the case of an Excel Workbook worksheet, these two fields would be two distinct columns of data.

In the case of a Database, these would be two distinct fields in a table, query or view.

In the case of a SharePoint list, these would be two unique fields in the list.

Step Two – The Required Column / Field Names

If the data source is an Excel Workbook Worksheet, Row 1 MUST be the Column Headers. There is absolutely NO naming convention required for the Column Headers. Typically the Names Employee and Manager are used, however they can be any names that make sense, as long as the field (i.e. Column) names are unique and will map to the A) Name of the Employee, and B) The Name of the Person they Report To.

Step Three – Proper Spelling, Capitalization, Punctuation, and Use of Names

As an example, if the Person being Reported TO has the Name "Joseph Jones", and that name is used in the Employee Field for that Manager, then for each employee in that Employee's Manager field MUST show as reporting to "Joseph Jones". This can NOT be listed as "Joe Jones", "Josef Jones", "Joseph Q. Jones", "Jones, Joseph" or any other permutation of the name. There MUST be an EXACT match between the name used for the Manager in that Manager's Employee Field and the name used in the Manager field for each of the Employees reporting to that Manager under that name. This includes proper spelling, capitalization, punctuation, and use of the name.

Step Four – Structure

If an individual is listed as having no Manager, it is assumed by Visio that the individual is the very top of the reporting structure and will appear as the top position / box in the Org Chart. ABSOLUTELY EVERY EMPLOYEE under that top person MUST report to someone to be included in the organization. That person that they report to MUST report to someone, etc., etc., etc., all the way from the lowest position up to the top level person. Every Manager MUST be listed in the Employee field.

Visio does NOT handle "dotted line" reporting. You can manually drop in Dotted line reports, however they are not understood by the automation or data source at all.

Step Five – The Source Data, The Wizard, and Re-Linking.

Once the Visio Organizational Chart Wizard has completed the creation of the Organization Chart, FROM THAT POINT FORWARD, the diagram knows NOTHING about the source data file that was used in the creation of the diagramme. The Wizard reads the data ONE TIME, uses that data to generate the diagramme and then is no longer associated in any manner with the diagramme.

In order for the data changes in the data source to be recognized by the Visio diagram, the Visio diagram:
A) needs to have been created utilizing Visio 2007 Professional, or Visio 2010 Professional or Premium editions
B) needs to use the Data Linking to 1) Link the Data to the Diagramme as a whole, then 2) link the individual records in the external data table to the appropriate SmartShape symbols. This second step must be accomplished for every page in the Organizational Diagramme.

Step Six – What Updating Will and Will NOT Update

Once the re-linking has been completed, if any of the data fields in the source data file are changed and saved, then they will be reflected in the external data table in the Visio diagramme.

Note that this applies to Shape Data and Data Graphics. The following scenarios will NOT result in proper updating of the Visio diagramme.

1. If a new employee is added to the data set, and the attached external data table is refreshed, a new box will NOT be automatically added to the diagramme. A new record will show in the external data table and will show as an unlinked record. The Visio diagramme creator / editor will need to add the SmartShape to the diagramme at the appropriate location and then link the data record with that SmartShape symbol.
2. If an employee is removed from the data set, and the attached external data table is refreshed, the box in the diagramme will NOT be automatically deleted from the diagramme. Instead, since the external data table no longer contains that record subsequent to the data refresh, the SmartShape that was linked to that record will have lost its record connection. That SmartShape symbol will need to be manually deleted from the diagramme.
3. If an employee was reporting to Manager "A" in the structure of the diagramme, and the data record changes such that the employee now reports to Manager "B", the SmartShape symbol will update its Shape Data fields, however the SmartShape WILL NOT RELOCATE to show the change in reporting structure. The Visio diagramme creator / editor must manually relocate the SmartShape to the new location and ensure that it is properly glued / connected in the diagramme.