



[OrgChart for VISIO – Getting Started Documentation]

Organization Charts Made Easy!

Visio 2010 is an excellent drawing package for data-diagrams of all kinds. But, as you look to move beyond the tedious, time-intensive, manual creating and updating of organization charts you will find this add-in a truly remarkable help.

Why Use OrgChart for Visio?

OrgChart for Visio will save you hours of time in creating and maintaining Organizational Diagrams. You will have an immediate ROI and will actually save your company money in overall diagramming costs!

Using a data source such as an Excel spreadsheet you will find OrgChart for Visio the easiest, fastest way to create intelligent, refreshable organization charts.

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2012

OfficeWork Software

Product Development Team



[ORGCHART FOR VISIO – INSTALLATION GUIDE]

A brief guide to installing OfficeWork Software's OrgChart for Visio 2010. NOTE: Installation of this add-in for Visio requires Microsoft Visio 2010 Professional Edition or Microsoft Visio 2010 Premium Edition



OrgChart for Visio Installation Guide

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The Media

Download

1. If you download the Installation Package from the OrgChart for Visio Web Site, you will copy to your Windows Desktop the .ZIP file containing the Installation Package.
2. Create a folder. You can name this folder any convenient name such as "OC4VInstall".
3. Move the .ZIP file to the folder you have just created.
4. Unzip the .ZIP file to this same folder.

CD Media

1. Create a folder anywhere you desire on your local machine. You can name this folder any convenient name such as "OC4VInstall".
2. If you obtained a box product of the OrgChart for Visio with installation CD, you will copy the .ZIP file containing the Installation Package found on the root directory of the CD to your Windows Desktop.
3. Move the .ZIP file to the folder you have just created.
4. Unzip the .ZIP file to this same folder.

Before the Install – Select 32-bit or 64-bit

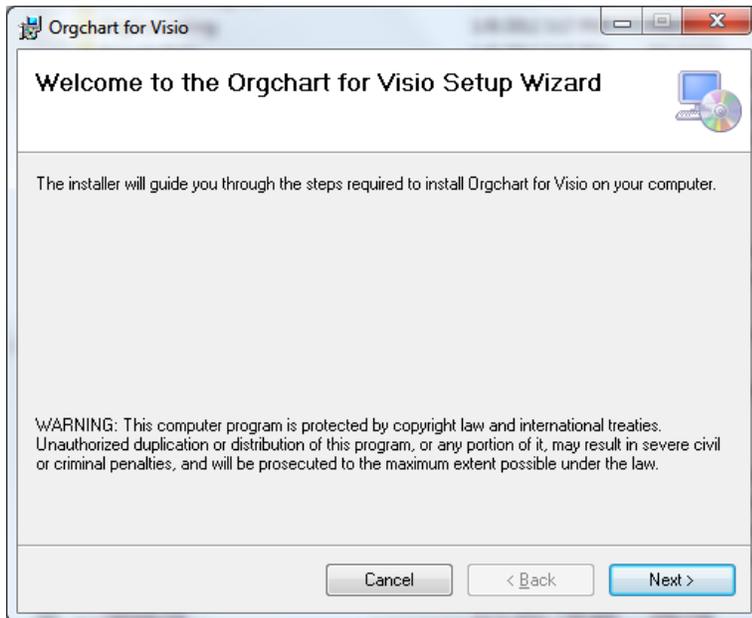
This is very important. You should see two folders unzipped. One for a 32-bit system, the other for a 64-bit system. Open the folder matching your computer's bit configuration. If you are uncertain about your computer's bit configuration open the windows explorer and right click on My Computer, selecting the Properties tab. This will tell you whether your computer is 32 or 64 bit.

Begin the Install

You will now find two additional files in your new folder; a file labeled Setup.exe, and a file labeled Orgchart for Visio Setup.msi.

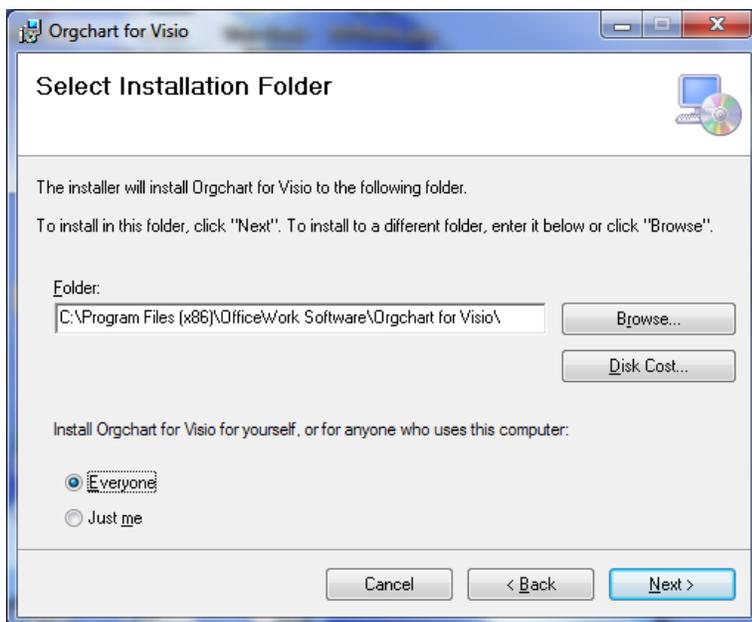
1. Double-click on the Setup.EXE file in the folder where you have placed the .ZIP file and unzipped the file. This action will launch the Orgchart for Visio Installation Wizard.

Install Screen One



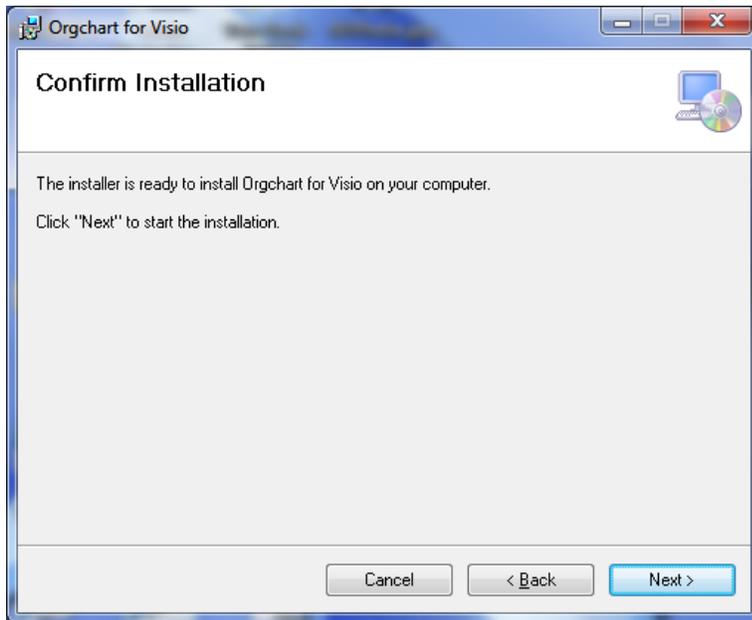
2. Left-click the Next > Command Button to advance to the next screen of the Orgchart for Visio Installation Wizard.

Install Screen Two



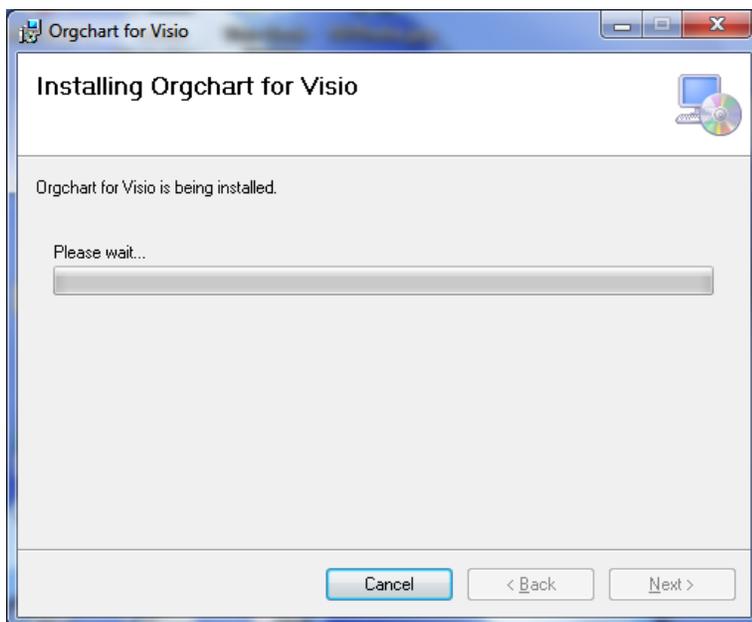
3. Ensure that the Radio Button near the bottom of the Screen labeled "Everyone" is selected, then Left-click the Next > Command Button to advance to the next screen of the Orgchart for Visio Installation Wizard.

Install Screen Three



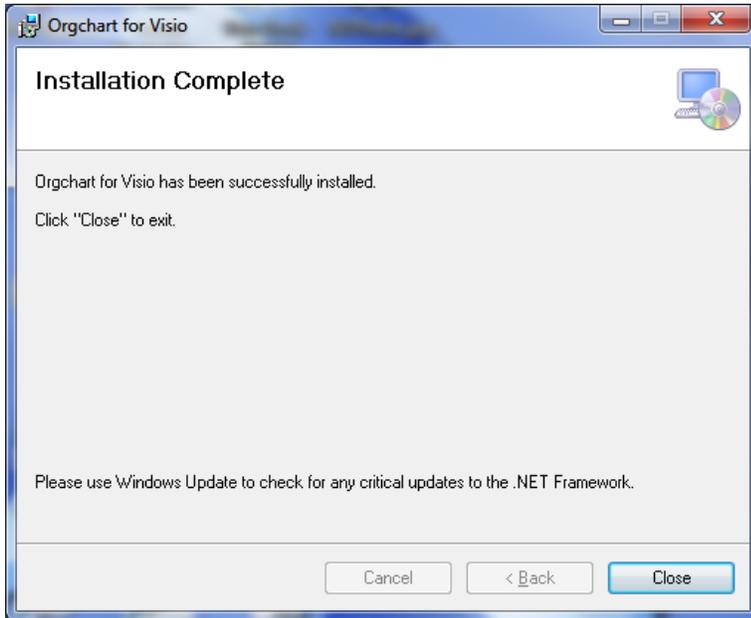
4. Left-click the Next > Command Button to advance to the next screen of the Orgchart for Visio Installation Wizard.

Install Screen Four



5. A Progress Bar will keep you apprised of the progress that OrgChart for Visio is making during the Installation Process. If, during the process you encounter an Alert dialog asking for your permission to proceed with the installation, Left-click the Yes or Agree Command Button to continue. Left-click the Next > Command Button to advance to the next screen of the Orgchart for Visio Installation Wizard.

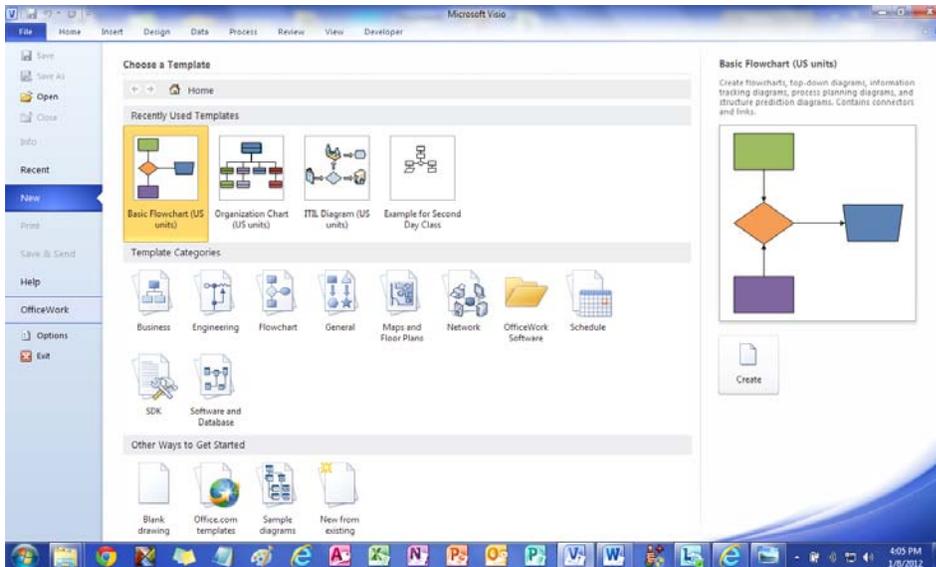
Install Screen Five



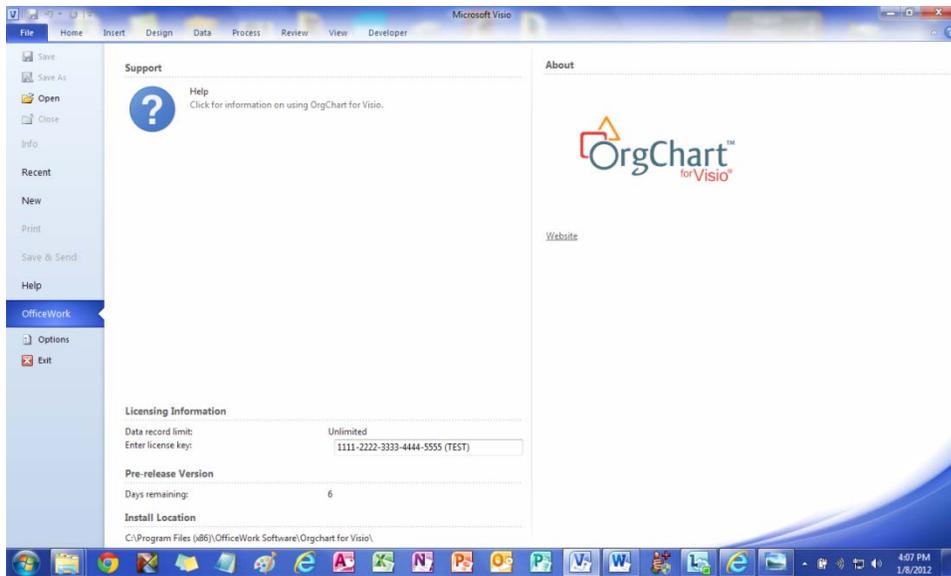
6. When the OrgChart for Visio Installation has successfully completed the Installation, you will see the final screen of the Wizard as illustrated above. Left-click the Close Command Button to close the Installation Wizard and return you to the Windows Desktop.

Enter your OrgChart for Visio License Key

1. Launch Microsoft Visio 2010 Professional or Microsoft Visio 2010 Premium as you normally would.
2. Left-click the Dark Blue File Ribbon Tab to enter Visio 2010's Backstage View.



3. In the Backstage view, locate the OfficeWork Software Item at the Left (Menu) Area of the Backstage view and Left-click to select the OfficeWork Menu item.



4. Enter your License Key into the Text Box to the Right of the Label “Enter License Key:”
5. Return to the New Area of the Backstage Area by Left-clicking on the “New” Item (Menu) at the Left of the Backstage area.

Installation Complete

2012

OfficeWork Software

Product Development Team



[ORGCHART FOR VISIO – GETTING STARTED GUIDE]

A brief guide to getting started with OfficeWork Software's OrgChart for Visio 2010. NOTE: use of this add-in for Visio requires Microsoft Visio 2010 Professional Edition or Microsoft Visio 2010 Premium Edition



OrgChart for Visio Getting Started Guide

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Beginning a New Organizational Diagram with OrgChart for Visio

Launch Visio 2010 Professional Edition or Visio 2010 Premium Edition

From The Windows Desktop

1. If you have a Shortcut to Visio 2010 on your Windows Desktop as a Desktop Icon, launch Visio 2010 by using your Left-mouse button and Double-clicking on the Visio 2010 Icon

From the Windows Start Menu

1. Locate the Windows Gem in the Lower-Left-Hand-Corner of your Windows Desktop.
2. Left-click to select the Windows Gem. This action will display the Windows Start Menu
3. Select “All Programs” from the Windows Start Menu
4. Scroll down through the listing of all Programs that are installed on your local machine and locate the item listed as “Microsoft Office”
5. Left-click to expand the Microsoft Office item and locate the sub-item listed as “Microsoft Visio 2010”
6. Left-click to select the Microsoft Visio 2010 Item. This action will launch Microsoft Visio 2010.

The Backstage View

Once you have launched Microsoft Visio 2010 you will be, by default, viewing the “Backstage View”. An example of this is shown in the Illustration below (Figure 1).

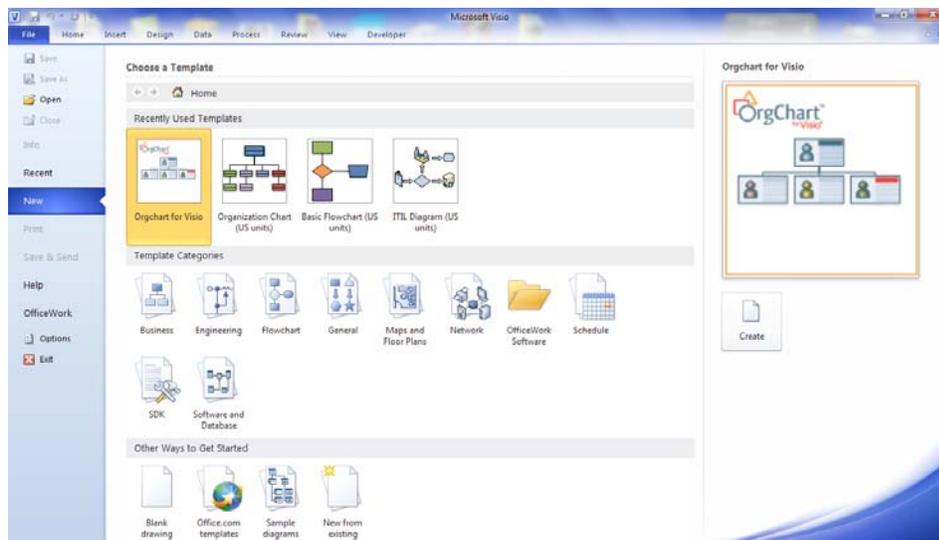


Figure 1 – Backstage View

Note that in the main body of the Backstage View, there are Three general Sections: (1) Recently Used Templates, (2) Template Categories, and (3) Other Ways to Get Started.

If you have used OrgChart for Visio previously, an Icon for OrgChart for Visio may be displayed in the Previously Used Templates area. To begin a new OrgChart using the OrgChart for Visio Add-In, simply Double-click, using your Left-Mouse-Button, on the OrgChart for Visio Icon in the Previously Used Templates Area. This action will begin a new Organizational Diagram based upon the OrgChart for Visio Template and you will next be viewing the Visio Diagramming Environment with a new diagram based on the OrgChart for Visio template and the OrgChart for Visio Add-In active.

If you have NOT previously created an OrgChart using the OrgChart for Visio Add-In, you will not find an Icon for the OrgChart for Visio Add-In in the Recently Used Templates. You WILL however, regardless of whether you have used the OrgChart for Visio Add-In before or not, find a Folder in the Template Categories area of the Backstage View.

Using your Left-Mouse-Button, Left-Click on the Folder listed as “OfficeWork Software” in the Template Categories Area. This action will change the Backstage View to display the Available Solutions from OfficeWork Software. The Add-In currently available is the OrgChart for Visio solution. Your Backstage View will look similar to the Illustration as shown in Figure 2 Below.

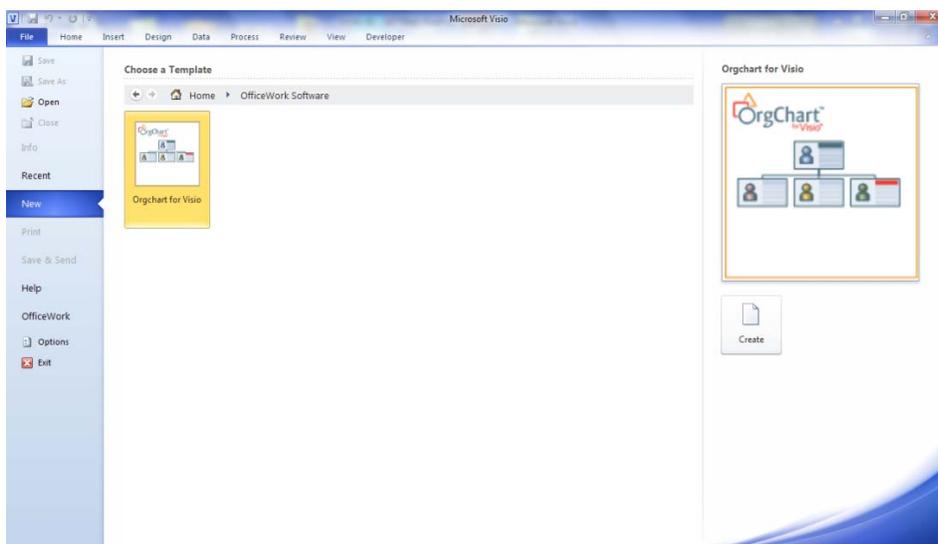


Figure 2 – Backstage View in OfficeWork Software Solution Folder

To begin a new OrgChart using the OrgChart for Visio Add-In, simply Double-click, using your Left-Mouse-Button, on the OrgChart for Visio Icon in the Choose a Templates Area. This action will begin a new Organizational Diagram based upon the OrgChart for Visio Template and you will next be viewing the Visio Diagramming Environment with a new diagram based on the OrgChart for Visio template and the OrgChart for Visio Add-In active.

The OrgChart for Visio Diagramming Environment

IMPORTANT NOTE 1:

If you do not see the Document Stencil Item displayed at the left of the Diagramming Environment, take the following steps (This will need to be accomplished ONLY one time and Visio will remember to have this available from this point forward whenever you use Visio):

1. Left-click on the File Ribbon Tab to navigate to the Backstage View.
2. In the Backstage View, Locate and select the Options Item at the Left of the Backstage View. This action will display the Visio Options Dialog.
3. Left-click on the Advanced Item at the Left of the Options Dialog. This action will display the Advanced Page of the Options Dialog.
4. Scroll to the bottom of the Advanced Page and locate the General Area, and the “Run in developer mode” Check-box item.
5. Click to check the Run in Developer mode Check-Box or ensure that it is already checked.
6. Left-click the OK Command Button in the Lower-Right of the Options Dialog to confirm your selection, close the dialog and return to the Visio Diagramming Environment.
7. Select the Developer Tab of the Visio Ribbon.
8. Locate the Show / Hide Area of the Developer Ribbon Tab.
9. Ensure that the Document Stencil Item is checked.
10. Return to the OrgChart Tab on the Visio Ribbon

IMPORTANT NOTE 2:

If the Shape Data Window is not currently being displayed in the Visio Environment, take the following steps to ensure its display:

1. Left-click to select the Data Tab in the Visio Ribbon.
2. Locate the Show / Hide Area of the Data Tab and ensure that the Shape Data Window Check-Box is currently checked.
3. Return to the OrgChart Tab of the Visio Ribbon.

The Visio 2010 OrgChart Ribbon Tab

As you enter the Visio Diagramming Environment a blank Visio Diagram will be displayed. Above the diagramming surface a collection of Visio Ribbon Tabs will be displayed. The Default Ribbon Tab that will be active is the OrgChart for Visio “OrgChart” Ribbon Tab. This is illustrated in Figure 3, below.

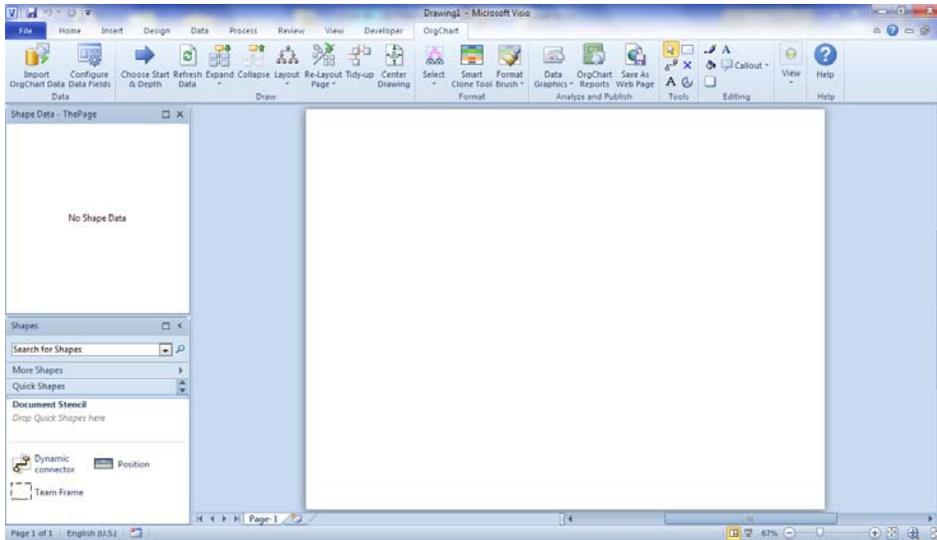


Figure 3 – The Visio Diagramming Environment with the OrgChart Ribbon Tab active

The Visio 2010 OrgChart for Visio Ribbon is a unified, easy to navigate dashboard for creating and maintaining Visio OrgChart diagrams created with the OrgChart for Visio Add-In.

In general practice, when creating an OrgChart, you will work from Left to Right, completing the tasks to display and format the hierarchal structure of the Organizational Diagram.

Let's look at the overall OrgChart Ribbon Tab. This is illustrated in Figure 4 below:

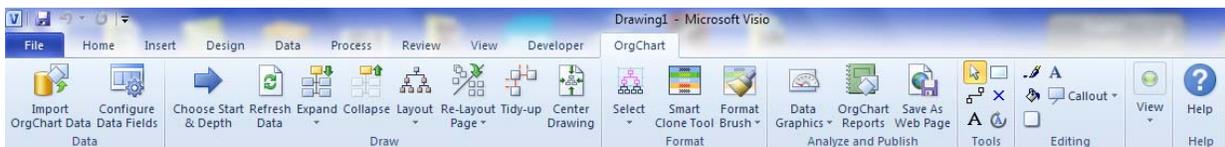


Figure 4 – The OrgChart Ribbon Tab

Note the Areas on the OrgChart Ribbon Tab. These are (working Left to Right): (1) Data, (2) Draw, (3) Format, (4) Analyze and Publish, (5) Tools, (6) Editing, (7) View, and (8) Help.

Even though it IS possible to manually create a hierarchal Organizational Diagram by using simple drag-and-drop techniques, OrgChart for Visio is a highly intelligent, data-driven, Automation-enhanced diagramming tool as an Add-in to Visio 2010 Professional and Premium. Therefore utilizing an External Data Source is the optimal method for creating an Organizational Diagram. We will be stepping through this data-driven process in this Getting Started Guide.

The First Area, at the left, on the OrgChart is the Data Area. This area consists of two tools: Import OrgChart Data, and Configure Data Fields. We will begin by Importing the Data we will use to create our Organizational Diagram. Left-Click to Select the Import OrgChart Data Item.

Import OrgChart Data

This action will display the Data Selector dialog. The first screen of the Data Selector Dialog / Wizard is shown in Figure 5 below:

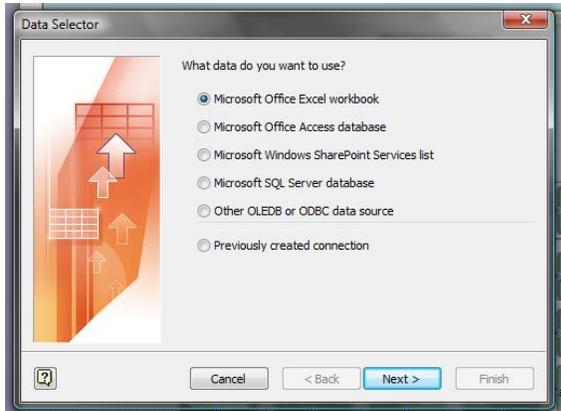


Figure 5 – Data Selector Screen 1

The first question that requires a selection is “What data do you want to use?”. The potential choices are (1) a Microsoft Office Excel workbook, (2) a Microsoft Office Access database, (3) a Microsoft Windows SharePoint Services list, (4) a Microsoft SQL Server database, and (5) any Other OLEDB or ODBC data source. In the case of this demonstration, the Excel workbook will be selected. Left-Clicking on the Next> Command Button advances to the next screen of the Data Selector Wizard. Screen 2 of the Data Selector Wizard is shown in Figure 6 below:

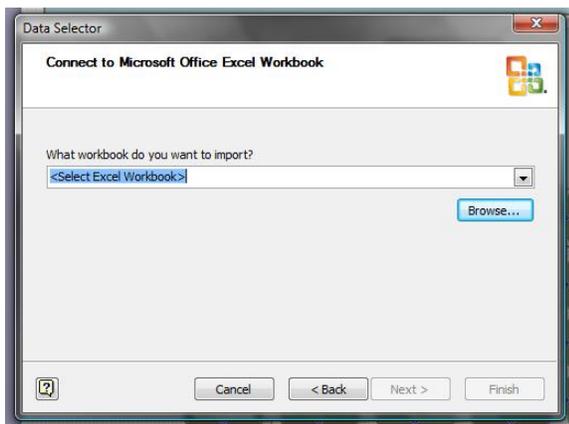


Figure 6 – Screen 2 of the Data Selector Wizard

The next step is to browse to the desired data source. Left-Clicking the Browse... Command Button displays a File Dialog allowing the user to select the desired file from the network file system.

In this Getting Started Guide, we will be using a Microsoft Excel Workbook as our desired Data Source. In order for Visio to understand the Excel Worksheet as a viable Data Source, the data source will need to

comply with two rules: (1) Row One in the Worksheet MUST contain the Column Header Labels. An example of this is illustrated below in Figure 7 below:

	A	B	C	D	E	F	G	H	I	J
Record	Employee					Is		Dotted-Line	Dotted-Line	Dotted-Line
1	Number	Number	Employee Name	Title	Position Type	Assistant	Primary Manager	Manager 1	Manager 2	Manager 3
2	00001	CZ2012CA0001	Jossef Goldberg	President & CEO	Executive	No				
3	00002	CZ2012CA0002	Suzan Fine	Executive Assistant	Assistant	Yes	Jossef Goldberg	<TBD>	<TBD>	<TBD>
4	00003	CZ2012CA0003	Anthony Char	Executive Assistant	Assistant	Yes	Clair Hector	<TBD>	<TBD>	<TBD>

Figure 7 – Excel Worksheet Column Headers

Rule (2) is that there MUST be two distinct Columns that equate to the “Who Am I” and the “Who Do I Report To” data fields. The Names in these Columns MUST be an exact match. The reason for these requirements is so that Visio can define the hierarchal structure for reporting purposes.

When the Worksheet has been selected from the file system, the Data Selector Wizard will return you to the screen, listing the selected data source as illustrated in Figure 8 below:

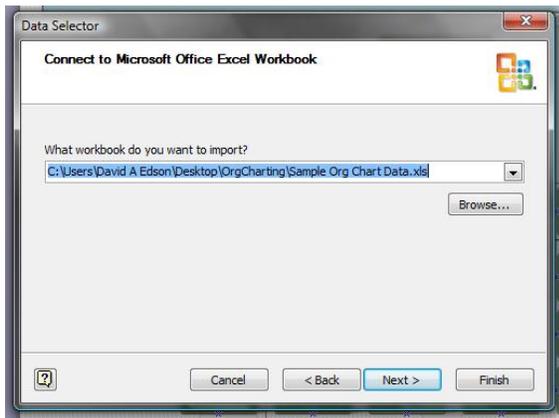


Figure 8 – Data File selected in Data Selector Wizard

When complete, the required file name will be displayed in the Text Box. Left-Clicking on the Next> Command Button advances to the next screen of the Data Selector Wizard. The next screen of the wizard is illustrated in Figure 9 below:

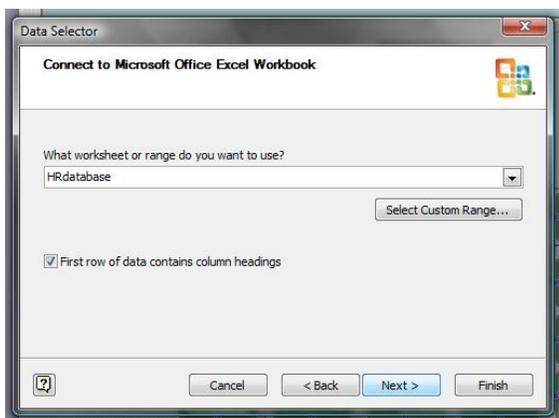


Figure 9 – Range Selection in the Data Selection Wizard

Because an Excel workbook was selected, the Wizard offers the user the opportunity to select a specific range of data on the worksheet. If no named range is available, the user can create one on the fly or simply use the entire worksheet. Left-Clicking on the Next> Command Button advances to the next screen of the Data Selector Wizard. The Field / Record selection Screen is illustrated in Figure 10 below:

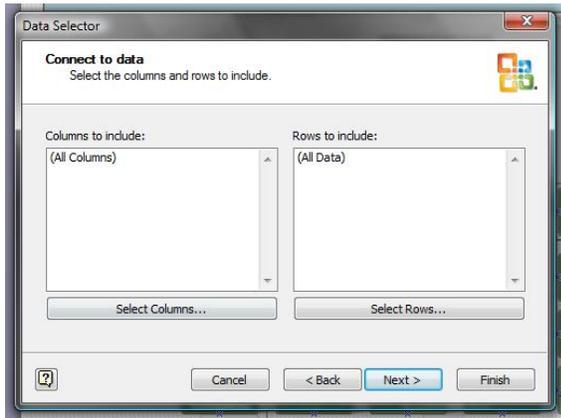


Figure 10 – Field / Record Filter / Selection

Utilizing the Select Columns... and Select Rows... Command Buttons, the user can filter the selection of data being used for the data link. This is illustrated in Figure 11 Below:

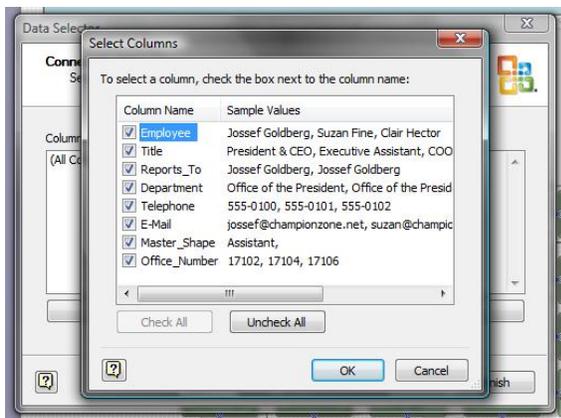


Figure 11 – Filter Fields

Select Columns... allows individual fields to be included or excluded from the data link. This is Illustrated in Figure 12 below:

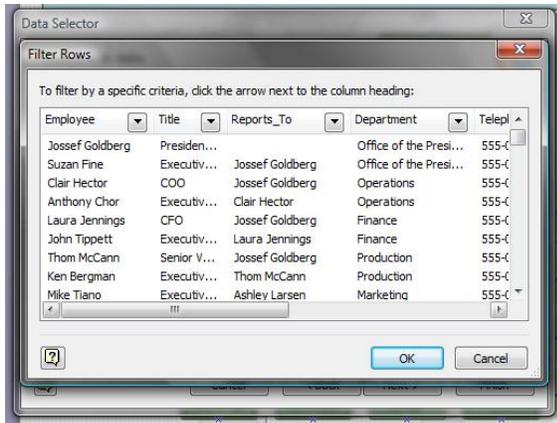


Figure 12 – Filter Records

Select Rows... allows individual records to be included or excluded from the data link. When filtering (if desired) has been applied you will be returned to the Connect to Data Screen of the Wizard as illustrated in Figure 13 below:

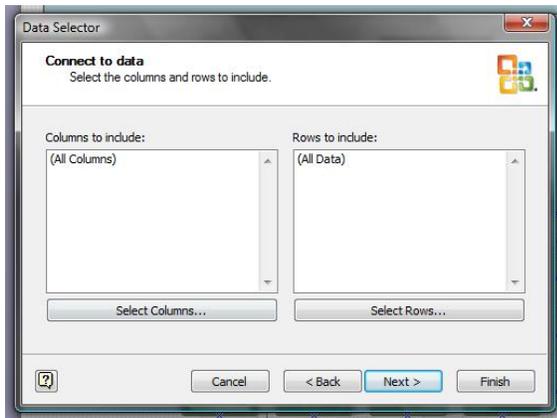


Figure 13 – Connect to Data Screen

Once any filters have been applied to the data set, the user is returned to the Connect to Data screen of the Wizard. Left-Clicking on the Next> Command Button advances to the next screen of the Data Selector Wizard. This screen will provide the opportunity to set the Key Field as illustrated in Figure 14 below:

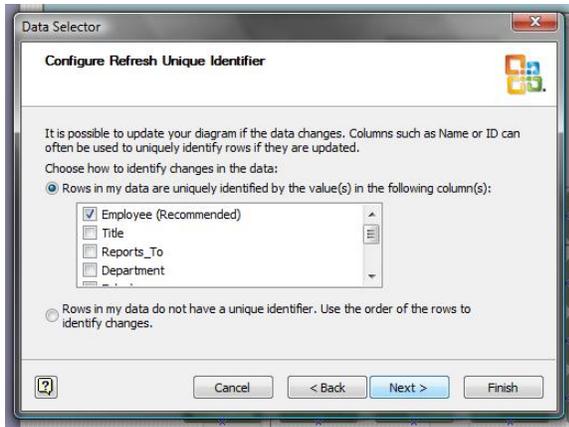


Figure 14 – Set Key Field

The Wizard takes a first pass estimate at which field in the data set contains unique record entries and offers this as the Unique Identifier. The user may either accept this default, or un-check that option and select another. Left-Clicking on the Next> Command Button advances to the next screen of the Data Selector Wizard. With all options properly set, the Wizard presents you with the closing screen as illustrated in Figure 15 below:

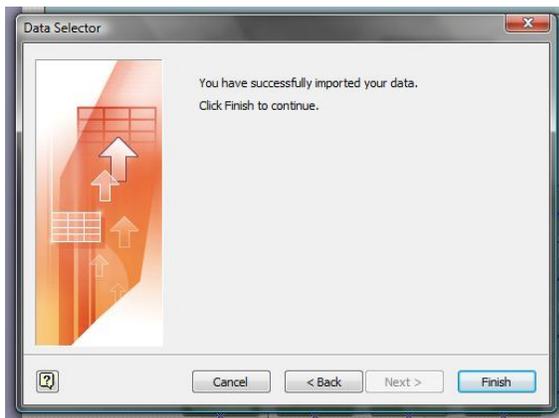


Figure 15 – Wizard closing Screen

The final screen of the Wizard simply confirms that the Wizard has all of the necessary information to import the data to the Visio Diagram as a whole. Left-Clicking the Finish Command Button confirms the user's choices, closes the dialog and attached the data set to the Visio diagram.

When the Wizard has completed, you will notice that a new External Data Table has been added to the Diagramming Environment as illustrated in Figure 16 below:

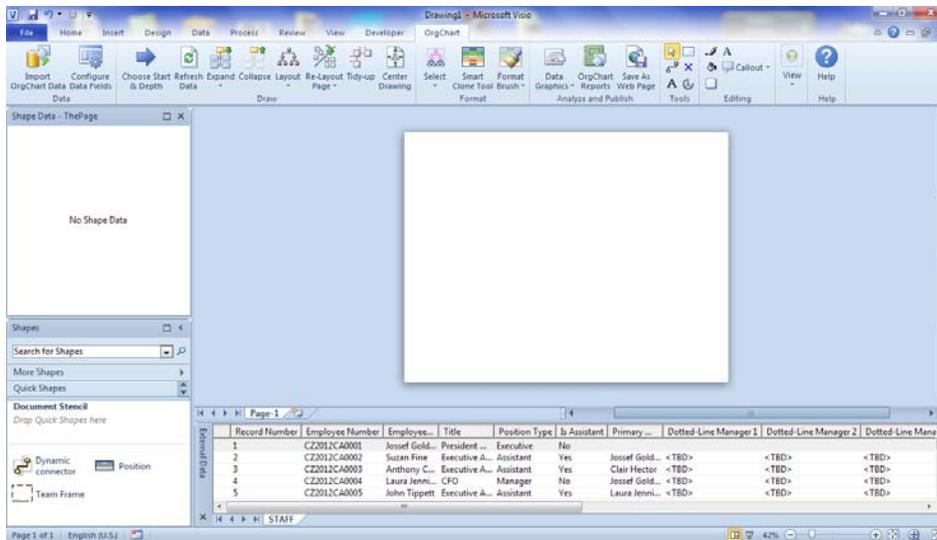


Figure 16 – External Data Table attached to the OrgChart Diagram

Configuring OrgChart for Visio to Use the External Data

Now that the Data has been imported to the Diagram itself it can be utilized to automatically attach data to the individual Employee Boxes and to maintain that link. In this manner, when the external data changes, a simple refresh of the diagram will always reflect the latest status of that data. However, before we can begin building the hierarchy, we need to tell OrgChart for Visio which of the External Data Fields we want to use, and how we want to use them. We accomplish by using the Configure Dialog. This item is the second item from the Left on the OrgChart Ribbon Tab and is listed as “Configure Data Fields” in the Data Area. Left-clicking to Select this item will display the “Shape Field to Data Field Mapping” Dialog. This is illustrated in Figure 17 below:

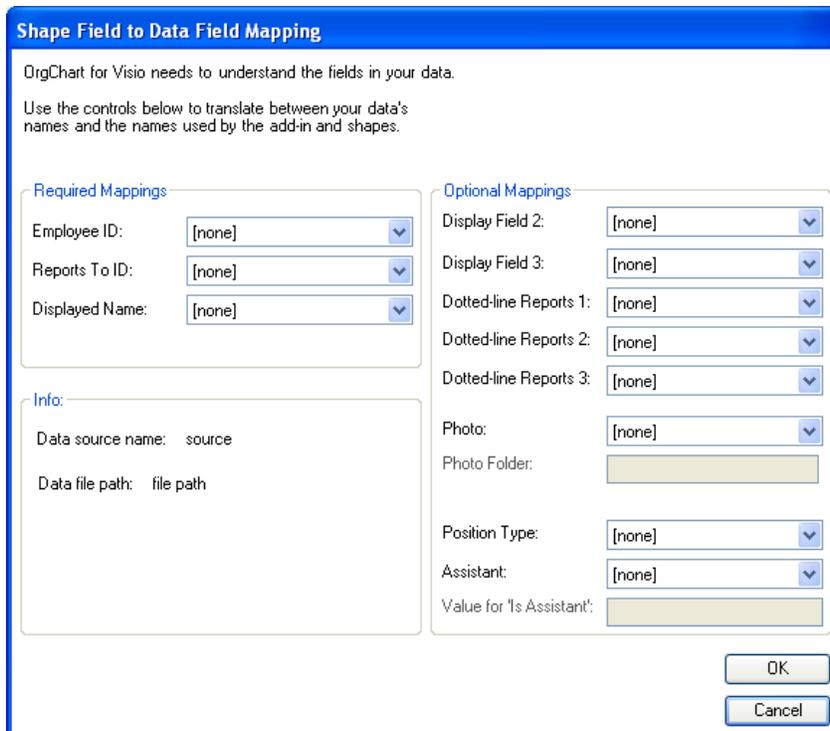


Figure 17 – Shape Field to Data Field Mapping Dialog

Working from Top to Bottom, the Items in this dialog are:

- ID Field – This is where the field that uniquely identifies each Employee is selected (Required)
- Reports To ID Field – This is where the field that identifies who the Employee Reports To is selected (Required)
- Name Field – This is the Field that contains the Name of the Employee as it should be displayed on the face of the Employee Box is selected (Required) Note that this may be the same field as the ID Field if desired
- Dotted-line Reports 1 Field – This is where, if a field exists in the data that identifies the first dotted-line reporting manager, the field may be used to draw the dotted-line relationship. (Optional)
- Dotted-line Reports 2 Field – This is where, if a field exists in the data that identifies the second dotted-line reporting manager, the field may be used to draw the dotted-line relationship. (Optional)
- Dotted-line Reports 3 Field – This is where, if a field exists in the data that identifies the third dotted-line reporting manager, the field may be used to draw the dotted-line relationship. (Optional)

OrgChart for Visio supports up to Three Automatically drawn Dotted-line Relationships: a feature not found in other OrgCharting tools.

- Picture – If the external data has a field with the name of an image file (.JPG, .GIF, .PNG, .TIF, .BMP) listed, this field can automatically add images in the Employee Boxes without the manual one-at-a-time methodology found in other OrgCharting tools. (Optional)
- Picture Folder – If the field containing the name of the image file does NOT have a full pathname listed, and if all image files are listed in a single folder which is accessible to the user’s matching (including via a network) the path to that folder may be listed here (Optional)
- Position Type – If the data file contains a field describing which position type should be used to display for that particular record, OrgChart for Visio can utilize this field to properly automatically configure the Employee Boxes to display the industry-standard look of the Employee Boxes. (Optional) Note the only valid entries for this field are (1) Executive, (2) Manager, (3) Position, (4) Vacancy, (5) Consultant, and (6) Assistant
- Assistant – If a field exists in the external data which identifies a record as being an Executive Assistant, this field may be used to position the Assistant with respect to their direct Manager. (Optional)
- Value for ‘Is Assistant’ – This value in the external data may be “Yes”, “No”, “yes”, “no”, “True”, “False”, “true”, or “false” (Only used if Assistant field above is used)

An example of this dialog being completed is illustrated in Figure 18 below:

Shape Field to Data Field Mapping

OrgChart for Visio needs to understand the fields in your data.
Use the controls below to translate between your data's names and the names used by the add-in and shapes.

Required Mappings

Employee ID: Employee Name
 Reports To ID: Primary Manager
 Displayed Name: Employee Name

Optional Mappings

Display Field 2: Title
 Display Field 3: Telephone
 Dotted-line Reports 1: Dotted-Line Manager 1
 Dotted-line Reports 2: Dotted-Line Manager 2
 Dotted-line Reports 3: Dotted-Line Manager 3
 Photo: Photo File
 Photo Folder: C:\Documents and Settings\J
 Position Type: Position Type
 Assistant: Is Assistant
 Value for 'Is Assistant': yes

Info:

Data source name: STAFF
 Data file path: C:\Documents and Settings\Joe\Desktop\ORG CHART DEMO\OCV\Excel\Workbook for use as Sample Organizational Data.xlsx

OK
 Cancel

Figure 18 - Fully completed Shape Field to Data Field Mapping Dialog

Define the Scope of the Initial Drawing of the OrgChart

Now that the Data has been imported and the OrgChart for Visio Add-In configured to use the Data, the final step is to actually begin drawing the Diagram.

The First Item at the Left in the Draw Area of the OrgChart Ribbon Tab, and the Third Item in the overall OrgChart Ribbon Tab is the “Choose Start & Depth”. Function. Left-clicking, to select this command displays the “Choose Starting Employee” Dialog. This is illustrated in Figure 19 below:

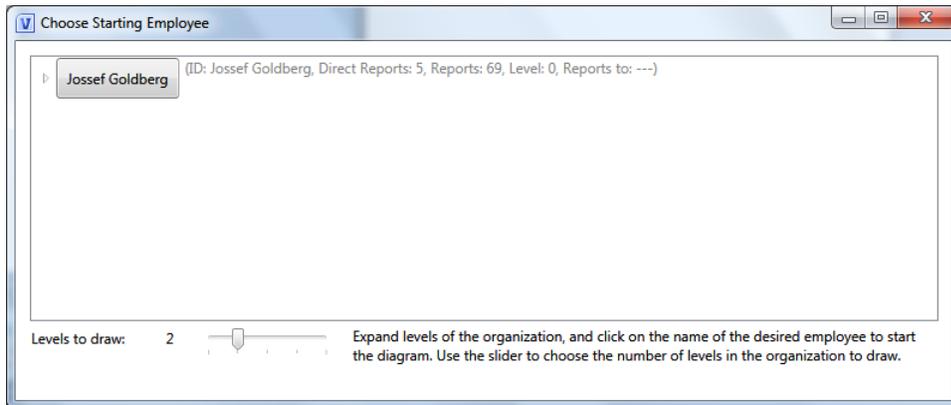


Figure 19 – Choose Starting Employee Dialog

Note that as this Dialog opens, The entire Organizational Tree is collapsed, showing only the Top level Executive at the top of the organizational structure. Left-clicking on the small triangle to the left of a person’s name expands that branch of the organization. You can repeatedly expand as much of the organizational structure as you care to see. In figure 20 below, we have expanded the tree to see greater detail in the organizational structure.

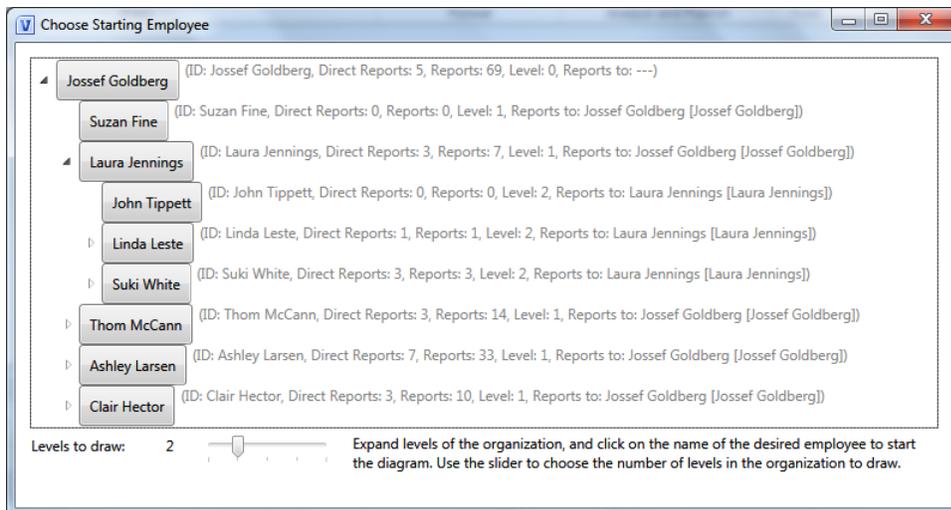


Figure 20 – Expanded Organizational tree

Note that for each item (leaf) in the tree, we can see helpful information about that particular record.

Information Shown includes:

- The Record (Employee) ID
- Number of Direct Reports
- Number of Total employees reporting up to this employee
- The Level in the Hierarchy (0 is the top, first level down is 1, etc.)
- The individual that this employee reports to

This information is used to assist in making an intelligent decision as to where the starting point of the drawing of the hierarchal tree should be.

Beneath the tree view is a slider control which is used to set the depth of the drawing. Setting the depth at a value of 2 results in the selected individual and the level directly under that person being drawn.

Keep in mind that individuals can be expanded and collapsed at any time to show or hide any portion of the organizational structure.

For the purposes of this getting started guide we are going to begin by drawing the Chief Executive Officer and his direct reports. We will set the level at 2, and left click on the Named Box in the tree-view control for “Jossef Goldberg”. The selection of a given individual closes the dialog and draws the hierarchy based on the configured name and depth. This is illustrated in Figure 21 below:

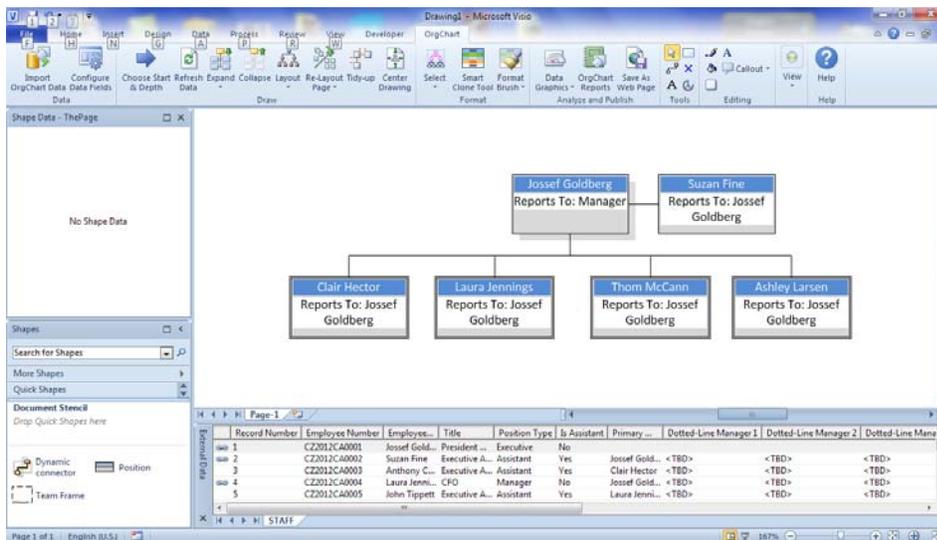


Figure 21 – Draw CEO and direct reports

Expanding the Subordinates under a Superior

There are actually Two forms of Expansion available within OrgChart for Visio: (1) Expanding on the Same Page, and (2) Expanding onto a New Page.

There are two methodologies for completing each of these actions; utilizing the item on the OrgChart Ribbon Tab that is labeled as “Expand”, or utilizing the SmartTag associated with the selected Employee Box (found immediately below and right of the box).

Expand on Page

With the Manager selected, Either (1) Left-click on the small black down-pointing triangle immediately beneath the Expand Item on the Draw Area of the OrgChart Ribbon Tab and select the item labeled as “Expand on Page”, or (2) float your cursor over the selected box, locate the SmartTag and Left-click on the small black down-pointing triangle then select the item labeled as “Expand on Page”. Either of these actions will expand the subordinates under that Manager on the current (same) page of the Organizational Diagram. This is illustrated in Figure 22 below:

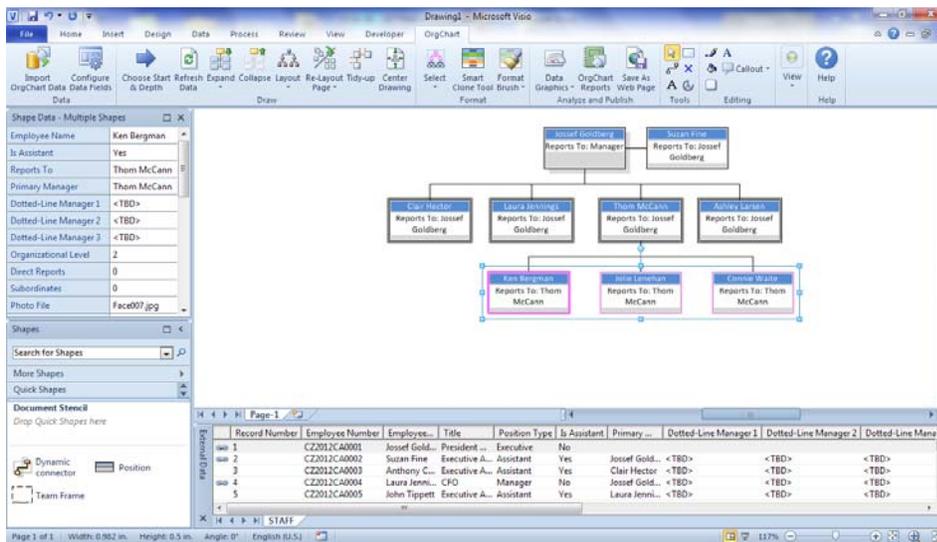


Figure 22 – Expand on Page

Expand on New Page

With the Manager selected, Either (1) Left-click on the small black down-pointing triangle immediately beneath the Expand Item on the Draw Area of the OrgChart Ribbon Tab and select the item labeled as “Expand on New Page”, or (2) float your cursor over the selected box, locate the SmartTag and Left-click on the small black down-pointing triangle then select the item labeled as “Expand on New Page”. Either of these actions will expand the subordinates under that Manager on a New) page of the Organizational Diagram. The newly created page will be named with the name of the Manager which was selected for the expansion onto this new Page. This is illustrated in Figure 23 below:

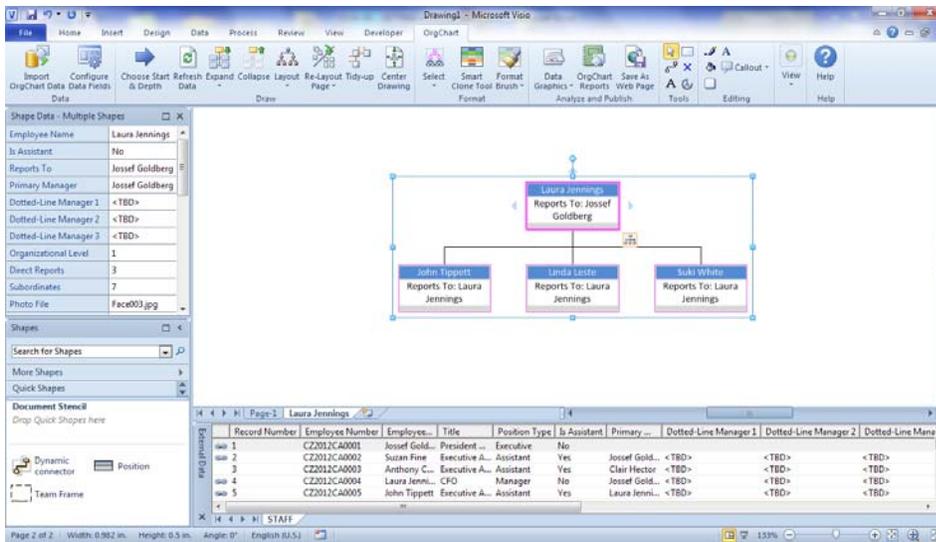


Figure 23 – Expand on New Page (new Page view)

Figure 24 illustrates the Original Page. Note the Naming of the new Page on the Page Tabs below the diagram page itself.

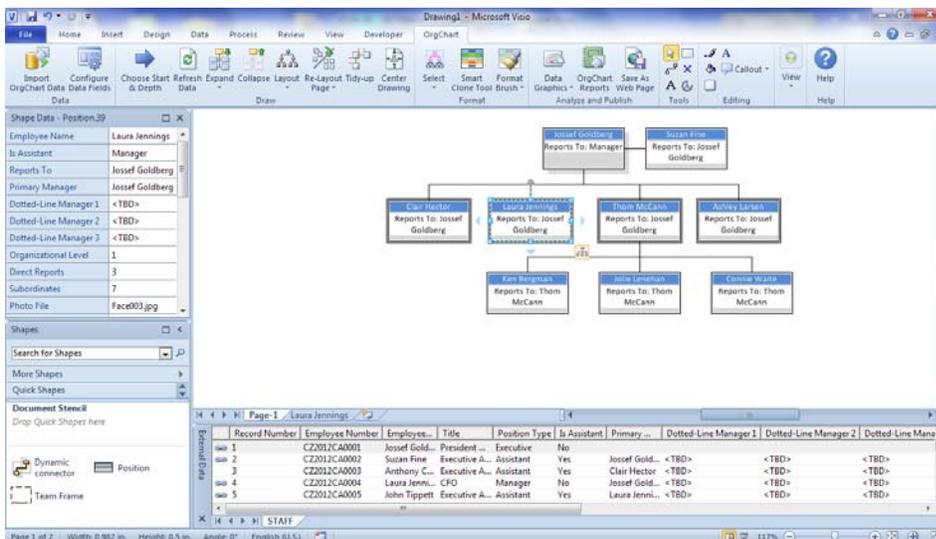


Figure 24 – Expand on new Page (original page view)

As illustrated in Figure 25, OrgChart for Visio properly provides hyperlinks to the new Page and returns on the new Page back to the Manager on the Original Page.

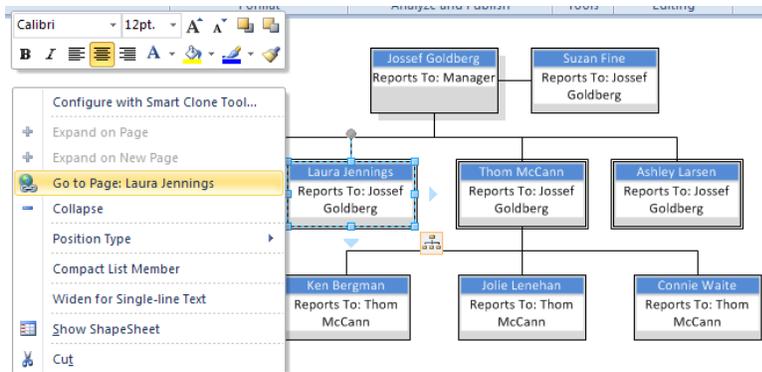


Figure 25 – Hyperlink on Expanded Employee Box

Formatting the Employee Box(s)

OrgChart for Visio includes an extremely intelligent, patented, Formatting tool called the “Smart Clone Tool”. This tool not only provides the ability to format visual aspects of an Employee Box, like Text, Fill, and Line, but FAR more importantly allows the configuration of all data and graphic elements of the Employee Box. Unlike a “Format Painter” the application of the result of the formatting can be applied at various Scoping Levels from an individual Employee Box, through a selection of Employee Boxes, through a Division (a Manager and all employees reporting to that Manager), through an entire page, or up to the entire diagram across all Pages.

To access this tool first select an Employee Box, then locate the Format Area on the OrgChart Ribbon and Left-click on the Smart Clone Tool item. This action will display the Smart Clone Dialog as illustrated in Figure 26 below:

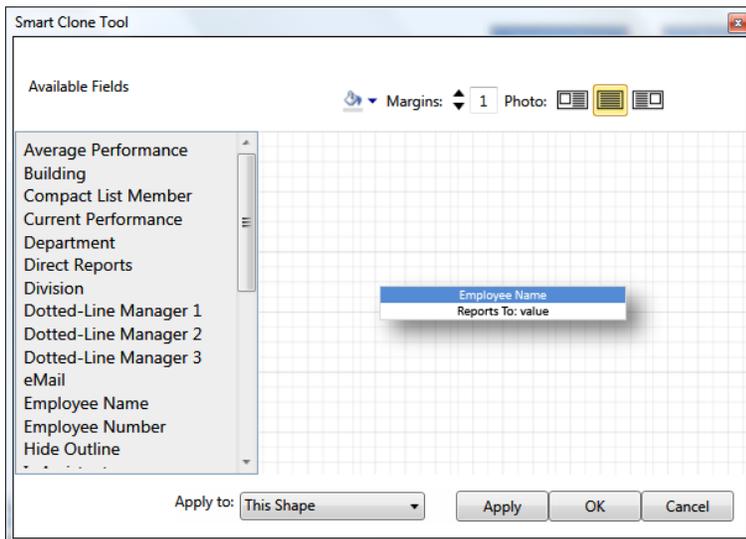


Figure 26 – Patented Smart Clone Tool

At the left of the Smart Clone Dialog you will find a list of all of the Data Fields that were imported from the External Source. You will additionally find unique calculated fields like “Direct Reports”.

The OrgChart for Visio Employee box is capable of displaying up to 15 fields on the face of the Employee Box, including an employee Photograph (image) if you defined the image in the external data set.

To add fields to the Employee Box, simply drag a field from the list onto the Illustration of the Employee Box in the main body of the dialog. To remove a field from the Employee Box, simply drag the field from the illustration in the main body of the dialog to the list at the left.

Selecting any field allows you to format that field visually in any manner you desire. You can format:

- The font used in the field
- The font size used in the field
- The font formatting (bold, italic, etc.) used in the field
- The font color used in the field
- The text justification (left, center or right) used in the field
- The background color used in the field
- Whether or not to show the label for the field item used in the field
- Margins used in the field
- Photograph placement (left, right, or none) in the Employee Box

The controls in the dialog are intuitive. In this getting started guide we'll make quite a few changes to the default Employee Box as shown in Figure 26 above. The results of these changes are shown in Figure 27 below:

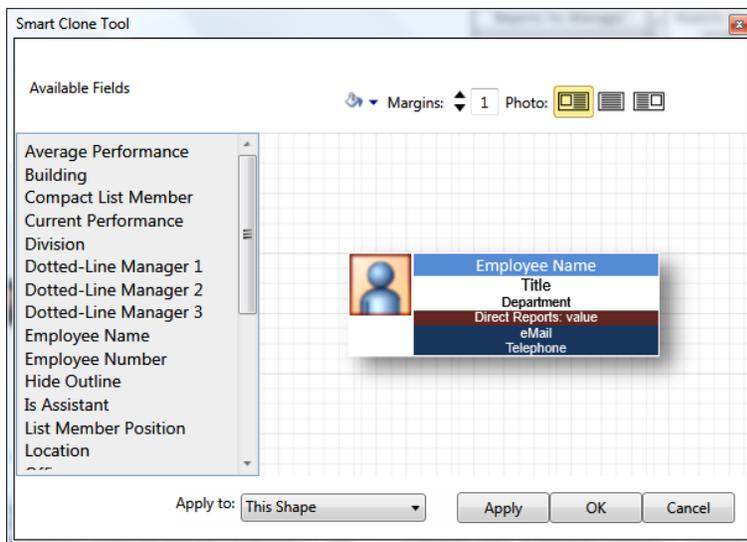


Figure 27 – Formatting Data and Visual elements in Patented Smart Clone Tool

Once we have properly configured the Employee Box, we then select the Scope of Application as defined in the Drop-down listing listed as Apply to: This is illustrated in Figure 28 below:

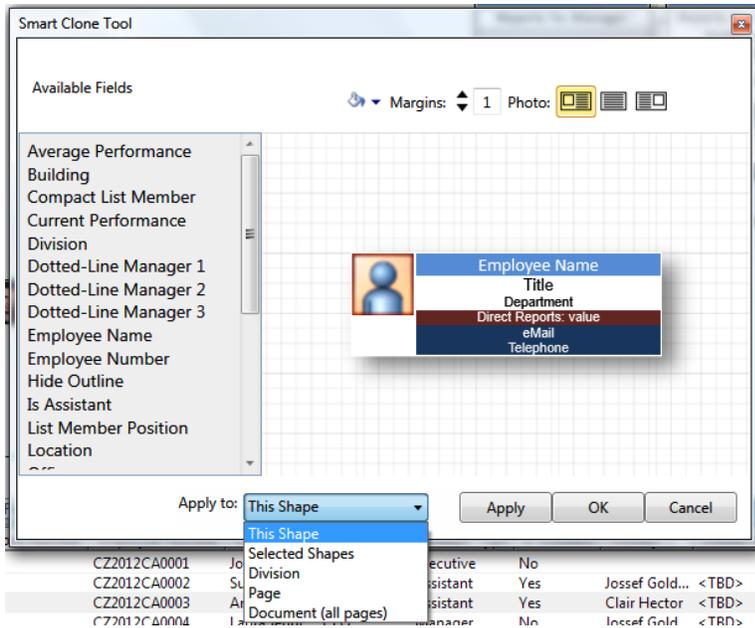


Figure 28 – Applying Scope within Patented Smart Clone Tool

Note how this is applied when we Left-click on the OK Command Button in the dialog. This is illustrated in Figure 29 below:

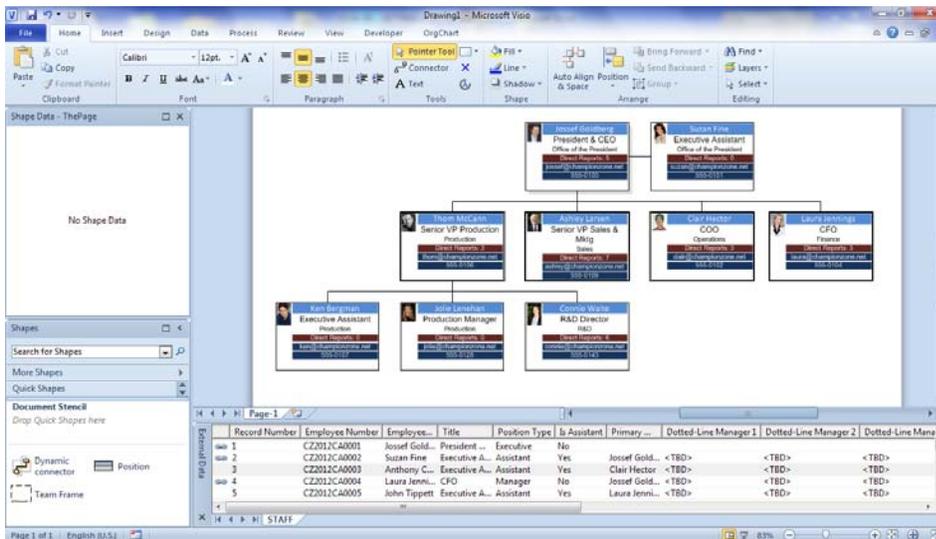


Figure 29 – Applied Formatting and Data from Patented Smart Clone Tool

Modifying the Layout of the Employee Boxes

Like any Organizational Diagramming Tool, the organizational diagram needs to be able to accommodate various and diverse layout configurations. OrgChart for Visio allows you to select a Manager and then Left-Click on the small black down-pointing triangle immediately beneath the Layout Item in the Draw Tab to select a desired layout configuration for that Manager and his or her Subordinates. In this Getting Started Guide we are going to alter Thom McCann’s team from a horizontal

configuration to a two column configuration in order to save space. We first select Thom McCann then select the Layout Item then from the palette of options select the two-column format. This action will change the layout of Thom’s team to the layout shown in Figure 30 below:

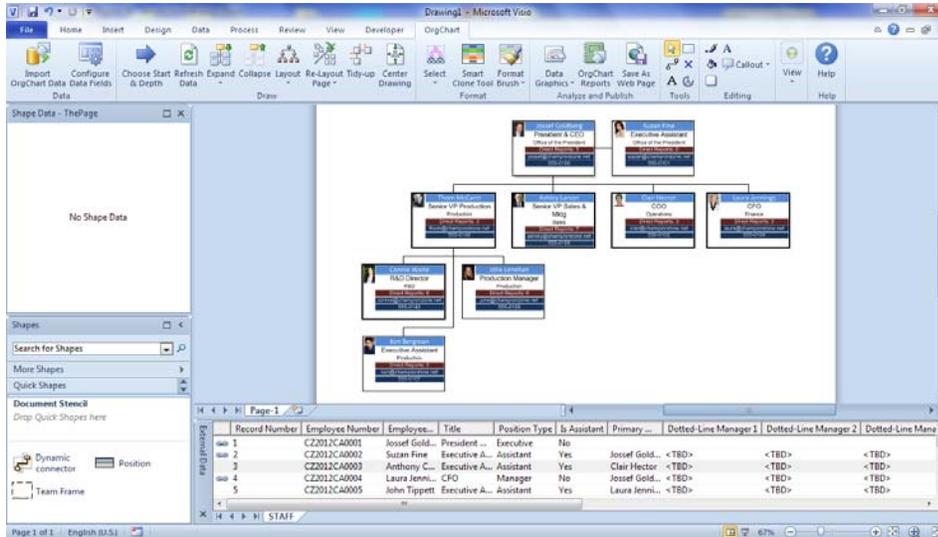


Figure 30 – Modified Layout

Displaying Key Performance Indicators – Data Graphics

Visio 2010 Professional and Premium include the capability to add graphical elements to Shapes that reflect the status of Data associated with those Shapes. With OrgChart for Visio these Data Graphics have been expanded and placed on steroids to allow the Visio OrgChart to have a graphically rich and professional look that delivers instant visual understanding of the key performance indicators based on the data in the diagram. And the extra benefit is that when the diagram is refreshed based on changes in the external data, the Data Graphics automatically update as well.

Defining a Data Graphic

Select the small black down-pointing triangle immediately under the Data Graphics item in the Analyze and Publish Area of the OrgChart Ribbon. This Action will display the Data Graphics Task Area as illustrated in Figure 31 below:

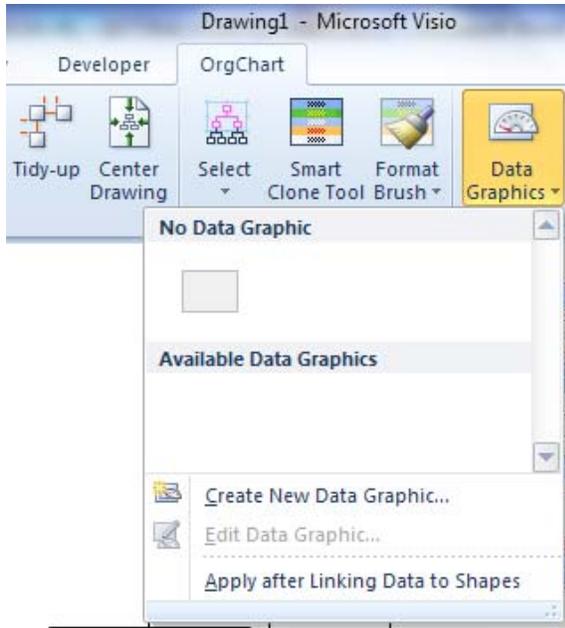


Figure 31 - Data Graphics Task Area

Next Left-click on the Create New Data Graphic... in the Data Graphics Task Area. This action will display the New Data Graphic Dialog as illustrated in Figure 32 below:

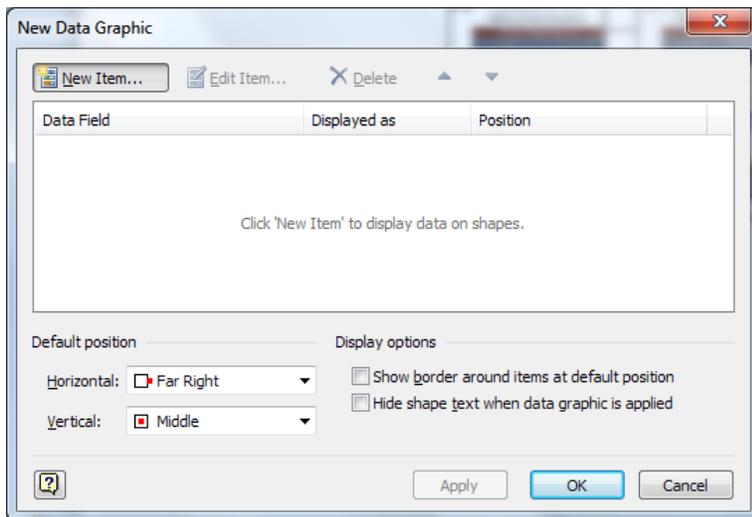


Figure 32 – New Data Graphic Dialog

Left-click on the New Item... Command Button. This action will display the New Item Sub-Dialog. As an example in this Getting Started Guide, we will select the Current Performance field in the Data Field Item Listing and select Icon Set from the Displayed as Listing. We will use one of OrgChart for Visio's custom Data Graphics the Glossy Red Buttons. We will define the Performance items in the range of 1 to 5 and define the placement to be at the Left Horizontally and Middle Vertically. This is illustrated in Figure 33 Below:

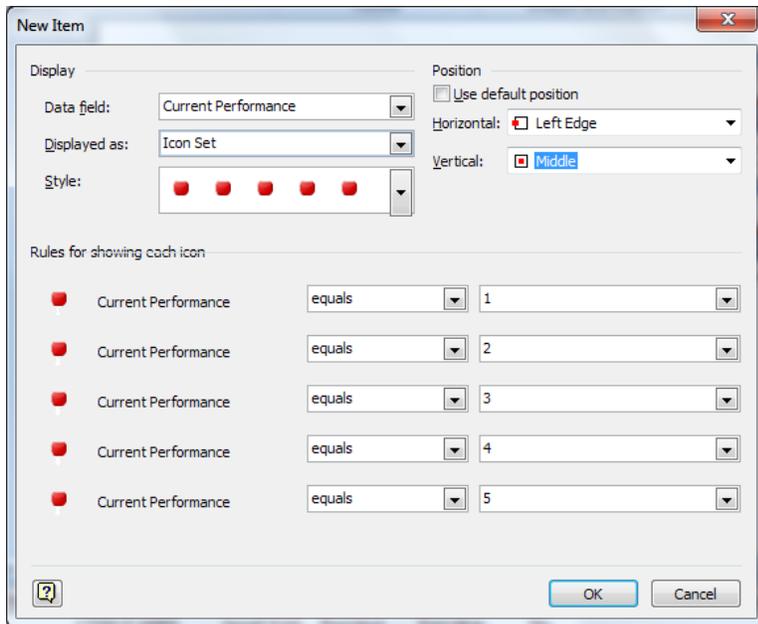


Figure 33 – New Data Graphic Definition

We'll now Left-click the OK Command Button to accept our definition and close the New Item Sub Dialog and return to the New Data Graphic Dialog.

We'll now Left-click the OK Command Button to accept our new Data Graphic and close the New Data Graphic Dialog and return to the diagram.

We now need to apply the Data Graphic to the Diagram. Press the Ctrl+A key combination to select all of the Employee Boxes on the Page. Return to the Data Graphic Task Area and Left-Click on the newly Available Data Graphic. This action will display the Data Graphic on the Employee Box as illustrated in Figure 34 below:

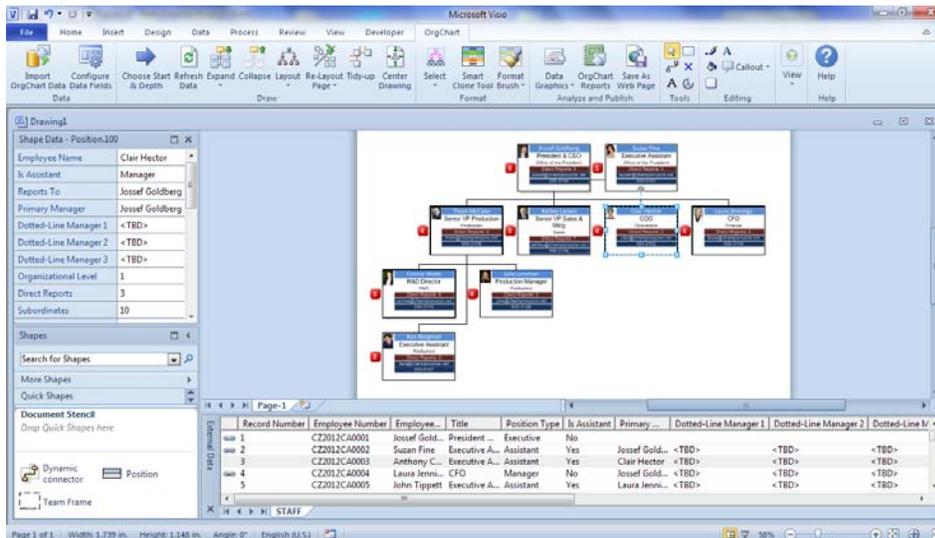


Figure 34 – Data Graphic Applied

Here's a detail of the applied Data Graphic. It is illustrated in Figure 35 below:

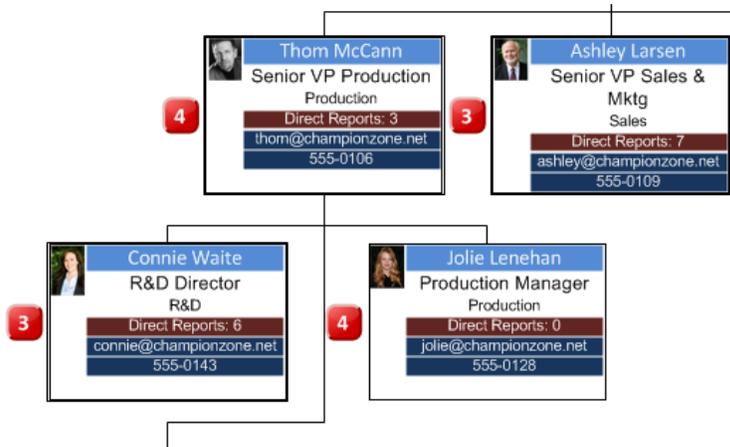


Figure 35 – Data Graphic Detail

Red buttons with Numbers probably don't mean much to the casual viewer. Visio 2010 Professional and Premium provide the ability to Automatically Generate a Legend which describes what this Data Graphic Represents. Navigate to the Data Tab on the Visio Ribbon and Left-click on the Insert Legend item in the Display Data Area. Select either the Vertical or Horizontal Legend depending on your preference. Return to the OrgChart Tab. Select Ctrl+Shift+W to zoom out to the Whole Page and note that the Legend has been automatically created for you and placed in the Upper-Right-Hand-Corner of the Diagram Page. You may now relocate the legend to a position that is most advantageous to you. This is illustrated in Figure 36 below:

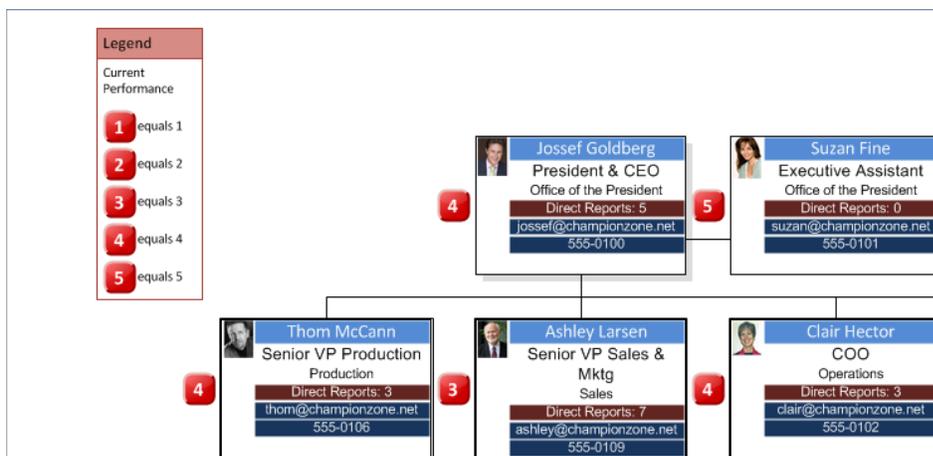


Figure 36 – Data Graphic with Legend

Data Reporting

OrgChart for Visio provides a library of pre-defined Data Reports to enable detailed analysis of the Data that has been instantiated as part of your Organizational Diagram.

To access these pre-defined Reports, locate the Analyze and Publish area of the OrgChart Ribbon. Locate and select the OrgChart Reports item. This action will display the Reports Dialog

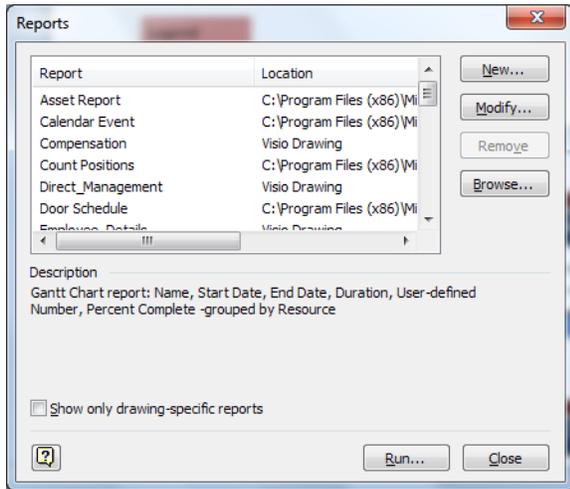


Figure 37 – Report Selector

Left-click to select the Compensation Report from the collection of available reports. Next select the Run... Command Button and select the Excel Item from the list of available Output Formats.

The Visio Report Generator will create an Excel Workbook with the data from your Organizational diagram. The output will look similar to the Worksheet illustrated below as Figure 38:

	A	B	C	D	E	F
1	Compensation Report					
2		Department	Employee Name	Title	Salary	Tenure
3		Finance	Laura Jennings	CFO	\$126,000.00	28
4	Total				\$126,000.00	
5		Office of the President	Suzan Fine	Executive Assistant	\$41,000.00	30
6		Office of the President	Jossep Goldberg	President & CEO	\$245,000.00	36
7	Total				\$286,000.00	
8		Operations	Clair Hector	COO	\$104,000.00	
9	Total				\$104,000.00	
10		Production	Ken Bergman	Executive Assistant	\$41,000.00	30
11		Production	Jolie Lenehan	Production Manager	\$77,850.00	14
12		Production	Thom McCann	Senior VP Production	\$118,000.00	32
13	Total				\$236,850.00	
14		R&D	Connie Waite	R&D Director	\$96,000.00	32
15	Total				\$96,000.00	
16		Sales	Ashley Larsen	Senior VP Sales & Mktg	\$117,500.00	31
17	Total				\$117,500.00	
18						
19	Grand Total				\$862,350.00	

Figure 38 – Compensation Report Sample Output

Conclusion

OrgChart for Visio has been designed for both the Visio novice and seasoned Visio Professional. It has been designed to be razor-focused on creating and maintaining the types of Structured Refreshable Hierarchal diagrams that you find most important and most useful in your daily enterprise endeavors.

For more detailed feature-by-feature, item-by-item documentation, tutorials, and Help please reference the OrgChart for Visio Help.PDF file located in your Install directory, or simply left-click on the Help item on the OrgChart for Visio Toolbar while working in an OrgChart for Visio diagram.

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.

Key reasons to why to use the OrgChart for Visio Add-In

Question: Visio does a wonderful job with diagrams of all kinds. So why would I be interested in using the OrgChart for Visio Add-In instead of just using Visio's native organization chart features?

Answer: OfficeWork Software created OrgChart for Visio in response to requests by thousands of Visio users for a way to more quickly and more easily create AND maintain organization charts. The technology in OrgChart for Visio extends Visio's capabilities to make charting easier, faster, and more accurate than ever. If you have a data source to import, OrgChart for Visio is absolutely the fastest and easiest way to create intelligent, refreshable organization charts.

Question: So, what are the differences between Visio without this add-in and Visio with the OrgChart for Visio add-in?

Answer: The following are detailed differences between creating organization charts using the Visio "In-Box" (no add-in) solution, and using Visio WITH the OrgChart for Visio add-in.

- 1. The In-Box solution utilizes a wizard does not allow the specification of any top level employee for charting other than the one listed as the top in the data source, whereas OrgChart for Visio allows you to easily specify any desired starting point for the chart.**
- 2. The Visio In-Box solution has no way of dealing with employee adds, employee departures, nor employee change of reporting.** Any change in the source data will require a manual update of the diagram. OrgChart for Visio recognizes changes in the data and adds employees, removes employees and alters the employee's reporting structure and reporting with a simple refresh of the diagram.
- 3. When the Visio In-Box wizard has completed its run, the diagram has absolutely no relationship to the source data.** The data read is a one-time, single pass generation of the diagram from the source data and then no further relationship to the data after the diagram has been generated. OrgChart for Visio is data-connected from the outset and always remains connected to the data. If changes occur in the data a simple refresh of the diagram updates from the data.
- 4. Though Custom Shape Data Reports are available in Visio, there are only two pre-defined reports, which simply list very basic information.** OrgChart for Visio has a wealth of pre-defined report templates available and can utilize these for the generation of Microsoft Excel-based reports, HTML Table-based Reports, Embedded Excel reports residing on the individual pages, and raw XML-based reports for use in any application capable of consuming the report XML data.

- 5. Visio's In-Box solution does not allow the specification of depth under any given node**, it only makes its own determination as to how it wants to break down the organizational structure. OrgChart for Visio allows for the specification of levels at the time of first chart creation as well as the further specification when staff are expanded on either (a) the same page, or (b) a new page.
- 6. Each creation of the Visio in-box OrgChart diagram will generate the left to right order randomly and there is no way that the left to right order can be controlled.** OrgChart for Visio always lays out the nodes from left to right in alphabetical order and does so in the same manner each and every time.
- 7.** The shapes that make up the employee boxes in the in-box solution consists of exactly six separate employee box styles (a) Executive, (b) Manager, (c) Position, (d) Assistant, (e) Vacancy, and (f) Consultant. The user **MUST** use these exact Shapes (which are pre-populated on the diagram's local stencil). These shapes may not be customized in any manner or the solution will fail. **The OrgChart for Visio solution contains a single Master which is HIGHLY configurable via the Clone tool and by additional user-adaptable tailoring.**
- 8. The Visio in-box solution does not recognize any form of "dotted-line" reporting.** The user must manually lay in these relationships as after-the-fact post-processing. OrgChart for Visio allows for the fully automated adding of up to three dotted-line relationships for any given node.
- 9.** Visio's In-Box solution can, if the user understands how, make use of the default in-box Data Graphics as Key Performance Indicators (KPI's). **OrgChart for Visio supplies custom organizational-based Data Graphics in addition to those found in the in-box solution.**
- 10.** When new pages are generated in the In-Box solution diagram, they number/name the pages as "Page-1, Page-2, Page-3", etc. **When OrgChart for Visio generates new pages, each new page is named for the person at the top node of that page. This makes the diagram far easier to navigate and understand.**
- 11. The Visio In-box solution requires that if pictures of the employees are to be added, they must be added to each and every employee box one-at-a-time.** This is a time-consuming process. OrgChart for Visio can automatically add employee pictures to employee boxes on any given scoping level; the currently selected employee box, the collection of selected boxes, the entire page, or the entire diagram
- 12. As you look at the two example diagrams, note the visual differences between the in-box and OrgChart for Visio. OrgChart for Visio's collection of tools** including the Clone Tool, the SmartBrush Tool, the Layout Tools, the Center Drawing/Page resize Tool and many other tools make OrgChart for Visio vastly more user friendly in the creation and the maintenance of the organizational diagrams. The supplied .PDF files contain Hyperlinks for easy navigation of the diagrams.

Summary: These explain only some of the advantages to using the OrgChart for Visio Add-In. But it's safe for us to recommend that as you adopt this program you will never want to go back to making org charts the old-fashioned way.

Legend

Tenure

- 1** is less than or equal to 12 Months
- 2** is between 12 and 24 Months
- 3** is between 24 and 36 Months
- 4** is between 36 and 48 Months
- 5** is greater than or equal to 48 Months

Average Performance Scale of 1 to 5

★ ★ ★ ★ ★

Employee Data					
Employee Name	Employee Number	Location	Building	Office	eMail
Ashley Larsen	CZ2012CA0007	Tiburon, CA USA	Balmoral M3	14114	ashley@championzone.net
Clair Hector	CZ2012CA0025	Tiburon, CA USA	Balmoral M3	14106	clair@championzone.net
Josief Goldberg	CZ2012CA0001	Tiburon, CA USA	Balmoral M3	14102	josief@championzone.net
Laura Jennings	CZ2012CA0004	Tiburon, CA USA	Balmoral M3	14110	laura@championzone.net
Suzan Fine	CZ2012CA0002	Tiburon, CA USA	Balmoral M3	14104	suzan@championzone.net
Thom McCann	CZ2012CA0006	Tiburon, CA USA	Balmoral M3	14113	thom@championzone.net



Josief Goldberg
 President & CEO
 Office of the President
 Subordinates: 69
 Direct Reports: 5

3

Average Performance

★ ★ ★ ★ ★



Suzan Fine
 Executive Assistant
 Office of the President

3

Average Performance

★ ★ ★ ★ ★



Ashley Larsen
 Senior VP Sales & Mktg
 Sales
 Subordinates: 33
 Direct Reports: 7

3

Average Performance

★ ★ ★ ★ ★



Clair Hector
 COO
 Operations
 Subordinates: 10
 Direct Reports: 3

2

Average Performance

★ ★ ★ ★ ★



Laura Jennings
 CFO
 Finance
 Subordinates: 7
 Direct Reports: 3

3

Average Performance

★ ★ ★ ★ ★



Thom McCann
 Senior VP Production
 Production
 Subordinates: 14
 Direct Reports: 3

3

Average Performance

★ ★ ★ ★ ★

Legend

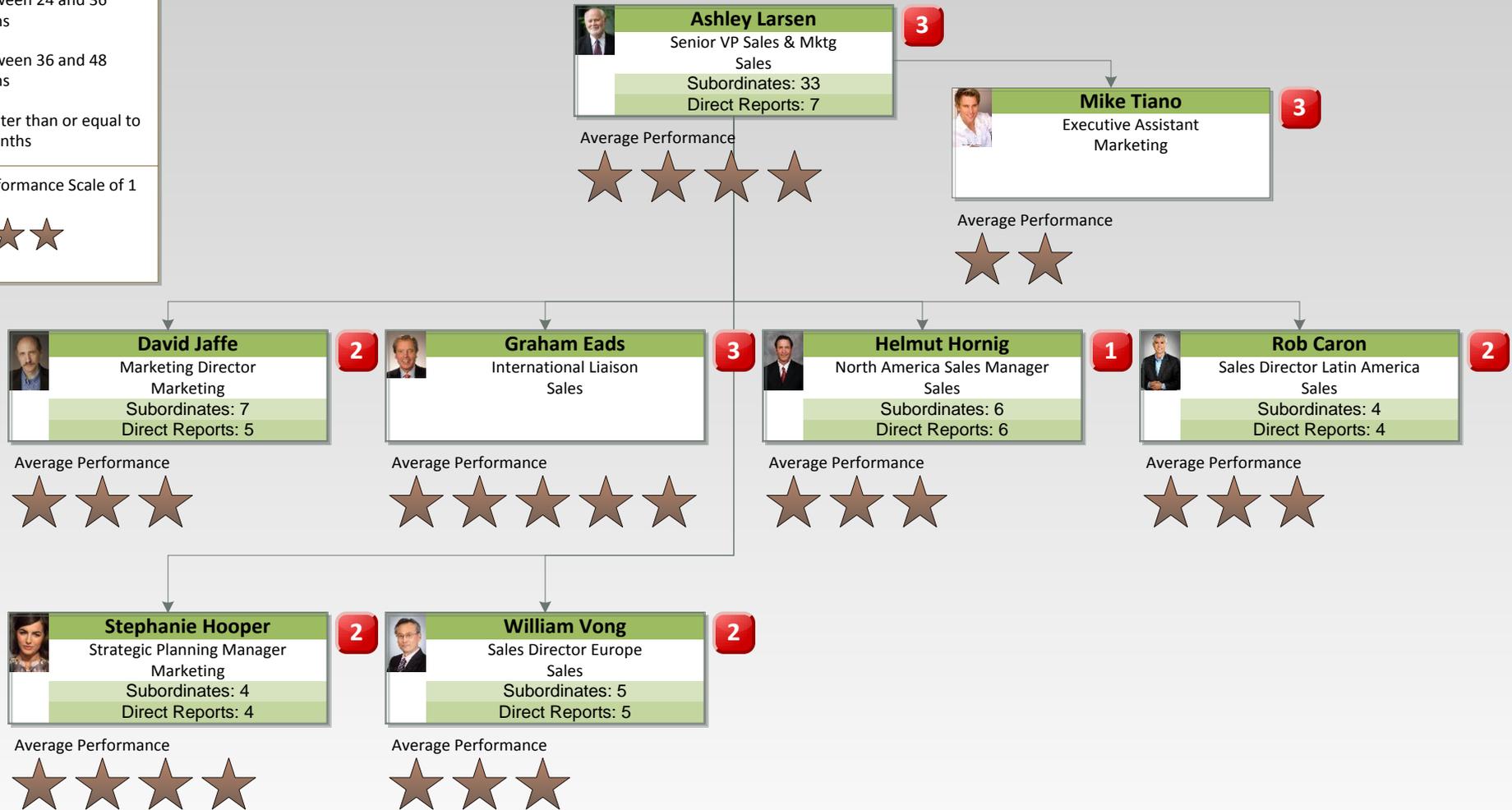
Tenure

- 1** is less than or equal to 12 Months
- 2** is between 12 and 24 Months
- 3** is between 24 and 36 Months
- 4** is between 36 and 48 Months
- 5** is greater than or equal to 48 Months

Average Performance Scale of 1 to 5

★ ★ ★ ★ ★

Employee Data					
Employee Name	Employee Number	Location	Building	Office	eMail
Ashley Larsen	CZ2012CA0007	Tiburon, CA USA	Balmoral M3	14114	ashley@championzone.net
David Jaffe	CZ2012CA0035	Irvine, CA USA	Orange	1201	david@championzone.net
Graham Eads	CZ2012CA0016	Aberdeen, Scotland UK	Paisley Terrace		graham@championzone.net
Helmut Hornig	CZ2012CA0017	Phoenix, AZ USA	Pueblo	201	helmut@championzone.net
Mike Tiano	CZ2012CA0009	Tiburon, CA USA	Balmoral M3	14116	mike@championzone.net
Rob Caron	CZ2012CA0060	Cancun, Mexico	Merida		rob@championzone.net
Stephanie Hooper	CZ2012CA0036	Williamsburg, VA USA	Mt Vernon		stephanie@championzone.net
William Vong	CZ2012CA0066	Aberdeen, Scotland UK	Paisley Terrace		william@championzone.net



Legend

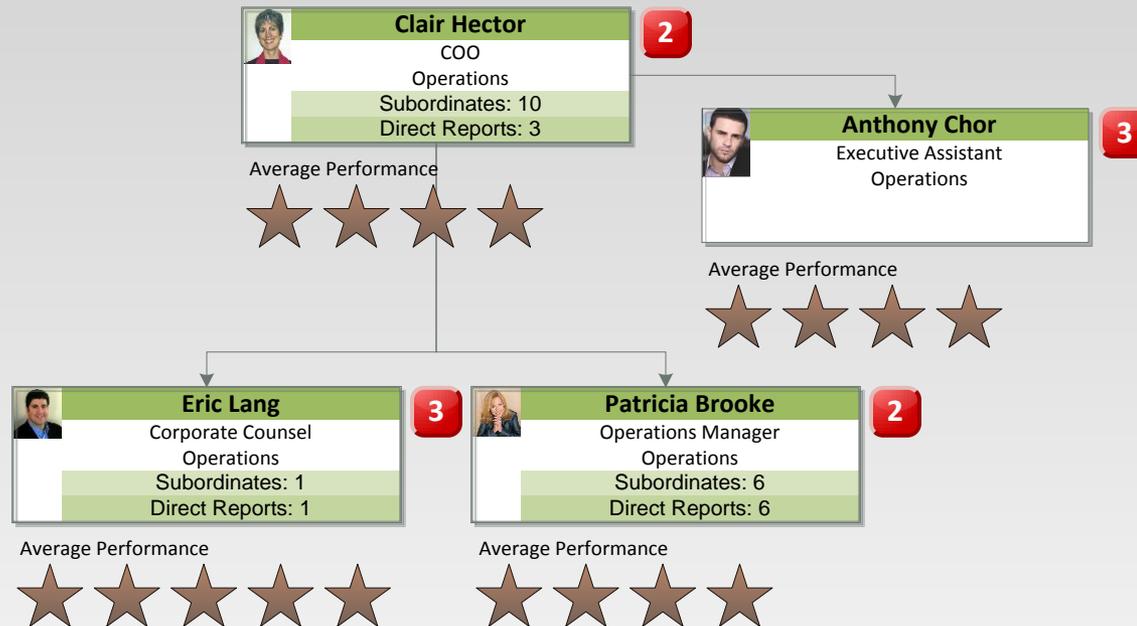
Tenure

- 1** is less than or equal to 12 Months
- 2** is between 12 and 24 Months
- 3** is between 24 and 36 Months
- 4** is between 36 and 48 Months
- 5** is greater than or equal to 48 Months

Average Performance Scale of 1 to 5

★ ★ ★ ★ ★

Employee Data					
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