

Print

Select a data source

On this screen, you tell the wizard where to find the data to create an organization chart.

Entering data in a new text or Microsoft Excel file

If you choose to enter the data into a new text (*.txt) or Excel (*.xls) file, the wizard opens a template with the column headings in place. After you add data, save and name the file. Then, start the wizard again and choose Read Data From An Existing File.

Reading data from an existing file

The wizard can create an organization chart based on data from a text (*.txt), Org Plus (*.txt), Microsoft Excel Workbook (*.xls), or ODBC-compliant database file.

Open Database Connectivity (ODBC) is a standard Microsoft interface that allows applications to access, view, and modify data from a variety of databases. Examples of ODBC-compliant database applications include Microsoft Access 7.0, Microsoft SQL Server, and Oracle SQL Server.

If the Organization Chart Wizard can't read your data file or produces unexpected results, check to be sure there are

- Fields (columns) in your data file that provide Unique ID, Name, and Reports_To data for each shape. The wizard looks for these columns in your data file. If it doesn't find them, it prompts you to indicate which columns provide equivalent information.
- Placeholders for columns without data in them, if you're using a tab- or comma-delimited text file.
- A field that uniquely identifies each record.

Check to be sure the file does not contain

- Duplicate records.
- Circular references — that is, any person reporting to him or herself.
- More than one record (the record for the person at the top of the chart) with a blank in the Reports_To column.

To simplify the task, you can build your data file using one of the two data file templates that ship with Visio. These templates have only the column headings filled in. The data file templates are called Org Chart Data Template.txt and Org Chart Data Template.xls, and they are located in the Business Diagrams folder in the Visio Solutions folder.

Print

Choosing equivalent columns

This screen appears when the wizard examines your data file and doesn't find columns labelled Unique ID, Name, and Reports_To. To create an organization chart, the wizard requires these three types of information.

Unique ID A way to uniquely identify each position. If each employee has a unique name, the Name field can serve as the Unique ID field. If more than one employee has the same name, you need another field, such as Unique ID or Employee Number.

Name A person's name corresponding to each position.

Reports_To The position (identified by Unique ID) the employee reports to. This field should be blank only for the person at the top of the organization chart.

From the list boxes, choose the column names from your data file that correspond to Unique ID, Name, and Reports_To. If your data file doesn't include equivalent information, cancel the wizard and revise the data file.

Print

Choosing data file columns to add to shapes as custom-property fields

On this screen, you can choose columns from your data file and add them to shapes as custom-property fields.

The column headings listed under Data File Columns include any headings in your data file other than Unique ID, Name, and Reports_To (or their equivalents).

A custom-property field is a database field in which you can enter data relevant to a shape. After shapes have custom-property fields, you can enter data for the properties. For example, if organization chart shapes have custom-property fields for Department and Telephone, you can add data to those fields so that each employee's department and telephone number is associated with the relevant organization chart shape.

To enter a value into a custom-property field, right-click a shape, then choose Properties from the shortcut menu. Enter the data in the Custom Properties dialog box.

Print

Selecting or creating an ODBC data source

If the database you want to create an organization chart from isn't listed on this screen, it means:

- The database doesn't exist, or
- The database is not defined as an ODBC data source.

To create a new database and define it as an ODBC data source or to define an existing database as a data source, click Create New Data Source, then follow the screens.

Print

Selecting events and actions

You can add to linked organization chart shapes.

When you add an action, the action becomes available as a command on the menu that appears when you right-click the shape.

Actions

Select Database Record Check to make the Select Database Record command available on the menu that appears when you right-click the linked shape. If you choose the command, you can specify a new database record to link to the shape.

Refresh Shape Cells Check to make the Refresh Shape command available on the menu that appears when you right-click the linked shape. This command looks up the database record to which the shape is linked. If the values in the shape's ShapeSheet cells differ from the values in the database, the ShapeSheet cell values are then refreshed.

If you don't check this option, you can still refresh selected shapes or all the shapes on a page by choosing Tools > Macro > Database > Database Refresh.

Update Database Record Check to make the Update Database Record command available on the menu that appears when you right-click the linked shape. This command looks up the database record to which the shape is linked. If the values in the shape's ShapeSheet cells differ from the values in the database, the database field values are then updated.

If you don't check this option, you can still update database records linked to selected shapes or to all the shapes on a page by choosing Tools > Macro > Database > Database Update.

Delete Shape And Database Record Check to make the Delete Shape And Database Record command available on the menu that appears when you right-click the linked shape. This command deletes the shape and its linked database record simultaneously.

Print

Selecting actions and events for a drawing page

When you add an action to a drawing page, the action becomes available as a command on a menu. You can choose a command by right-clicking a drawing page that has no shapes selected.

When you add an event to a drawing page, you define how shapes in the drawing respond to particular user actions, such as opening a file.

Page Actions

Refresh Shapes On Page Adds the Refresh command to the drawing page right-click menu. When you right-click the page and choose Refresh, values in the shape's ShapeSheet cells are refreshed to match values in the database records to which they are linked. Choosing Refresh on the drawing page right-click menu refreshes all shapes on the page at once.

Update Shapes On Page Adds the Update command to the drawing page right-click menu. When you right-click the drawing page and choose Update, values in the database records are updated to match values in the ShapeSheet cells to which the records are linked. Choosing Update on the drawing page right-click menu updates database records for all shapes on the page at once.

Events

Refresh Linked Shapes On Document Open Refreshes ShapeSheet cell values for all shapes in your drawing each time you open the drawing. When you refresh shapes, values in each shape's ShapeSheet cells are refreshed to match values in the linked database records.

Periodically Refresh Based On NOW Function Refreshes ShapeSheet cell values for all shapes in a linked drawing at specific intervals defined by the NOW function. When you refresh shapes, values in each shape's ShapeSheet cells are updated to match values in the linked database records. When you choose this option, the wizard adds two right-mouse actions to the drawing page. To start or stop the continuous refresh, right-click the drawing page when no shapes are selected, then choose the action of want.

The NOW function goes out of date at an interval you set in the VISIO.INI file. Each time the NOW function goes out of date, it returns the current date and time and runs the Database Refresh Add-on, which refreshes the values in the linked ShapeSheet cells.

Tip: To set the interval at which the NOW function goes out of date, change the Animation setting in the [application] section of the VISIO.INI file. The default setting is 60000 milliseconds (one minute).

For details about how adding actions and events affects the drawing page ShapeSheet spreadsheet, choose Help > Visio Help, click Index, then type "Database Wizard actions and events."

