

## Organization Chart Template

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Each organization chart position shape, except the Executive shape, has a control handle you can use to connect the shape to other shapes and indicate a reporting relationship.

### To connect organization chart shapes:

1. Select a position shape you want to connect to a superior shape in the chart.
2. Place the pointer over the control handle on the selected shape. When the pointer changes to a four-way arrow, drag a line out of the selected shape to a connection point (☒) on the superior shape.

The control handle turns red, indicating that the connector is glued to the shape.

See also:

[About creating and revising connected drawings](#)

### Formatting an organization chart

#### To format all of an organization chart's shapes at once:

1. Click the page where there are no shapes.
2. Right-click the page, then choose Orgchart Properties.
3. Choose the options you want for hiding or showing boxes and dividers, and for connector offset.

**Tip:** You can change the appearance of any individual shape in an organization chart by right-clicking the shape, then choosing the Configure [Position name] command.

### Making separate departmental organization charts

In a Visio organization chart, you can link a Manager position shape in the main chart to a separate page in the same drawing, then show the reporting structure of the manager's department in detail on the linked page.

#### To create a linked department on a separate page:

1. Right-click the manager shape you want to link, then choose Make Department.
2. Under Department Name, type the name of the new page, then click OK.

Visio creates a new page and moves a copy of the manager shape and all the shapes that report to it to that page.

To jump from the new page to the main chart, right-click the page, then choose Go To Page-1. To jump from the linked shape in the main chart, right-click the shape, then choose Go To Page-2. (If you named your pages something besides Page-1 and Page-2, those names appear in the menus.)

See also:

[Adding, modifying, and deleting hyperlinks](#)

### Generating organization charts from data files

If you have an employee data file in Microsoft Excel (.xls, .xlt) or text (.txt) format, or if you have the data in a database created in an ODBC-compliant application, you can run the Organization Chart Wizard to generate an organization chart from the data.

#### To run the wizard:

- With the Organization Chart Template open, choose Tools > Organization Chart Wizard. For help with a wizard screen, click More Info.

See also:

[Creating organization charts from data files](#)

### **Organization chart shape properties**

By default, each position shape in an organization chart has two property fields associated with it: Department and Telephone Number. You can enter data into the fields by right-clicking any position shape, then choosing Properties from the shortcut menu.

To associate additional data with your organization chart shapes (for example, home address or salary), you can run the Custom Properties Editor to add properties.

#### **To run the Custom Properties Editor:**

- Choose Tools > Macro > Custom Properties Editor.

See also:

[Adding, editing, and deleting custom-property fields](#)

### **Generating reports from properties**

If you've entered data for the properties associated with your organization chart shapes, you can run the Property Reporting Wizard to generate inventory or numerical reports based on the data. For example, you could calculate the average salary for a particular department or you could create an internal telephone directory to distribute to your employees.

#### **To run the Property Reporting Wizard:**

- Choose Tools > Property Report.

See also:

[Creating reports from custom data](#)

### **Placing Visio drawings on the World Wide Web**

You can easily convert a Visio drawing to a format Web browsers can read. Then you can distribute the drawing on an intranet or the Web.

See also:

[Exporting shapes and drawings in .jpg or .gif format](#)

[Saving drawings as HTML pages](#)

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