

# Microsoft Visio

## Create a Visio Organizations Chart using an existing data source.

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1. Enter your data into Excel in columns with a single row of headings. These headings will become field names when you create the organization chart in Visio. The only required fields are a field for the person's name (**Name**) and a field for the person to whom they report (**Reports To**). Include other fields as needed, such as the Title field that appears in the example below.

	A	B	C
1	Name ▼	Title ▼	Reports To ▼
2	John L.	CEO	
3	Ellen B.	VP Marketing	John L.
4	Alex W.	VP Finance	John L.
5	Josh B.	VP Sales	John L.
6	Rick N.	Director of Marketing	Ellen B.
7	Juliette S.	Director of Client Development	Ellen B.
8	Michel T.	Director of Research	Ellen B.
9	Sheila B.	Senior Sales Manager	Josh B.
10	Julie k.	Global Sales Leadership Director	Josh B.
11	Baerd P.	Director of Finance	Alex W.

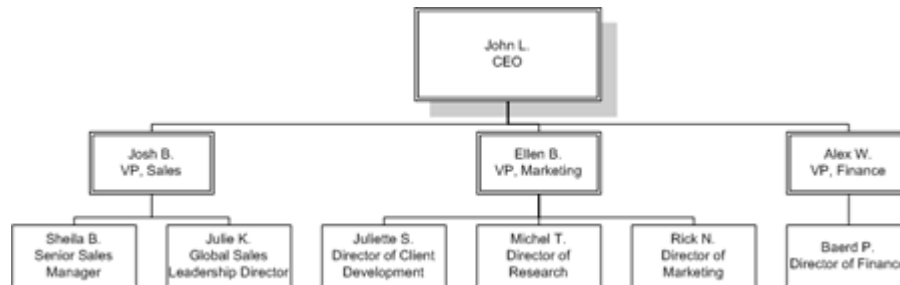
2. In Visio, Click **File > New > Business > Organization Chart Wizard > Create**
3. Click **Next** at the first screen to select data from an existing source file. Notice that data can be in an Excel file, a text file, a Microsoft Office Exchange Server directory, or a database.
4. At the second screen, select the option that includes **Excel file** and then click **Next** again. Browse to and select your file, and then click **Next** once more.

**Note:** You must close the Excel document that you created before you upload it to Visio.

4. Once Visio accesses your data, it will attempt to match field names (column headings) to the **Name** and **Reports To** fields for the organization chart. Confirm that Visio has selected the correct fields and then click **Next**.

At this point, you can just click **Next** until the **Finish** button becomes available and then click **Finish** to generate your chart. However, make sure you review each screen before you click Next.

When the organization chart is generated from the sample data shown in the preceding steps, it looks like this.



**Note:** You can copy and paste this chart into Word and PowerPoint, but in order for it to work correctly, you must make sure you highlight it completely before you copy and paste.