

Downloading the Org Chart to MS Visio using Internet Explorer

Please note, these instructions are written with the understanding that the user is familiar with the MS Visio software. If you need help with how to use MS Visio or if you need access to the MS Visio software, please contact your departmental IT Manager.

1. Log into the **myUCF portal** (my.ucf.edu).

S UNIVERSITY OF CENTRAL FLORIDA		UCF SIGN IN +	Search UCF	Q
UCF Federated Identity				
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By signing on, you agree to the terms of the UCF Information Technologies and Resources Policy.		Trouble Signing On?		ø
	UNIVERSITY OF CENTRAL FLOR	IDA		

2. From the myUCF Menu click on the UCF Company Directory link.

S UNIVERSITY OF C	ENTRAL FLORIDA	UCF Search UCF	•
Home Page Student	Message Center Online Course Tools Dashboards Informationa	I Resources	
Academic Resources Staff Applications Staff Applications Student Self Service Manager Self Service Manager Self Service My Content Content Management Reporting Tools Change my NID Password	Org Chart Viewer Company Directory	(9) A	Preferences
Knights Email UCF Home Page UCF COM Home Page UCF Company Directory	<u> </u>		



3. In the Search field, search for the person's Org Chart you like to download.

Student M	UTRAL FLORIDA	Search UCF	
Academic Resources Staff Applications Student Set Service	Org Chart Viewer Company Directory		Preferences
Employee Self Service Manager Self Service Paraculty/Advisor Self Service Paraculty/Advisor Self Service My Content Management Content Content Management Content Management Content Managem		Advanced Search My Org Chart	

Note: If you want to produce an org chart of an entire department, make sure the person in the top tier is head of the department.

4. Click on the **xl** icon

Advanced Search My Org Chart		Freferences
	Kurt Weller Assistant Director HRIS Org Chart Department: HM RES-PAYROLL Vears of Service: 7.1 Directs: 3 / Total: (3)	
Jane Doe HRIS Analyst Senior Torg Chart Department: HM RES-PAYROLL Varar of Senice: 5.7 Directs: 0 / Total: (0)	Tasha Zapata HRIS Analyst Senior Department: HM RES-PAVROLL Years of Service: 10.2 Directs: 0 / Total: (0)	Edgar Reed HRIS Analyst Senior Org Chart Department: HN RES-PAYROLL Yeard 65 exrice: 1.4 Directs: 0 / Total: (0)



The ExportData (2).csv download has completed.

5. Then select the CSV for Visio radio button and click Ok.

Favorites 👻	Main Menu 👻	>	Company Directory >
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Export			
File Type (?)		
O CSV for	Excel		
● CSV for	Visio		
ОК	Cancel		

6. A browser pop up window will appear at the bottom of your screen. Click **Save**.



8. Launch MS Visio 2016 and select the **Organization Chart template**, then click **Create**.

Open 🔻 Open folder

View downloads





9. An Organizational Chart window appears; select the option for the **Organization Chart Wizard** and select **Create**.



10. The Organization Chart Wizard will open, step through as follows:





11. Select the second option: A text, Org Plus (*.txt), or Excel file, click Next.

Organization Chart ¹	Nizard	×
-	My organization information is stored in:	
	A Microsoft Exchange Server directory A text. Ora Plus (5,td), or Excel file	<u>^</u>
	An ODBC-compliant data source	
		ų.
THE OWNER WATER OF	Note	
	To ensure that your data is formatted correctly, click the Help button.	
-		
		-
0	Cancel < Back Next >	Finish

12. Browse to where the **ExportData.csv** file was saved. Change the File Type to **All Files**, then locate the file and click **Open**.

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13. Verify the path, click **Next**.

Organization Chart Wizard			×
	Locate the file that con	tains your organization information.	
	C:\Users\/ Me \Dov	wnloads\ExportData (2).xlsx	
			Browse
	Specify the language:	English (United States)	~
		Cancel < Back Next >	Finish

14. Leave default, click Next.

Choose the co organization.	lumns (fields) in your data file that contain the inf	ormation that defines the
Name:	Name	~
Reports to:	ReportsTo	~
First name:	<none></none>	~
The Name co	lumn (field) contains data that identifies the perso	n.



15. Choose the file columns as needed, click Next.

Organization Chart Wiz	ard Choose the columns (field	ls) from your (data file that yo	ou want to display.	×
	Data file columns:			Displayed fields:	
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16. Leave as default, click Next.

You can import pictures from yo	ur computer or a network location:	_
Don't include pictures in r Locate the folder that con	ny organization chart	
		Browse
Match pictures based on:	Name	×
Note Picture files must be named in	n the following way: MatchField.FileTy	pe
For example if you match to " "JohnSmith.png". If you match	name" the picture filenames could be h to Email they could be "jsmith@cont	called oso.com.jpg".
		_



17. Leave as default, click Finish.

1		×
Your organization data may co drawing. You can specify how can let the wizard define each	ntain too many employees to fit much of your organization to di page automatically.	on one page of your isplay on each page or you
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Name at top of page:	<top executive=""></top>	~
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18. And there you have it

	A H Kurt V	ssistant Director RIS 4 Veller	
	HRIS Analyst		HRIS Analyst
Coor Hum Res/Per 13.3 Jane Doe	Senior 5 Tasha Zapata	HRIS Analyst 9.5 Edgar Reed	Senior 0.7 Pat Terson

Please Note:

- The more direct reports and indirect reports the person has the more Visio charts it will create. Make sure to review the extra pages/tabs MS Visio creates.
- For help with the output please visit the HR Company Directory site (http://hr.ucf.edu/company-directory/) and review the FAQs.