

Creating Organization Charts in HRIS

HRIS has the ability of produce organization charts. This option is provided to those departments that do not have a current method for producing organization charts.

To view an organization chart on-line, follow steps 1 and 2. To print an organization chart, install Microsoft Visio and follow steps 1-5.

Step 1: Run and Review Position Reports to Listing for accuracy.

It is important that each individual has the correct supervisor identified in HRIS to produce an accurate organization chart. Run and review the Position Reports to Listing to ensure this information is correct. If supervisor is not identified or not accurate, the Organization Chart will be incomplete. [Workforce Administration](#) > [Workforce Reports](#) > [Position Reports to Listing](#)

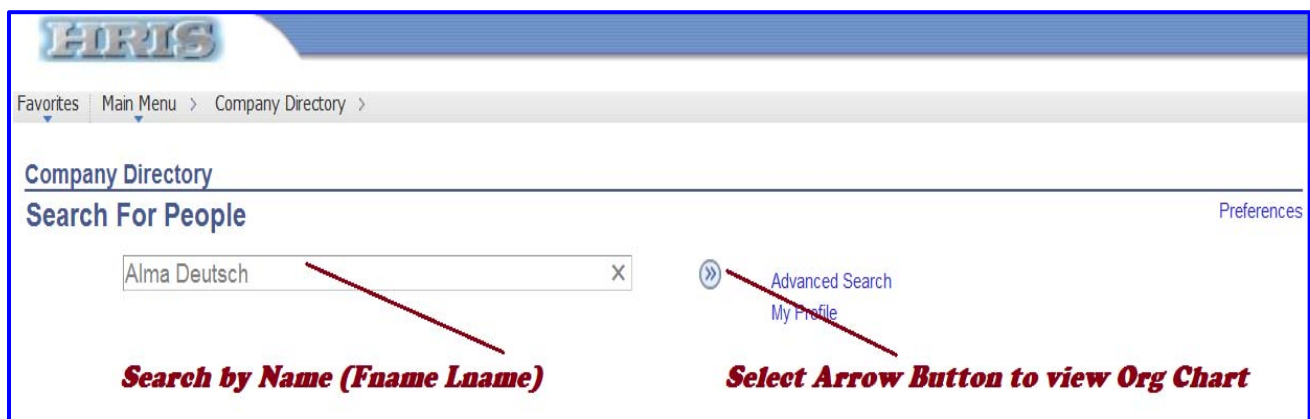
If updates are necessary, wait a day before proceeding to Step 2. HRIS Organization Chart data is refreshed every night ... Monday through Friday.

Step 2: Create Organization Chart

To create organization chart, access [Main Menu](#) > [Company Directory](#) (wait for page to load ... it may take a full minute).



Search for People by entering a Name (Fname Lname) ... select Arrow Button to view Organization Chart on-line. Note: Entering the name of a department/unit head will provide a multiple page organization chart versus entering the name of a supervisor with one or two direct reports.



Views: Profile Tab and Org Chart Tab ... these tabs provide on-line views.

Profile Tab

Contact Information

Deutsch, Alma M

Job Title Program Director

Location Human Capital Services

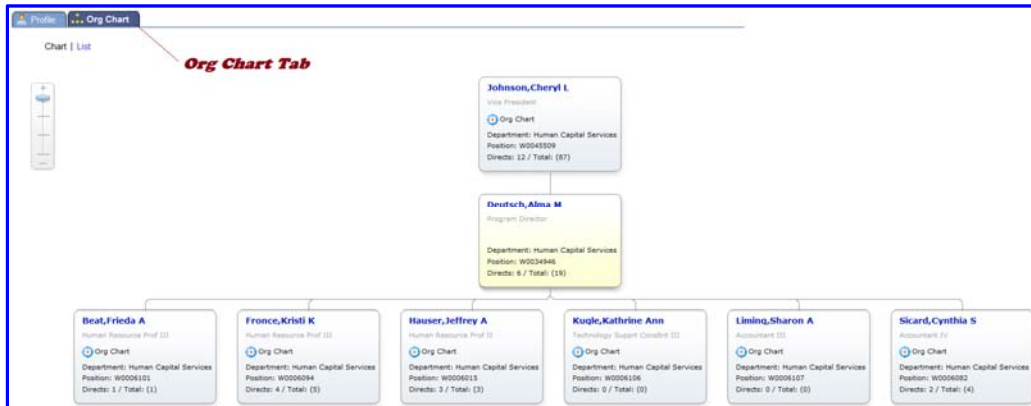
Position W0034946

HR Details

Department Human Capital Services

Reports To Johnson, Cheryl L.

Direct Reports (6) Beat, Frieda A, Fronce, Kristi K, Hauser, Jeffrey A, Kugle, Kathrine Ann, Liming, Sharon A, Sicard, Cynthia S



Step 3: Print Organization Chart - This process requires installation of Microsoft Visio.

After creating and viewing organization chart on-line, click on Microsoft Excel button and Export to CSV by turning on the radio button **CSV for Visio** ... select **OK**.

Org Chart Viewer

Company Directory | Direct-Line Reports

Search by Name, Job Title, Department, or Email

Advanced Search
My Org Chart

Preferences

Export to CSV

File Type ?

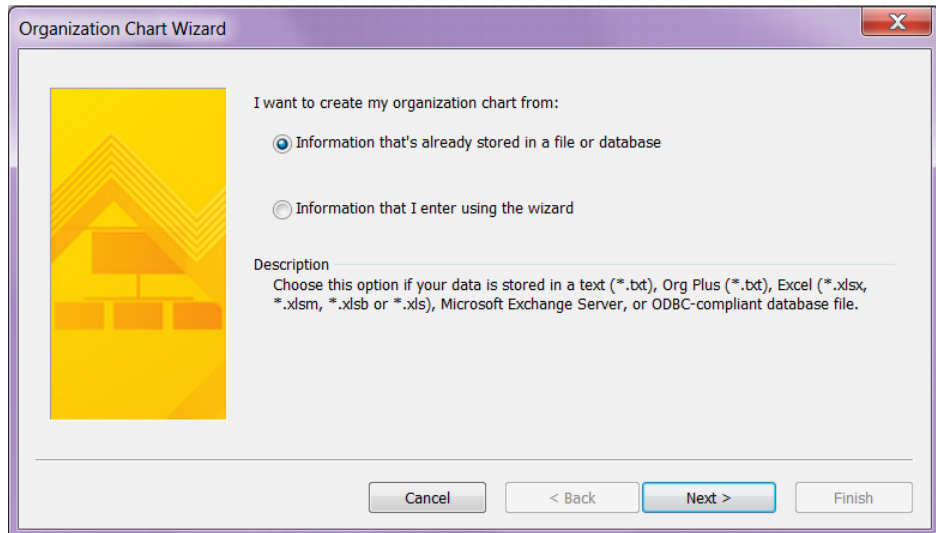
CSV for Excel

CSV for Visio

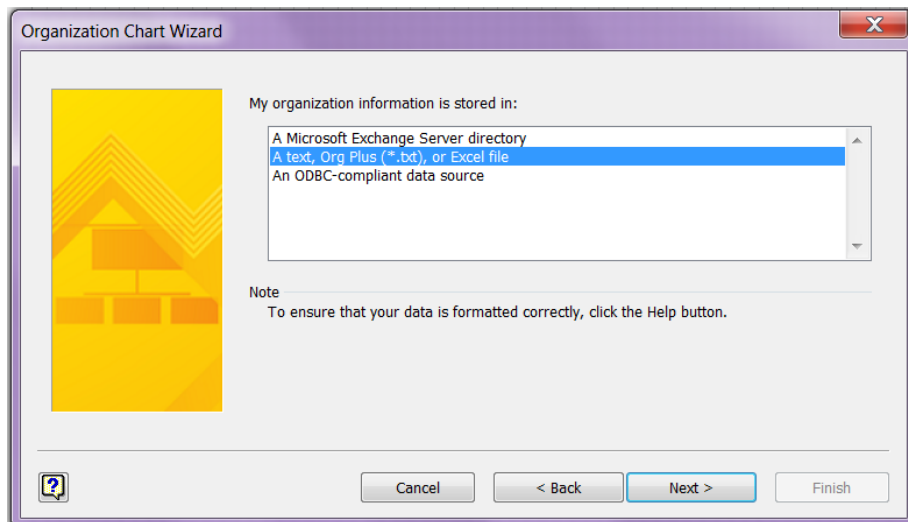
OK Cancel

Step 4: When spreadsheet appears, save it as a Microsoft Excel file.

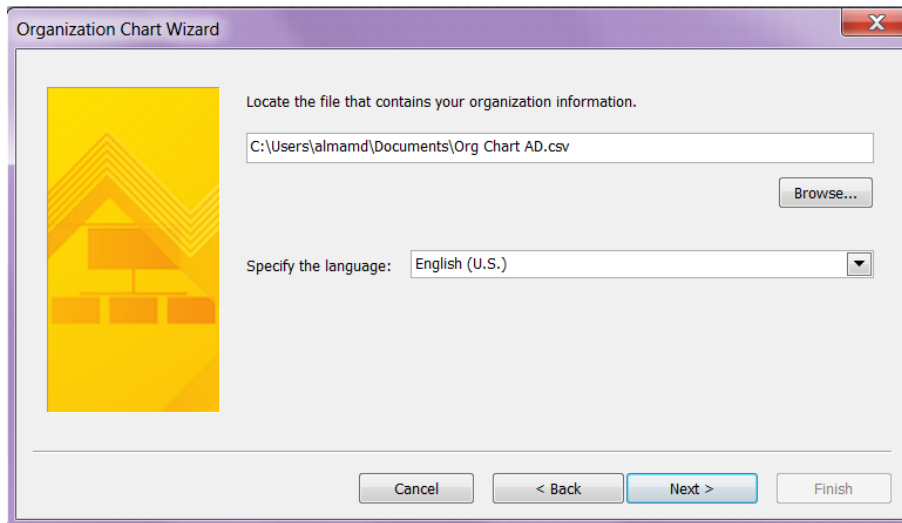
Step 5: Open Microsoft Visio ... create (File > New > double click on Org Chart template) ... import Microsoft Excel file and follow Organization Chart Wizard steps.



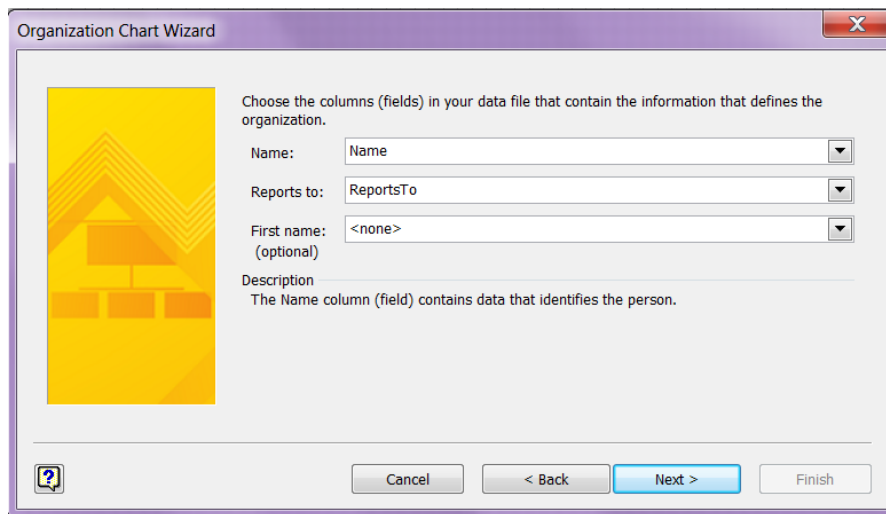
Click **Next**, and follow the remaining steps of the wizard.



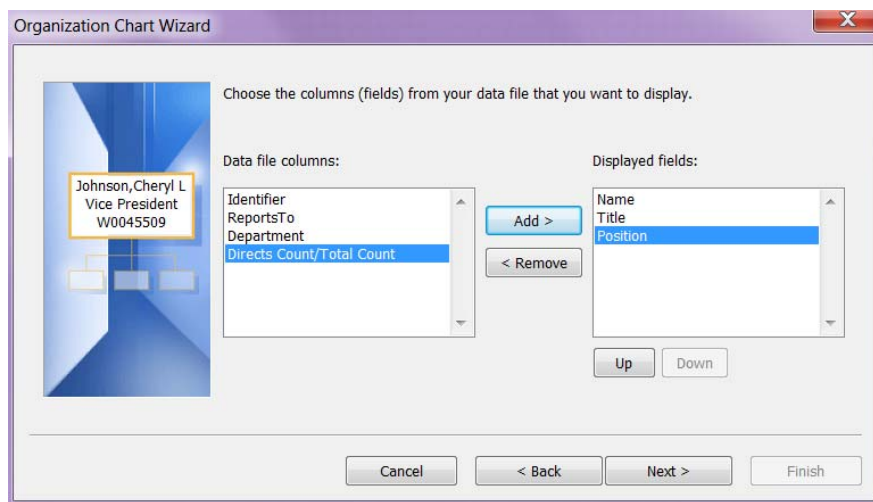
Click **Next**, and follow the remaining steps of the wizard.



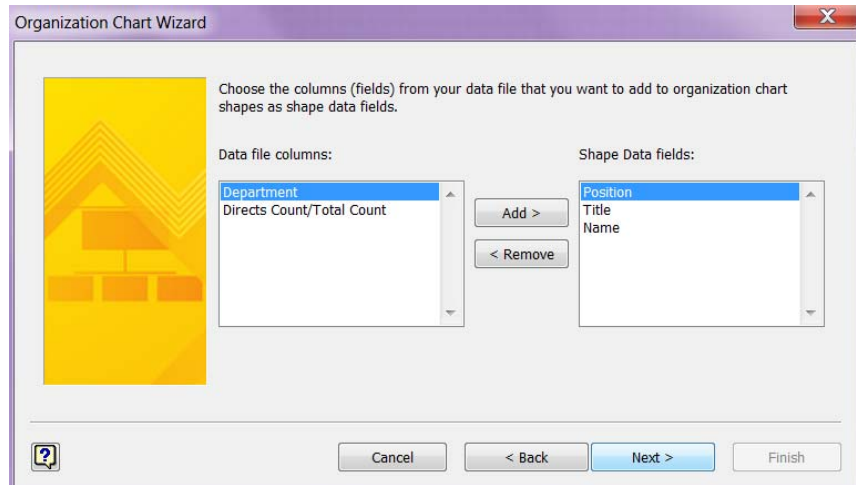
Click **Next**, and follow the remaining steps of the wizard.



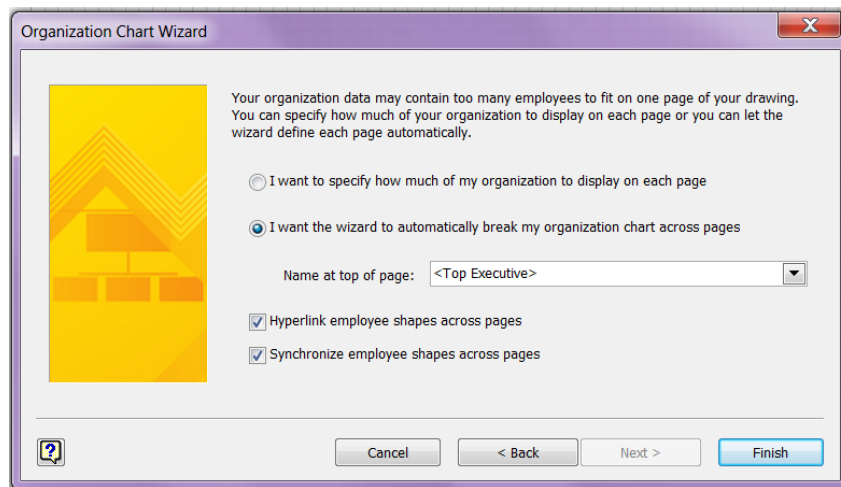
Click **Next**, and follow the remaining steps of the wizard.



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Click **Finish** for organization chart to appear.

Questions may be directed to Human Capital Services at 785.532.6277.