

SharePoint/Visio – Create organizational chart based on a SharePoint list

With the 2010 version, SharePoint and Visio can interoperate.

In this post, I will show you how to use Visio to generate an organization chart based on SharePoint contact list.

To do that, you need **SharePoint 2010** (at least Foundation Server) and **Visio 2010**.

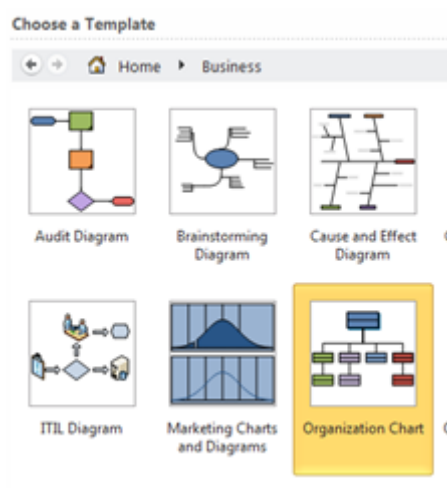
Create the source contact list

Connect to your SharePoint site and create a **Contact** list. I don't do any customization on this list '(ie adding/deleting field) but you can do for matching your need.



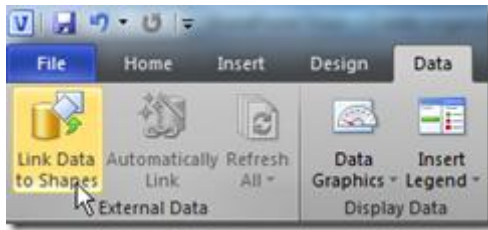
Create the organization chart

Launch Visio 2010 and choose to create an organizational chart (**Business\Organization Chart**)



Define the data source

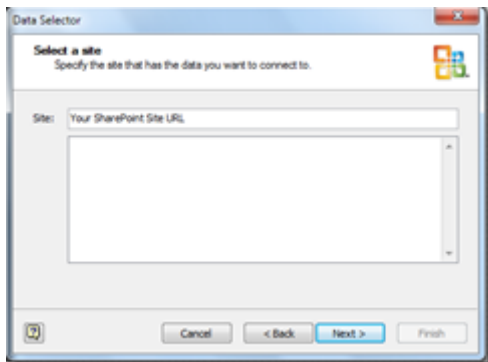
Click on the **Data** tab and choose **Link Data to Shapes**



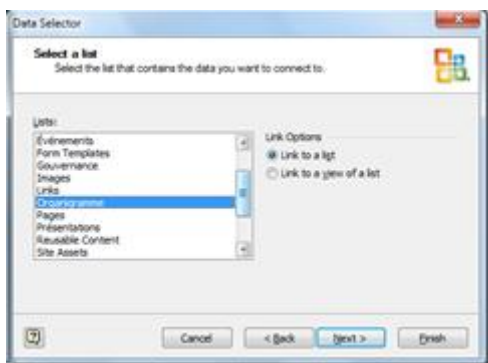
Choose **Microsoft SharePoint Foundation list** and follow the wizard



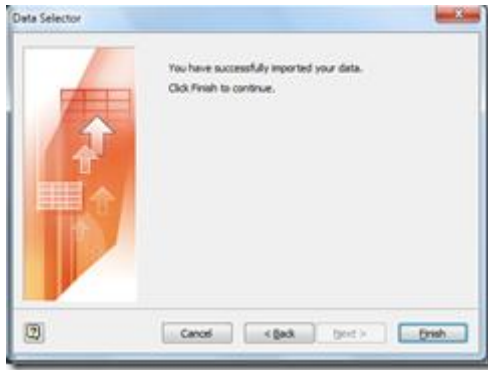
Enter the URL of your SharePoint site hosting the contact list



Select the contact list you have previously created



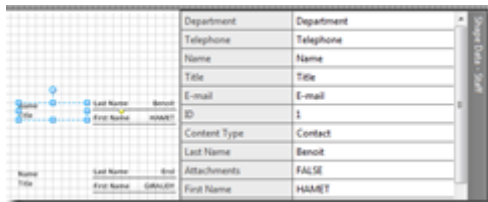
That's it



Data are automatically retrieved from the SharePoint list

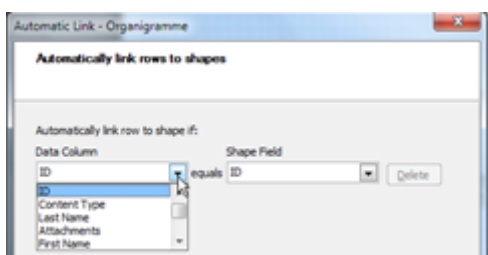
ID	Content Type	Last Name	Attachments	First Name	Full Name	E-mail Address
1	Contact	Benoit	FALSE	HAMET	Benoit H...	benoit@ham...
2	Contact	Erol	FALSE	GRALUDY	Erol GRA...	

Then you just have to drag and drop these data onto your Visio Shape and manage the organization chart

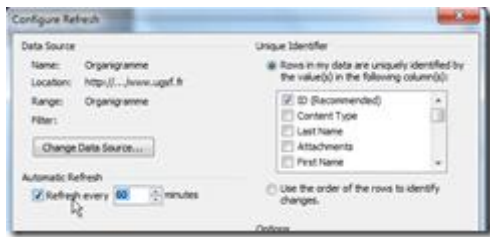
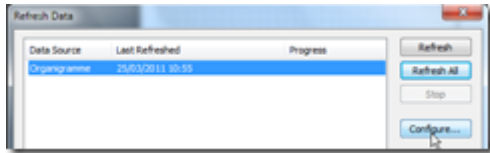
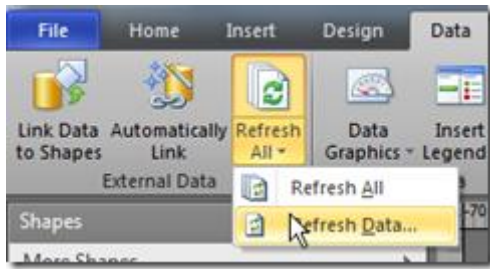


As Visio Organization Shape are already provided with attributes, you may have to manage the link with your data source (and off course, also if you have added some additional fields on your list)

To perform this action, you can use the **Automatically link external data** wizard



To keep the organizational chart data up to date, configure automatic data refresh



Finally, you can publish your Visio organization chart onto SharePoint to provide it on your intranet

