# 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.

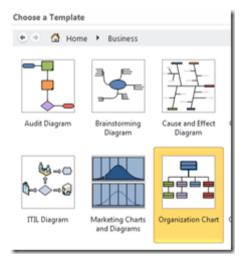
### Create the source contact list

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.

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## 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

|       | tor each task be data you want to connect to. |
|-------|---|
| Site: | Your SharePoint Site URL                      |
|       |   |
|       | Cancel < Back Next > Finish                   |

Select the contact list you have previously created

| Later  |       |   |
|--|-------|---|
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Data are automatically retrieved from the SharePoint list

| 5 | D | Content Type | Last Name | Attachments | First Name | Full Name | E-mail Addre |
|---|---|--------------|-----------|-------------|------------|-----------|--------------|
|   | 1 | Contact      | Benoit    | FALSE       | HAMET      | Benoit H  | benoit@ham   |
| 2 | 2 | Contact      | Erol      | FALSE       | GRAUDY     | Erol GIRA |              |

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

|       |            |                | Department   | Department | A 10 |
|-------|------------|----------------|--------------|------------|------|
|       |            |                | Telephone    | Telephone  | 18   |
|       |            |                | Name         | Name       | 18   |
|       |            |                | Title        | Title      |      |
|       | C Lot Kenn | ad Narte Benot | E-mail       | [-mail     | -1   |
|       | fre hand   |                | 1D           | 1          |      |
|       | -          |                | Content Type | Contact    |      |
|       |            |                | Last Name    | Benoit     |      |
| Name  | Led Norte  | 6-1            | Attachments  | FALSE      |      |
| Title | fire fame  | GANGER         | First Name   | HAMET      |      |

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

| File  | Home                                     | Insert                | Design | Data                         |
|---|--|-----------------------|--------|------------------------------|
| to Shapes   | Automatically<br>Link                    | Refresh<br>All *      |        | Insert<br>Legend +<br>v Data |
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| Automatical<br>Data Colum<br>ID<br>Content Typ<br>Last Name<br>Attachment<br>First Name | pe au                                    | Shape Field<br>als 10 |        | Quiete .                     |

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

| File                   | Home                            | Insert                           | Design   | Data                     |
|------------------------|---------------------------------|----------------------------------|--|--------------------------|
|                        | -                               |                                  |  | ==                       |
| Link Data<br>to Shapes | Automatically<br>Link           | Refresh<br>All *                 | Data<br>Graphics *   | Insert<br>Legend         |
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| Data Source            | Last Refreshed                  | Prog                             |  | Reten                    |
| Organigramme           | 25/03/2011 10:55                |                                  |  | Refresh All              |
|                        |                                 |                                  |  | Stop                     |
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| Automatic Refresh      |                                 |                                  | corder of the rows to id                                       |                          |
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Finally, you can publish your Visio organization chart onto SharePoint to provide it on your intranet

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