Creating Visio Files from Excel Org Tree Files

1. The Org Tree files are located at https://controller.berkeley.edu/accounting-controls/chart-

accounts/organization-tree-reports. They are updated monthly to include the changes created during the previous month. Click on the Business Unit 10000 Org Trees link to download a copy of the file (see screenshot below).

Organization Tree Reports

Two types of organization tree reports are available for download.

1. Manually-Produced Excel Reports

These files have changed as of January 2013. Both the BU 10000 and BU J0000 files now include separate worksheets containing a flat version of the data and a pivot table of the data for easier viewing. The Business Unit 10000 contains flat and pivot worksheets for the currently effective BFS Master Org Tree and the FY13 Legacy Master Org Tree (as of 6-38-2013). A third file is also provided which provides the list of Journal Source IDs and the associated routing org nodes.

Please note that Org Node (L2, L3, L4, L5 & L6) and DeptID (L7) descriptions were updated effective August 1, 2013

1. Business Unit 10000 Org Trees - Current and Legacy Trees (updated October 2013)

- Business Unit J0000 Org Tree (updated May 2013)
 Journal Source ID Table (updated August 2013)
- a. The file contains four tabs: (1) A flat file of detailed data from the most recent Org Tree including all active DeptIDs (L7) and their location in the tree for the levels above up to L2 (L2 L6); (2) a pivot table of the most recent tree consolidating the levels into a tree format; (3) a flat file of the legacy tree dated 06-28-2013; and (4) a pivot table of the legacy tree data.
- b. For this exercise, you will be using tab #1.
- 2. The flat file data will need to be converted to a slightly different format so that it can be used as a source file for a Visio of the tree.
 - a. The current format shows each individual DeptID and all of its ancestors in one row as shown below (12 columns; 1 for each level and description):

Org L2 Control Unit Node	Org L2 Control Unit Desc	Org L3 Division Node	Org L3 Division Desc	Org L4 Department Node	Org L4 Department Desc	Org L5 Discipline Group Node	Org L5 Discipline Group Desc	Org L6 Sub Unit Node	Org L6 Sub Unit Desc	Org L7 DeptID Code	Org L7 DeptID Desc
CAMSU	Campus Support	CHANL	Campus Support Core	AACHN	Chanc Office	AACHO	Chancellor's Immediate Office	AACH6	Chancellor's Immediate Ofc-L6	10000	AACHN Chanc Off Gen Admin
CAMSU	Campus Support	CHANL	Campus Support Core	AACHN	Chanc Office	AACHO	Chancellor's Immediate Office	AACH6	Chancellor's Immediate Ofc-L6	10001	AACHN Campus Memberships
CAMSU	Campus Support	CHANL	Campus Support Core	AACHN	Chanc Office	AACHO	Chancellor's Immediate Office	AACH6	Chancellor's Immediate Ofc-L6	10002	AACHN Chancellor Commitment
CAMSU	Campus Support	CHANL	Campus Support Core	AACHN	Chanc Office	AACHO	Chancellor's Immediate Office	AACH6	Chancellor's Immediate Ofc-L6	10003	AACHN Events Mgmnt

b. The format needed for the Visio file will require a child/parent relationship (four columns; 1 for the child, 1 for the child description, 1 for the parent and 1 for the parent description) for each of the levels in the tree. So for DeptIDs 10000 through 10003 and their parents above, the format will need to be:

					-
	Α	В	С	D	Ι
1	Child	Child Description	Parent	Parent Description	
2	10000	AACHN Chanc Off Gen Admin	AACH6	Chancellor's Immediate Ofc-L6	
3	10001	AACHN Campus Memberships	AACH6	Chancellor's Immediate Ofc-L6	
4	10002	AACHN Chancellor Commitments	AACH6	Chancellor's Immediate Ofc-L6	
5	10003	AACHN Events Mgmnt	AACH6	Chancellor's Immediate Ofc-L6	
6	AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office	
7	AACHO	Chancellor's Immediate Office	AACHN	Chanc Office	
8	AACHN	Chanc Office	CHANL	Campus Support Core	
9	CHANL	Campus Support Core	CAMSU	Campus Support	
10	CAMSU	Campus Support			

- c. To do this you need to do the following:
 - i. Setup the source file to have the correct headings:

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ii. Copy the data from the lowest level (L7) and paste into the child column of the source file:

Org L7 DeptID C	Code Org L7 DeptID Desc		Α	В	С	D
10000	AACHN Chanc Off Gen Admin	1	Child	Child Description	Parent	Parent Description
10001	AACHN Compus Memberships	2	10000	AACHN Chanc Off Gen Admin		
10001	Accine campus memberships	3	10001	AACHN Campus Memberships		
10002	AACHN Chancellor Commitments	4	10002	AACHN Chancellor Commitments		
10003	AACHN Events Mgmnt	5	10003	AACHN Events Mgmnt		

iii. Then, copy the next level data (L6) and copy into the parent column, this can also be copied into the next level for child data:

		1	Child	Child Description	Parent	Parent Description
Org 16 Sub Unit Nodo	Org 16 Sub Unit Doco	2	10000	AACHN Chanc Off Gen Admin	AACH6	Chancellor's Immediate Ofc-L6
OIR LO SUD OIIIL NOUE	OIR LO SUD OIIIL DESC	3	10001	AACHN Campus Memberships	AACH6	Chancellor's Immediate Ofc-L6
AACH6	Chancellor's Immediate Ofc-L6	4	10002	AACHN Chancellor Commitments	AACH6	Chancellor's Immediate Ofc-L6
AACUC	Change II and a low manifester Of a LC	5	10003	AACHN Events Mgmnt	AACH6	Chancellor's Immediate Ofc-L6
AACHO	Chancellor's Immediate OfC-L6	6	AACH6	Chancellor's Immediate Ofc-L6		
AACH6	Chancellor's Immediate Ofc-L6	7	AACH6	Chancellor's Immediate Ofc-L6		
44000	channella de la serie dista oferto	8	AACH6	Chancellor's Immediate Ofc-L6		
ААСНЬ	Chancellor's Immediate OfC-L6	9	AACH6	Chancellor's Immediate Ofc-L6		

A

С

D

В

iv. Continue doing that for each level until you get to the top level. For the top level, there will not be a parent:

Child	Child Description	Parent	Parent Description
10000	AACHN Chanc Off Gen Admin	AACH6	Chancellor's Immediate Ofc-L6
10001	AACHN Campus Memberships	AACH6	Chancellor's Immediate Ofc-L6
10002	AACHN Chancellor Commitments	AACH6	Chancellor's Immediate Ofc-L6
10003	AACHN Events Mgmnt	AACH6	Chancellor's Immediate Ofc-L6
AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
AACHN	Chanc Office	CHANL	Campus Support Core
AACHN	Chanc Office	CHANL	Campus Support Core
AACHN	Chanc Office	CHANL	Campus Support Core
AACHN	Chanc Office	CHANL	Campus Support Core
CHANL	Campus Support Core	CAMSU	Campus Support
CHANL	Campus Support Core	CAMSU	Campus Support
CHANL	Campus Support Core	CAMSU	Campus Support
CHANL	Campus Support Core	CAMSU	Campus Support
CAMSU	Campus Support		

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- v. Since there are multiple DeptIDs that roll up to higher level Orgs, you will have duplicates in the child column. For each row, you want to have only one unique value. To do this, you will need to remove any duplicates in the child columns.
 - 1. To do this, you need to select all of the columns:

	А	В	С	D
1	Child	Child Description	Parent	Parent Description
2	10000	AACHN Chanc Off Gen Admin	AACH6	Chancellor's Immediate Ofc-L6
3	10001	AACHN Campus Memberships	AACH6	Chancellor's Immediate Ofc-L6
4	10002	AACHN Chancellor Commitments	AACH6	Chancellor's Immediate Ofc-L6
5	10003	AACHN Events Mgmnt	AACH6	Chancellor's Immediate Ofc-L6
6	AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
7	AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
8	AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
9	AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office
10	AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
11	AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
12	AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
13	AACHO	Chancellor's Immediate Office	AACHN	Chanc Office
14	AACHN	Chanc Office	CHANL	Campus Support Core
15	AACHN	Chanc Office	CHANL	Campus Support Core
16	AACHN	Chanc Office	CHANL	Campus Support Core
17	AACHN	Chanc Office	CHANL	Campus Support Core
18	CHANL	Campus Support Core	CAMSU	Campus Support
19	CHANL	Campus Support Core	CAMSU	Campus Support
20	CHANL	Campus Support Core	CAMSU	Campus Support
21	CHANL	Campus Support Core	CAMSU	Campus Support
22	CAMSU	Campus Support		
23	CAMSU	Campus Support		
24	CAMSU	Campus Support		
25	CAMSU	Campus Support		
The	n, click o	on Remove Duplicates from the	Data ta	b in the ribbon:

File	Но	me	Insert Pag	ge Layout I	ormulas	Data Revie	w	View	Develop	er Smart Vi	ew Ac	robat								
From Access	From Web	From Text	From Other Sources *	Existing Connections	Refresh All *	 Connections Properties Edit Links 	2↓ ⊼↓	A Z A	Filter	🕷 Clear 🐌 Reapply 🏂 Advanced	Text to Columns	Remove Duplicates	Data Validation	Consolidate	What-If Analysis *	Group	Ungroup	Subtotal	 ●∃ Show Detail ■∃ Hide Detail 	?₄ Solver Ila Data Analysis
		Get Ext	ernal Data		C	onnections			Sort & Filt	er			Data Tool	s			C	outline	5	Analysis

3. Select to remove duplicates from the Child and Child Description columns and hit OK:

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Juplicates.	
Select <u>All</u>	ect All My data has headers
Columns	
Child	
Child Description	
Parent	
Parent Description	
Parent Parent Parent Description	

4. All of the duplicates will be removed and only unique values will remain:

	А	В	С	D	
1	Child	Child Description	Parent	Parent Description	l
2	10000	AACHN Chanc Off Gen Admin	AACH6	Chancellor's Immediate Ofc-L6	
3	10001	AACHN Campus Memberships	AACH6	Chancellor's Immediate Ofc-L6	
4	10002	AACHN Chancellor Commitments	AACH6	Chancellor's Immediate Ofc-L6	
5	10003	AACHN Events Mgmnt	AACH6	Chancellor's Immediate Ofc-L6	
6	AACH6	Chancellor's Immediate Ofc-L6	AACHO	Chancellor's Immediate Office	
7	AACHO	Chancellor's Immediate Office	AACHN	Chanc Office	
8	AACHN	Chanc Office	CHANL	Campus Support Core	
9	CHANL	Campus Support Core	CAMSU	Campus Support	
10	CAMSU	Campus Support			

- 5. Save the file and close it. Note: The excel must be closed in order to retrieve the data to create the Visio file.
- 3. Open Visio to create the Visio file.

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a. Select "New" on the "File" Tab, then select "Business"



b. Select "Organization Chart Wizard", then select "Create"

File Home Insert	Design Data Process Review View Acrobat	
Save	Choose a Template	Organization Chart Wizard
Save as Adobe PDF	🔄 👻 🚮 Home 🔸 Business	Using this wizard, create diagrams for human resources management, staff organization, office administration, and
💕 Open		management structures.
🖬 Close Info		
Recent	Audit Diagram Brainstorming Cause and Effect Charts and Graphs EPC Diagram Fault Tree Analysis	
New	Diagram Diagram Diagram	
Print		
Save & Send Help		
Dptions	ITIL Diagram Marketing Charts Organization Chart Organization Chart PivotDiagram Six Sigma Diagram	
X Exit		Metric Units
	TQM Diagram Value Stream Map	© US Units

c. A wizard Dialogue box will appear, select "Information that's already stored in a file or database" and select "Next"

Creating Visio Files from Excel Org Tree Files

Organization Chart Wizard	
	I want to create my organization chart from: Information that's already stored in a file or database
	Information that I enter using the wizard Description
	Choose this option if your data is stored in a text (*.txt), Org Plus (*.txt), Excel (*.xlsx, *.xlsm, *.xlsb or *.xls), Microsoft Exchange Server, or ODBC-compliant database file.
	Cancel < Back Next > Finish

d. Select "A text, Org Plus (*.txt), or Excel file" and select "Next"

Organization Chart Wizard		X
	My organization information is stored in: A Microsoft Exchange Server directory A text, Org Plus (*.bxt), or Excel file An ODBC-compliant data source Note To ensure that your data is formatted correctly, click the Help button.	•
	Cancel < Back Next > Fi	nish

e. Select "Browse" and locate the excel source file saved in 2.c.v.5 above and select "Next"

Creating Visio Files from Excel Org Tree Files

Organization Chart Wizard		×
	Locate the file that contains your organization information.	
	C:\Users\mwoodson\Desktop\Job Aid - Visio excel source file.xlsx	
	Browse	
	Specify the language: English (U.S.)	
	Cancel < Back Next > Finish	

f. Select "Child" for "Name" and "Parent" for "Reports To" then select "Next"

Organization Chart Wizard	×
	Choose the columns (fields) in your data file that contain the information that defines the organization. Name: Child Reports to: Parent First name: <anone> (optional) Description The First Name column (field) contains the person's first name. The data in this column is combined with the data in the Name column to make the person's full name.</anone>
2	Cancel < Back Next > Finish

g. Select the "Child" and "Child Description" columns for the columns from your data file that you want to display (highlight the column name in the "Data File Columns" box and select "Add" to move them to the "Displayed Fields" box) then select "Next":

Creating Visio Files from Excel Org Tree Files

Organization Chart Wizard				X
10000 AACHN Chanc Off Gen Admin	Choose the columns (fields) from your Data file columns: Parent Parent Description	data file that you Add > < Remove	want to display. Displayed fields: Child Child Description Up Down	•
	Cancel	< Back	Next >	Finish

h. Select "Child" for the Shape Data Fields and select "Next":

Organization Chart Wizard			X
	Choose the columns (fields) from your shapes as shape data fields.	data file that you want to add to organi.	zation chart
	Data file columns:	Shape Data fields:	
	Child Description Parent Description Parent	Add > Child	^
	Cancel	< Back Next >	Finish

i. You can choose to specify how much of your organization to display on each page or let the Wizard choose, then select "Next":

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Organization Chart Wizard	X	
	Your organization data may contain too many employees to fit on one page of your drawing. You can specify how much of your organization to display on each page or you can let the wizard define each page automatically.	
	I want to specify how much of my organization to display on each page	
	\bigcirc I want the wizard to automatically break my organization chart across pages	
	Name at top of page:	
	V Hyperlink employee shapes across pages	
	Synchronize employee shapes across pages	
	Cancel < Back Next > Finish]

j. On this page, you can select how to modify each page. Make changes as needed then select "Finish". *Note: Since the source file only contains a small amount of data that all rollup to the same Orgs above, no additional pages will be needed. However, if you are pulling information for a large Organization with multiple Divisions or Departments, you may want to modify the pages so that each Division or Department appears on a separate page.*

pages, adding new p	pages, or removing pages.			
Add Page	Employee at Top of Page	Additional Levels	Page Name	# Employe
Modify Page	CAMSU	All Subordinates		
Delete Dece				
Delete Page				
Clear All Pages				
Move Up				
Move Down				

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k. The Wizard will then create your Visio chart:



- 4. Printing the Visio Chart (using a larger file for reference on fitting to screen):
 - a. To get the chart to fit to one page and/or fit the space of the drawing better, select "Design" on the ribbon, then select the drop-down arrow below "Size" and select "Fit to Drawing" at the bottom:

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b. A large chart spread across multiple pages will go from this:



O:\Departmental\Budget\RPB Budget\Private\Central Resource Administration\BIBS\COA & OrgTree Requests\Concierge Website Docs_DRAFT WORKING\New files to Emily 2_26_2018\7b Job Aid_Creating Visio files from Org Tree Excel files on BAI website.docx 11 of 15

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- c. Then select "File" on the ribbon, "Print" and "Print Preview"
- d. Then select "Page Setup"



e. Select "Fit to 1 by 1 sheets" (or the number of sheets you need), then select apply:

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age Setup		X
Print Setup Page Size Drawing Scale Page Prop	perties Layout and Routing Shadows	
Printer paper		
Letter: 8.5 in. x 11 in.		
Portrait		
Landscape Setup		
Print zoom		Drawing Page
Fit to I sheet(s) across		
by 1 sheet(s) down	Printer namer: 11 x 8 5 in	(Landscape)
Print	Drawing page: 11.9 x 8.78 in.	(Landscape)
Gridlines	Print zoom: Fit to exactly 1 sheet	
	Apply OK	Cancel

f. The page will go from this to this

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g. To this:

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