Visio Best Practices in Mapping Processes and Requirements

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- Technology & Business PM since 1990’s
- Senior PPM client advisor and trainer
- Microsoft partner technology solutions provider
- PMO Consultant / Trainer and EPMO leader
- Ex-Microsoft (international finance team sr. manager)
- Ex-Deloitte (technology & strategy sr. manager)
- Mergers & Acquisitions project management
Industry Recognized PPM Experts

• Business Intelligence & Dashboards
• Consulting & Advisory Services
• 25 Years of PMO & Technology PPM Implementations
Today’s Agenda

1. The Times They Are a Changin’
2. Make the Most of What You Have – What’s New?
4. Tips & Tricks
5. Audience Q&A Summary & Wrap-Up

Advisicon’s mission is to boost your project management efficiencies by optimizing your processes and technologies, creating measurable results that empower you and your organization.
My experience with Visio can best be described as:

• I use Visio frequently

• I use Visio occasionally

• I’ve used it a few times and prefer Notepad...or PowerPoint
# The Times They Are a Changin’

<table>
<thead>
<tr>
<th>Update Channel</th>
<th>Primary purpose</th>
<th>How often updated with new features</th>
<th>Default update channel for the following products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Channel</td>
<td>Provide users with the newest features of Office as soon as they’re available</td>
<td>Monthly</td>
<td>Visio Pro for Office 365</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Project Online Desktop Client</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Office 365 Business, which is the version of Office that comes with some Office 365 plans, such as Business Premium</td>
</tr>
<tr>
<td>Deferred Channel</td>
<td>Provide users with new features of Office only a few times a year</td>
<td>Every four months</td>
<td>Office 365 ProPlus</td>
</tr>
<tr>
<td>First Release for Deferred Channel</td>
<td>Provide pilot users and application compatibility testers the opportunity to test the next Deferred Channel update</td>
<td>Every four months</td>
<td>None</td>
</tr>
</tbody>
</table>
### Standard Release

![Calendar Icon]

This is the default option where you and your users receive the latest updates when they're released broadly to all Office 365 customers. This gives you extra time to prepare your support staff and users for upcoming changes.

### First Release

![Refresh Icon]

With this option, you and your users can be the first to see the latest updates and help shape the product by providing early feedback. You can choose to have individuals or the entire organization receive updates early.

Are You Ready for Visio 2016?

• If you diagram your workflows in SharePoint Designer 2013, you need to stay on Visio Professional 2013
What’s New in Visio

- Improved search for third party shapes and stencils
- Data Visualizer
- Create PowerPoint slide snippets
- Database Reverse Engineer is back!
- Visio Online
- Simple feedback/suggestion page
- New UML diagrams

- Improved AutoCAD support
- One-step Excel data connectivity
- Information Rights Management protection for Visio files
- Modernized shapes
- Starter diagrams with user tips
- Do things quickly with Tell Me
- Updated diagram templates
Visio Online

• Visio Online offers anywhere access to Visio diagrams via a web browser.

• Users will be able to easily share their processes, floor plans, organizational structure and more with anyone across the organization.

• For IWs who do not have Visio client installed, they can then view the diagrams in full fidelity from nearly anywhere.
Sharing via email is simple...

Share

Share with People

- Step 1: Save your document to a OneDrive location
- Step 2: Share your document. We’ll do this after you’ve finished saving.
Sharing via email is simple...

Our new Project Server deployment process

Ken Loewen  4:23 PM
To: Ken Loewen

Ken Loewen has shared a OneDrive for Business file with you. To view it, click the link below.

Project Server Deployment.vsdx
Email notifications are automatic...

Ken Loewen (Ken.Loewen@Advisicon.com) has accessed 'Project Server Deployment.vsdx'

Project Server Deployment.vsdx
Last modified 11/30/2016
Third-party templates and diagrams

• You can browse or search for new templates and sample diagrams available from select third-party content providers.

• Click File > New to see all featured diagrams.

• You can search for a diagram that you want by typing in the Search box and pressing Enter.

• Sample diagrams and templates from third-party vendors have the vendor's name listed on the thumbnail. Explore what's available!
Best Practice – Use Templates
Providing feedback is easier
New UML diagrams

• New UML component diagrams
  You can create UML component diagrams that show components, ports, interfaces and the relationships between them.

• New UML communication diagrams
  You can create UML communication diagrams that show the interactions between lifelines that use sequenced messages in a free-form arrangement.

• New UML deployment diagrams
  You can create UML deployment diagrams that show the architecture of a deployment of software artifacts to nodes.

Note: The following features are only available to Visio Pro for Office 365 subscribers.
Enhanced AutoCAD support

• Enhanced AutoCAD support
  • Before, Visio supported .dwg and .dxf files from AutoCAD 2007. With this update, you can import or open files that are from any existing version of AutoCAD.

• Improved AutoCAD scaling
  • With this update, you will see scaling improvements when importing AutoCAD files. Just make sure to set a couple of properties first. In AutoCAD, make sure that the active tab is a layout tab, and not the model tab. Also, make sure that the Visio drawing scale is set to the same scale as the AutoCAD viewport scale.

• Faster import of AutoCAD files
  • With this update, you will notice that AutoCAD import speed is greatly improved.

• Instantaneous shape overlay
  • There used to be long delays when working with shapes on top of CAD files. With this update, there’s no delay.

Note: The following features are only available to Visio Pro for Office 365 subscribers.
One-step data connectivity with Excel

Unless otherwise specified, both Visio Pro for Office 365 subscribers and Visio 2016 one-time purchasers get the following new features.
Information Rights Management (IRM)

Unless otherwise specified, both Visio Pro for Office 365 subscribers and Visio 2016 one-time purchasers get the following new features.
Modernized Shapes

Unless otherwise specified, both Visio Pro for Office 365 subscribers and Visio 2016 one-time purchasers get the following new features.
Starter diagrams

Unless otherwise specified, both Visio Pro for Office 365 subscribers and Visio 2016 one-time purchasers get the following new features.
The Oldies but Goodies

• Customize your Quick Access Toolbar (and move below the Ribbon)
• Diagram templates – featured and custom
• Backgrounds and Page Setup options
• Stencils and Shapes
• Auto Connect
Best Practices – Format

• Let the tool help you – use its capabilities
• Use templates and stencils (e.g., from your equipment vendors or an organization standard title block and/or legend)*

• Improve readability
  • Left to right, top to bottom
  • 8 – 12 tasks per page

• Arrows should enter on left, exit on right
  • May take more room but improves readability

• Use Visio’s Align and Position functions (on Home menu)
• Use color (where meaningful)
• Left to right, top to bottom
• Judicious use of color
• More information, consistent with larger size (11 x 17)
Best Practices – Content

• Data import – as a starting point
• Use logical and consistent page IDs
  • Consider relating Page ID to organization structure
• Start all task descriptions with an action-oriented verb
• Be concise
• Don’t try to boil the ocean
• Document, document, document (comments, sources, assumptions)
Best Practices – Process

• Use templates and stencils (e.g., from your equipment vendors)
• Data import --- as a starting point
• Involve all of your stakeholders (Visio Online)
• Document, document, document (comments, sources, assumptions)
• Work efficiently
• Avoid rework
• Avoid “polishing the sneaker”
Customize your Quick Access toolbar

- Turn on New, Open, Save, Save As, Preview and Print, Undo, Redo
- Move it to appear below the Ribbon
Templates – Featured and Custom

• Featured templates – globally searchable, enhanced preview, pinning

• Front and center – if you show the Start screen on start-up

• Default personal templates location
  • File > Options > Save tab
Backgrounds & Page Setup options

• Create a consistent title block, legend, etc.
Auto Connect

You’ve got to enable Auto Connect in two places
Shape Data & Data Linking

- Data presented with shapes
- Shapes changing (color & indicators)

Watch my previous Visio data linking video at: https://www.youtube.com/c/advisicon
Timelines

Watch my previous Visio timelines video at: https://www.youtube.com/c/advisicon
Summary

• Consider Format **AND** Content **AND** Process

• Let your tool(s) work for you
Q&A
Parking Lot
Need More?

Get a Free Project Online Trial

Connect with us

@kloewen

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Wrap up & Survey

Thanks in advance for your thoughtful recommendations for how this presentation can be improved.

Feel free to send follow-up questions to Ken.Loewen@Advisicon.com