

Microsoft Visio 2007: Creating a Process Map

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Introduction

Microsoft Visio 2007 helps users create professional-looking diagrams for understanding, documenting, and analyzing information, data, systems, and processes. The new features and enhancements in Visio 2007 make creating diagrams even easier and faster. This handout includes step-by-step instructions on how to work with shapes and text, connect and group shapes, and print the final diagram. It also included a brief introduction to systems thinking and process mapping, including how to select a process and the procedure of process mapping.

Downloading the Data Files

This handout includes sample data files that can be used for hands-on practice. The data files are stored in a self-extracting archive. The archive must be downloaded and executed in order to extract the data files.

The data files used with this handout are available for download at

<http://www.calstatela.edu/its/training/datafiles/visio2007.exe>.

Instructions on how to download and extract the data files are available at

<http://www.calstatela.edu/its/docs/download.php>.

Introduction to Systems Thinking and Process Mapping

Process mapping is a crucial tool for systems thinking. The participants in a process, the information gathered and action taken, as well as how that information flows throughout the system, can be identified in process mapping.

PROCESS MAPPING

Process mapping is a workflow diagram used to bring forth a clearer understanding of a process or a series of parallel processes (see Figure 1). A process map is also called a cross-functional flowchart or deployment chart. It visually depicts the sequence of events to build a product or produce an outcome. It is a visual representation of a process that illustrates:

- What activities are completed by whom and in what sequence.
- Hand-offs between departments or individuals.
- Internal and external operational boundaries (swim lanes).
- Clear starting and stopping points.

Procedure of Process Mapping

1. Select the process and define the process boundaries (define start and stop points).
 - a. Write down three issues you have been confronted with recently.
 - b. Select the most important issue.
 - c. Why is this so important?
 - d. What is the origin of this issue?
 - e. What will it take to minimize or eliminate this issue?
 - f. Draw a simple (high level) flowchart of the process involved.
2. Create the “as is” process map.
 - a. List all participants down the left side of the process map.
 - b. Visually observe each step taken or repeatedly ask “what happens next?”
 - c. Record a brief description in the appropriate row moving left to right with time.
 - d. Connect the boxes in the order of flow.

3. Create the “could be” or “should be” process map.
 - a. Analyze the current process for “non-value added” step elimination.
 - b. Document the changes by creating a second process map.
 - c. Seek approval from all groups.
4. Implement the changes and train those involved in the process.
5. Validate improvements by collecting performance data.
6. If necessary, modify the process further until ultimate efficiency is reached.

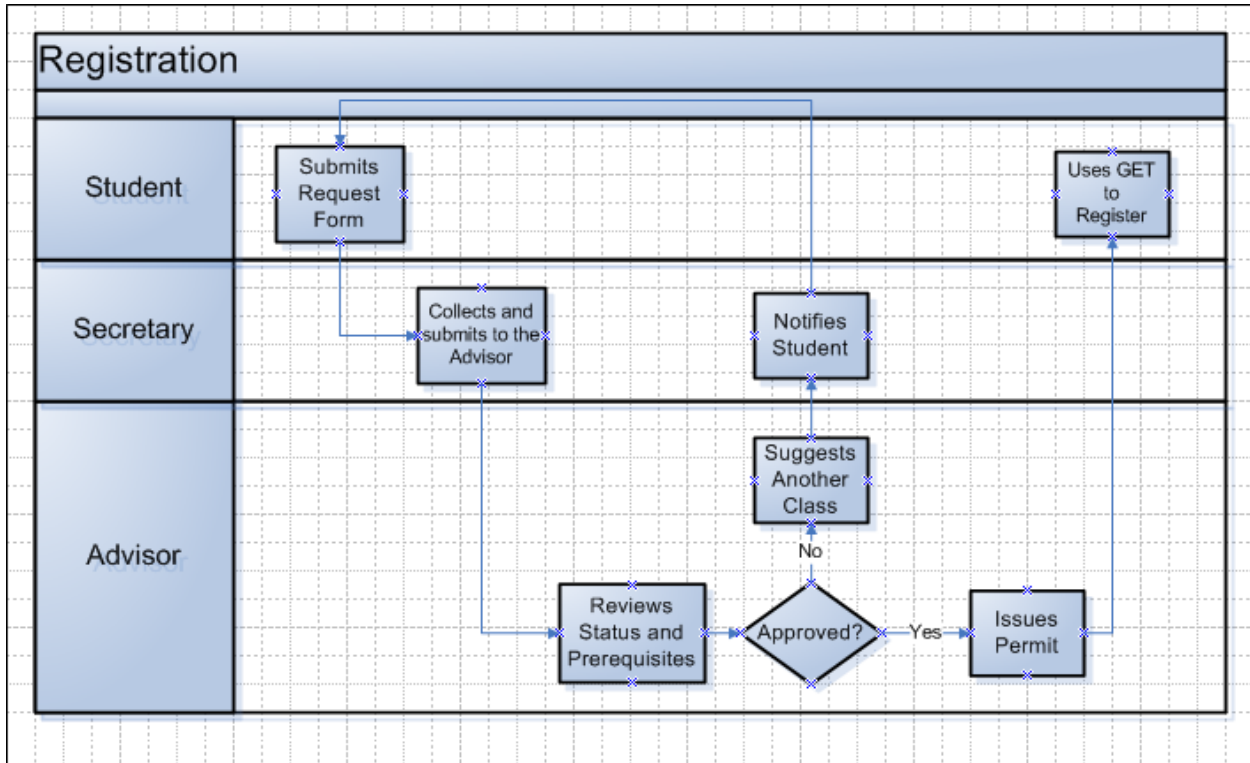


Figure 1 – An Example of a Process Map

Process Mapping Using Microsoft Visio

While Microsoft Word and PowerPoint provide basic diagramming capabilities, Visio is a dedicated drawing program that can help users easily create a broad range of drawings.

STARTING VISIO

To start Visio 2007:

1. Click the **Start** button, point to **All Programs**, point to **Microsoft Office**, and click  **Microsoft Office Visio 2007**.

USING THE INTERFACE

When Visio starts, the application window displays the **Template Categories** pane on the left and the **Getting Started with Microsoft Office Visio** pane on the right (see Figure 2).

By having templates organized into categories of related diagram types, Visio allows users to easily select the appropriate template (see Table 1 for a list of available template categories in Visio). The number of templates available in each template category varies. Once a category is selected, the available templates for that category are displayed. After selecting the desired template, Visio creates a new drawing and displays the **Shapes** pane. The **Shapes** pane contains

the stencils associated with the selected template (see Figure 3). Just as templates are organized by categories, related shapes are organized by stencils. For example, when users select the **Home Plan** template from the **Maps and Floor Plans** template category, all of the basic house structure shapes included with the template are organized in the **Walls, Shell and Structure** stencil.

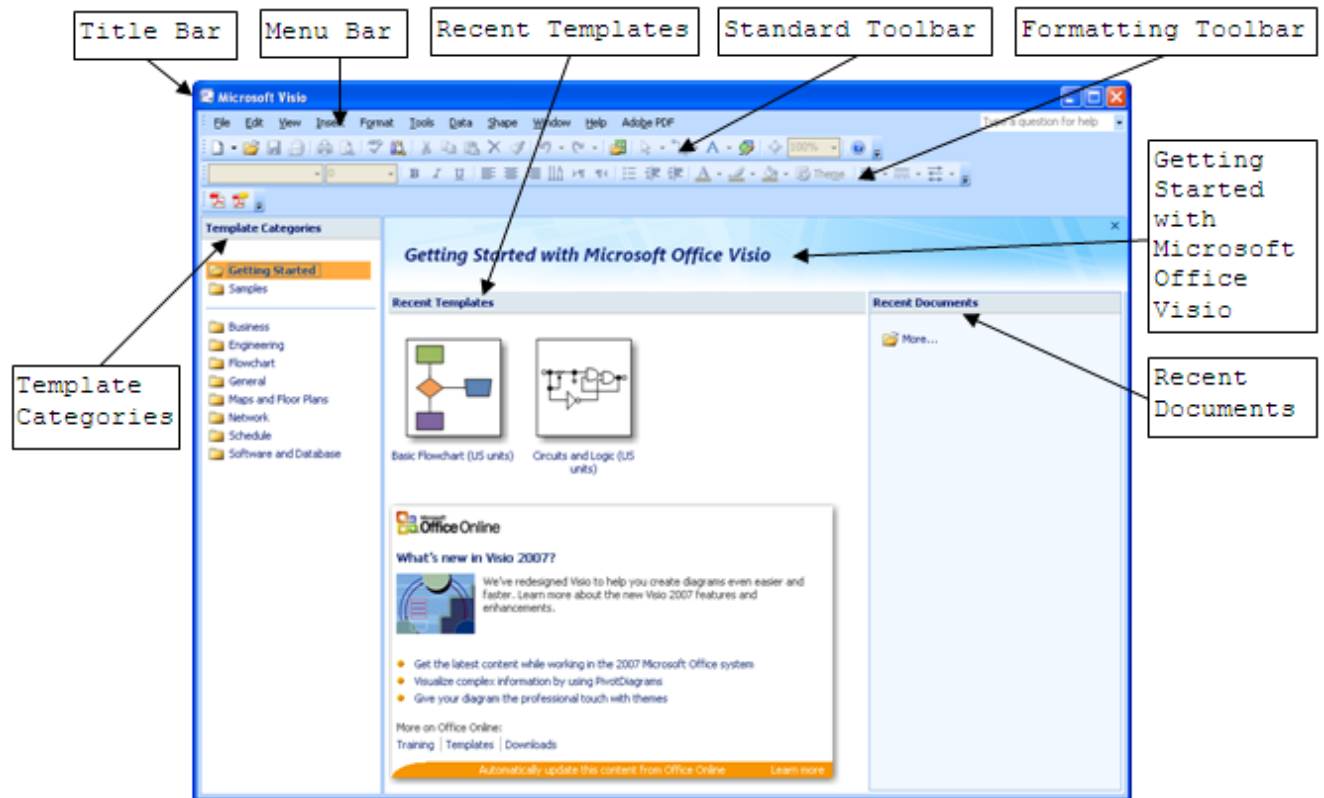


Figure 2 – Visio Interface

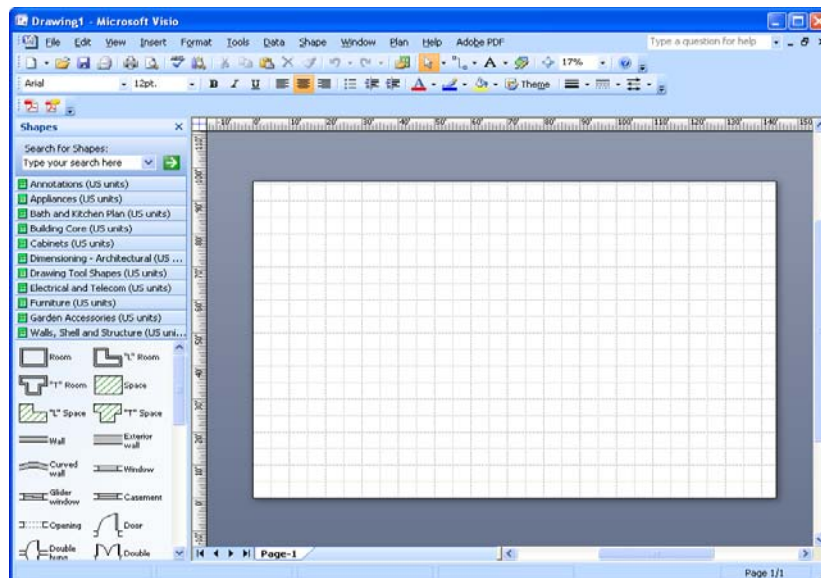


Figure 3 – Drawing Window with the Shapes Pane Displayed

Table 1 – Available Template Categories in Visio

Category	Purpose
Business	To show business processes using brainstorming diagrams, organization charts, cause and effect diagrams, data flow diagrams, work flow diagrams, etc.
Engineering	To create basic electrical diagrams, circuits and logic diagrams, industrial control systems diagrams, fluid power diagrams, part and assembly drawings, etc.
Flowchart	To create basic flowcharts, cross functional flowcharts, work flow diagrams, etc.
General	To create basic diagrams, flowcharts, and block diagrams.
Maps and Floor Plans	To create two-dimensional or three-dimensional directional maps, floor plans, home plans, office layouts, plumbing and piping plans, etc.
Network	To create network designs using network and computer equipment shapes, Web site maps, etc.
Schedule	To track project details with calendars, timelines, Gantt charts, and PERT charts.
Software and Database	To create database model diagrams, UML model diagrams, Windows XP user interface diagrams, etc.


Using Page Setup

The *Page Setup* dialog box is used to customize printed drawings (see Figure 4). It is helpful to customize the printer paper size and the drawing page before starting the drawing in order to better arrange the space. The *Print Setup* and *Page Size* tabs are explained in detail in the following sections.

USING THE PRINT SETUP TAB

The *Print Setup* tab provides several settings that users can adjust, such as the printer paper size and orientation. Gridlines can be chosen to print when measurements are important in the drawing. The *Print zoom* area enables users to reduce or enlarge the printed size of the drawing.

To change the paper orientation and the printed size of a drawing:

1. Open the “*print.vsd*” file.
2. Click the **F**ile menu and select **P**age **S**etup.... The *Page Setup* dialog box opens (see Figure 4).
3. Click the *Print Setup* tab, if necessary.
4. Under *Printer paper*, select the **Landscape** option button.
5. Under *Print zoom*, click the **Adjust to** drop-down arrow  and select **50%**.
6. Under *Print*, select the **Gridlines** check box.
7. Click the **OK** button to confirm the changes.

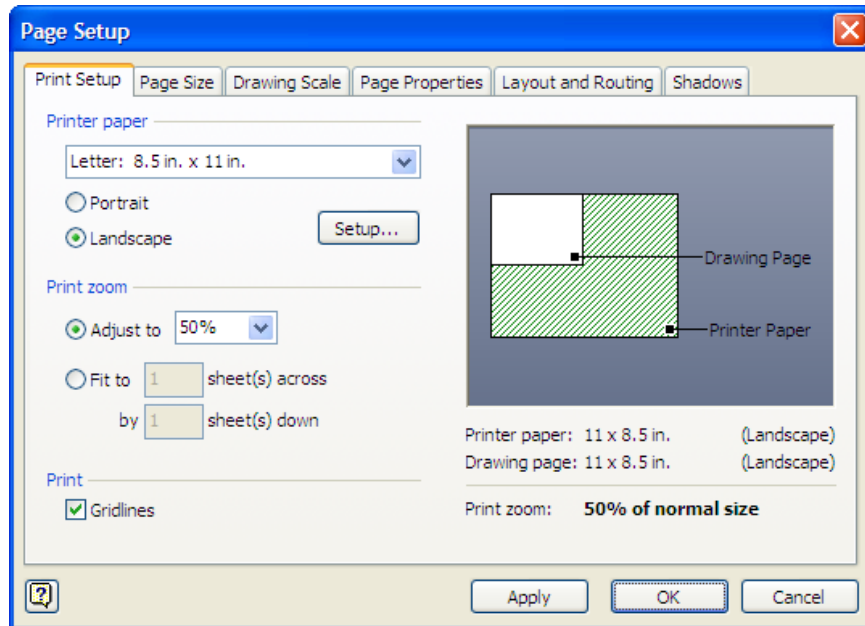


Figure 4 – Page Setup Dialog Box (Print Setup Tab)

USING THE PAGE SIZE TAB

The *Page Size* tab allows users to adjust the page size and set the page orientation to be either portrait or landscape for the drawing.

To change the page size and orientation:

1. Click the **File** menu and select **Page Setup....** The *Page Setup* dialog box opens.
2. Click the *Page Size* tab (see Figure 5).
3. Under *Page size*, select the ***Pre-defined size:*** option button.
4. Under *Page orientation*, select the ***Landscape*** option button.
5. Click the **OK** button to confirm the changes.

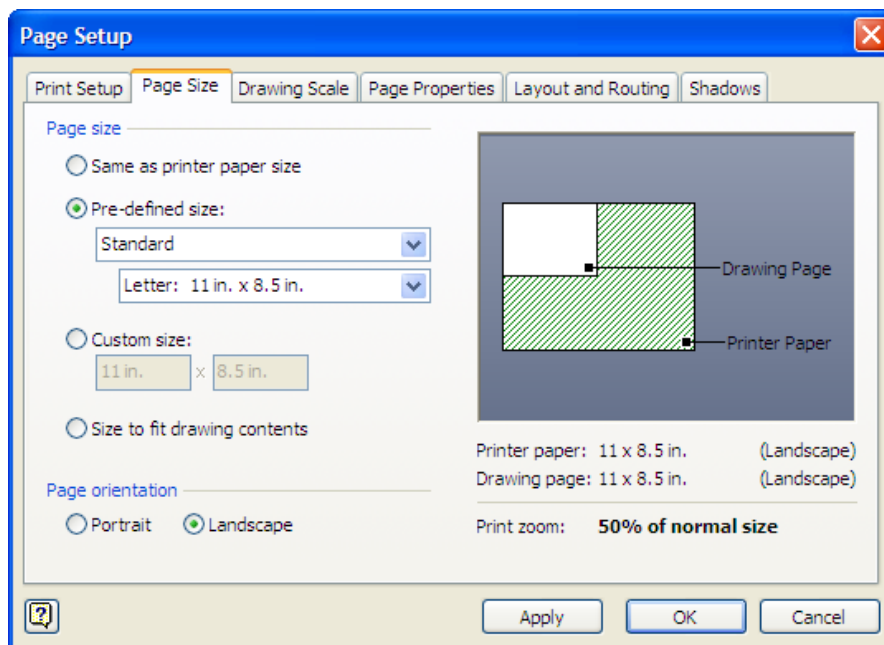


Figure 5 – Page Setup Dialog Box (Page Size Tab)

Using Basic Drawing Skills

Visio allows users to create a drawing in several ways, including using a wizard which provides guidance for creating a drawing. The easiest way to create a drawing is to click on a template category and select a template.

ADDING SHAPES TO A DRAWING

To add a shape to a drawing, simply drag the desired shape onto the drawing page.

To add a shape to a drawing:

1. Click the **F**ile menu, point to **N**ew, and select **G**etting Started.... The **G**etting Started window displays.
2. From the **T**emplate Categories pane, select the **G**eneral category. All the templates in that category display in the right pane (see Figure 6).
3. Select the **B**asic Diagram template.
4. Next to **M**easurement Units:, select the **U**S units option button.

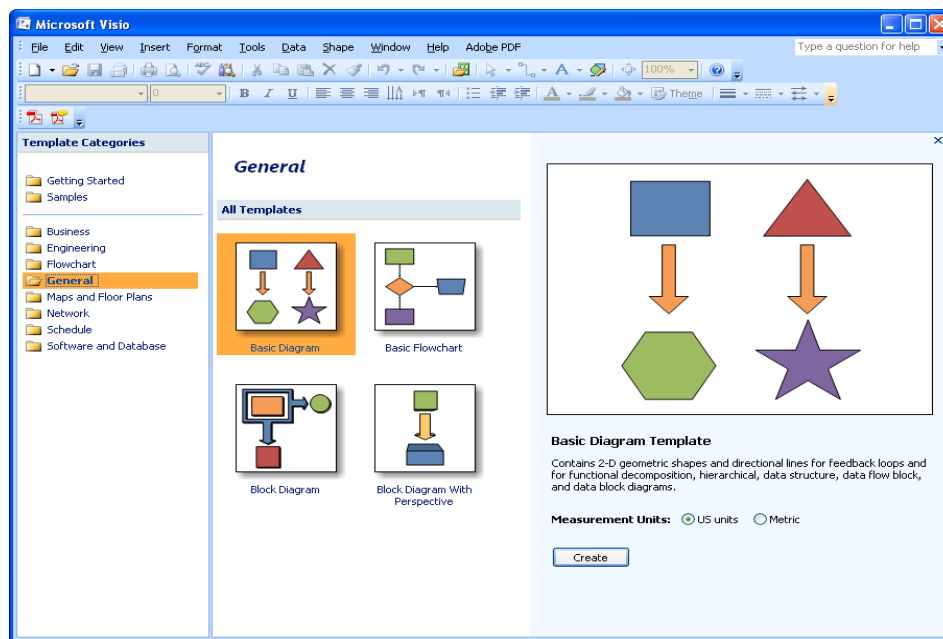


Figure 6 – Creating a Drawing from the Basic Diagram Template

5. Click the **C**reate button. The drawing page displays.
6. In the **S**hapes pane, select the **B**asic Shapes (**U**S units) stencil, if necessary.
7. Drag the **S**quare shape 4 onto the drawing page (see Figure 7).

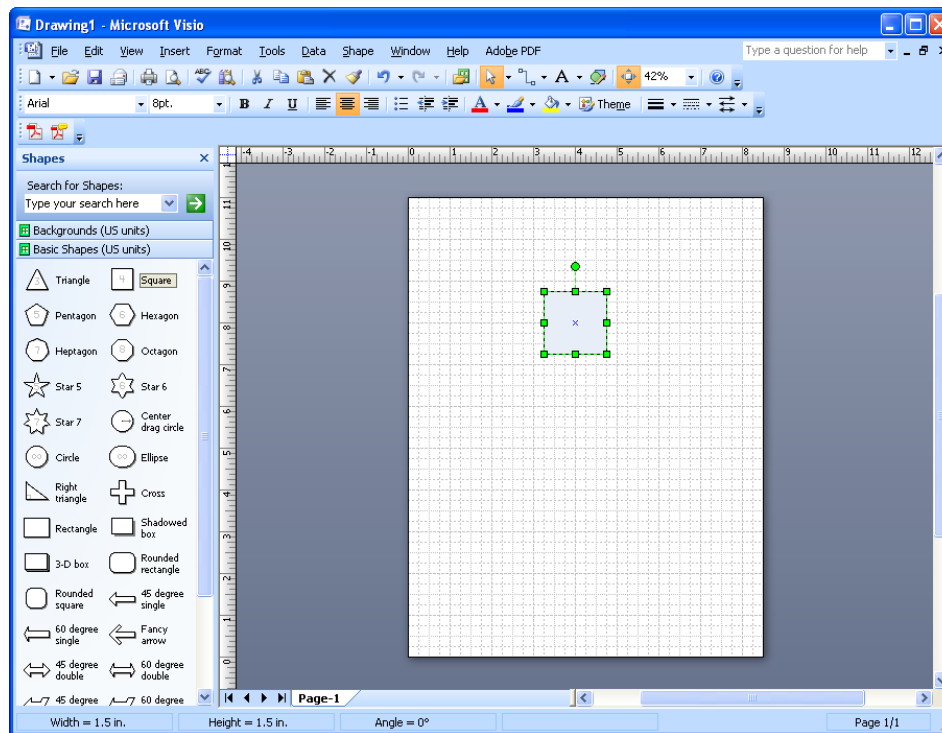



Figure 7 – Adding a Square Shape to the Drawing Page

SAVING A NEW DRAWING

When a drawing is saved for the first time, Visio opens the *Save As* dialog box, into which users enter the desired file name and location. A file name can consist of multiple words and should be descriptive enough to recognize its contents. Visio automatically assigns the .vsd extension.

To save a new drawing:

1. Click the **Save** button  on the **Standard** toolbar. The *Save As* dialog box opens.
2. In the **Save in:** drop-down list, specify a location to save the file (e.g., personal flash drive).
3. In the **File name:** text box, rename the file or leave the default file name.
4. Click the **Save** button.

NOTE: The following characters cannot be used in file names: forward slash (/), backslash (\), greater than sign (>), less than sign (<), asterisk (*), quotation marks (“ ”), question mark (?), pipe (|), colon (:), or semicolon (;).

ADDING AND DELETING PAGES

When a new drawing is created, Visio provides only one page. Users can add or remove as many pages as desired in the drawings. The added pages, which use the attributes of the page currently displayed, are always added to the end of the drawing.

To add a page to the drawing:

1. Right-click the *Page-1* tab at the bottom of the drawing page.
2. Click **Insert Page...** The *Page Setup* dialog box opens (see Figure 8).
3. Next to **Type:**, select the **Foreground** option button.
4. In the **Name:** text box, type a new name or leave the default name.
5. Click the **OK** button.

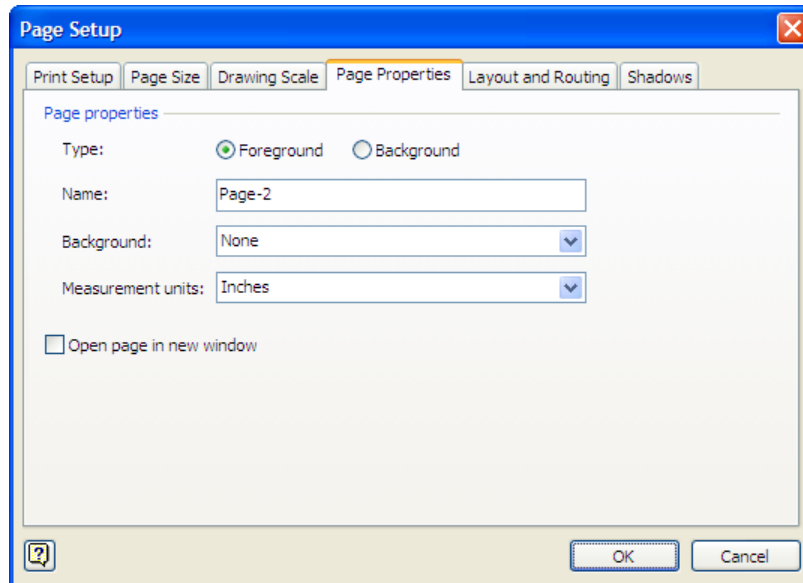


Figure 8 – Page Setup Dialog Box (Page Properties Tab)

To delete a page from the drawing:

1. Right-click the tab of the page you want to delete.
2. Click **Del**ete Page.

Working with Shapes

Shapes, the most important elements in Visio, are stored in stencils. To create drawings, users can either use the shapes that Visio provides or create their own personal shapes.

SELECTING SHAPES

To select a shape in a Visio drawing, users can simply click on the shape. To select a filled shape, users can click inside the shape. To select an unfilled shape, users must click the border of the shape. Once selected, a green selection frame with handles appears to show that the shape is selected.

More than one shape can be selected at a time by pressing the **[Shift]** key. To select all of the shapes, press the **[Ctrl+A]** key combination. As the shapes are selected, all shapes become enclosed in a green rectangle called a *selection box*. Green handles appear at the corners and sides of the selection box. The selected shapes are outlined in magenta, and the first selected shape of the group has a bolder outline (see Figure 9).

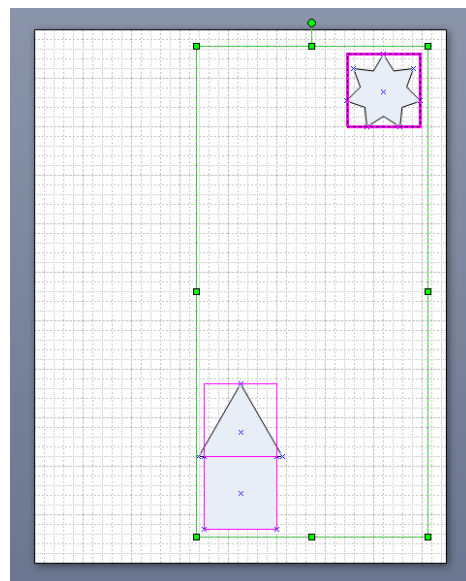




Figure 9 – Selecting Multiple Shapes

To select multiple shapes:



1. Open the “*shape.vsd*” file.
2. Click the **Square** shape  at the bottom of the drawing page.
3. Hold down the [Shift] key and click the **Star** shape  at the top of the drawing.

NOTE: To deselect a shape, hold down the [Shift] key and click the shape that needs to be removed from the selection. The selection box reduces in size to exclude the removed shape. To deselect all of the shapes, click in a blank area of the drawing page or press the [Esc] key.

MOVING SHAPES

Moving a shape in Visio is done by simply dragging the shape to the desired position. When the shape is dragged, the horizontal and vertical rulers display the shape’s top, middle, and bottom points on the ruler with faint, dotted lines. Holding down the [Shift] key while dragging a shape limits dragging to horizontal or vertical movements.

To move a shape:




1. Drag the **Triangle** shape  to a position approximately one inch above the **Square** shape .
2. Hold [Shift] and drag the **Triangle** shape horizontally one inch to the left.
3. Press the down arrow [↓] and the right arrow [→] keys on the keyboard as necessary to position the **Triangle** shape on top of the **Square** shape.

NOTE: Users can reposition the shape to the desired location in small increments by pressing the up [↑], down [↓], left [←], or right [→] arrow keys on the keyboard.

COPYING AND PASTING SHAPES

To duplicate shapes, simply use the **Copy** and **Paste** features. The **Copy** feature is similar to the **Cut** feature, except that the **Copy** feature does not remove the shape from the original location.

To copy and paste a shape:


1. Click the **Star** shape  at the top right corner of the drawing.
2. Click the **Copy** button  on the **Standard** toolbar.
3. Click the **Paste** button  on the **Standard** toolbar to place a copy of the shape on the drawing page.

SIZING SHAPES

After clicking a shape, users can drag a side handle to adjust the shape’s width, a top or bottom handle to adjust the shape’s height, and a corner handle to adjust the height and width at the same time. Dragging a corner handle maintains a shape’s height-to-width proportions.

NOTE: When the shape is resized, the status bar at the bottom of the screen displays the shape’s height and width as users move the mouse. This feature is useful if the shape needs to be a specific size.


To resize a shape:

1. Click the **Star** shape  at the top right corner of the drawing.
2. Point to the bottom left corner sizing handle of the **Star** shape.
3. Drag the bottom left corner sizing handle until the **Star** shape is approximately 1/2 inch high by 1/2 inch wide.
4. Click in a blank area of the drawing page to deselect all shapes.


DELETING SHAPES

To delete a shape, it must first be selected. Shapes can be deleted one at a time or several at once. If a shape is selected, the entire shape and any text contained within the shape will be deleted. However, if only the text within a shape is selected, then only the selected text is deleted.

To delete a shape:


1. Click the **Star** shape  at the top right corner of the drawing.
2. Press the **[Delete]** key.

ROTATING SHAPES

Most of the shapes in Visio can be rotated to a desired angle. After selecting a shape, a round, green rotation handle  appears outside the perimeter of the selection frame, along with selection handles. When pointing to the rotation handle, the mouse pointer changes into a single, curved arrow. Dragging the rotation handle in a circular motion will rotate a shape.

NOTE: When the shape is rotated, the status bar at the bottom of the screen displays the angle of rotation in degrees. This visual guide is useful if users want to rotate several shapes to the same angle.

To rotate a shape:

1. Click the **Triangle** shape .
2. Drag the rotation handle to the left until a 45 degree angle is reached.
3. Click in a blank area of the drawing page to deselect the shape.

Working with Text

Visio allows users to enhance drawings by adding text. All text in a Visio drawing is contained in a text block (see Figure 10). When moving a shape with text, the text block automatically moves with it.

ADDING TEXT TO SHAPES

Visio automatically expands the width of the text block as text is added. Pressing the **[Enter]** key begins a new line of text. Visio automatically enlarges the length of the text block when more text is entered than the selected shape can hold.

To add text to a shape:

1. Open the “*party1.vsd*” file.
2. Double-click the **Road** shape next to the building at the bottom right of the drawing page.
3. Type **[Main]**, press the **[Enter]** key, and type **[Avenue]** (see Figure 10).
4. Click in a blank area of the drawing page to deselect the text block.

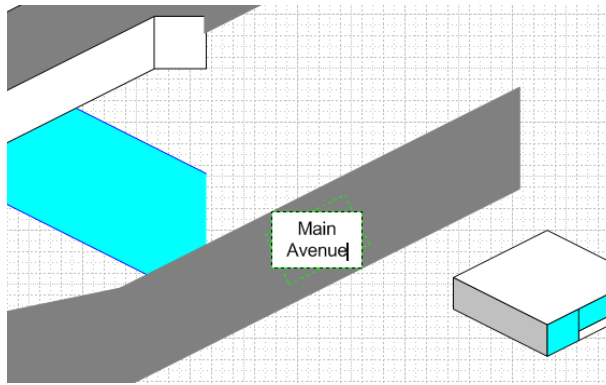


Figure 10 – Adding Text to Shapes

ADDING FREESTANDING TEXT




Visio allows users to create *freestanding text* which is text that is not associated with any shape. Freestanding text can be used to enter titles, lists, callouts, footers, etc. Even though freestanding text is not attached to a shape, it is enclosed in a text block (see Figure 11).

When using the **Text Block Tool** to create a text block, the text automatically word-wraps to preserve the width of the text block. However, the height of the text block expands as needed. To create a text block for freestanding text, either drag to create a text block which fits a specific area, or click in the drawing and allow Visio to insert a text block with a default width.



Figure 11 – Freestanding Text Block in a Drawing

To add freestanding text:

1. Click the **Text Tool** button  on the **Standard** toolbar.
2. Click and drag the mouse in the top right corner of the drawing to draw a text block approximately 4 inches wide by 1 inch high.
3. Type **[Directions to Cathy's Party]**, press the **[Enter]** key, and type **[Starts at 4:00 PM]**.
4. Click in a blank area of the drawing page to deselect the freestanding text block.
5. Click the **Pointer Tool** button  on the **Standard** toolbar to deactivate the **Text Tool** button .
6. Double-click the freestanding text. Notice that the whole text is automatically selected.
7. Click in a blank area of the drawing page to deselect the freestanding text block.

Connecting Shapes

Connectors in Visio are used to connect shapes to each other (see Figure 12). Connectors can be lines, arcs, arrows, hubs, cables, etc. These are used to reflect items such as a path in a process, a relationship between shapes, or a hierarchy. Connectors can be created using the **Connector Tool** or **AutoConnect**.

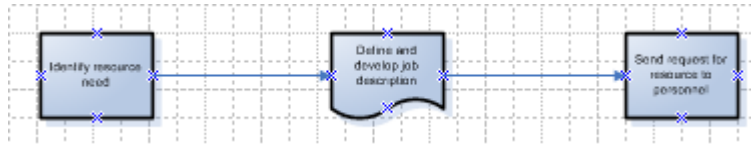








Figure 12 – Connected Shapes

USING THE CONNECTOR TOOL

One of the most flexible ways to add and glue a connector is to draw it by using the **Connector Tool**. This tool allows users to create a point-to-point or a shape-to-shape connection between shapes. With a *point-to-point* connection, the connector stays glued to the same connection points when one of the shapes is moved. With a *shape-to-shape* connection, the connector stays glued to each shape by moving to the closest available connection points when either one of the shapes is moved.

To create a point-to-point connection:

1. Open the “*hire.vsd*” file.
2. Click the **Connector Tool** button  on the **Standard** toolbar.
3. In the first row of shapes, drag from the right connection point  on the first **Process** shape  to the left connection point on the **Document** shape . The connector endpoints turn red  when the shapes are connected (see Figure 13).
4. Click the **Pointer Tool** button  on the **Standard** toolbar to return to normal editing.
5. Drag the **Process** shape to a new location. Notice that the connector stays glued to the same connection points.
6. Click in a blank area of the drawing page to deselect the shape.

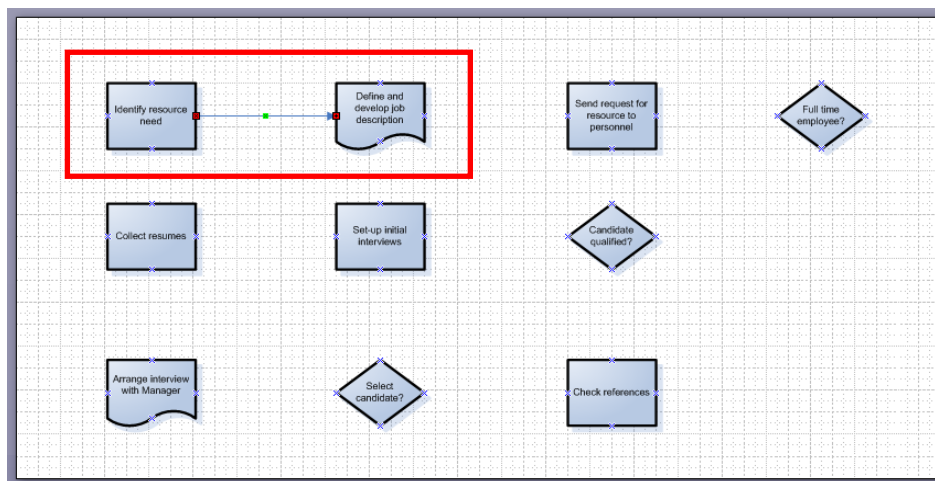






Figure 13 – Point-to-point Connection Using the Connector Tool

To create shape-to-shape connection:

1. Click the **Connector Tool** button  on the **Standard** toolbar.
2. Point to the center of the **Decision** shape  in the first row until a red box appears around the shape.
3. Hold down the mouse button and drag to the center of the **Process** shape  in the third row (see Figure 14). When a red box appears around the **Process** shape, release the mouse button.
4. Click the **Pointer Tool** button  on the **Standard** toolbar to return to normal editing.
5. Drag the **Decision** shape to a new location. Notice that the connector stays glued to each shape by moving to the closest available connection points.
6. Click in a blank area of the drawing page to deselect the shape.

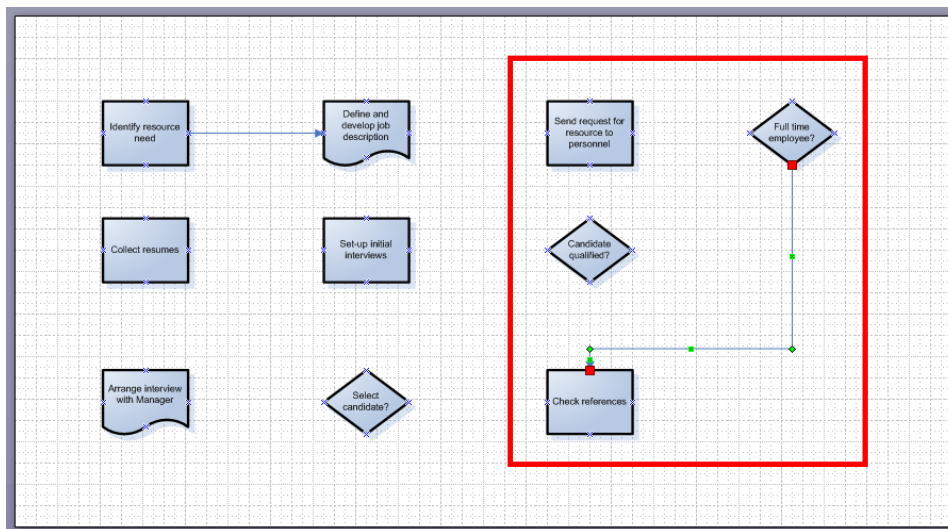





Figure 14 – Shape-to-shape Connection Using the Connector Tool


USING AUTOCONNECT

The quickest way to add and glue connectors to two shapes is to use **AutoConnect**. Users can use **AutoConnect** while dragging shapes from a stencil onto the page, or to connect shapes that are already on the page. **AutoConnect** can only be used to create a shape-to-shape connection between two shapes.

To connect shapes that are already on the page:

1. Point to the **Document** shape  in the third row.
2. Position the pointer over the blue connection arrow  that is closest to the **Decision** shape  to the right of it. The arrow turns dark blue and a red box appears around the **Decision** shape (see Figure 15).

NOTE: If a red box does not appear around the shape that you want to connect to, the shape may be too far away. Move the shape closer and try again, or use the **Connector Tool**.

3. Click the blue connection arrow . A connector is added and glued to both shapes.

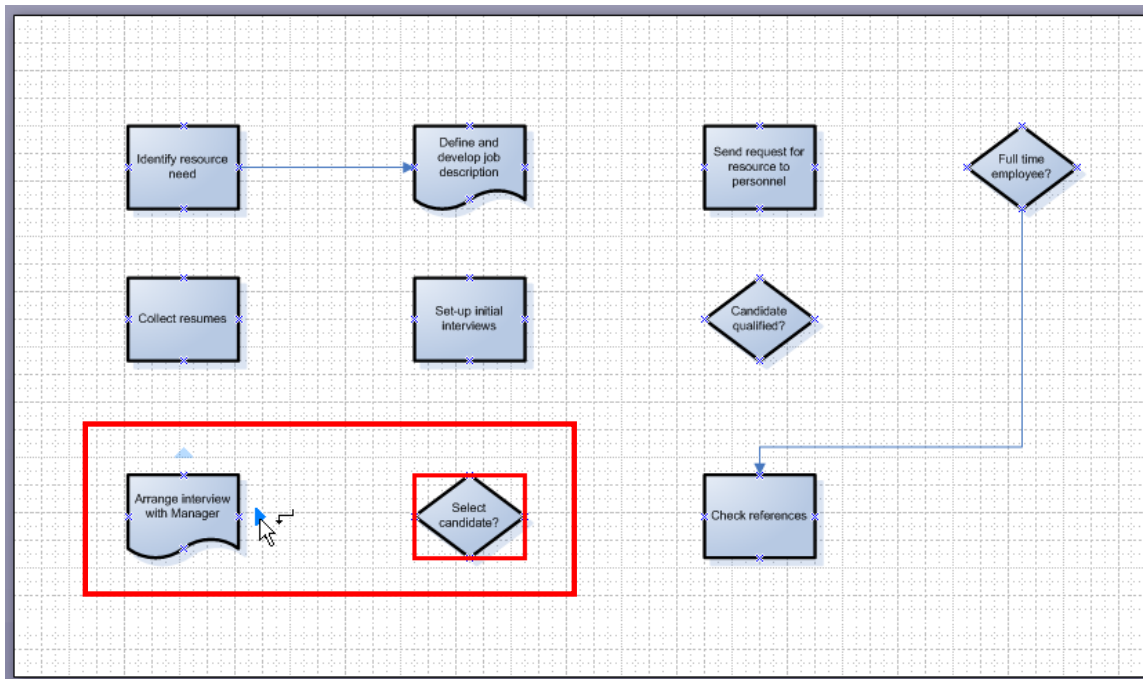




Figure 15 – Shape-to-shape Connection Using AutoConnect

To connect shapes by dragging them onto the page:

1. In the **Shapes** pane, select the **Basic Flowchart Shapes (US units)** stencil, if necessary.
2. Drag the **Process** shape  from the stencil onto the drawing page and position it over the bottom blue connection arrow of the **Document** shape  in the third row (see Figure 16). The arrow turns dark blue.
3. Release the mouse button. The shape is placed on the drawing page, and a connector is added and glued to both shapes.

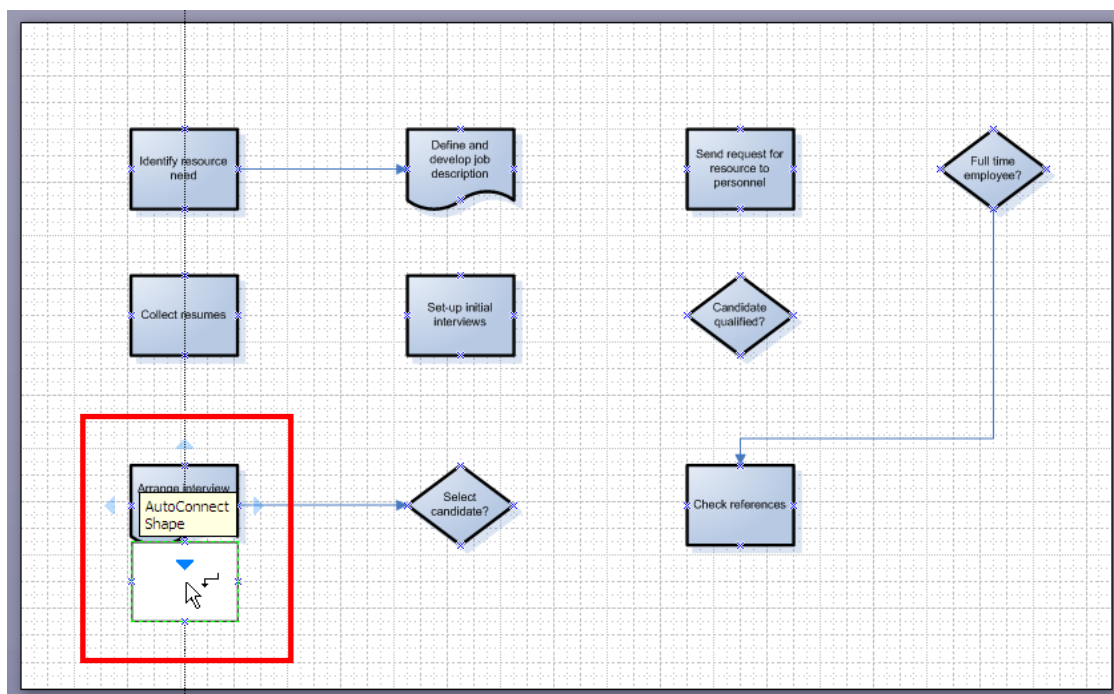


Figure 16 – Shape-to-shape Connection by Dragging Shapes

Grouping Shapes

Users can group together various shapes and treat them as one unit. This feature is useful when moving shapes to a different location. For example, when moving ten shapes to the top of the drawing page, it would be time-consuming to move them one-by-one and to maintain the previous alignment.

GROUPING AND UNGROUPING SHAPES

Visio allows users to group shapes, providing a way to move around shapes while preserving the spacing and alignment between each shape. After grouping shapes, users can flip, rotate, and size a group of shapes as a single unit. If desired, users can then ungroup the shapes and return them to their original independent state.

To group and ungroup shapes:

1. Open the “*group.vsd*” file.
2. Click the **View** menu, point to **Toolbars**, and then click **Action**. The **Action** toolbar displays (see Figure 17).



Figure 17 – Action Toolbar

3. Hold down the [Shift] key and click the **Room** shape at the top left of the drawing page, the **Mutli-chair round table**, each **Desk chair**, and the three **Small plant** shapes (see Figure 18).

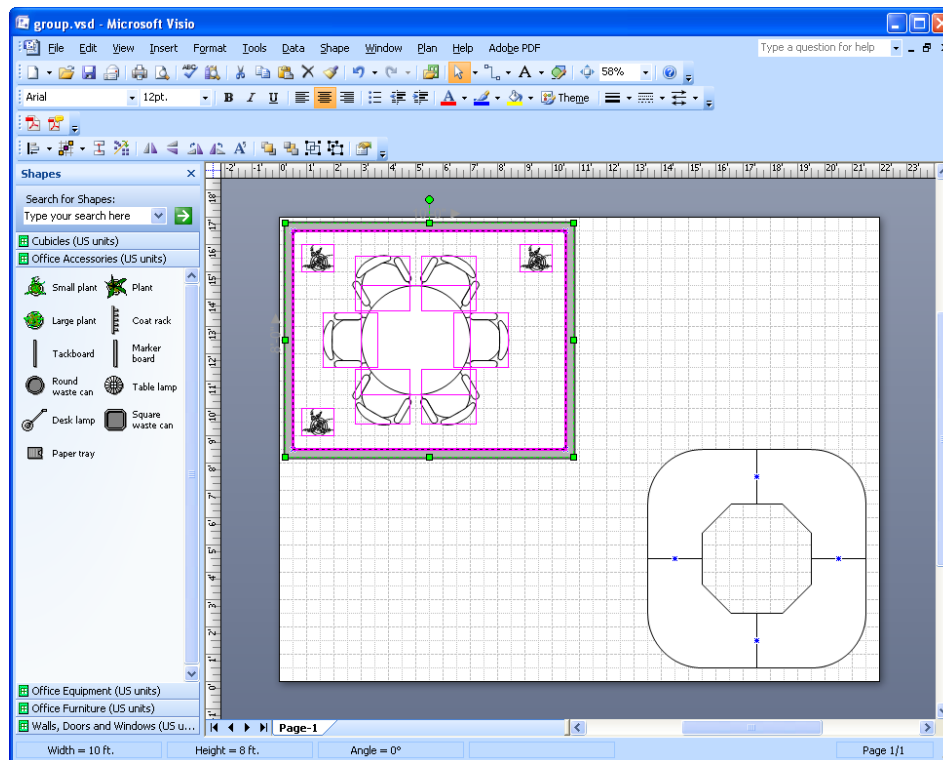




Figure 18 – Grouping Shapes


4. On the **Action** toolbar, click the **Group** button .
5. Drag the grouped shape to a new location. Notice that all the shapes in the group move together.
6. Click the grouped shape consisting of four **Corner surface** shapes at the bottom right of the drawing page.
7. On the **Action** toolbar, click the **Ungroup** button . Each **Corner surface** shape can now be moved individually.
8. Click in a blank area of the drawing page to deselect the shapes.

NOTE: Users can also use the [Ctrl+Shift+G] key combination to group shapes and the [Ctrl+Shift+U] key combination to ungroup shapes.

ADDING A SHAPE TO A GROUP

After grouping shapes, users may want to add more shapes to the group. Visio allows users to add additional shapes to an existing group.


To add a shape to the group:

1. Drag the **Plant** shape  from the **Office Accessories** stencil to the center of the grouped shape at the top left of the drawing page.
2. Click the grouped shape at the top left of the drawing page, hold down the [Shift] key, and click the **Plant** shape.
3. Click the **Shape** menu, point to **Grouping**, and then click **Add to Group**. The **Plant** shape is now part of the group.
4. Drag the grouped shape to a new location. Notice that the **Plant** shape moves with the group.
5. Click in a blank area of the drawing page to deselect the shape.

REMOVING A SHAPE FROM A GROUP

Users can remove a shape from a group if desired. When removing a shape from a group, the shape still remains in the drawing, but is no longer part of the group. The shape can then be moved by itself without the other shapes of the group being affected.

To remove a shape from the group:

1. Click the grouped shape at the top left of the drawing page.
2. Click the **Plant** shape  in the middle of the grouped shape.
3. Click the **Shape** menu, point to **Grouping**, and then click **Remove from Group**. The **Plant** shape is no longer part of the group.
4. Drag the **Plant** shape to a new location. Notice that the **Plant** shape moves independently from the group.
5. Click in a blank area of the drawing page to deselect the shape.

Printing




Visio allows users to print the entire drawing or just a part of the drawing. Before printing, it is helpful to preview a drawing to verify what will be printed.

PREVIEW A DRAWING

Before printing, users can use the **Print Preview** function to see how each drawing will appear on the printed page. **Print Preview** displays the page to fit the screen (see Figure 19). When the mouse pointer is positioned over the page, it changes into a magnifying glass. When users click the page with the magnifying glass, the magnification increases; when clicked again, the magnification decreases and the page returns to full view.

If a drawing contains more than one page, users can preview the additional pages by clicking the **Next Tile** button or by clicking the desired page tab at the bottom of the window.

To preview a drawing:

1. Open the “*party2.vsd*” file.
2. Click the *Page-1* tab, if necessary.
3. Click the **Print Preview** button  on the **Standard** toolbar.
4. Click the **Next Tile** button  to preview the next page.
5. Click the **Previous Tile** button  to preview the previous page.
6. Click the **Close** button to close **Print Preview**.

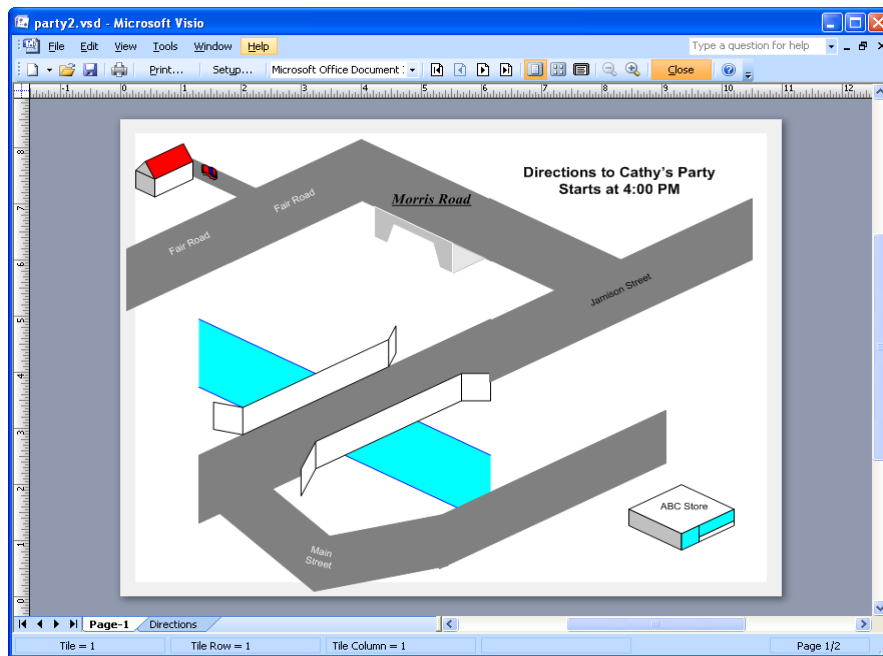




Figure 19 – Previewing a Drawing in Print Preview

PRINTING PART OF A DRAWING

Users can print a portion of a drawing. For example, if a drawing contains many shapes, users can choose to print only the shapes they want to review.

To print a part of a drawing:

1. Click the **House** shape  at the top left of the drawing page, hold down the **[Shift]** key, and click the **ABC Store** shape  at the bottom right of the drawing page.
2. Click the **File** menu and select **Print....** The *Print* dialog box opens.
3. Under *Page range*, click the **Selection** option button.
4. Click the **OK** button.
5. Click in a blank area of the drawing page to deselect the shapes.

Closing a Drawing

Once users finish working on a drawing, they can close it to remove it from the application window. When closing a drawing, Visio prompts users to save the file if there are any recent, unsaved changes made to it.

To close a drawing:

1. Click the **File** menu and select **Close**.

Exiting Visio

When users finish using Visio, they should properly exit the application. This allows Visio to perform necessary housekeeping before it closes. If the current drawing has been modified but not saved, a Visio dialog box or the Office Assistant prompts users to save the changes before exiting.

To exit Visio:

1. Click the **File** menu and select **Exit**.