Microsoft Visio 2013: Creating Process Maps

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Introduction

Microsoft Visio 2013 is used to create professional and versatile diagrams that simplify complex information. Visio provides standardized tools that enable you to easily assemble drawings or diagrams using basic building blocks or shapes. This handout includes a brief introduction to systems thinking and process mapping, including how to use Visio to create a process map. It also provides an overview of the Visio 2013 user interface and covers working with swimlanes, shapes, text, and pages; formatting and printing diagrams; and getting help.

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/visio2013.exe.
- Instructions on how to download and extract the data files are available at http://www.calstatela.edu/its/training/pdf/download.pdf.

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

A *process map* is a workflow diagram used to bring forth a clearer understanding of a process or a series of parallel processes. 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 (swimlanes).
- Clear starting and stopping points.

Procedure of process mapping:

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

- Analyze the current process for "non-value added" step elimination.
- Document the changes by creating a second process map.
- 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.

While Microsoft Word and PowerPoint provide basic diagramming capabilities, Visio is a dedicated drawing program that can help you easily create a broad range of drawings. Figure 1 is an example of a process map created using Visio 2013. It illustrates the process that a student has to go through in order to register for a class.

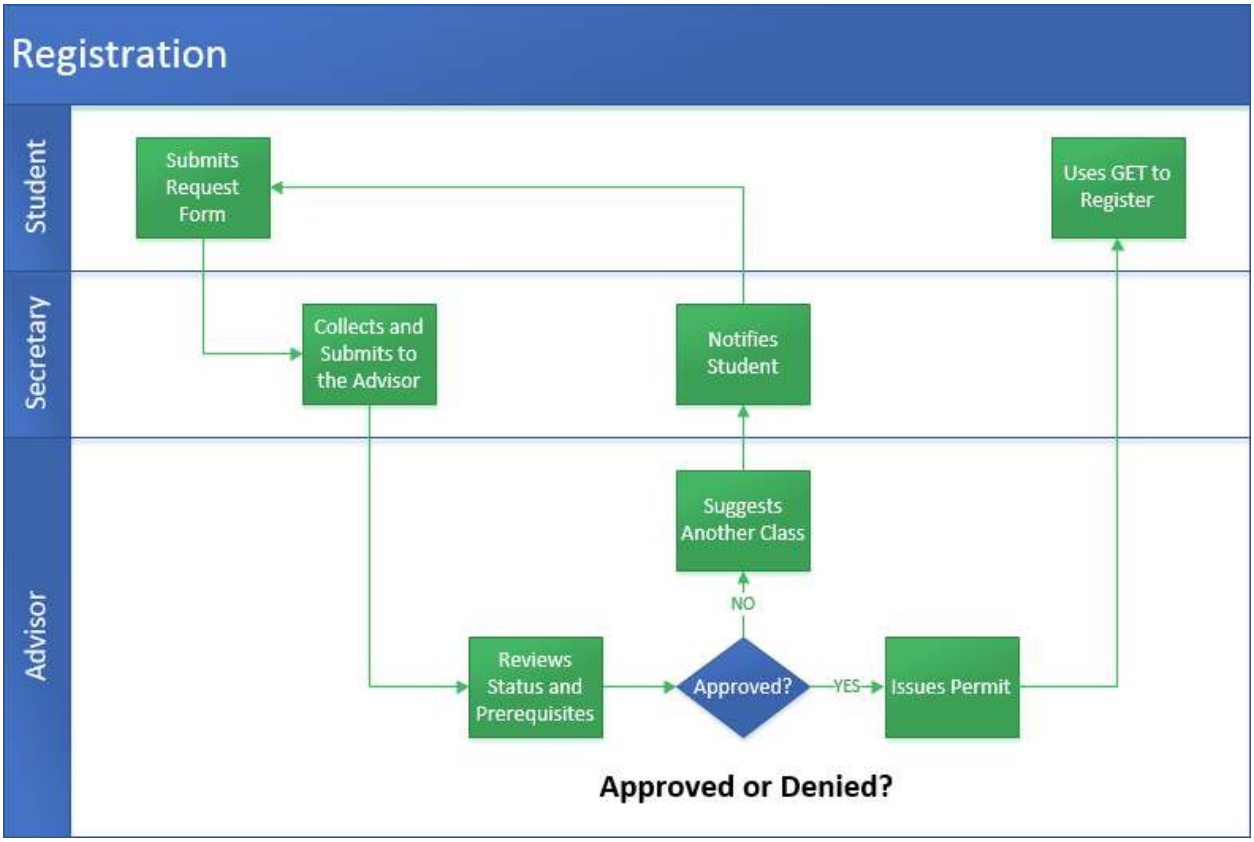

Figure 1 – Example of a Process Map

Starting Visio

You can start Visio 2013 from the Start menu (in Windows 7) or by double-clicking an existing Visio file. When you start the program without opening a specific file, the *Start* screen appears, prompting you to open an existing drawing or create a new drawing.

To start Visio 2013 from the Start menu:

1. Click the **Start** button, click **All Programs**, click **Microsoft Office 2013**, and then click **Visio 2013**. The **Start** screen appears (see Figure 2).
2. In the right pane, click the desired template (e.g., **Basic Diagram**), and then click the **Create** button. A new, blank drawing opens in the program window.

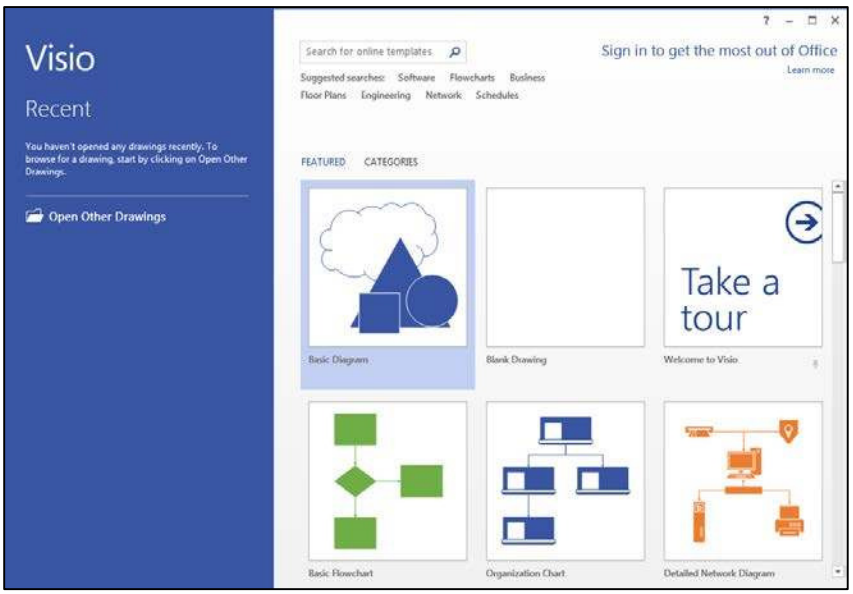

Figure 2 – Visio 2013 Start Screen

Overview of the User Interface

All the Microsoft Office 2013 programs share a common user interface so you can apply basic techniques that you learn in one program to other programs. The Visio 2013 program window is designed to help you quickly find the tools that you need to complete a task (see Figure 3 and Table 1).

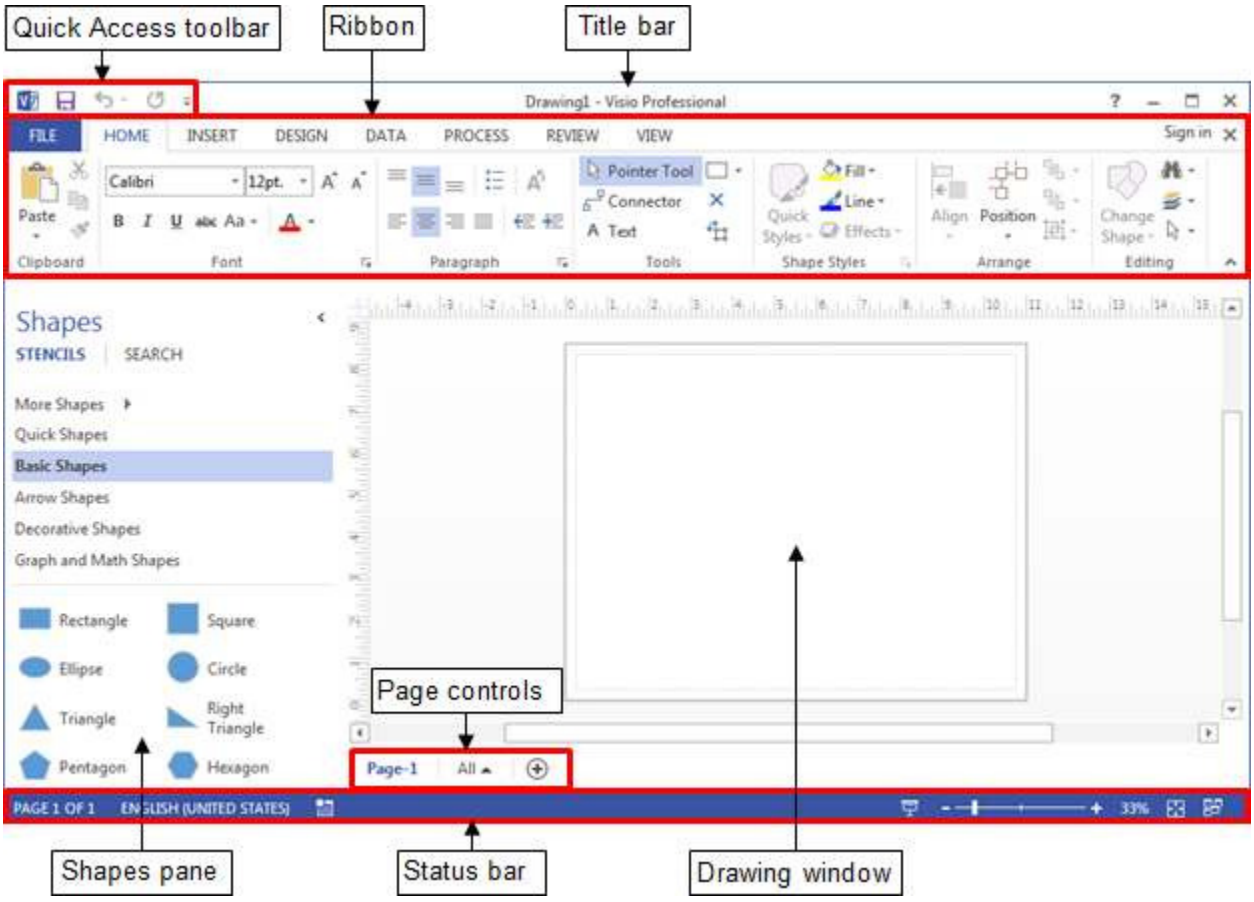

Figure 3 – Visio 2013 Program Window

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