

# Microsoft® Office Visio® Professional 2007 for IT

## How to Use Visio for Project Management

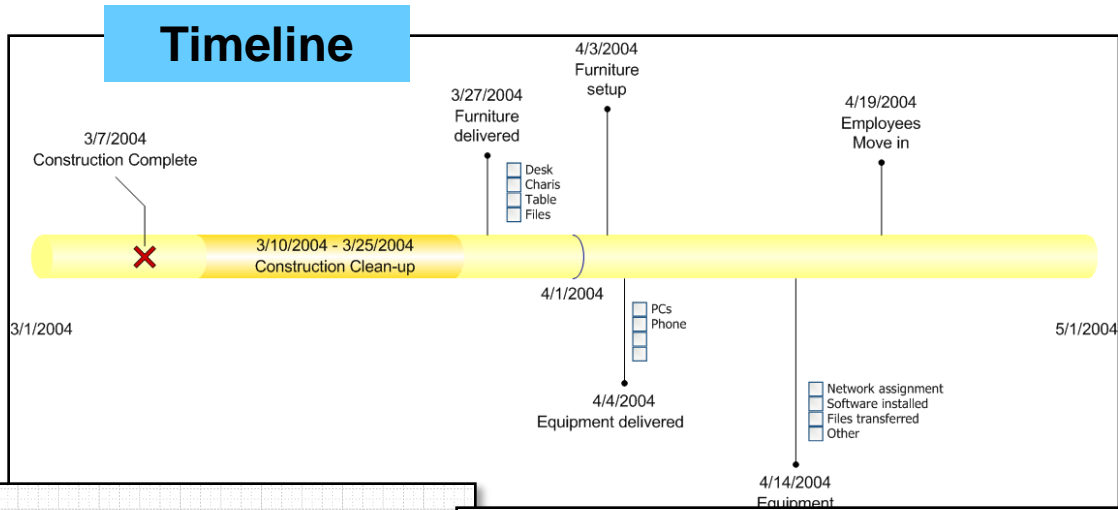
# Project Management Summary

- ◆ **Use Visio 2007 with Project 2007**
- ◆ **Diagram All Project Phases**
  - ◆ **Planning**
  - ◆ **Design**
  - ◆ **Engineering**
  - ◆ **Implementation**
- ◆ **Diagram Types**
  - ◆ **Gantt Chart**
  - ◆ **Project timeline**
  - ◆ **Project status**
  - ◆ **Processes**
  - ◆ **Work Breakdown**
  - ◆ **Responsibility Matrix**

# Visio 2007 and Project 2007

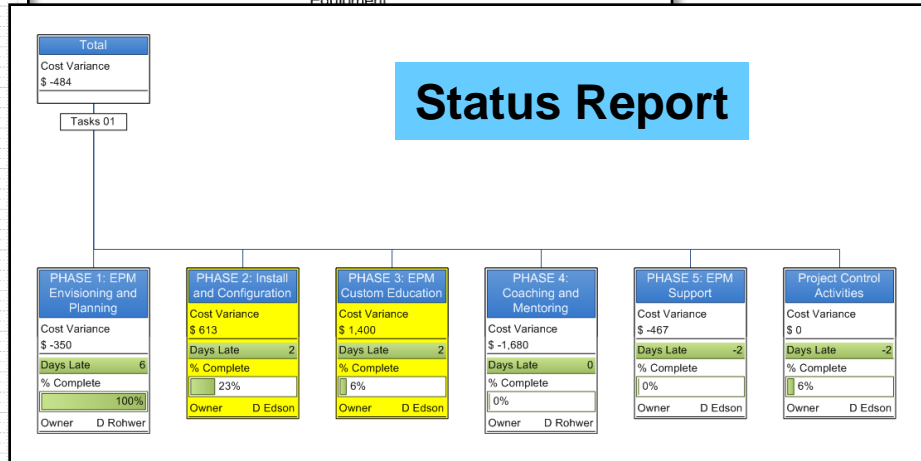
- ◆ **Create plan in Project**
- ◆ **Import plan into Visio diagram**
  - ◆ **Timeline**
  - ◆ **Gantt Chart**
  - ◆ **Include with other project diagrams**
- ◆ **Report project status as Visio PivotDiagram**
- ◆ **Perform 'what-if' modifications and export back into Project**

# Diagram Types



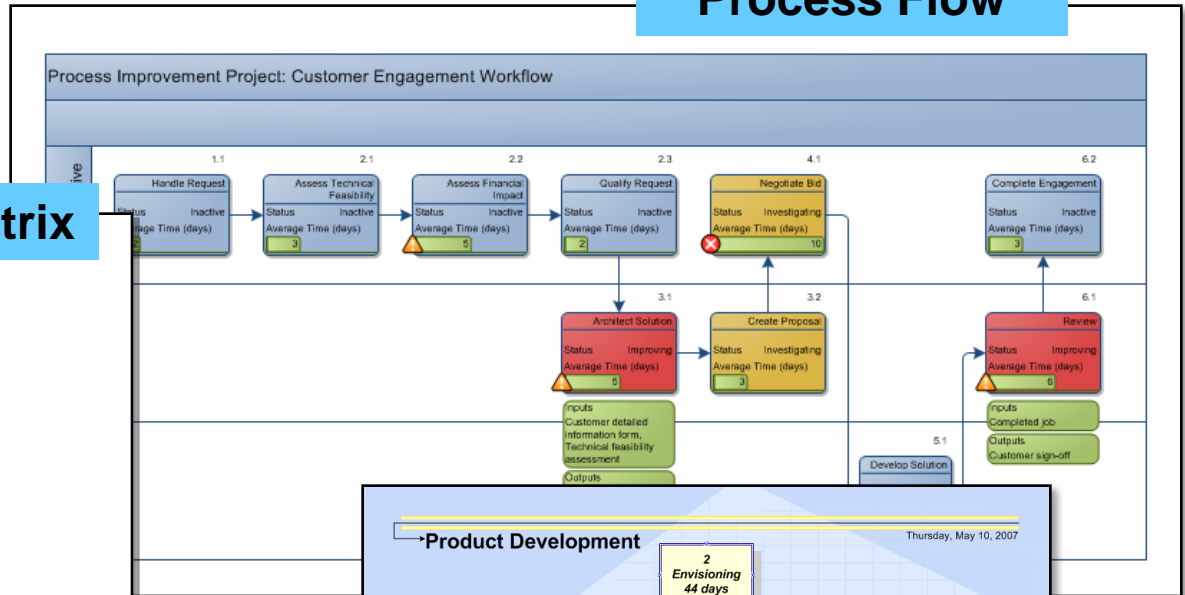
## Gantt Chart

ID	Task Name	Start	Finish	Duration	Jun 2006					Jul 2006						
					6/4	6/11	6/18	6/25	7/2	7/9	7/16					
1	Start Deck	6/10/2006	6/10/2006	0d												
2	Deck Layout	6/10/2006	6/10/2006	0d												
3	Footing Layout and Locations	6/10/2006	6/10/2006	0d												
4	Digging and Pouring Footings	6/10/2006	6/18/2006	3d												
5	Dig Footings	6/10/2006	6/17/2006	2d												
6	Pour & Set Footings & Fasteners	6/17/2006	6/18/2006	1d												
7	Framing	6/18/2006	6/25/2006	2d 3h												
8	Building & Installing Beams	6/18/2006	6/18/2006	0d												
9	Building & Installing Joists	6/24/2006	6/25/2006	2d												
10	Decking	7/1/2006	7/2/2006	2d												
11	Installing Decking	7/1/2006	7/2/2006	2d												
12	Stairs	7/8/2006	7/15/2006	3d												
13	Build box	7/8/2006	7/9/2006	2d												
14	Apply decking and fascia	7/15/2006	7/15/2006	1d												
15	Deck Finishing and Maintenance	7/16/2006	7/16/2006	1d												
16	Spray Finish	7/16/2006	7/16/2006	1d												
17	Overall Safety/Quality Assurance	7/22/2006	7/22/2006	0d												



# Diagram Types

## Process Flow



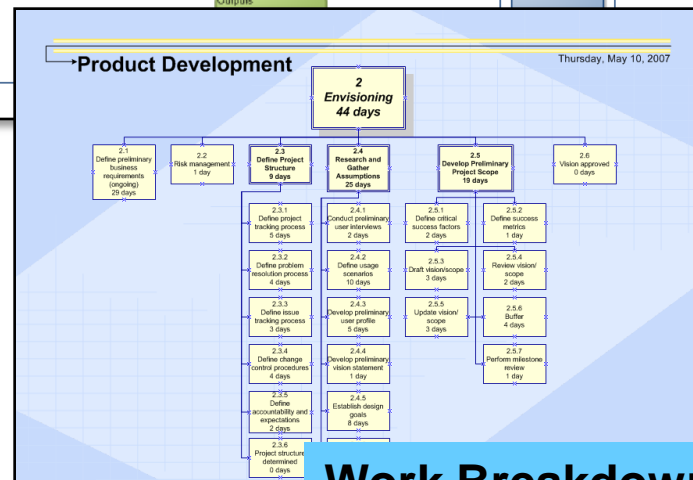
## Responsibility Matrix

	Program Management	Product Management	Development	Testing	Logistics Management	User Education	Support Organization	Customer
Form Team	A	P	P	P	P	P		
Define Project Structure	A	P	P	P		P		
Research/ Gather Assumptions	P	A	P	P				
Develop Prelim Project Scope	A	R	P					
Create Functional Specification	A	I	I					
Create Development Plan	S		A					
Create Test Plan	S			A				
Develop User Education Plan		S		P		A		
Develop Logistics Plan	S				A			P
Develop Project Plan	A	I						
Internal Release 1	R	R						P
Internal Release 2	A	P	R	R	P	P	P	P
Updates Plans and Schedules	A	R		I	I	I		
Beta Release 1	A	P	R	R	P	P	P	P
Release Candidate 1	A	P	R	R	P	P	P	P

**Legend**

- Participant P
- Accountable A
- Review Required R
- Input Required I
- Sign-off Required S

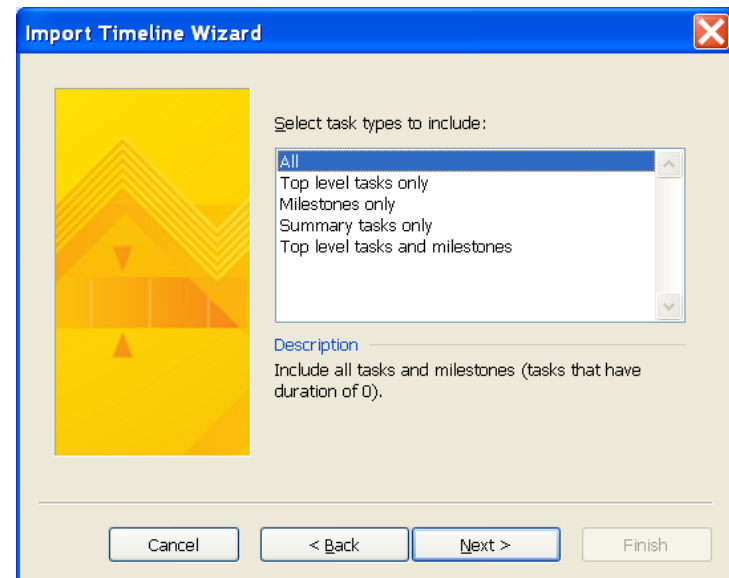
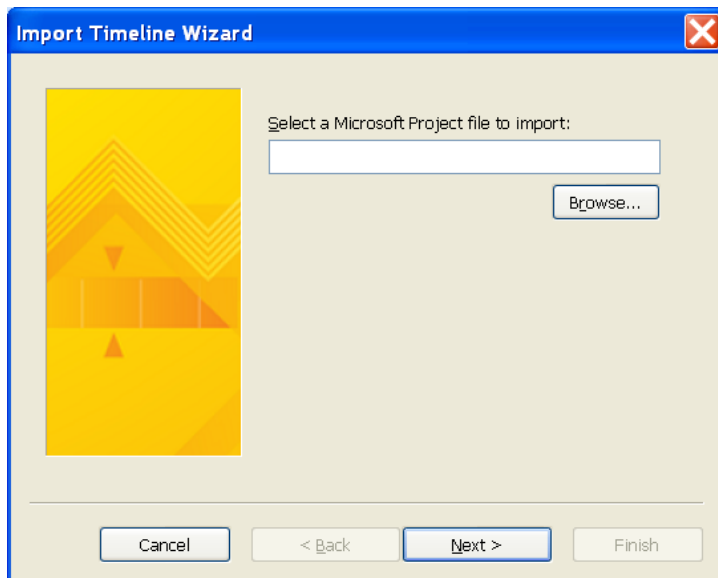
## Product Development



## Work Breakdown

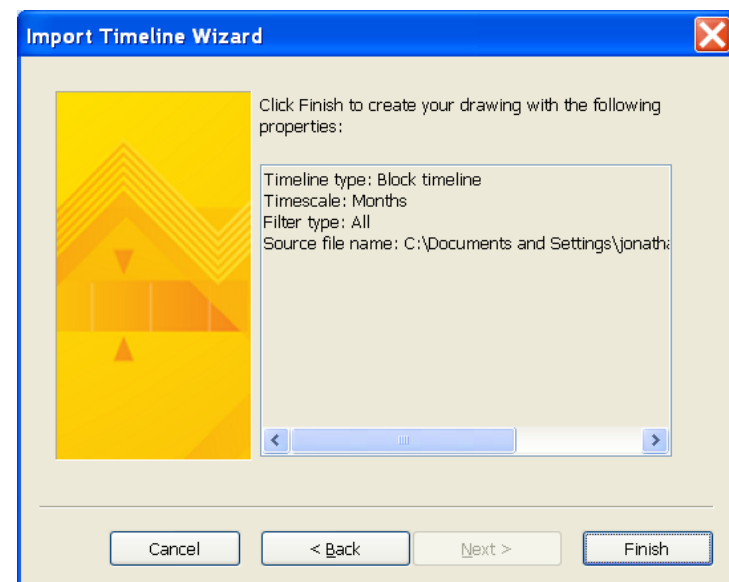
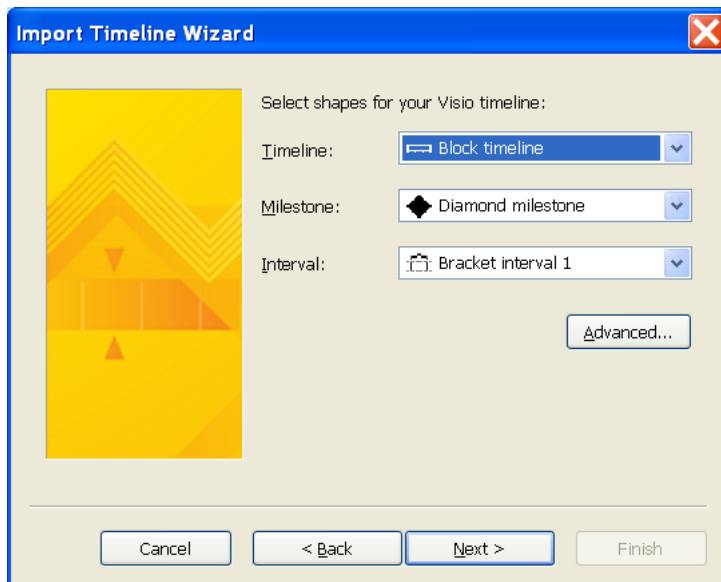
# Import a Timeline

- ◆ (Menu) **Data – Insert Data Solutions – Timeline...**
- ◆ **Browse to Project file**
- ◆ **Select tasks to include**



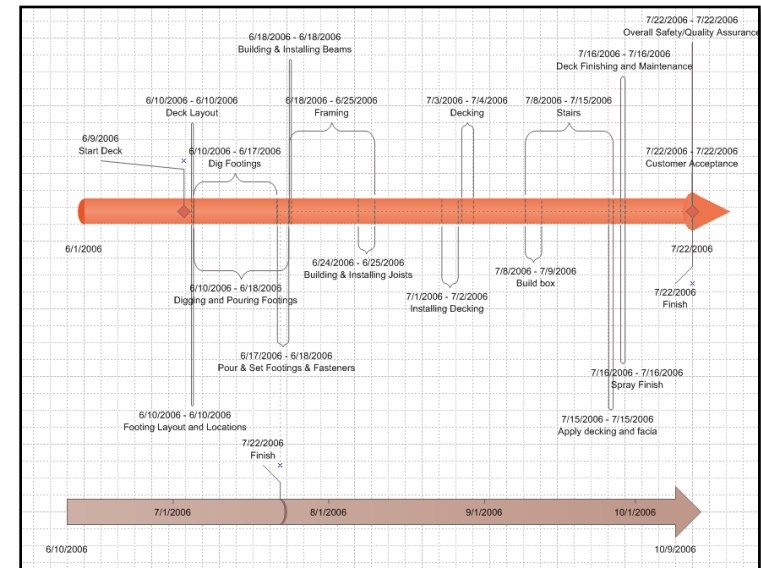
# Import a Timeline

- ◆ **Select shapes for Visio timeline**
- ◆ **Finish**



# Working with a Timeline

- ◆ Reposition text
- ◆ Move intervals and milestones
- ◆ Add intervals and milestones
- ◆ Resize interval shapes
- ◆ Synchronize milestones
- ◆ Alter timeline type
- ◆ Apply theme





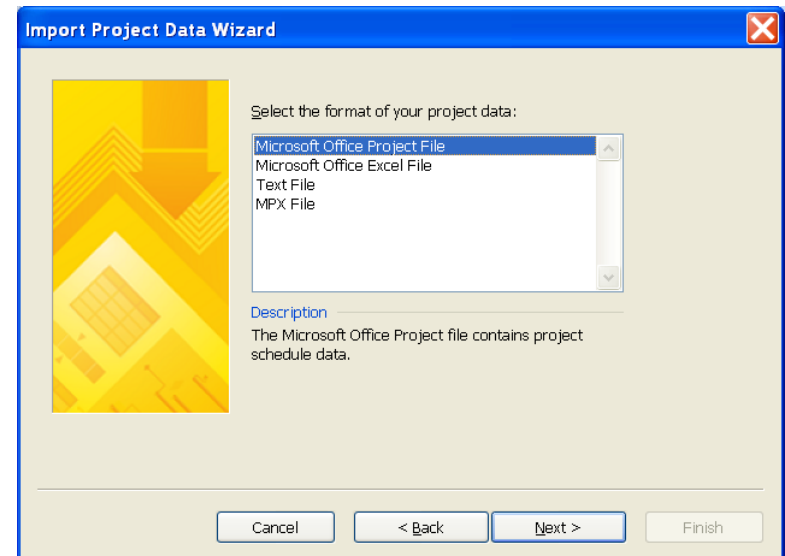
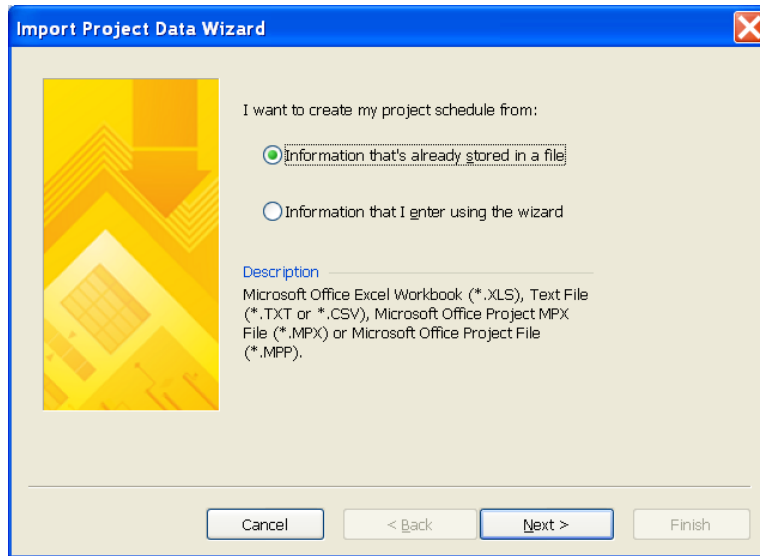
# Applying a Theme

- ◆ Show Theme task pane
  - ◆ (Menu) **Format – Theme...**
- ◆ Select color palette
  - ◆ Click on Theme Colors link
  - ◆ Select theme colors from list
- ◆ Select font, line and connector, fill, and shadow style
  - ◆ Click on Theme Effects link
  - ◆ Select theme effects from list



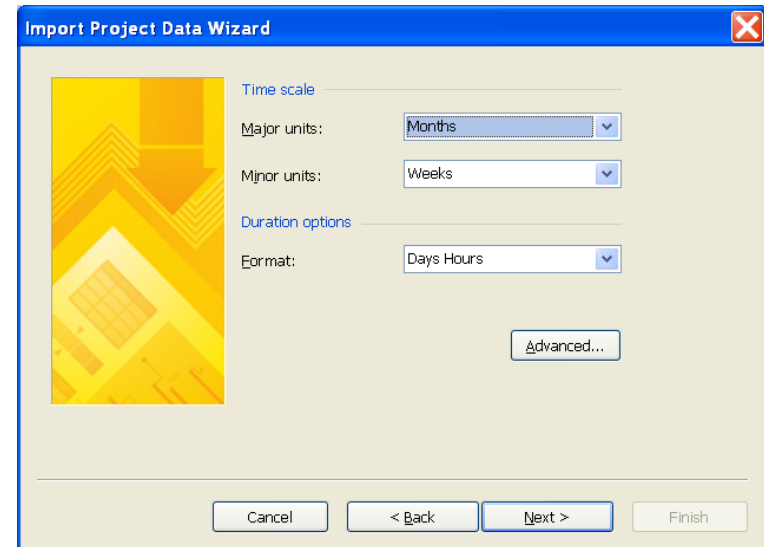
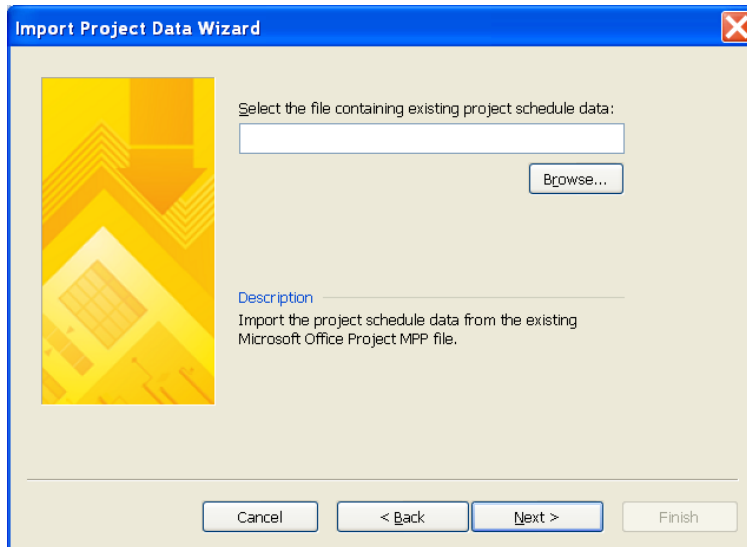
# Import a Gantt Chart

- ◆ (Menu) **Data – Insert Data Solutions – Gantt Chart...**
- ◆ **Select “Information that’s already stored in a file”**
- ◆ **Select “Microsoft Office Project File”**



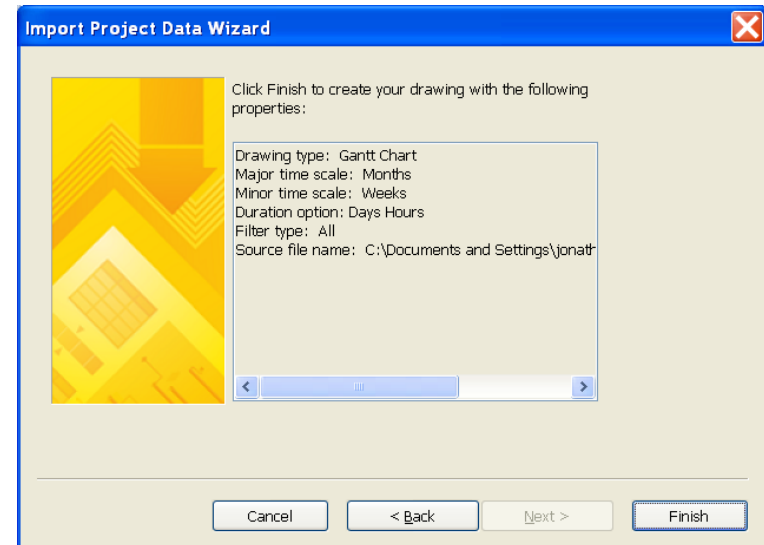
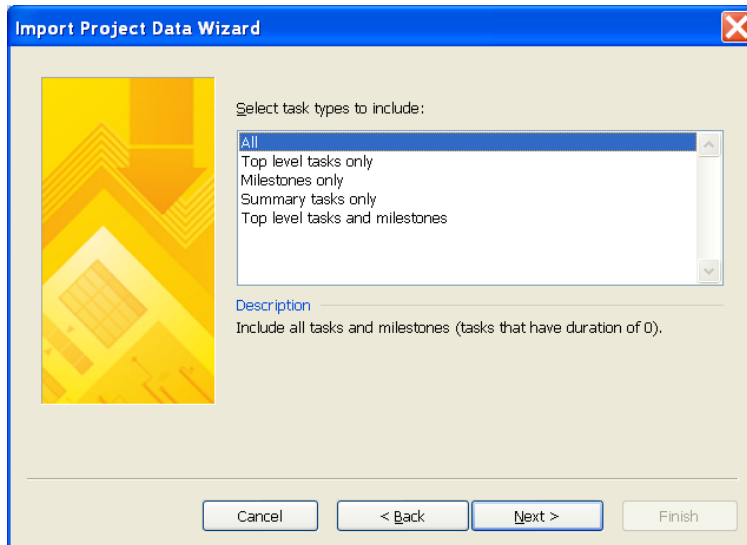
# Import a Gantt Chart

- ◆ **Browse to Project file**
- ◆ **Select Major and Minor time scale units**
- ◆ **Select task duration format**



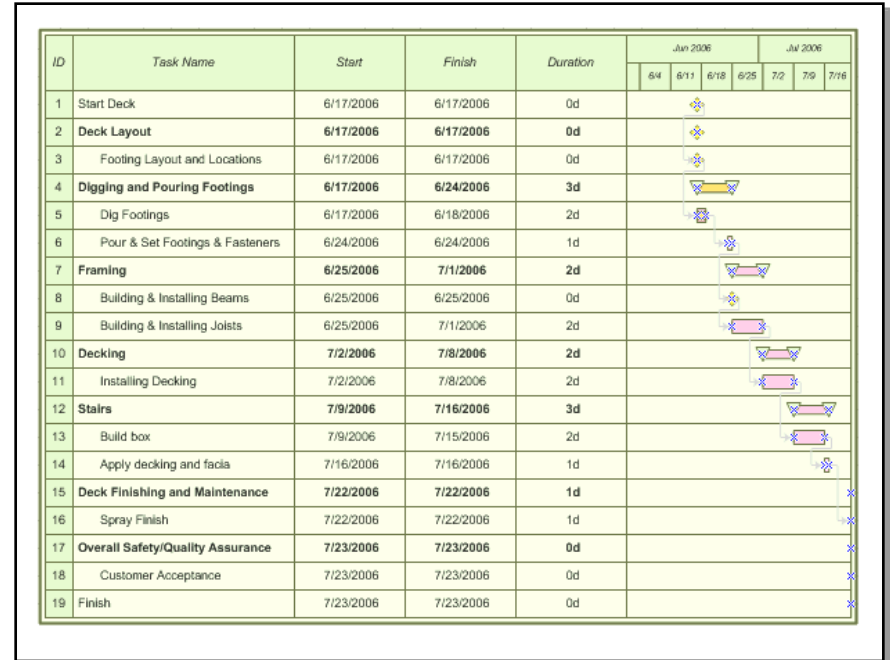
# Import a Gantt Chart

- ◆ **Select task types to include**
- ◆ **Finish**



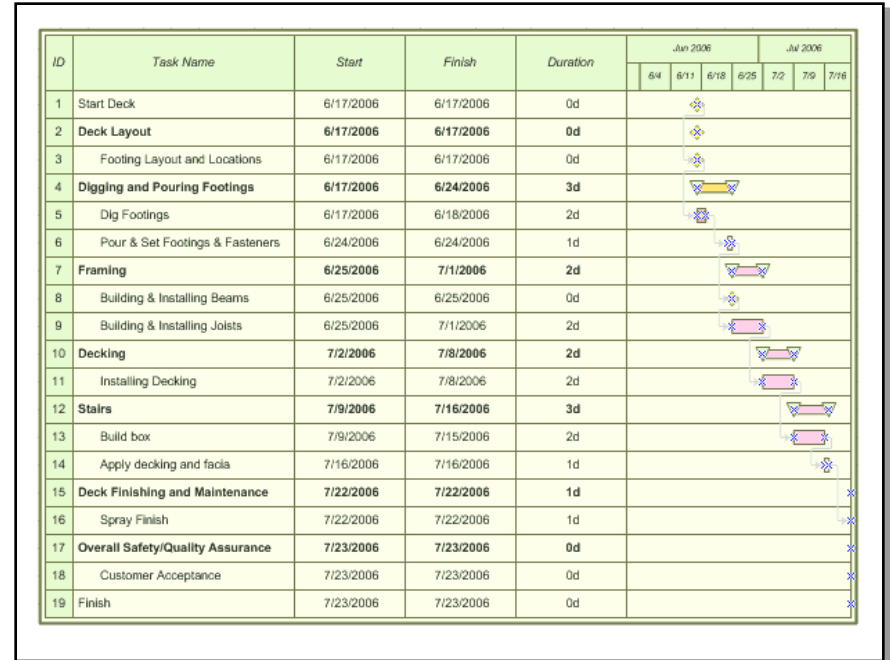
# Working with a Gantt Chart

- ◆ Push project forward/back
  - ◆ Move task bar shapes left/right
- ◆ Create new task links
  - ◆ Drag 'Add Link' control handle to connection point at start or finish of linked task
- ◆ Set % complete
  - ◆ Drag 'Change % complete' control handle



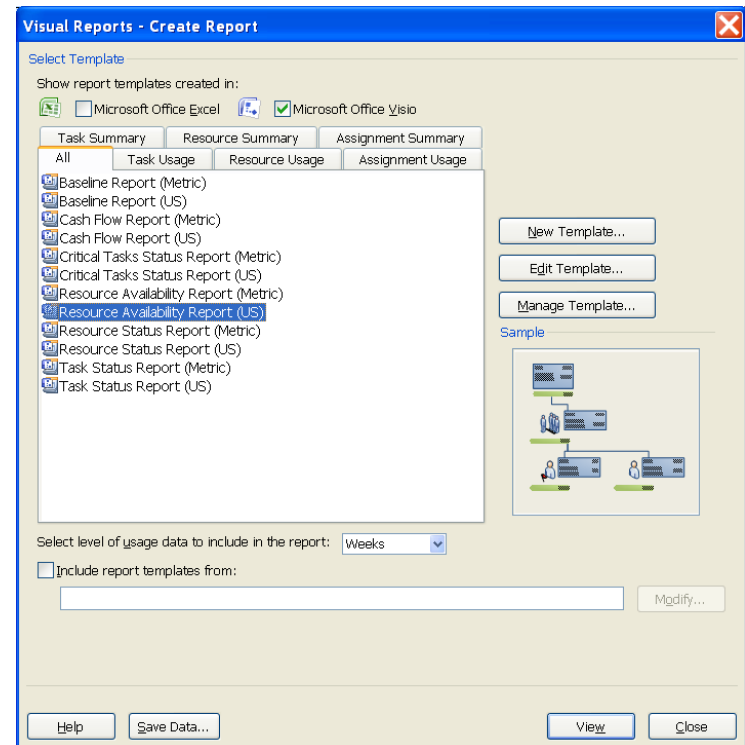
# Working with a Gantt Chart

- ◆ **Modify task list**
  - ◆ Drop task bar shape onto chart to add task
- ◆ **Modify columns**
  - ◆ Drop column onto chart to add column
- ◆ **Right-click shapes for action menu**
- ◆ **Apply theme**



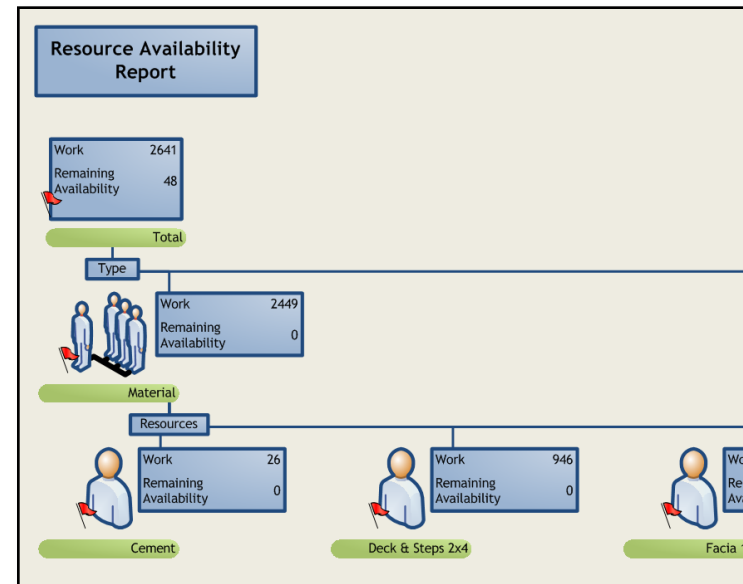
# Export a Project Report to Visio

- ◆ (Menu) **Report – Visual Reports...**
- ◆ **Choose a Visio report**
- ◆ **Select level of usage data to include in report**
- ◆ **View**



# Working with a PivotDiagram

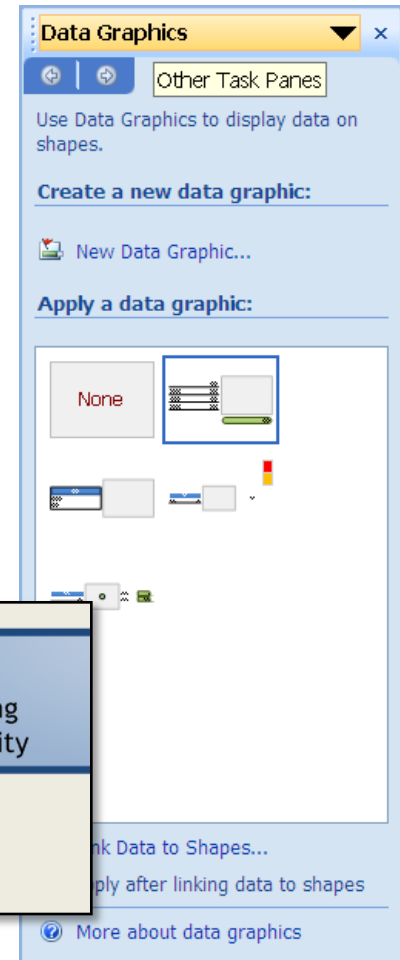
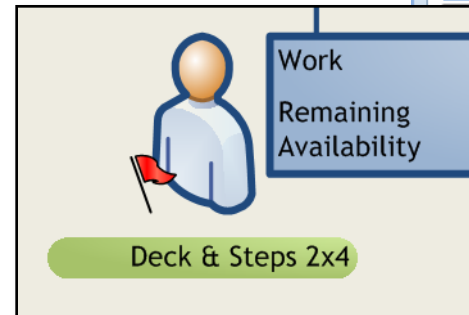
- ◆ Apply theme
- ◆ Apply shape
  - ◆ Open stencil with shape
    - ◆ (File) Shapes
    - ◆ Work Flow Objects, Department automatically opened
  - ◆ Select nodes
  - ◆ (PivotDiagram pane) **Apply Shape...**
  - ◆ Choose stencil from dropdown
  - ◆ Choose shape to apply
- ◆ Apply Data Graphics





# Data Graphics

- ◆ Turn on display
  - ◆ (Menu) **Data – Display Data on Shapes**
- ◆ Select Data Graphic format from Task Pane
- ◆ Edit Data Graphic if required
  - ◆ (Right Click) **Data – Edit Data Graphic**
- ◆ Displays Shape Data values
  - ◆ Text
  - ◆ Relative graphs
  - ◆ Colors
  - ◆ Icons



# Working with a PivotDiagram

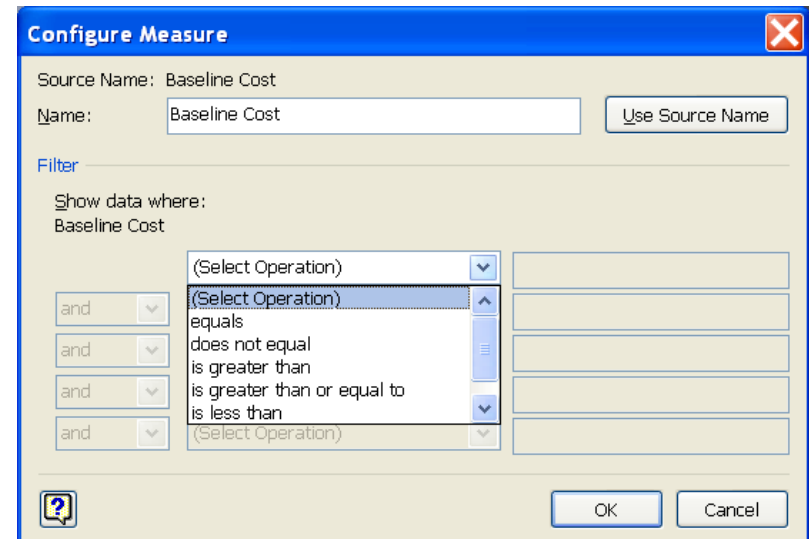
- ◆ **Aggregate numerical data**
  - ◆ **Select field from Add Total on PD pane**
  - ◆ **Select aggregate type from dropdown (if avail.)**
    - ◆ **Sum**
    - ◆ **Average**
    - ◆ **Minimum value**
    - ◆ **Maximum value**
    - ◆ **Count**



2006	
Work	2641
Baseline Work	0
Cost	\$ 7,710
Baseline Cost	\$ 0

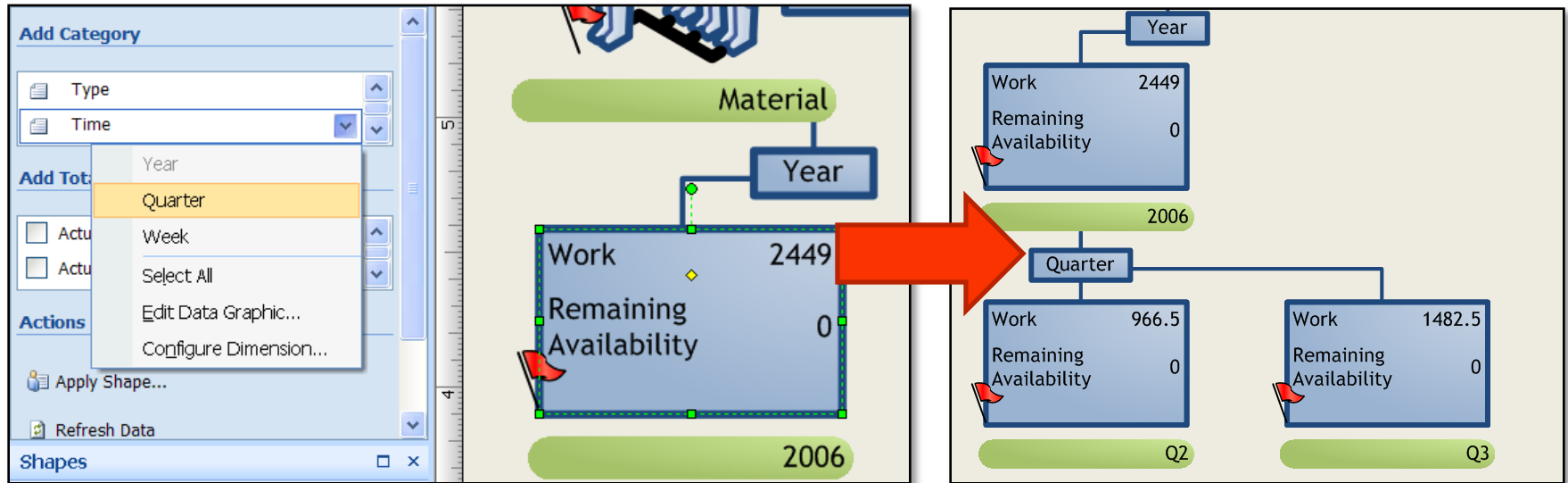
# Working with a PivotDiagram

- ◆ **Filter Data**
  - ◆ **Open dropdown for measure to filter in Add Category or Add Totals on PD task pane**
  - ◆ **Select Configure Measure/Column/Dimension**
  - ◆ **Select filter operation**
    - ◆ **=, !=, >=, <=**
    - ◆ **Enter value**



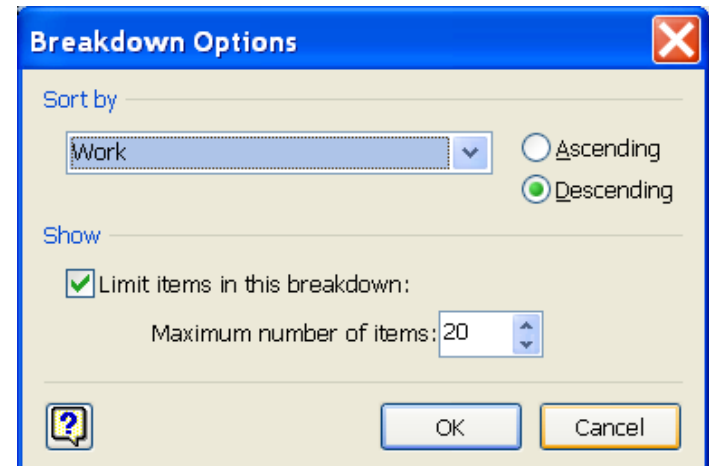
# Working with a PivotDiagram

- ◆ Add category breakdown
  - ◆ Select node
  - ◆ Click category in Add Category on PD taskpane
    - ◆ Open dropdown, select level for multi-level category



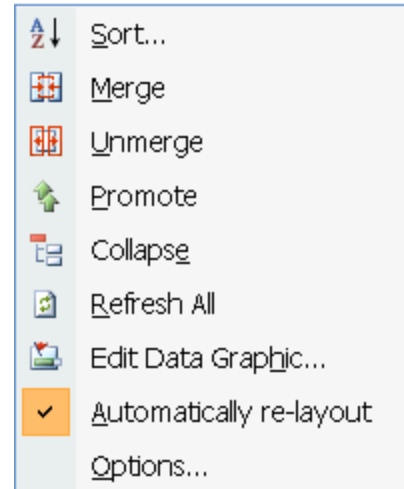
# Working with a PivotDiagram

- ◆ **Sort nodes**
  - ◆ **Select all nodes in level**
  - ◆ **Click Other Actions button on PD task pane**
  - ◆ **Select Sort...**
  - ◆ **Choose sort property**
  - ◆ **Choose ascending or descending**
  - ◆ **Limit number of nodes shown**



# Working with a PivotDiagram

- ◆ **Other tasks**
  - ◆ **Merge/Unmerge nodes on same level**
  - ◆ **Promote node**
  - ◆ **Collapse node**
  - ◆ **Refresh data after changes to source**



# Other Diagram Types

- ◆ **Create a flowchart**

- ◆ **Basic Flowchart**

- ◆ **Open Visio template**

- ◆ **(Menu) File – New – Flowchart – Basic Flowchart**

- ◆ **Cross-Functional Flowchart**

- ◆ **Open Sample**

- ◆ **(Menu) File – New – Getting Started...**

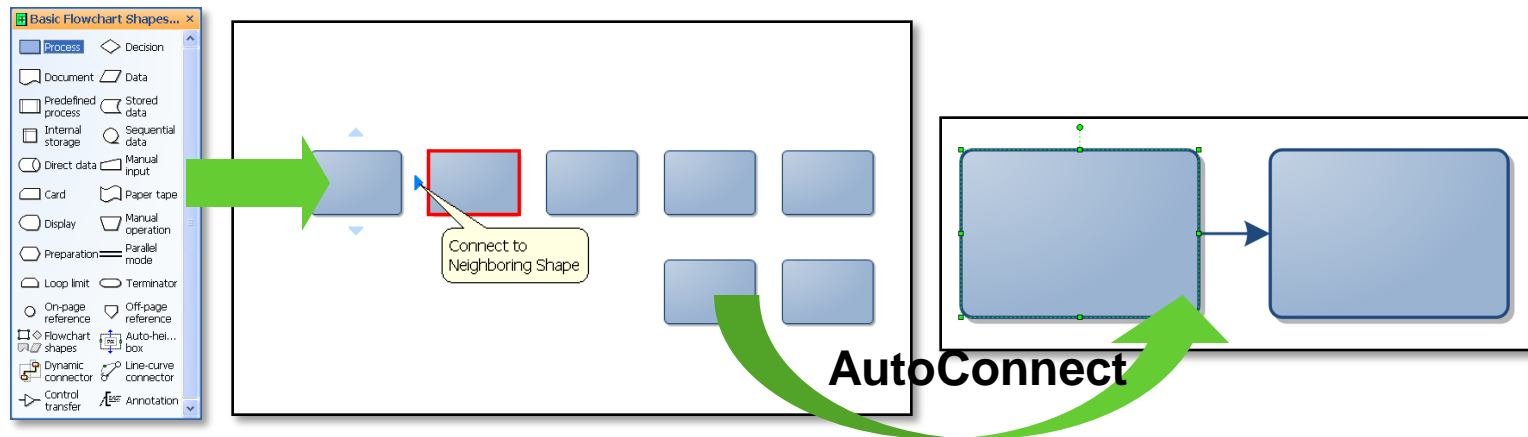
- ◆ **Samples – Process Improvement – Open Diagram**

- ◆ **Open Template**

- ◆ **(Menu) File – New – Flowchart – Cross-Functional Flowchart**

# Other Diagram Types

- ◆ **Basic flowchart**
  - ◆ Drag shapes from stencils
  - ◆ Connect shapes
    - ◆ AutoConnect or Connector Tool





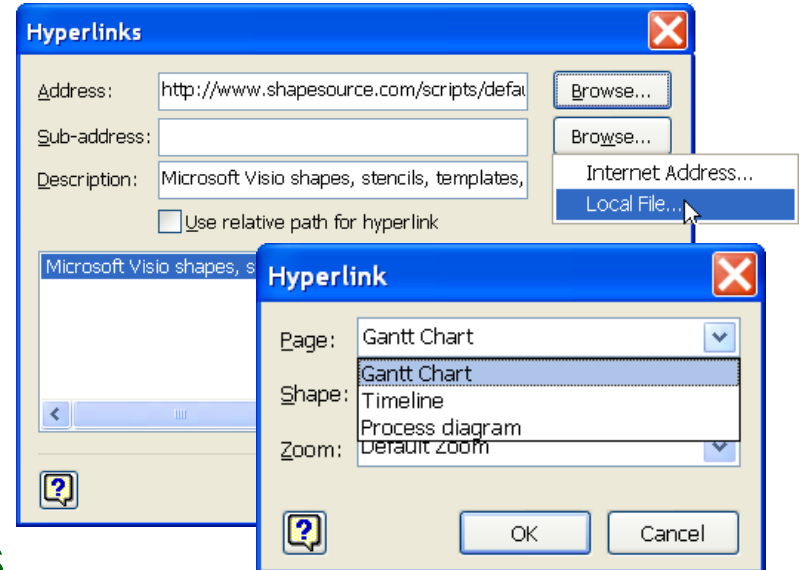


# Other Diagram Types

- ◆ **WBS Modeler Add-In**
  - ◆ <http://www.wbsmodeler.com/>
- ◆ **Responsibility Matrix**
  - ◆ **Custom Visio template**

# Use Hyperlinks

- ◆ Reference data in other files or Web sources
  - ◆ Open URL's
  - ◆ Open local files
  - ◆ Open specific page in Visio file
- ◆ Create “drill down” navigation
- ◆ Insert a Hyperlink
  - ◆ (Menu) **Insert – Hyperlinks**
  - ◆ Select Address and Sub-Address (page)
  - ◆ Enter Description for right-click shape menu
  - ◆ Supports multiple Hyperlinks on a shape



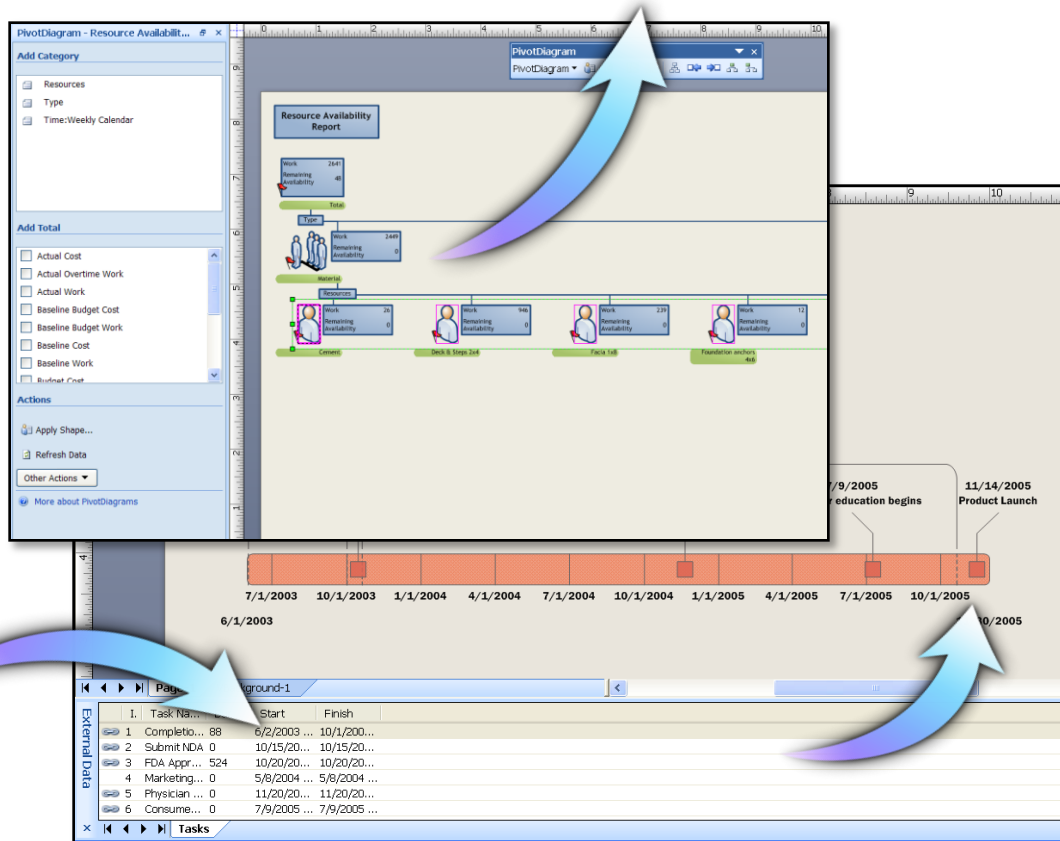
# Result: Consolidated Project View



Hyperlink to other local and remote reference information



Import and display data from Project, Excel or Database



Link the data to Visio shapes and display the data using Data Graphics