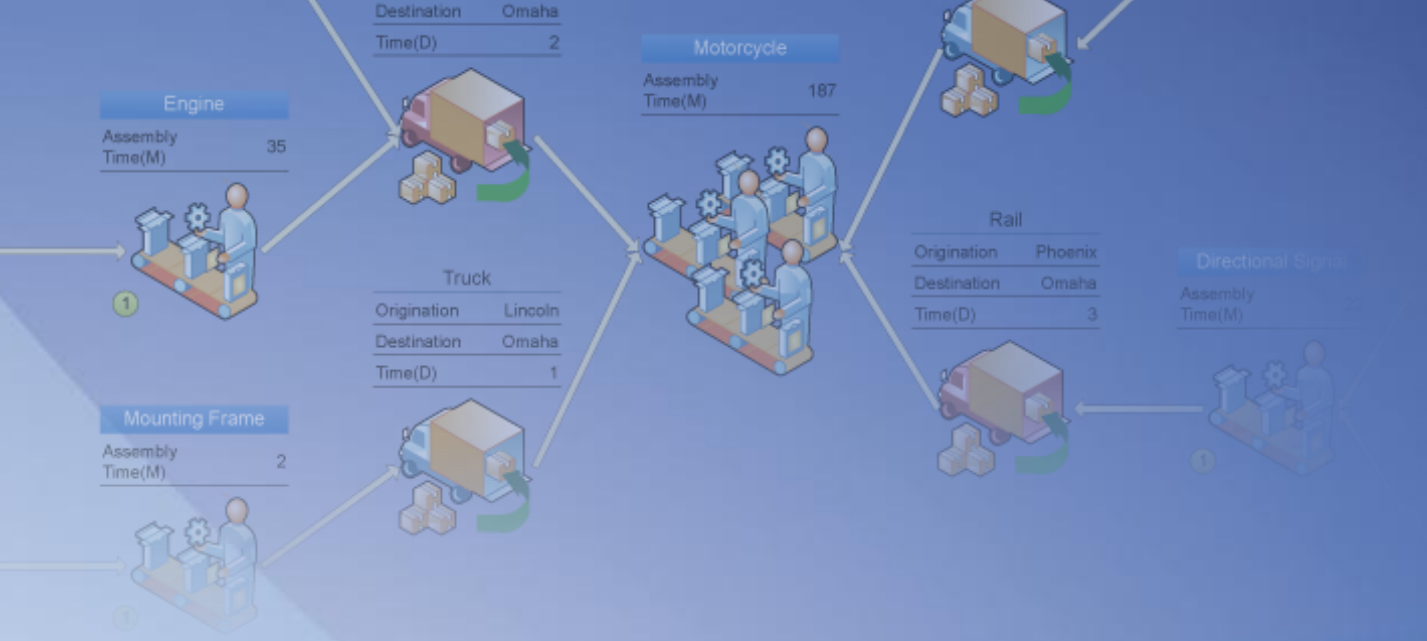

Microsoft® Visio® 2010

Using Visio® 2010 and SharePoint® 2010 for Process Management: Practical Tips and Customer Examples

Chris Crane | Director
A.J. Briant | Senior Product Manager
June 29, 2011

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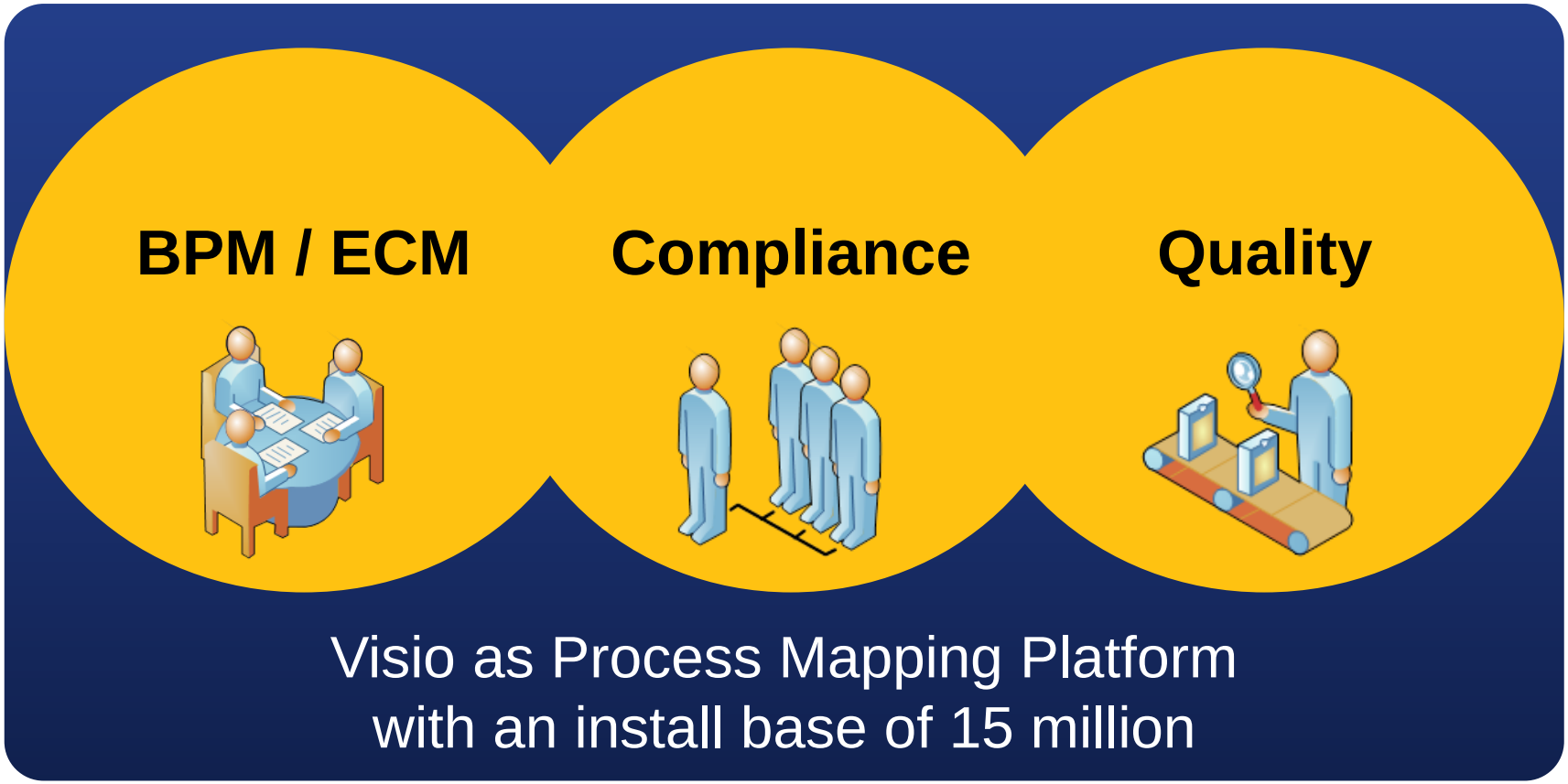
Webinar Topics

1. Moving from sticky notes to process documents: how to save time documenting process models
2. Standardizing process notation and attributes: how to use the new BPMN template, how to standardize process attributes and how to validate process maps against business rules
3. Automating human and document centric: how to use Visio to model SharePoint workflows and execute and visualize them in SharePoint 2010 without any coding
4. Using Visio to monitor your business processes: how to connect Visio process models to external data and use them as dashboards in SharePoint 2010

Democratization of Process Management

- Strategy Goal for Visio Premium 2010
- Focus on BPM/ECM, Compliance, and Quality as scenarios with 66 pre-defined templates and shapes
- A leader in process mapping tool



Visio 2010 Key Investments in Process

- Ease of Use
- SharePoint Workflow
- Visio Services

Customer Investments in Microsoft Technology

BPM Maturity Model on Microsoft Technologies

4 Business activity monitoring

Microsoft® SQL Server® | Microsoft® SharePoint® | Microsoft® Visio®

3 Automate human and document centric workflow

Level 2

Microsoft® SharePoint® | Microsoft® Visio®

Level 1

Windows Server® | Microsoft® Visio®

2 Standardize process notation & information

Microsoft® Visio®

1 Capture paper-based process diagrams

Microsoft® Office | Microsoft® Visio®

1 Capture Paper-based Processes

Global Crossing

"Ease of use features and efficiencies gained from the new Visio 2010 Ribbon toolbar enables us to generate proposed network solutions for our customers 10 to 25 percent faster."
Ted Smith, Principal Sales Engineer, Global Crossing

Global IP Solutions Provider shortens time to create Visio diagrams and improves effectiveness of sales proposals

Customer Business Challenge

- Global Crossing is a leading global IP and Ethernet solutions provider offering a full range of data, voice and collaboration services.
- Global Crossing wanted to address the challenges that sales engineers experienced creating network diagrams during the customer sales cycles.

Solution

- Global Crossing deployed Microsoft Visio Premium 2010 to help improve the visual representation of network diagrams and process flows with new improved drawing and formatting capabilities.

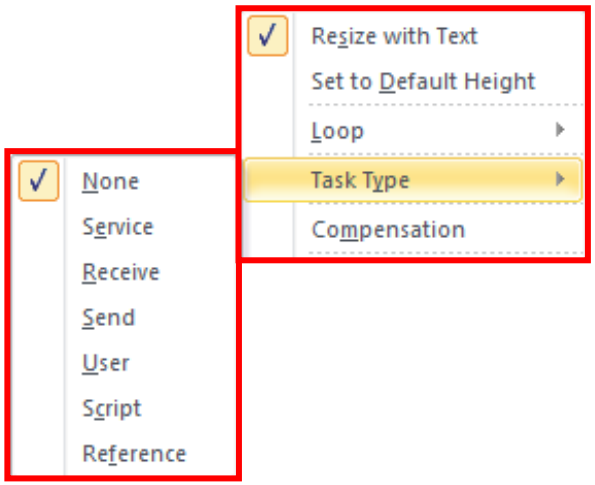
Customer Results/Benefits

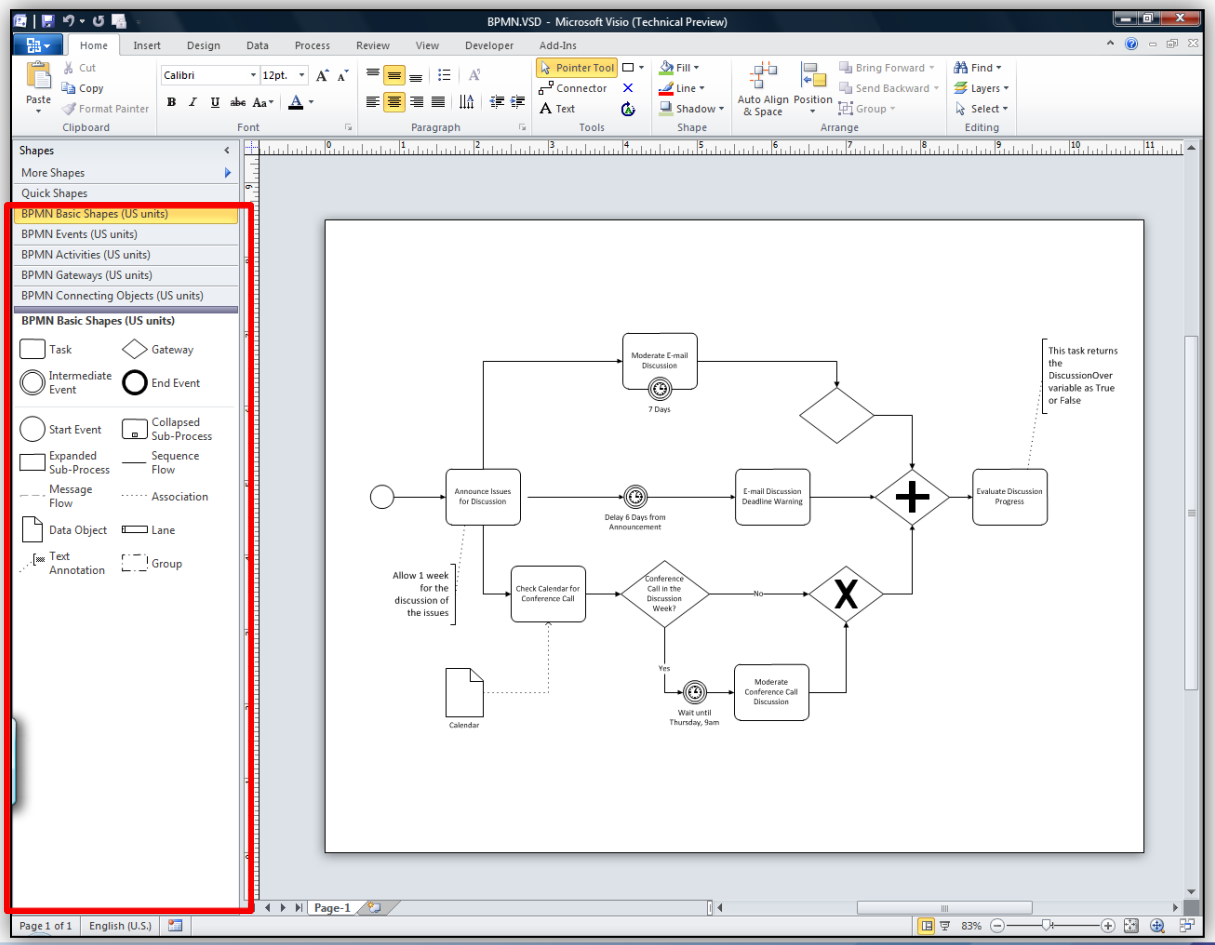
- Shortens time to create Visio diagrams
- Improves effectiveness of sales proposals

BPMN (Business Process Modeling Notation)

BPMN template provides sophisticated process modeling with BPMN 1.2 rule validation

To change model type, right-click diagram and choose model definition from menu





Microsoft

"Our Visio Premium 2010 solution will help us ensure that the right people are doing the right work at the right time across our business processes"
Jean O'Connor, HR Project Manager, Microsoft Corporation

Microsoft Human Resources Organization Optimizes Process Execution Worldwide

Customer Business Challenge

- Microsoft International's Human Resources (HR) team lacked standardized business processes and business process documentation across its subsidiaries, decreasing process efficiency and effectiveness.

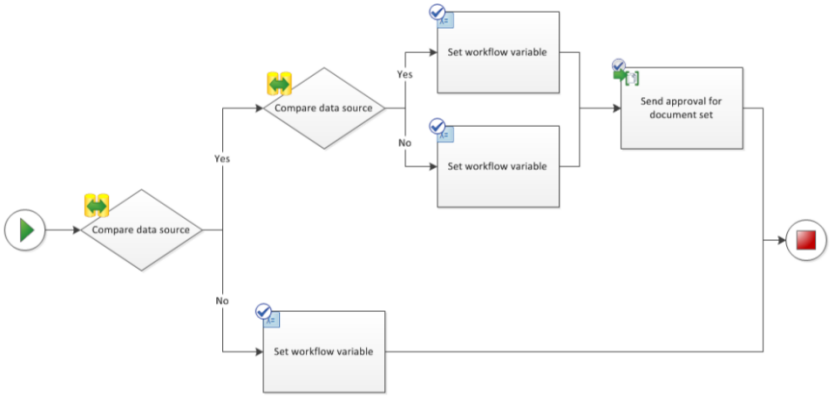
Solution

- The HR team used Visio Premium 2010 and the newly developed HR BPMN process template to develop comprehensive process documentation across all of the sales, marketing and services locations in Microsoft International, covering approximately 100 countries.

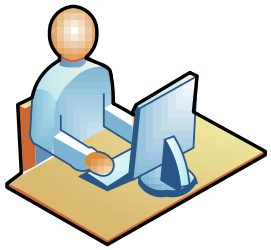
Customer Results/Benefits

- Significant anticipated savings in labor hours through increased process efficiency
- Anticipated decrease in new hire onboarding time
- Improved decision making through visual process analysis

Microsoft® Visio® Premium 2010

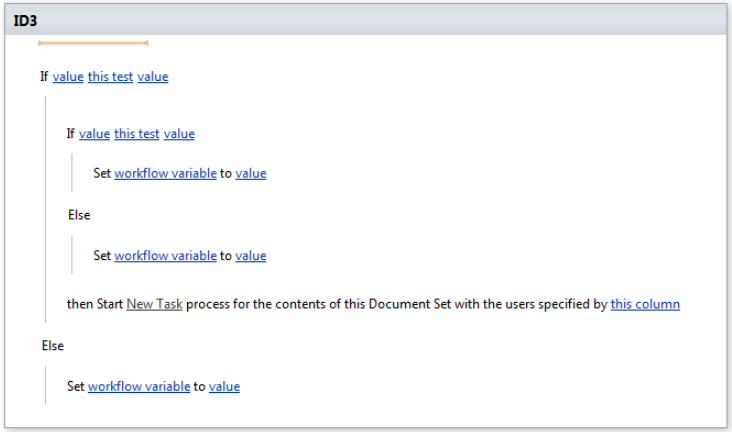


- Pre-defined SharePoint Workflow Template
- Graphically model SharePoint Workflow

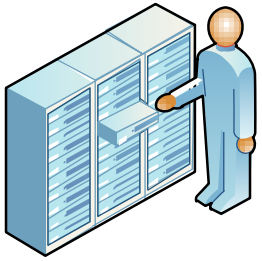


Business Analyst

Microsoft® SharePoint® Designer 2010



- List-base workflow in SPD

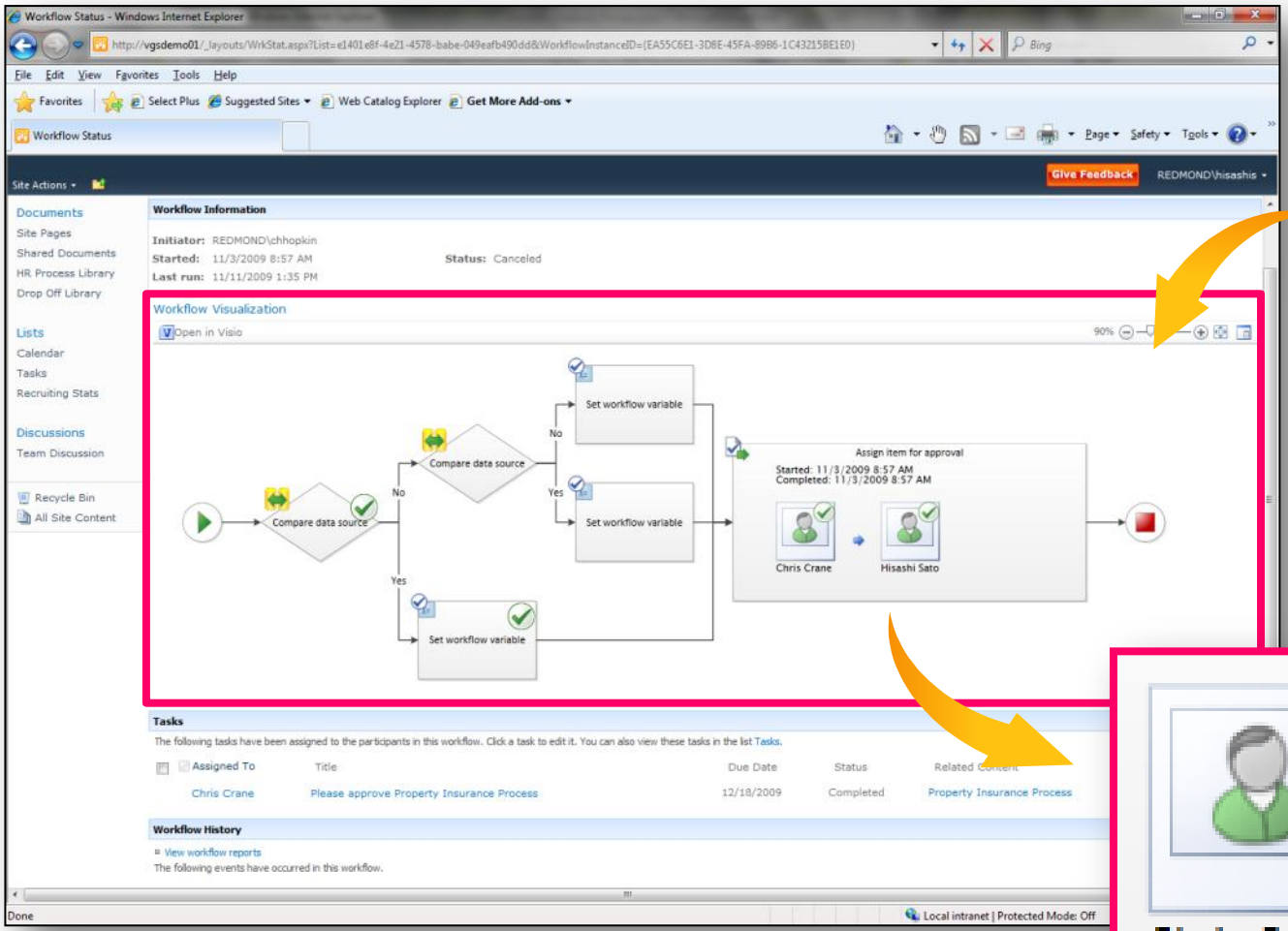


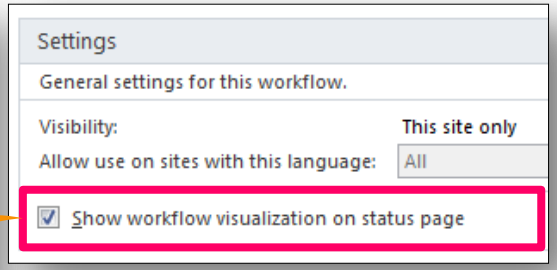
Portal Administrator

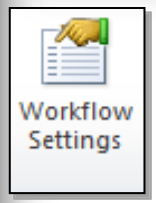
4 Monitor process performance

Microsoft SQL Server | Microsoft SharePoint | Microsoft Visio

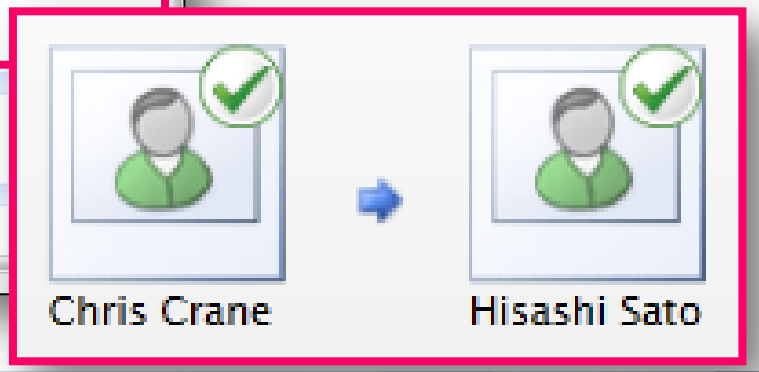
SharePoint 2010 provides pre-defined webpart for monitoring SharePoint workflow







In SharePoint Designer 2010, click Workflow Settings to activate Workflow Visualization in SharePoint Site



Microsoft Visio 2010

BM.I
BUNDESMINISTERIUM FÜR INNERES

"With the workflow and design capabilities in Visio 2010, we reduced the time to develop the solution significantly."
Roman D'Alessio, ICT Head, Austrian Ministry of the Interior

Ministry Reduces Purchasing Time by 66 Percent with Productivity Software Upgrade

Customer Business Challenge

- The Ministry ordered equipment using a paper-based process that caused delays, and employees had no way to view the status of ordered items. Nor did field officers have a way to access or update information about cases they were investigating.

Solution

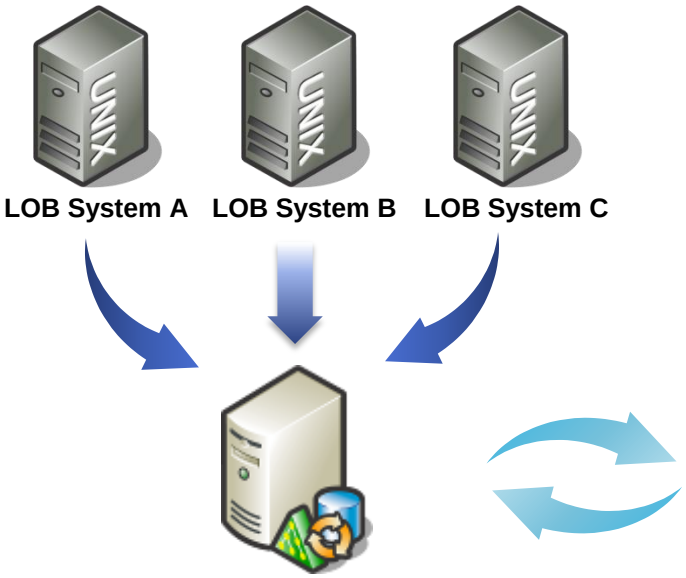
- The Ministry deployed Microsoft Office 2010, Microsoft Visio 2010, and Microsoft SharePoint Server 2010 to take advantage of business process design, workflow, and monitoring capabilities.

Customer Results/Benefits

- Faster purchasing cycle time
- Reduced paper and printing costs
- Reduced IT development costs
- Faster completion of investigation reports

http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?CaseStudyID=4000007515

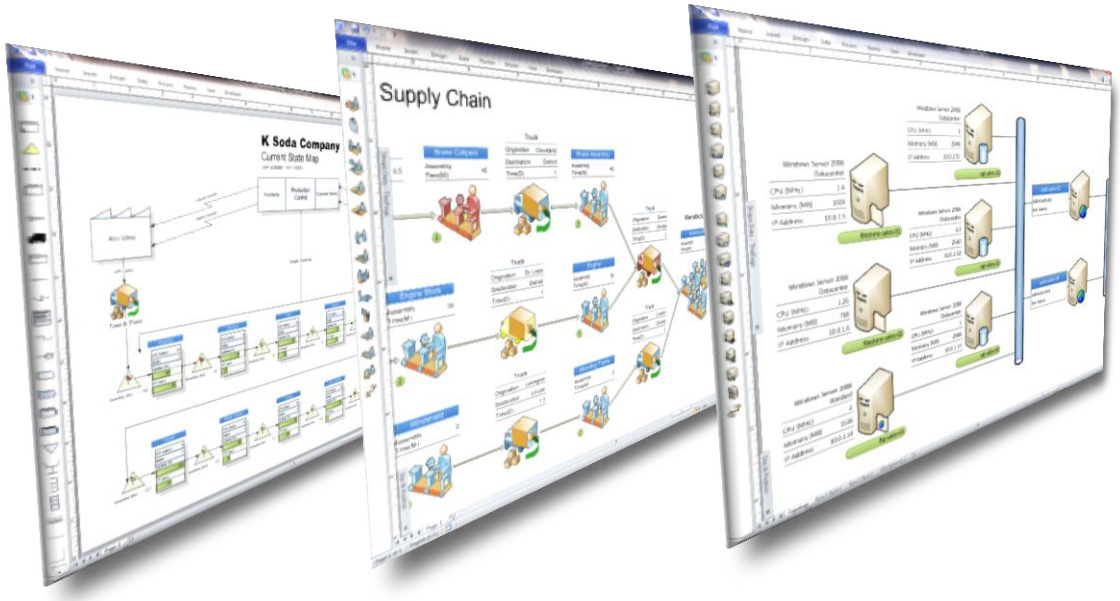
Visio Diagram can be front-end of LOB system



Microsoft SharePoint

Microsoft SQL Server

View diagram in web browser



Value Stream Map | Supply Chain Diagram | Network Diagram

"I believe SharePoint and Visio will change the way John Holland conducts its business. It will help us to be more disciplined in our processes approach and to engage with our end users in understanding the business processes and requirements. It's a big change agent for us."

Les Oates, CIO, John Holland

Australian Construction Firm Benefits From Integrated Business Collaboration Platform

Customer Business Challenge

- With large numbers of projects and business procedures John Holland had difficulty managing its documentation and ensuring users understood how procedures and processes related to specific tasks

Solution

- John Holland is partnering with Stargate Global Consulting to deploy Microsoft SharePoint 2010 as its application process delivery portal, integrated with Microsoft Visio Premium 2010 to produce and publish project documentation.

Customer Results/Benefits

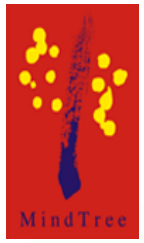
- Increases productivity
- Improves collaboration
- Reduces IT costs
- Increases ease of access

http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?CaseStudyID=4000007330

Summary: Visio and SharePoint for BPM

Customers are gaining tangible and measurable business benefits

- Ease-of-use: Visio can be broadly used for BPA and BPM
- Microsoft platform integration: Visio leverages SharePoint, Office 365, SQL and Office in BPM solutions
- Document and Human-Centric Workflow: Visio, SharePoint and Office 365 automate a variety of workflows with zero coding
- Broad partner ecosystem: partners deliver full BPMS and vertical solutions on top of Visio and SharePoint



Partner ecosystem in Process Management

Two tier + SI approach through ***out of box*** features and partner solution

- Starting with easy process mapping
- Focus on human & document centric workflow
- Leverage customer's existing IT investment in Microsoft Technology
- Leverage Microsoft's partner for end to end BPMS implementation

Q & A

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Microsoft® Visio® 2010

For more information

- Visio 2010: www.visiotoolbox.com
- Visio 2010 and SharePoint 2010 for process management:
  http://visiotoolbox.com/2010/process-management.aspx
- Case studies:
  http://visiotoolbox.com/2010/case-studies.aspx
- Visio Premium 2010 Free Trial
  http://visiotoolbox.com/2010/trial-downloads.aspx
- 3 free white papers and sample templates for using Visio 2010 to improve business processes, compliance and quality
  http://visio.microsoft.com/en-us/Pages/Free-Business-Process-downloads-for-Modern-Analyst-Webinar-Attendees.aspx