

# Excel Add-in

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VISIO DATA VISUALIZER FOR EXCEL

WWW.QBI.



*Business Excellence. Achievement.*

## About The Presenter

Presented by



Vijay S Shukla

- Founder and Principal Trainer at Qbi Institute ([www.qbi.in](http://www.qbi.in))

- 20 years + of experience in IT business analysis domain

- 500+ trainings conducted for Govt of Mauritius, HCL Perot Systems, Markit & other

- Bachelors of Engineering from IIT Roorkee, Masters in Management from IIT Bombay

# Be Ready with your Excel File

VISIO DATA VISUALISER ADDIN WORKS  
ONLY WITH EXCEL FOR MICROSOFT 365

(AS ON JAN 2021)



AutoSave  Off 📄 ↶ ↷ VisioDataVisualiser 🔍 Search

File Home **Insert** Page Layout Formulas Data Review View Help

PivotTable Recommended Table Pictures Shapes SmartArt Get Add-ins My Add-ins Recommended Charts Maps PivotChart 3D Map Line Column Win/Loss Slicer

Tables Illustrations Add-ins Charts Tours Sparklines

P11 ✕ ✓ fx

1	Process Step ID	Process Step Description	Next Step ID	Connector Label	Shape Type	Alt Text
2	P50	Start	P100		Start	
3	P100	Parent process	P200,P300,P400		Process	
4	P200	Level 1 process	P500,P600		Process	
5	P300	Level 1 process				
6	P400	Level 1 process				
7	P500	Level 2 process				
8	P600	Level 2 process				
9	P700	Level 2 process				
10	P800	Level 2 process				
11	P900	Level 2 process				

Edit Refresh ...

89%

# HIERARCHY DIAGRAM



Account

User Information

Vijay Shekhar Shukla  
vijay@bacourse.onmicrosoft.com

Change photo  
About me  
Sign out  
Switch account

Account Privacy  
Manage Settings

Office Background:  
Clouds

Office Theme:  
Colorful

Connected Services:

- OneDrive - Self  
vijay@bacourse.onmicrosoft.com
- Sites - Self  
vijay@bacourse.onmicrosoft.com

Add a service

Product Information

Microsoft

Subscription Product  
Microsoft 365 Apps for business

Belongs to: vijay@bacourse.onmicrosoft.com  
This product contains

Manage Account Change License

Office Updates  
Updates are automatically downloaded and installed.

Update Options

About Excel  
Learn more about Excel, Support, Product ID, and Copyright information.  
Version 2012 (Build 13530.20376 Click-to-Run)  
Current Channel

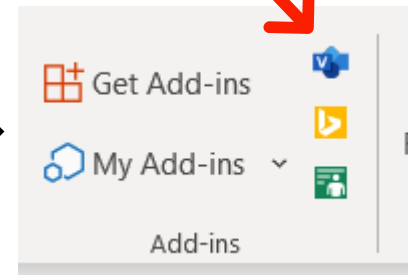
What's New  
See the most recently installed updates.

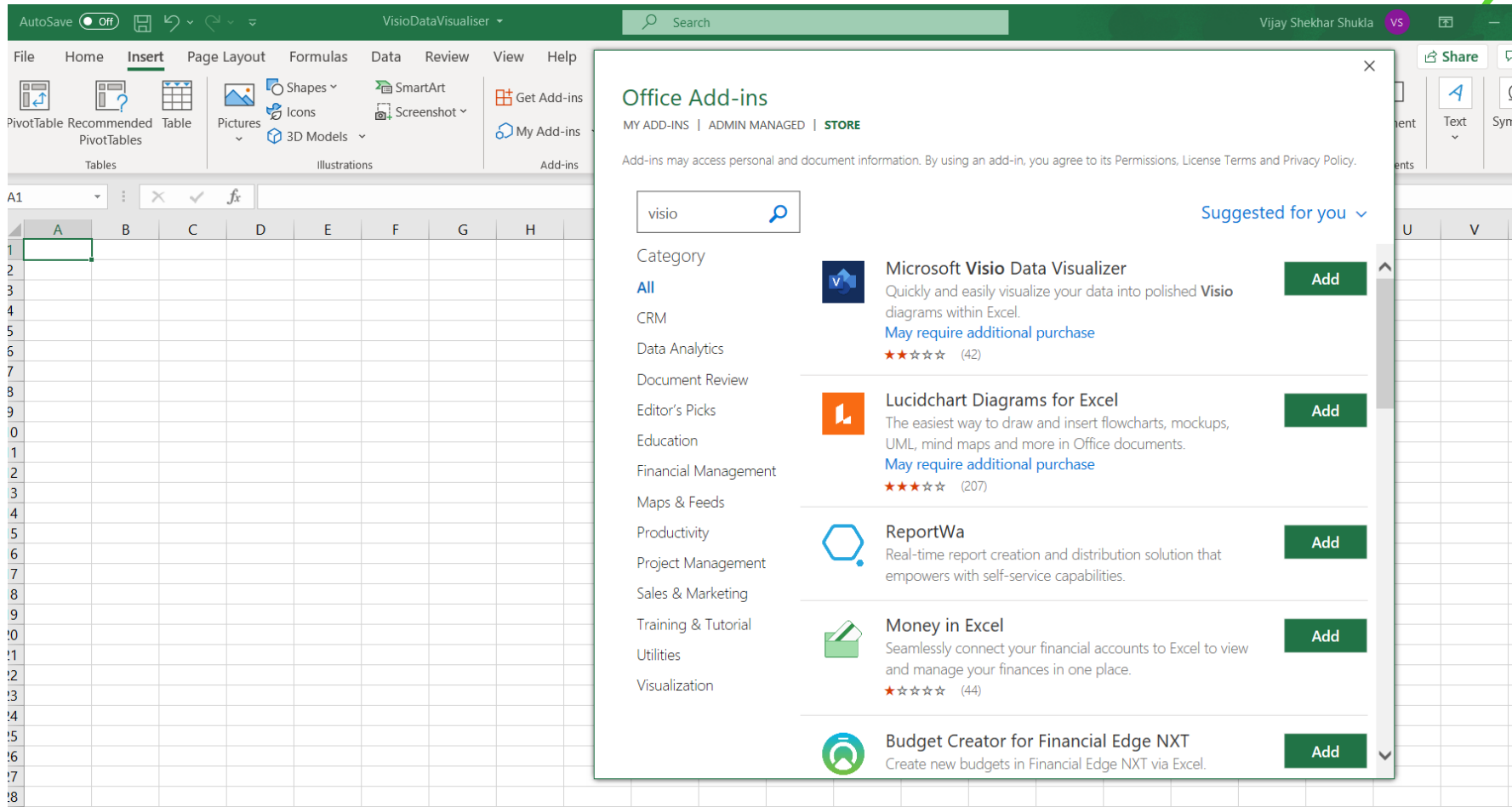
CHECK WHETHER YOU HAVE A EXCEL  
FOR MICROSOFT 365 EDITION



# Add Visio Data Visualiser Addin

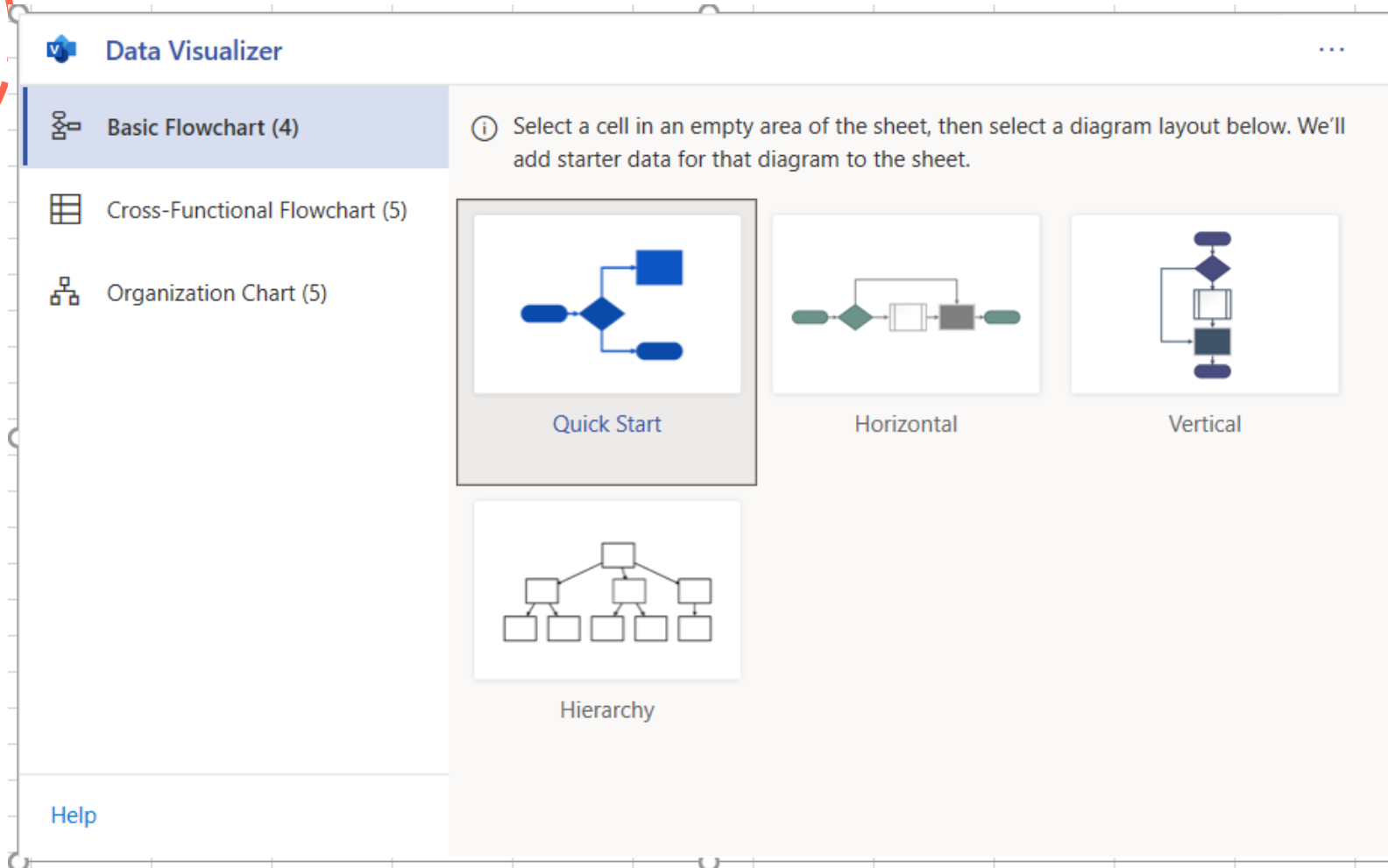
INSERT → GET ADD-IN →





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# MICROSOFT VISIO DATA VISUALIZER ADD-IN



# BASIC FLOWCHART, CROSS-FUNCTIONAL FLOWCHART, ORGANISATION CHART





# Let's prepare Basic Flowchart - Hierarchy

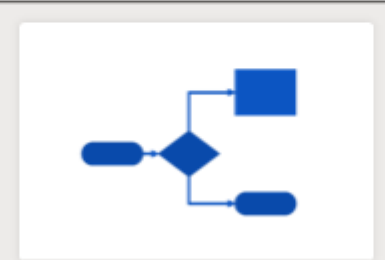
INSERT → ADD-INS →



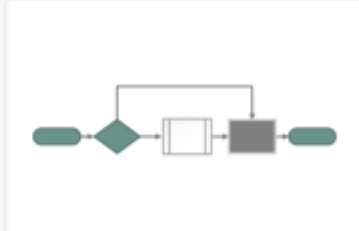
**Data Visualizer**

- Basic Flowchart (4)
- Cross-Functional Flowchart (5)
- Organization Chart (5)

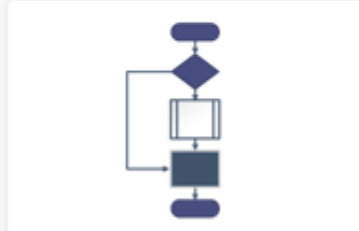
Select a cell in an empty area of the sheet, then select a diagram layout below. We'll add starter data for that diagram to the sheet.



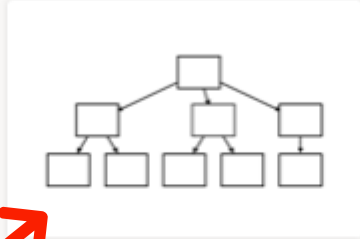
Quick Start



Horizontal



Vertical



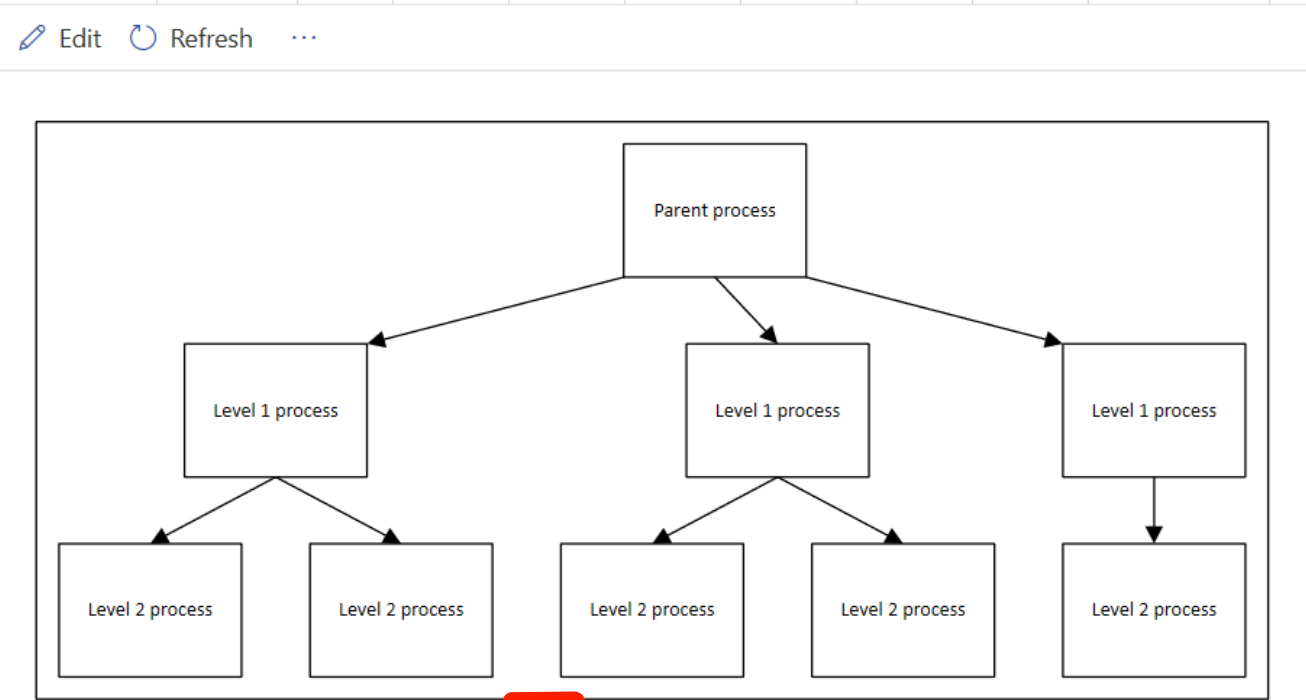
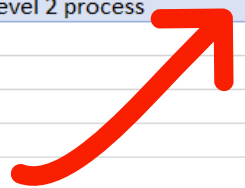
Hierarchy

Help

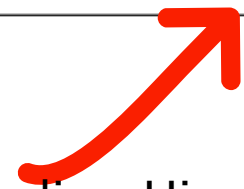


Process Step ID	Process Step Description	Next Step ID	Connector Label	Shape Type	Alt Text
P100	Parent process	P200,P300,P400		Process	
P200	Level 1 process	P500,P600		Process	
P300	Level 1 process	P700,P800		Process	
P400	Level 1 process	P900		Process	
P500	Level 2 process			Process	
P600	Level 2 process			Process	
P700	Level 2 process			Process	
P800	Level 2 process			Process	
P900	Level 2 process			Process	

Underlying Data



Corresponding Hierarchy Model



Process Step ID	Process Step Description	Next Step ID	Connector Label	Shape Type	Alt Text
P100	Parent process	P200,P300,P400		Process	
P200	Level 1 process	P500,P600		Process	
P300	Level 1 process	P700,P800		Process	
P400	Level 1 process	P900		Process	
P500	Level 2 process			Process	
P600	Level 2 process			Process	
P700	Level 2 process			Process	
P800	Level 2 process			Process	
P900	Level 2 process			Process	

UNDERSTAND TABLE FORMAT  
WHICH GETS TRANSFORMED INTO A  
VISUAL MODEL

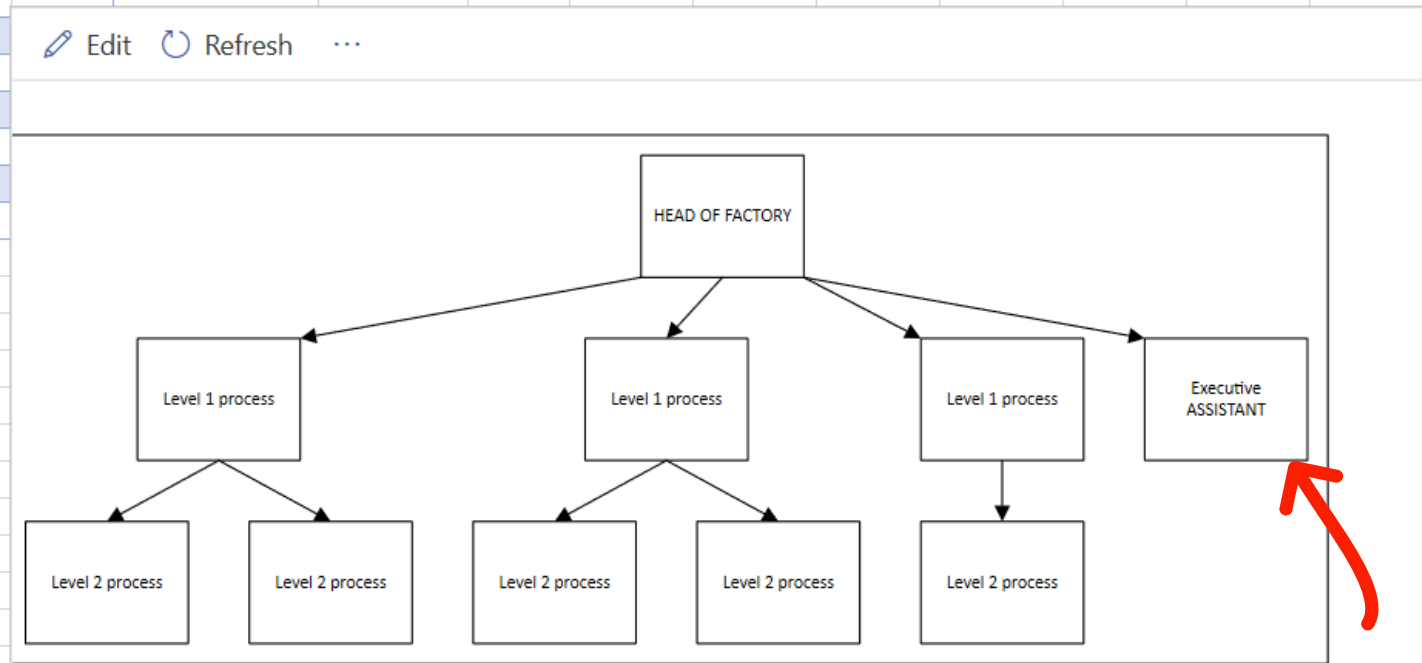


Process Step ID	Process Step Description	Next Step ID	Connector Label	Shape Type	Alt Text
P100	Parent process	P200,P300,P400		Process	
P200	Level 1 process	P500,P600		Process	
P300	Level 1 process	P700,P800		Process	
P400	Level 1 process	P900		Process	
P500	Level 2 process			Process	
P600	Level 2 process			Process	
P700	Level 2 process			Process	
P800	Level 2 process			Process	
P900	Level 2 process			Process	

- Row header: For the row header exactly same words in same table format have to be used for model generation. It is case sensitive as well. Eg next step ID and not ~~next ID~~ or ~~next step id~~
- Process Step ID: It is the unique number attributed to the shape
- Process Step Description: It is the Label or Description which will come over the shape in the visual or the model
- Next Step ID: Is (are) the next shapes connected with the current one via connector. For more than one shapes provide the next step id delimited with comma ","
- Connector Label: It is the label on the connector(connecting arrow) which connects the next shape. It follows the same syntax as Next Step ID
- Shape Type: These are the shapes available in the Flow Chart stencil in MS Visio. On the Data Table you are provided with a drop down with the Shapes which you can use.
- Alt Text: Is the Alternative text which the screen readers may read and spell out to persons with visual limitations. It is advisable to provide the alt text to every shape in your visual.



Process Step ID	Process Step Description	Next Step ID	Connector Label	Shape Type	Alt Text
P100	HEAD OF FACTORY	P200,P300,P400,P150		Process	
P150	Executive ASSISTANT			Process	
P200	Level 1 process	P500,P600		Process	
P300	Level 1 process	P700,P800		Process	
P400	Level 1 process	P900		Process	
P500	Level 2 process			Process	
P600	Level 2 process			Process	
P700	Level 2 process			Process	
P800	Level 2 process			Process	
P900	Level 2 process			Process	



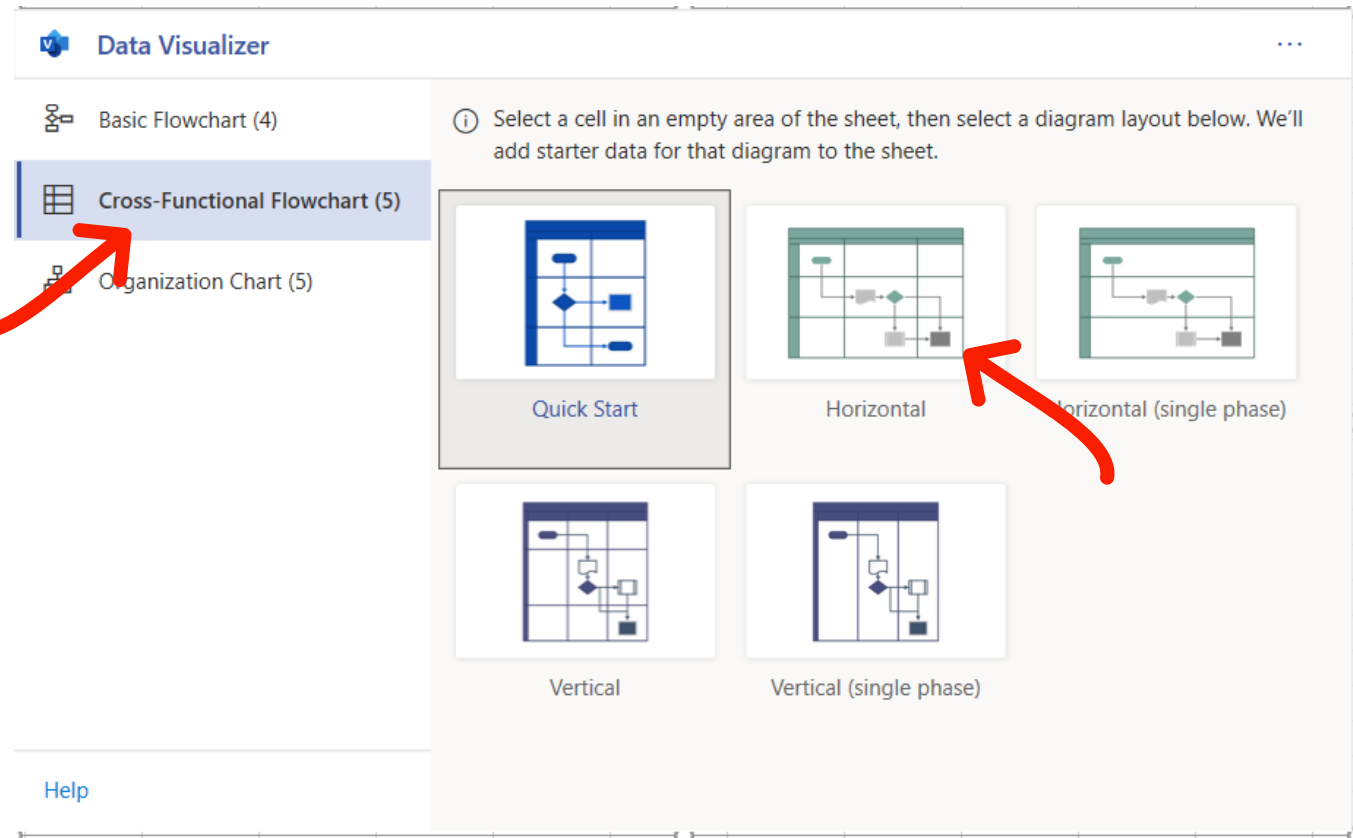
FOCUS ON NEW ROW AND ALTERED MODEL



# Build a Cross-functional Flow chart

CTRL + ENTER



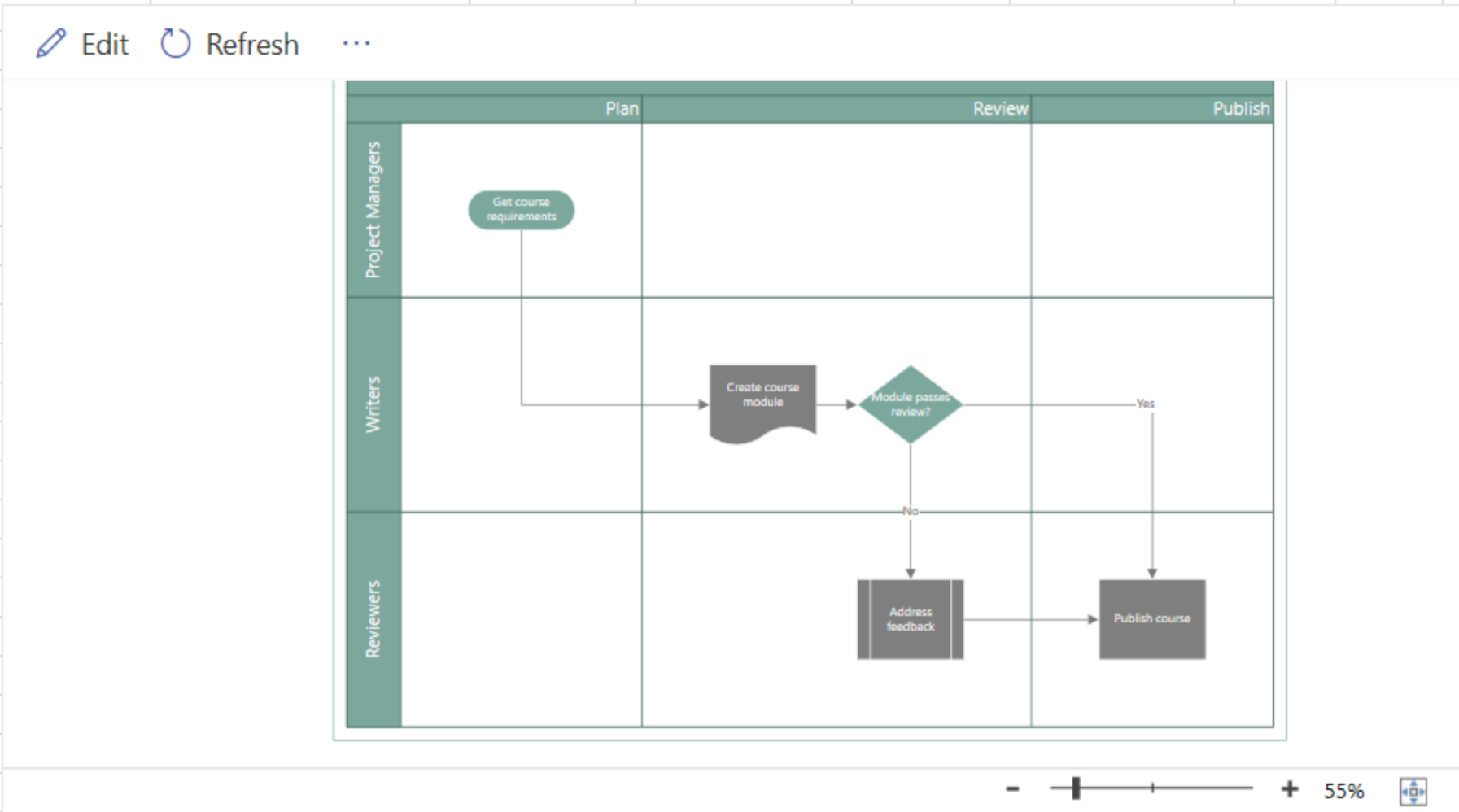


## CROSS FUNCTIONAL FLOWCHART HORIZONTAL





	A	B	C	D	E	F	G	H	I	J
1	<b>Process Step ID</b>	<b>Process Step Description</b>	<b>Next Step ID</b>	<b>Connector Label</b>	<b>Shape Type</b>	<b>Function</b>	<b>Phase</b>	<b>Alt Text</b>		
2	P100	Get course requirements	P200		Start	Project Managers	Plan			
3	P200	Create course module	P300		Document	Writers	Review			
4	P300	Module passes review?	P400,P500	Yes,No	Decision	Writers	Review			
5	P400	Publish course			Process	Reviewers	Publish			
6	P500	Address feedback	P400		Subprocess	Reviewers	Review			
7										



# IMPORTANT POINTS

- Additional Reading: <http://tiny.cc/0wl8tz> , <http://tiny.cc/jwl8tz>
- You require Microsoft 365 account for utilising this add-in in Excel
- The said diagram can be edited on the web Visio Online Plan 1 or Visio Online Plan2 if you have Visio Subscription
- You can download the visual on Visio Desktop if you have Visio Plan 2 Subscription
- If you are provided with data about a process or organisational hierarchy you can convert that into a visual
- Professionals with a data mindset can prepare Visuals using this Add-in



# Thank-you

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