

## TaskMap Tech Note

### TaskMap Layout and Style Conventions

While there are few absolutely right or wrong ways to create a TaskMap, Harvard Computing Group has adopted a number of mapping conventions that make TaskMaps easier to look at and easier to read. Feel free to use the suggestions below as guidelines and adapt them to your personal and organizational style.

#### Naming Conventions

- Use logical and consistent page IDs for all pages so that the resulting Task IDs will be consistent. In some organizations, it may be helpful if the Page ID relates to the organization structure, functional units or hierarchy.
- Start all Task descriptions with an action-oriented verb and be concise. For example, “Create preliminary budget”, “Write proposal”, “Log support call”, “Notify customers of change”.
- Use Task Link descriptions that indicate what just happened or what needs to happen next.

#### Map Layout

- Use landscape orientation for TaskMap pages.
- Place 8-10 Tasks on a letter-sized (8.5x11 inch) or A4 page. If you need to include more Tasks, consider increasing the size of the drawing page (refer to TaskMap templates 2 and 4 for examples; also refer to *Adjusting Drawing Page and Printer Page Size* under *Map Design and Layout* in the *Helpful Hints* chapter of the TaskMap help text).
- Wherever possible, arrange Tasks so the process flows from left-to-right and from top-to-bottom on each page.
- Task Link arrows should enter a Task from the left and exit on the right. Sometimes drawing Task Links this way takes a bit more space on the page but it helps the reader if you can preserve the left-to-right flow. For example, in the map in Appendix A, note that Task Links between several pairs of Tasks could have been drawn with shorter lines. However, the layout of the Task Links listed below preserves the left-to-right process flow:
  - “Prospect data added” from A03 to A04
  - “Pricing rejected” from A07 to A06
  - “Pricing override rejected” from A09 to A07
- Use Visio’s Align and Position functions to improve Task placement and spacing (both buttons are in the *Arrange* group on the *Home* tab).
- Avoid crossing lines. Sometimes it’s impossible to achieve this goal; other times it requires a bit of rearranging, but eliminating crossed lines allows the reader to focus more quickly on the content of the map without being distracted by figuring out which line goes where.
- Include a Label shape with every Connector so the reader knows where the Connector will take them or where they’ve come from to get to the current page.
- If your TaskMap contains four or more map pages, consider adding a dashboard or navigation page to the front of the document. On the navigation page, draw the high-level flow of the process using one Task shape to represent each primary sub-process. Then create a hyperlink from each Task shape to the appropriate sub-process page

## Map Style

- Apply a bolder line weight to the Task Links on the “expected” or “normal” path through a process. A bold line allows the reader to pick out the normal path very quickly. (Right-click any Task Link and select *Format Shape* to adjust line properties.)
- Apply colors to exception paths in a process, for example, red is a good color for negative or rejection paths. (Right-click any Task Link and select *Format Shape* to adjust line properties.) Refer to the sample map in Appendix A.
- Apply fill colors to Tasks to which you want to call the reader’s attention. (Right-click any Task and select *Format Shape* to adjust fill properties.)
- Use color sparingly – a little goes a long way.

## Custom TaskMap Templates

As described in the TaskMap help text, you can create custom TaskMap Templates to store those things that you want to reuse in multiple TaskMaps. A custom template might contain any or all of the following:

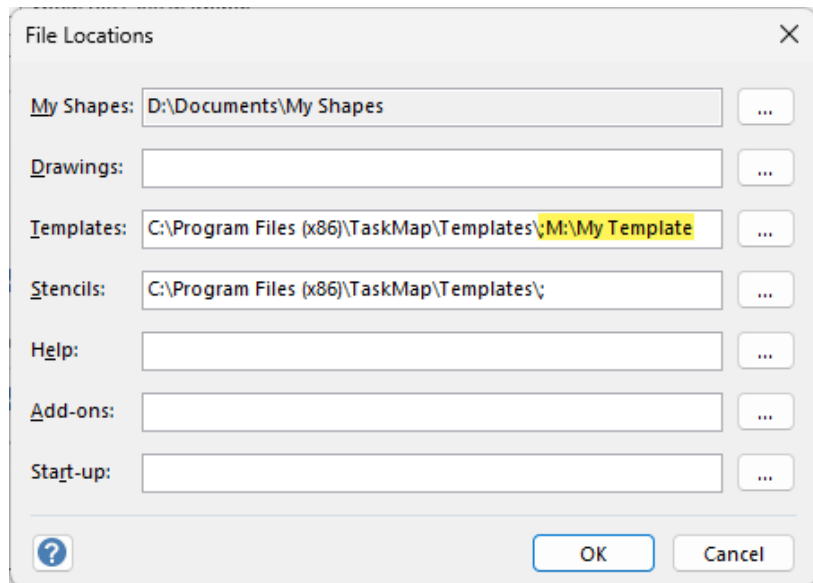
- Custom Role Names for use in Tasks
- Custom Frequencies for use in Tasks
- Logos or other graphics
- Copyright, company confidential or other text notices

The last two items are often located on a background page (refer to the TaskMap help text for more information about the use of background pages).

After creating a custom TaskMap template, you can copy it to the same folder that contains the four standard TaskMap templates; the default location is:

C:\Program Files (x86)\TaskMap\Templates\TaskMap\

If multiple people will share the custom TaskMap template you can also place it on a shared drive and tell Visio its location by setting the path name in the dialog shown on the right. To open this dialog, select *File/ Options*, then click the *Advanced* tab and the *File Paths* button. Place the path to the template in the text box following the word *Template*. NOTE: separate your path from any existing paths with a semicolon (;).



In many organizations it may be helpful to create multiple templates – one for each department or division, or one for each client or customer.

**NOTE: Every TaskMap template must include the word TaskMap in the file name. If you do not include “TaskMap” in the filename, the software will not recognize your template as a TaskMap template.**

# Appendix A

## Prepare Proposal for New Prospect

