Visio Tutorial

- Basics of Visio
- Visio template
- Visio is a varied diagram, chart and design package
- How to drag and drop shapes
- Join shapes with connectors (they stay attached no matter how you rearrange them.)
- Visio is more effectively than PowerPoint, Excel, or Photoshop, or illustrator.
- Shapes and pictures layout and format.
- Business Flow Chart
• Vision is well integrated with other MS products and can import excel data, which in turn creates charts
• This tutorial will cover the following topics:
  - Visio Lingo
  - Panning and Zooming
  - Resizing and repositioning of shapes, pictures and diagrams.
  - Use Dynamic Grid
  - Create Flowchart
  - Organization Chart Wizard with Existing Data
  - Rearranging Organization Chart
  - Auto-Connect and Quick Shapes
  - Auto Size
Home tab

- Click the **Home tab**

The Home tab is just what it sounds like: a place where you will spend a considerable amount of time. The Home tab contains the largest number of buttons by far, because Microsoft tried to fit as many of the most frequently used functions as possible onto this tab. There are sets of related buttons organized into groups called Clipboard, Font, Paragraph, Tools, Shape Styles, Arrange, and Editing.
Insert tab

- Click the **Insert tab**

to access the **Pages, Illustrations, Diagram Parts, Links, and Text** groups. Many of the functions available on this tab mirror the items on the Insert menu in Visio 2007 and earlier.
Design tab

- Click the **Design tab**

to change **Page Setup**, select **Themes** or **Variants**, create or edit page **Backgrounds**, and change page **Layout**.
Review tab

• Click the **Review tab**

for access to functions for **Proofing, Language, Comments,** and **Reports.**
View tab

• Click the **View tab**

As the name suggests, most of the buttons on this tab affect which Visio features are visible on the screen: The lone button in the **Views** group sets Visio into full-screen display mode.
View tab

• Click the View tab

As the name suggests, most of the buttons on this tab affect which Visio features are visible on the screen:

- The lone button in the Views group sets Visio into full-screen display mode.

NOTE

[ KEYBOARD SHORTCUT Press F5 to enter or exit full-screen view mode ]

- The Show group controls which drawing aids and task panes are visible.
View tab

- Use the **Zoom** buttons to change the magnification level in the drawing window.

- The **Visual Aids** group enables and disables various on screen drawing aids.

- Use the **Window** buttons to arrange or select among multiple windows when you have more than one drawing open.

- The Macros group provides access to the Visio macro programming window and to a list of pre-programmed add-ons that enhance the capabilities of Visio.
Minimizing and restoring the Visio ribbon

- **Minimize** - Because the ribbon takes a reasonable amount of space at the top of the Visio window, you may want to minimize it if you need more space for the drawing page. The key to doing so is a very small up arrow located in the lower-right corner of the ribbon.

- **Restoring** - To restore the ribbon to normal operation after it has been minimized, click the pushpin located in the lower-right corner of the ribbon.
**Shapes window**

- The **Shapes window** on the left contains one or more stencils, each represented by a header bar containing the name of the stencil. Depending on the number of open stencils in the Shapes window, a scroll bar might appear at the right of the headers.

- The **larger window** on the right is called the **drawing window** because it contains the drawing page. The drawing window is bounded on the top and left by rulers that display inches, millimeters, or whatever units you have selected (or your template has selected) for measuring page dimensions.

- With the cascading menus open, click **Basic Flowchart Shapes**. Visio opens the Basic Flowchart Shapes stencil. In a behavior change from Visio 2010, a check mark appears to the left of the stencil you selected, but the fly-out menus remain open, allowing you to select additional stencils from another stencil family.
Moving stencils

Click **Basic Flowchart Shapes** if it is not already the active stencil, and then drag a **Process** shape onto the drawing page. Drag a **Decision** shape onto a different part of the page. Drag a **Start/End** shape onto yet another part of the page. Drag a **Subprocess** and a **Document** onto the page.
Drag and Drop
Drag and Drop
Moving stencils

• Hold down the Ctrl + Shift keys (the cursor will change to a magnifying glass with a plus sign), and then drag a rectangle around two of the shapes on the drawing page.

• Release the mouse button and the keyboard keys. Visio sets the view in the drawing window to just the rectangle you outlined with the mouse. It displays what was selected.

• Press Ctrl + Shift + W to return to a view of the whole drawing page.
Resizing and Repositioning Shapes

- Resizing and repositioning shapes Once you’ve placed shapes onto the drawing page, you will probably need to move or resize some of them. The white squares that appear on a selected shape are referred to as selection handles, resize handles, or just handles, and allow you to alter the shape.

- Click **Width or Height** from the **Status bar**, then a pop up widow will display to **rotation handle**, **size** or **position shape**.
• **Page name tabs** display the name of each page and the active page name is displayed in a different color. Click any tab to change to that page. Right-click any page name tab to access page management functions including the new **Duplicate Page or Rename** functions.

• Click the **All button** to display a list of all pages in the diagram. The name of the active page is highlighted in the list.

• Click the **Insert Page** button to add a new page. The status bar contains a variety of indicators, buttons, and controls. The buttons and indicators on the left end of the status bar are context sensitive, so they will show different information depending on the state of the drawing.
Connecting shapes with lines

- Connecting shapes with lines Visio shapes are either one-dimensional (1-D) or two-dimensional (2-D). 1-D shapes act like lines with endpoints that can be attached to other shapes. 2-D shapes behave like polygons with edges and an interior. However, appearances can be deceiving, because some shapes that appear to be two-dimensional may actually be 1-D shapes in Visio.

1. On the **Home** tab, in the **Tools** group, click the **Line Tool**. Notice that the cursor changes to a plus sign with a diagonal line to the lower right.

2. Point near any of the five shapes toward the top of the page. Notice that dark squares appear on the edges and in the center of the shapes.
Connecting shapes with lines

The dark squares are connection points. They appear whenever you move near them with a 1-D shape or a tool like the Line Tool.

3. Move the cursor near a connection point and notice that a green square appears. The square indicates that you can click on it to glue one end of the line to the connection point. If you hold the pointer over the square without clicking, tooltip text will appear to confirm that you can glue to the connection point.
Connecting shapes with lines

4. Click the connection point on the right end of the rectangle, drag to the connection point on the left edge of the circle, and then release the mouse button.

You have drawn a line that is glued to the edges of the two shapes. Notice that the handle on the originating end of the glued line shows a green circle and the handle on the destination end shows a white circle with a green dot.

5. Draw another line above the rectangle but do not glue either end to a shape.

The line shows a white square on the originating end and a solid gray square on the destination end.
6. Use the Line Tool to draw a line from the connection point at the center of the octagon to the long rectangle below it. The long rectangle that you created with the drawing tool in a previous exercise does not contain any connection points. Consequently, you can only drop the end of the line onto the shape and can’t glue it. You can confirm which ends are glued by comparing the color and pattern at each end of this line with the handles in the previous two examples.
Connecting shapes with lines

7. On the Home tab, in the Tools group, click the Pointer Tool.

NOTE

[KEYBOARD SHORTCUT- Ctrl+ 1 to return to the Pointer]
Practice Visio Exercise
Practice Visio Exercise
Chart 1

◆ New file “Categories” to “Business” to “Organization Chart”

- Click Stencils “More Shapes” to “Flowchart” to “Notch – Organization Chart Shapes”
- Drag & drop “Executive Notch” to the drawing page
- Home tab from the Tools group click “Text” {type in the name }
- Change color – place arrow in the stencils and right click select “Format Shape” to “Solid fill” to “color” blue
- Drag & drop three (3) “Manager Notch” to the drawing page
- Connector- “Dotted-line report” to connect the stencils
- Repeat the above add needed.

- End of Exercise
Practice Visio Exercise

Chart 2

- Click Stencils “More Shapes” to “Flowchart” to “Basic Flowchart Shapes”
- Drag & drop “Process” to the drawing page
- Home tab from the Tools group click “Text” {type in the name }
- Change color – place arrow in the stencils and right click select “Format Shape” to “Solid fill” to “color” blue
# Practice Visio Exercise

## Chart 2

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Reports To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lillian LaCoste</td>
<td>President/CEO</td>
<td>Lillian LaCoste</td>
</tr>
<tr>
<td>Ellen Allen</td>
<td>R&amp;D Director</td>
<td>Lillian LaCoste</td>
</tr>
<tr>
<td>Naomi Svetlana</td>
<td>Manufacturing Director</td>
<td>Lillian LaCoste</td>
</tr>
<tr>
<td>Robin Kemp</td>
<td>Marketing Director</td>
<td>Lillian LaCoste</td>
</tr>
<tr>
<td>Michael Montoya</td>
<td>Sales Director</td>
<td>Lillian LaCoste</td>
</tr>
<tr>
<td>Abu Kisaka</td>
<td>Customer Service Director</td>
<td>Lillian LaCoste</td>
</tr>
<tr>
<td>Nicole de Lange</td>
<td>Sales Manager - NW</td>
<td>Michael Montoya</td>
</tr>
<tr>
<td>Rico Alvarez</td>
<td>Sales Manager - CA</td>
<td>Michael Montoya</td>
</tr>
<tr>
<td>Mark King</td>
<td>Sales Manager - SW</td>
<td>Michael Montoya</td>
</tr>
<tr>
<td>Edith Swanson</td>
<td>Sales Manager - MTN</td>
<td>Michael Montoya</td>
</tr>
<tr>
<td>Pietr Denfeld</td>
<td>Sales Manager - Central</td>
<td>Michael Montoya</td>
</tr>
<tr>
<td>Kelly Abrahms</td>
<td>Sales Manager - NE</td>
<td>Michael Montoya</td>
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<tr>
<td>Tom Thomas</td>
<td>Sales Manager - SE</td>
<td>Michael Montoya</td>
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<tr>
<td>Ernesto Gaddini</td>
<td>Marketing Manager - East</td>
<td>Robin Kemp</td>
</tr>
<tr>
<td>Regina Spencer</td>
<td>Marketing Manager - Central</td>
<td>Robin Kemp</td>
</tr>
<tr>
<td>Darryl Foster</td>
<td>Marketing Manager - West</td>
<td>Robin Kemp</td>
</tr>
</tbody>
</table>
Practice Visio Exercise

Chart 2

- “File” to “New” to “Categories” to “Business” to select “Organization Chart Wizard”

- Select “Create”
Practice Visio Exercise
Chart 2

- "File" to "New" to "Categories" to "Business" to select "Organization Chart Wizard"

- Select "Create"
Practice Visio Exercise
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