



Getting Started With Microsoft Visio

Visio 2003 is a drawing and diagramming program that can help the user change academic, business and technical ideas into a broad range of visual diagrams.

Creating a Template:

To begin a Visio diagram you first must open a template. A template opens one or more designs called stencils, which appear to the left of the drawing page. The stencils contain the shapes you will need to create your diagram.

Templates also include all the styles, settings, and tools you need to create a particular diagram type. For example, when you open a flowchart template, it opens a drawing page and stencils that contain appropriate flowchart shapes. The template also includes tools for creating flowcharts, such as a tool that numbers your shapes, and appropriate styles, such as arrowheads.

Opening a Template:

1. On the **File** menu, point to **New** and then click **Choose Drawing Type**.
2. In the **Choose Drawing Type** window, look under **Category** and click **Flowchart**.
3. Under **Template**, click **Basic Flowchart**. (See Figure 2 on page 5)
 - You can choose either **Basic Flowchart (Metric)** or **Basic Flowchart (US units)** depending on preference. (See Figure 3 on page 5)

Using Stencils and Shapes:

After you open a template, you'll see the Visio drawing environment, which includes menus, toolbars, stencils with shapes, the drawing page, and a task pane to the right of the drawing page. You create your drawing on the drawing page, which represents the printed page and includes a grid to help position shapes.

You drag and drop shapes from stencils onto the drawing page to create your diagram. The shapes on stencils are designed specifically for the particular drawing type.

You can also select shapes that have particular behaviors associated with them. For instance, you can:

- Add text that moves with a shape or doors and windows that move with walls.
- Drag a control handle on a chair shape to rotate the chair.
- Specify the number of slices in a pie chart.

Adding shapes to a template:

1. From the **Basic Flowchart Shapes** stencil in the **Shapes** window, drag and drop a **Process** shape onto the drawing page. (See Figure 4 on page 5)
2. Drag and drop another **Process** shape, placing it below the first **Process** shape.
3. Drag and drop a **Decision** shape to the drawing page, placing it below the second **Process** shape.
4. Drag and drop a **Predefined** process shape, placing it to the right of the **Decision** shape.
5. Drag and drop another **Process** shape, placing it below the **Decision** shape.
6. Drag and drop a **Terminator** shape, placing it below the last **Process** shape.



When you drag a flowchart shape onto the drawing page, you can use the dynamic grid (dashed lines that appear when you drag a shape onto the page) to quickly align the shape with the others on the drawing page. You can also use the grid on the drawing page to align your shapes. Neither grid appears when you print a diagram.

Deleting Shapes:

Deleting an unwanted shape on your drawing page is simple in Visio, simply click the shape and then press the **Delete** key.

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Opening a Stencil:

1. On the **File** menu, point to **Shapes**, point to **Flowchart**, and then click **Miscellaneous Flowchart Shapes**.
2. From the **Miscellaneous Flowchart Shapes stencil** in the **Shapes** window, drag the **Process** shape onto the drawing page and place it to the right of the first **Process** shape. The **Process** shape is a *circle*.
3. In the **Shapes** window, click the **Basic Flowchart Shapes stencil title bar** to show its shapes again.



You can use the Search for Shapes feature to find a specific shape on your computer or on the Web. To use this feature, in the Shapes window, enter the shape name or a keyword in the Search for Shapes box. After you find the shape you want, drag and drop it from the Shapes window onto the drawing page.

Moving and resizing shapes:

Moving a shape is easy in Visio. Simply click any shape to select it, and then drag it to the desired new location. Selection handles will appear when you click on the shape. If the shapes in your diagram are too small to work with, you'll want to zoom in closer. If you're working with a large diagram such as a floor plan you may want to zoom in or out to check a specific view or the overall view.

Zooming:

1. To zoom in on the shapes in your diagram, click the **Pointer** tool, and then hold down the **[CTRL]** and **[SHIFT]** keys simultaneously while you **drag** a selection rectangle around the shapes.
2. The **Pointer** changes to a **magnifying** tool, which tells you Visio is ready to zoom in on the shapes.
3. To zoom out to check the overall look of your diagram, **center** the drawing page in the window, and press the **[CTRL]** and **[W]** keys simultaneously.



You can also zoom in and out of the drawing page using the Zoom box on the toolbar and the Pan & Zoom window. To open the Pan & Zoom window, on the View menu, click Pan & Zoom Window.

Moving a shape:

1. With the **Pointer** tool, select the **Process** shape by clicking on it. The **Process** shape is a *circle*.

2. Place the **Pointer** tool over the **center** of the **Process** shape.
3. A **four-headed arrow** appears under the **Pointer**, which tells you that the shape is ready to be moved.
4. Drag and drop the **Process** shape next to the second **Process** shape.
 - If you resize the shape by mistake, just undo your last action by clicking **Edit** and then **Undo**.



You can click a shape, and then press an Arrow key on your keyboard to move it. To move the shape in smaller increments, hold down the **[SHIFT]** key while you press an **[Arrow]** key.

Moving multiple shapes:

To move several shapes at a time, you must first select all the shapes you want to move. To select multiple shapes, please do the following:

1. With the **Pointer** tool, click a **blank** area of the drawing page above and to the left of the top **Process** shape and then drag to create a **black selection rectangle** around all of the shapes, except for the last **Terminator** shape.
 - Another method to achieve the same results is to hold down the **[SHIFT]** key while you click **each** shape.
2. Place the **Pointer** tool over the **center** of any of the selected shapes.
3. A **four-headed arrow** appears under the pointer, which tells you that the shapes are ready to be moved.
4. Drag the shapes down a little bit to make room for your diagram title.
 - All the selected shapes move at once.



You can also select multiple shapes by clicking the arrow next to the Pointer tool, and then using the Area Select or Lasso Select tools or Multiple Select. If you click Multiple Select and then select shapes, make sure you click Multiple Select again when you're finished to turn off multiple selection.

Resizing a shape:

You can resize a shape by dragging its corner, side, or bottom selection handles, which appear as small, green square boxes.

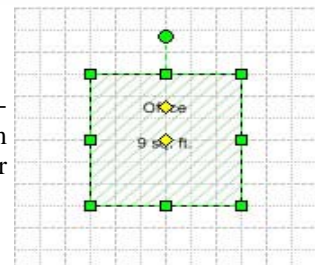


Figure 1. Section handles.

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Resizing a shape continued....

1. With the Pointer tool , click the **Process** shape. The **Process** shape is a *circle*.
2. Place the Pointer tool over a corner selection handle.
3. The pointer changes to a *two-headed arrow*, which indicates that you can resize the shape.
4. **Drag** the selection handle *inward* by clicking and holding down the *right* mouse button. By dragging it inward you will decrease the size of the shape. You can also **drag** the selection handle *outward* to increase its size.

Adding to text:

You can add text to shapes by clicking a shape and typing. Visio will automatically zoom in so you can see the text as you type. To add text to a shape, please do the following:

1. Click the first **Process** shape on the drawing page, and then type **A**.
 - You could also as an alternate option click the **Text** tool, click the *shape* and then type your text.
2. Click the second **Process** shape and then type **B**.
3. Click the **Decision** shape and then type **C**.
4. Click the **Predefined Process** shape and then type **1**.
5. Click the **Terminator** shape and then type **2**.
6. Click a *blank* area of the drawing page or press the [ESC] key to exit the text mode.

Deleting Text from a shape:

1. *Double*-click the shape.
2. With the text highlighted, press the [Delete] key on your keyboard.
 - For an alternate method, click the **Text** tool, click the *shape*, *highlight* the text you want to delete and then press the [Delete] key.
 - If you delete the shape by mistake, click **Undo**.

Add independent text:

You can also add text to the drawing page that's not associated with any shape, such as a title or list. This type of text is called *independent* text or a text block.

1. To add independent text, click the **Text** tool .
2. *Single*-click the *top* of the page and then type **ABC12**.

Delete independent text:

1. Click the **Pointer** tool.
2. *Single*-click the text and then press the [Delete] key.


Moving independent text:

You can move independent text as you move any other shape, since independent text is a shape with no border or color. To move independent text, please do the following:


1. With the Pointer tool , click the *text* you can to move.
2. Place the Pointer tool over the *center* of the text.
3. A *four-headed arrow* will appear beneath the Pointer, which indicates that the text can be moved.
4. **Drag** the text to center it above your diagram.
5. Press the [CTRL] and [W] keys simultaneously to zoom out and check the overall look of your diagram.

Formatting text:

You can format text to be bold or italicized in Visio in a similar way as you would format text in a Microsoft Word document. You can use buttons on the toolbar or options in the Text dialog box, which is located on the Format menu. To format your text, please do the following:

1. To make text formatting buttons visible, *right*-click the toolbar and then click **Format Text** on the shortcut menu.
2. Click somewhere above and to the left of the top **Process** shape and the diagram title.
3. **Drag a black selection rectangle** that encloses all of the shapes.
 - Everything within the selection rectangle is now selected.
4. To increase the size of the text to 14 points, click the **Increase Font Size**  button on the Format Text toolbar *four* times.

Connecting shapes:

1. Hold down the [CTRL] and [SHIFT] keys simultaneously on your keyboard to zoom in on two shapes on your drawing page, while you drag a selection rectangle around the shapes you want to connect. Then do the following:
2. Click the **Connector**  tool.
3. Place the **Connector** tool over the *connection point* on the bottom of the first **Process** shape.
 - The connection point will be denoted by a *red* box.
4. Drag the **Connector** tool from the connection point on the first shape to the connection point on the other shape.
5. The connector endpoints turn *red* when the shapes are connected. If one end-point is still green, you cannot successfully connect them.
6. To zoom out, press the [CTRL] and [W] keys simultaneously.

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Connect shapes with a connector from a stencil:

1. From the Basic Flowchart Shapes stencil in the Shapes window, drag the **Line-curve** connector and position it so the endpoint of the plain end of the connector connects to the connection point on the left side of the first **Process** shape.
2. The **Line-curve** connector endpoint will change to *red* when it is successfully connected to the **Process** shape. The other endpoint will remain green because you have not connected it to a shape.
3. Drag the unconnected endpoint of the arrowhead end of the **Line-curve** connector onto the connection point on the left side of the **Decision** shape.
 - Both connector endpoints will turn red when the shapes are connected.

Add text to connectors:

1. With the Pointer tool, click the *connector* between the **Decision** and **Predefined** process shapes and then type **A**.
 - Visio will automatically zoom in so you can see the text as you type.
2. Click the *connector* between the **Decision** and **Terminator** shapes and then type **B**.

Add a shape between connected shapes:

1. With the Pointer tool, drag the **Process** shape onto the connector between the **Predefined** process shape and the **Terminator** shape.
2. Visio will connect the **Predefined** process shape to the **Process** shape and the **Process** shape to the **Terminator** shape.

Format 1-D shapes:

1. To change the line pattern of the **Line-curve** connector shape, click the **Line-curve**, click the **Line Pattern** button on the toolbar and then click on a *dashed line*.
 - You can also click **Line** on the Format menu to change the color, thickness, pattern, or ends.

Format 2-D shapes:

1. To change the color of the **Decision** shape, click it, click the **Fill Color** button on the toolbar and then click **Bright Green**.
 - You can also click **Fill** on the Format menu to change the fill color or pattern.
2. To change the line color of the **Predefined** process shape, click it, click the **Line Color** button on the toolbar

and then click **Red**.

- You can also click **Line** on the Format menu to change the line color, thickness, or pattern.

Using a control handle to change a shape:

Some shapes have control handles you can use to change a shape's appearance. For example, a control handle might rotate a shape or change the location of the text associated with the shape. To use a control handle to change a shape, please do the following:

1. To decrease the distance between the inside lines of the **Predefined** process shape, with the Pointer tool, drag the control handle on the shape *inward*.
 - To find out what a control handle does, pause the pointer over the control handle to see a tip.
2. To widen the curve of the **Line-curve** connector shape, drag the control handle on the shape to the *left*.

Add a hyperlink to a shape:

1. With the Pointer tool, click the top **Process** shape in your flowchart.
2. On the Insert menu, click **Hyperlinks**.
3. Type <http://www.nwmissouri.edu> for an address and then click **OK**.
4. *Right-click* the top **Process** shape, and then click <http://www.nwmissouri.edu> on the shortcut menu to open your default web browser (should be **Internet Explorer** on a university computer) and go to the Northwest homepage.
 - When you pause the Pointer tool over the **Process** shape, a globe will now appear beneath the pointer, which tells you the shape contains a hyperlink.

Save a diagram as a web page:

1. Click **Save as Web Page**, which is located on the **File** menu.
2. In the File name box, type **WWWFlowchart**.
3. Click **Save** to open your default web browser and view the web page you have just created.

Insert a diagram or shape into a Word 2003 document:

To add an entire Visio diagram or just a few shapes to a Word 2003 document is a simple process and easily be done by copying and pasting the diagram or shapes. To add a diagram or shape to a Word 2003 document, please do the following:

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Insert a diagram or shape into a Word 2003 document continued...

1. To select all the shapes in your diagram, click **Select All** on the Edit menu.
2. To copy those shapes, on the Edit menu, click Copy.
 - You can also click a **blank area** of the drawing page to make sure nothing is selected and then on the Edit menu, click **Copy Drawing**.
3. Open your **Word 2003** document.
4. Click **Paste** on the Edit menu of your Word document.
 - Word pastes the diagram into the document in the location you clicked.

To add a shape or shapes into a Word 2003 document from Visio 2003, select the shape you want to copy or select multiple shapes by holding down the [SHIFT] key while you click on each shape. Then, on the Edit menu, click Copy. On the Edit menu within Word, click Paste.

Change a Visio diagram within Word:

1. In the Word 2003 document, **double-click** the Visio diagram.
 - Visio opens within Word and you can work with the diagram using Visio toolbars and menus.
2. To exit Visio and return to the Word document, click **outside** the diagram, anywhere within the Word document.
 - Visio closes, and Word becomes the active program again.
 - The Visio document, which contains your original diagram, will remain unchanged. The changes you made within Word will apply only to the Word version.

Saving a diagram in Visio:

After you are done working with a diagram in Visio, you will need to save it to preserve your work. To save a document, please do the following:

1. Click **Save As** on the File menu.
2. In the File name box, type **FLOWCHART1** and then click **Save**.

Previewing and printing a diagram:

1. Click **Print Preview** on the File menu.
 - You can also click the **Print Preview** button .

2. Click **Print** on the File menu.
 - If you only want to print the **current** drawing page, you can click the **Print Page** button instead.
3. In the Print dialog box, click **OK**.
4. To exit print preview, click **Close** on the toolbar.

Basic Flowchart templates and shapes:

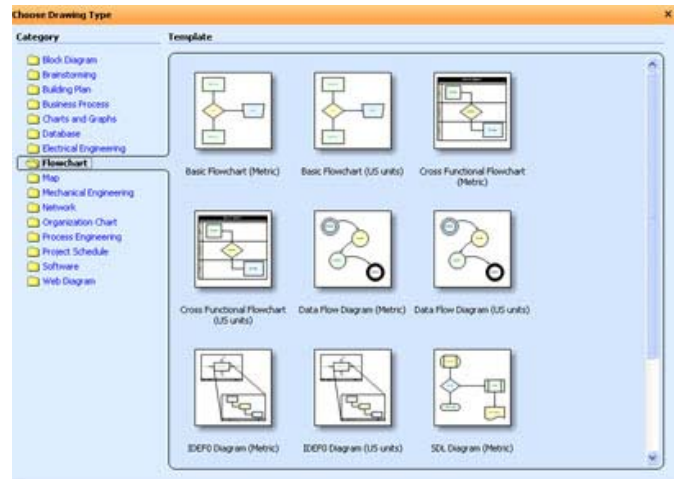


Figure 2. Flowchart Templates.

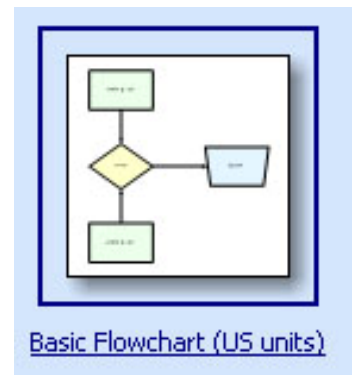
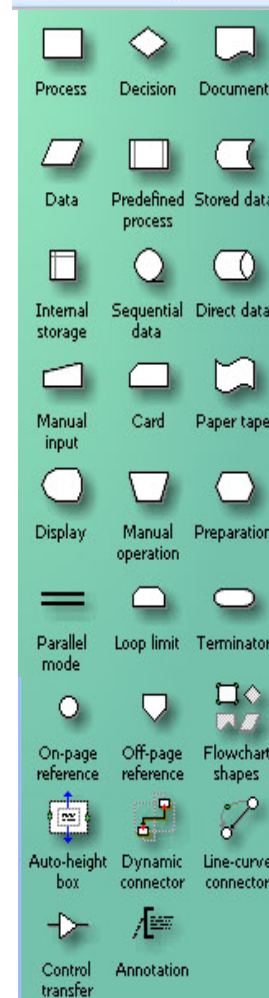


Figure 3. Click to select a template.

Figure 4. Basic Flowchart shapes.