

Microsoft Visio XP

Manual - Foundation Level



SAMPLE

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SAMPLE

Using Microsoft Visio 2002

When you have completed this learning module you will have seen how to:

- Use Microsoft Visio 2002
- Use File Types
- Use the Microsoft Web Site
- Work in the Visio Window
- Use the Drawing Page
- Use Stencils
- Use the Template Preview
- Use the Task Pane
- Show a Toolbar
- Hide a Toolbar
- Move a Toolbar
- Use the Standard Toolbar
- Use the Formatting Toolbar
- Use the Ask a Question Box
- Use Microsoft Visio Help
- Take the Getting Started Tour

What is Visio?

Using Microsoft Visio 2002

- **Visio 2002** is the diagramming solution offered by Microsoft Office. Business professionals can communicate ideas and processes using a variety of diagrams.

Note: Visio 2002 is available in **Standard** and **Professional** editions. This training manual covers **Visio Standard**.

Using File Types

- By default, Visio 2002 saves files as **drawings**, with the **.vsd** extension.

Visio 2002 allows you to change an existing stencil or create a new stencil. **Stencils** are saved with the **.vss** extension.

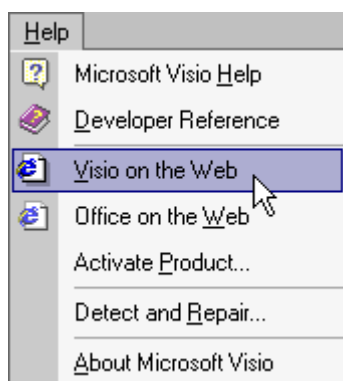
Saving a drawing as a template allows you to use a drawing as a model from which to base future drawings. **Templates** are saved with the **.vst** extension.

Note: Drawings, stencils, and templates can also be saved in **XML** format.

Using the Microsoft Web Site

- The **Microsoft Office** Web site provides Visio users with support, downloads, tools, and product documentation. You can visit the **Visio** Web site at <http://www.microsoft.com/office/visio/>

OR from the main menu, select **Help > Visio on the Web**:

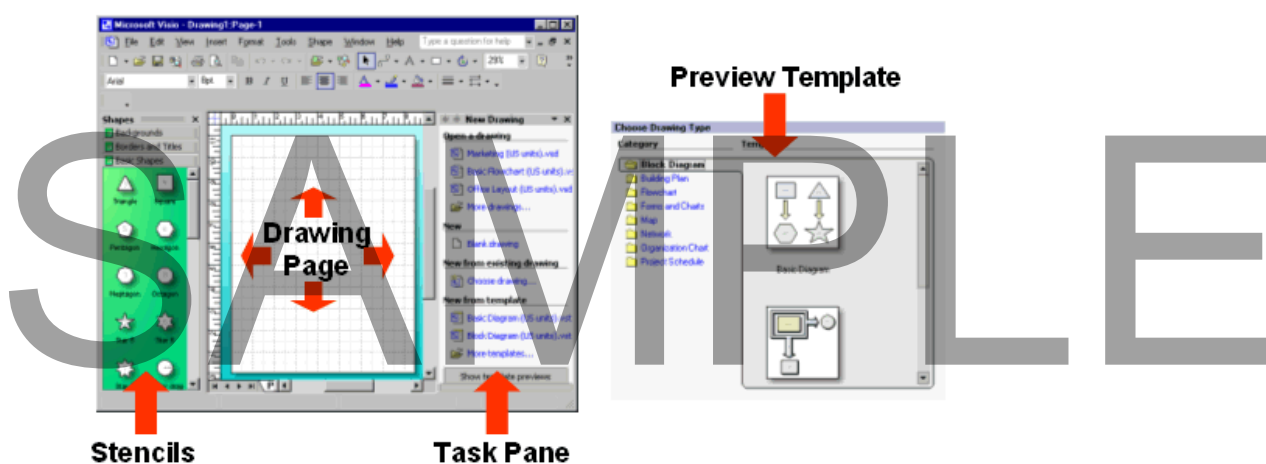


Getting to Know the Visio Environment

Working in the Visio Window

The Visio window can be divided into four distinct areas:

- The **Drawing Page** is the main area where all work is performed.
- **Stencils** are panels that appear to the left of the drawing page.
- The **Template Preview** covers the drawing page when displayed.
- The **Task Pane** is the panel to the right of the drawing page:



Using the Drawing Page

- The **Drawing Page** is the main area where drawings and diagrams are created. The drawing page displays the printable drawing area.

Using Stencils

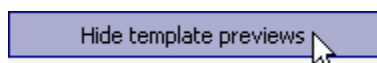
- Stencils related to a drawing type open automatically when a new drawing is created using a template. Visio 2002 offers a variety of stencils containing different shapes that can be used.

Using the Template Preview

- By default, the **Template Preview** is displayed when you open Visio 2002. The **Template Preview** displays various categories of drawing types and their corresponding templates.
- When displayed, the **Template Preview** covers the drawing page and stencil areas.

To display or hide the Template Preview:

- Click the Hide template previews or Show template previews bar on the New Drawing Task Pane:



Using the Task Pane

- The **Task Pane** lists common tasks you may want to perform in Visio. Task Pane titles are descriptive to help you quickly locate the task you want.
- Task Panes available in Visio 2002 include **New Drawing**, **Search**, and **Insert Clip Art**.
- By default, the **New Drawing** Task Pane (with the **Template Preview**) is displayed when you open Microsoft Visio 2002.

To display the Task Pane (if it has been closed):

- From the main menu, select **View > Task Pane** (you will see a check mark beside it when the Task Pane is visible).

Note: The most recently used Task Pane will be displayed.

To display other Task Panes:

- Click the **Other Task Panes** down arrow and select another Task Pane from the drop-down menu:



To switch between the most recently used Task Panes:

- Click the **Back** or **Forward** arrows in the upper-left corner of the Task Pane.

To close a Task Pane:

- Click the **Close** button to the right of the **Other Task Panes** down arrow.

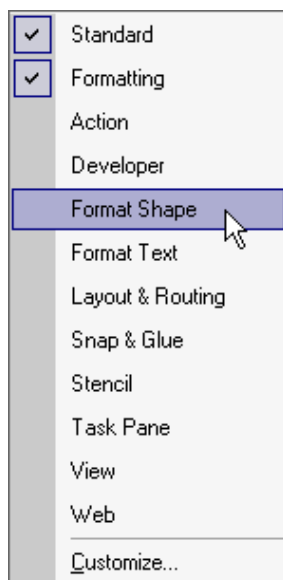
Getting to Know Visio Toolbars

About Visio Toolbars

- Visio has twelve (12) toolbars including the **Task Pane**. By default, the **Standard** and **Formatting** toolbars are displayed. The remaining toolbars are used for specific functionality in Visio.

Showing a Toolbar

- From the main menu, select **View > Toolbars**.
- Select the toolbar you want to display (you will see a check mark beside the toolbar when it is visible):



Hiding a Toolbar

- From the main menu, select **View > Toolbars**.
- Select the toolbar you want to hide (you will **not** see a check mark beside a toolbar when it is hidden).

Moving a Toolbar


- Place your mouse over the vertical lines at the left side of the toolbar. Your mouse cursor must change to the **Move** cursor:



- Click and drag the toolbar to its new destination.


Using the Standard Toolbar


- The **Standard** toolbar provides quick access to commonly used actions. Each action is represented by a button. When you move your mouse pointer over a button, it is highlighted in blue and a descriptive tool tip appears. Click the action/button you want to use.
- The following are buttons on the **Standard** toolbar:


 **New** – Create a new blank drawing or a new drawing based on a template, using the drop-down menu.


 **Open** – Open a drawing.


 **Save** – Save a drawing.


 **E-mail** – E-mail a drawing.


 **Search** – Display the Basic Search Task Pane.

 **Print Page** – Print a drawing.

 **Print Preview** – Preview a drawing.


 **Spelling** – Check spelling.


 **Cut** – Cut selected items.

 **Copy Drawing** – Copy selected items.

 **Paste** – Paste the last item cut or copied.

 **Format Painter** – Copy formatting.


 **Undo** – Undo the last action or multiple actions using the drop-down menu.


 **Redo** – Redo the last undo action or multiple undo actions using the drop-down menu.


 **Open Stencil** – Open a stencil using the drop-down menu.


 **Find Shape** – Search for shapes in existing stencils and on the Web.

 **Pointer Tool** – Select shapes.

 **Connector Tool** – Select the Connector Tool, Connection Point Tool, or Stamp Tool using the drop-down menu.


 **Text Tool** – Select the Text Tool or Text Block Tool using the drop-down menu.

 **Rectangle Tool** – Select the Rectangle Tool or Ellipse Tool using the drop-down menu.

 **Line Tool** – Select the Line Tool, Arc Tool, Freeform Tool, or Pencil Tool using the drop-down menu.

 **Rotation Tools** – Select the Rotation Tool or Crop Tool using the drop-down menu.

 **Zoom** – Zoom in or out of a drawing using the drop-down menu.


 **Microsoft Visio Help** – Display Microsoft Visio Help.

 **Toolbar Options** – Customize the Standard toolbar using the drop-down menu.

Using the Formatting Toolbar


- The **Formatting** toolbar provides quick access to commonly used formatting actions. Each action is represented by a button. When you move your mouse pointer over a button, it is highlighted in blue and a descriptive tool tip appears. Click the formatting action/button you want to use.
- The following are buttons on the **Formatting** toolbar:

 **Style** – Apply a style to selected text.

 **Font** – Select a font type from the drop-down menu.

 **Font Size** – Select a font size from the drop-down menu.

 **B Bold** – Apply bold style to selected text.

 **Italic** – Apply italic style to selected text.

 **Underline** – Apply underline style to selected text.

 **Align Left** – Align text to the left.

 **Align Center** – Align text to the center.


 **Align Right** – Align text to the right.


 **Text Color** – Change the font color using the drop-down menu.

 **Line Color** – Apply a line color using the drop-down menu.

 **Fill Color** – Apply a fill color using the drop-down menu.

 **Line Weight** – Change the line weight using the drop-down menu.

 **Line Pattern** – Change the line pattern using the drop-down menu.

 **Line Ends** – Change line ends using the drop-down menu.

 **Toolbar Options** – Customize the Formatting toolbar using the drop-down menu.

Getting Help

Using the Ask a Question Box

- The **Ask a Question Box** allows you to type in key words relevant to the topic with which you would like help. It is located in the main menu at the top right of your screen:

 Type a question for help

To use the Ask a Question Box:

- Type in a question using natural language.
- Press the **Enter** key on your keyboard.

Using Microsoft Visio Help

- **Microsoft Visio Help** offers help using a Help window divided into three tabbed sections: **Contents**, **Answer Wizard**, and **Index**.
- The **Contents** section offers a list of topics and sub-topics. Double-click a topic to open it.
- The **Answer Wizard** section searches for answers to any question you type.
- The **Index** section displays index entries which can be searched.

To use Microsoft Visio Help:

- From the main menu, select **Help > Microsoft Visio Help**

OR click the **Microsoft Visio Help** button on the **Standard** toolbar:

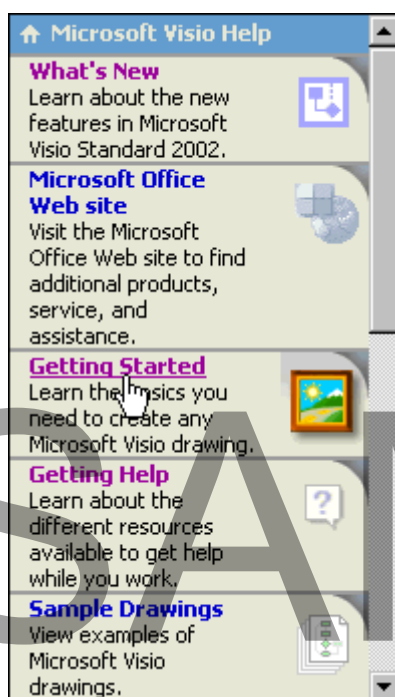


Taking the Getting Started Tour

- The **Getting Started** tour is useful for learning the basics of Visio 2002.

To take the Getting Started tour:

- From the main menu, select **Help > Microsoft Visio Help**.
- Click the Getting Started link in the Microsoft Visio Help pane:



Review Questions

How would you:

- Use Microsoft Visio 2002?

- Use File Types?
- Use the Microsoft Web Site?
- Work in the Visio Window?
- Use the Drawing Page?
- Use Stencils?
- Use the Template Preview?
- Use the Task Pane?
- Show a Toolbar?
- Hide a Toolbar?
- Move a Toolbar?
- Use the Standard Toolbar?
- Use the Formatting Toolbar?
- Use the Ask a Question Box?
- Use Microsoft Visio Help?
- Take the Getting Started Tour?

SAMPLE

Working with Drawings

When you have completed this learning module you will have seen how to:

- Display Drawing Categories and Templates
- Browse Category Templates
- Browse Sample Drawings
- Display the New Drawing Task Pane
- Create a New Blank Drawing
- Create a Drawing from an Existing Drawing
- Create a Drawing from a Template
- Open an Existing Drawing
- Display the Basic Search Task Pane
- Search for Files
- Customize Searches
- Use Search Results
- Save a Drawing
- Change Drawing Properties
- Save a Drawing as a Web Page
- Close a Drawing

Exploring Visio

Displaying Drawing Categories and Templates

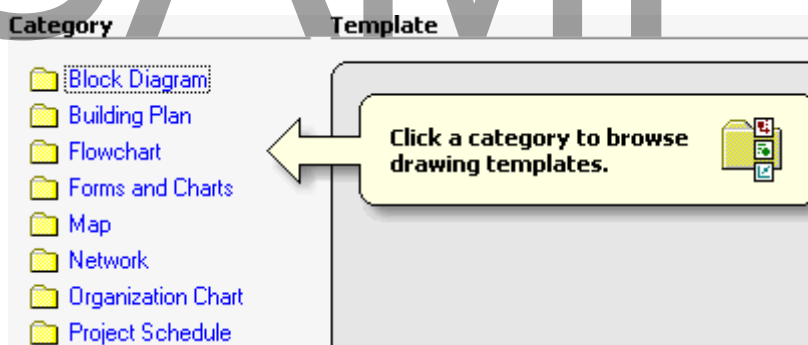
- The **Template Preview** is divided into drawing categories and templates. Although the Template Preview is displayed by default when Visio 2002 is opened, you may need to access templates at a later stage.

To display drawing categories and templates:

- From the main menu, select **File > New > Choose Drawing Type**.

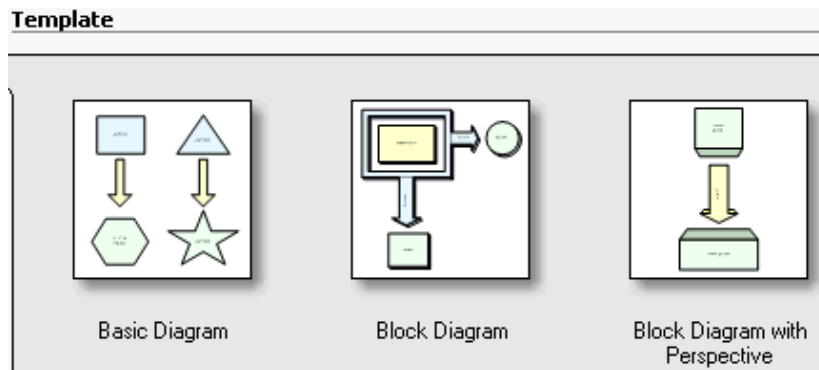
Browsing Category Templates

- The first time you open Visio 2002, you will be prompted to click a category to browse drawing templates:



To browse a category of templates:

- Click on the category. This displays corresponding templates in the **Template** area:



Browsing Sample Drawings

- Sample drawings are useful for getting an idea of what each drawing template can communicate:

To browse sample drawings:

- From the main menu, select **File > New > Browse Sample Drawings**.
- Select the sample drawing you want to view.
- Click **Open**.

Using the New Drawing Task Pane

About the New Drawing Task Pane

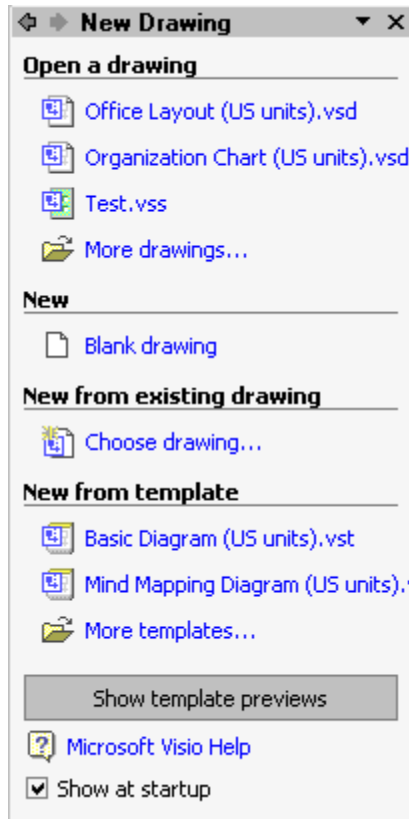
- The **New Drawing** Task Pane provides a central point to create a new drawing or open an existing one.
- By default, the **New Drawing** Task Pane opens with the **Template Preview** when you open Microsoft Visio.

Note: The **New Drawing** Task Pane includes a bar to show or hide the **Template Preview**.

SAMPLE

Displaying the New Drawing Task Pane

- From the main menu, select **File > New > Choose Drawing Type**:



Creating or Opening a Drawing

Creating a New Blank Drawing

- Click the **Blank drawing** link on the **New Drawing** Task Pane in the **New** area:



OR click the **New** button on the **Standard** toolbar

OR from the main menu, select **File > New > New Drawing**

OR press the **Ctrl+N** key combination.

Creating a Drawing from an Existing Drawing

- Click the **Choose drawing** link on the **New Drawing** Task Pane in the **New from existing drawing** area:

New from existing drawing



- This opens the **New from Existing Drawing** dialog box.
- Locate and select the file you want to base your new drawing on.
- Click Create New.

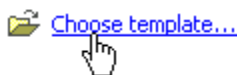
Creating a Drawing from a Template

- Creating a drawing from a template can be performed from the **New Drawing** Task Pane or from the **Template Preview**.
- Templates are discussed in more detail in the next chapter.

To create a drawing from a template using the New Drawing Task Pane:

- Click the **Choose template** link on the **New Drawing** Task Pane in the **New from template** area:

New from template



- This opens the **Browse Templates** dialog box.
- Locate and select the template you want to base your new drawing on.
- Click **Open**.

Note: If you have previously opened a template, the template will be listed on the **New Drawing** Task Pane. If the template is not listed, click **More templates**:

New from template



To create a drawing from a template using the Template Preview:

- If the template preview is not displayed, click **Show template previews** on the **New Drawing** Task Pane:



- Click a category to view templates.
- Click the template you want to base your new drawing on.

Opening an Existing Drawing

- Click the **Choose drawing** link on the **New Drawing** Task Pane in the **Open a drawing** area:

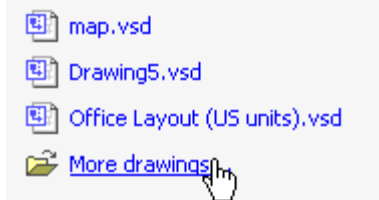
Open a drawing



- This opens the **Open** dialog box.
- Locate and select the drawing you want to open.
- Click **Open**.

Note: If you have previously opened a drawing, the drawing will be listed on the **New Drawing** Task Pane. If the drawing is not listed, click **More drawings**.

Open a drawing



OR

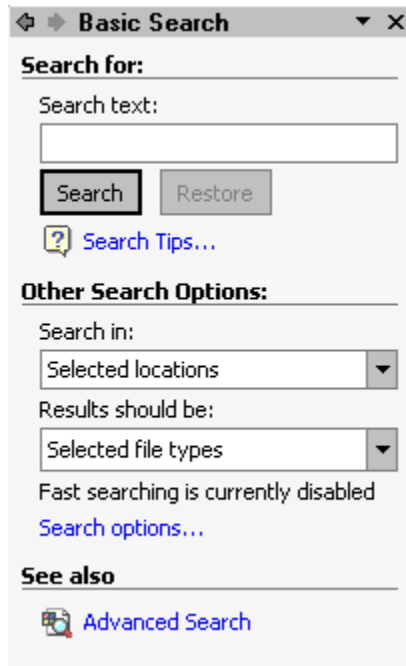
- Click the **Open** button on the **Standard** toolbar. This opens the **Open** dialog box.
- Locate and select the drawing you want to open.
- Click **Open**.

Using the Basic Search Task Pane

About the Basic Search Task Pane

- From the **Basic Search** Task Pane, you can search for files on your computer based on a file name or text in a file:

SAMPLE



Displaying the Basic Search Task Pane

- Click the **Search** button on the **Standard** toolbar:



OR from the main menu, select **File > Search**.

Searching for Files

- Enter the text to search for in the **Search text** box.
- Click **Search**.

Customizing Searches

- Select a location from the **Search in** drop-down menu.
- Select a file type from the **Results should be** drop-down menu.

Note: You can customize your search further by using **Advanced Search** and speed up the search process by installing **Fast Searching**.

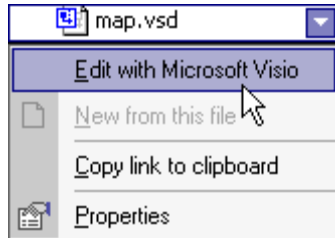
Using Search Results

To open a file from the search results:

- Click on a file in the **Search Results** list.

OR

- Click the down arrow next to the file in the **Search Results** list.
- Select Edit with Microsoft Visio:



Managing Drawings

Saving a Drawing

- From the main menu, select **File > Save**

OR press the **Ctrl+S** key combination

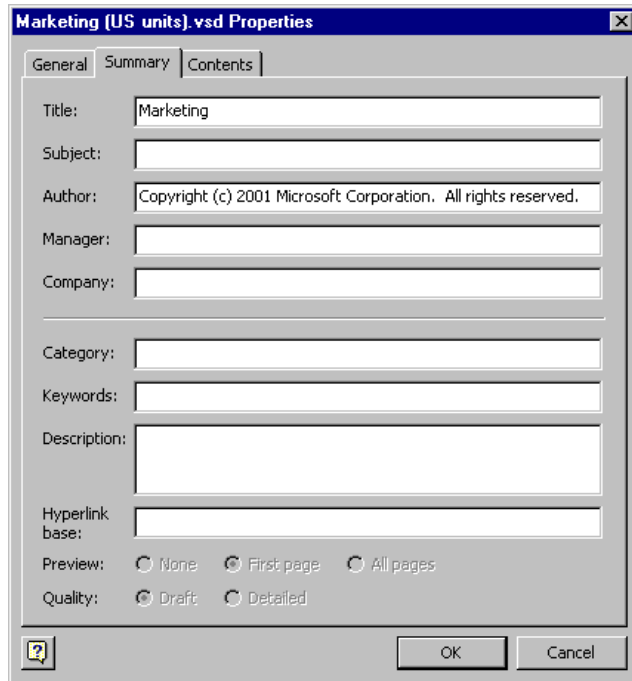
OR click the **Save** button on the **Standard** toolbar:



Note: If you are saving a new file, the **Save As** dialog box will open. Enter a file name in the **File name** text box and click **Save**.

- This opens a **Properties** dialog box:

SAMPLE



Note: The **Properties** dialog box only appears the first time you save a Visio drawing. Information entered in the **Properties** dialog box appears in the **Open** dialog box to help identify the file when you are searching for and opening a Visio drawing.

- Enter the drawing properties you want.
- Click **OK**.

Changing Drawing Properties

- Accessing drawing properties is useful if you want to change the information entered in the **Properties** dialog box the first time the Visio drawing was saved.

To change drawing properties:

- From the main menu, select **File > Properties**.
- Enter the drawing properties you want.
- Click **OK**.

Saving a Drawing as a Web Page

- From the main menu, select **File > Save as Web Page**. This opens the **Save As** dialog box.
- Enter a file name in the **File name** text box.

Note: To change the title of the Web page (the name that appears in the Web page title bar), click **Change Title**. Enter a new name and click **OK**.

- Click **Save**.

Closing a Drawing

- From the main menu, select **File > Close**.

Note: You will be prompted to save the drawing if there are unsaved changes.

Review Questions

How would you:

- Display Drawing Categories and Templates?
- Browse Category Templates?
- Browse Sample Drawings?
- Display the New Drawing Task Pane?
- Create a New Blank Drawing?
- Create a Drawing from an Existing Drawing?
- Create a Drawing from a Template?
- Open an Existing Drawing?
- Display the Basic Search Task Pane?
- Search for Files?
- Customize Searches?
- Use Search Results?
- Save a Drawing?
- Change Drawing Properties?
- Save a Drawing as a Web Page?
- Close a Drawing?

SAMPLE

Choosing a Drawing Type

When you have completed this learning module you will have seen how to:

- Create a Basic Diagram
- Create a Block Diagram
- Create a Block Diagram with Perspective
- Create an Office Layout
- Create an Audit Diagram
- Create a Basic Flowchart
- Create a Cause and Effect Diagram
- Create a Cross-Functional Flowchart
- Create a Mind Mapping Diagram
- Create a TQM Diagram
- Create a Work Flow Diagram
- Create Charts and Graphs
- Create a Form Design
- Create Marketing Charts and Diagrams
- Create a Directional Map
- Create a Directional Map 3D
- Create a Basic Network
- Create an Organization Chart
- Use the Organization Chart Wizard
- Create a Calendar
- Create a Gantt Chart
- Create a PERT Chart
- Create a Timeline

Working with Templates

About Visio 2002 Templates

- A Visio 2002 template is a collection of items needed to create a specific drawing type.

Items specific to a template include **Menus**, **Stencils**, **Shapes**, and the **Drawing Page**.

Template items change according to the template chosen.

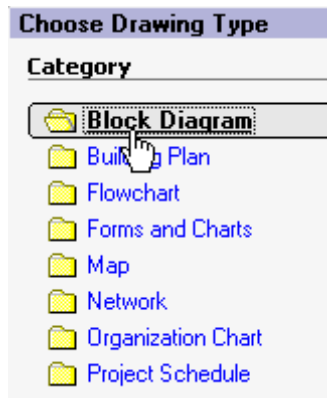
Working with Block Diagram Templates

Creating a Basic Diagram

- A **Basic Diagram** offers simple 2-D geometric shapes and directional lines useful for drawing a plan or communications process, or mapping out a concept.

To create a Basic Diagram:

- With the **Preview Template** open, click **Block Diagram** in the **Category** list:



- Click **Basic Diagram** in the Template list

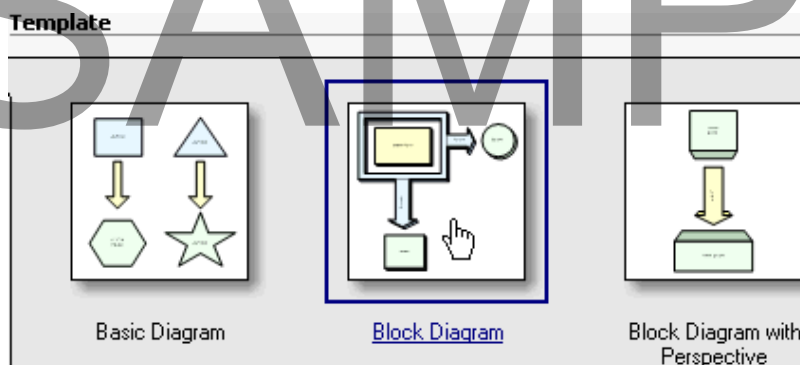
OR from the main menu, select **File > New > Block Diagram > Basic Diagram**.

Creating a Block Diagram

- A **Block Diagram** offers 2-D and 3-D geometric shapes and directional lines useful for drawing a plan or communications process, mapping out a concept, representing hierarchies with tree shapes, and creating onion diagrams with partial layer shapes.

To create a Block Diagram:

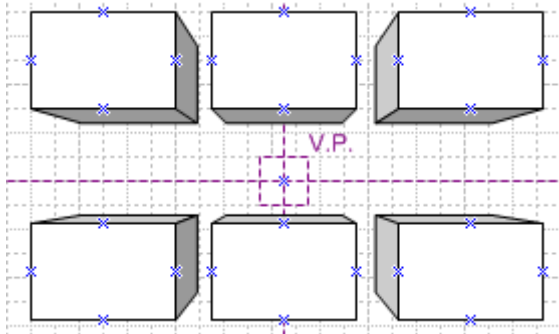
- With the Preview Template open, click Block Diagram in the Category list.
- Click **Block Diagram** in the Template list:



OR from the main menu, select **File > New > Block Diagram > Block Diagram**.

Creating a Block Diagram with Perspective

- A **Block Diagram with Perspective** offers 3-D geometric shapes, directional lines, and a vanishing point for changing depth and perspective. The vanishing point is automatically included on the drawing page when a **Block Diagram with Perspective** template is opened. Shape perspectives automatically align toward the vanishing point when placed on the drawing:



To create a Block Diagram with Perspective:

- With the Preview Template open, click **Block Diagram** in the Category list.
- Click **Block Diagram with Perspective** in the Template list

OR from the main menu, select **File > New > Block Diagram > Block Diagram with Perspective**.

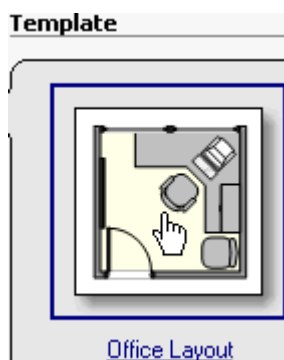
Working with Building Plan Templates

Creating an Office Layout

- An **Office Layout** offers cubicle, office accessory, office equipment, office furniture, wall, door, and window shapes. An **Office Layout** is useful for drawing office layouts, floor plans, inventory lists, and space plans.

To create an Office Layout:

- With the Preview Template open, click **Building Plan** in the Category list.
- Click **Office Layout** in the Template list:



OR from the main menu, select **File > New > Building Plan > Office Layout**.

Working with Flowchart Templates

Creating an Audit Diagram

- An **Audit Diagram** offers shapes for financial transactions, money management, decision flowcharts, and other financial communications. Audit diagrams are useful for analyzing financial processes.

To create an Audit Diagram:

- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Audit Diagram** in the Template list

OR from the main menu, select **File > New > Flowchart > Audit Diagram**.

Creating a Basic Flowchart

- A **Basic Flowchart** offers basic shapes and connectors useful for drawing an information flow, documenting procedures, and planning processes.

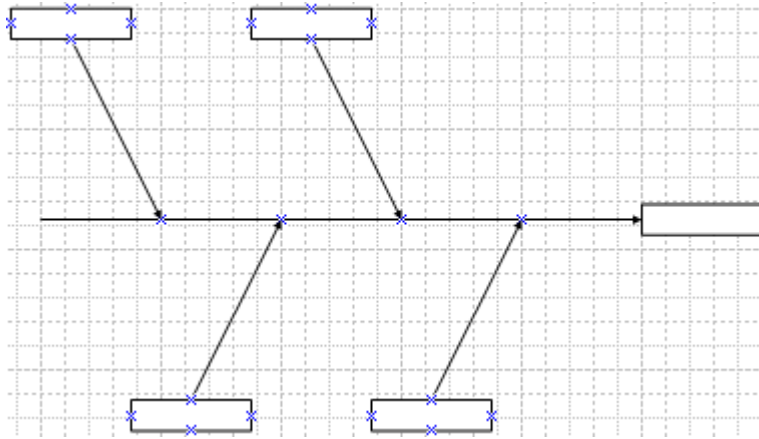
To create a Basic Flowchart:

- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Basic Flowchart** in the Template list

OR from the main menu, select **File > New > Flowchart > Basic Flowchart**.

Creating a Cause and Effect Diagram

- A **Cause and Effect Diagram** offers effect, primary cause, and secondary cause shapes to document factors that contribute to a given outcome. Cause and effect shapes are automatically included on the drawing page when a **Cause and Effect Diagram** template is opened:



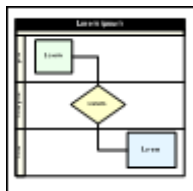
To create a Cause and Effect Diagram:

- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Cause and Effect Diagram** in the Template list

OR from the main menu, select **File > New > Flowchart > Cause and Effect Diagram**.

Creating a Cross-Functional Flowchart

- A **Cross-Functional Flowchart** shows the relationship between a process and the organizational or functional units responsible for the process. The **Cross-Functional Flowchart** offers bands, which represent the functional units, and shapes, which are responsible for the processes:

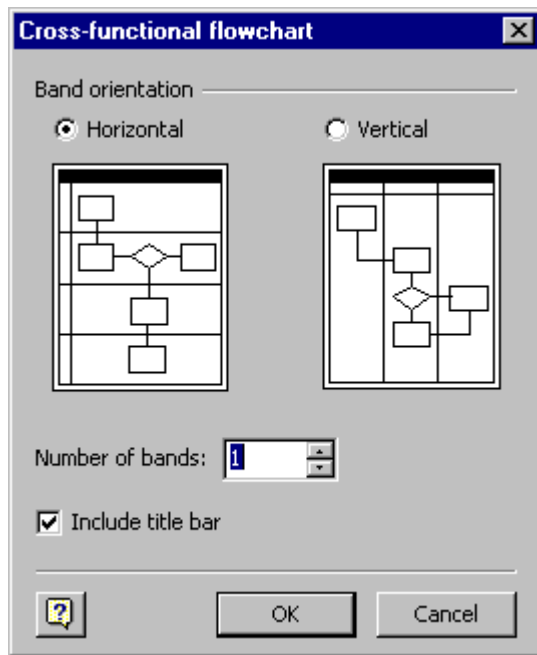


To create a Cross-Functional Flowchart:

- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Cross-Functional Flowchart** in the **Template** list

OR from the main menu, select **File > New > Flowchart > Cross-Functional Flowchart**.

Note: When you create a **Cross-Functional Flowchart**, you will be prompted to select the number of bands in the flowchart and the orientation of the bands:



Creating a Mind Mapping Diagram

- A **Mind Mapping Diagram** offers graphical representations of thought processes to create drawings depicting brainstorming and note-taking. Mind maps are useful for meeting ideas, event planning, and outlines.

To create a Mind Mapping Diagram :

- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Mind Mapping Diagram** in the Template list

OR from the main menu, select **File > New > Flowchart > Mind Mapping Diagram**.

Creating a TQM Diagram

- A **TQM Diagram** is used to create a flowchart for **Total Quality Management** projects. TQM diagrams are useful for drawing improvement plans and quality solutions.

To create a TQM Diagram :

- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **TQM Diagram** in the Template list

OR from the main menu, select **File > New > Flowchart > TQM Diagram**.

Creating a Work Flow Diagram

- A **Work Flow Diagram** is useful for describing, analyzing, and documenting information flow, business processes, and human resources tasks.

To create a Work Flow Diagram:

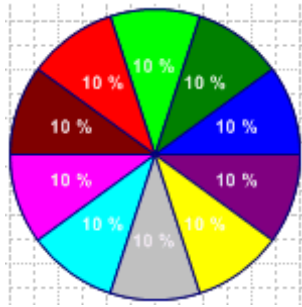
- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Work Flow Diagram** in the Template list

OR from the main menu, select **File > New > Flowchart > Work Flow Diagram**.

Working with Form and Chart Templates

Creating Charts and Graphs

- **Charts and Graphs** offer x-axis, y-axis, normal curve, and other shapes to create 2-D and 3-D bar graphs, line graphs, pie charts, and feature comparison charts:



- **Charts and Graphs** are useful for illustrating reports.

To create Charts and Graphs:

- With the Preview Template open, click **Forms and Charts** in the Category list.
- Click **Charts and Graphs** in the Template list

OR from the main menu, select **File > New > Forms and Charts > Charts and Graphs**.

Creating a Form Design

- A **Form Design** is useful for creating product orders, inventory records, customer information, timesheets, rosters, and other business forms.

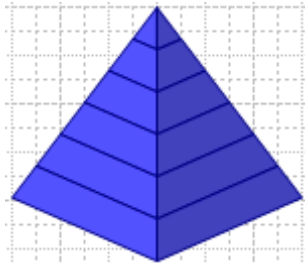
To create a Form Design:

- With the Preview Template open, click **Forms and Charts** in the Category list.
- Click **Form Design** in the Template list

OR from the main menu, select **File > New > Forms and Charts > Form Design**.

Creating Marketing Charts and Diagrams

- **Marketing Charts and Diagrams** are useful for drawing product life cycles, the marketing mix, pricing matrices, time and cost analysis, and other marketing processes. **Marketing Charts and Diagrams** include 2-D and 3-D bar graphs, circle spoke drawings, line graphs, market analysis drawings, pie charts, and pyramids:



To create Marketing Charts and Diagrams:

- With the Preview Template open, click **Forms and Charts** in the Category list.
- Click **Marketing Charts and Diagrams** in the Template list

OR from the main menu, select **File > New > Forms and Charts > Marketing Charts and Diagrams**.

Working with Map Templates

Creating a Directional Map

- A **Directional Map** offers landmark shapes, metro shapes, recreation shapes, transportation shapes, and road shapes useful for drawing maps and routing directions.

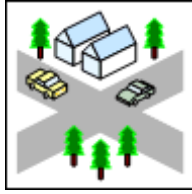
To create a Directional Map:

- With the **Preview Template** open, click **Map** in the **Category** list.
- Click **Directional Map** in the Template list

OR from the main menu, select **File > New > Map > Directional Map**.

Creating a Directional Map 3D

- A **Directional Map 3D** offers 3-D shapes useful for illustrating small geographical areas:



To create a Directional Map 3D:

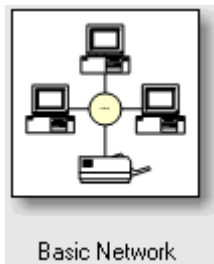
- With the **Preview Template** open, click **Map** in the **Category** list.
- Click **Directional Map 3D** in the Template list

OR from the main menu, select **File > New > Map > Directional Map 3D**.

Working with Network Templates

Creating a Basic Network

- A **Basic Network** offers network and computer equipment shapes useful for drawing network architecture diagrams:



To create a Basic Network:

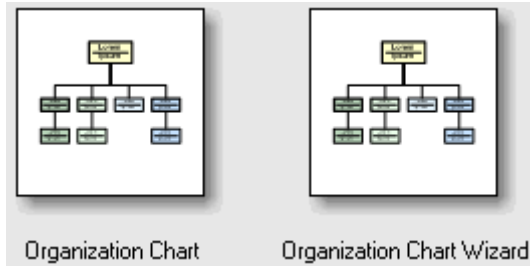
- With the **Preview Template** open, click **Network** in the **Category** list.
- Click **Basic Network** in the Template list

OR from the main menu, select **File > New > Network > Basic Network**.

Working with Organization Chart Templates

Creating an Organization Chart

- An **Organization Chart** offers shapes to graphically represent the reporting relationships, as well as activities and functions of employees in an organization:



To create an Organization Chart:

- With the Preview Template open, click **Organization Chart** in the Category list.
- Click **Organization Chart** in the Template list

OR from the main menu, select **File > New > Organization Chart > Organization Chart**.

Using the Organization Chart Wizard

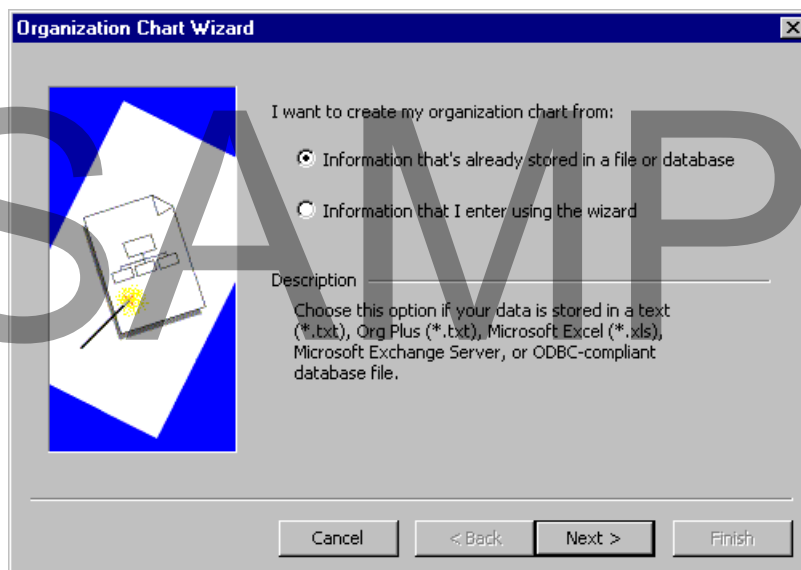
- The **Organization Chart Wizard** generates an organization chart by using existing personnel data or by using data entered into the wizard.

To use the Organization Chart Wizard:

- With the Preview Template open, click **Organization Chart** in the Category list.
- Click Organization Chart Wizard in the Template list

OR from the main menu, select **File > New > Organization Chart > Organization Chart Wizard**.

This opens the Organization Chart Wizard:



- Depending on whether you're using an existing database or entering information using the wizard, complete the wizard steps.

Working with Project Schedule Templates

Creating a Calendar

- A **Calendar** offers shapes to create a monthly or yearly calendar.

To create a Calendar:

- With the Preview Template open, click **Project Schedule** in the Category list.
- Click **Calendar** in the Template list

OR from the main menu, select **File > New > Project Schedule > Calendar**.

Creating a Gantt Chart

- A **Gantt Chart** offers scheduling shapes useful for project management, scheduling, planning, and goal setting.
- Opening a Gantt chart template opens a **Gantt Chart Options** dialog box requesting chart information. The information entered automatically creates a **Gantt Chart** on the drawing page:

ID	Task Name	Start	Finish	Duration	Resources
1	Task 1	3/21/2002	3/21/2002	1d	Resource 1
2	Task 2	3/21/2002	3/21/2002	1d	Resource 2
3	Task 3	3/21/2002	3/21/2002	1d	Resource 3
4	Task 4	3/21/2002	3/21/2002	1d	Resource 4
5	Task 5	3/21/2002	3/21/2002	1d	Resource 5

To create a Gantt Chart:

- With the Preview Template open, click **Project Schedule** in the Category list.
- Click **Gantt Chart** in the Template list

OR from the main menu, select **File > New > Project Schedule > Gantt Chart**.

Creating a PERT Chart

- A **Program Evaluation and Review Technique (PERT) Chart** is useful for monitoring projects, establishing time frames, and showing task dependencies.

To create a PERT Chart:

- With the Preview Template open, click **Project Schedule** in the Category list.

- Click **PERT** Chart in the Template list

OR from the main menu, select **File > New > Project Schedule > PERT Chart**.

Creating a Timeline

- A **Timeline** offers timeline, milestone, and linear shapes useful for drawing a series of events.

To create a Timeline:

- With the Preview Template open, click **Project Schedule** in the Category list.
- Click **Timeline** in the Template list

OR from the main menu, select **File > New > Project Schedule > Timeline**.

Review Questions

How would you:

- Create a Basic Diagram?
- Create a Block Diagram?
- Create a Block Diagram with Perspective?
- Create an Office Layout?
- Create an Audit Diagram?
- Create a Basic Flowchart?
- Create a Cause and Effect Diagram?
- Create a Cross-Functional Flowchart?
- Create a Mind Mapping Diagram?
- Create a TQM Diagram?
- Create a Work Flow Diagram?
- Create Charts and Graphs?
- Create a Form Design?
- Create Marketing Charts and Diagrams?
- Create a Directional Map?
- Create a Directional Map 3D?
- Create a Basic Network?
- Create an Organization Chart?
- Use the Organization Chart Wizard?
- Create a Calendar?
- Create a Gantt Chart?
- Create a PERT Chart?
- Create a Timeline?

Building a Drawing

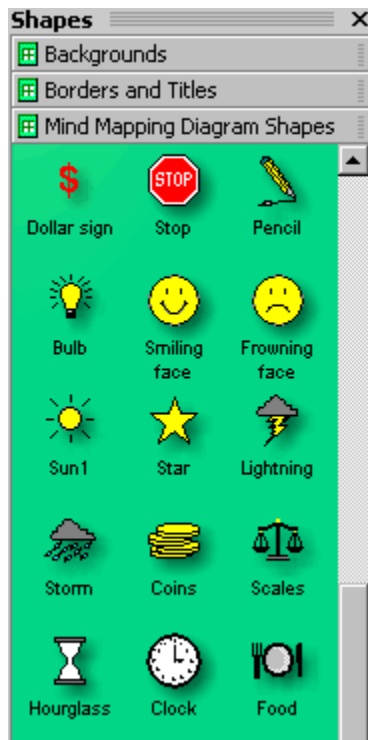
When you have completed this learning module you will have seen how to:

- Use the Stencil Toolbar
- Open a Stencil
- Switch Between Stencils
- Create a New Stencil
- Add Shapes to a Stencil
- Name a Stencil
- Edit a Stencil
- Save a Stencil
- Close a Stencil
- Use the Document Stencil
- Change the Stencil View
- Add a Shape to the Drawing Page
- Add Text to a Shape
- Move a Shape
- Resize a Shape
- Find a Shape
- Delete a Shape from the Drawing Page
- Manually Connect Shapes
- Manually Connect a Series of Shapes
- Automatically Connect Shapes
- Use the Connector Tool Button
- Add Connectors from a Stencil
- Create Dynamic Glue
- Create Static Glue
- Add Text to a Connector
- Delete a Connector from the Drawing Page
- View and Hide Connection Points
- Open the Backgrounds Stencil
- Add a Background
- Open the Borders and Titles Stencil
- Add a Border and Title

Working with Stencils

About Stencils

- Stencils contain Microsoft SmartShapes used to create drawings:



- Creating a drawing based on a template automatically opens task-related stencils. By default, the **Backgrounds** and **Borders and Titles** stencils open for most templates. Stencils can also be opened independently of a template (useful when creating a new blank document) and can be customized and saved.

Using the Stencil Toolbar

- The **Stencil** toolbar provides quick access to some commonly used stencil tasks.

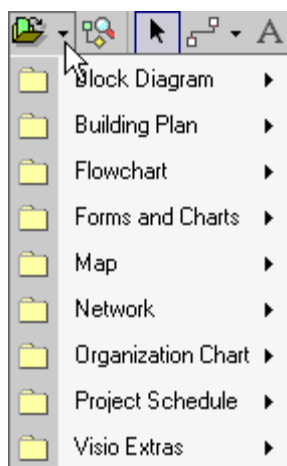
To display the Stencil toolbar:

- From the main menu, select **View > Toolbars > Stencil**:



Opening a Stencil

- Click the down arrow on the **Open Stencil** button on the **Standard** toolbar:



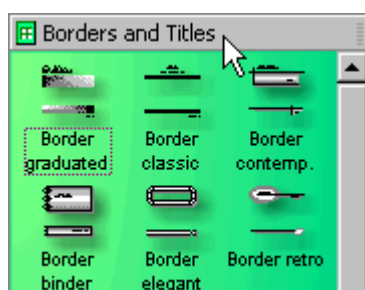
- From the drop-down menu, select the stencil you want to open.

OR

- From the main menu, select **File > Stencils > Open Stencil**. This opens the **Open Stencil** dialog box.
- Locate and select the stencil you want to open.
- Click **Open**.

Switching Between Stencils

- Click on the title bar of the stencil you want to view:



Creating a New Stencil

- Creating a new stencil is useful if you often use shapes from a variety of different stencils and/or you have created your own shapes.

To create a new stencil:

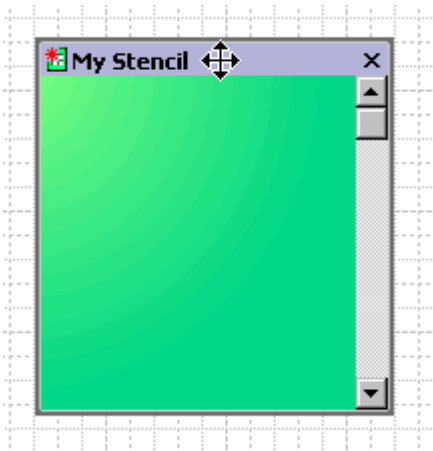
- From the main menu, select **File > Stencils > New Stencil**

OR click the **New Stencil** button on the **Stencil** toolbar.

Adding Shapes to a Stencil

To copy shapes from an existing stencil to a new stencil:

- Make sure both the existing and new stencils are open.
- Click and drag the new stencil title bar toward the drawing page so the stencil becomes a floating stencil:

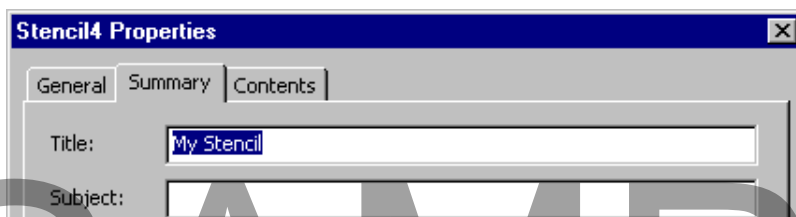


- Click and drag the shapes you want from the existing stencil into the new stencil.

Note: You can only add shapes to a stencil if the stencil is in **Edit** mode.

Naming a Stencil

- Right-click on the title bar of the stencil for which you want to add or change a name.
- From the pop-up menu, select **Properties**. This opens a **Properties** dialog box.
- Type a name for the stencil in the **Title** text box:



- Click **OK**.

Note: You can only change the properties for a stencil if the stencil is in **Edit** mode.

Editing a Stencil

- To make changes to a stencil, the stencil must be in edit mode.

To place a stencil in edit mode:

- Right-click on the title bar of the stencil you want to edit.

- From the pop-up menu, select **Edit**. A red asterisk will appear on the title bar indicating the stencil can be edited:



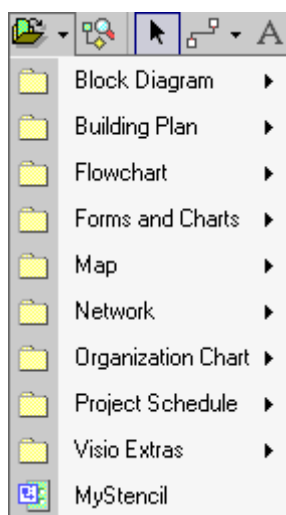
Saving a Stencil

- Right-click on the title bar of the stencil you want to save.
- From the pop-up menu, select **Save**.

Note: Only the **Save As** option will appear if the stencil is not in **Edit** mode.

- Enter a name in the **File name** box.
- Click **Save**.

Note: It is recommended that all stencils be saved in the **Solutions** folder located at the following file path: **Program Files\Microsoft Office\Visio10\1033**. Saving a stencil in this location adds it to the Visio stencil menu:

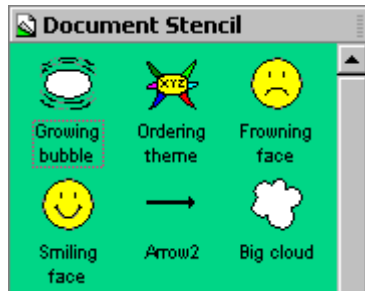


Closing a Stencil

- Right-click on the title bar of the stencil you want to close.
- From the pop-up menu, select **Close**.

Using the Document Stencil

- Any shape added to the drawing page is automatically added to the **Document Stencil**. The **Document Stencil** is useful for seeing all shapes in use on the drawing page, and for making an edit to a shape on the stencil which is then applied to all instances of that shape on the drawing page:



To view the Document Stencil:

- From the main menu, select **File > Stencils > Document Stencil**

OR click the **Document Stencil** button on the **Stencil** toolbar.

Note: The **Document Stencil** cannot be saved.

Changing the Stencil View

- Click the various view buttons on the **Stencil** toolbar.

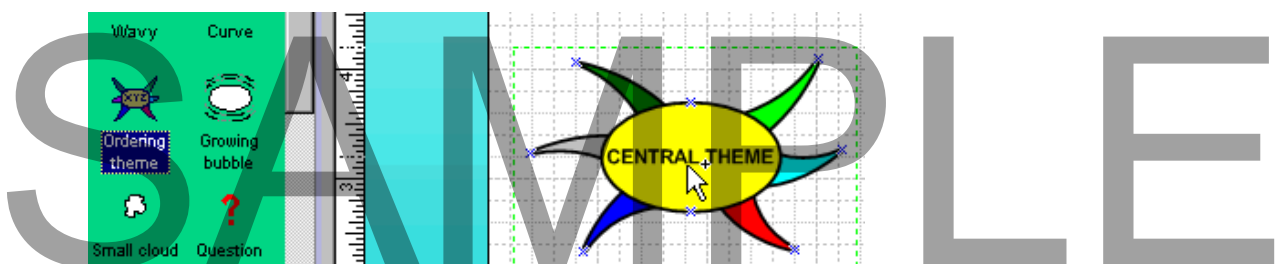
Working with Shapes

About Microsoft SmartShapes

- Microsoft SmartShapes are the shapes on a stencil used to create a Visio drawing. A shape can be anything from a line to a complex calendar.

Adding a Shape to the Drawing Page

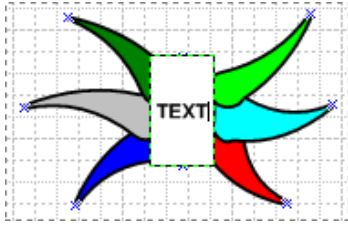
- Click and drag a shape from a stencil to the drawing page:



Adding Text to a Shape

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the shape for which you want to add text.

- Start typing:

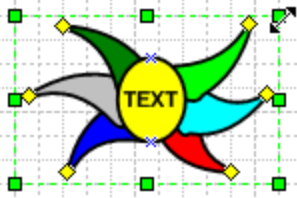


Moving a Shape

- Select the shape you want to move.
- Click and drag the shape to where you want.

Resizing a Shape

- Select the shape you want to resize.
- Click and drag the **Resize** handle to the size you want:



Finding a Shape

- Searching for a shape searches for shapes in existing stencils and on the Web.

To find a shape:

- Click the **Find Shape** button on the **Standard** toolbar

OR from the main menu, select **File > Find Shape**.

- Enter descriptive text to search on.
- Click **Go**.

Deleting a Shape from the Drawing Page

- Select the shape you want to delete.
- Click the **Delete** key on your keyboard.

Working with Connectors

About Connectors

- Connectors are lines that join shapes together to establish a relationship between the shapes. Connectors can be inserted automatically or manually and are also available on some stencils.
- Connectors automatically adjust and reposition when shapes are moved on the drawing page.

Manually Connecting Shapes

- To connect shapes, there must be two or more shapes on the drawing page.

To manually connect shapes:

- Click the **Connector Tool** button on the **Standard** toolbar.
- Mouse-over the shape you want the connection to originate from until a red box surrounds the shape:



- Click and drag the mouse over the shape you want to connect to until a red box surrounds the shape:



- Release the mouse button.

Manually Connecting a Series of Shapes

- Select each shape you want to connect (while holding down the **Shift** key) in the order you want them connected.
- From the main menu, select **Shape > Connect Shapes**.

Automatically Connecting Shapes

- Before placing any shapes on the drawing page, click the **Connector Tool** button on the **Standard** toolbar.
- Add shapes to the drawing page. Each shape automatically connects to the one placed before it.

Note: If you do not want a new shape to connect to the one placed before it, select the shape you want the connection to originate from and then add a new shape to the drawing page.

Using the Connector Tool Button

- Connecting shapes using the **Connector Tool** button automatically creates a **Dynamic Connector** shape. A Dynamic Connector avoids passing through another shape, so when a shape is in the way of a connection, the Dynamic Connector will route around it as opposed to going through it.

Adding Connectors from a Stencil

- Connectors are also available from selected stencils in addition to the **Connectors** stencil.

To open the Connectors stencil:

- From the main menu, select **File > Stencils > Visio Extras > Connectors**.

To add connectors from a stencil:

- Click and drag the connector from the stencil to the drawing page.
- Drag the connector's begin point to the shape you want the connection to originate from until a red box surrounds the shape.

Note: The begin point is represented by an **x**.

- Drag the connector's end point to the shape you want to connect to until a red box surrounds the shape.

Note: The end point is represented by a **+**.

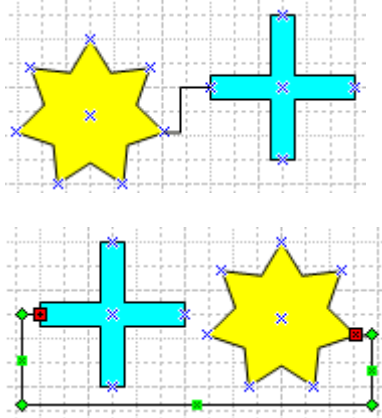
Creating Dynamic Glue

- Dynamic glue is also known as shape-to-shape glue. Connecting two shapes by having a red box surround each shape during connection creates dynamic glue.
- When shapes connected by dynamic glue are moved, the connector repositions so the two closest points between the shapes are connected:



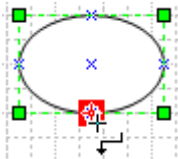
Creating Static Glue

- Static glue is also known as point-to-point glue. Static glue connects connectors to specific points on shapes so when the shapes are moved, the connector stays glued to the original points:

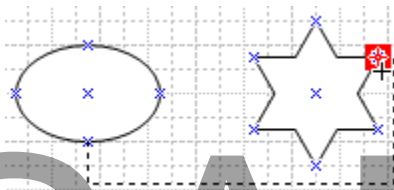


To create static glue:

- Click the **Connector Tool** button on the **Standard** toolbar.
- Mouse over the **connection point** you want the connection to originate from until a red box surrounds the connection point:



- Click and drag the mouse over the **connection point** you want to connect to until a red box surrounds the connection point:

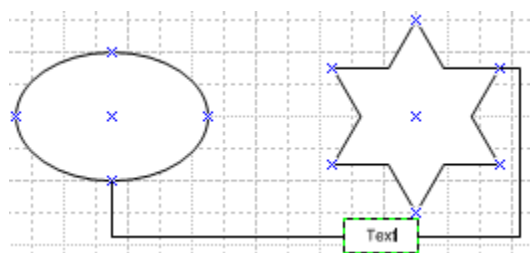


- Release the mouse button.

Adding Text to a Connector

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the connector for which you want to add text.

- Start typing:



Deleting a Connector from the Drawing Page

- Select the connector you want to delete.
- Click the **Delete** key on your keyboard.

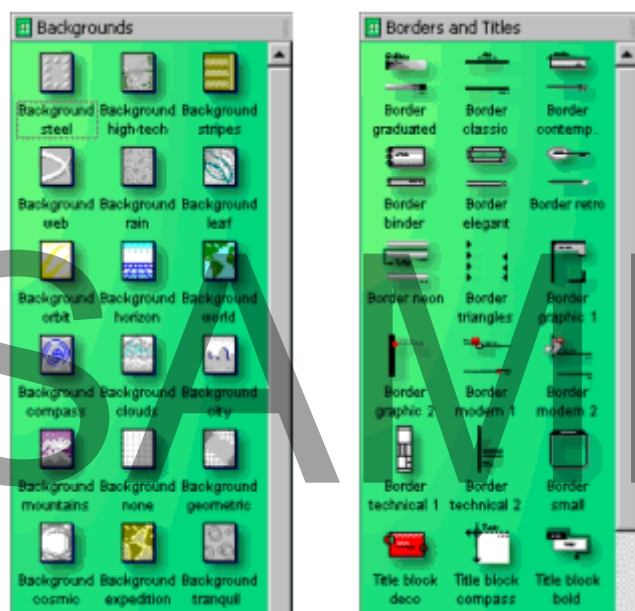
Viewing and Hiding Connection Points

- From the main menu, select **View > Connection Points**.

Adding Backgrounds, Borders, and Titles

Opening the Backgrounds Stencil

- The **Backgrounds** stencil opens automatically when a drawing is created from a template. Visio 2002 offers 18 backgrounds to choose from:



To open the Backgrounds stencil (if it is not already open):

- From the main menu, select **File > Stencils > Visio Extras > Backgrounds**.

Adding a Background

- Click the title bar on the **Backgrounds** stencil to display the backgrounds available.
- Click and drag a background from the **Backgrounds** stencil to the drawing page.
- Click **Yes** to make the shape the background image for the page:



Opening the Borders and Titles Stencil

- The **Borders and Titles** stencil opens automatically when a drawing is created from a template.

To open the **Borders and Titles** stencil (if it is not already open):

- From the main menu, select **File > Stencils > Visio Extras > Borders and Titles**.

Adding a Border and Title

- Click the title bar on the **Borders and Titles** stencil to display the borders and titles available.
- Click and drag a border or title from the **Borders and Titles** stencil to the drawing page.

Review Questions

How would you:

- Use the Stencil Toolbar?
- Open a Stencil?
- Switch Between Stencils?
- Create a New Stencil?
- Add Shapes to a Stencil?
- Name a Stencil?

- Edit a Stencil?
- Save a Stencil?
- Close a Stencil?
- Use the Document Stencil?
- Change the Stencil View?
- Add a Shape to the Drawing Page?
- Add Text to a Shape?
- Move a Shape?
- Resize a Shape?
- Find a Shape?
- Delete a Shape from the Drawing Page?
- Manually Connect Shapes?
- Manually Connect a Series of Shapes?
- Automatically Connect Shapes?
- Use the Connector Tool Button?
- Add Connectors from a Stencil?
- Create Dynamic Glue?
- Create Static Glue?
- Add Text to a Connector?
- Delete a Connector from the Drawing Page?
- View and Hide Connection Points?
- Open the Backgrounds Stencil?
- Add a Background?
- Open the Borders and Titles Stencil?
- Add a Border and Title?

SAMPLE

Formatting a Drawing

When you have completed this learning module you will have seen how to:

- Use the Format Text Toolbar
- Change the Font Type
- Change the Font Size
- Change the Font Color
- Change the Font Case
- Change the Font Position
- Change the Font Transparency
- Change the Font Style
- Change Character Spacing
- Align Text
- Change Line Indentation
- Change Paragraph Spacing
- Change Text Margins
- Add a Text Background
- Add Tabs
- Add Bullets
- Use the Format Shape Toolbar
- Change the Fill Color
- Change the Fill Pattern
- Change the Fill Transparency
- Add a Shadow
- Change the Line Color
- Change the Line Weight
- Change the Line Pattern
- Change the Line Ends
- Round Corners
- Apply a Color Scheme
- Use the Action Toolbar
- Group and Ungroup Shapes
- Order Shapes
- Rotate Shapes
- Flip Shapes
- Align Shapes
- Distribute Shapes
- Lay Out Shapes
- Center a Drawing
- Use the Layout and Routing Toolbar
- Change Connector Routing Options
- Change Routing Style and Direction
- Separate Overlapping Connectors
- Overlap Separated Connectors
- Set Line Jump Options

- Set Space Options
- Use Curved and Straight Connectors
- Use the Snap and Glue Toolbar
- View Active Snap and Glue Elements
- Snap to an Item
- Glue to an Item
- Assign a Shape to a Layer
- Create a New Layer
- Show and Hide Layers
- Select a Layer to Print
- Lock a Layer
- Rename a Layer
- Assign a Color to a Layer
- Delete a Layer
- Display the Insert Clip Art Task Pane
- Search for Clip Art
- Customize a Clip Art Search
- Use the Clip Organizer
- Search for Clips Online
- Insert Clip Art
- Insert a Picture from a File
- Insert a Picture from a Scanner or Camera

Formatting Text

Using the Format Text Toolbar

- The **Format Text** toolbar provides quick access to some commonly used text formatting tasks.

To display the Format Text toolbar:

- From the main menu, select **View > Toolbars > Format Text**:



Changing the Font Type

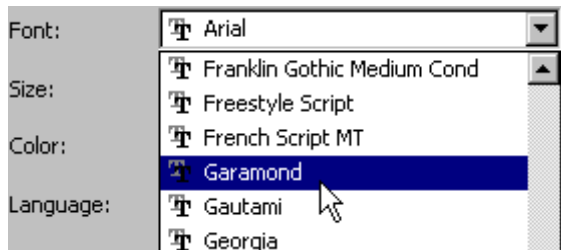
- Double-click the text box containing the text you want to format

OR click the **Text Tool** button on the **Standard** toolbar and click in the text box containing the text you want to format.

- Select the text for which you want to change the font type.
- Select a font type from the **Font** drop-down menu on the **Formatting** toolbar.

OR

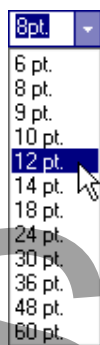
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Select a font type from the **Font** drop-down menu:



- Click **OK**.

Changing the Font Size

- Double-click the text box containing the text you want to format
OR click the **Text Tool** button on the **Standard** toolbar and click in the text box containing the text you want to format.
- Select the text for which you want to change the font size.
- Select a font size from the **Font size** drop-down menu on the **Formatting** toolbar:



OR **SAMPLE**

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Select a font size from the **Size** drop-down menu.
- Click **OK**.

Changing the Font Color

- Double-click the text box containing the text you want to format

OR click the **Text Tool** button on the **Standard** toolbar and click in the text box containing the text you want to format.

- Select the text for which you want to change the font color.
- Click the **Text Color** down arrow on the **Formatting** toolbar.
- From the drop-down menu, select the font color you want.

Note: For more colors, click **More Text Colors**.

OR

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Select a font color from the **Color** drop-down menu.
- Click **OK**.

Changing the Font Case

- Double-click the text box containing the text you want to format

OR click the **Text Tool** button on the **Standard** toolbar and click in the text box containing the text you want to format.

- Select the text for which you want to change the font case.
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Select a font case from the **Case** drop-down menu.
- Click **OK**.

Changing the Font Position

- Changing the font position makes font superscript or subscript.

To change the font position:

- Double-click the text box containing the text you want to format

OR click the **Text Tool** button on the **Standard** toolbar and click in the text box containing the text you want to format.

- Select the text for which you want to change the font position.
- Click the **Superscript** or **Subscript** button on the **Format Text** toolbar.

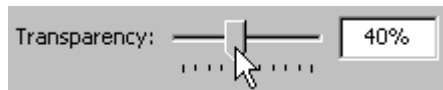
OR

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Select a font position from the **Position** drop-down menu.
- Click **OK**.

Changing the Font Transparency

- Double-click the text box containing the text you want to format

OR click the **Text Tool** button on the **Standard** toolbar and click in the text box containing the text you want to format.
- Select the text for which you want to change the font transparency.
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Click and drag the **Transparency** slide indicator to the transparency you want:



- Click **OK**.

SAMPLE

End of the preview sample



This sample is approximately half of the full course. Please see the table of contents at the beginning of this document to see the full list of topics covered in the full course.

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