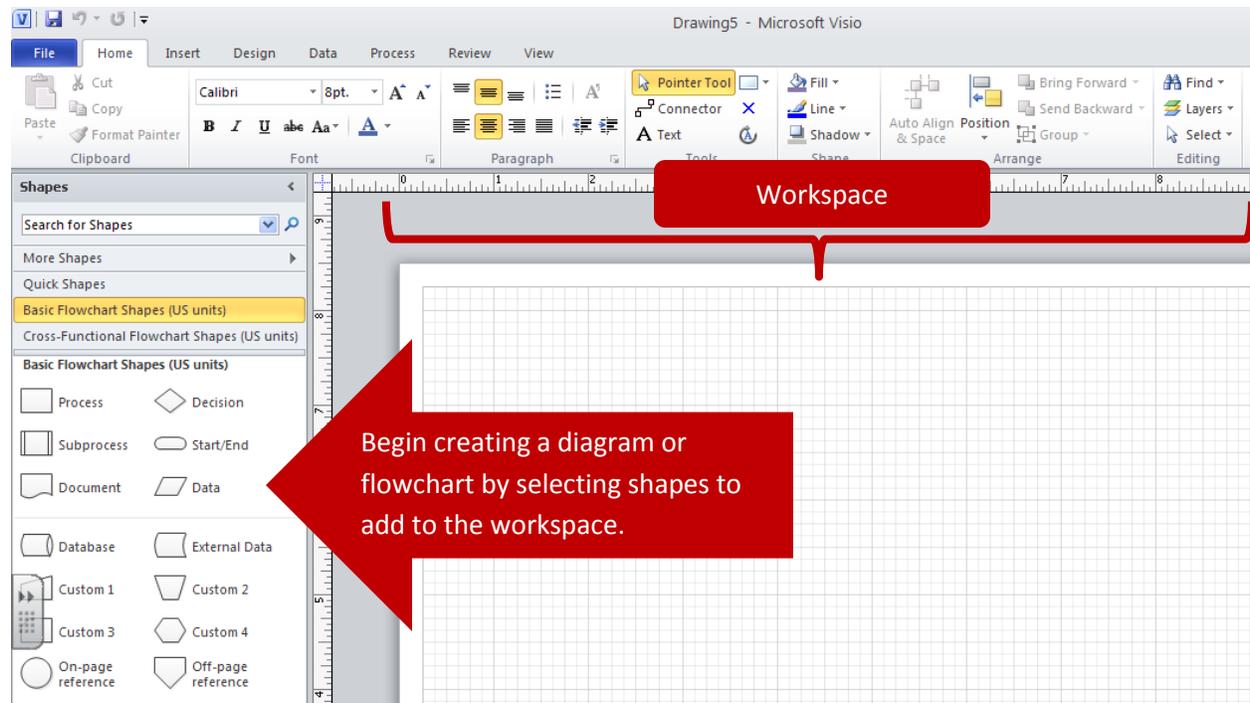


Microsoft Visio 2010: An Introduction

This document provides an introduction to using Microsoft Visio 2010. Microsoft Visio is software designed to translate complex information from text and tables into diagrams. Visio diagrams facilitate communication by breaking down information and displaying it to be understood at a glance.

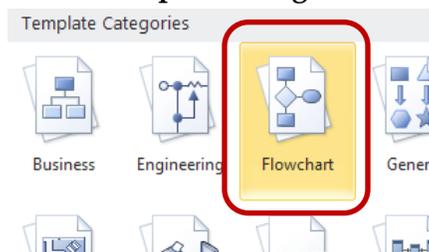
The Visio Environment



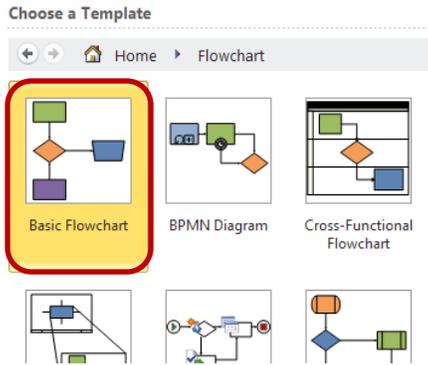
Creating a Basic Flowchart

To begin creating your flowchart with Microsoft Visio, the first step is to select a template.

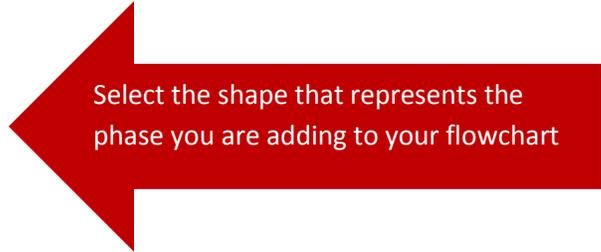
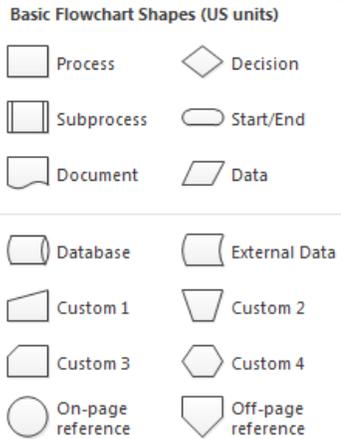
1. Under **Template Categories**, select **Flowchart**.



2. You now have the option of selecting different templates of Flowcharts. Select **Basic Flowchart**, and click **Create**.

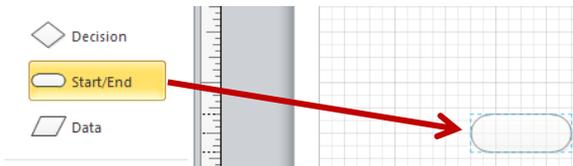


3. To the left of the screen, you will notice the different types of shapes that can be added to your diagram. Each shape represents a different phase or milestone of your flowchart.

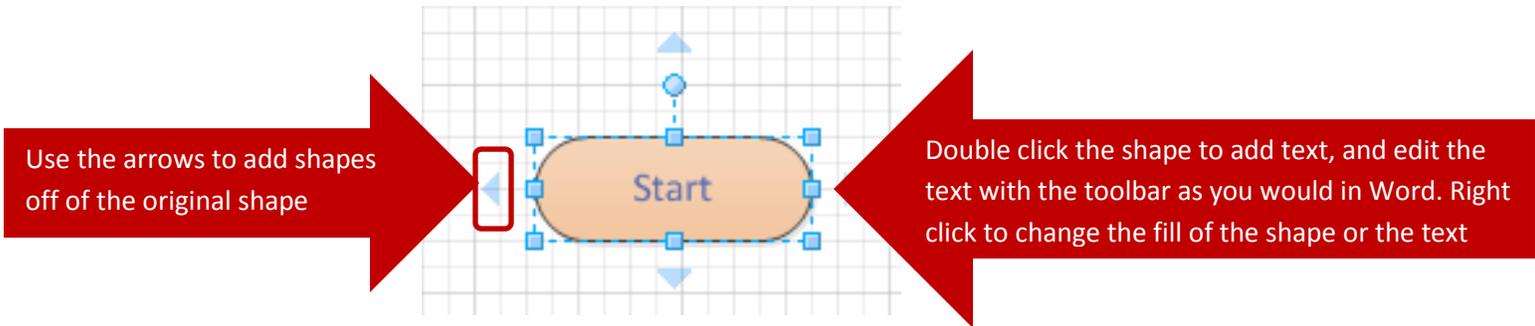


Adding Shapes

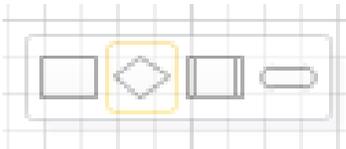
1. After you choose a shape, **click** the shape, and **drag** it to the right of the screen, on the blank worksheet.



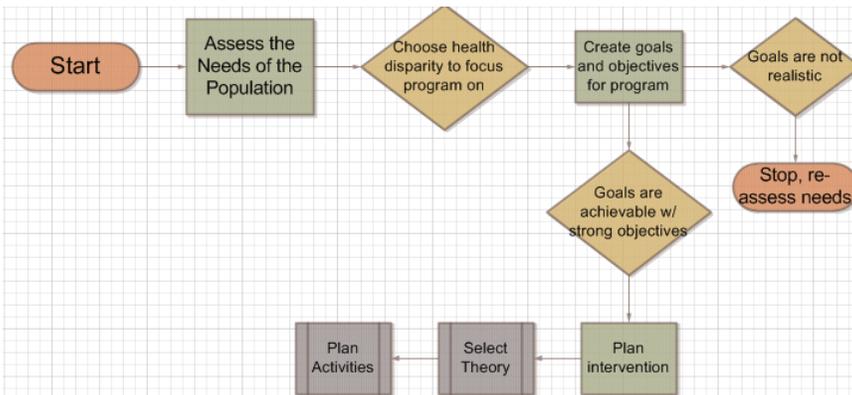
2. To edit the shape you have just placed on your worksheet, **click** the shape. Points will appear that allow you to rotate the shape and change the size. You will also notice when you roll your mouse over the shape, arrows appear in each direction. These allow you to add shapes and link them together.



3. To add another shape off of your starting shape, **click** the arrow in the direction you wish to add the shape. Because we are using the **Basic Flowchart** shapes, you may select to add a **Process** (rectangle), **Decision** (diamond), **Subprocess** (rectangle), or **Start/End** (oval). If you were using a different category of shapes, you would select a shape from that specific category.

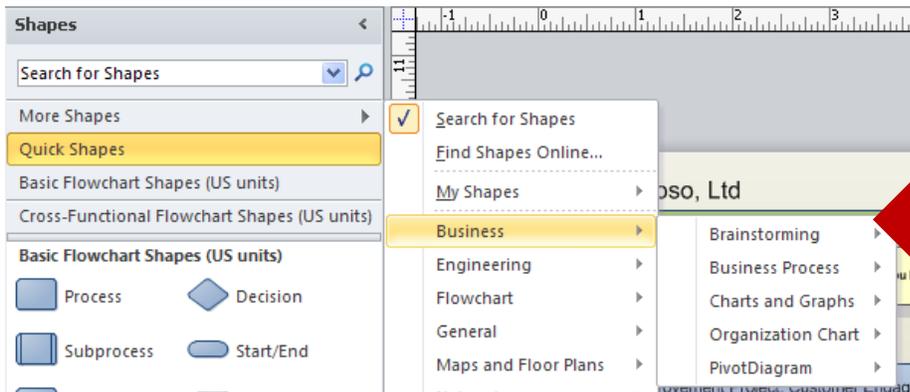


4. Continue to add shapes and edit them as you wish to complete the process in the flowchart.



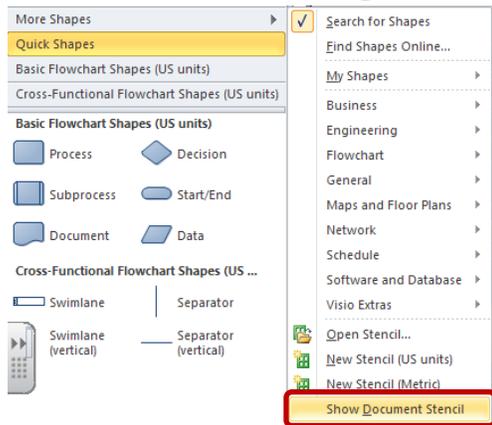
Using Stencils

The shapes are organized into categories that are referred to as **Stencils**.

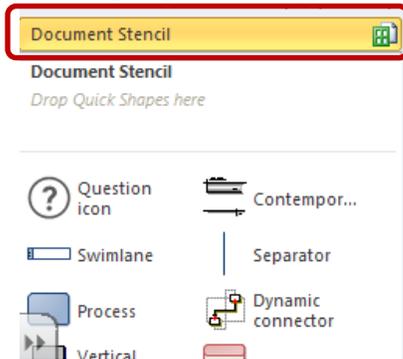


Browse through the various **Stencils** to find different shapes. Click **More Shapes** to view additional stencils.

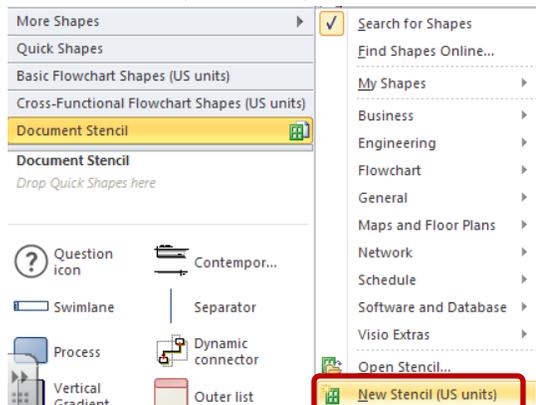
1. To create a **stencil** that consists only of the shapes currently being used in your document, select **More Shapes**, and **Show Document Stencil**.



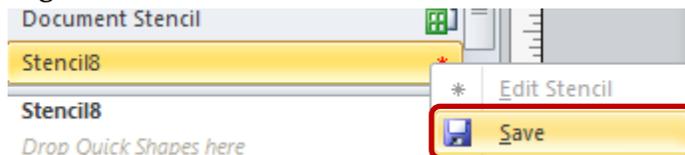
2. The **Document Stencil** will now appear with the other stencils, and will consist only of the shapes previously placed in the open document.



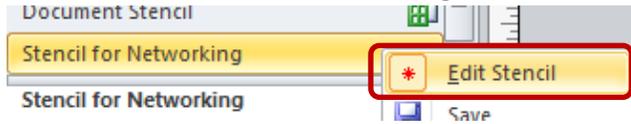
3. To **create a stencil** that can be used across different documents, click **More Shapes**, and **New Stencil (US units)**.



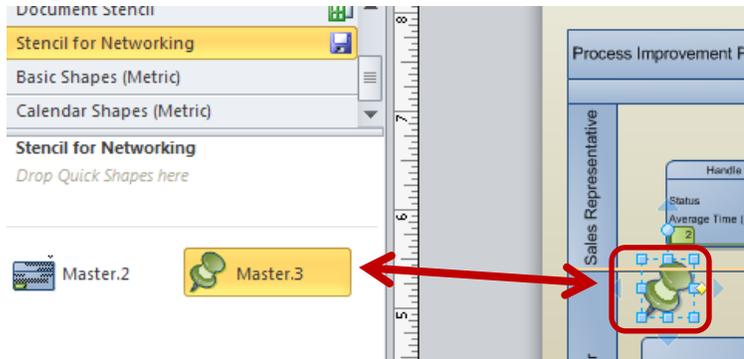
4. **Right click** the new stencil and click **Save** to name the stencil.



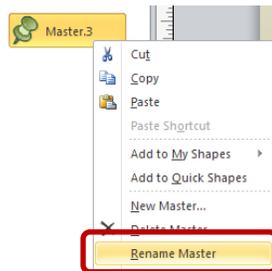
- When the stencil has a **red asterisk** to the right of it, that means it is in **edit mode**. To switch in and out of edit mode, **right click** the stencil and select **Edit Stencil**.



- Choose the shapes you wish to add to your new stencil from their current stencils and add them to your worksheet. To add the shape to your new stencil, **click and drag** the shape to the new stencil.



- To **rename the new shape** added to your stencil, **right click the shape** and select **Rename Master** to add the new name.

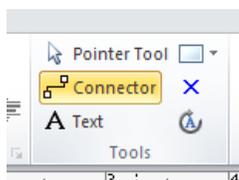


Using Glue to Make Connections

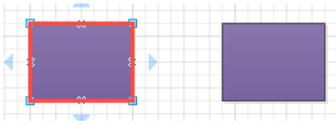
Glue is the term that refers to making connections between points or shapes. **Static glue** refers to making a point to point connection between shapes, and **dynamic glue** refers to making a shape to shape connection, where specific points do not play a role. Think of static glue as “fixed point” glue. The glued object is affixed to the target at one point and one point only. Dynamic glue is “fixed object” glue. The glued object will remain affixed to the target, but at whatever point is most convenient.

To use glue to make connections between shapes,

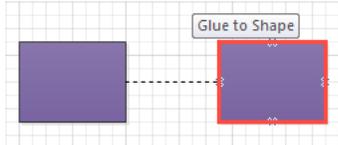
- Click **Connector** in the tools box under the **Home** tab.



2. To use **Dynamic glue** and make a shape to shape connection, roll the mouse over the first shape until a **red box** forms around the entire shape.



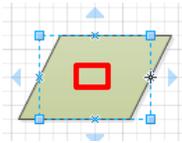
- a. Then **click and hold the mouse** and drag it over to the second shape until the red box forms around that shape, and release the mouse.



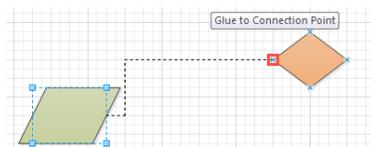
- b. The shapes will now remain glued together, even when they are moved.



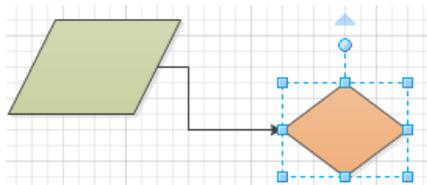
3. To use **Static glue** and make a point to point connection, roll the mouse over the first shape until a red box forms around the point you wish to connect.



- a. Then **click and hold the mouse** and drag it over to the second shape until the red box forms around the point you wish to connect on that shape, and release the mouse.



- b. The points will now remain glued together.

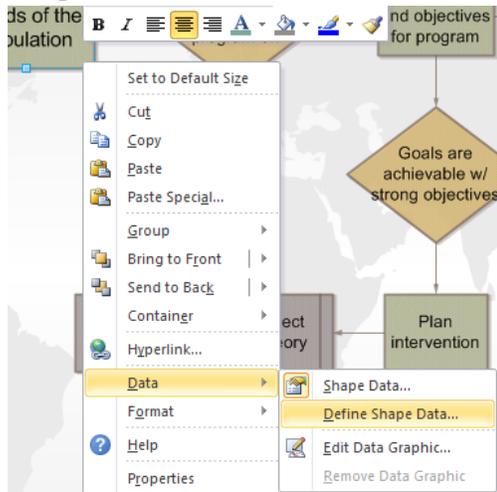


Adding Data to Shapes

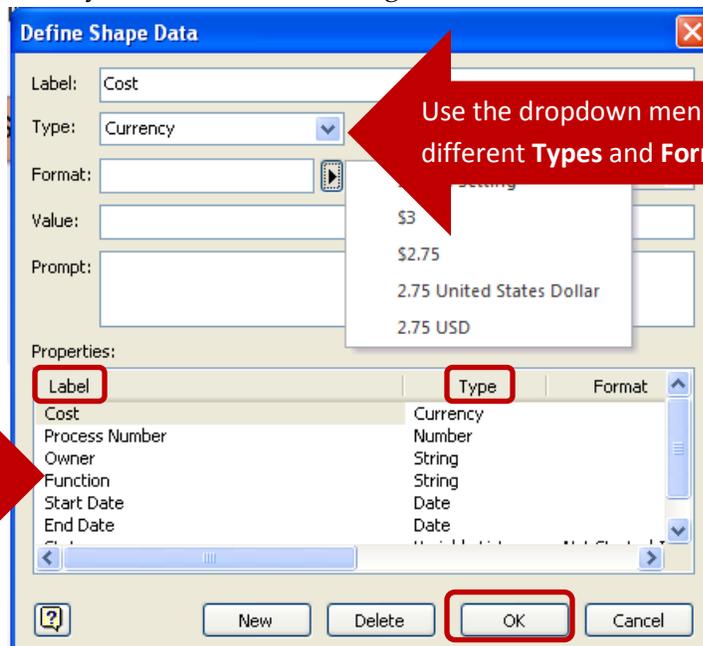
To add data to a shape,

1. First, you need to define the type of data you wish to add to the different shapes in your diagram. **Right click** the shape you want to add data to, click **Data** and then **Define**

Shape Data.



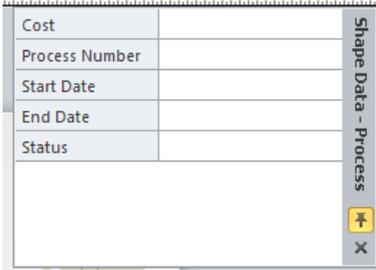
2. Add or delete the properties you wish to enter into the data for each shape. You can add start dates, end dates, costs, etc. When you select a label, choose the type of unit you would like to use, and a format of that unit. Click **New** or **Delete** to add and delete labels. When you are finished making edits, click **OK**.



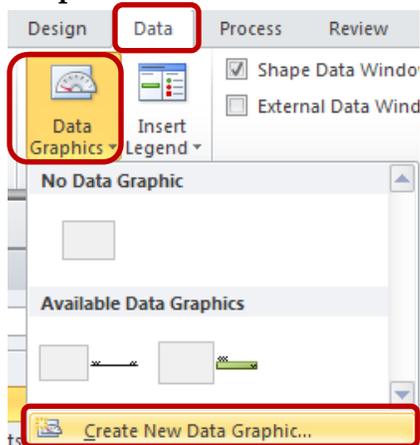
3. After defining the shape data, **right click** on the shape again, click **Data**, and choose **Shape Data**.



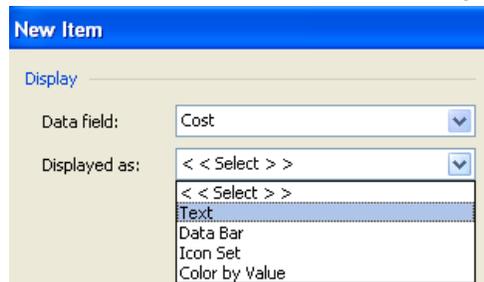
4. A box will appear in the upper right hand corner, and you can **enter your data** for each label you previously selected.



5. After entering all the data, you can select to have a **Data Graphic** appear on your diagram. Under the **Data** tab, click **Data Graphics**, and select **Create New Data Graphic**.

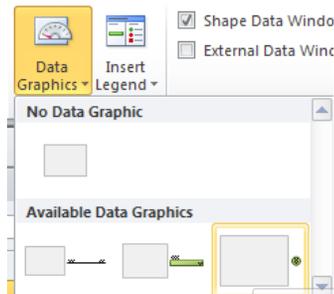


- a. Click **New Item**.
- b. Select a **Data field**, and under the **Displayed as** dropdown menu, choose a way for the data to be shown on the diagram. Click **OK**, and then click **OK** again.

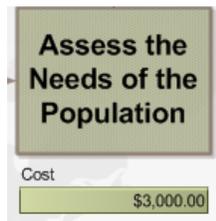


- c. Click the shape for which you wish to display the data.

- d. Click the **Data Graphics** icon, and select your data graphic under **Available Data Graphics**.



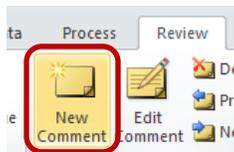
- e. The data will now appear in the form you chose under the shape you have selected.



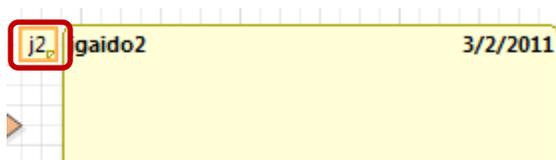
Using Markup Tools

Markup tools allow users to add comments to a diagram or drawing.

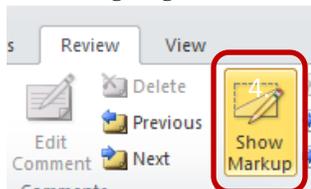
1. To **add a comment**, under the **Review** tab, click **New Comment**.



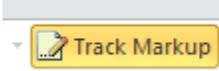
2. A yellow box will appear where you can type your comment. To move the location of the comment, **click and drag** the small highlighted box containing the initials of your ID or name.



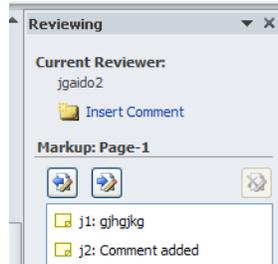
3. When looking at a diagram, if you would like to be able to view the different comments made by others, click **Show Markup** under the **Review** tab. Click **Show Markup** again to un-highlight the button, and hide all comments.



4. Click **Track Markup** under the **Review tab** to track and view all comments, annotations and shapes added to the drawing. Edits are tracked on separate markup layouts without changing the original drawing.



- a. Along the right of the screen in the **Reviewing** pane, scroll through all the Markups made to the drawing.



5. Ink can also be added to the diagram.

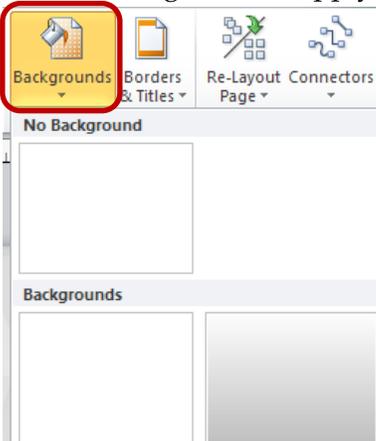
Formatting your Diagram

There are different ways to format your diagram after you have created it.

1. To change the theme of your diagram, click the **Design tab**, then select a theme. Colors and effects can be selected, as well.



2. To add a background to your diagram, under the **Design tab**, click **Backgrounds**, and select a background to apply to your flowchart.

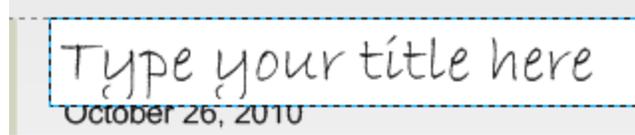


3. To add a title or border to your diagram, under the **Design tab**, click **Borders & Titles**, and select a border pattern to add to your diagram.

- a. Along the bottom of the screen, you will notice a new tab that appeared labeled **VBackground-1**. Click the tab in order to edit the title.

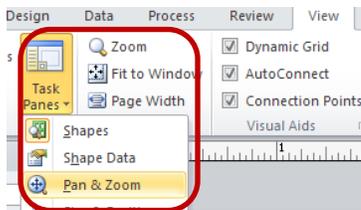


- b. Click the text box you wish to edit, and type in your new title. Edit the text with the options under the **Home** tab.

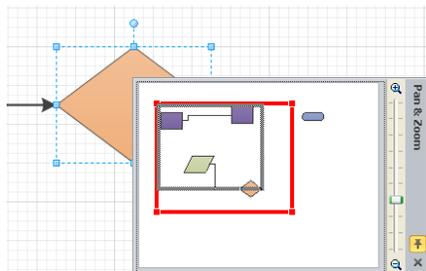


Panning and Zooming

1. Under the **View** tab, select **Task Panes** and **Pan & Zoom**.



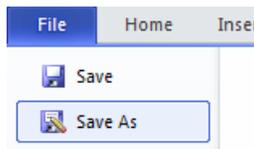
2. Use the **Pan & Zoom** box to click and drag the area you wish to zoom into.



Saving in Alternative Formats

Saving Visio files in alternative formats provides flexibility so that users who do not have Visio can still view the drawing or diagram.

1. Under the **File** tab, choose **Save As**.



2. Next to **Save as type**, scroll through the options to choose the file type you wish to save the drawing as. Choose from earlier versions of Visio, graphic files including JPEG or TIF, and XPS files.

