Microsoft Visio

Open templates

You begin a Microsoft Office Visio diagram with a template—a file that opens one or more stencils that contain the shapes you need to create your diagram. Templates also include the styles, settings, and tools appropriate for the drawing type.

Open a template

1. On the **File** menu, point to **New**, and then click **Choose Drawing Type**.
2. In the **Choose Drawing Type** window, under **Category**, click **Flowchart**.
3. Under **Template**, click **Basic Flowchart**.

Add shapes

Add shapes to your diagram by dragging shapes from stencils in the **Shapes** window onto the drawing page.

Drag shapes from a stencil

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

Delete shapes

Deleting shapes is easy. Just click the shape and then press the DELETE key.

Note   You can't drag shapes back onto a stencil in the **Shapes** window to delete them.

Delete a shape

- Click the last **Process** shape in your diagram, and then press the DELETE key.

Find shapes

You can look for more shapes on other stencils.

Open 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 (circle)** shape onto the drawing page and place it to the right of the first **Process** shape.
3. In the **Shapes** window, click the **Basic Flowchart Shapes** stencil title bar to show its shapes again.

Zoom in and out of the drawing page

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 (for example, a site plan or floor plan) you may need to zoom out to check the overall view.

Zoom in and out of the drawing page

1. To zoom in on the shapes in your diagram, click the **Pointer** tool, and then hold down the CTRL+SHIFT keys while you drag a selection rectangle around the shapes.

   The pointer changes to a magnifying tool, which tells you Microsoft Office Visio is ready to zoom in on the shapes.

2. To zoom out to check the overall look of your diagram, center the drawing page in the window, and press the CTRL+W keys.

Move one shape

Moving a shape is easy: just click any shape to select it, and then drag it to a new location. Selection handles appear when you click the shape.

Move one shape

1. With the **Pointer** tool, click the **Process (circle)** shape to select it.
2. Place the **Pointer** tool over the center of the **Process (circle)** shape.

   A four-headed arrow appears under the pointer, which tells you that the shape is ready to be moved.

   You don't have to place the **Pointer** tool exactly over the center of the shape; but it's a good habit to develop so you don't drag a shape handle and resize the shape by mistake.

3. Drag the **Process (circle)** shape next to the second **Process** shape.

   If you resize the shape by mistake, just undo your last action. (On the **Edit** menu, click **Undo**.)

   Note: 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.

Move multiple shapes

To move more than one shape at a time, you first select all the shapes you want to move.

Move more than one shape at a time

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.

   Alternatively, you could hold down the SHIFT key while you click each shape.

2. Place the **Pointer** tool over the center of any of the selected shapes.

   A four-headed arrow appears under the pointer, which tells you that the shapes are ready to be moved.

3. Drag the shapes down a little bit to make room for your diagram title.

   All the selected shapes move at once.

Resize shapes

You can resize shapes by dragging their corner, side, or bottom selection handles.

Note   Microsoft Office Visio shapes have other types of handles, as well, such as rotation and control handles. You'll learn about these handles in other lessons.

Resize a shape

1. With the **Pointer** tool   , click the **Process (circle)** shape.
2. Place the **Pointer** tool over a corner selection handle   .

   The pointer changes to a two-headed arrow   , which tells you that the shape can be resized.

3. Drag the selection handle inward to decrease the size of the shape.

Add text to shapes

You can add text to shapes. Just click a shape and begin typing; Microsoft Office Visio zooms in so you can see the text as you type.

Add text to shapes

1. Click the first **Process** shape on the drawing page, and then type 1.

   Alternatively, you could click the **Text** tool   , click the shape, and then type.

2. Click the second **Process** shape, and then type 2.
3. Click the **Decision** shape, and then type *3*.
4. Click the **Predefined Process** shape, and then type *A*.
5. Click the **Terminator** shape, and then type *B*.
6. Click a blank area of the drawing page or press the ESC key to exit the text mode.

Add independent text

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

Add independent text

1. Click the **Text** tool   .
2. Click the top of the page, and then type *123AB*.

Move independent text

You can move independent text as you move any other shape: just drag it. In fact, independent text is really just a shape with no border or color.

Move independent text

1. With the **Pointer** tool   , click the text.
2. Place the **Pointer** tool over the center of the text.

   A four-headed arrow appears under the pointer   , which tells you that the text can be moved, just like any other shape.

3. Drag the text to center it above your diagram.
4. Press the CTRL+W keys to zoom out and check the overall look of your diagram.

Format text

You can format text—italicize it, underline it, center it, and so on—the same way you format text in any Microsoft Office System program. You can use buttons on the toolbar or options in the **Text** dialog box (on the **Format** menu).

Format text

1. To show text formatting buttons, 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, and then drag a black selection rectangle that encloses all of the shapes.

   Everything within the selection rectangle is selected.

3. To increase the size of the text to 14 points, click the **Increase Font Size** button   on the **Format Text** toolbar four times.

Connect shapes with the Connector tool

You use the **Connector** tool to create connections.

Note   People new to Microsoft Office Visio often use the **Line** tool to connect shapes. Using the **Connector** tool is a much better method. When you use the **Connector** tool, connectors reroute, or bend, automatically when you move one of the connected shapes. When you use the **Line** tool to connect shapes, the connectors don't reroute.

Connect shapes with the Connector tool

1. To zoom in on the top two shapes, hold down the CTRL+SHIFT keys while you drag a selection rectangle around the shapes.
2. Click the **Connector** tool   .
3. Place the **Connector** tool over the connection point   on the bottom of the first **Process** shape.

   The **Connector** tool highlights the connection point with a red box   , which tells you that a connection can be made at that point.

4. Drag the **Connector** tool from the connection point on the first shape to the connection point at the top of the second **Process** shape.

   The connector endpoints turn red   when the shapes are connected. This is an important visual cue. If one of the connector's endpoints is still green   , use the **Pointer** tool to connect the endpoint to the shape. Both endpoints must be red if you want the shapes to stay connected.

5. To zoom out, press the CTRL+W keys.
6. Connect the rest of the shapes in the order shown in the animation (second **Process** shape to **Decision**, **Decision** to **Terminator**, **Decision** to **Predefined process**, and finally **Predefined process** to **Terminator**).

7. With the **Pointer** tool   , click the top **Process** shape to select it, move the shape to the right a little, and then move it back. Notice that the text moves with the shape and the connector reroutes and remains connected to the two shapes.

   The connector reroutes because you used the **Connector** tool to connect the shapes.

Connect shapes with connectors from stencils

You can also connect shapes with connectors from stencils. For example, in a block diagram, you can drag two-dimensional arrows from a stencil and connect them to boxes.

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.

   The **Line-curve connector** endpoint turns red   when it is connected to the **Process** shape. The other endpoint is still green because you haven't connected it to a shape yet.

2. Drag the other 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 turn red when the shapes are connected.

Add text to connectors

You can use text with connectors to describe relationships between shapes. Add text to connectors the same way you add text to any shape—just click a connector and type.

Add text to connectors

1. With the **Pointer** tool   , click the connector between the **Decision** and **Predefined process** shapes, and then type *A*.

   Microsoft Office Visio zooms 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 shapes between connected shapes

If you want to add a new shape between two connected shapes, you can. Just drag the new shape on top of the connector, and all three shapes automatically connect.

Note   This works in the flowchart, electrical engineering, and process engineering templates.

## Add a shape between connected shapes

- With the **Pointer** tool , drag the **Process (circle)** shape onto the connector between the **Predefined process** shape and the **Terminator** shape.

  Microsoft Office Visio connects the **Predefined process** shape to the **Process (circle)** shape, and the **Process (circle)** shape to the **Terminator** shape.
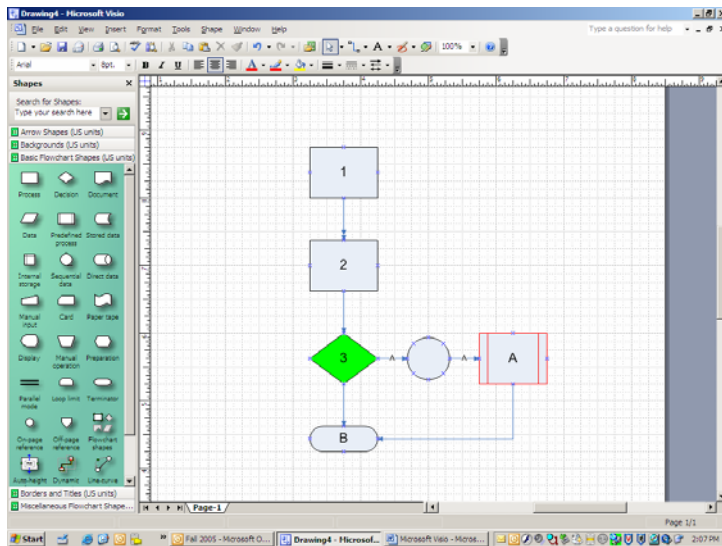
Format 2-D shapes

1. To change the color of the **Decision** shape, click it, click the **Fill Color** button   on the toolbar, and then click **Bright Green**.

   Alternatively, on the **Format** menu, click **Fill** 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   button on the toolbar, and then click **Red**.

   Alternatively, on the **Format** menu, click **Line** to change the line color, thickness, or pattern.

Format a 1-D shape

- To change the line pattern of the **Line-curve connector** shape, click it, click the **Line Pattern** button   on the toolbar, and then select a dashed line.

  Alternatively, on the **Format** menu, click **Line** to change the color, thickness, pattern, or ends.

Change how shapes look with control handles

Some shapes have control handles you can use to change the shape appearance. For example, a control handle might rotate a shape, move the lines inside a shape, increase the size of a pie chart slice, or change the location of the text associated with the shape.

Change how shapes look with control handles

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.

Save diagrams

After you finish a diagram, you can save it the same way you save a file created in any Microsoft Office System program.

Note   It's a good idea to periodically save your diagram as you work.

Save a diagram

1. On the **File** menu, click **Save As**.
2. In the **File name** box, type *Flowchart*, and then click **Save**.

Preview and print diagrams

Before you print a diagram, you can preview it to ensure it will print correctly. In the **Print Preview** window, the gray boundary indicates the drawing page margins and edge of the printed page. Shapes that overlap this boundary won't print completely. Either move them or adjust your drawing page or printer settings, such as orientation, size, or margins. (To adjust page or printer settings, on the **File** menu, click **Page Setup**.)

Preview and print a diagram

1. On the **File** menu, click **Print Preview**.

   Alternatively, you can click the **Print Preview** button   .

2. On the **File** menu, click **Print**.

   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, on the toolbar, click **Close**.

Create Organizational Charts

Open the Organization Chart template

The **Organization Chart** template opens several stencils including the **Organization Chart Shapes** stencil, which contains all the shapes you need for any size organization chart.

The **Organization Chart** template also includes the **Organization Chart** menu and toolbar, which provide tools to help you lay out, synchronize, hide, and move the shapes in your chart, plus other tools to help you create, manage, import, and export organization information.

Open the Organization Chart template

1. On the **File** menu, point to **New**, and then click **Choose Drawing Type**.
2. Under **Category**, click **Organization Chart**, and then under **Template**, click **Organization Chart**.

Add the first shape to an organization chart

The first shape you add to an organization chart is the top shape in the hierarchy, which usually represents an executive. However, it could represent a manager or project leader if you're creating an organization chart for a single department or team.

Add the first shape to the organization chart

1. From the **Organization Chart Shapes** stencil in the **Shapes** window, drag an **Executive** shape onto the drawing page.
2. As you drag the shape onto the drawing page, the **Connecting Shapes** dialog box may appear. Select the **Don't show this message again** check box, and then click **OK**.

Create organization hierarchies

You connect the shapes and create the organization hierarchy in an organization chart by dragging shapes on top of each other.

For example, when you drag a **Position** shape on top of a **Manager** shape, Microsoft Office Visio places the **Position** shape below the **Manager** shape and connects the two.
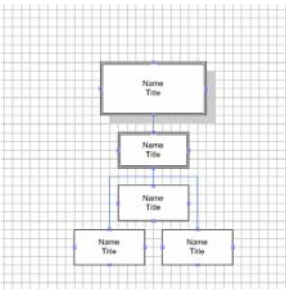
Create the organization hierarchy

1. From the **Organization Chart Shapes** stencil in the **Shapes** window, drag a **Manager** shape onto the **Executive** shape on the drawing page.

   Visio arranges and connects the two shapes.

2. Drag three **Position** shapes, one at a time, as shown in the animation, on top of the **Manager** shape on the drawing page.

   Visio arranges the **Position** shapes below the **Manager** shape and connects them to the **Manager** shape.

3. To change the layout of the shapes below the **Manager** shape, click the **Manager** shape. On the **Organization Chart** toolbar, click the **Horizontal Layout** button   , and then click the **Stagger** button   .

Note: You can show employee photographs and other information, such as telephone number and e-mail address, in your organization chart shapes. To show an employee photograph, right-click a shape, and then click **Insert Picture** on the shortcut menu. To show more employee information, on the **Organization Chart** menu, click **Options**. In the **Options** dialog box, click the **Fields** tab, and then specify the information you want to show and where you want to show it.