Introduction to Visio 2003

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Summer 2005

Introduction

This tutorial is designed for people who are new to Visio. Visio is a drawing and diagramming program that helps transform concepts into a visual representation. Visio provides you with pre-defined shapes, symbols, backgrounds, and borders. Just drag and drop elements into your diagram to create a professional communication tool.

For the purposes of this tutorial, we are going to focus on how to create a flowchart diagram, and then briefly show how a wire frame for web design and an organization chart might look when drawn in Visio. But Visio also provides the tools to create many other types of diagrams, such as charts and graphs, project schedules, and web diagrams. Be sure to browse the Visio template gallery for samples.

Currently, Visio is available on all of the PCs in the iSchool Lab. The program can also be purchased at the Campus Computer Store for about \$57. An alternative program is OmniGraffle, also currently available on all of the Macs in the iSchool Lab. Another alternative is Dia, an open source diagramming program currently available on all of the PCs in the lab, and available for download at http://www.gnome.org/projects/dia/.

Objectives

After completing this tutorial, you will have learned how to:

- Open a new Visio document
- Create a flowchart diagram using shapes and connectors; move or add shapes
- Add text to a diagram and format the text
- Create a background
- Modify the color palette
- Add a hyperlink
- Print a diagram or insert it into a PowerPoint or Word document
- Edit a diagram while remaining in PowerPoint or Word

Getting Started

- Step 1: To open a new Visio drawing, go to the Start Menu and select Programs→ Visio (Figure 1).
- Step 2: Move your cursor over "Business Process" and select "Basic Flowchart"

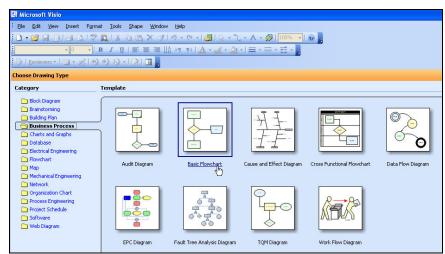


Figure 1

Navigating in Visio

Let's take a few moments to get familiar with the Visio interface (Figure 2).

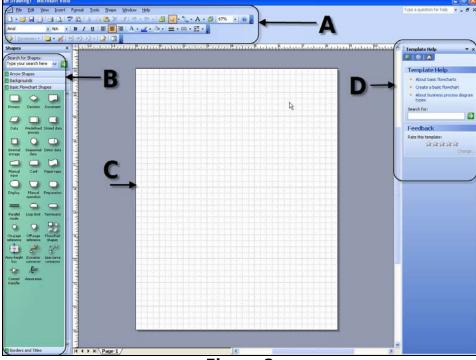


Figure 2

A: the toolbars across the top of the screen are similar to other Microsoft programs such as Word and PowerPoint. If you have used these programs before, you may notice a few different functionalities, which we will explore later.

Selecting Help→Diagram Gallery is a good way to become familiar with the types of drawings and diagrams that can be created in Visio.

B: the left side of the screen shows the menus specific to the type of diagram you are creating. In this case we see:

- Arrow Shapes
- Backgrounds
- Basic Flowchart Shapes
- Borders and Titles

C: the center of the screen shows the diagram workspace, which includes the actual diagram page as well as some blank space adjacent to the page.

D: the right side of the screen shows some help functions. Some people may choose to close this window to increase the area for diagram workspace, and re-open the help functions when necessary.

Creating a new diagram

- Step 1: Select a shape from the Shapes menu, and drag it to the workspace.
- Step 2: On the toolbar, click the connector tool (Figure 3). The connector tool will appear highlighted, and will remain active until it is deselected.



Figure 3

- Step 3: With the first shape still selected, drag a second shape to the workspace. The shapes are connected automatically when the connector tool is turned on.
- Step 4: Continue adding shapes until you have enough to include all of the steps in the business process being outlined. The example on the next page illustrates a ten step process (figure 4).
- Step 5: Shapes can be resized or moved, and the connectors will remain intact. At this point, your diagram should look something like the following example (figure 4).

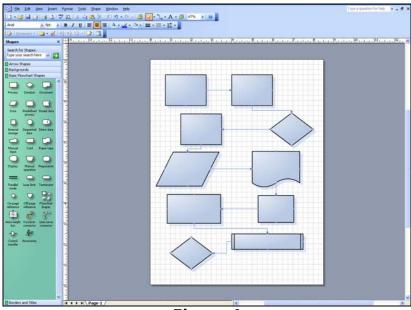


Figure 4

Adding text to a diagram and formatting the text

- Step 1: Double click on a shape to enter text. There is no need to create a text box (as required with Microsoft Word or PowerPoint shapes); Visio does this automatically for you (Figure 5). (Visio does still support the creation of text boxes outside of shapes).
- Step 2: The default format for text in Visio is Arial 8-point font. The most efficient way to format is to enter all of the text, then format all of the shapes at once.

To do this, click on one of the shapes to select it. Hold down the Shift key, and click on the other shapes you wish to format (Figure 6).

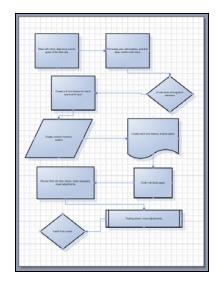


Figure 5: Add text

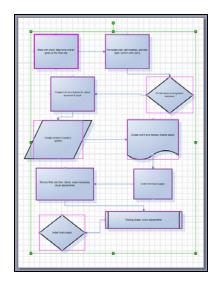


Figure 6: Select text to format

Step 3: With the text selected (Figure 7-B), choose the font, style, and size you would like to use from the tool bar (Figure 7-A).

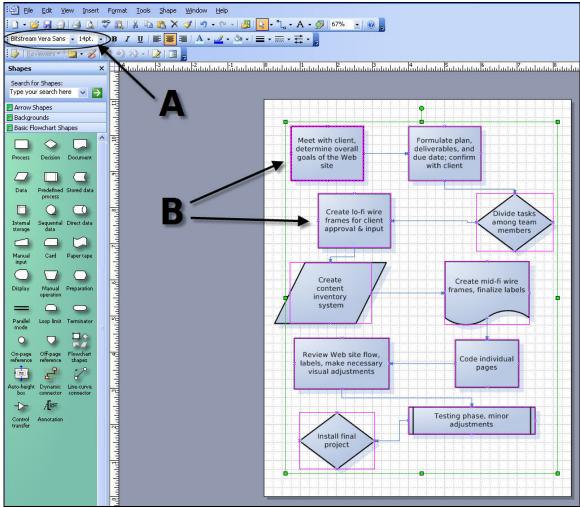


Figure 7

Adding shapes to a formatted diagram

If you realize that you forgot a step in your diagram, Visio provides a fairly simple solution to this problem. Simply select another shape, drag it to the diagram, and pause over the connector where you would like to insert the shape. When the scissors icon appears (figure 8), drop the shape, enter the text, and format it to match your diagram.

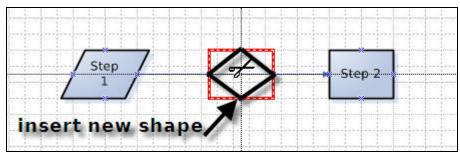


Figure 8

Creating a background

Visio provides several standard backgrounds which you can add to your diagram.

Step 1: From the menu on the left side of the screen, click on "Backgrounds" (Figure 9A).

Step 2: Click on a design, drag it over your drawing, and drop it.

You will notice that Visio has added a tab at the bottom of the drawing. One tab is labeled "Page-1", and the second is labeled "VBackground" (Figure 9B). For the most part, you will be working with Page-1, but you always have the option to add content to the background page as well. The important thing to remember is that whichever page you add content to is the page you need to do your editing on.

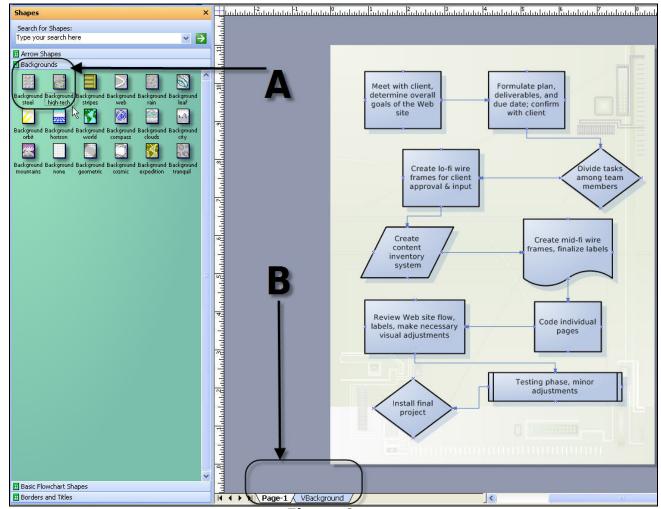


Figure 9

Modifying the color scheme

The most efficient way to add color to your drawing is to use the color scheme functionality, which will change your shapes, background, and text all at once.

Step 1: Right-click on your workspace and select "Color Schemes" (Figure 10).

Step 2: The color scheme menu will open, select a scheme from the menu and click apply. Preview different color schemes, then select "OK" when you find one you like (Figure 11).

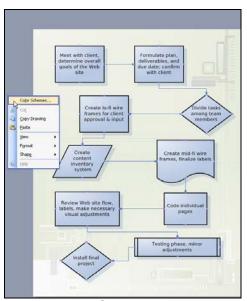


Figure 10

Figure 11

Step 3: Sometimes you need to change the color of one or two shapes for impact. To do this, select the shape you wish to change (Figure 12A), then click on the paint bucket tool, located in the formatting toolbar. Select a color by clicking on it, and only the shape you selected will change.

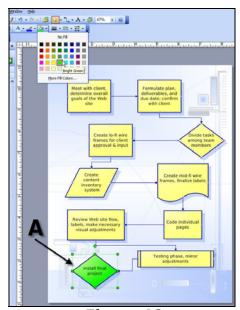


Figure 12

Adding a Hyperlink

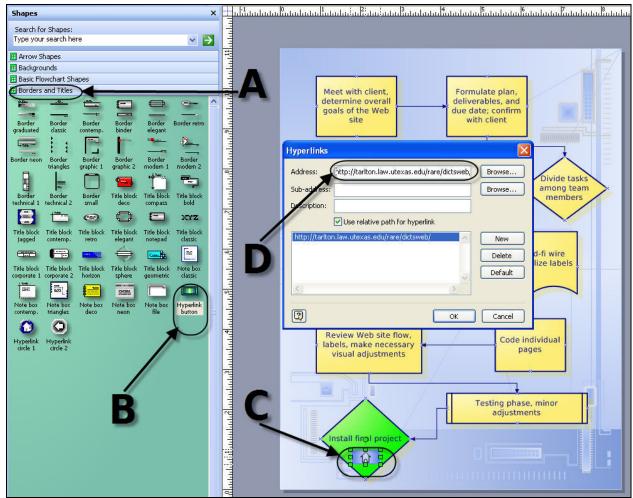


Figure 13

- Step 1: Select the "Borders and Titles" tab (Figure 13A) on the left side of your screen.
- Step 2: Select one of the "Hyperlink" icons (Figure 13b), drag it to your diagram, and drop it in the shape where you would like your hyperlink to appear (Figure 13C).
- Step 3: Visio will open up a hyperlink dialog box, just type in the URL you would like to link to (Figure 13D).

What to do with your Visio drawing

Visio drawings can be printed out just like any other Microsoft document.

From the toolbar, select File→Print.

Visio drawings can also be inserted into other Microsoft Office documents such as PowerPoint or Word.

Step 1: From the Visio toolbar, select Edit→Copy drawing.

Step 2: Open your PowerPoint presentation (or Word document), and

position your cursor where you would like to insert the Visio

drawing.

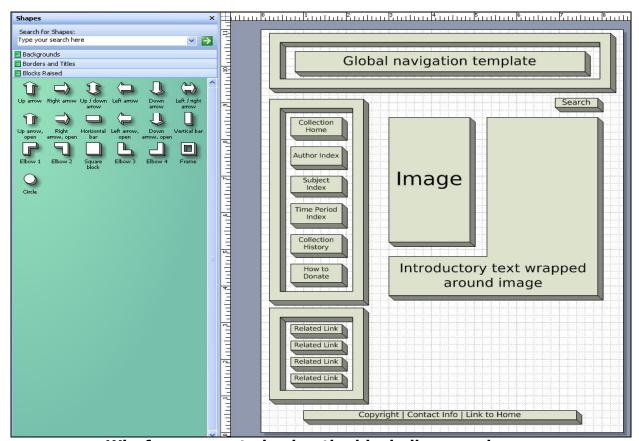
Step 3: Select Edit→Paste.

Step 4: To change your drawing, double click on it (while still in PowerPoint

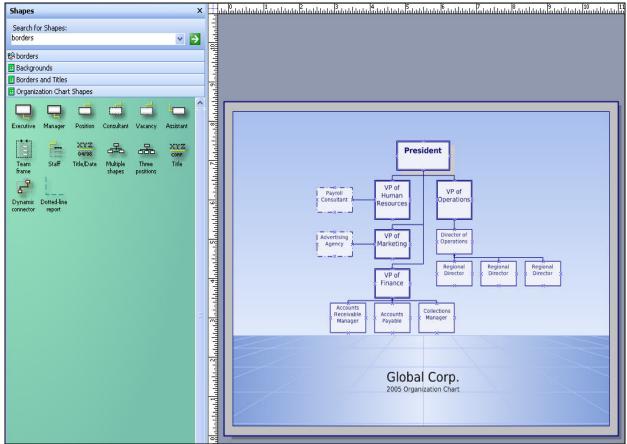
or Word), and Visio will open within PowerPoint or Word for what is called in-place editing. There is no need to go back to the original

drawing, edit, and repeat the Copy→Paste steps.

Other types of Visio drawings



Wireframe, created using the block diagram shapes



Organization Chart

Resources

http://www.microsoft.com/office/visio/prodinfo/fag.mspx

http://www.boxesandarrows.com/