

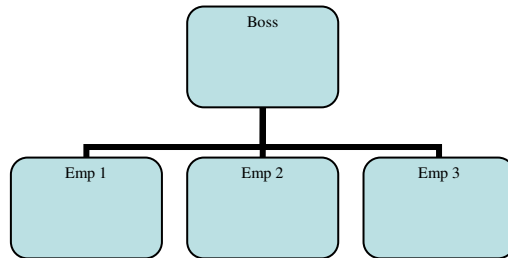
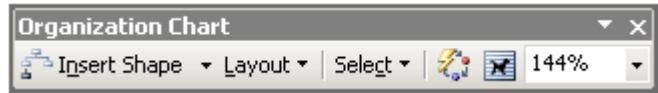
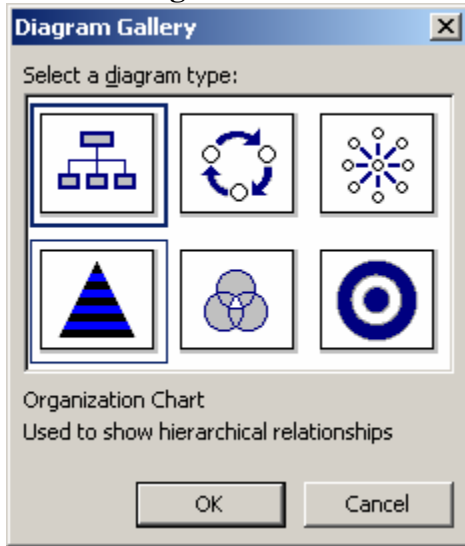
VISIO – Flow Charts / Gant Charts

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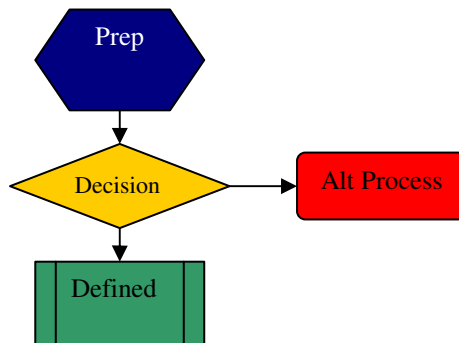
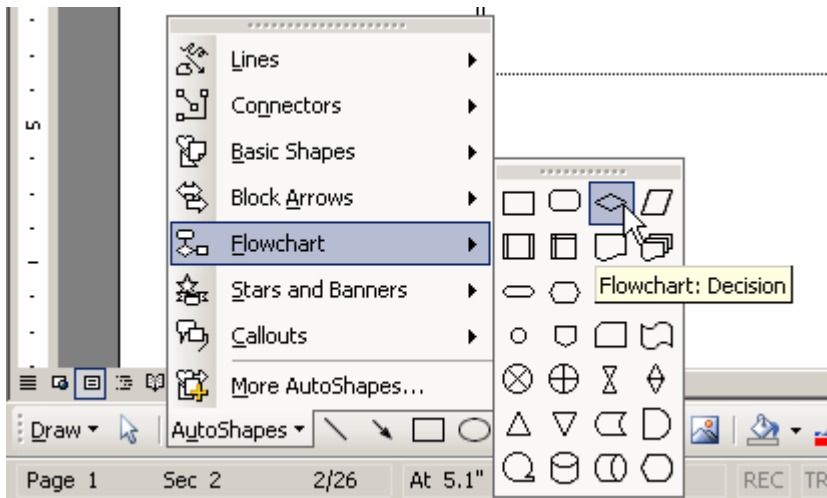
Office Charting Tools

Simple needs – use a simple program.
WORD / EXCEL / PowerPoint;

Insert > Diagram



Drawing Toolbar – Objects & Connectors, Align & Distribute



Templates

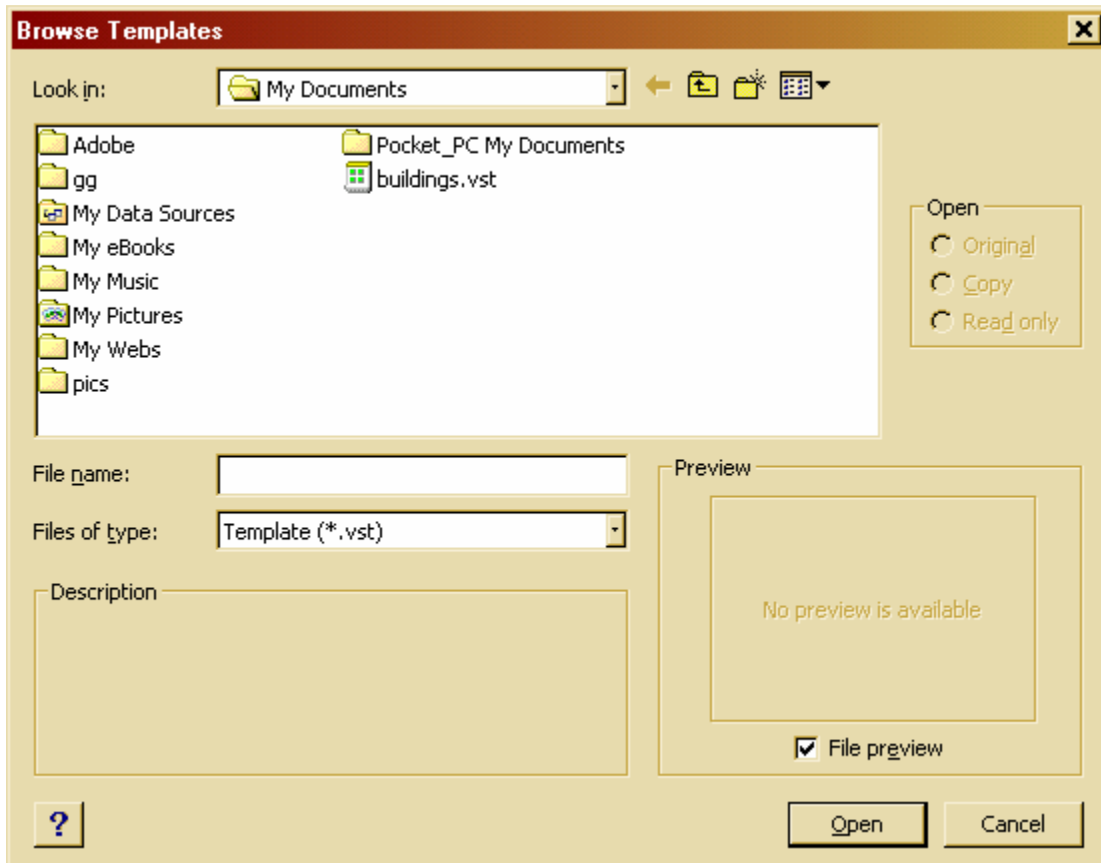
File – Page setup... paper, scale, etc.

File – Stencil – Open – open stencil(s) you use most often – Isometrics / company standard objects / custom / favourites

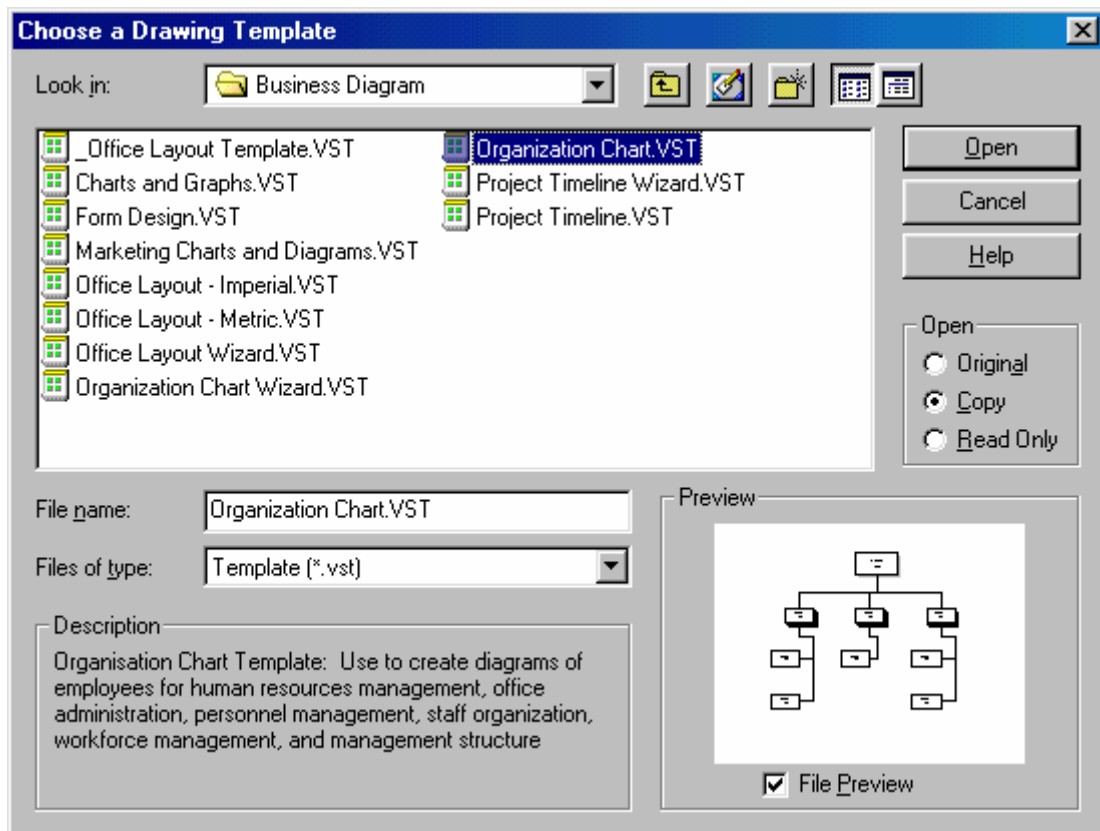
Set your drawing scale! – File – Page Setup – Scale – especially for architectural objects.

File – Save as – Type – Template – over write the blank document – becomes your startup template.

- 1) Choose a Drawing Template: “Look in: Solutions” Flowchart Wizard vs Template “Audit”
- 2) Drag & Drop items onto sheet
- 3) Use toolbar icons to connect the objects



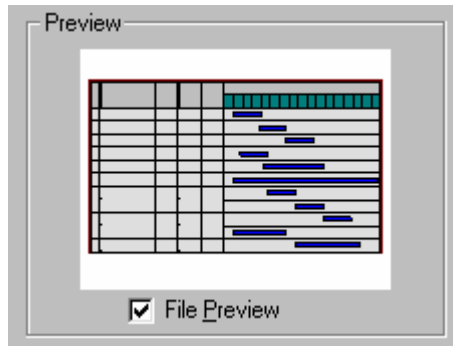
Business Diagrams



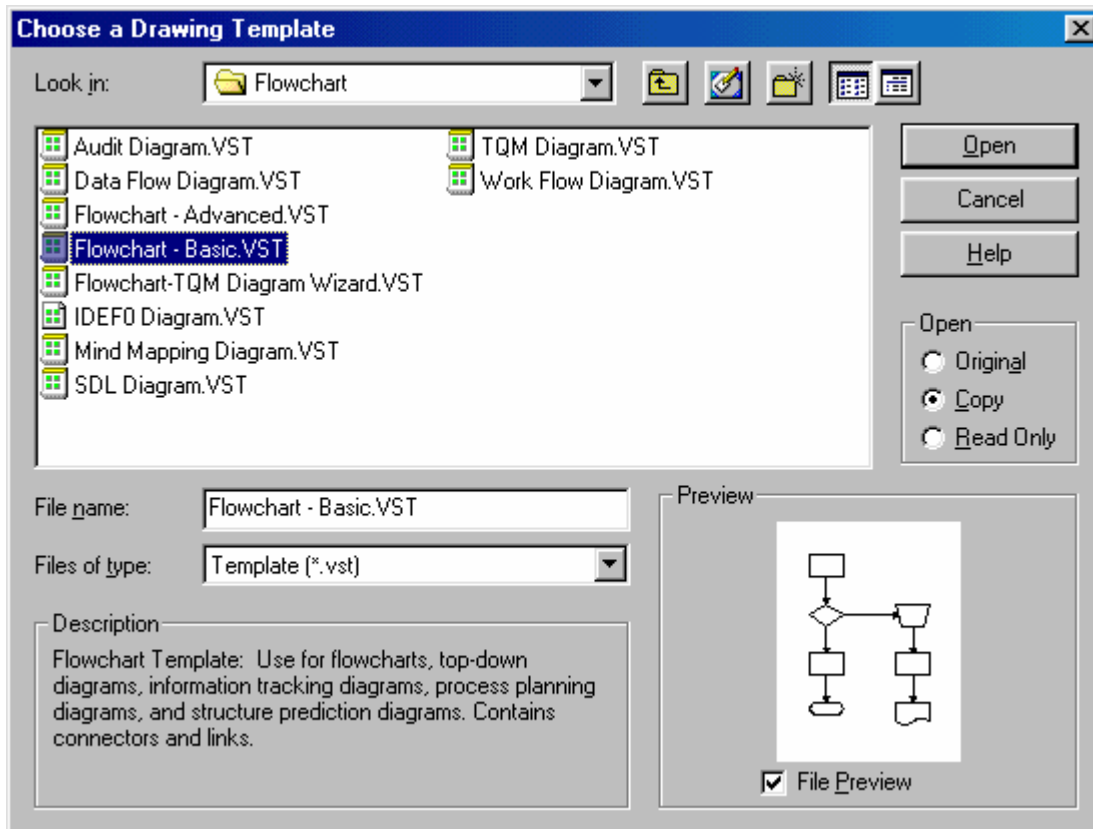
Organizational charts can be created from data automatically, if each employee's supervisor is somehow identified (best to have employee job designated to supervisor job, so as names change into a role – the supervisor is dynamically defined)

This is just a “good to know” topic – the IT department would have to be involved in setting up the relationships and automation.

Time Line (MS Project is much better)



Flowcharts

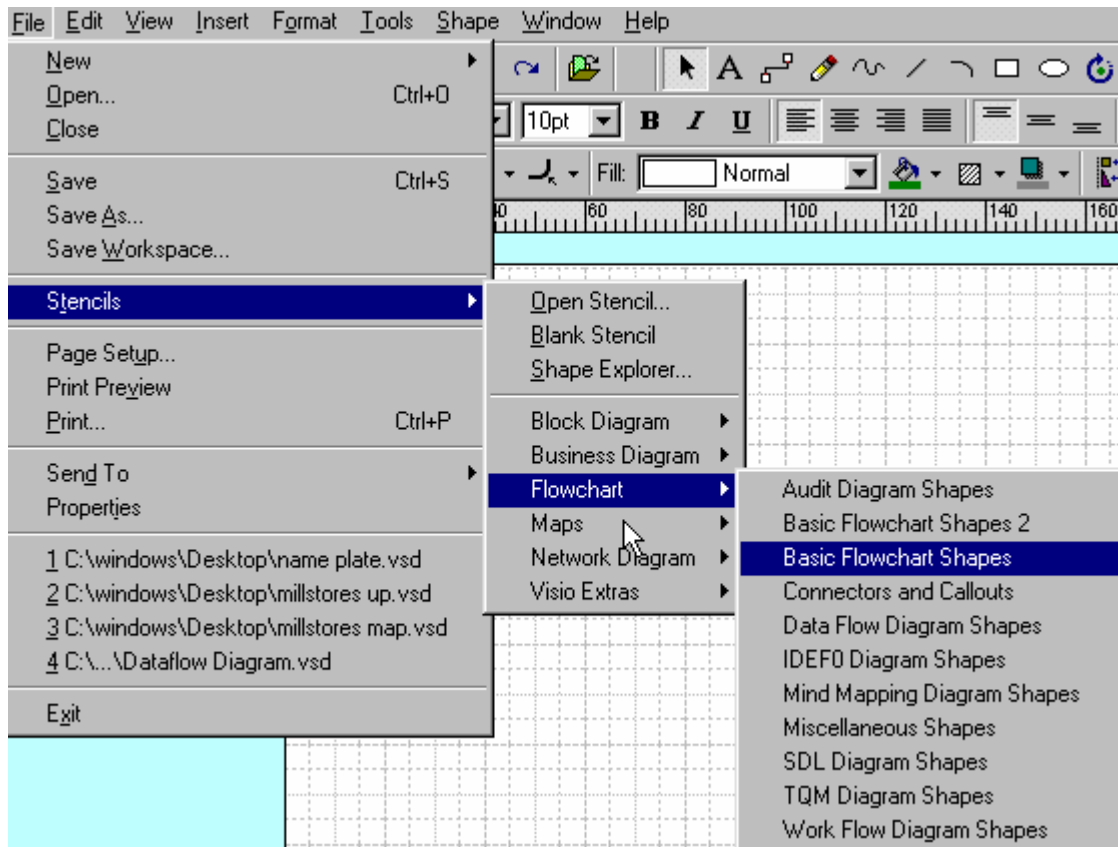


Maps



Stencils

From any Template – can call up any ‘Stencil’




or File – Stencils...

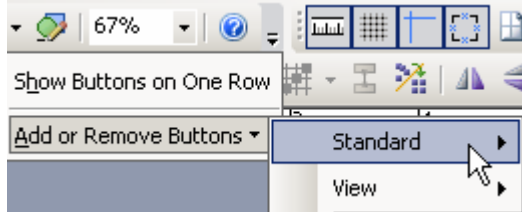
Basic Drawing Skills

The screenshot shows a software interface for creating flowcharts. On the left is a toolbar titled "Flowchart (Additional)" containing 36 icons for various flowchart symbols such as "Tagged process", "Lined/Shaded process", "Tagged document", "Lined document", "Transmittal tape", "Off-page connector", "Variable start", "Variable procedure", "Create request", "Summing junction", "Collate", "Sort", "Or", "Off-line storage", "Open rectangle", "Drum storage", "Data store", "Database", "Primitive from call", "Primitive to call control", "Message from user", "Message to user", "Output", "Feedback", "Check", "Check 2", "And gate", and several arrow symbols.

Two examples are shown on the right:

- Drag and Drop object onto drawing area:** A grid with several flowchart symbols (rectangle, cylinder, triangle, rectangle with lines) placed on it. A mouse cursor is shown hovering over one of the rectangles.
- Can use line tools to connect objects by their X points:** The same symbols are connected by lines. A line connects the right side of a rectangle to the left side of a cylinder. Another line connects the bottom of the cylinder to the top of a triangle. A curved line connects the bottom of the rectangle to the top of another rectangle. A wavy line connects the right side of the second rectangle to the left side of a third rectangle. A line connects the bottom of the first rectangle to the top of a square. A line connects the top of the square to the bottom of the second rectangle. A line connects the bottom of the second rectangle to the top of the third rectangle. A line connects the bottom of the third rectangle to the top of a square. A line connects the top of the square to the bottom of the first rectangle. A line connects the bottom of the first rectangle to the top of a square. A line connects the top of the square to the bottom of the second rectangle. A line connects the bottom of the second rectangle to the top of the third rectangle. A line connects the bottom of the third rectangle to the top of a square. A line connects the top of the square to the bottom of the first rectangle.

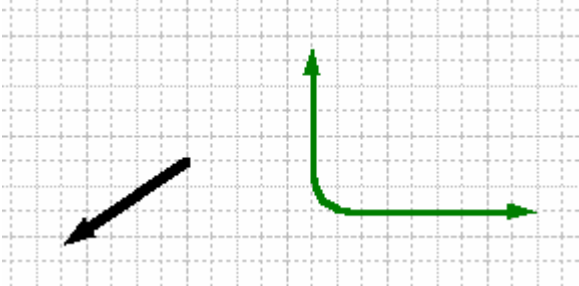
Either drag & Drop items onto drawing – or activate stamp tool icon  to be able click where you want the object centered (great for multiples) or [Ctrl]drag or [Ctrl][d]



Line Settings



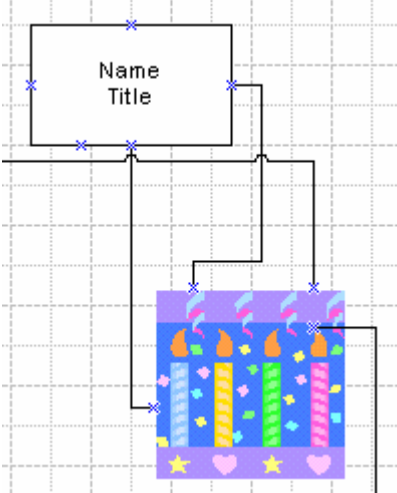
Type / Colour / Thickness / Style / Arrow Head / Curvature



Modify Connection Points



[Ctrl] click to add connection point to an object



Move / [delete] / Copy with [Ctrl] drag or duplicate =[Ctrl][d]

Undo = [Ctrl][z]

Constrain = [Shift] held down – to move / draw



Connect Shapes - Auto (order you select multiples with [Shift] is the order they are connected) (In Actions toolbar)

Basic Object Skills

Move = click & drag

Constrain = [Shift] ; to draw straight lines / perfect squares or circles / proportionally re-size objects / constrain movement to one axis – horizontal or vertical, depending on first movement direction...

Object Fill



Copy = [Ctrl] drag or [Ctrl][d] or Rt click – Copy then Rt Click - Paste

Format Painter (Copies formatting)



Select what you like – paint onto what you want the same format

Double click tool to lock it – for multiple paintings – click to unlock it

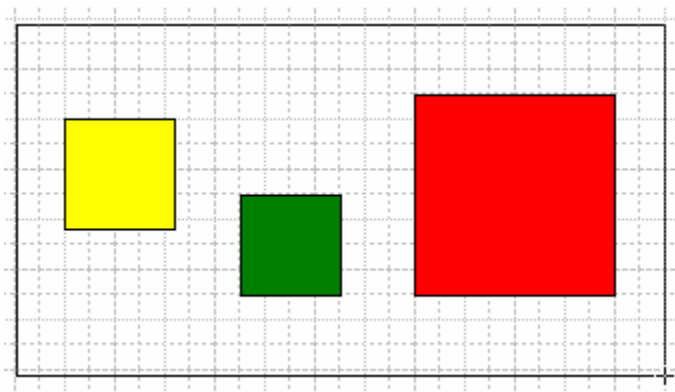
Resize = drag pick points on edges of selected object or corners to keep dimensions

Delete = [Delete]

Select Multiples = [Shift] click additional objects – again to un-select

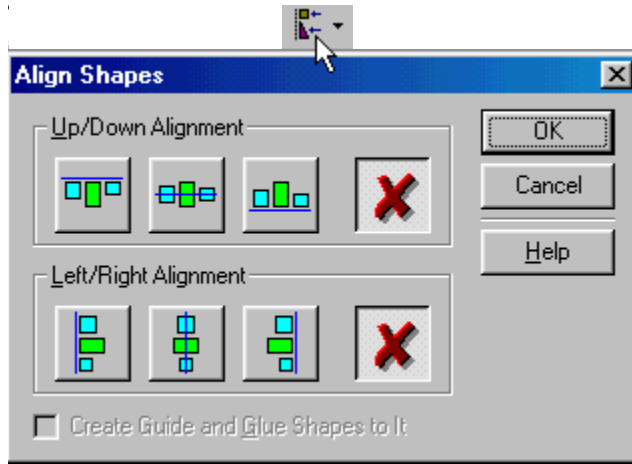
Select All = [Ctrl] [a]

Select Multiples = selection box – Click & drag in empty space to draw a selection box

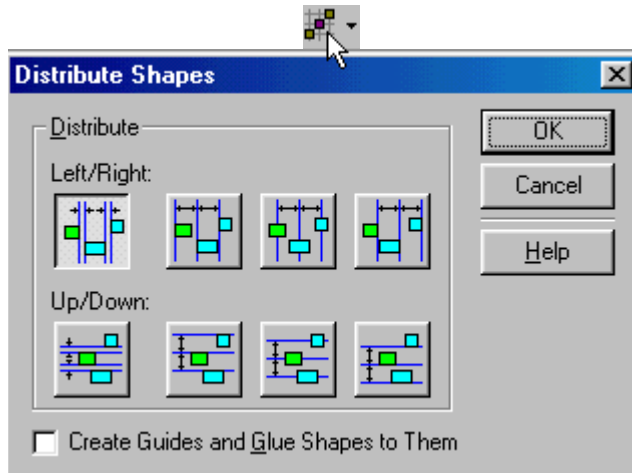


Align & Distribute

Align Multiples by their edges = *TOOLS – ALIGN* or icon



Distribute (space evenly) – vertically or horizontally



Size & Position

In Status Bar – you can see the size of an object



Right click object(s) - View – Size & Position Window

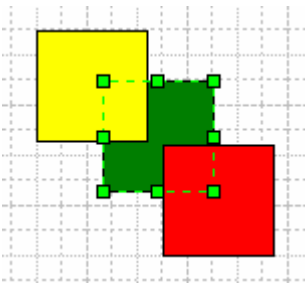
X	5.5 in.
Y	5.875 in.
Width	2 in.
Height	0.5 in.
Angle	0 deg.
Pin Pos	



Size & Position

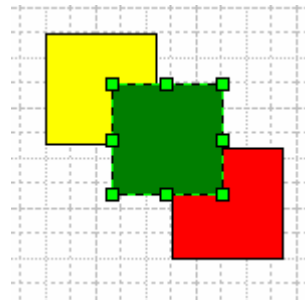
When done with it, just X the corner to close the Window

Note: should size first before alignments and Distributions

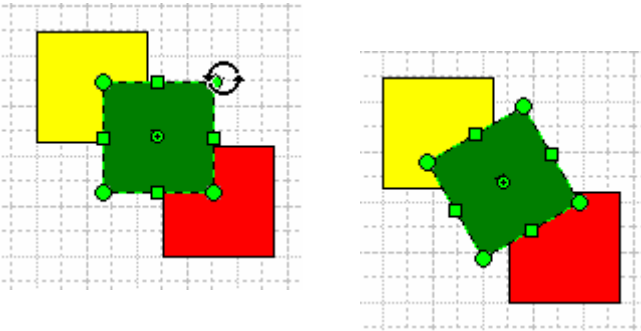
Arrange Objects



Right click – shape – bring to front or  send to back is 



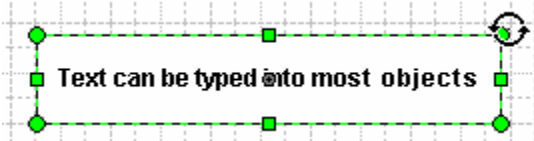
Rotate Object



Click and drag to rotate freely or flip



Rotate Text



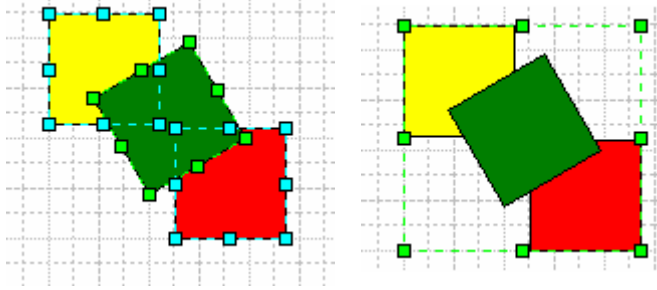
Object rotate for text inside objects – text rotate for basic text boxes

Text box – vertical text – just resize text box to squish it vertically

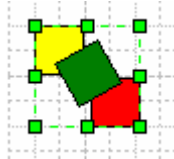


Grouping

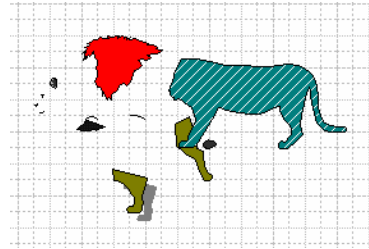
Select objects



Rt click – shape – group or  and  to un-group



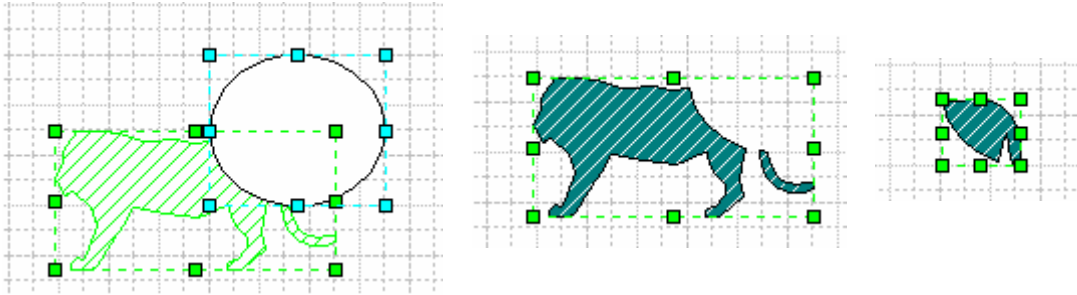
Can resize / move as one object
Insert – Clipart... Try ungrouping a clipart



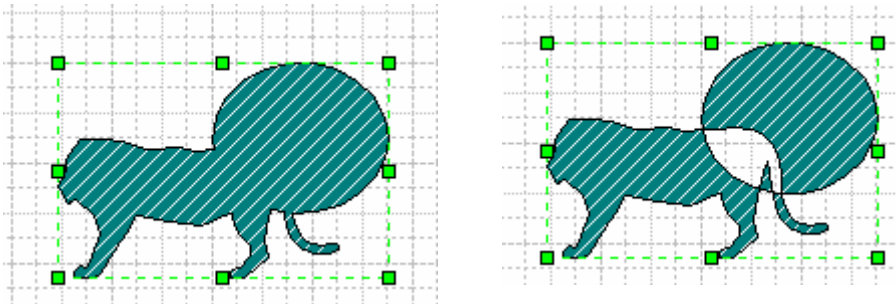
Note: VISIO 2003 deals with cliparts properly. If UN-Grouping in an older version of VISIO damages the clipart, un-group in Word or PowerPoint. Manage the object, then Rt click – cut – Rt click paste into VISIO...

“Shape Math”

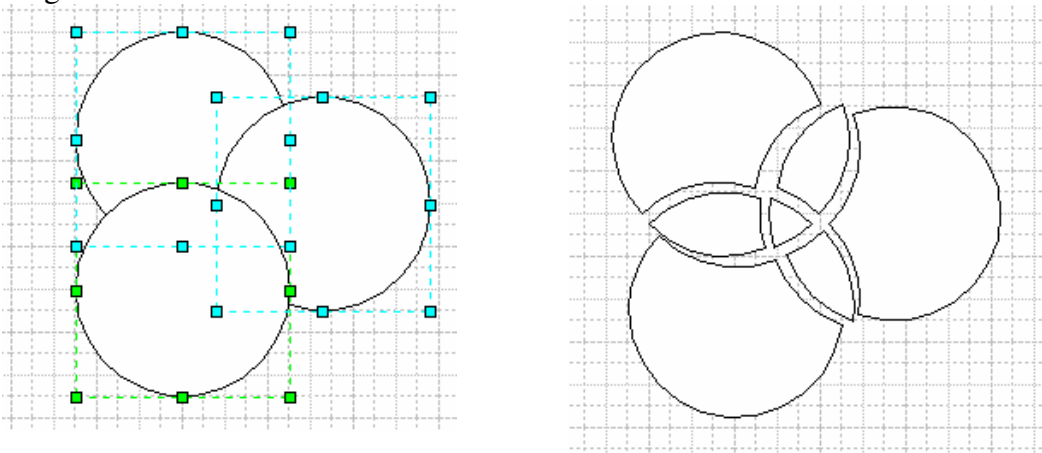
Shape – Operations –
Subtract vs Intersect



Add = Shape – Operations – Union vs Combine

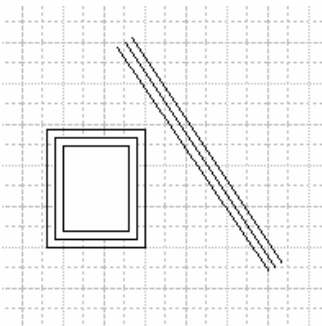


Fragment



Offset

Draws another on either side of object – offset by amount desired



Stencils - Edit

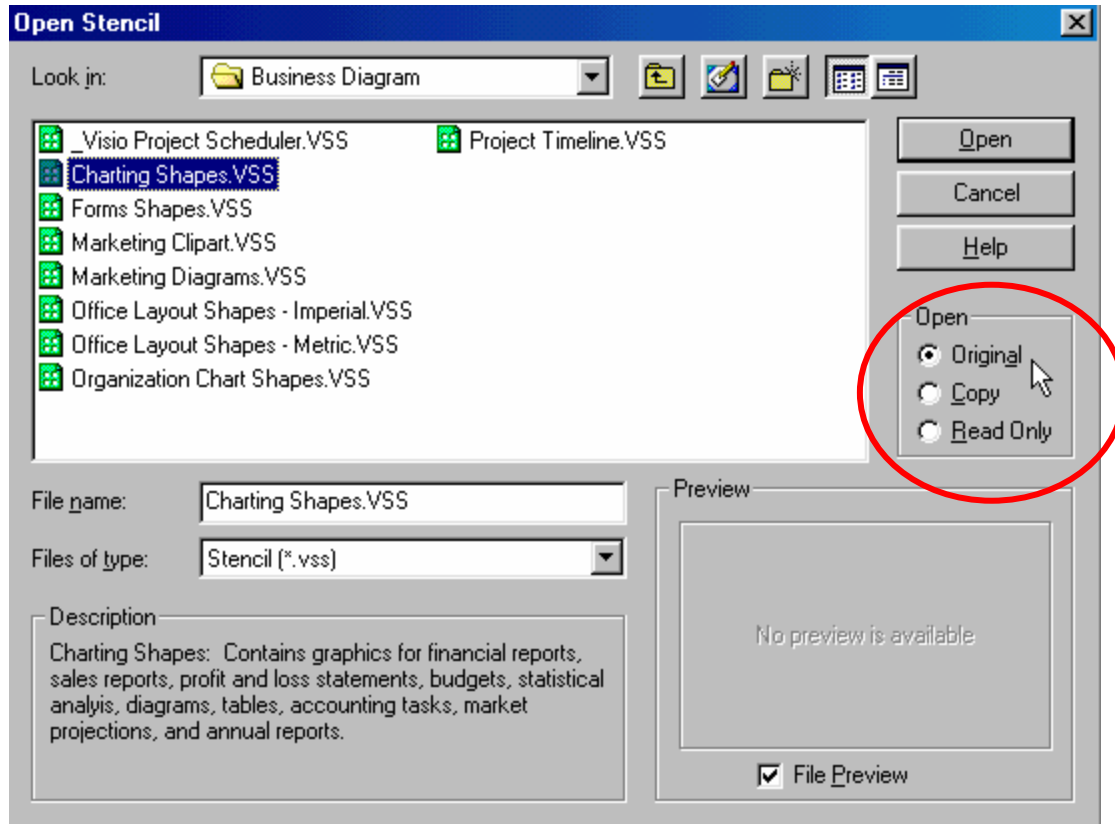
Close all open files – because when you go into edit mode, it will tile all open Windows...

File – Shapes – Open Stencil – takes you to “My Shapes”

Other stencils are in the application directory.

Older version of VISIO;

Can add/remove from a stencil (if open it in ‘original mode and you have edit rights)

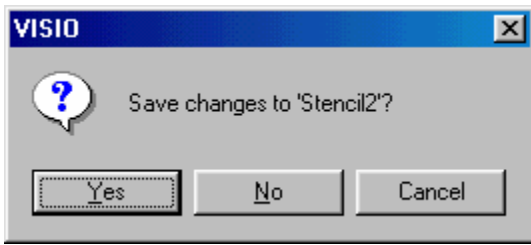


Stencils - custom

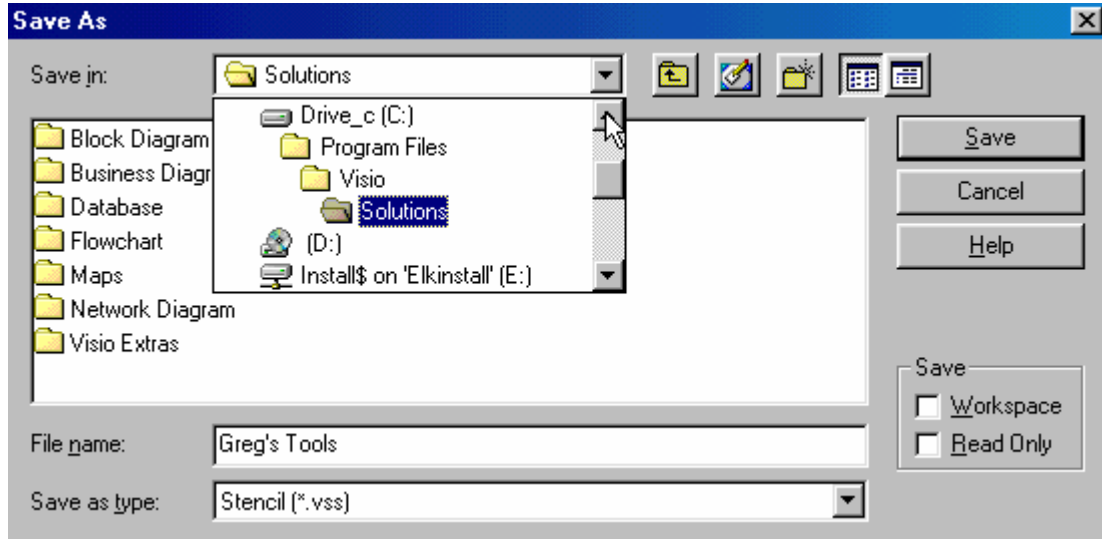
File – Stencils – Blank

Can create a new stencil – **blank** – that you drop your own built objects / lines to...or create one for your favourite objects from other stencils...

Drag your object(s) to it – when you exit it – save to the stencil folder if you want –

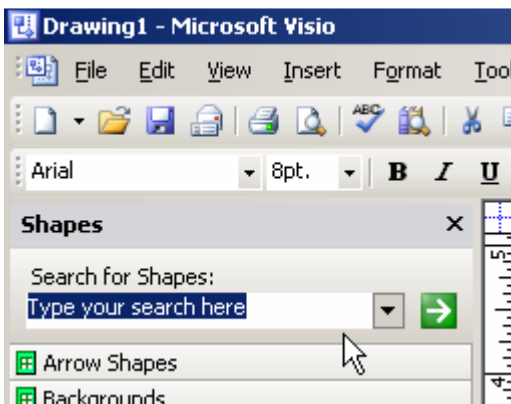


C:\Program Files\Visio\Solutions – where stencils are normally installed but on network drive, would be backed up for you...



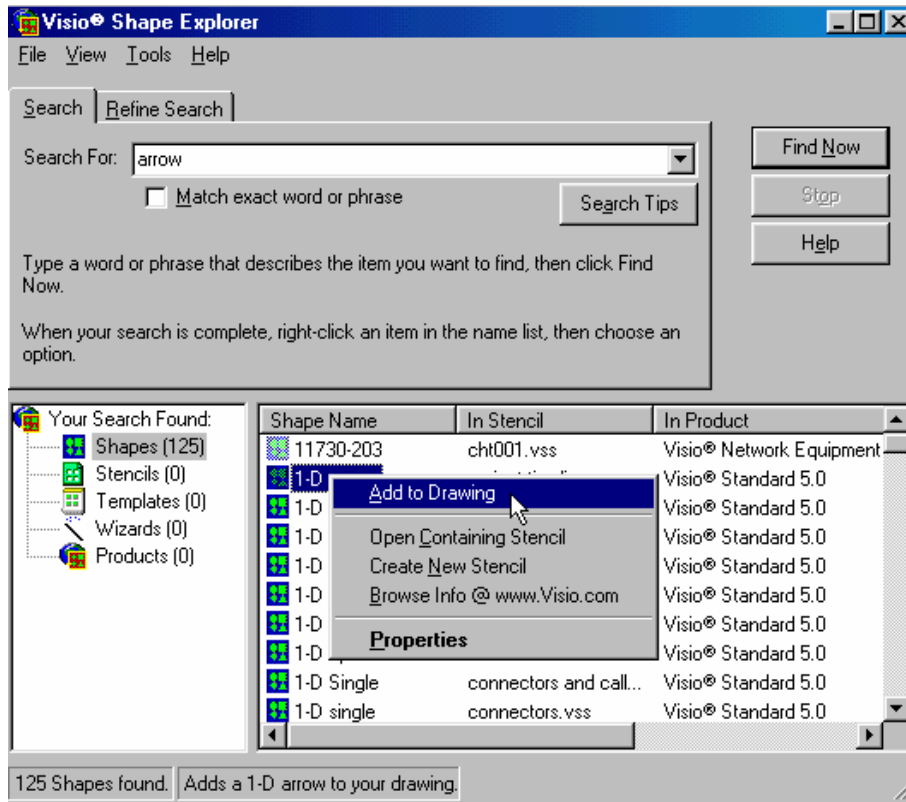
Can add stencils – ex. One for “Isometric” shapes... “Technical” Stencils... Just copy the .vss file(s) into My Documents \ My Shapes folder.

Find Shapes



Older VISIO;
Tools > Macros >- Shape Explorer... (It may not be installed)

Grayed out – not installed



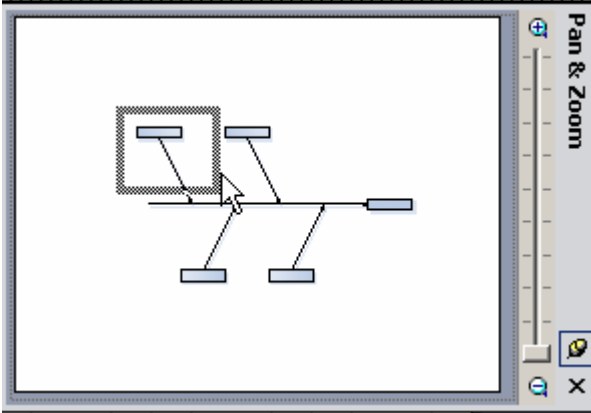
Right click – add to drawing or bring up that stencil


Zoom & Layers

Zoom in / out or [Shift][Ctrl] with Left click / Right Click or [Ctrl] wheel mouse

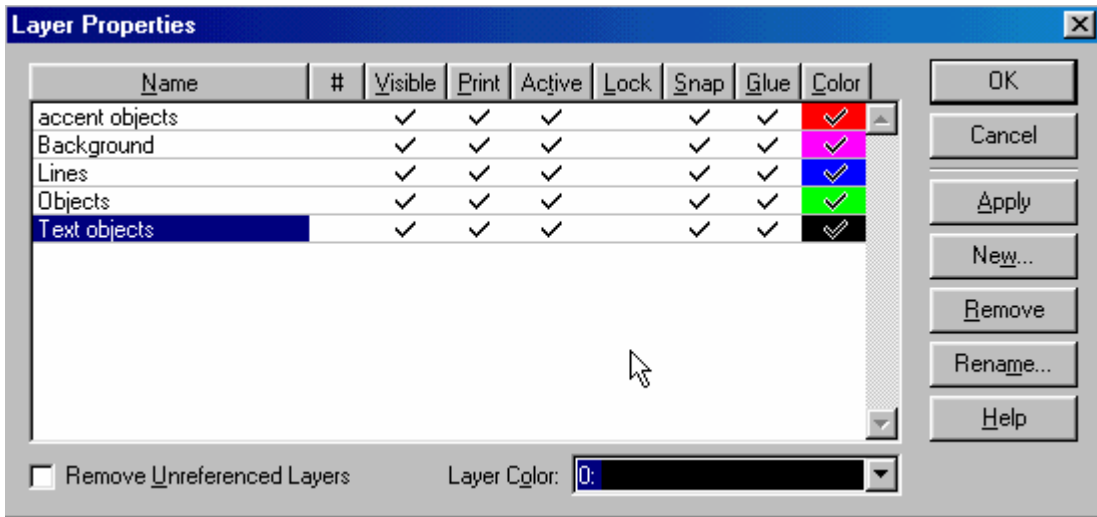


Pan & Zoom Window – you can select area to zoom to;



Layers  (In VIEW toolbar – right click toolbar to activate it)

or View – Layer Properties



Show / hide

Easily select objects – hide other layers!

Print layers desired

Draw objects – select objects – assign a layer to them

Select object(s) – assign to layer -  - will take on that layers properties

Can hide / print / lock / etc.

Remove Unreferenced Layers – any layer with no objects assigned are removed.

External Objects

Insert – Clipart

Picture – from file

Shape –explorer – Right click – add to drawing... copy to your stencil if desired

Copy object – Paste into VISIO

Data links...setup the data file in Excel or text file according to Visio's requirements

Task#, Task Name, Duration, Start Date, End Date, Dependency, Resource

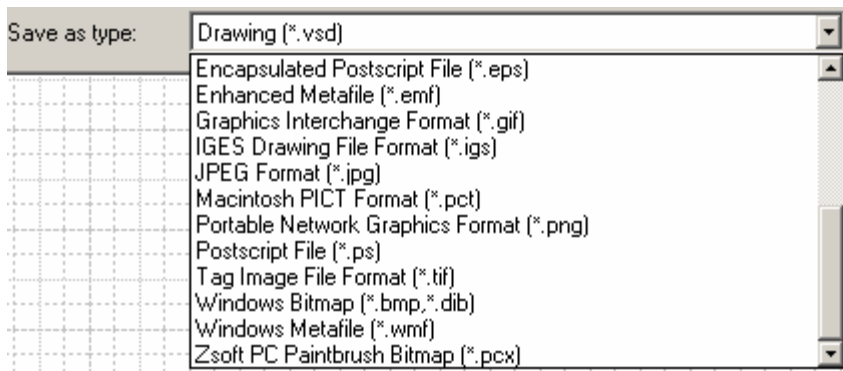
File – New – Business diagram – Timeline Wizard

See help on Creating Project Timelines from Data Files

EXPORT

File – Save as...

GIFs can store up to 256 colours, and are great for line drawings (low file size)

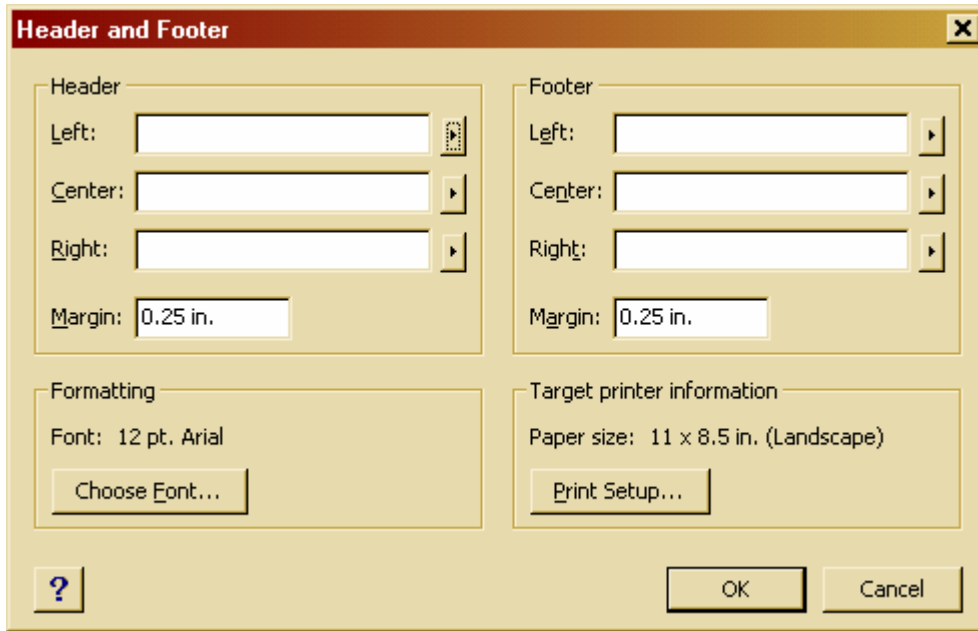


or Select All = [Ctrl][a] then Edit – Copy – Edit paste will paste as a VISIO Object , like Insert – Object...

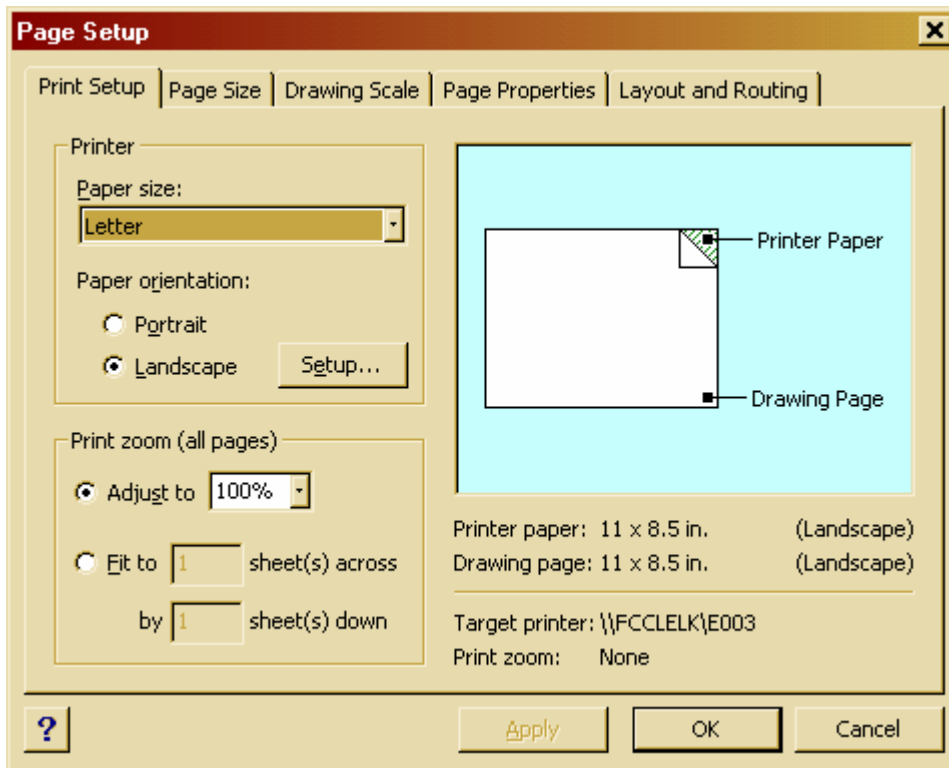
or Edit – Paste Special – as Picture (Enhanced Metafile) (person does not require VISIO to view it)

Headers & Footers

View – Headers & Footers..



Page Setup



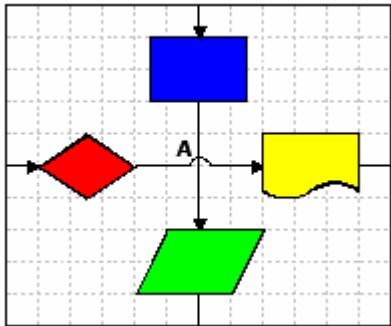
Shape > Center Drawing

Simply forces your drawing to be centered on the page.

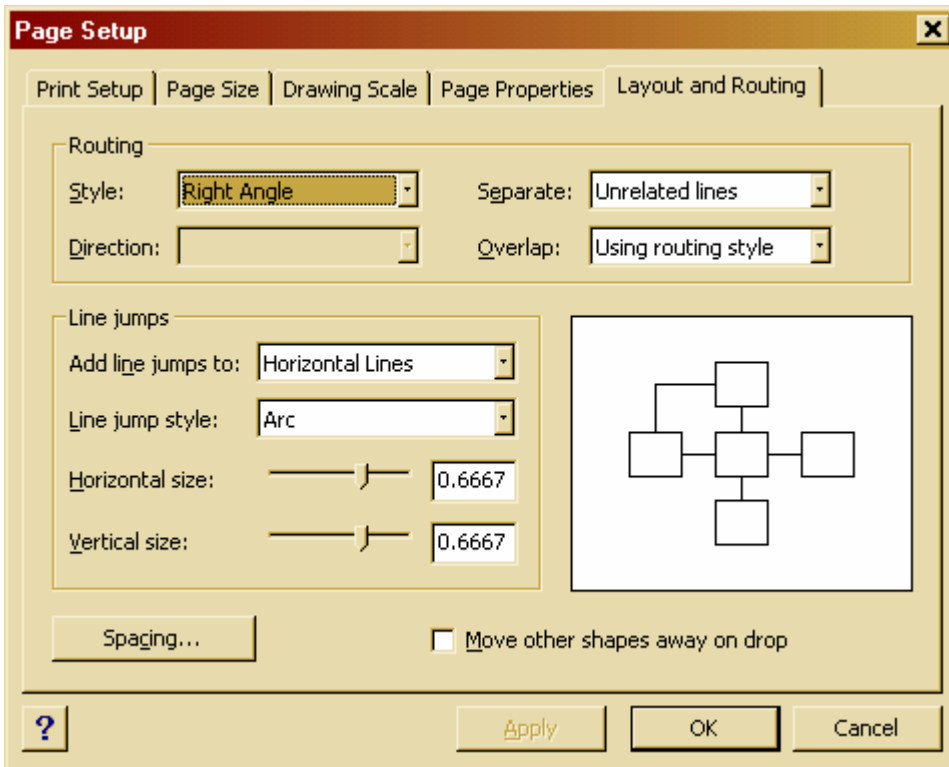
Line Jumps

In some drawings, such as flowcharts or network diagrams, connectors may cross over one another. In a complex drawing, it can be hard to follow the path of a connector if it crosses over another of the same type.

To make connections easier to follow when you or others analyze your drawing, you can have routable connectors display "line jumps," when they cross over other connectors.



Line jumps (A) clarify the shapes that a connector connects to.

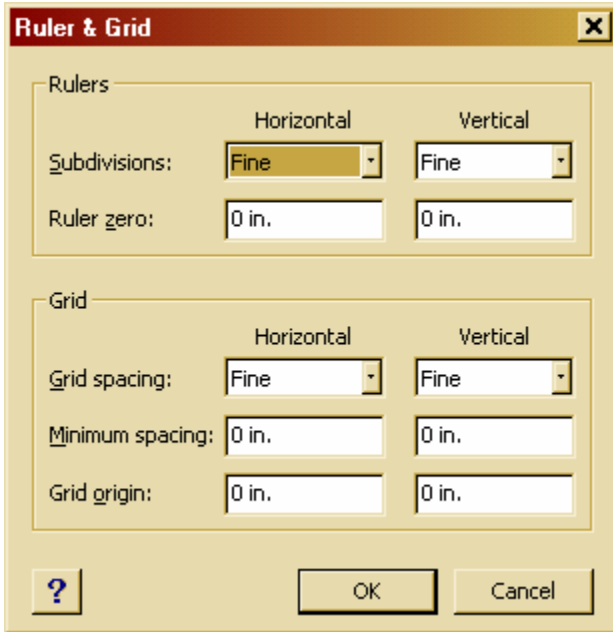


Extra

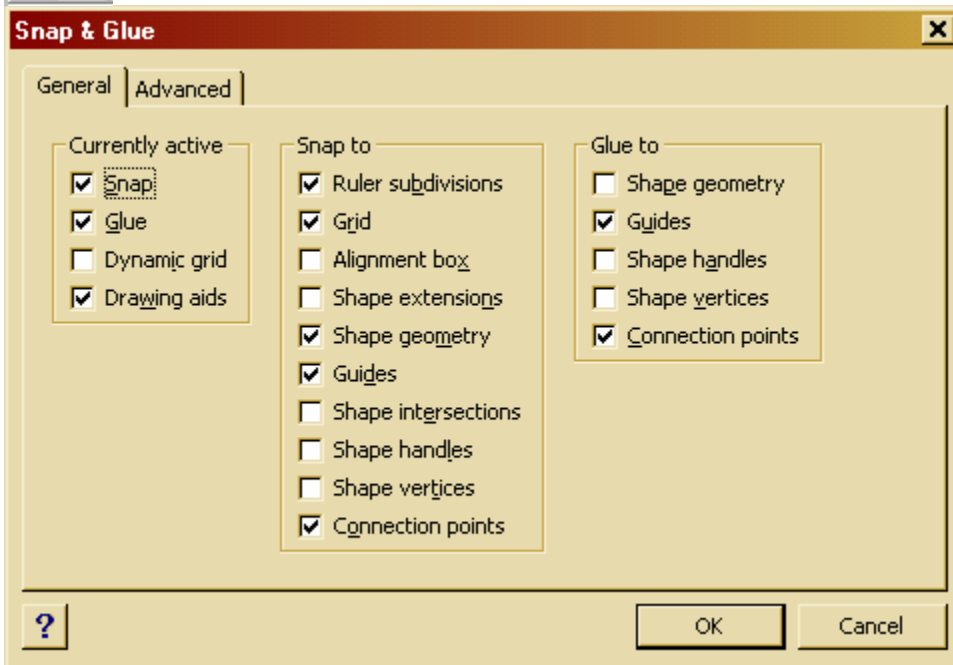
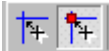
Tools – Ruler & Grid



Show Grid / Guides / Connectors

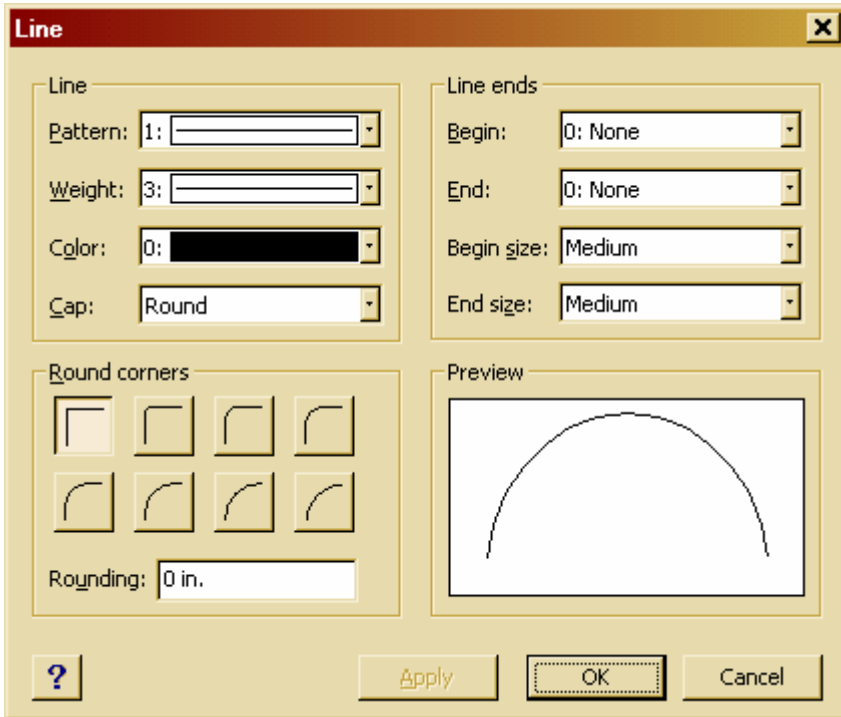
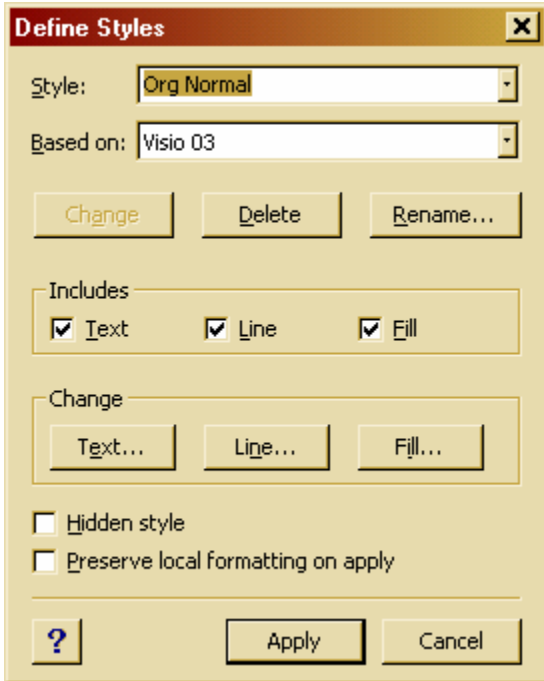


Tools - Snap & Glue



Format – Define Styles

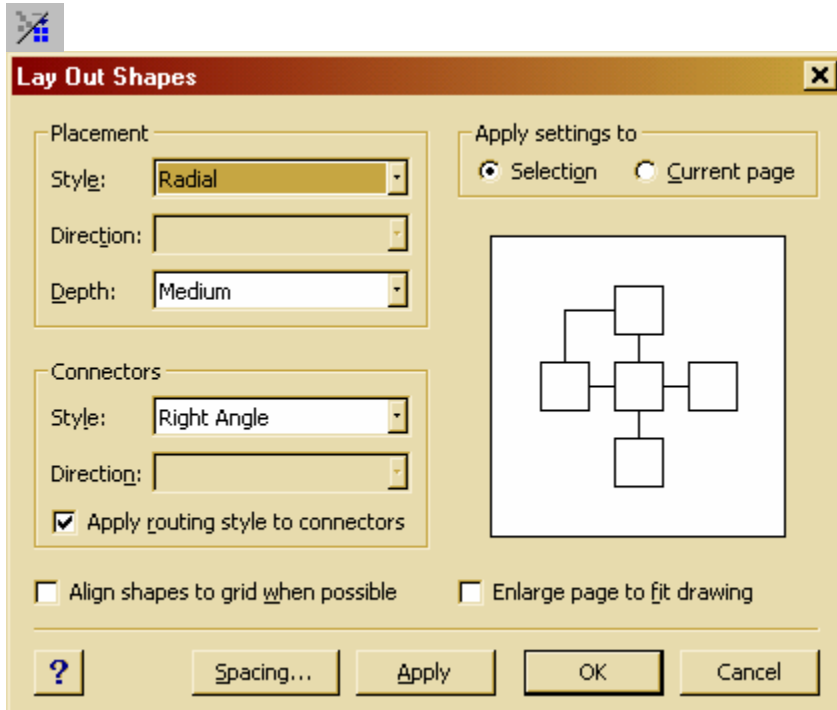
Rather than constantly changing line colour, thickness, end type, size arrow head, etc. you could default it with STYLES



Future use of Connector Icon will default to this style in this document.

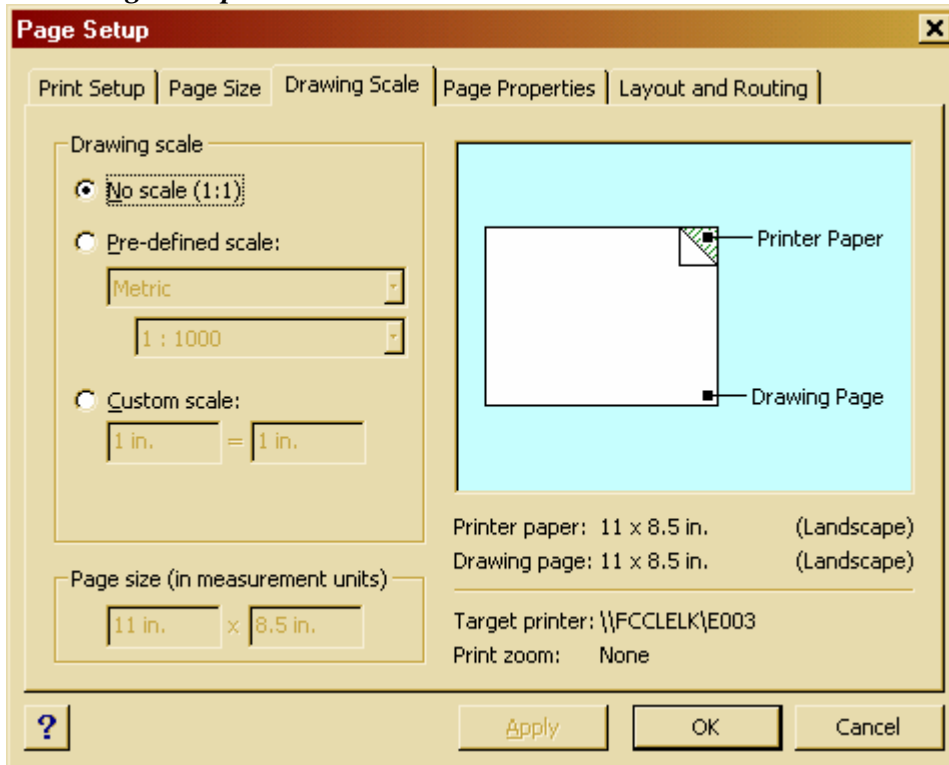
Could save this style on the Blank Template... or your main template you use each time.

Tools – Lay Out Shapes



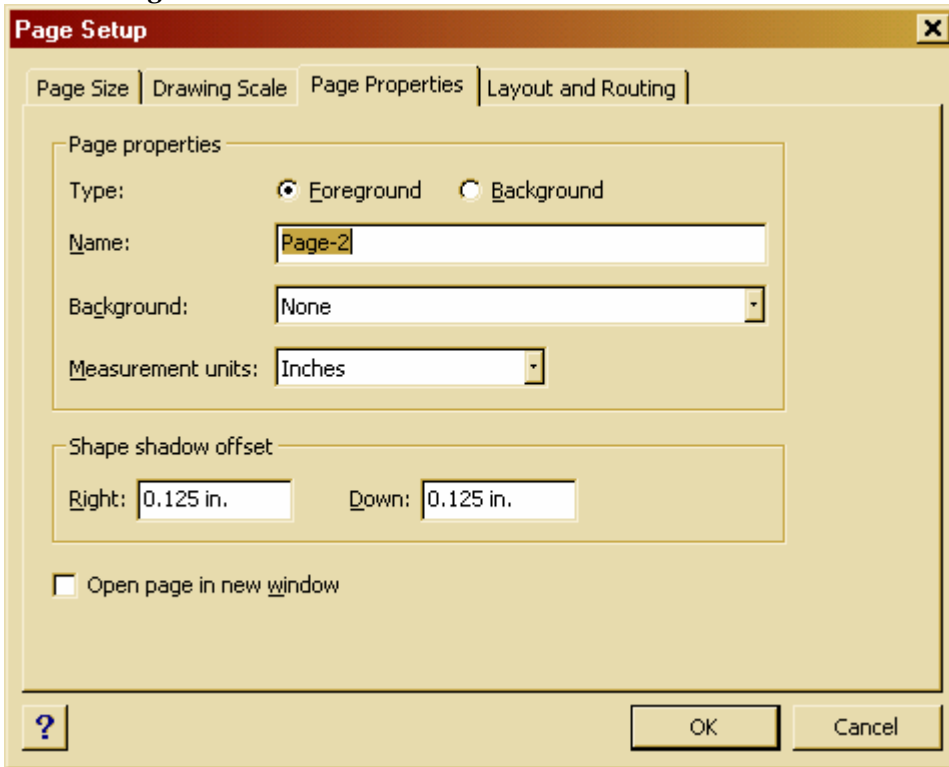
Drawing Scale

File – Page Setup

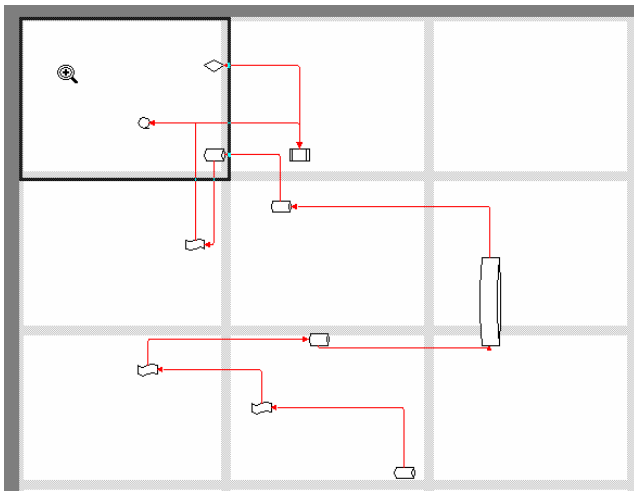


Pages

Insert – Page








If in File – Page Setup – change page size custom to be greater than printer can handle – will give multiple pages automatically, but will not be ‘separate pages’



Next / Previous Page – Page Dropdown



Visio Cheat Sheet

- Actual Size[Ctrl][I]
- Add Anchor point.....[Ctrl] click with  active
- Align Objects.....[F8]
- Constrain[Shift] draw or [Shift] drag
- Copy[Ctrl] drag or [Ctrl][d] or rt click – copy / paste
- Group.....[Ctrl][g] or 
- Help[F1]
- Repeat.....[F4]
- Rotate Left.....[Ctrl][L]
- Rotate Right.....[Ctrl][R]
- Select All[Ctrl] [a]
- Select Multiples.....[shift] clicking or selection box
- Send object Back.....[Ctrl][b] or 
- Send object Front[Ctrl][f] or 
- Undo an Undo (Redo)[Ctrl][Y]
- Undo[Ctrl][Z]
- Ungroup.....[Ctrl][U] or 
- Whole Page[Ctrl][W]
- Zoom in / out.....[Shift][Ctrl] with Left click / Right Click