

# 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.

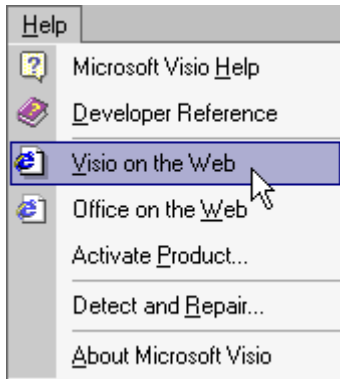
Saving a drawing as a template allows you to use a drawing as a model from which to base future drawings. **Templates** are saved with the **.vst** extension.

**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**:

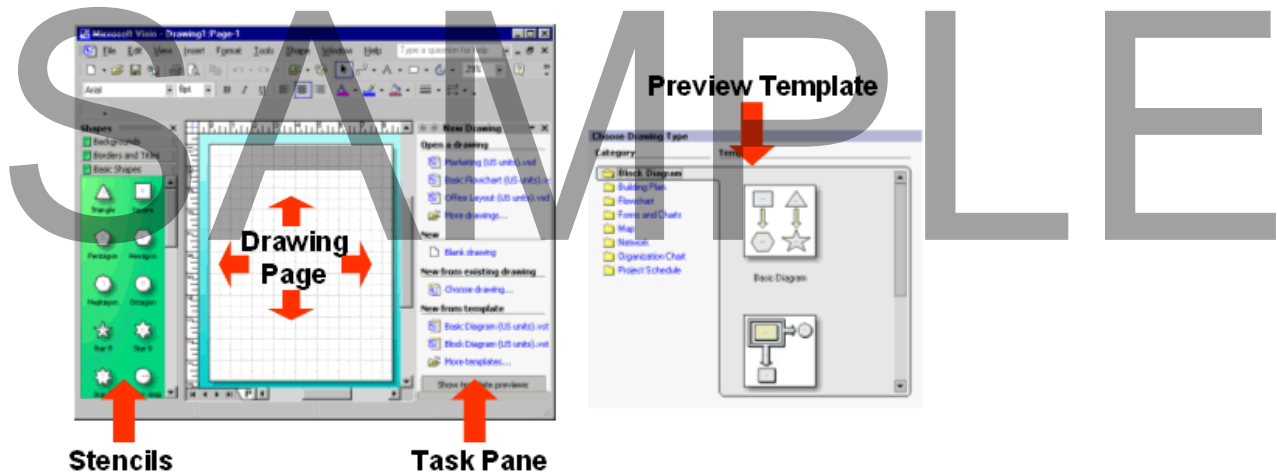


## Getting to Know the Visio Environment

### 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.

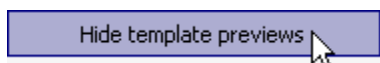
---

## 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.

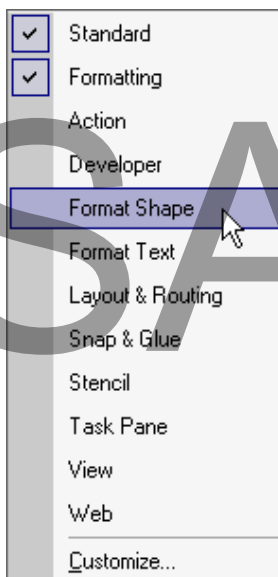
## Getting to Know Visio Toolbars

### 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.



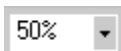
**Rectangle Tool** – Select the Rectangle Tool or Ellipse Tool using the drop-down menu.



**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.




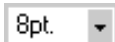
**Toolbar Options** – Customize the Standard toolbar using the drop-down menu.

## 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.


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

 **U 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.

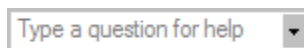
- ▼ **Toolbar Options** – Customize the Formatting toolbar using the drop-down menu.

## Getting Help

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### 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:



#### 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:



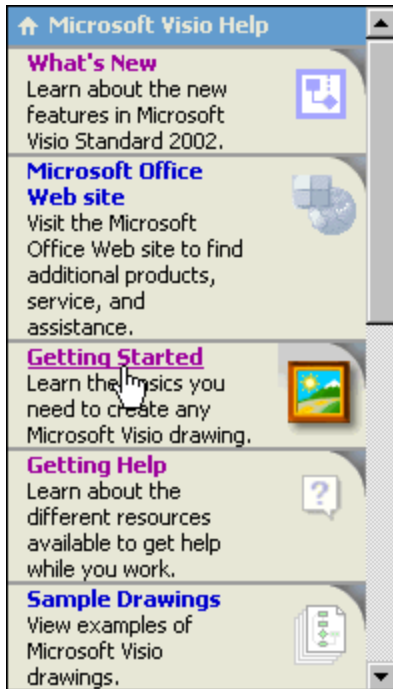
### Taking the Getting Started Tour

- 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?

## 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.

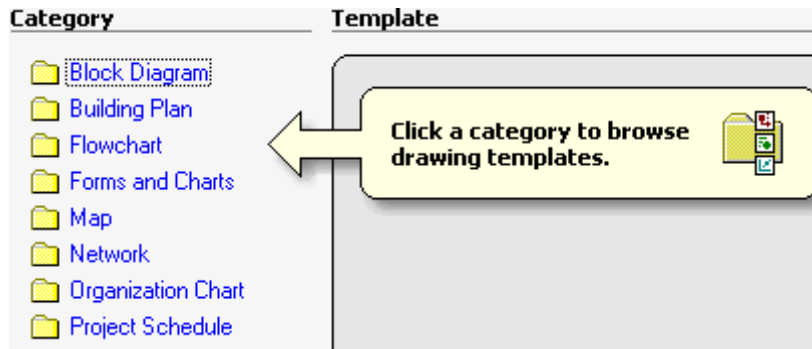
**To display drawing categories and templates:**

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

---

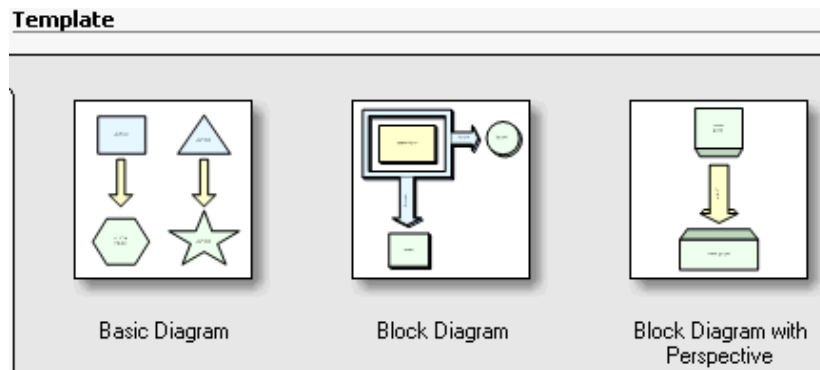
### Browsing Category Templates

- 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**.

SAMPLE

**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.

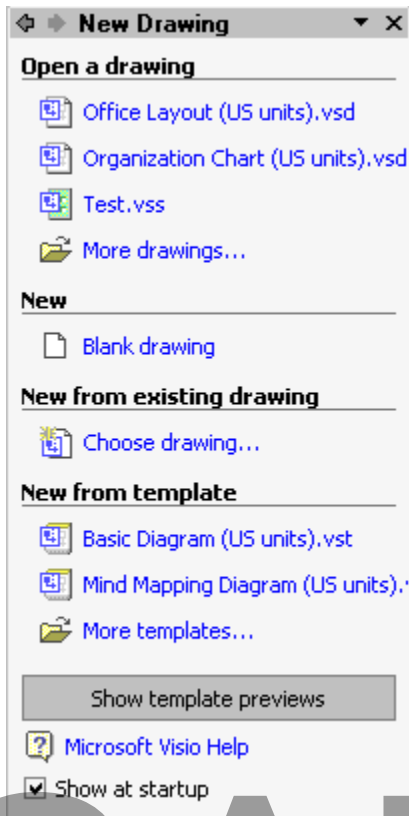
- By default, the **New Drawing** Task Pane opens with the **Template Preview** when you open Microsoft Visio.

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

---

## Displaying the New Drawing Task Pane

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

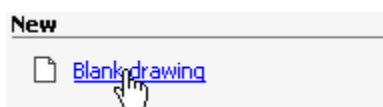


## Creating or Opening a Drawing

---

### 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:



- 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.

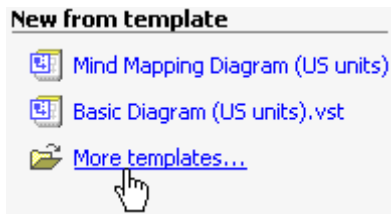
**To create a drawing from a template using the New Drawing Task Pane:**

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



- 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**:



**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.

---

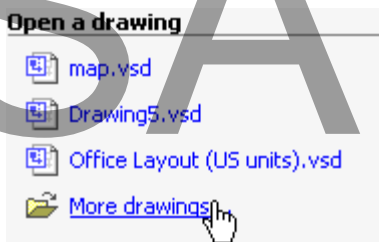
## Opening an Existing Drawing

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



- 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**.



**OR**

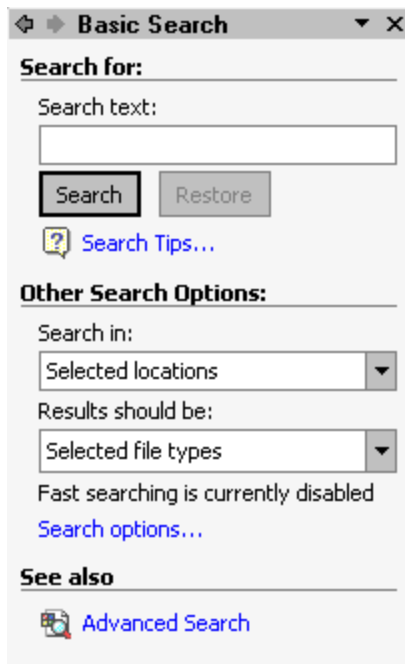
- Click the **Open** button on the **Standard** toolbar. This opens the **Open** dialog box.

- 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:



### 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**.

---

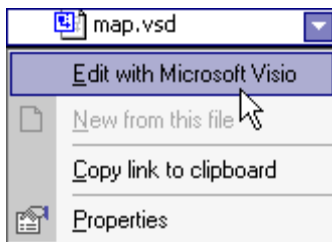
## Using Search Results

**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**

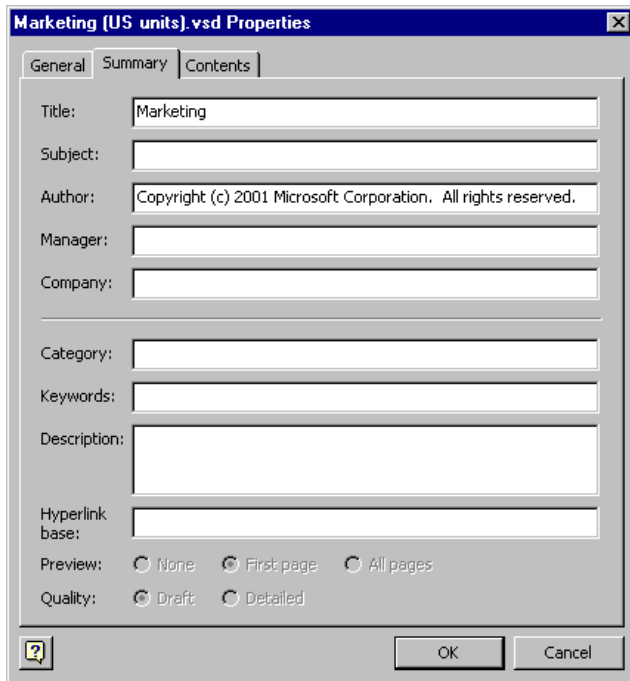
*OR* press the **Ctrl+S** key combination

*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:



**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.

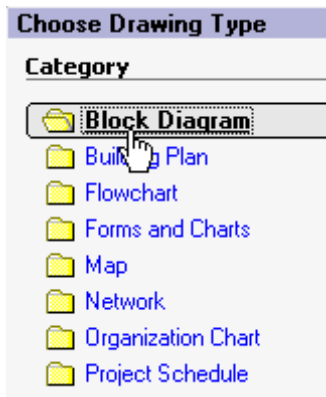
## Working with Block Diagram Templates

### 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

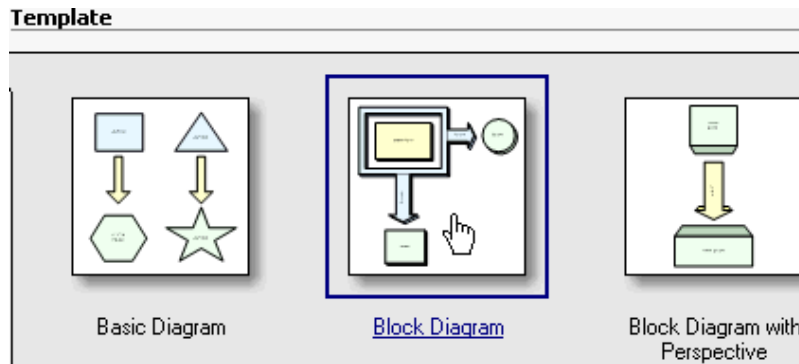
*OR* from the main menu, select **File > New > Block Diagram > Basic Diagram**.

### 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:

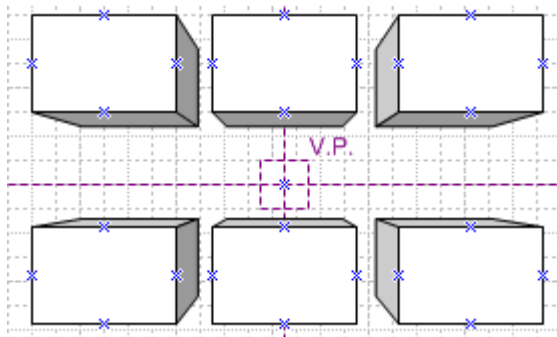
- With the **Preview Template** open, click **Block Diagram** in the **Category** list.
- Click **Block Diagram** in the Template list:



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**.

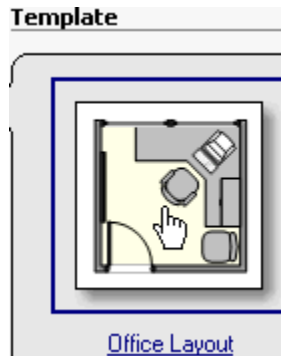
## Working with Building Plan Templates

## 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 Flow chart:

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

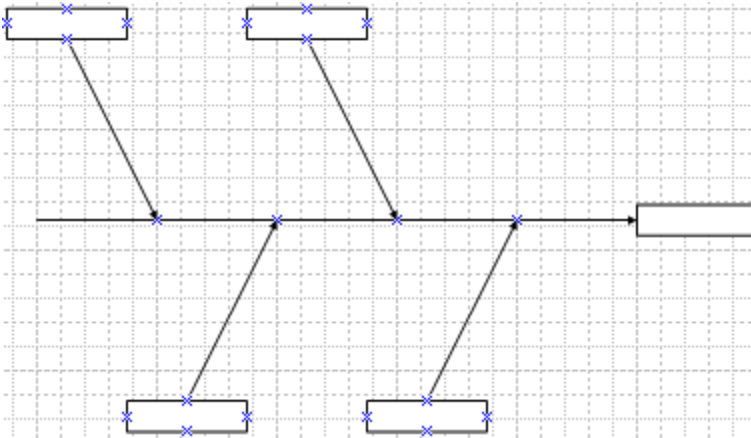
- Click **Basic Flowchart** in the Template list

*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:**

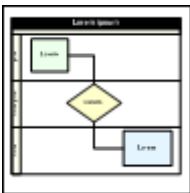
- With the **Preview Template** open, click **Flowchart** in the **Category** list.
- Click **Cause and Effect Diagram** in the Template list

*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:



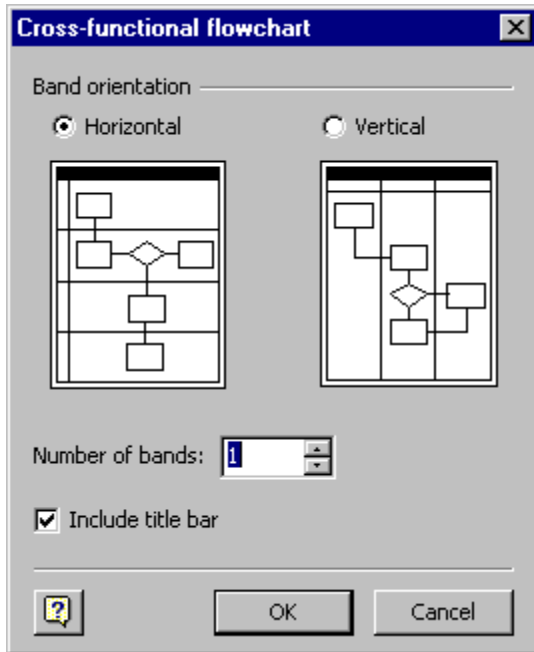
**To create a Cross-Functional Flowchart:**

- 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

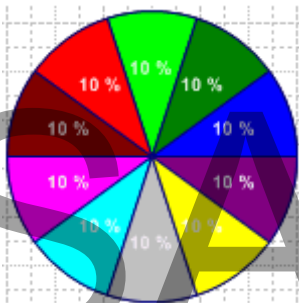
*OR* from the main menu, select **File > New > Flowchart > Work Flow Diagram**.

## **Working with Form and Chart Templates**

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### **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:

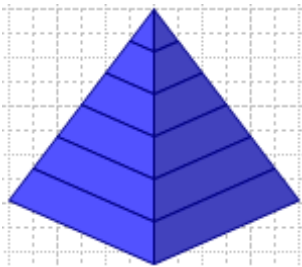
- With the Preview Template open, click **Forms and Charts** in the Category list.
- Click **Form Design** in the Template list

*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

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### 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:**

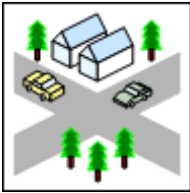
- With the **Preview Template** open, click **Map** in the **Category** list.
- Click **Directional Map** in the Template list

*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

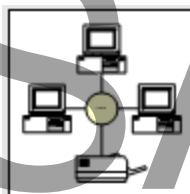
*OR* from the main menu, select **File > New > Map > Directional Map 3D**.

## Working with Network Templates

---

### Creating a Basic Network

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



Basic Network

**To create a Basic Network:**

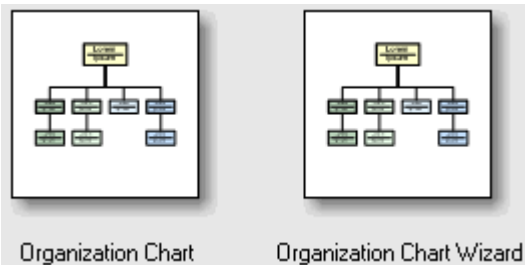
- With the **Preview Template** open, click **Network** in the **Category** list.
- Click **Basic Network** in the Template list

*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

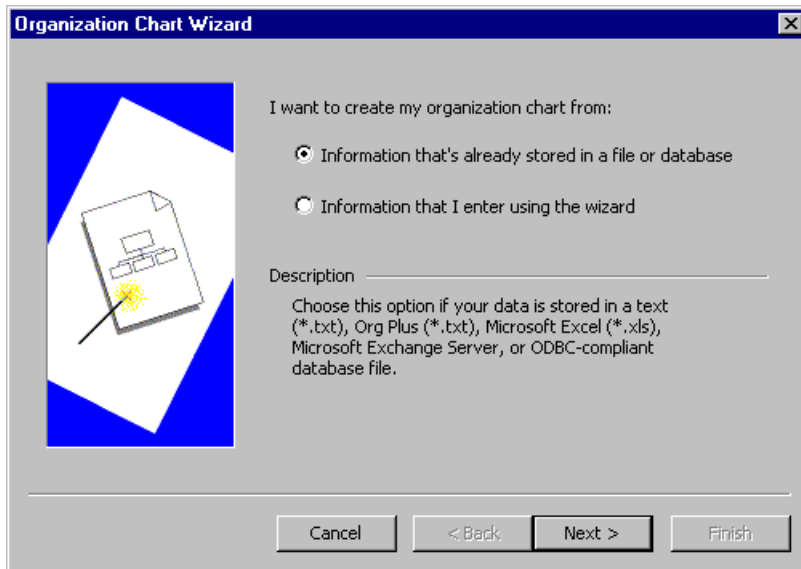
- The **Organization Chart Wizard** generates an organization chart by using existing personnel data or by using data entered into the wizard.

#### 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	Gantt Chart					
					■	■	■	■	■	■
1	Task 1	3/21/2002	3/21/2002	1d	■	■	■	■	■	■
2	Task 2	3/21/2002	3/21/2002	1d	■	■	■	■	■	■
3	Task 3	3/21/2002	3/21/2002	1d	■	■	■	■	■	■
4	Task 4	3/21/2002	3/21/2002	1d	■	■	■	■	■	■
5	Task 5	3/21/2002	3/21/2002	1d	■	■	■	■	■	■

**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?

SAMPLE

## 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.

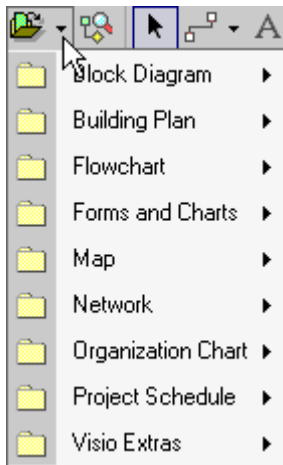
**To display the Stencil toolbar:**

- 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.

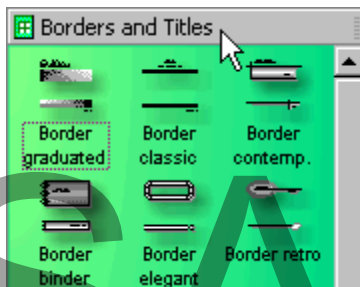
**OR**

- 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:**

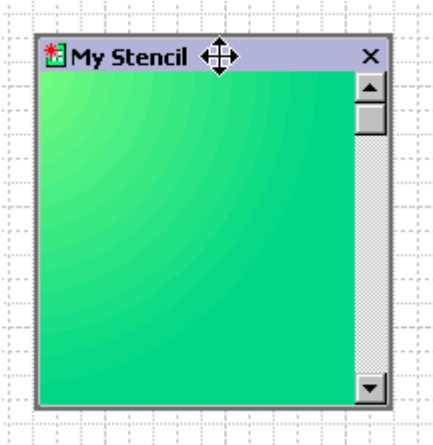
- From the main menu, select **File > Stencils > New Stencil**

**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:



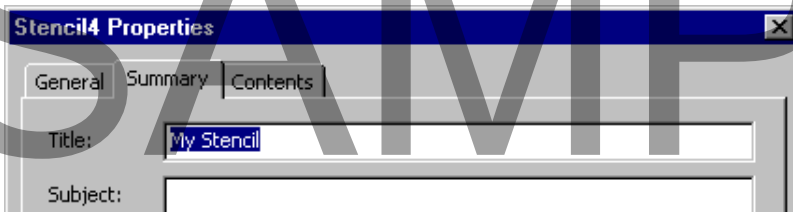
- Click and drag the shapes you want from the existing stencil into the new stencil.

**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:



---

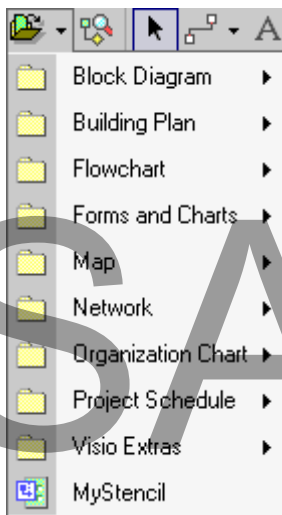
## Saving a Stencil

- 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:



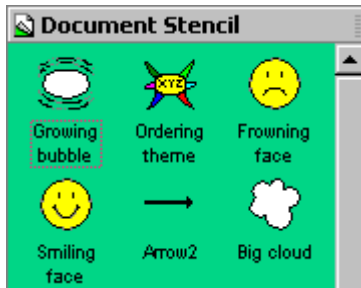
---

## 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.

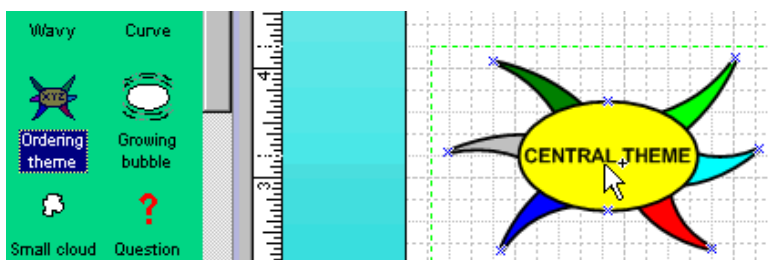
## Working with Shapes

### 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

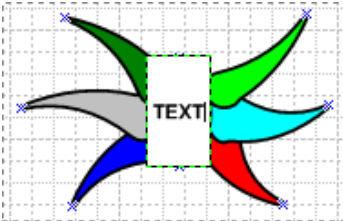
- Click and drag a shape from a stencil to the drawing page:



---

### 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:



---

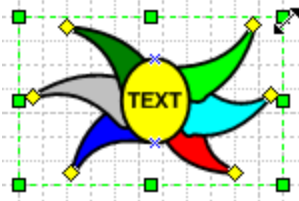
### Moving a Shape

- 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

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### 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**.

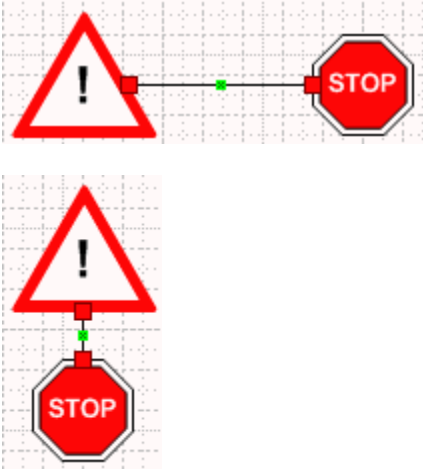
- Drag the connector's end point to the shape you want to connect to until a red box surrounds the shape.

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

---

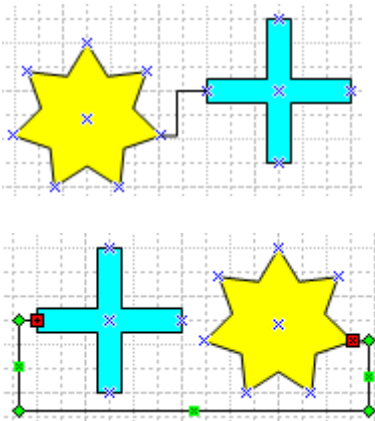
## Creating Dynamic Glue

- 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:



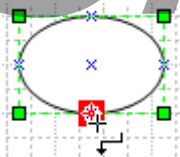
### Creating Static Glue

- 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:

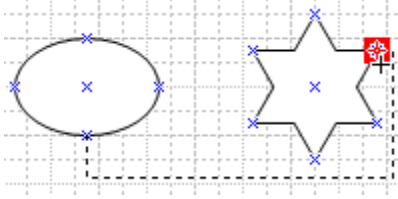


### To create static glue:

- 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:

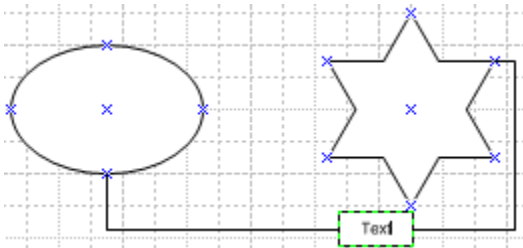


- Release the mouse button.

---

### 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**.

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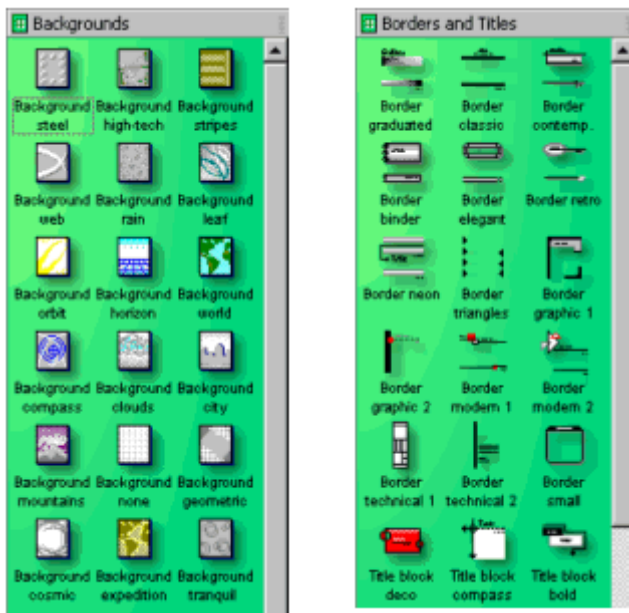
### Adding Backgrounds, Borders, and Titles

---

#### 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:

SAMPLE



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

SAMPLE

- 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**.

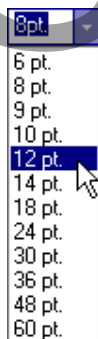
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## Changing the Font Size

- 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**

- 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**.

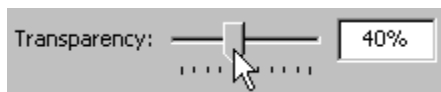
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### Changing the Font Transparency

- 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**.

---

### Changing the Font Style

- 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 style.
- Click the **Bold**, **Italic**, or **Underline** buttons on the **Formatting** toolbar.

**OR**

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Check the font style boxes you want in the **Style** area:



- Click **OK**.

---

## Changing Character Spacing

- Scaling increases or decreases character width.
- Spacing increases or decreases the amount of space between characters.

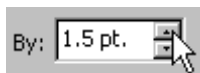
### To change character spacing:

- 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 character spacing.
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Select a scaling option from the **Scale** drop-down menu.
- Select a character spacing option from the **Spacing** drop-down menu.

**Note:** To change character spacing width, click the up and down arrows next to the **By** box:



- Click **OK**.

---

## Aligning Text

- 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 you want to align.

### To horizontally align text:

- Click the **Align Left**, **Align Center**, or **Align Right** button on the Formatting toolbar.

*OR*

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.

- Click the **Paragraph** tab.
- Select the horizontal text alignment you want from the **Horizontal alignment** drop-down menu.
- Click **OK**.

**To vertically align text:**

- Click the **Align Top**, **Align Middle**, or **Align Bottom** button on the Format Text toolbar.

*OR*

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Click the **Text Block** tab.
- Select the vertical text alignment you want from the **Vertical** drop-down menu.
- Click **OK**.

---

### Changing Line Indentation

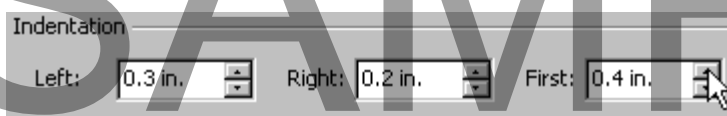
- Double-click the text box containing the text you want to format

*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 line indentation.
- Click the **Decrease Indent** or **Increase Indent** button on the Format Text toolbar.

*OR*

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Click the **Paragraph** tab.
- Click the up and down arrows next to the **Left**, **Right**, and **First** boxes in the **Indentation** area:



- Click **OK**.

---

### Changing Paragraph Spacing

- 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 paragraphs for which you want to change the paragraph spacing.
- Click the **Decrease Paragraph Spacing** or **Increase Paragraph Spacing** button on the Format Text toolbar.

*OR*

- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Click the **Paragraph** tab.
- Click the up and down arrows next to the **Before**, **After**, and **Line** boxes in the **Spacing** area.
- Click **OK**.

---

### Changing Text Margins

- 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 margins.
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Click the **Text Block** tab.
- Click the up and down arrows next to the **Top**, **Left**, **Bottom**, and **Right** boxes in the **Margins** area.
- Click **OK**.

---

### Adding a Text Background

- 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 add a background.
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
- Click the **Text Block** tab.
- Select the **Solid color** option button in the **Text background** area.
- Select a color from the **Solid color** drop-down menu.
- Click and drag the **Transparency** slide indicator to the desired transparency.
- Click **OK**.

---

## Adding Tabs

- 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 add tabs.
  - From the main menu, select **Format > Text**. This opens the **Text** dialog box.
  - Click the **Tabs** tab.
  - Enter a tab stop in the **Tab stop position** box using the up and down arrows.
  - Select the appropriate **Alignment** option box.
  - Click **Add**.
  - Click **OK**.

---

## Adding Bullets

- 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 add bullets.
  - Click the **Bullets** button on the **Format Text** toolbar.
- OR*
- From the main menu, select **Format > Text**. This opens the **Text** dialog box.
  - Click the **Bullets** tab.
  - Click the bullet style you want.
- Note:** To create a custom bullet, type a character in the **Custom** box.
- Click **OK**.

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## Formatting Shapes

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### Using the Format Shape Toolbar

- The **Format Shape** toolbar provides quick access to some commonly used shape formatting tasks.

**To display the Format Shape toolbar:**

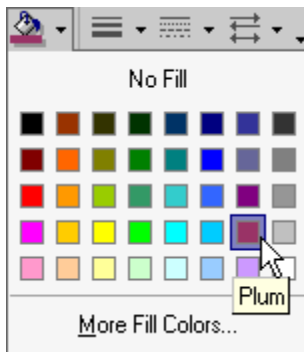
- From the main menu, select **View > Toolbars > Format Shape**:



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**Changing the Fill Color**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you for which you want to add or change a fill color.
- Click the **Fill Color** down arrow on the **Formatting** toolbar.
- From the drop-down menu, select the fill color you want:



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

**OR**

- From the main menu, select **Format > Fill**. This opens the **Fill** dialog box.
- Select the color you want from the **Color** drop-down menu in the **Fill** area.
- Click **OK**.

---

**Changing the Fill Pattern**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape for which you want to add or change a fill pattern.
- Click the **Fill Pattern** down arrow on the **Format Shape** toolbar:



- From the drop-down menu, select the fill pattern you want.

**Note:** For more patterns, click **More Fill Patterns**.

**OR**

- From the main menu, select **Format > Fill**. This opens the **Fill** dialog box.
- Select the pattern you want from the **Pattern** drop-down menu in the **Fill** area.
- Click **OK**.

---

### Changing the Fill Transparency

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape for which you want to change the fill transparency.
- From the main menu, select **Format > Fill**. This opens the **Fill** dialog box.
- Click and drag the **Transparency** slide indicator in the **Fill** area to the transparency you want.
- Click **OK**.

---

### Adding a Shadow

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape for which you want to add a shadow.
- Click the **Shadow Color** down arrow on the **Format Shape** toolbar.
- From the drop-down menu, select the shadow color you want.

**Note:** For more shadows, click **More Shadow Colors**.

**OR**

- From the main menu, select **Format > Shadow**. This opens the **Shadow** dialog box.
- Select a shadow color from the **Color** drop-down menu.
- Select a shadow pattern from the **Pattern** drop-down menu.
- Select a pattern color from the **Pattern color** drop-down menu.
- Click and drag the **Transparency** slide indicator to the transparency you want.
- Click **OK**.

---

### Changing the Line Color

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the line for which you want to add or change the line color.
- Click the **Line Color** down arrow on the **Formatting** toolbar.
- From the drop-down menu, select the line color you want.

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

**OR**

- From the main menu, select **Format > Line**. This opens the **Line** dialog box.

- Select a line color from the **Color** drop-down menu in the **Line** area.
- Click **OK**.

---

### Changing the Line Weight

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the line for which you want to change the line weight.
- Click the **Line Weight** down arrow on the **Formatting** toolbar.
- From the drop-down menu, select the line weight you want.

**Note:** For more weights, click **More Line Weights**.

*OR*

- From the main menu, select **Format > Line**. This opens the **Line** dialog box.
- Select a line weight from the **Weight** drop-down menu in the **Line** area.
- Click **OK**.

---

### Changing the Line Pattern

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the line for which you want to add or change the line pattern.
- Click the **Line Pattern** down arrow on the **Formatting** toolbar.
- From the drop-down menu, select the line pattern you want.

**Note:** For more patterns, click **More Line Patterns**.

*OR*

- From the main menu, select **Format > Line**. This opens the **Line** dialog box.
- Select a line pattern from the **Pattern** drop-down menu in the **Line** area.
- Click **OK**.

---

### Changing the Line Ends

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the line for which you want to add or change line ends.
- Click the **Line Ends** down arrow on the **Formatting** toolbar.
- From the drop-down menu, select the line end you want.

**Note:** For more line ends, click **More Line Ends**.

*OR*

- From the main menu, select **Format > Line**. This opens the **Line** dialog box.
- Select the line end options you want from the drop-down menus in the **Line ends** area.
- Click **OK**.

---

## Rounding Corners

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the line for which you want to round corners.
- Click the **Corner Rounding** down arrow on the **Format Shape** toolbar.
- From the drop-down menu, select the corner rounding you want.

**Note:** For more corner roundings, click **More Corner Roundings**.

*OR*

- From the main menu, select **Format > Corner Rounding**. This opens the **Corner Rounding** dialog box.
- Click the corner rounding you want.
- Click **OK**.

---

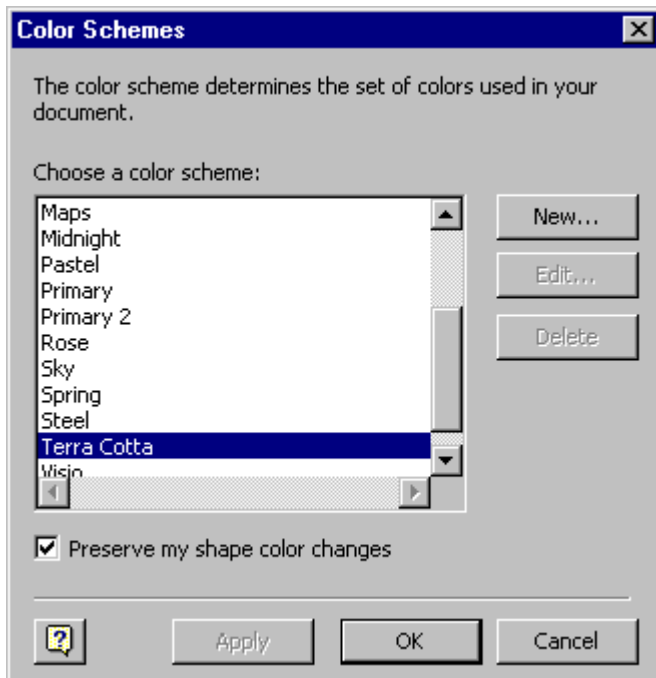
## Applying a Color Scheme

- Instead of applying fill and line colors to individual shapes, sometimes it's easier to apply a color scheme.

**To apply a color scheme:**

- Right-click on the drawing page.
- From the pop-up menu, select **Color Schemes**. This opens the **Color Schemes** dialog box:

SAMPLE



- Select the color scheme you want.
- Click **OK**.

**Note:** To preview the color scheme without exiting the **Color Schemes** dialog box, click **Apply**.

## Managing Shapes

### Using the Action Toolbar

- The **Action** toolbar provides quick access to some commonly used shape management tasks.

#### To display the Action toolbar:

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



### Grouping and Ungrouping Shapes

- Grouped shapes are a selection of individual shapes that have been grouped to create one object.

- Grouping shapes is useful when you need to make the same changes to a group of shapes, such as **resizing** or **moving**.

**To group shapes:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Press and hold the **Shift** key on your keyboard.
- Click on each shape you want to group.
- From the main menu, select **Shape > Grouping > Group**

*OR* press the **Shift+Ctrl+G** key combination

*OR* click the **Group** button on the **Action** toolbar.

**To ungroup shapes:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the group you want to ungroup.
- From the main menu, select **Shape > Grouping > Ungroup**

*OR* press the **Shift+Ctrl+U** key combination

*OR* click the **Ungroup** button on the **Action** toolbar.

---

**Ordering Shapes**

- Ordering shapes is useful when you have multiple shapes on a page and you want to ensure a particular shape is in the foreground or background.

**To bring a shape to the front:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to bring to the front.
- From the main menu, select **Shape > Order > Bring to Front**

*OR* click the **Bring to Front** button on the **Action** toolbar.

**To send a shape to the back:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to send to the back.
- From the main menu, select **Shape > Order > Send to Back**

*OR* click the **Send to Back** button on the **Action** toolbar.

**To bring a shape forward:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to bring forward.
- From the main menu, select **Shape > Order > Bring Forward**.

**To send a shape backward:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to send backward.
- From the main menu, select **Shape > Order > Send Backward**.

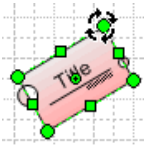
---

**Rotating Shapes**

- Free rotate allows you to rotate a shape to any angle.
- Rotating a shape left or right rotates the shape 90 degrees.

**To free rotate a shape:**

- Click the **Rotation Tool** button on the **Standard** toolbar.
- Select the shape you want to **free rotate**.
- Click and drag a **Rotate** handle until you reach the angle you want:



**To rotate a shape to the left:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to rotate to the left.
- From the main menu, select **Shape > Rotate or Flip > Rotate Left**

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

*OR* click the **Rotate Left** button on the **Action** toolbar.

**To rotate a shape the right:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to rotate to the right.
- From the main menu, select **Shape > Rotate or Flip > Rotate Right**

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

*OR* click the **Rotate Right** button on the **Action** toolbar.

**To rotate text within a shape:**

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape containing the text you want to rotate.
- From the main menu, select **Shape > Rotate or Flip > Rotate Text**

*OR* click the **Rotate Text** button on the **Action** toolbar.

## Flipping Shapes

### To flip shapes vertically:

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to flip vertically.
- From the main menu, select **Shape > Rotate or Flip > Flip Vertical**

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

*OR* click the **Flip Vertical** button on the **Action** toolbar.

### To flip shapes horizontally:

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape you want to flip horizontally.
- From the main menu, select **Shape > Rotate or Flip > Flip Horizontal**

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

*OR* click the **Flip Horizontal** button on the **Action** toolbar.

## Aligning Shapes

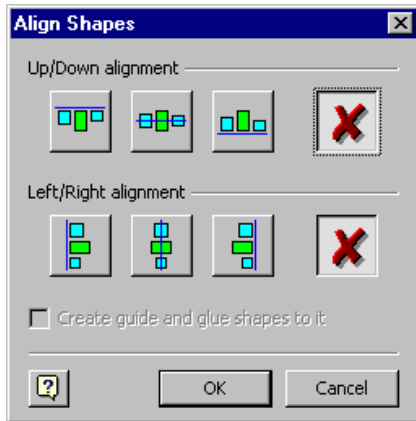
- Shapes can be aligned vertically by aligning the top of the shapes, the horizontal center of the shapes, or the bottom of the shapes.
- Shapes can be aligned horizontally by aligning the left of the shapes, the vertical center of the shapes, or the right of the shapes.

### To align shapes:

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Hold down the **Shift** key on your keyboard.
- Select the shapes you want to align.
- From the main menu, select **Shape > Align Shapes**

*OR* click the **Align Shapes** button on the **Action** toolbar.

- This opens the **Align Shapes** dialog box:



- Click the shape alignment you want.
- Click **OK**.

---

## Distributing Shapes

- Distributing shapes distributes three or more shapes at selected intervals from each other.
- Shapes can be distributed horizontally so the horizontal space between shapes is uniform, the space between the left edges is uniform, the space between the right edges is uniform, or the space between the centers is uniform.
- Shapes can be distributed vertically so the vertical space between shapes is uniform, the space between the top edges is uniform, the space between the bottom edges is uniform, or the space between the centers is uniform.

### To distribute shapes:

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Hold down the **Shift** key on your keyboard.
- Select the shapes you want to distribute.
- From the main menu, select **Shape > Distribute Shapes**  
**OR** click the **Distribute Shapes** button on the **Action** toolbar.
- This opens the **Distribute Shapes** dialog box.
- Click the shape distribution you want.
- Click **OK**.

---

## Laying Out Shapes

- Laying out shapes positions shapes on the drawing page automatically. When setting a shape layout, shape placement, connector routing, and shape space can be controlled.

**Note:** Laying out shapes is useful for network diagrams, flowcharts, and organization charts.

**To lay out shapes:**

- From the main menu, select **Shape > Lay Out Shapes**

**OR** click the **Lay Out Shapes** button on the **Action** toolbar.

- This opens the **Lay Out Shapes** dialog box.
- Select the shape placement you want from the drop-down menus in the **Placement** area.
- Select the connector routing options you want from the drop-down menus in the **Connectors** area.
- Click the **Spacing** button. This opens the **Layout and Routing Spacing** dialog box.
- Set the shape spacing you want.
- Click **OK**.
- Click **OK** again to apply the settings.

**Note:** To layout a section of shapes instead of the whole drawing page, select the shapes you want to layout before opening the **Lay Out Shapes** dialog box.

---

## Centering a Drawing

- From the main menu, select **Shape > Center Drawing**.

## Formatting Connectors

### Using the Layout & Routing Toolbar

- The **Layout & Routing** toolbar provides quick access to some commonly used layout and routing tasks.

#### To display the Layout & Routing toolbar:

- From the main menu, select **View > Toolbars > Layout & Routing**:



---

## Changing Connector Routing Options

- Dynamic Connectors offer routing options which affect how the connector routes around shapes. Routing options include: **Reroute Connector, Reroute**

**Freely, Reroute as Needed, Reroute on Crossover, and Never Reroute.**

**Rerouting** a connector reroutes the connector regardless of its previous setting.

**Rerouting freely**, the default setting for a Dynamic Connector, reroutes a connector whenever needed.

**Rerouting as needed** only reroutes the connector when the connector will pass through another shape or the connector will cross through the shape to which it is connected.

**Rerouting on crossover** reroutes a connector when it will cross through the shape to which it's connected.

**Never rerouting** never reroutes the connector, even if the connector crosses through the shape to which it is connected.

**To change connector routing options:**

- Right-click on the connector you want to reroute.
- From the pop-up menu, select the routing option you want.

**OR**

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the connector you want to reroute.
- Click the routing button you want on the **Layout & Routing** toolbar.

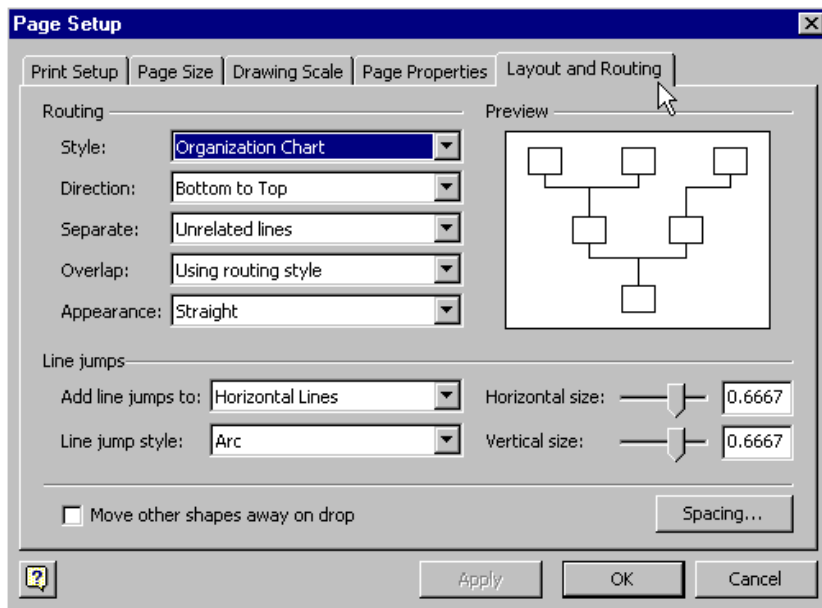
---

**Changing Routing Style and Direction**

- From the main menu, select **File > Page Setup**. This opens the **Page Setup** dialog box.

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- Click the **Layout and Routing** tab:



- Select a routing style from the **Style** drop-down menu.

**Note:** If the **Flowchart**, **Tree**, **Organization Chart**, or **Simple** connector style is selected, the **Direction** drop-down menu will become available.

- Select a layout direction from the **Direction** drop-down menu.
- Click **OK**.

**OR**

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the connector(s) for which you want to set routing style and direction.
- Select a routing style and direction from the **Routing Style** drop-down menu on the **Layout & Routing** toolbar.

### Separating Overlapping Connectors

- Options offered to separate overlapping connector lines include separating unrelated lines, separating all lines, separating no lines, or using the routing style specific to the connector.

**To set overlapping connector separation options:**

- From the main menu, select **File > Page Setup**.
- Click the **Layout and Routing** tab.
- Select a separation option from the **Separate** drop-down menu.
- Click **OK**.

---

## Overlapping Separated Connectors

- Options offered to overlap separated connector lines include overlapping related lines, overlapping all lines, overlapping no lines, or using the routing style specific to the connector.

### To set separated connector overlapping options:

- From the main menu, select **File > Page Setup**.
- Click the **Layout and Routing** tab.
- Select an overlapping option from the **Overlap** drop-down menu.
- Click **OK**.

---

## Setting Line Jump Options

- When two connector lines cross on a drawing, a line jump will appear:



- Only Dynamic Connectors display line jumps.

### To set line jump options:

- From the main menu, select **File > Page Setup**.
- Click the **Layout and Routing** tab.
- Select the line type to add jumps to from the **Add line jumps to** drop-down menu.
- Select the line jump style you want from the **Line jump style** drop-down menu.

**Note:** To set the line jump size, click and drag the **Horizontal size** and **Vertical size** slide indicators to the sizes you want.

- Click **OK**.

**OR**

- Click the down arrow on the **Add line jumps to** button on the **Layout & Routing** toolbar:



- Select the line type to add jumps to from the drop-down menu.
- Click the down arrow on the **Line jump style** button on the **Layout & Routing** toolbar:



- Select the line jump style you want from the drop-down menu.

---

### Setting Space Options

- Space options include specifying space between shapes, specifying space between connectors and shapes, and specifying the average shape size.

#### To set space options:

- From the main menu, select **File > Page Setup**.
- Click the **Layout and Routing** tab.
- Click the **Spacing** button. This opens the **Layout and Routing Spacing** dialog box.
- Set the spacing options you want.
- Click **OK**.
- Click **OK** again.

---

### Using Curved and Straight Connectors

- Dynamic Connectors can either be straight or curved.

#### To use curved connectors:

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the connector(s) you want curved.
- Click the **Curved Lines** button on the **Layout & Routing** toolbar.

#### To use straight connectors:

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the connector(s) you want straightened.
- Click the **Straight Lines** button on the **Layout & Routing** toolbar.

---

### Using Snap and Glue

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#### Using the Snap & Glue Toolbar

- The **Snap & Glue** toolbar provides quick access to snap and glue settings.

#### To display the Snap & Glue toolbar:

- From the main menu, select **View > Toolbars > Snap & Glue**:



---

## About Snapping

- Snapping settings determine how shapes are pulled into place when placed on the drawing page in relation to other shapes, the grid, guides, rulers, and other elements.

---

## About Gluing

- Gluing settings determine which elements of a shape are used to glue connectors.

---

## Viewing Active Snap and Glue Elements

- From the main menu, select **Tools > Snap & Glue**. This opens the **Snap & Glue** dialog box.

### To turn snap elements on or off:

- Check or uncheck the **Snap** box in the **Currently active** area in the **Snap & Glue** dialog box

*OR* click the **Toggle Snap** button on the **Snap & Glue** toolbar.

### To turn glue elements on or off:

- Check or uncheck the **Glue** box in the **Currently active** area in the **Snap & Glue** dialog box

*OR* click the **Toggle Glue** button on the **Snap & Glue** toolbar.

---

## Snapping to an Item

- From the main menu, select **Tools > Snap & Glue**. This opens the **Snap & Glue** dialog box.
- Check the items you want to snap to in the **Snap to** area.
- Click **OK**

*OR* click the **Snap to** buttons you want on the **Snap & Glue** toolbar.

## Gluing to an Item

- From the main menu, select **Tools > Snap & Glue**. This opens the **Snap & Glue** dialog box.
- Check the shape elements you want to glue to in the **Glue to** area.
- Click **OK**

*OR* click the **Glue to** buttons you want on the **Snap & Glue** toolbar.

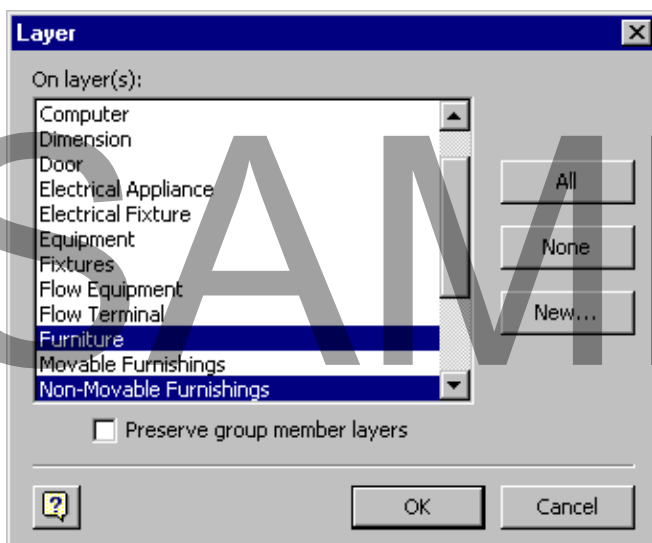
## Using Layers

### About Layers

- Layers organize related shapes on a drawing page. Layers are useful for viewing, printing, and locking a series of related shapes. Visio 2002 automatically assigns layers to many shapes. When a shape is added to the drawing page, it is usually added to an existing layer (if the drawing page contains related shapes) or it is assigned to a new layer.

### Assigning a Shape to a Layer

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the shape for which you want to assign a layer.
- From the main menu, select **Format > Layer**. This opens the **Layer** dialog box:



- The layer(s) to which the shape is currently assigned are highlighted in the **On Layer(s)** list.

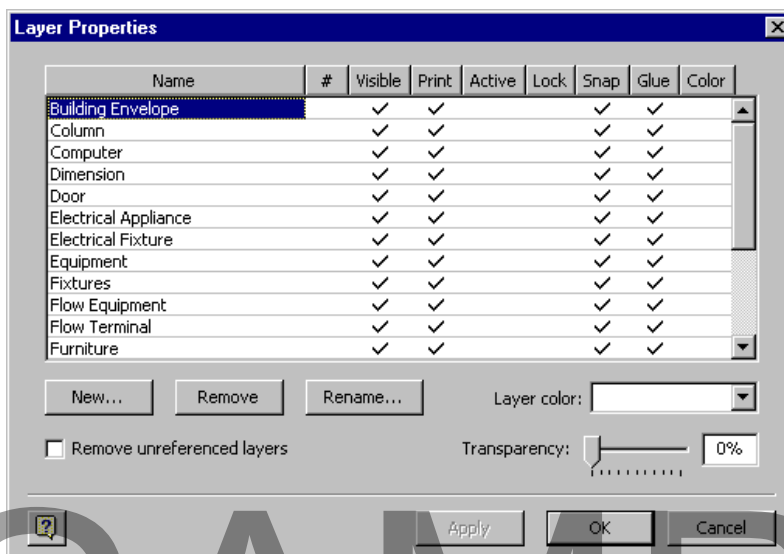
- Select the layer(s) you want to assign the shape to from the **On Layer(s)** list.
- Click **OK**.

### Creating a New Layer

- From the main menu, select **Format > Layer**. This opens the **Layer** dialog box.
- Click the **New** button. This opens the **New Layer** dialog box.
- Enter a layer name.
- Click **OK**.
- Click **OK** again.

### Showing and Hiding Layers

- From the main menu, select **View > Layer Properties**. This opens the **Layer Properties** dialog box:



- Check or uncheck the layer(s) you want to show or hide under the **Visible** category.

### Selecting a Layer to Print

- From the main menu, select **View > Layer Properties**. This opens the **Layer Properties** dialog box.
- Check or uncheck the layer(s) you want to print under the **Print** category.

### Locking a Layer

- From the main menu, select **View > Layer Properties**. This opens the **Layer Properties** dialog box.
- Check or uncheck the layer(s) you want to lock under the **Lock** category.

### Renaming a Layer

- From the main menu, select **View > Layer Properties**. This opens the **Layer Properties** dialog box.
- Select the layer you want to rename.
- Click the **Rename** button. This opens the **Rename Layer** dialog box.
- Enter a layer name.
- Click **OK**.
- Click **OK** again.

### Assigning a Color to a Layer

- From the main menu, select **View > Layer Properties**. This opens the **Layer Properties** dialog box.
- Select the layer for which you want to assign a color.
- Select a layer color from the **Layer color** drop-down menu.
- Click **OK**.

### Deleting a Layer

- From the main menu, select **View > Layer Properties**. This opens the **Layer Properties** dialog box.
- Select the layer you want to delete.
- Click the **Remove** button.
- If a dialog box appears asking to confirm the delete, click **Yes**.
- Click **OK**.

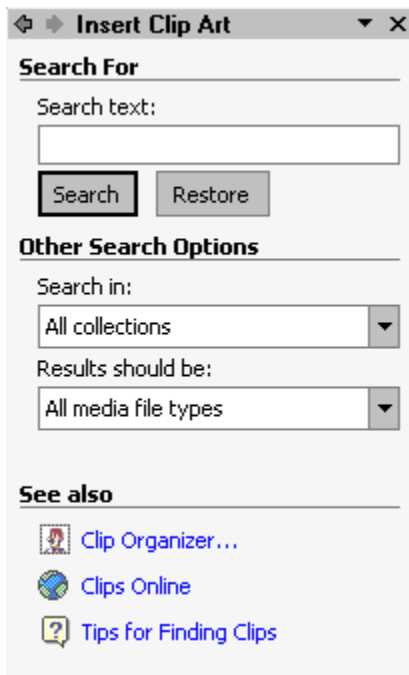
### Inserting Pictures

#### About the Insert Clip Art Task Pane

- The **Insert Clip Art** Task Pane provides access to Clip Art available from your collections, Office collections, or Web collections.
- Clip Art includes **drawings, photos, sounds, animations**, and other media files that can enhance your drawing.

## Displaying the Insert Clip Art Task Pane

- From the main menu, select **Insert > Picture > Clip Art**:



**Note:** When you first use the **Insert Clip Art** Task Pane, you will be prompted to add clips to your **Clip Organizer**. This will search your computer for media clips and organize your clips into the **My Collections** folder:



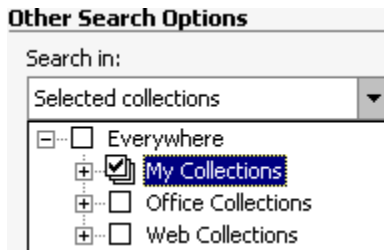
## Searching for Clip Art

- Enter descriptive keywords to search for clips in the **Search text** textbox.
- Click **Search**.

**Note:** To do another search, click the **Modify** button at the bottom of the **Insert Clip Art** Task Pane.

## Customizing a Clip Art Search

- Select a collection from the **Search in** drop-down menu. Visio will narrow its Clip Art search to the collections you select:



- Select a media type from the **Results should be** drop-down menu. Visio will narrow its Clip Art search to the media file types you select.

---

## Using the Clip Organizer

- The Clip Organizer organizes Clip Art into the **My Collections**, **Office Collections**, and **Web Collections** folders. The Clip Organizer is useful for browsing through clip collections and managing Clip Art options.

### To display the Clip Organizer:

- Click the **Clip Organizer** link at the bottom of the **Insert Clip Art** Task Pane.

---

## Searching for Clips Online

- The **Web Collections** Clip Art folder automatically updates its Clip Art from the Web if you have an open Internet connection. You can also search for online clips directly.

### To search for clips online:

- Click the **Clips Online** link at the bottom of the **Insert Clip Art** Task Pane.

**Note:** If this is the first time you are accessing clips online, you will be asked to accept a User Agreement.

---

## Inserting Clip Art

- From your search results, click on the clip you want.

*OR*

- Click the down arrow next to the clip you want.
- Click **Insert**.

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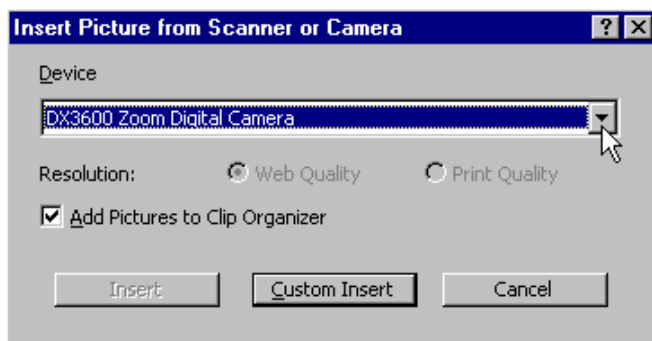
### Inserting a Picture from a File

- From the main menu, select **Insert > Picture > From File**. This opens the **Insert Picture** dialog box.
- Locate and select the picture you want.
- Click **Open**.

---

### Inserting a Picture from a Scanner or Camera

- From the main menu, select **Insert > Picture > From Scanner or Camera**. This opens the Insert Picture from Scanner or Camera dialog box:



- Select the device from the drop-down menu that contains the pictures you want.
- Click the **Custom Insert** button.
- Locate and select the picture(s) you want.
- Click **Get Pictures**.

**Note:** If you don't want your pictures added to the **Clip Organizer**, uncheck the **Add Pictures to Clip Organizer** box.

## Review Questions

### How would you:

- 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?

SAMPLE

- 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?

SAMPLE

## Setting up and Editing Pages

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

- Insert a New Page
- Create a Background Page
- Assign a Background Page
- Navigate Pages
- Rename a Page
- Reorder Pages
- Delete a Page
- Use the View Toolbar
- Show and Hide Rulers
- Show and Hide the Grid
- Add Guides
- Show and Hide Guides
- Show and Hide Page Breaks
- Use the Pan & Zoom Window
- Zoom in and out of a Drawing
- Use the Size & Position Window
- Use the Drawing Explorer Window
- Merge Anchored Windows
- Set a Drawing Scale
- Copy Items
- Copy a Drawing
- Cut Items
- Paste Items
- Use Paste Special
- Use Find and Replace
- Use Undo and Redo
- Check Spelling

### Managing Pages

---

#### Inserting a New Page

- From the main menu, select **Insert > New Page**.

*OR*

- Right-click on a page tab at the bottom-left of the drawing page:



- From the pop-up menu, select **Insert Page**.
- This opens the **Page Setup** dialog box.
- Enter a name for the page in the **Name** box.
- Click **OK**.

---

### Creating a Background Page

- Each (foreground) page in Visio may contain a background page. A background page is similar to a master page, where elements placed on a background page appear on every drawing page to which the background page is assigned.

To create a background page:

- From the main menu, select **Insert > New Page**.

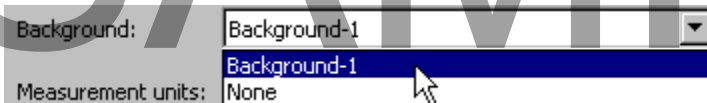
*OR*

- Right-click on a page tab at the bottom-left of the drawing page.
- From the pop-up menu, select **Insert Page**.
- This opens the **Page Setup** dialog box.
- Select the **Background** option button.
- Enter a name for the background page in the **Name** box.
- Click **OK**.

---

### Assigning a Background Page

- Display the foreground page for which you want to assign a background.
- From the main menu, select **File > Page Setup**.
- Click the **Page Properties** tab.
- Select the background you want to assign from the **Background** drop-down menu:



- Click **OK**.

---

### Navigating Pages

- Click the page tab at the bottom-left of the drawing page of the page you want to view.

---

### Renaming a Page

- Right-click on the page tab at the bottom-left of the drawing page of the page you want to rename.
- From the pop-up menu, select **Rename Page**.
- Type a new name.
- Press the **Enter** key on your keyboard.

---

### Reordering Pages

- Click and drag the page tab at the bottom-left of the drawing page to the location you want.

*OR*

- Right-click on a page tab at the bottom-left of the drawing page.
- From the pop-up menu, select **Reorder Pages**. This opens the **Reorder Pages** dialog box.
- Select the page you want to reorder.
  
- Click the **Move Up** or **Move Down** button to reach the desired location.
- Click **OK**.

**Note:** Background pages cannot be reordered.

---

### Deleting a Page

- Right-click on the page tab at the bottom-left of the drawing page of the page you want to delete.
- From the pop-up menu, select **Delete Page**.

### Using Page View Tools

---

#### Using the View Toolbar

- The **View** toolbar provides quick access to page view settings.

**To display the View toolbar:**

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



---

### Showing and Hiding Rulers

- Click the **Rulers** button on the **View** toolbar

*OR* from the main menu, select **View > Rulers**.

---

### Showing and Hiding the Grid

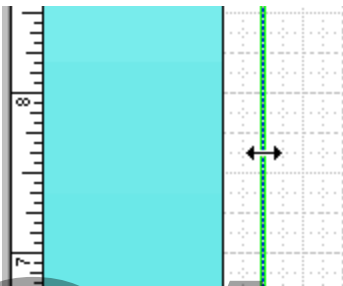
- Click the **Grid** button on the **View** toolbar

*OR* from the main menu, select **View > Grid**.

---

### Adding Guides

- Click the **Pointer Tool** on the **Standard** toolbar.
- Click on the horizontal or vertical ruler and drag a guide to the drawing page:



---

### Showing and Hiding Guides

- Click the **Guides** button on the **View** toolbar

*OR* from the main menu, select **View > Guides**.

---

### Showing and Hiding Page Breaks

- Page breaks are indicated by gray lines on a Visio drawing page.

**To show page breaks:**

- Click the **Page Breaks** button on the **View** toolbar

**OR** from the main menu, select **View > Page Breaks**.

---

### Using the Pan & Zoom Window

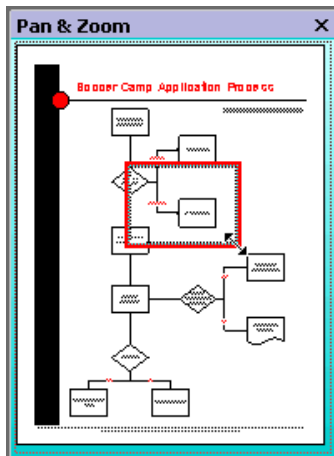
- The **Pan & Zoom Window** is useful for zooming in on different sections of a large diagram.

**To use the Pan & Zoom Window:**

- Click the **Pan & Zoom Window** button on the **View** toolbar

**OR** from the main menu, select **View > Pan & Zoom Window**.

- Click and drag the red box in the **Pan & Zoom Window** over the area you want to magnify:



---

### Zooming in and out of a Drawing

- Click the down arrow on the **Zoom** box on the **Standard** toolbar.
- Select the magnification you want from the drop-down menu.

---

### Using the Size & Position Window

- The **Size & Position Window** allows you to view and set the coordinates, dimensions, and position of shapes on the drawing page.

**To use the Size & Position Window:**

- Click the **Size & Position Window** button on the **View** toolbar

**OR** from the main menu, select **View > Size & Position Window**.

- Click the **Pointer Tool** button on the **Standard** toolbar.
- Select the shape for which you want to view size and position attributes.

**Note:** To change shape attributes, click the attribute you want to change and type the value you want:

Size & Position - Decision.12	
X	3.13 in.
Y	7.25 in.
Width	1 in.
Height	0.75 in.
Angle	0 deg.
Pin Pos	Center-Center

### Using the Drawing Explorer Window

- The **Drawing Explorer Window** allows you to manage your Visio drawing in a hierarchical structure. The Drawing Explorer Window is useful for navigating to specific items in your drawing and editing and deleting pages and shapes.

**To use the Drawing Explorer Window:**

- Click the **Drawing Explorer Window** button on the **View** toolbar

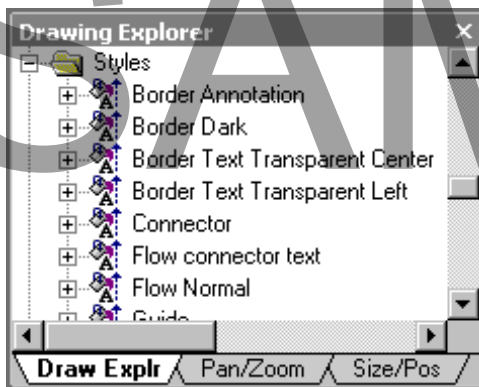
**OR** from the main menu, select **View > Drawing Explorer Window**.

### Merging Anchored Windows

- With multiple page view and management (anchored) windows open, the drawing page can become cluttered.

**To merge anchored windows:**

- Click and drag the title bar of one anchored window into another:



## Setting a Drawing Scale

- **Drawing Scales** are useful when a drawing needs to be set to scale, so that a measurement in the drawing represents a measurement in the real world.

### To set a Drawing Scale:

- Display the page for which you want to assign a drawing scale.
- From the main menu, select **File > Page Setup**.
- Click the **Drawing Scale** tab.
- Select the **Pre-defined scale** or **Custom scale** option button.
- For a pre-defined scale, select the type of scale you want and the scale ratio from the **Pre-defined** scale drop-down menus.
- For a custom scale, type a scale ratio in the **Custom scale** box.
- Click **OK**.

---

## Editing Pages

---

### Copying Items

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the shape or text you want to copy.
- Click the **Copy** button on the **Standard** toolbar

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

*OR* from the main menu, select **Edit > Copy**.

---

### Copying a Drawing Page

- Click the **Pointer Tool** on the **Standard** toolbar.
- Click on the drawing page.
- From the main menu, select **Edit > Copy Drawing**.

---

### Cutting Items

- Click the **Pointer Tool** on the **Standard** toolbar.
- Select the item you want to cut.
- Click the **Cut** button on the **Standard** toolbar

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

*OR* from the main menu, select **Edit > Cut**.

---

## Pasting Items

- Click on the location you want to paste the cut or copied item.
- Click the **Paste** button on the **Standard** toolbar

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

**OR** from the main menu, select **Edit > Paste**.

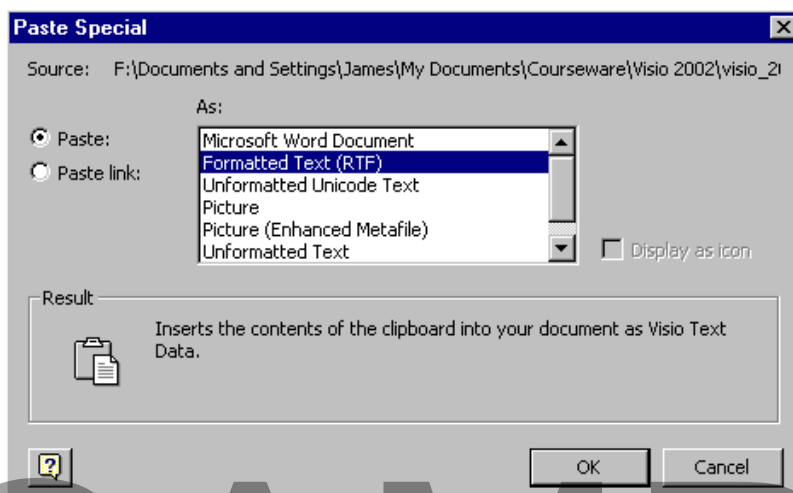
---

## Using Paste Special

- **Paste Special** allows you to link or embed text and objects, and paste text and objects in different formats.

### To use Paste Special:

- Click on the location you want to paste the cut or copied item.
- From the main menu, select **Edit > Paste Special**. This opens the **Paste Special** dialog box:



- Select the format you want from the **As** list.
- Click **OK**.

---

## Using Find and Replace

### To find text:

- From the main menu, select **Edit > Find**.
- Type in the text you want to find in the **Find what** box.
- Click **Find Next** to search for the text.

**Note:** Refine a search by checking boxes in the **Search in** and **Options** areas.

**To replace text:**

- From the main menu, select **Edit > Replace**.
- Type in the text you want to find in the **Find what** box.
- Type in the replacement text in the **Replace with** box.
- Click **Find Next** to search for the text.
- Click **Replace** to replace the single highlighted occurrence.
- Click **Replace All** to replace all occurrences.

---

**Using Undo and Redo**

**To undo the last action:**

- Click the **Undo** button on the **Standard** toolbar.

**To undo multiple actions:**

- Click the down arrow on the **Undo** button on the **Standard** toolbar.
- Click the last action you want to undo.

**To redo the last undo:**

- Click the **Redo** button on the **Standard** toolbar.

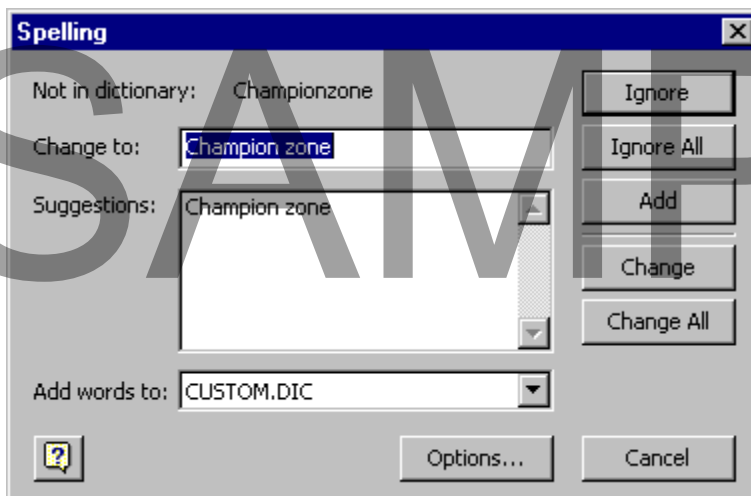
**To redo multiple undos:**

- Click the down arrow on the **Redo** button on the **Standard** toolbar.
- Click the last action you want to redo.

---

**Checking Spelling**

- From the main menu, select **Tools > Spelling**. If there are spelling errors, the **Spelling** dialog box will open:



- Click **Ignore** or **Ignore All** to ignore the suggested correction.

- Click **Change** or **Change All** to apply the suggested correction.
- Click **Add** to add the original spelling to the dictionary.
- Click **Cancel** to end the spell check.

## Review Questions

### How would you:

- Insert a New Page?
- Create a Background Page?
- Assign a Background Page?
- Navigate Pages?
- Rename a Page?
- Reorder Pages?
- Delete a Page?
- Use the View Toolbar?
- Show and Hide Rulers?
- Show and Hide the Grid?
- Add Guides?
- Show and Hide Guides?
- Show and Hide Page Breaks?
- Use the Pan & Zoom Window?
- Zoom in and out of a Drawing?
- Use the Size & Position Window?
- Use the Drawing Explorer Window?
- Merge Anchored Windows?
- Set a Drawing Scale?
- Copy Items?
- Copy a Drawing?
- Cut Items?
- Paste Items?
- Use Paste Special?
- Use Find and Replace?
- Use Undo and Redo?
- Check Spelling?

SAMPLE

## Sharing Drawings

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

- E-mail a Drawing to a Mail Recipient
- E-mail a Drawing to a Routing Recipient
- Preview a Drawing
- View Different Pages
- Zoom in and out of a Preview
- Exit Print Preview
- Set Paper Size
- Set Paper Orientation
- Use Print Zoom
- Select a Printer
- Change Printer Properties
- Set the Print Range
- Set the Number of Print Copies
- Send the Drawing to the Printer

## Sending Drawings

---

### E-mailing a Drawing to a Mail Recipient

- Sending a drawing to a mail recipient sends a Visio drawing as an attachment.

**To send a drawing to a mail recipient:**

- From the main menu, select **File > Send To > Mail Recipient (as Attachment)**.

### E-mailing a Drawing to a Routing Recipient

- Routing a drawing is useful when you want people to edit and add comments in a particular order. When you route a drawing, an e-mail is generated instructing e-mail recipients to route the presentation to the next routing recipient on the routing slip.

**To route a drawing:**

- From the main menu, select **File > Send To > Routing Recipient**. This opens the **Routing Slip** dialog box:

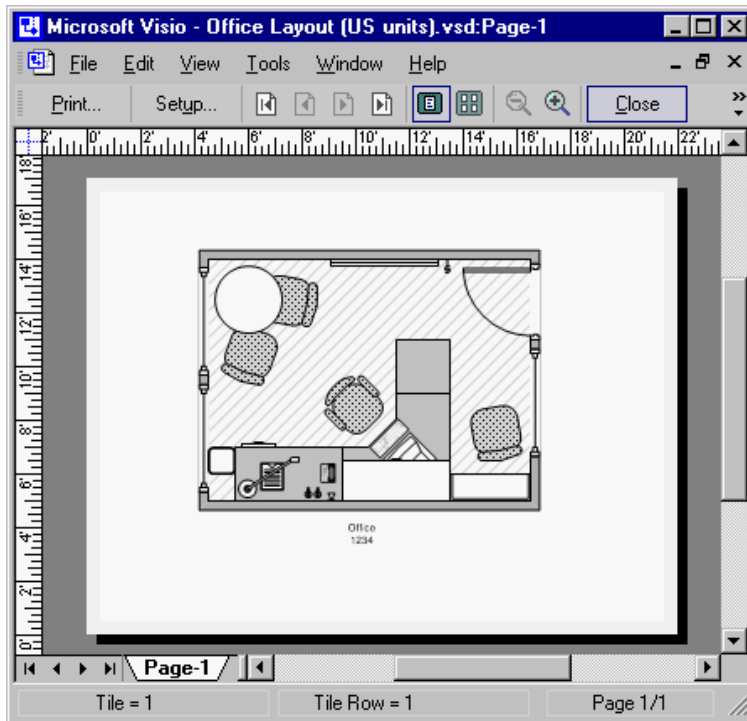


- Click the **Address** button. This opens the **Address Book** dialog box.
- Select the e-mail recipients to whom you wish to route the Visio drawing.
- Click **OK**.
- Type a message in the **Message text** box.
- Select the routing options you want from the **Route to recipients** area.
- Click Add Slip.
- From the main menu, select **File > Send To > Next Routing Recipient**. This opens a **Send** dialog box.
- Click **OK** to send the drawing to the first routing recipient.

## Using Print Preview

### Previewing a Drawing

- Prior to printing, you can see how each page in your drawing will look by using **Print Preview**:



**To preview a drawing:**

- Click the **Print Preview** button on the **Standard** toolbar  
*OR* from the main menu, select **File > Print Preview**.

---

**Viewing Different Pages**

- Click the page tabs at the bottom-left of the print preview  
*OR* click the **Previous Tile**, **Next Tile**, **First Tile**, or **Last Tile** buttons:



---

**Zooming in and out of a Preview**

- Click anywhere on the drawing page in **Print Preview** mode.

---

**Exiting Print Preview**

- Click the **Close** button on the **Print Preview** toolbar.

## Using Print Setup

---

### Setting Paper Size

- From the main menu, select **File > Page Setup**.
- Select a paper size from the **Paper size** drop-down menu on the **Print Setup** tab.
- Click **OK**.

### Setting Paper Orientation

- From the main menu, select **File > Page Setup**.
- Select a paper orientation option box in the **Paper orientation** area on the **Print Setup** tab.
- Click **OK**.

**Note:** For additional printing options, click **Setup**.

### Using Print Zoom

- **Print Zoom** allows you to change the size of your printout without changing the size of your drawing.

#### To use Print Zoom:

- From the main menu, select **File > Page Setup**.
- Select a zoom adjustment from the **Adjust to** drop-down menu

*OR* select the **Fit to** option box and enter the number of pages the drawing should fit to.

- Click **OK**.

## Printing the Drawing

---

### Selecting a Printer

- From the main menu, select **File > Print**. This opens the **Print** dialog box.
- Select a printer from the **Name** drop-down menu.

### Changing Printer Properties

- From the main menu, select **File > Print**. This opens the **Print** dialog box.

- Click the **Properties** button.
- Make the print property changes you want.

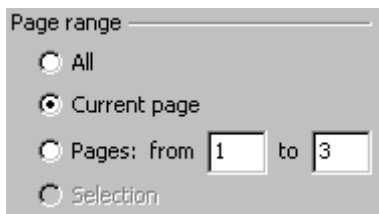
---

### Setting the Print Range

- Visio allows you to print a single page, multiple selected pages, or the entire drawing.

#### To set the print range:

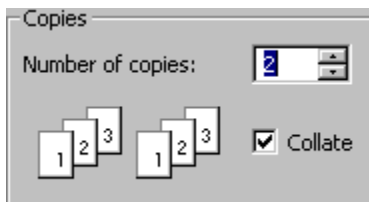
- From the main menu, select **File > Print**. This opens the **Print** dialog box.
- Check the appropriate box in the **Print Range** area:



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### Setting the Number of Print Copies

- From the main menu, select **File > Print**. This opens the **Print** dialog box.
- Click the up or down arrows next to the **Number of copies** box:



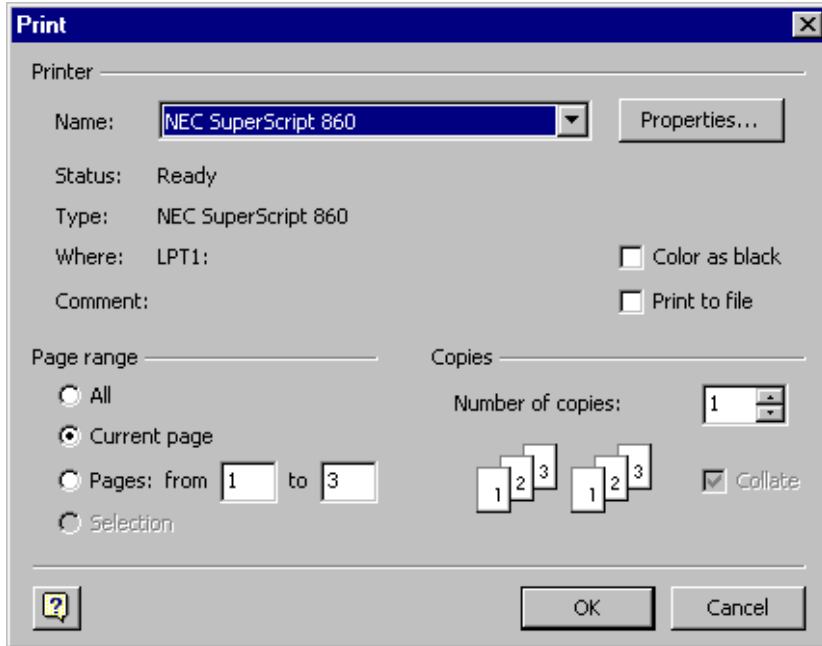
**Note:** Check the **Collate** box if you want to collate your print job.

---

### Sending the Drawing to the Printer

- From the main menu, select **File > Print**. This opens the **Print** dialog box:

SAMPLE



- Change the print settings you want.
- Click **OK**.

## Review Questions

### How would you:

- E-mail a Drawing to a Mail Recipient?
- E-mail a Drawing to a Routing Recipient?
- Preview a Drawing?
- View Different Pages?
- Zoom in and out of a Preview?
- Exit Print Preview?
- Set Paper Size?
- Set Paper Orientation?
- Use Print Zoom?
- Select a Printer?
- Change Printer Properties?
- Set the Print Range?
- Set the Number of Print Copies?
- Send the Drawing to the Printer?

## Customizing Visio 2002

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

- Open the Options Dialog Box
- Customize General Options
- Customize View Options
- Customize Save Options
- Customize Regional Options
- Customize Spelling Options
- Customize File Paths Options
- Customize Advanced Options
- Open the AutoCorrect Dialog Box
- Customize AutoCorrect Options
- Customize Autoformat Options
- Create a Custom Toolbar
- Add or Remove Commands from a Toolbar
- Customize Toolbar Options
- Reset a Toolbar
- Rename a Toolbar
- Delete a Toolbar

## Configuring Visio 2002 Options

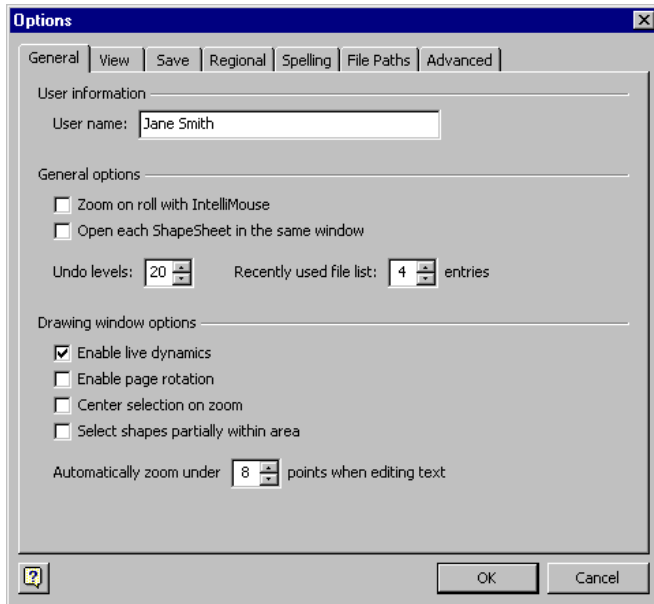
### Opening the Options Dialog Box

- The Visio **Options** dialog box allows you to modify **user name** settings, **text and display** options, **save** settings, **units of measure**, **spelling** settings, and **default file paths**.

To open the Options dialog box:

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- From the main menu, select **Tools > Options**:



---

## Customizing General Options

- Click the **General** tab in the **Options** dialog box.

### To change the user name:

- Type a name in the **User name** box.
- Click **OK**.

### To zoom in and out of a drawing using an IntelliMouse:

- Check the **Zoom on roll with IntelliMouse** box.
- Click **OK**.

### To open ShapeSheets in the same window:

- Check the **Open each ShapeSheet in the same window** box.
- Click **OK**.

### To change the number of undos allowed:

- Click the up and down arrows next to the **Undo levels** box.
- Click **OK**.

### To change the number of recently used files displayed on the File menu and in the New Drawing Task Pane:

- Click the up and down arrows next to the **Recently used file list** box.
- Click **OK**.

### To set Drawing window options:

- Check the drawing window options you want in the **Drawing window options** area.
- Click **OK**.

---

### Customizing View Options

- Click the **View** tab in the **Options** dialog box.

#### To show selected Visio elements at startup:

- Check the elements you want Visio to open automatically at startup in the **Show** area.
- Click **OK**.

#### To set text quality:

- Select the text quality option buttons you want in the **Text quality** area.
- Click **OK**.

#### To set display options:

- Check the display options you want in the **Display options** area.
- Click **OK**.

#### To set the font size to display Greek text:

- Click the up and down arrows next to the **Greek text under** box.
- Click **OK**.

#### To set shape spacing on a stencil:

- Click the up and down arrows next to the **Character per line** box in the **Stencil spacing** area.
- Click the up and down arrows next to the **Lines per master** box in the **Stencil spacing** area.
- Click **OK**.

#### To set drawing page color settings:

- Select the color settings you want from the Drawing page, Drawing background, Stencil text, Stencil background, Print Preview background, and Full Screen background drop-down menus in the Color settings area.
- Click **OK**.

---

### Customizing Save Options

- Click the **Save** tab in the **Options** dialog box.

#### To set save options:

- Check the save options you want in the **Save options** area.

- Click **OK**.

**To set XML options:**

- Check the XML options you want in the **XML options** area.
- Click **OK**.

**To change the default file format in which to save Visio files:**

- Select a default Visio file format from the **Save Visio file as** drop-down menu in the **Default format** area.
- Click **OK**.

---

## Customizing Regional Options

- Click the **Regional** tab in the **Options** dialog box.

**To change the default unit of measure for the drawing page, text, angle of rotation, and duration:**

- Select a unit of measure from the **Page**, **Text**, **Angle**, and **Duration** drop-down menus in the **Default units** area.
- Click **OK**.

**To set Asian options:**

- Check the Asian options you want in the **Asian options** area.
- Click **OK**.

**To use the system default font:**

- Check the Always use the system default font box.

---

## Customizing Spelling Options

- Click the **Spelling** tab in the **Options** dialog box.

**To choose where to search for spelling errors:**

- Select the spelling location you want to search in the **Search** area.
- Click **OK**.

**To set spelling options:**

- Check the spelling options you want in the **Spelling** area.
- Click **OK**.

**To add a dictionary:**

- Click the **Add** button next to the **Custom dictionary** box.
- Locate and select the dictionary you want to add.
- Click **Open**.

- Click **OK**.

**To remove a dictionary:**

- Select the dictionary you want to remove in the **Custom dictionary** box.
- Click the **Remove** button.
- Click **OK**.

---

## Customizing File Paths Options

- **File Paths** specify the default Visio file save locations.

**To specify default file locations for Visio drawings, templates, stencils, help files, add-ons, start-up files, and filters:**

- Click the **File Paths** tab in the **Options** dialog box.
- Type the default file location you want for the Visio file type you want to change.
- Click **OK**.

---

## Customizing Advanced Options

- Click the **Advanced** tab in the **Options** dialog box.

**To change user settings:**

- Check the user settings you want in the **User settings** area.
- Click **OK**.

**To change developer settings:**

- Check the developer settings you want in the **Developer settings** area.
- Click **OK**.

**To set freeform drawing options:**

- Click and drag the **Precision** and **Smoothing** slide indicators to the settings you want.
- Click **OK**.

## Configuring AutoCorrect Options

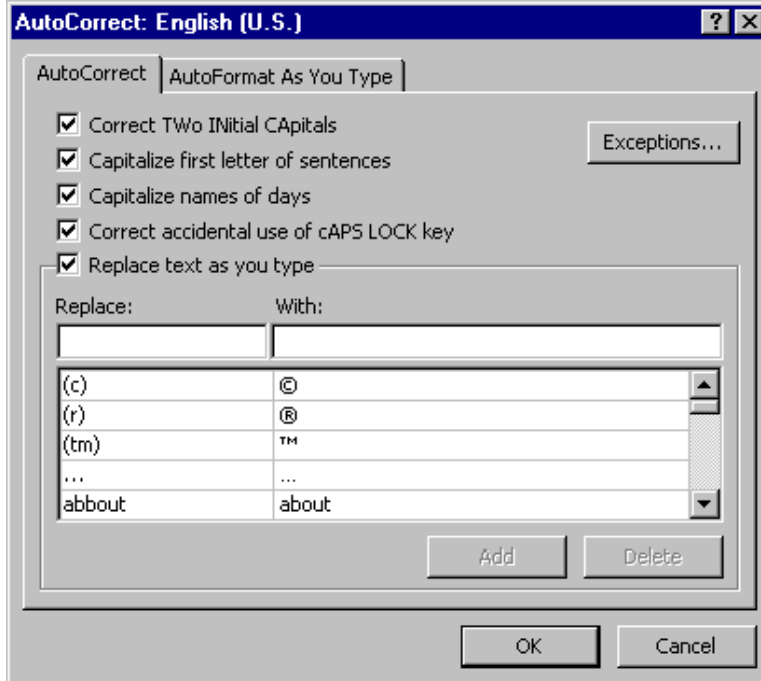
---

### Opening the AutoCorrect Dialog Box

- The Visio **AutoCorrect** dialog box allows you to modify settings for correcting text automatically.

**To open the AutoCorrect dialog box:**

- From the main menu, select **Tools > AutoCorrect Options:**



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### Customizing AutoCorrect Options

- Click the **AutoCorrect** tab on the **AutoCorrect** dialog box.

#### To automatically correct two consecutive uppercase letters:

- Check the **Correct TWo INitial CAPitals** box.
- Click **OK**.

#### To automatically capitalize the first letter of a sentence:

- Check the **Capitalize first letter of sentences** box.
- Click **OK**.

#### To automatically capitalize days of the week names:

- Check the **Capitalize names of days** box.
- Click **OK**.

#### To automatically correct accidental capitalization:

- Check the **Correct accidental use of cAPS LOCK key** box.
- Click **OK**.

#### To stop automatically correcting words as you type:

- Uncheck the **Replace text as you type** box.
- Click **OK**.

**To add custom words to replace and correct as you type:**

- Type the word you want to replace in the **Replace** box.
- Type the replacement word in the **With** box.
- Click **Add**.
- Click **OK**.

---

### **Customizing Autoformat Options**

- Click the AutoFormat As You Type tab in the AutoCorrect dialog box.

**To replace text as you type:**

- Check the AutoFormat option you want to use in the **Replace as you type** area.
- Click **OK**.

---

## **Customizing Toolbars**

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### **About Toolbar Customization Options**

- Toolbars contain **buttons**, **drop-down menus**, or a combination of both. You can add or delete toolbar buttons according to your customization preferences and most commonly used tasks.

---

### **Creating a Custom Toolbar**

- From the main menu, select **Tools > Customize**. This opens the **Customize** dialog box:

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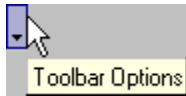


- Click the **Toolbars** tab.
- Click **New**. This opens the **New Toolbar** dialog box.
- Enter a toolbar name.
- Click **OK**. This opens a blank toolbar next to the **Customize** dialog box.
- Click the **Commands** tab.
- Select a category from the **Categories** list.
- Select a toolbar button from the **Commands** list.
- Click on the **Description** button to read a description of the toolbar button.
- Drag a toolbar button out of the **Commands** list, into your toolbar.
- Repeat this step to add additional toolbar buttons to the custom toolbar.
- Click **Close**.

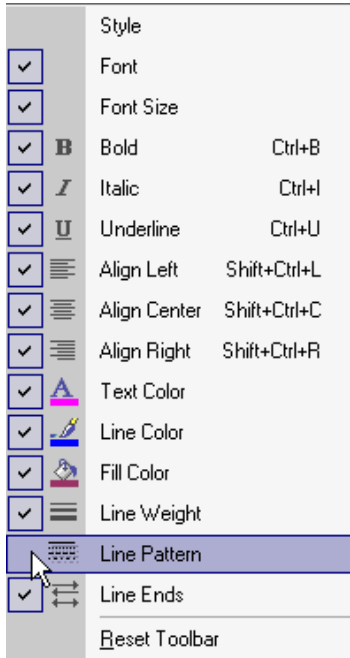
**Note:** Click the **Modify Selection** button to change the name or icon of a toolbar button on the custom toolbar. Other custom menu options are also available.

### **Adding or Removing Commands from a Toolbar**

- Display the toolbar you want to customize.
- Click the **Toolbar Options** button at the right-end of the toolbar:



- From the drop-down menu, select **Add or Remove Buttons > (Toolbar Name)**.
- Check or uncheck the commands you want to add or remove:



**OR**

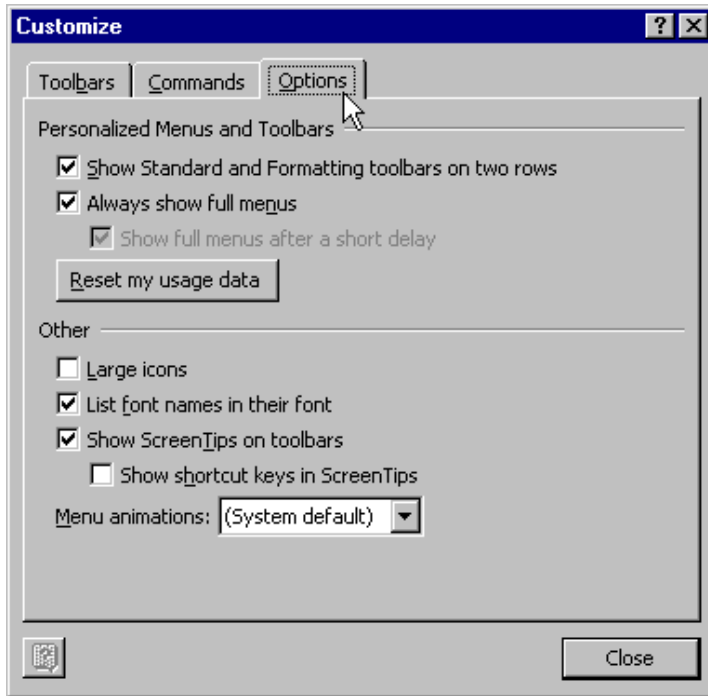
- Display the toolbar you want to customize.
- Click the **Toolbar Options** button at the right-end of the toolbar.
- Select **Add or Remove Buttons > Customize**. This opens the Customize dialog box.
- Click the **Commands** tab.
- Select a category from the **Categories** list.
- Click and drag a toolbar button out of the **Commands** list into a toolbar, to add a toolbar button

**OR** click and drag a toolbar button out of a toolbar into the **Commands** box, to delete a toolbar button.

## Customizing Toolbar Options

- From the main menu, select **Tools > Customize**. This opens the **Customize** dialog box.

- Click the **Options** tab:



- Make the toolbar customizations you want.
- Click **Close**.

---

### Resetting a Toolbar

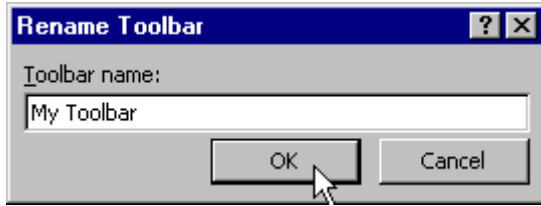
- From the main menu, select **Tools > Customize**. This opens the **Customize** dialog box:
- Click the **Toolbars** tab.
- Select the toolbar you want to reset.
- Click **Reset**.
- Click **Close**.

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### Renaming a Toolbar

- From the main menu, select **Tools > Customize**. This opens the **Customize** dialog box:
- Click the **Toolbars** tab.
- Select the toolbar you want to rename.

- Click **Rename**. This opens the **Rename Toolbar** dialog box:



- Enter a new name for your toolbar.
- Click **OK**.
- Click **Close**.

**Note:** You can only rename a **custom** toolbar.

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### Deleting a Toolbar

- From the main menu, select **Tools > Customize**. This opens the **Customize** dialog box:
- Click the **Toolbars** tab.
- Select the toolbar you want to delete.
- Click **Delete**.
- Click **OK** to delete the toolbar.
- Click **Close**.

**Note:** You can only delete a **custom** toolbar.

### Review Questions

#### How would you:

- Open the Options Dialog Box?
- Customize General Options?
- Customize View Options?
- Customize Save Options?
- Customize Regional Options?
- Customize Spelling Options?
- Customize File Paths Options?
- Customize Advanced Options?
- Open the AutoCorrect Dialog Box?
- Customize AutoCorrect Options?
- Customize Autoformat Options?
- Create a Custom Toolbar?

- Add or Remove Commands from a Toolbar?
- Customize Toolbar Options?
- Reset a Toolbar?
- Rename a Toolbar?
- Delete a Toolbar?

SAMPLE