



University Information
Technology Services

Microsoft Visio 2010

Flow Charting Software

An Introduction

University Information Technology Services

Outreach, Training, Learning Technologies &
Video Production

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Introduction

Microsoft Visio is flowcharting software that can be used to represent processes, workflows, networks, office organizations, data flows, cause and effect diagrams, timelines, floor plans, electrical circuits, charts, and more. This booklet covers the creation of a flowchart, an organizational chart, and a timeline.

The Microsoft Office 2010 Interface

The Ribbon

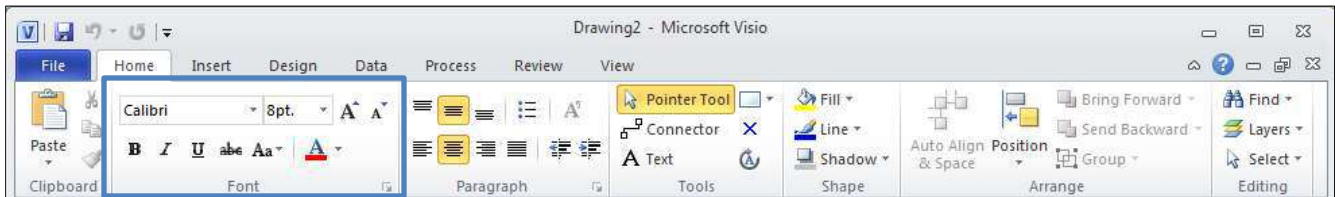


Figure 1 - The Ribbon

The ribbon is a panel that contains functional groupings of buttons and drop-down lists organized by tabs. The ribbon is designed to help you quickly find the commands that you need to complete a task.

The ribbon is made up of a set of tabs that pertain to the different functionalities of Visio, such as designing pages, inserting objects onto pages, or linking data to shapes. Each tab is further divided into logical groups (of buttons), such as the *Font* group shown above. There are also “contextual tabs” that appear, depending on what you are working on at that time. For example, if you insert pictures, the Picture Tools tab appears whenever a picture is selected (see Figure 2).

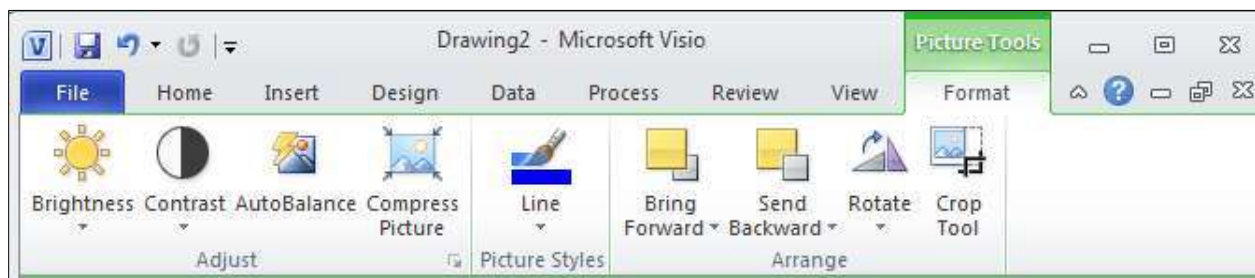


Figure 2 - Contextual Tab

The File tab



Figure 3 - File Tab

The **File** tab provides a centralized location called the Microsoft Office Backstage View, for all tasks related to Visio file management, which includes opening, creating, closing, sharing, saving, printing, converting to PDF, and emailing. The Backstage View also allows for viewing document properties, removing personal information, and reducing the file size by removing unused items.

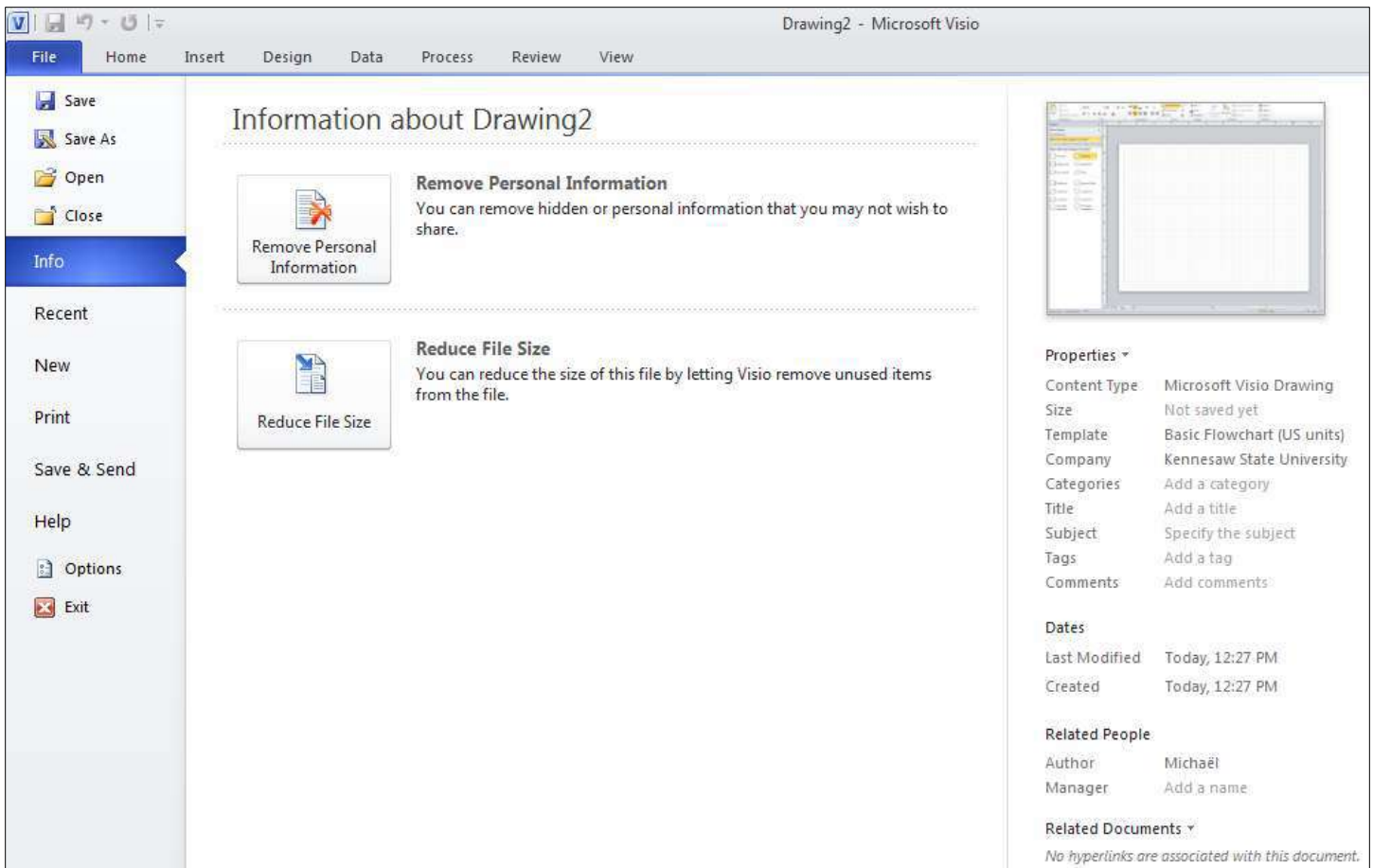


Figure 4 – File Tab

Flowcharts

Creating a New Flowchart

1. Click on the **File** tab.
2. Choose **New**.
3. Select the **Flowchart** template category.



Figure 5 - Flowchart Template Category

4. Select the flowchart of your choice.

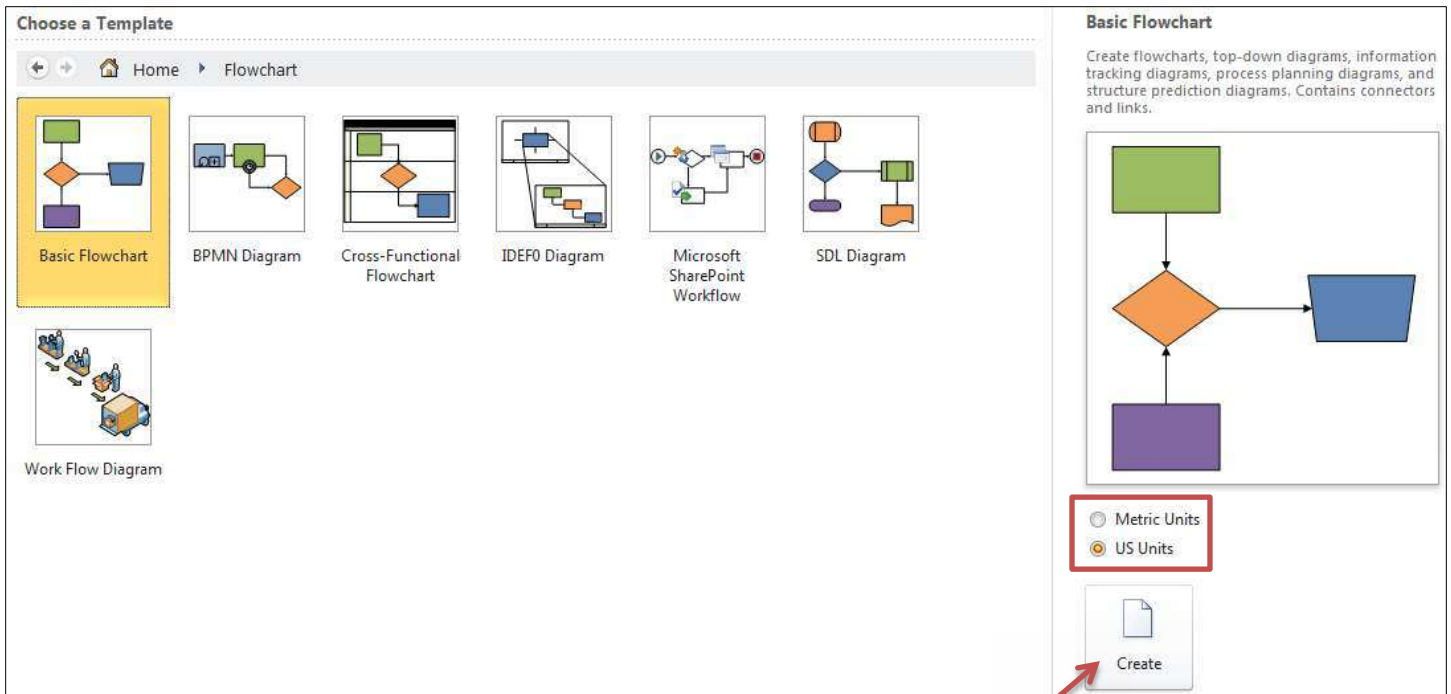


Figure 6 - Flowchart Templates

5. Select **Metric** or **US Units**.
6. Click on the **Create** button.

Building the Flowchart

1. Click and drag a shape from the **Shapes** window onto the drawing page.

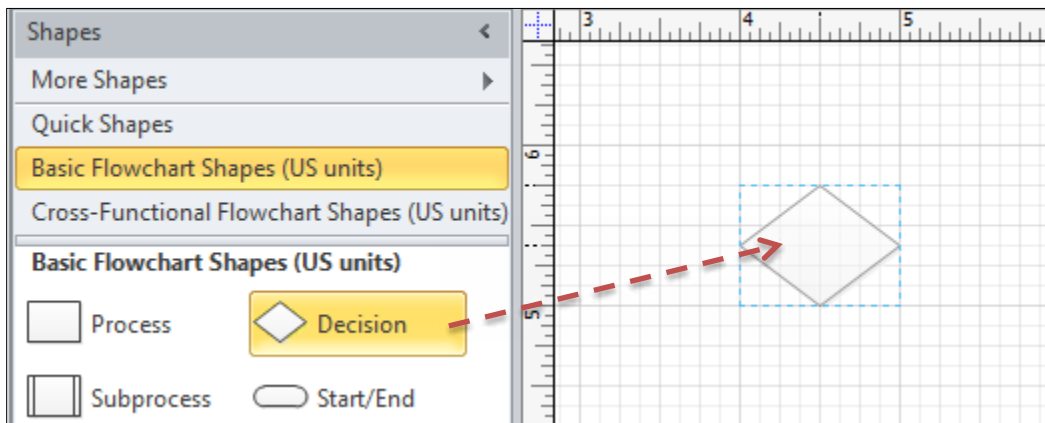



Figure 7 - Inserting Shapes

2. Repeat the process until all the shapes for the flowchart have been placed.
3. Click the **Connector Tool** on the ribbon.  Connector
4. Click to select a shape on the drawing page. Connecting arrows appear around the shape.

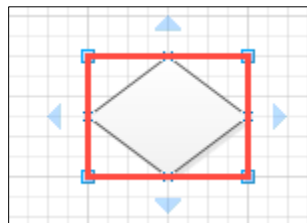


Figure 8 - Connecting Arrows

5. Place the mouse cursor over an arrow.

You have the following three options to connect the shape to other shapes: automatically connect to a nearby shape, create and connect to a new shape, or manually connect to any shape on the drawing page.

5.1. To automatically connect to a nearby shape, click on the blue arrow to confirm the connection.

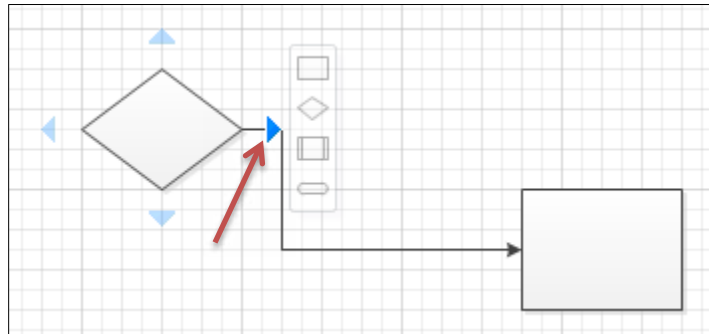


Figure 9 - Connecting to Nearby Shape

5.2. To create and connect to a new shape, click on a shape from the pop-up.

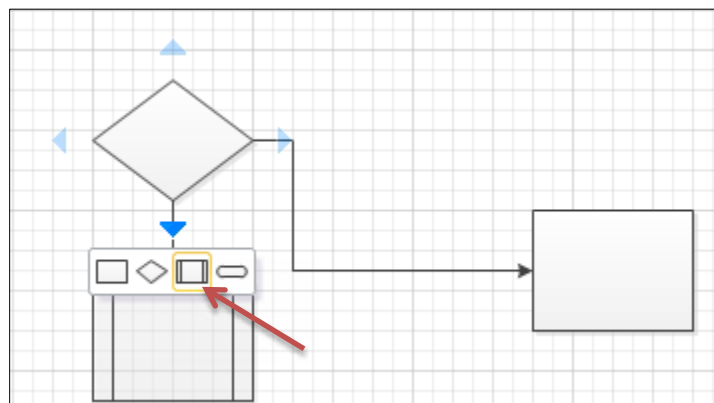


Figure 10 - Connecting to a New Shape

5.3. To manually connect to any shape on the drawing page, drag the blue arrow to connect to a **Glue Connection Point** on the other shape, and then release.



Figure 11 - Glue Connection Point

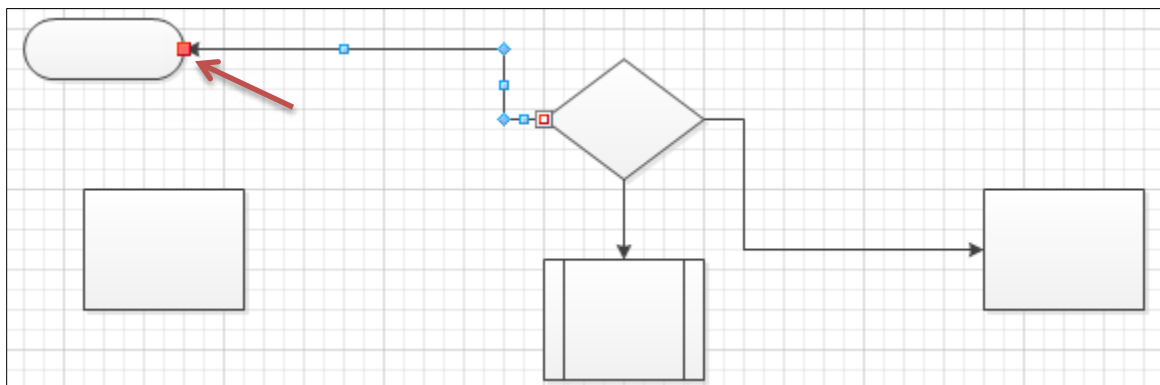


Figure 12 - Connecting Manually to Another Shape

Modifying the Flowchart

6. Altering a connecting line:

- 6.1. Click on the connecting line to select.
- 6.2. Move the **Midpoint** by dragging it on the screen.
- 6.3. Release the Midpoint.

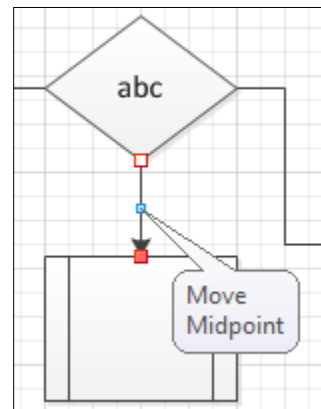


Figure 13 - Selected Connecting Line

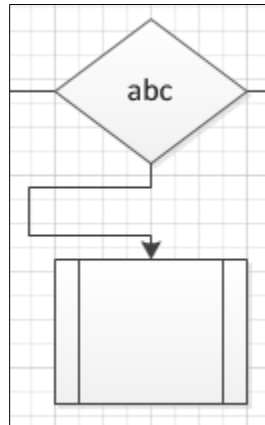


Figure 14 - Modified Connecting Line

7. Removing a connection:

- 7.1. Click on the connecting line to select.
- 7.2. Press the **Delete** key.

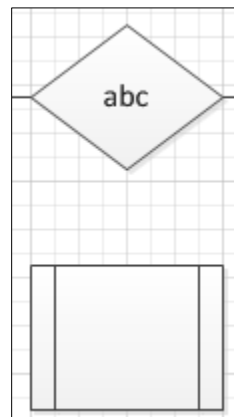


Figure 15 - Removed Connection

8. Redirecting a connecting line to a different connection point:

8.1. Click on the connecting line to select.

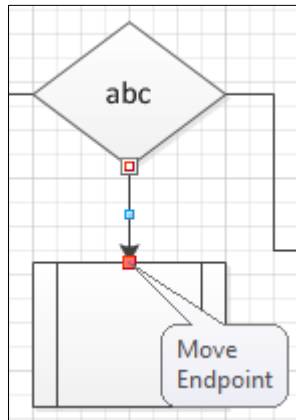


Figure 16 - Selected Connecting Line

8.2. Drag the **Endpoint** and align it with another connecting point of the shape.

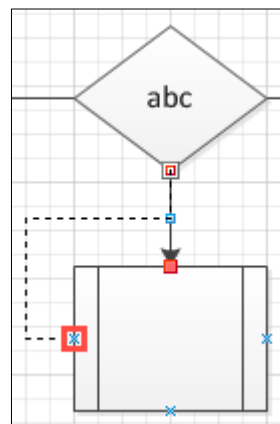


Figure 17 - Aligned Endpoint

8.3. Release at the connection point.

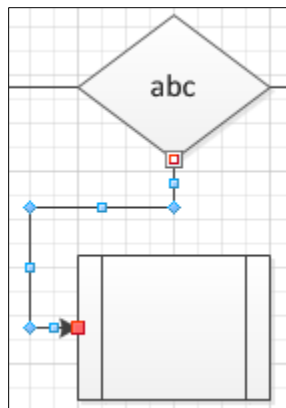


Figure 18 - Redirected Connection

9. **Connecting to a different shape:**

9.1. Click on the connecting line to select.

9.2. Drag the **Endpoint** and align it with a connecting point of a different shape.

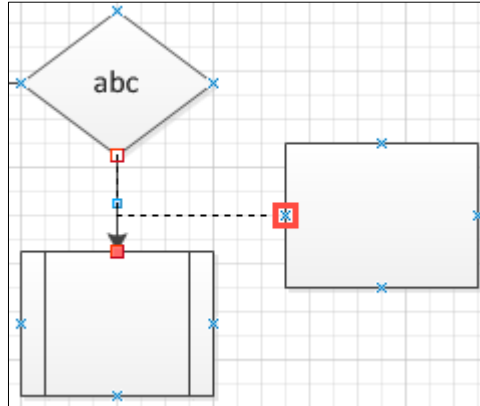


Figure 19 - Aligning Endpoint with Another Shape

9.3. Release at the connecting point.

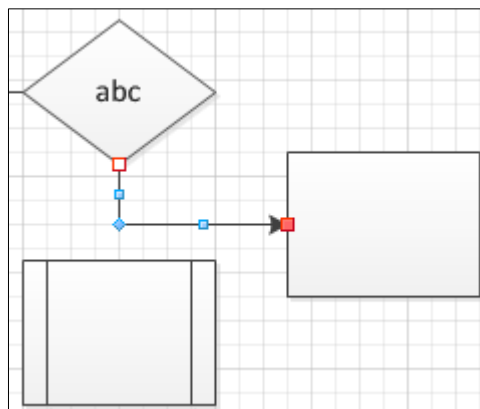


Figure 20 - Connected to a Different Shape

10. Moving a shape:

10.1. In the **Pointer Tool**  mode, click the shape to select.

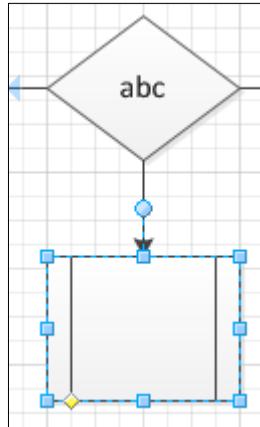


Figure 21 - Selected Shape

10.2. Drag the shape to a new location. *The connector remains attached.*

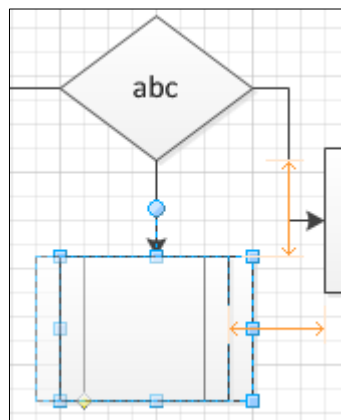


Figure 22 - Moving Shape to the Left

10.3. Release the shape at the desired location.

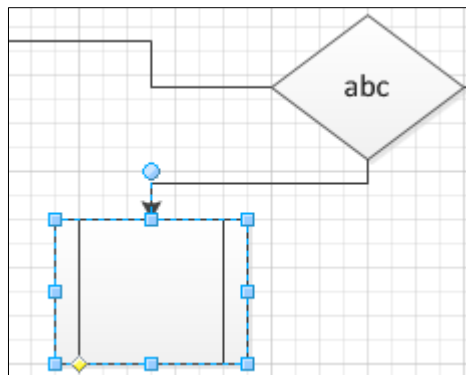


Figure 23 - Moved Shape

11. Deleting a shape:

11.1. Click on the shape to select.

11.2. Press the **Delete** key.

Modifying Shapes

12. Formatting a Shape:

12.1. Click on the shape to select.

12.2. Use the ribbon tools in the **Shape** group, under the Home tab.

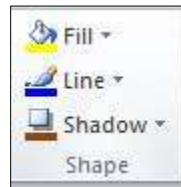


Figure 24 - Shape Formatting Tools

13. Editing the text in a shape:

13.1. Double-click the shape.

13.2. Enter the text.

13.3. Click outside the shape to confirm text entry.

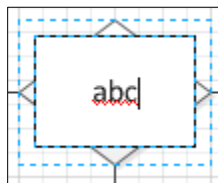


Figure 25 - Adding Text to Shape

14. Resizing a Shape:

- 14.1. Click on the shape to select.
- 14.2. Drag one of the sizing handles, and then release at the desired size.

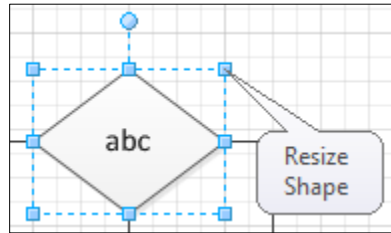


Figure 26 - Resizing a Shape

15. Rotating a shape:

- 15.1. Click on the shape to select.
- 15.2. Click and hold the blue dot above the shape.

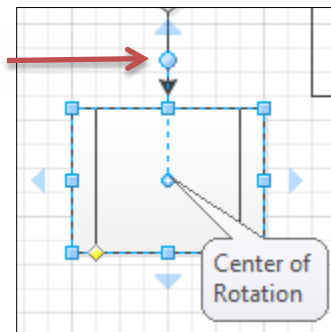


Figure 27 - Rotation Dot

- 15.3. Rotate the shape, and then release at the desired angle.

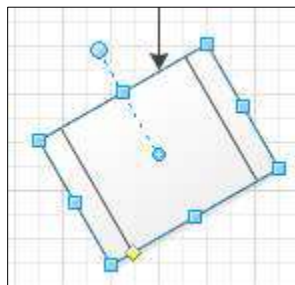


Figure 28 - Rotated Shape

Organizational Charts

Creating an Organizational Chart

1. Click on the **File** tab.
2. Choose **New**.
3. Select the **Business** template category.



Figure 29 - Business Template Category

4. Select **Organization Chart**.

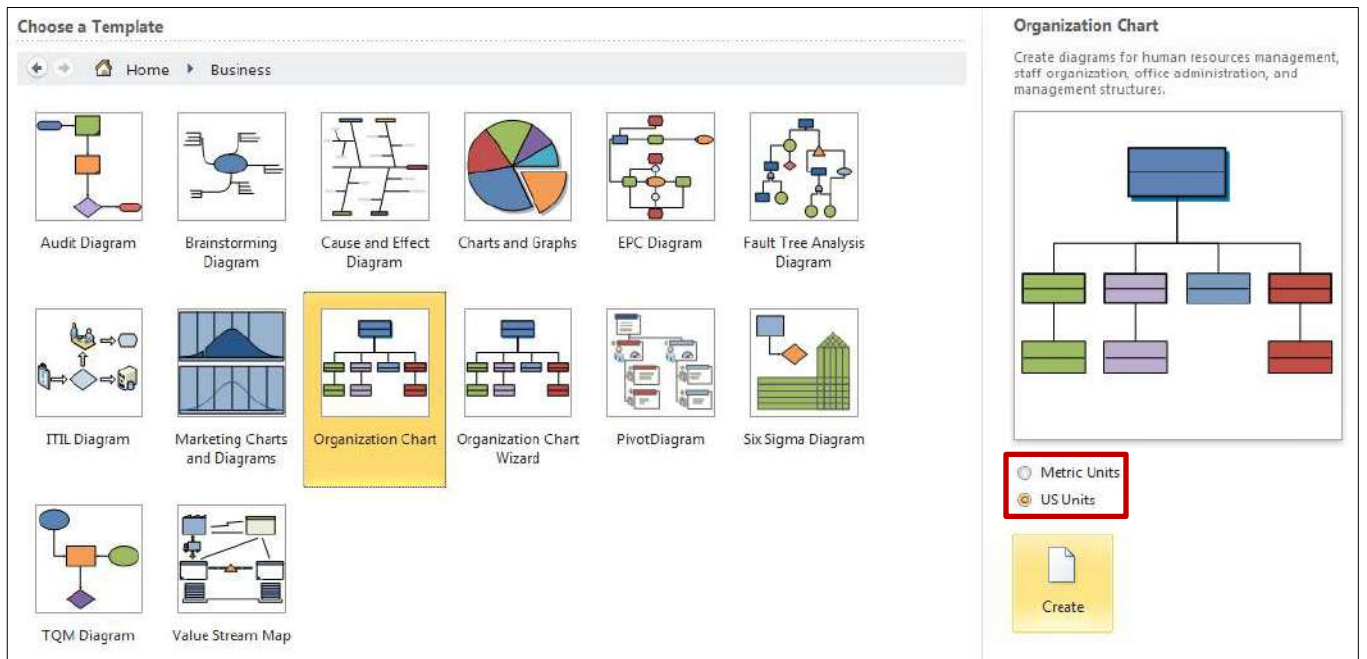


Figure 30 - Organization Chart Template

5. Select **Metric** or **US** units.

- Click on the **Create** button.

Building the Organizational Chart

- Click and drag an Executive or Manager shape from the **Shapes** window and drop it onto the drawing page.
- While the shape is still selected, type the name and the title of the person. *The page will zoom to 100%.* When done, click outside the shape to confirm the text entry.

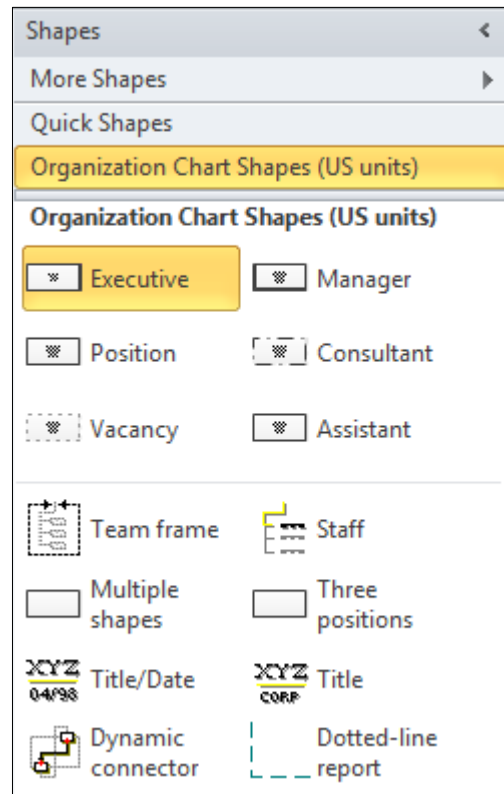



Figure 31 - Organization Chart Shapes

- Drag and drop a Position shape on top of the Executive or Manager shape. The Position shape will be placed below the Manager shape, with a connector between the two.
- Drag and drop another Position shape onto the Manager shape. *Any shape dropped onto another shape becomes subordinate of that shape.*
- Continue the process until you have added all the necessary positions.

Note: There may be times when you need to manually connect two shapes. To do this, click the **Connector Tool**  on the ribbon, position the **Connector Tool** over one of the connecting points of a shape (indicated by an X), and drag to a connecting point of another shape.

Manipulating Shapes

- To format a shape, select the shape and use the ribbon tools in the **Shape** group, under the **Home** tab.
- To edit the text on a shape, double-click the shape.
- To resize a shape, select the shape and drag one of the sizing handles.
- To move a shape, click and drag the shape to a new location. *The connector remains attached.*
- To delete a shape, select the shape and press the **Delete** key.
- To change the connecting point of a shape and a connecting line, click and drag the connecting line so that the end point of the line aligns with another connecting point of the shape.

Timeline

Creating a Timeline

1. Click on the **File** tab.
2. Choose **New**.
3. Select the **Schedule** template category.



Figure 32 - Schedule Template Category

4. Select **Timeline**.

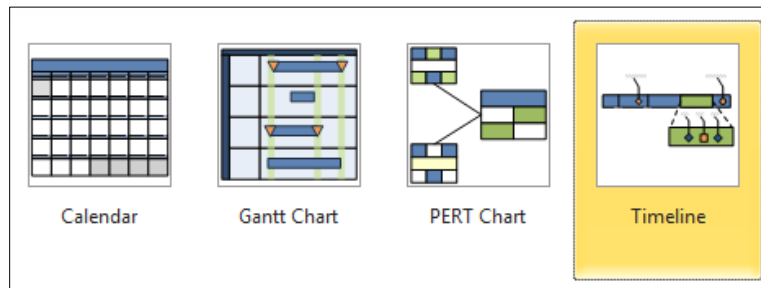


Figure 33 - Timeline Template

5. Select **Metric** or **US units**.
6. Click on the **Create** button.

Building the Timeline

7. Click and drag a **timeline style shape** (Block, Line, etc.) from the **Shapes** window onto the drawing page.

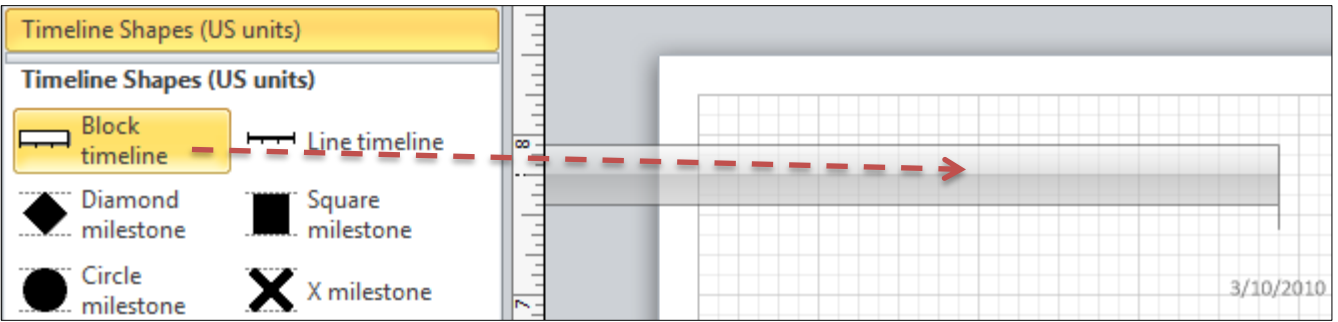


Figure 34 - Inserting a Timeline Style Shape

The **Configure Timeline** dialog box opens.

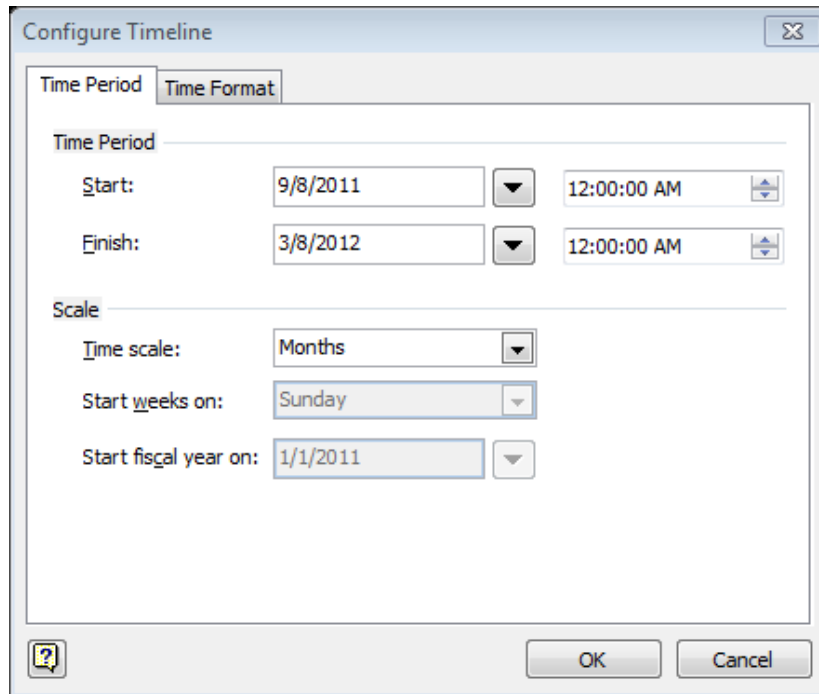


Figure 35 - Configure Timeline

8. In the **Time Period** section, set the *start* and *finish* dates of the timeline.
9. In the **Scale** section, select the unit of measure for the timeline.
10. Click the **Time Format** tab and make any necessary changes.
11. Click **OK**.

Note: To change any of these settings later, open the **Configure Timeline** dialog box again by right-clicking the timeline, and then clicking **Configure Timeline**.

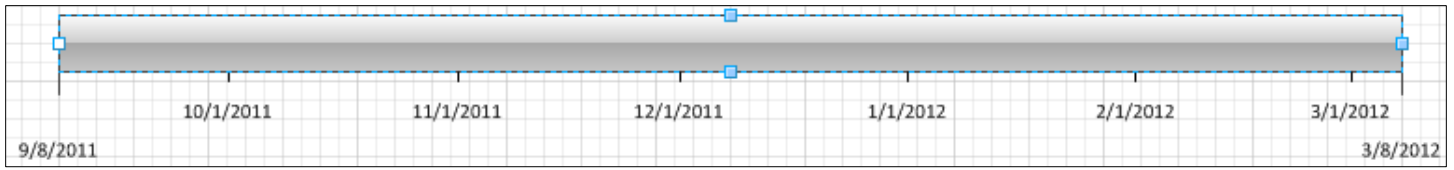


Figure 36 – Block Timeline

12. Drag and drop a **Milestone** shape onto the timeline.

The **Configure Milestone** dialog box appears.

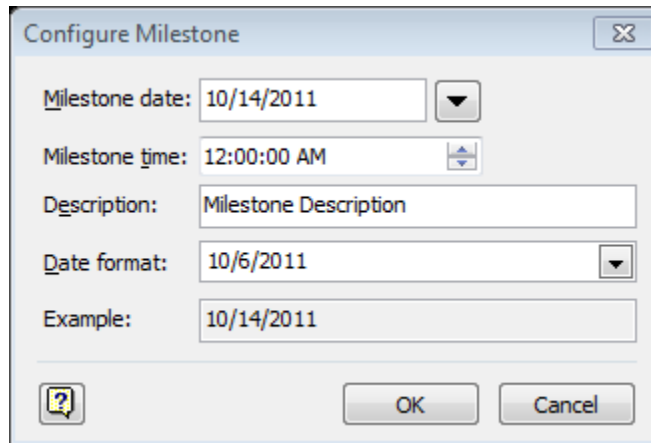


Figure 37 - Configure Milestone

13. Set the date and time for the milestone.

14. Enter a description for the milestone.

15. Set the date format.

16. Click **OK**.

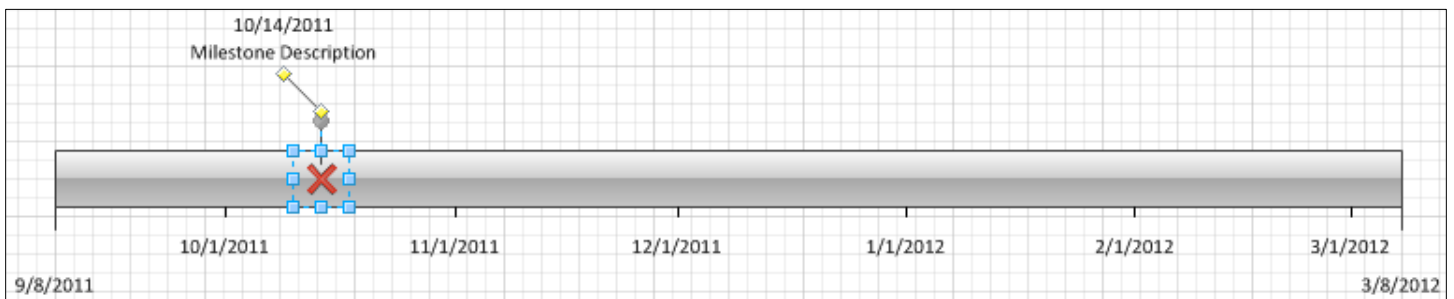


Figure 38 - Block Timeline with X Milestone

Note: You can quickly change the date or time of the milestone by clicking and dragging the milestone marker to a new spot on the timeline.

17. Click and drag an **interval shape** onto the timeline.

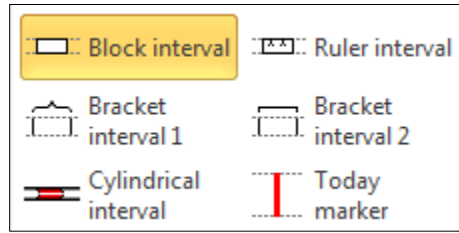


Figure 39 - Interval Shapes

The **Configure Interval** dialog box appears.

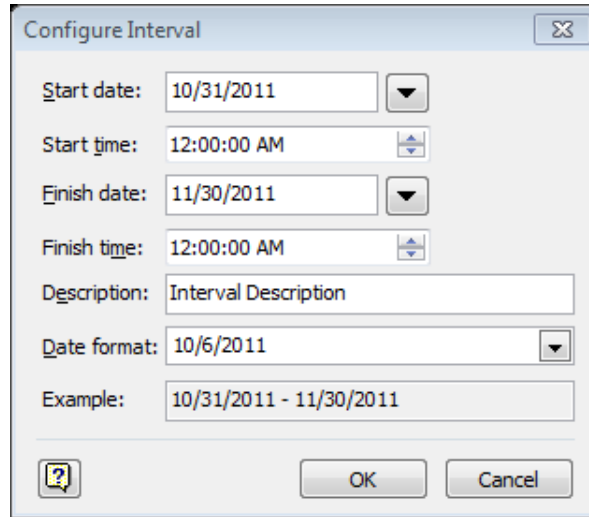


Figure 40 - Configure Interval

18. Enter the interval information in the **Configure Interval** dialog box, and then click **OK**.

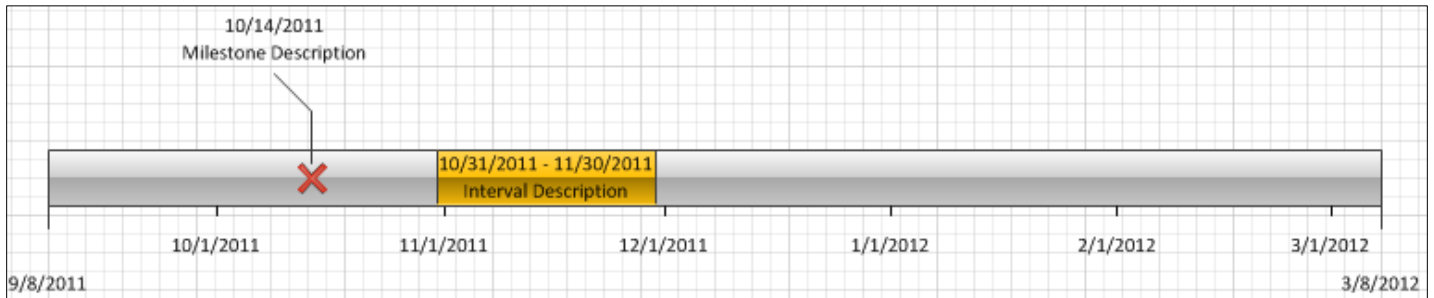


Figure 41 - Block Interval on Timeline

19. Modifying the Interval Shape

19.1. Moving the interval:

You can quickly change the interval by clicking and dragging the interval shape to a new spot on the timeline.

19.2. Moving the interval text:

You can move the interval text off the timeline by clicking and dragging the yellow control handle in the center of the interval shape.

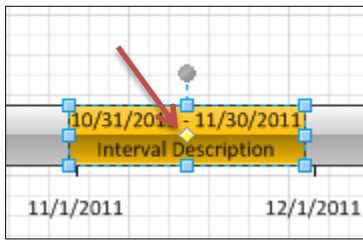


Figure 42 – Yellow Control Button Appears on Selected Shape

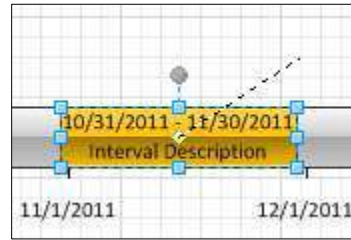


Figure 43 - Dragging the Yellow Control Button

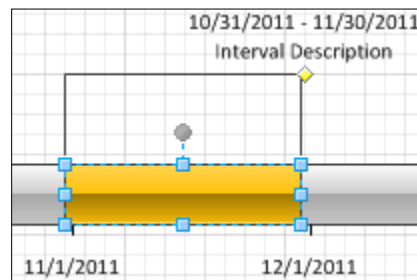


Figure 44 - Text is Moved Off

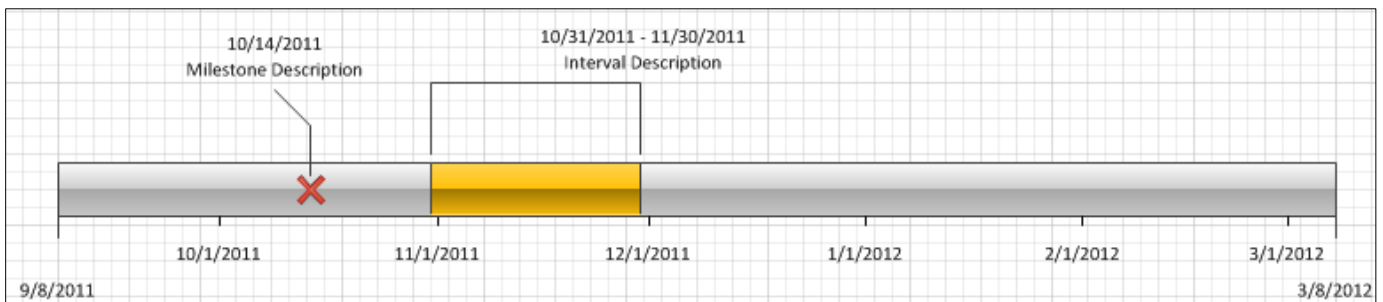


Figure 45 - Timeline with Text Off

Modifying the Timeline

You can edit any of the elements of the timeline by hovering the mouse pointer over that element, right-clicking, and selecting the appropriate item on the shortcut menu.

Saving a Diagram

You can save your diagram as a standard Visio file (drawing) that you can share with other people who have Visio. In addition, there are many different formats that you can save your diagram in directly from the **Save As** dialog box.

1. Click the **File** tab.
2. Click **Save As**, and then select a format in the **Save as type** list.

The different formats are useful for different ways of using or sharing your diagram.

- **Standard image file** (including JPG, PNG, TIF, and BMP formats)
- **Web page** (htm format)
Note that image files and other resource files are saved in a subfolder of the location where you save the HTM file.
- **PDF**
- **AutoCAD drawing**

Printing a Diagram

1. Click the **File** tab.
2. Click on **Print**.
3. To print the diagram, click **Print**.
4. In the **Print** dialog box, do the following:
 - 4.1. In the **Name** box, select the printer that you want (if it is not already selected).
 - 4.2. Under **Page range**, specify the pages in the drawing that you want to print.
 - 4.3. Under **Copies**, specify the number of copies that you want to print.
5. Click **OK** when you are ready to print.