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Alan Wright and Chris Roth

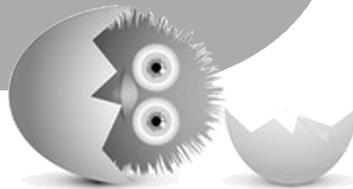
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Visio® 2013

ABSOLUTE BEGINNER'S GUIDE



Alan Wright and Chris Roth

que®

800 East 96th Street,
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Visio® 2013 Absolute Beginner's Guide

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Contents at a Glance

	Introduction	1
Part I	Visio 2013 Basics	7
1	Getting to Know Visio 2013.....	9
2	Finding Your Way Around the Interface.....	21
3	Working with Basic Diagrams.....	41
4	Taking Control of your Diagrams.....	61
5	Working with Shapes.....	81
6	Manage Shapes.....	101
Part II	Customizing	121
7	Connecting Shapes.....	123
8	Making Advanced Diagrams.....	143
9	Shapes: Customizing	167
10	Shapes: More Than Meets the Eye.....	185
11	Printing Visio Diagrams	203
Part III	Advanced	225
12	Sharing Visio Diagrams.....	227
13	Unique Needs: Touchscreens, Custom Templates, and Complex Printing Concerns.....	245
14	Using Data	265
15	Working with External Data and Data Graphics.....	287
16	Additional Visio Resources.....	303
17	Collaborating with Visio	315
18	Tips for Flowcharts, Process, and Block Diagrams.....	337
19	Tips for Working with Other Diagram Types.....	353
	Index.....	371

Table of Contents

INTRODUCTION

What This Book Covers.....	2
How This Book Is Organized.....	3
Conventions Used in This Book.....	3
Working with Visio Tools and Menus.....	4
Using Screen Illustrations.....	4
Web Addresses.....	4
Special Elements to Watch For.....	5

Part I Visio 2013 Basics..... 7

1 Getting to Know Visio 2013..... 9

What Is Visio?.....	10
Create a Basic Flowchart.....	10
What Else Can I Make?.....	13
Which Edition Should I Use?.....	16
What Is New in the 2013 Editions?.....	17
Improved Touch Support.....	18
Streamlined Layout.....	18
The New VSDX File Format.....	20

2 Finding Your Way Around the Interface..... 21

The Ribbon.....	22
Embrace the Tab.....	22
Contextual Tabs.....	23
Template Tabs.....	24
Customizing the Ribbon.....	24
Where Did That Command Go?.....	29
Important Features of the Visio Application.....	30
The Quick Access Toolbar.....	30
Context Menus.....	31
The Backstage.....	31
The Status Bar.....	33

A Look at the Drawing Window.....	33
Task Panes.....	34
Rulers and Grids	34
Manipulating Shapes.....	34
1D Shape Handles.....	35
2D Shape Handles.....	36
Vertex Handles	36
Eccentricity Handles.....	37
Get Around Using Your Keyboard.....	38
3 Working with Basic Diagrams.....	41
Making Diagrams	42
What Is a Template?.....	42
Working Without a Template.....	46
Clone Your Drawing.....	47
Find Online Templates and Samples.....	49
Save Your Diagram.....	49
Save As.....	49
AutoSave.....	51
Working with Drawing Windows.....	53
Task Panes.....	53
Switching Between Windows.....	55
Working with Full Screen Windows.....	57
4 Taking Control of Your Diagrams.....	61
Working with Pages.....	62
Adding Pages.....	62
Inserting Pages.....	63
Using Background Pages.....	64
Rename Pages.....	66
Reorganizing Pages.....	66
Customizing Pages.....	67
Scaling Your Page.....	71
Working with Themes.....	72
The Theme Gallery.....	73
Changing Themes on-the-Fly.....	76
Working with Color.....	77

5	Working with Shapes	81
	Find the Right Shape	82
	Selecting Available Shapes	82
	Frequently Used Shapes	83
	Changing Shapes	87
	Saving Favorites	89
	Understanding Stencils	90
	What Is a Master?	90
	Creating Personalized Stencils	91
	Edit Stencil Sets	93
	Searching for Shapes	96
6	Manage Shapes	101
	Using Groups to Organize Shapes	102
	When to Use Groups	102
	When It Is Better to Avoid Groups	107
	Editing Groups	107
	Arranging Shapes	108
	Using the Dynamic Grid	108
	Straighten Up Shapes with Auto Align	109
	Using Position to Arrange the Diagram	111
	Old-School Grid, Ruler, and Guides	115
	When Overlaps Occur	117
	Using Layout to Organize Shapes	118
Part II	Customizing	121
7	Connecting Shapes	123
	What Are Connectors?	124
	How to Connect Shapes	124
	Understanding Connectors	129
	Connecting Shapes Versus Points	129
	What Happens to Connections...	132
	...When I Drag a Shape?	132
	...When I Split a Connector?	132
	...When I Delete a Shape?	133
	Modifying Connectors	134
	Formatting	135
	Routing Styles	136

Using Line Jumps	136
Manual Override	138
Working with Connector Points	140
Adding or Removing Connection Points	140
8 Making Advanced Diagrams	143
Organizing Diagrams	144
Containers	144
Lists	148
Callouts	151
ScreenTips	155
Using Headers and Footers	157
Working with Text	159
Creating Text Boxes	160
Using Text Fields	160
Layers	163
Creating Layers	163
When to Add Layers	165
9 Shapes: Customizing	167
Duplicating Shapes	168
Making Several Copies	168
Resizing Shapes	170
Rotating Shapes	171
How to Format a Shape	172
Modifying Common Format Attributes	173
Modifying Less Common Attributes	174
Using Format with Groups	175
Changing Text	176
Editing and Formatting Text	176
Modifying Text Blocks	179
10 Shapes: More Than Meets the Eye	185
Understanding Special SmartShape Features	186
What Is Shape Data?	186
Right-Click Menus	186
Control Handles	187
Hyperlinks	188
Smart Tags	188

Import External Images.....	189
What You Can Do with Images.....	190
Resizing Images	192
Working with Clip Art	193
Using Excel Charts.....	194
Importing Scalable Vector Graphics.....	196
Importing AutoCAD Drawings	197
Adding Content to AutoCAD Drawings	200
11 Printing Visio Diagrams	203
Just the Basics	204
Print from the Backstage	204
The Print Preview Pane.....	208
Test Your Print Job.....	210
Controlling the Space Around the Print Job.....	211
Headers and Footers	211
Margins.....	213
Selecting What You Will Print	214
Printing Just a Portion of a Diagram.....	215
Selecting Specific Pages in Visio	216
Background Page Printing (or Not).....	217
Selecting Shapes to Print	219
Printing by Layer.....	219
Gridlines	221
Get High-Quality Print Jobs.....	221
Color Printing.....	223
Part III Advanced	225
12 Sharing Visio Diagrams	227
Share Drawings Using Email	228
Visio Viewer.....	229
SkyDrive.....	230
Social Networks	232
Creating a Web Page from Your Diagram.....	234
Saving to Other File Formats from Visio.....	235
Creating PDF and XPS Files.....	236
XML Formatted Drawings.....	237
Older Visio Formats	237

Getting Visio Drawings into Other Applications.....	238
Office Applications.....	238
Other Applications.....	240
Exporting Drawings to Image Formats.....	240
13 Unique Needs: Touchscreens, Custom Templates, and Complex Printing Concerns.....	245
Touchscreens.....	246
Switching Between Touch Mode and Mouse Mode.....	246
Working with Shapes.....	247
General Touch Controls.....	248
The Touch Keyboard.....	251
Creating Your Very Own Template.....	252
A Look at Complex and Multipage Print Jobs.....	256
Printing Tiled Drawings.....	256
Using Page Scale.....	258
Using Avoid Page Breaks.....	260
Printing Mixed Orientation Drawings.....	260
Combine Drawings into a Single Sheet.....	262
14 Using Data.....	265
What Can I Do with Shape Data?.....	266
Exploring.....	266
Types and Uses.....	268
Creating Shape Data Fields.....	269
Add a Simple Data Field.....	270
Adding Lists and Format.....	274
Saving a Set of Shape Data Fields.....	276
Displaying Text in Shape Data Fields.....	278
Creating Reports.....	279
Using the Report Definition Wizard.....	279
Generating Reports.....	283
Adding Totals and Subtotals.....	285
15 Working with External Data and Data Graphics.....	287
Linking Shapes to External Data.....	288
Look at Your External Data First.....	288
Using Link Data to Shapes.....	289
What Are Data Graphics?.....	296
How to Create a Data Graphic.....	296
Customizing Data Graphics.....	299

16 Additional Visio Resources	303
Visio Viewer	304
Resources and Tools	304
Visio Help	305
The Official Visio Blog	306
Office.com.....	307
Additional Reading.....	310
Websites Worth Checking Out.....	311
17 Collaborating with Visio	315
SharePoint	316
Saving and Editing in SharePoint.....	317
Co-Authoring	320
Markup and Review in Visio	323
Adding Comments.....	323
Using Ink.....	326
Using Track Markup	329
Don't Share Too Much.....	331
What Is Removed	334
What Is Not Removed	335
18 Tips for Flowcharts, Process, and Block Diagrams	337
Process and Flow Chart Diagrams.....	338
Auto Resize and Flowchart Shapes	338
Decision Shapes	339
Using Subprocesses.....	340
Swimlanes and Phases in Cross-Functional Flowcharts.....	342
Validating Your Diagram	345
Business Process Diagrams (BPMN 2.0) and SharePoint Workflows	346
BPMN Diagrams.....	346
SharePoint Workflows	347
Block Diagram Tips	348
Blend Block Shapes.....	348
3D Perspective Block Diagrams.....	349

19 Tips for Working with Other Diagram Types	353
Working with Network Diagrams	354
Logical Diagrams	354
Rack Diagrams	355
Timeline Tips	357
Org Chart Tips	359
Create Org Charts Manually	361
Using the Organization Chart Wizard	363
Office and Space Plans	365
Creating Plans Using Shapes	366
Space Shapes	367
Working with Dimension Lines	368
Index	371

About the Authors

Alan Wright has worked professionally in and around IT for nearly 10 years. He has provided enterprise-level support in the Detroit, Michigan, area and continues to provide software and hardware support for small business and residential users. He holds several certifications from CompTIA and Microsoft and enjoys working with technology and teaching others how they can make technology work for them.

Alan has been the technical editor on other books from Que Publishing, including *Using Windows 8* and *Microsoft Project 2013 In Depth*. When not working with computers, he enjoys working on projects in his cabinet shop. Alan lives in northern Michigan with his wife, Pam, and their two children, Joshua and Jonathan.

Chris Roth has always enjoyed creating pictures of any kind and absolutely enjoys the combination of computer technology with graphics. He has been working with Visio since The Beginning in 1992, when he was part of the Visio 1.0 team at then-extant Visio Corporation. Since then, he's continuously been busy helping customers incorporate diagrams, drawings, and visualizations into their daily business and to develop custom graphical solutions based on Visio.

A Microsoft Visio MVP since 2002, he has presented sessions at several Visio conferences and has written more than 250 articles about Visio for his "Visio Guy" website (www.visguy.com), which he launched in 2006.

Originally from Seattle, he currently lives with his wife and baby daughter in Munich, Germany. Away from family, laptop, and relaxing Bavarian beer gardens, he plays trombone with the TT Orchestra and the wind ensemble Pullacher Blasmusik.

Dedication

To my loving and very patient wife, Pam; you will never know how glad I am to have you by my side.

—Alan Wright

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—Alan Wright

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INTRODUCTION

INTRODUCTION



Nervous, excited, frustrated, giddy, exhausted—maybe one of those words captures how you feel right now as you look at this *Absolute Beginner's Guide*. Learning how to use a new piece of software or getting up to speed on a new version is not always fun. On the other hand, you likely enjoy learning new things when you see new possibilities and feel the benefits. Visio may be a mystery to you now, and you may feel some trepidation, but rest assured this book was designed to quickly get you comfortable with this amazing program.

Visio is all about visualizing ideas and information. You can create amazing diagrams to show how processes work and how things interact. You can create floor plans and layouts with relative ease. Visio is used more often than you probably realize, from web content and org charts to advertising and business presentations. It has been said that a picture is worth a thousand words, and Visio allows you to speak volumes, which is why it has become an integral tool for businesses that put a premium on communication.

Visio has been around since 1992 and has gone through some big transformations to keep pace with the demands of technology. If you have used it in the past, you'll find some new features worth getting excited about. If you have never used it, prepare to be amazed. You will love how easy it is to create diagrams using templates and to preview changes using themes. Using Shape Data, you will find new ways to display information that are limited only by your imagination.

Despite the complexity and overwhelming potential that Visio presents, it is all built on basic concepts and tools that you will quickly grasp. If you have an artistic side, you will enjoy how satisfying Visio makes it to visualize and present information and data.

The *Visio 2013 Absolute Beginner's Guide* will assist you as you explore this application and consider ways to change and improve your ability to communicate ideas and concepts to others. We'll encourage you to poke around, try different things, and we will alert you to some best practices and tips. Above all, enjoy learning about Visio.

What This Book Covers

Visio is a communication tool used everywhere by people of all backgrounds and all types of organizations. Because of this, we have tried to keep to the basics and provide essential tips and suggestions to help you save time and give you the knowledge needed to make you a power user, no matter how you use Visio.

Although you may feel like an absolute beginner, we will quickly have you creating diagrams and working with Visio's tools, and you will feel your confidence grow. You can follow along using different templates, and where more advanced concepts are considered, you will see the steps you can follow. At times we may only point out that there are more complex options or that more can be learned than we have space to develop.

Because Visio 2013 comes in three versions, we principally consider information that is practical to any user of Visio. We will try to point out anything that may be unique to specific versions along the way. A few chapters have content aimed at users with Professional or Pro for Office 365 versions, and we warn you when this is the case.

With this book you will be able to do the following:

- Create your own flowcharts, org charts, and network diagrams using a variety of shapes and connectors.
- Create and manage customized shapes and arrange your own stencils.

- Organize and arrange your diagrams using a variety of tools, such as containers, callouts, and layers.
- Utilize SmartShape features and shape data to create more powerful communication tools.
- Print your diagrams efficiently using an array of settings and tools to control what prints and how it will appear.
- Export Visio content for use in other applications in different formats.
- Share your Visio drawings with others through a variety of tools, including email, SkyDrive, and SharePoint.

How This Book Is Organized

This book is arranged in three parts, which are broken down into chapters:

Part I, “Visio 2013 Basics,” helps you get familiar with the tabbed interface used in Visio 2013. You will become familiar with the components of a basic diagram, including Page Backgrounds and Themes. You will create drawings using Templates and understand the ins and outs of Shapes and Stencils.

Part II, “Customizing,” will deepen your awareness of additional features to be found in Shapes and Connectors. You will get to know tools that help you work better with content in your drawings using Containers, Layers, and Text. Editing, Duplicating and Formatting options are considered and you will dive into SmartShapes and Shape Data. You will learn all about Printing in this section.

Part III, “Advanced,” introduces you to the many ways you can share and export your diagrams into other formats. You will see how to use special Touchscreen menus and learn about other unique situations here. How to collaborate with other Visio users and where to find more Visio content and information will be considered. You will learn about more complex ways to use and work with Data, including data that is maintained outside of Visio. Finally, you will look at unique features and get some tips for working with specific templates and diagram types.

Conventions Used in This Book

Most terms specific to Visio will be explained as we go along in the book. However, there are a few terms and standards that we had in mind while preparing this book that we should explain at the outset.

Working with Visio Tools and Menus

When the book describes labels or titles that you can see on the screen while working with Visio, they will be capitalized. Instructions to press a specific key or keyboard combination will also be capitalized, like this:

1. Select the Design tab.
2. In the Page Setup section, click the Page Setup button or press Shift+F5.
3. Review settings on the Page Size tab and click OK.

Because of touchscreen interfaces, we generally use the term “select” rather than “click” to describe the process of activating a button or menu item, so feel free to click, tap, or press the indicated item to carry out the action. When there is a need to activate a button to continue to another step, “click” tends to sound better and has been used for that reason.

Using Screen Illustrations

The screen illustrations used throughout the book as figures are a valuable reference tool. Generally, illustrations will show you the step being discussed in the text. Some illustrations are cropped to focus attention on details, whereas others show the whole Visio window to help you get familiar with how things are laid out. Look around and notice tabs and features that are not being discussed, just to get a feel for where things are located. Occasionally, we may include callouts or combine multiple elements in a single illustration so that you can compare menus or layouts.

Web Addresses

You may see web addresses referred to in the book. These are offered as points of reference in examples, or they may point to additional information or resources. They will appear in this format:

<http://www.microsoft.com>

Throughout this book you will see the words “drawing” and “diagram” used almost as synonyms. Both are words used in the Visio interface, and they tend to be interchangeable. Technically, a *diagram* refers to a more conceptual drawing, whereas a *drawing* conveys the idea of a more finished product with measurements and details. In practice, some types of templates tend to be considered as diagrams, whereas others are more often referred to as drawings. Don't think you need to read into the way these terms are used in this book.

Special Elements to Watch For

As with all books in this series, *Visio 2013 Absolute Beginner's Guide* includes special items that provide additional information that will add to your understanding:



TIP Tips indicate a useful time-saving step, shortcut, or a way for you to easily get better results.



NOTE Notes provide additional background information or related material about the task or topic being considered. It's not information you absolutely *need* to know, but it may provide you with a clearer understanding of the topic.



CAUTION Cautions alert you to potential undesirable results and point out items or choices that could cause problems if misunderstood or accidentally used.

Although you could read this book from beginning to end, you will likely find it practical to jump around, and we have included references to subjects that are considered more in depth in other places in the book. Feel free to go back and forth as you get familiar with specific tasks and topics.

IN THIS CHAPTER

- How will templates save me time?
- What make templates different?
- How can Visio save my diagram?
- How will using multiple windows help me develop mad multitasking skills?

3



WORKING WITH BASIC DIAGRAMS

Visio is all about making great visuals, and you will spend a lot of time focused on the drawings themselves. This chapter provides a good point to step back and see all the other features of Visio that will help you later as you work on those drawings. Consider how choosing the right canvas and frame can make a great work of art look awesome.

Templates, file formats, pages, backgrounds, and your work area are all fundamental to having the right canvas and frame for the drawings you create. We look at templates and the drawing window in detail in this chapter. Chapter 4, “Taking Control of Your Diagrams,” considers how pages and backgrounds further accentuate your work.

Making Diagrams

I enjoy building cabinets from scratch. Despite how satisfying the final product can be, finding the right wood and materials can be time consuming, and the project can also take much longer than expected (sorry, dear). For that reason I have on occasion been quite happy with purchasing a cabinet from IKEA and spending a fraction of the time assembling a very nice-looking cabinet.

Templates serve a similar purpose. No one questions your imagination and artistic abilities, and you certainly can create drawings from scratch in Visio if that is your preference. You will quickly appreciate the many advantages of using templates when you see how they save you time.

What Is a Template?

We've thrown this term around quite bit, but what is a template? Templates refer to the overall framework that determines appearance, purpose, and even the tools that are used to make your diagram. They include the sets of shapes and stencils present in the Shape panel; the size and scale of the page you work on; the paper size for printing; settings related to font, color, and many others that dictate the default behavior of shapes and connectors in your diagram. You might even see additional Ribbon tools unique to that template, as in the case of an Organization Chart template.

Find the Right Template

We used a Basic Flowchart template in Chapter 1, "Getting to Know Visio 2013," and you no doubt were tempted to check out some of the other templates in the Template Gallery (see Figure 3.1). Visio 2013 Standard includes many predefined templates, and Professional has even more. The included templates have a very modern look with shapes and content that have been selected to reflect the times we live in.

When you choose to start a new Visio diagram, you are presented with featured templates by default. You can refine the choices by using categories, which presents eight groups of templates as shown in Figure 3.2 (Business, Engineering, Flowchart, General, Maps and Floor Plans, Network, Schedule, and Software and Database).

In addition you can search for online templates. We'll come back to this feature later in this chapter.



FIGURE 3.1

Right away, you may recognize a few interesting-looking choices in the Template Gallery.

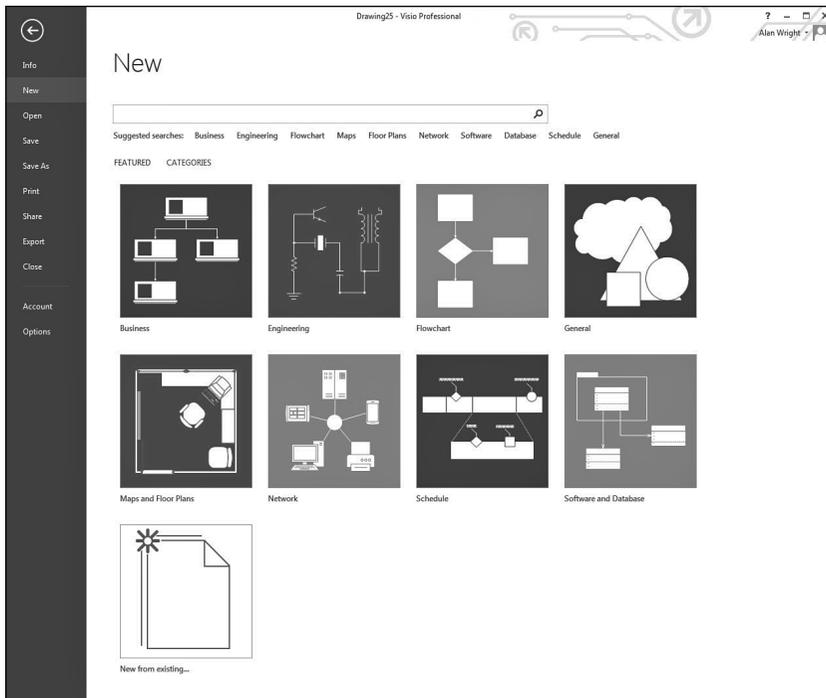


FIGURE 3.2

There are eight categories of templates.

Take a look at the purpose of these categories and what sets them apart from each other.

- Business templates include Organization Charts, Marketing, and Charts and Graphs. You find tools for analyzing processes such as Cause and Effect or Fault Tree. Many people have learned to use mind mapping or brainstorming diagrams.
- Engineering offers several templates, including Basic Electrical and Part and Assembly Drawing (see Figure 3.3).

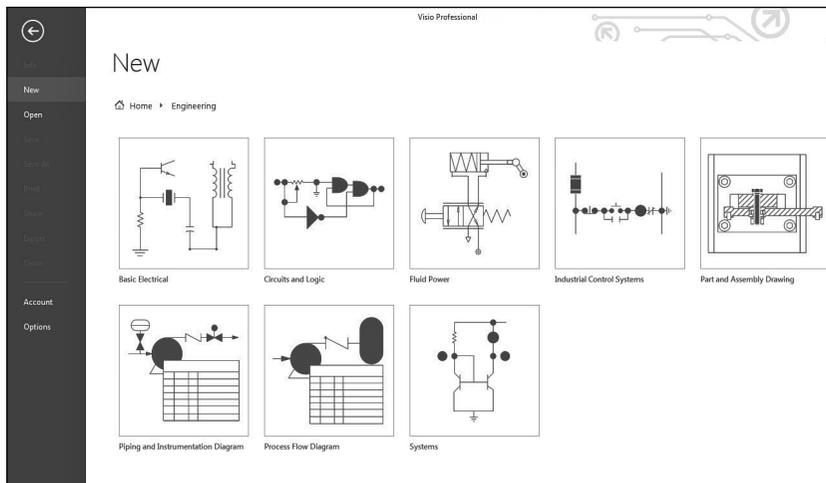


FIGURE 3.3

Looking at a category of templates provides an array of choices, as these engineering templates illustrate.

- Flowchart templates include the Basic Flowchart, BPMN Diagram, and Workflow Diagrams.
- General includes Basic Diagram and Block Diagrams. This is a good area to start with if the diagram only needs very basic shapes and stencils.
- Maps and Floor Plans include many types of templates. You can create 2D or 3D map graphics for advertising, floor plans and layouts, detailed HVAC, ceiling grids, and site plans.
- Network templates include ways to represent the physical network, rack diagrams, and more conceptual diagrams to visualize Active Directory or LDAP Directories.

- Schedule templates provide tools for calendars, Gantt charts, and timelines.
- Software and Database has many templates, such as Data Flow, Database Notation, Program Structure, and Web Site Map.

When you select a specific template, a small window appears (see Figure 3.4) with a few details related to the purpose of the template and its origin. You can choose to use Metric or U.S. units of measurement and then select Create. You can also scroll to the left or right, clicking arrows to browse other templates.

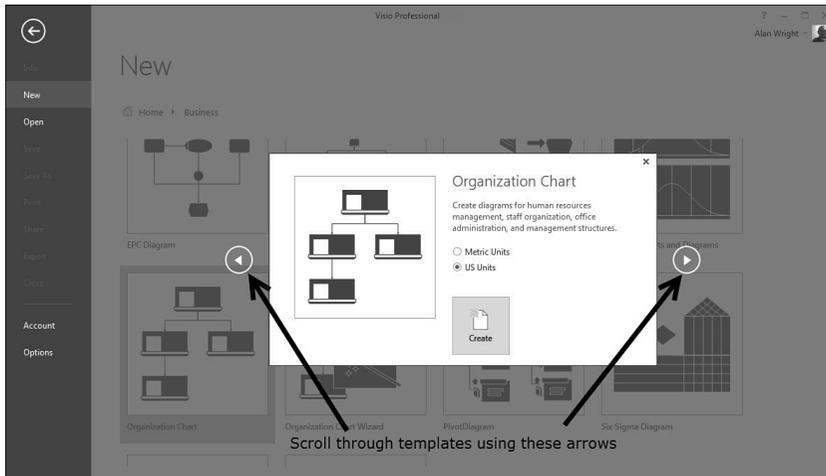


FIGURE 3.4

Selecting a template provides you with an explanation of how you would use this template.

HOW TO VIEW TEMPLATES

Think of a template as an advanced starting point for your diagram. At times it is enough to have a flowchart template and a blank page. However, if you find that you often are creating similar content or variations on the same diagram, you might consider setting up and saving your own template.

In a personalized template you can determine the shapes and stencils available. You can also include personalized elements, such as company logos. To further customize the starting point of your diagrams, you can even include a page with prepopulated content.

→ To learn how to create your own templates in Visio, see page **252**.

Working Without a Template

You can start with a blank drawing if you decide not to use the templates for the sake of a quick diagram. You simply choose Blank Drawing from the selection of templates featured when you first open Visio.

If you have been working in Visio and want to create a new drawing, follow these steps:

1. Select the File tab to open the Backstage area.
2. Select New from the vertical menu to the left. You see the list of featured templates to the right.
3. Select Blank Drawing and Create on the pop-up window that appears. Blank drawings open with no shapes, stencils, or any other configuration settings (see Figure 3.5). You can still work right away, selecting shapes and such from the Home tab and the Tools menu.

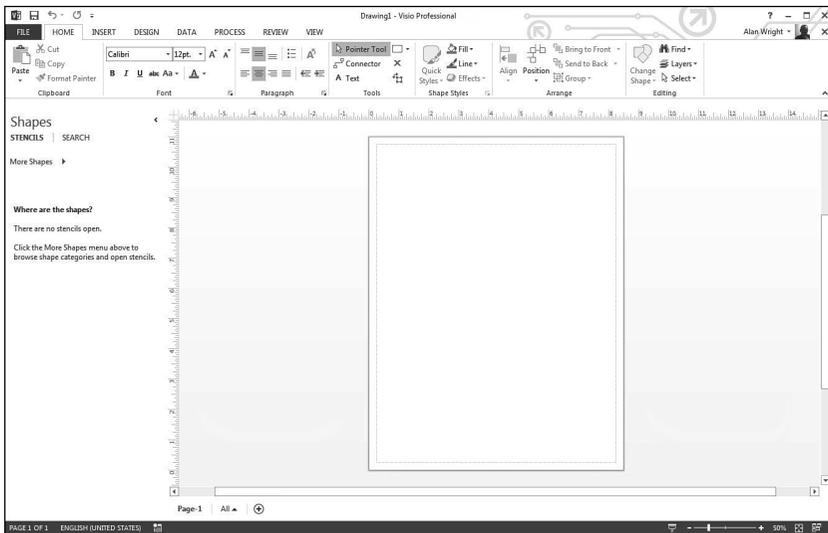


FIGURE 3.5

Starting a drawing from scratch using a blank drawing.

Clone Your Drawing

When you have invested blood, sweat, and tears into a diagram, you might not want someone else to tamper with it. Imagine that you need to make an updated version of an organization chart after a promotion has occurred in your company. Maybe you want to present a couple of similar variations of a diagram in a proposal with your customer. Rather than grabbing the original and modifying it, it might be wiser to clone the original and modify the copy. That way, you always have an intact original to refer back to.

Use a Recent Drawing

If you need to tweak a diagram or present variations of the same diagram, a nice feature is the capability to easily create a copy of an existing drawing from the Recent Drawings list in Visio.

1. Open Visio and look for the list labeled Recent off to the left.
2. Right-click a file and select Open a copy as shown in Figure 3.6. (The link at the bottom of Recent files labeled Open Other Drawings will take you to the Recent Drawing list discussed in the next set of steps.)
3. Notice a copy has opened with a name like Drawing1. Any alterations to this drawing will have no effect on the original; they are completely separate.
4. To save this copy, Select File and Save As to assign a unique name and location.

If the drawing is not listed in the Recent Drawing list, open it first so you have the option to right-click as described.

There is another way to get to this list of recent drawings:

1. Select the File tab and then select Open.
2. As shown in Figure 3.7, helpful thumbnails display when you view the list in this way.
3. Right-click a drawing and select Open a copy.

If you anticipate using a drawing as a base for future copies or just want to keep it handy, you can also pin the drawing to the Recent Drawing list. As you hover your mouse over the document in the Recent list, you see a pushpin to the right. As shown in Figure 3.6, when you click the pin you see the document pinned to the top of this list until you unpin it.

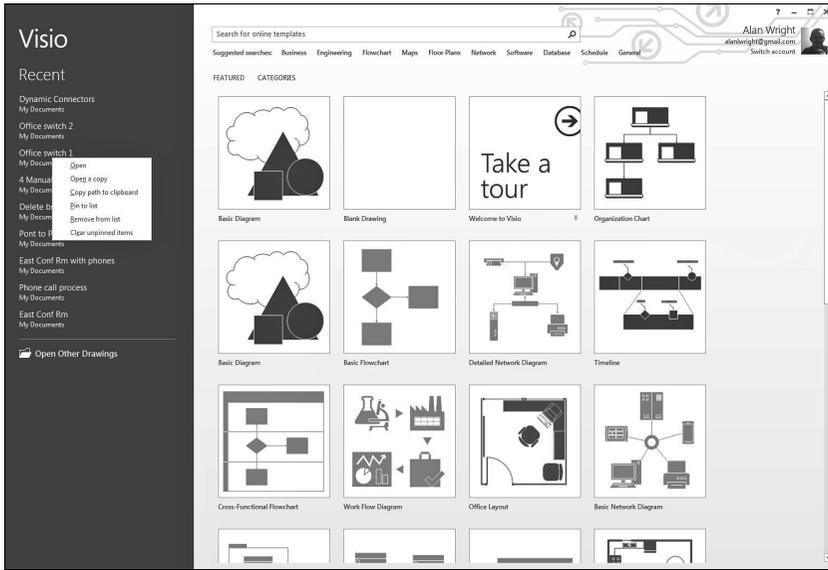


FIGURE 3.6

Use *Open a Copy* to protect your original diagram from accidents.

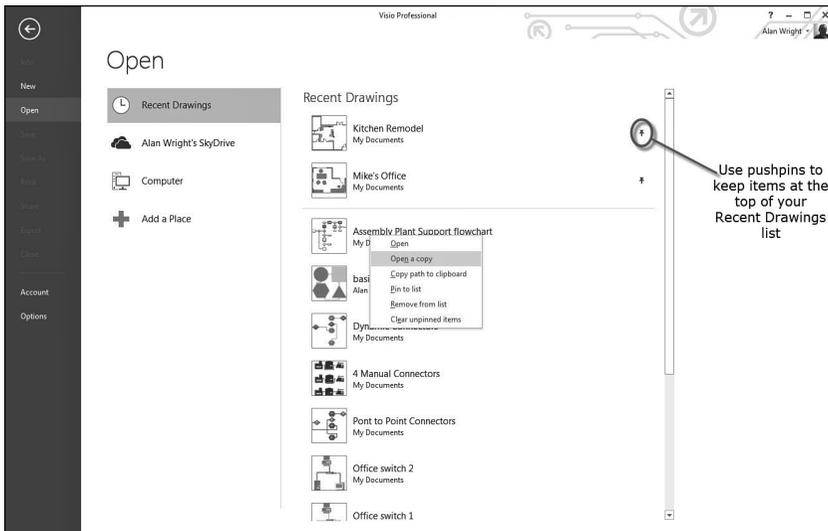


FIGURE 3.7

The *Recent Drawings* list can also display thumbnails of your diagrams.

Find Online Templates and Samples

As mentioned earlier, when you look at the Template Gallery you see at the top of the page a field that allows you to search for templates from office.com. In addition, you can search other websites and then download templates and samples to use as a starting point for your own diagrams. Try to download from trusted sources to avoid unexpected surprises.

→ To find recommendations for online templates and samples, see page 311.

Save Your Diagram

Save your work. It's easy to say, but it's not something we always remember to do. The mere thought might bring back memories of frustration and the Luke Skywalkerian cry of "Nooo!" that escaped your lips when an application froze or power was lost once long ago. Visio provides a few ways to save you from those feelings of remorse.

Save As

Save As is an important place to start soon after you create a new drawing. When you select the Save icon in the Quick Access toolbar for the first time, it automatically takes you to the Save As screen (see Figure 3.8). You can also click the File tab and choose Save As on the left, or you can use Ctrl+S on the keyboard.

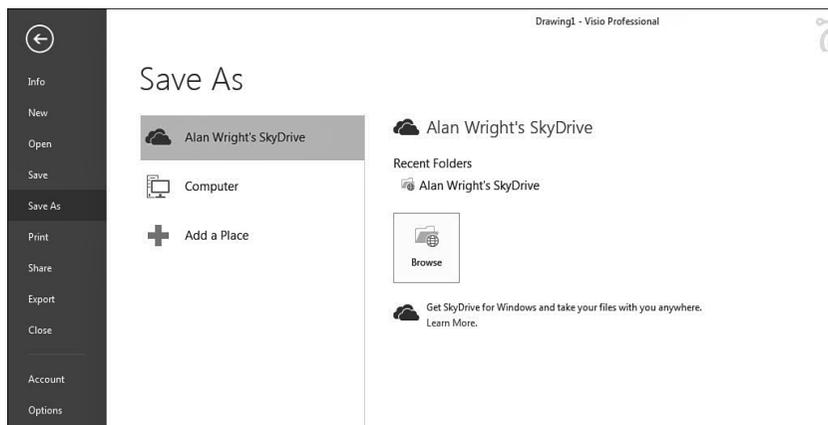


FIGURE 3.8

You have a few places to choose from when saving your work.

A new feature in Visio 2013 is the inclusion of SkyDrive as a location to save your work. This cloud-based location is associated with your Live ID. When saved to this SkyDrive, you can access the content from any computer with Internet access, and you can even share files from your SkyDrive.

→ To learn more about sharing your drawings using SkyDrive, see page **230**.

THE NEW VISIO FORMAT .VSDX

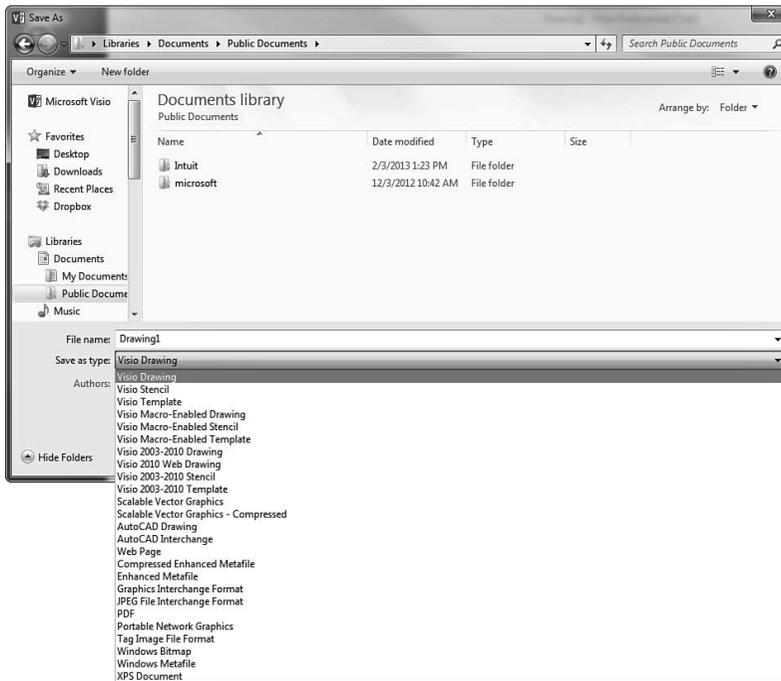
Visio 2003, 2007, and 2010 all used a common .vsd format. So why change things now? Don't worry; this is not a ploy to force people to upgrade. Every new release of Visio has used a proprietary .vsd format that has evolved from version to version. So it should not surprise us that Visio 2013 has a new format. So what are the advantages of this new format?.

The new .vsdx format uses XML content and essentially saves your file in a zipped compression that results in much smaller file sizes. This is also consistent with other Office applications that now use XML for their default formats, thus Word has .docx and Excel uses .xlsx. This is great when sharing files, and it also conserves storage space. Another perk is that XML is considered safer and more resistant to data corruption and viruses.

With this new file format, new features can be used when working in a SharePoint environment, such as coauthoring a diagram. For developers, .vsdx provides new ways to work with Visio drawings, for example, programs can be designed to read and extract data from drawings, and content in drawings can be updated to reflect a new logo without opening the files.

When you use Save As, you can choose the file format that you want to use. As you can see in Figure 3.9, there are many formats to choose from. The default is named Visio Drawing; it is a new format and uses the .vsdx file extension. The Visio 2003–2010 Drawing format choice may be practical when sharing drawings with others who use older versions of Visio.

→ To learn more about other formats, see page **235**.

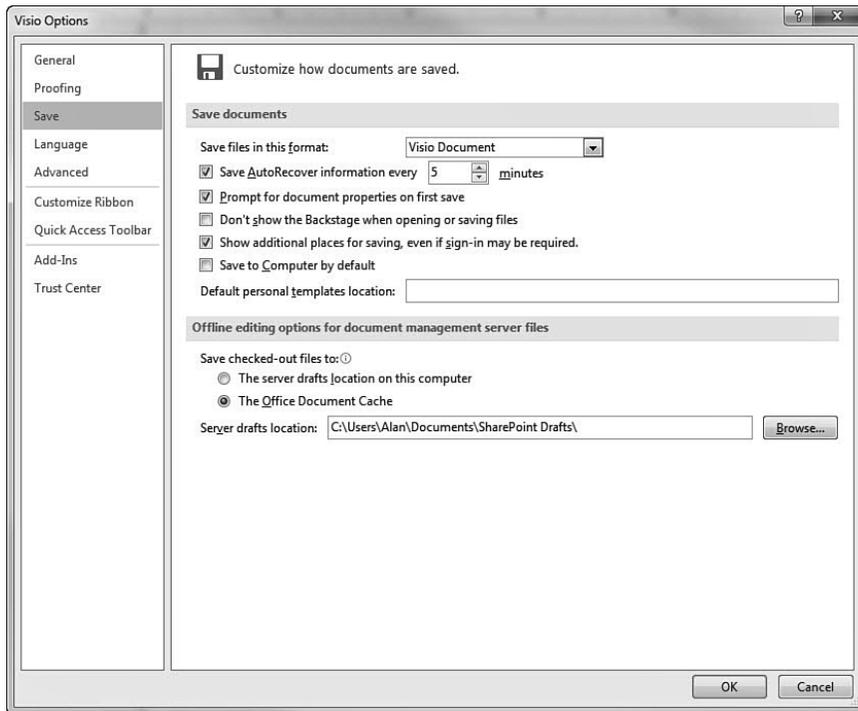
**FIGURE 3.9**

From Visio, you have many choices when choosing how to save your diagrams.

AutoSave

AutoSave does what the name implies; it automatically saves your work—if it is configured, that is. Whereas your concern about saving a test diagram may not be the same as saving an organization chart you have worked on for the past three days, it is a good idea to know AutoSave is enabled and which settings are being used (see Figure 3.10).

1. Click the Home tab to access the Backstage area.
2. Click Options at the bottom of the vertical menu on the left.
3. Select Save under Visio Options and verify your settings.
4. Click OK to save changes.

**FIGURE 3.10**

You have several options when using AutoSave.

In Figure 3.10, you see the setting options for Save. Here you can change the default format using the Save Files in This Format drop-down menu. Save AutoRecover Information Every X Minutes allows you to enable and change the default of 10 minutes to a shorter period of time. It is not enabled by default. To minimize the amount of work that can be lost due to a power outage or because a computer suddenly stopped working, some people change this to 5 minutes or even less. If the file itself is extremely large or complex you might notice a slight hit on performance. If that happens then increase the interval. You may prefer to enable or disable other settings here if you desire to further fine-tune your save experience.



TIP If you find that the AutoSave settings do not work consistently, they may have been applied only to whichever drawing was open at the time you made adjustments. Close all drawings and follow the previous steps to open the Save options. Confirm the settings you want enabled and then click OK. Now when you open new or old drawings they should have these Save settings.

Working with Drawing Windows

As you become more proficient with Visio, you might want more than one drawing open at a time. Visio allows you to easily navigate among open drawings. The way Visio handles multiple open drawings deserves a quick overview.

The Visio application is itself a window and can be moved, resized, and minimized, like any Microsoft application. This application window includes the tabbed ribbon interface. The main Visio application window can contain any open Visio files, the same as modern web browsers allow for multiple tabbed web pages in one window. You might notice what appear to be several stacked windows on the Windows task bar; they are likely all contained in one Visio application window. For this reason the ribbon and tabs across the top do not appear to alter when changing from one diagram or drawing window to another.



NOTE You may occasionally have a diagram that has a unique tab that is needed only by that diagram, as in the case of an office layout that uses a Plan tab. If you switch between a flow-chart diagram and an office layout diagram, the Plan tab appears or disappears, depending on the drawing window that is active.

Drawing windows refer to the work area below the ribbon interface where you create your diagrams and drawings. Drawing windows can be minimized, maximized, and arranged below the tabbed ribbon bar.



CAUTION If you decide to close a drawing window, make sure you choose the correct X to do this. When your drawing window is maximized, you see the standard application window controls in the upper-right corner of the Visio window for Help, Minimize, Maximize, and Close. Below that you see a second X, which is the one to use to close the drawing window.

Task Panes

Besides the Drawing window, you have likely noticed task panes by now. These may reveal more detailed information or provide additional options to work with your diagram. There are four common task panes in Visio:

- Shapes
- Shape Data
- Pan and Zoom
- Size and Position

In the Show section of the View tab you can enable or disable task panes by clicking the Task Panes drop-down button and selecting to toggle it on or off. In Figure 3.11 you can see four task panes listed. Shapes and Pan & Zoom are toggled on and can be seen below in the drawing window.

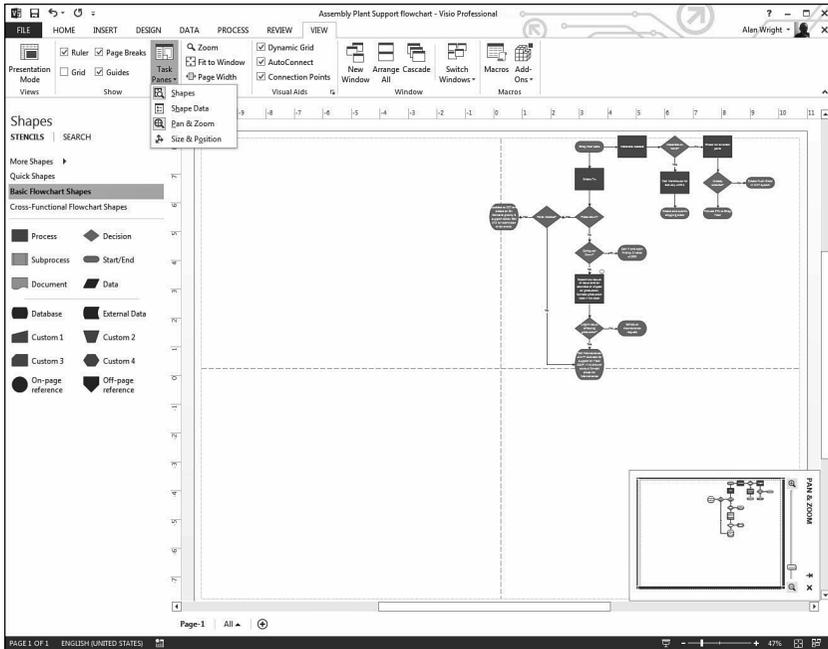


FIGURE 3.11

Task panes can be turned on or off from the View tab.

The Shapes task pane we used previously and by default is turned on anytime we open a new drawing window. It is docked on the left side of the window by default.



TIP You can undock the Shape pane and let it float elsewhere. Hover your pointer over the word *Shapes* in the header area of the pane. When you see the cursor change, click and drag the pane to a different location. Alternatively, you can minimize its size by clicking the small arrow to the left of the word *Shapes*, as shown in Figure 3.12. The pane shrinks to the left and reveals a single column of shapes. Click the arrow again to expand.

You may see other task panes occasionally, and some are unique to certain templates. They all can be moved, docked to the edge of a drawing window,

resized, and anchored to the edges of a drawing window. Anchoring the pane allows you to automatically hide (Auto Hide) them so they fly open only when you hover over them.

Switching Between Windows

If you open the View tab, you notice a section labeled Window. This refers to the drawing windows you may have open. You see four buttons here:

- New Window
- Arrange All
- Cascade
- Switch Windows

To quickly jump between windows, you may be able to use Ctrl+Tab on the keyboard. Another option is to click Arrange All to split the available screen space among the open drawings. This provides a way to see a portion of all open drawings, as shown in Figure 3.12. You might use this to compare drawings side by side.

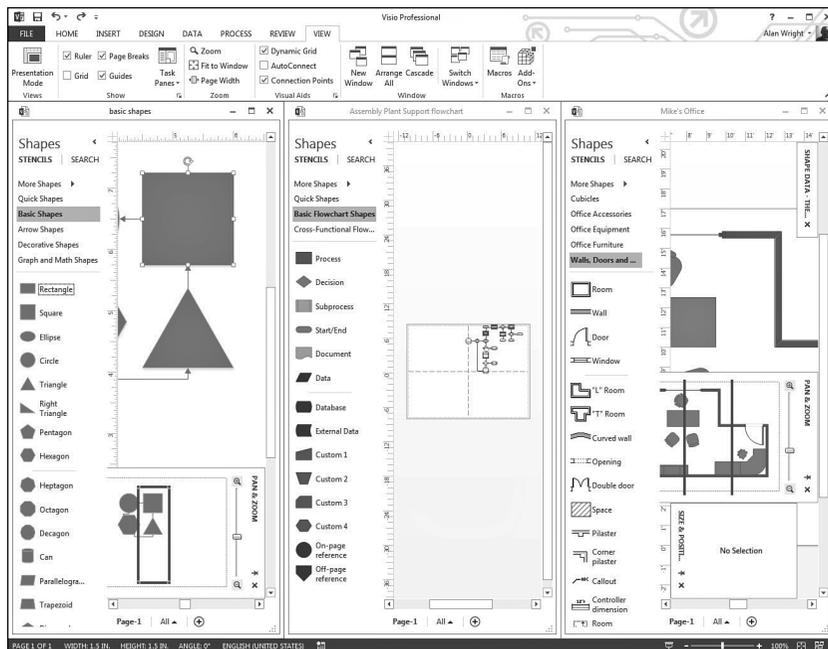


FIGURE 3.12

You can see all open drawing windows at once using Arrange All.

You can also select the Cascade button to see the open windows arrayed by their Title bar (see Figure 3.13). This can be useful when you have many open drawings and you need to quickly find a specific one. When you select the drawing you want, you can maximize the drawing window by double clicking the Title bar or by using the traditional Windows maximize button located in the upper-right corner of the window. This also removes the cascade effect.

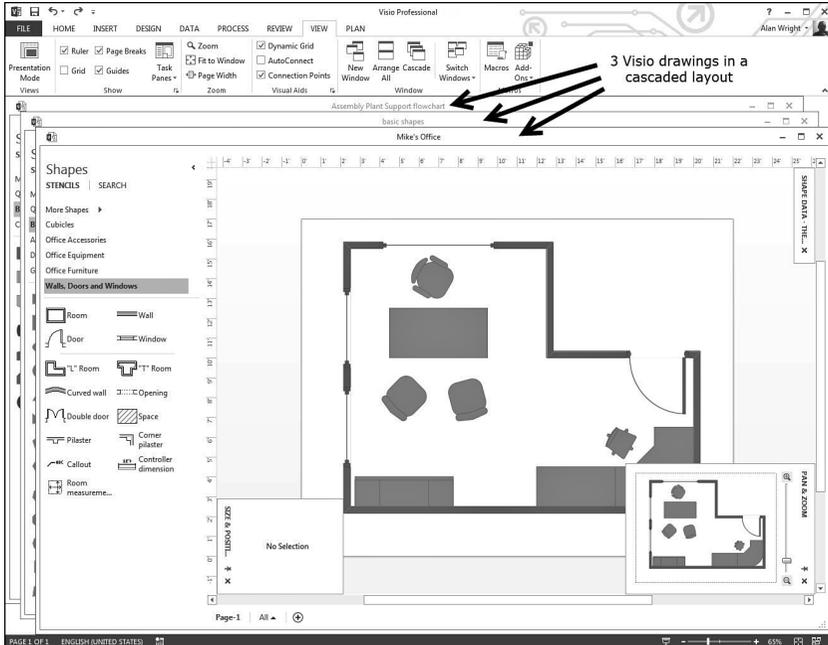
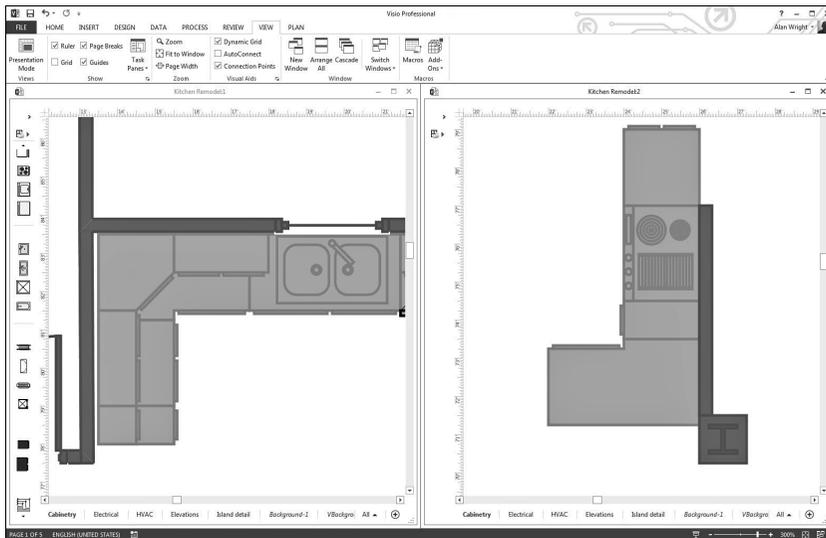


FIGURE 3.13

You can use Cascade view to get a handle on what is open.

Use the New Window button to open a second view of the current drawing. You are not making a copy; you have an additional drawing window to the same drawing. Changes made in the first window are seen in the second, and vice versa. This can be useful when working with a large diagram; one window can focus on one area, and the second can position over another area. Now you can jump between drawing windows rather than move back and forth on the diagram. Notice how this is used in Figure 3.14; both Kitchen Remodel:1 and Kitchen Remodel:2 are different views of the same drawing arranged side by side.

**FIGURE 3.14**

The New Window feature enables you to see the same drawing from different perspectives.

Working with Full Screen Windows

Full screen or Presentation mode enables you to look at your Visio drawings like a PowerPoint slideshow (see Figure 3.15). To enter Presentation mode, click the projector screen on the bottom status bar just to the left of the zoom slider, or press F5. To escape, hit F5 again, Esc, or right-click and Close.

You are not able to modify the drawing while in full screen, but you can evaluate how the finished product will look. You can navigate through multiple pages by right-clicking and using the Go To menu or by using your arrow keys.

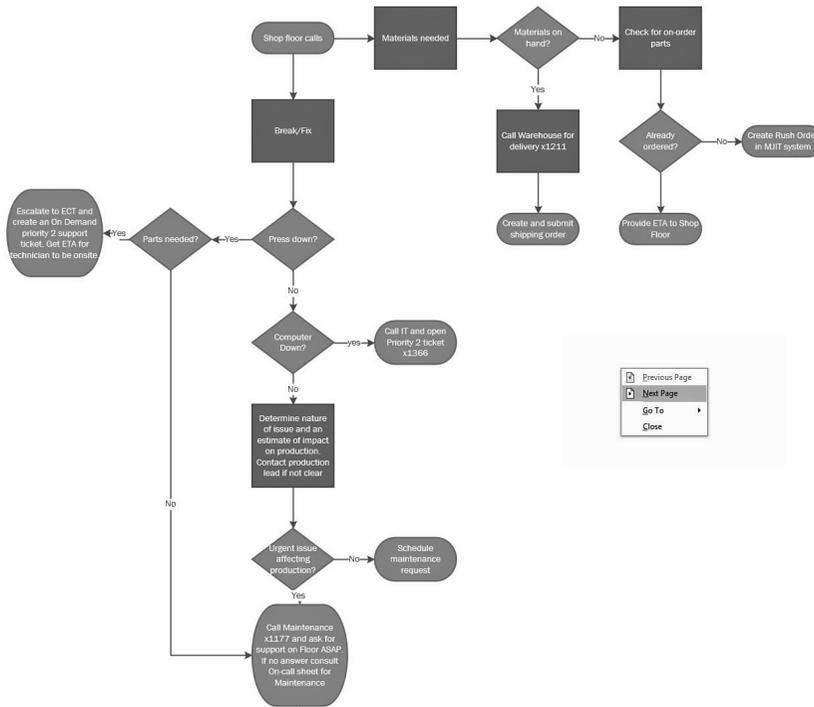


FIGURE 3.15

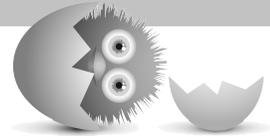
Full screen provides an unobstructed view of your drawing page.

THE ABSOLUTE MINIMUM

You have seen the value of templates when you start a diagram. It is a good idea to poke around a bit the first time you use a template. Make sure you are comfortable with the way elements in this template connect to one another. Read the description for the template to see if it really fits the style of diagram you need to create.

Protect your work by using copies of diagrams when appropriate and save your work often. If you haven't used the AutoSave feature, take the time to enable and configure it to minimize lost work.

It is important to understand how and when to use the Arrange All and New Window features to help you be as efficient as possible. Visio is designed to help you easily navigate between drawings and avoid frustration. Experiment with some of these display features now and you will feel more confident as you quickly create impressive diagrams that amaze your co-workers.



Index

Numerics

- 1D shapes
 - handles, 35
 - resizing, 170
- 2D shapes, handles, 36

A

- action tags. See smart tags
- adding
 - callouts to shapes, 151-154
 - commands to ribbon, 25-27
 - comments, 323-327
 - connection points, 140-142
 - content to CAD drawings, 200
 - Data Graphics, 296-298
 - fields to headers and footers, 211
 - groups to stencils, 106
 - layers, 165
 - pages to drawings, 62
 - photos to org charts, 359-361
 - shape data fields, 270-274
 - shapes to Favorites stencil, 89
- adjusting
 - print margins, 213
 - resolution of images, 192
- Adjust tool group (Picture Tools), 190
- aligning
 - shapes on Dynamic Grid, 109
 - text, 179
- Align tool, 110-111
- anchoring task panes, 55
- angles, nonorthogonal, 139
- applications, Office, compatibility with, 238-240
- applying themes to pages, 76
- arcs, eccentricity handles, 37
- Arrange All command, viewing open drawing windows, 55
- arranging
 - diagrams with Position tool, 111-112
 - shapes with Dynamic Grid tool, 108-109
- aspect ratio, overriding, 170
- attributes
 - common format attributes, modifying, 173
 - less common format attributes, modifying, 174-175
- Auto Align & Space tool, 110-112
- Auto Resize feature, 338
- Auto Size tool, 69-71
- Auto Space tool, 112
- AutoCAD (Automated Computer-Aided Drafting)
 - drawings
 - adding content to, 200
 - importing, 197-199
- AutoConnector feature, 124-127
- Automatically Link tool, linking external data to shapes, 293-294
- AutoSave, 51-52
- available stencils, browsing, 87
- Avoid Page Breaks tools, 260

B

- background pages
 - creating, 64
 - printing, 217-219
 - title
 - modifying, 66
- background printing, 208
- Backstage, 22, 31-33
 - printing from, 204
 - background printing, 208
 - collation, 206
 - paper orientation, changing, 206-208
 - Print Settings pane, 204-205

Ballpoint Pen tool (Ink), 327

behavior of connectors

- during drag operations, 132
- when shapes are deleted, 133-134
- when splitting connectors, 132-133

blank pages, adding to drawings, 62

blending shapes, 348

block diagrams, blending shapes, 348

Block Diagram with Perspective template, 349-350

blogs

- blogs.msdn.com/b/chhopkin, 313
- the official Visio blog, 307

BPNM (Business Process Model and Notation) flowcharts, 346

browsing available stencils, 87

building plans, dimension lines, 368-369

Business templates, 44

buttons, 23

- Position button
 - Distribute tools, 113
 - Orient Shapes tools, 114-115
- Presentation Mode button, 33

bvisual.net, 312

C

CAD drawings

- adding content to, 200
- importing, 197-199

calculations, performing on shape data field values, 298

callouts, adding to shapes, 151-154

Cascade button, viewing open drawing windows, 56

categories

- of templates, 42-45
- of themes, 72

Change Shape tool, 87-89

changing

- background of text blocks, 181-183
- orientation of pages, 67
- paper orientation for printing, 206-208
- scale of drawings, 71
- shapes with Change Shape tool, 87-89
- themes, color, 74
- z-order of shapes, 118

charts

- organization charts, 359
 - creating, 363-365
 - creating manually, 361
- photos, adding, 359-361

clip art, 193

cloning drawings, 47

Close Ink Shape tool (Ink), 327

closing

- drawing windows, 53
- ink shapes, 328

co-authoring tools

- SharePoint, 316, 320-322
- Visio drawings, checking out, 318-319

collaboration

- comments
 - adding, 323-324
 - hiding, 324-326
- SharePoint, 316
 - co-authoring, 320-322
 - versioning, 320
- Visio drawings, checking out, 318-319

collated printing, 206

collapse ribbon, 23

color

- applying to drawings, 77-78
- of themes, changing, 74
- print settings, changing, 223

Color and Weight tool (Ink), 327

combining drawings on a single sheet, 263

commands

- adding to ribbon, 25-27
- locating with Visio Options dialog box, 29

comments

- adding, 323-327
- hiding, 324-326
- Track Markup tool, 329-331

common format attributes, modifying, 173

compatibility with Office applications, 238-240

compressing images, 192

Compress Picture tool, 192

- configuring print features
 - headers and footers, 211-213
 - margins, 213-214
- connection points, adding, 140-142
- Connection Point tool, 141
- connections, creating with AutoConnector, 124-127
- connectors, 124-125
 - behavior
 - during drap operations, 132
 - when shapes are deleted, 133-134
 - when splitting connectors, 132-133
 - connection points, adding, 140-142
 - control handles, 138-139
 - creating
 - with AutoConnector, 125-127
 - with Connector tool, 127
 - formatting, 135
 - glue
 - dynamic, 130-131
 - point-to-point, 129-130
 - line jumps, 136-138
 - properties, 129
 - routing styles, 136
- Connector tool, 127
- containers, 103, 144-147
 - lists, 148
 - modifying, 147-150
- content, adding to CAD drawings, 200
- context menus, 31
- contextual ribbon
 - cross-functional flowcharts, 344-345
 - contextual tabs, 23
- control handles, 187
 - 1D shape handles, 35
 - 2D shape handles, 36
 - of connectors, 138-139
 - eccentricity handles, 37
 - vertex handles, 36
- controls available on tabs, 22
- conventions used in this book, 17-18
- copying
 - drawings, 47
 - shapes, 168
- creating
 - background pages, 64
 - connections with AutoConnector, 124-127

- connectors with Connector tool, 127
- custom themes, 75
- diagrams without templates, 46
- floor plans, 366-367
- flowcharts, 10-11
- groups, 103-106
- layers, 163-165
- master shapes, 94
- org charts, 361-365
- personalized stencils, 91-93
- reports, 279, 281-285
- ScreenTips, 155
- templates, 252, 255
- web pages from diagrams, 234
- cross-functional flowcharts, 150
 - contextual ribbon, 344-345
 - swimlanes, 343
 - resizing, 343
- Current View, printing portions of diagrams
 - with, 215-216
- curved lines, eccentricity handles, 37
- customizing
 - Data Graphics, 299-301
 - page orientation, 67
 - page settings, 63
 - ribbon, 24, 27
 - stencils, 91-93
 - templates, 45
- custom templates, creating, 252, 255
- custom themes, creating, 75

D

- data fields
 - saving, 276-278
 - shapes, 266-274
 - text, displaying, 278
- Data Graphics
 - adding, 296-298
 - customizing, 299-301
 - Position settings, changing, 300
- data linked from external source,
 - refreshing, 295
- Data tab, linking external data to shapes, 289-292
- Decision shapes, 339

- default print output versus High Quality output, 222
- deleting shapes, behavior of connectors during, 133-134
- Design tab
 - Auto Size tool, 69-71
 - pages, customizing, 67
 - Theme Gallery, 73
- Developing Microsoft Visio Solutions (Microsoft Press), 311
- diagrams
 - arranging with Position tool, 111-112
 - block diagrams
 - shapes, blending, 348
 - Block Diagram with Perspective template, 350
 - callouts, 151-154
 - cloning, 47
 - connection points, adding, 140-142
 - connectors, 124-125
 - behavior during drag operations, 132
 - behavior when deleting shapes, 133-134
 - behavior when splitting connectors, 132-133
 - control handles, 138-139
 - creating with AutoConnector, 125-127
 - creating with Connector tool, 127
 - dynamic glue, 130-131
 - formatting, 135
 - line jumps, 136-138
 - point-to-point glue, 129-130
 - properties, 129
 - routing styles, 136
 - containers, 144-147
 - creating without template, 46
 - footers, 157-159
 - gridlines, printing, 221
 - grouped shapes, when to avoid, 107
 - headers, 157-159
 - legends, inserting, 299
 - printing portions of, 215-216
 - saving
 - with AutoSave, 51-52
 - with Save As, 49
 - ScreenTips, 155
 - shapes
 - frequently used, 84-86
 - Quick Shapes stencil, 83
 - selecting, 82
 - templates, 42
 - Business templates, 44
 - categories of, 42-45
 - Engineering templates, 44
 - Flowchart templates, 44
 - General templates, 44
 - Maps and Floor Plans templates, 44
 - Network templates, 44
 - online templates, 49
 - personalized templates, 45
 - Schedule templates, 45
 - selecting, 45
 - Software and Database templates, 45
 - Template Gallery, 42
 - text boxes, 160
 - text fields, 160-162
 - validating, 346
 - web pages, creating, 234
 - dialog boxes
 - Field, 298
 - Layer Properties, 220
 - Page Setup, 63
 - Reorder Pages, 67
 - Ruler and Grid, 116
 - Visio Options
 - commands, locating, 29
 - ribbon, customizing, 25
 - dimension lines, 368-369
 - disabling task panes, 54
 - displaying
 - grid, 115-116
 - guides, 115-116
 - keyboard shortcuts, 39-40
 - page breaks in Print Preview pane, 208
 - printer properties, 205
 - ruler, 115-116
 - text in shape data fields, 278
 - distributing shapes, 113-114
 - drag operations, behavior of connectors during, 132
 - drawings
 - cloning, 47
 - checking out with SharePoint, 318-319
 - color, applying, 77-78
 - combining on a single sheet, 263
 - exporting to image formats, 240-242
 - headers and footers, adding, 157-159

- pages
 - adding, 62
 - background pages, creating, 64
 - renaming, 66
 - reorganizing, 66
 - resizing manually, 71
 - resizing with Auto Size tool, 69
 - resizing with Size tool, 68
 - settings, customizing, 63
 - themes, applying, 76
- saving with AutoSave, 51-52
- scale of, changing, 71
- shapes
 - frequently used, 84-86
 - Quick Shapes stencil, 83
 - selecting, 82
- sharing
 - with email, 228-229
 - with SkyDrive, 230-232
 - with social networks, 232
 - with Visio Viewer, 230
- shrinking to fit page, 259-260
- themes
 - categories, 72
 - color, changing, 74
 - custom themes, creating, 75
 - variants, 73
- tiled drawings, printing, 256-258

Drawing Scale tab, 71

drawing windows, 33, 53

- closing, 53
- opening second view of with New Window, 56
- Presentation mode, 57
- switching between, 55
- task panes, 34
- rulers and grids, 34

drop-down arrows, 23

duplicating

- drawings, 47
- pages, 63
- shapes, 168

dynamic glue, 130-131

Dynamic Grid tool

- arranging shapes with, 108-109
- shapes, aligning, 109

E

eccentricity handles, 37

editing

- Excel charts, 194
- groups, 107
- stencils, 93-96
- text, 176-177

effects, Embellishment feature, 76

email, sharing drawings with, 228-229

Embellishment feature, 76, 148, 360

enabling

- Presentation mode, 57
- task panes, 54

Engineering templates, 44

Excel charts

- editing, 194
- inserting, 194-196

expanding tool groups on ribbon, 25

exporting drawings to image formats, 240-242

external data

- linked data, refreshing, 295
- linking with shape masters, 295-296
- preparing to match shape data fields, 289
- shapes, inking, 288-294

external images, importing, 190

F

Favorites stencil, 89

Field dialog box, 298

fields, adding to headers and footers, 211

file formats

- image formats, exporting drawings to, 240-242
- older Visio formats, creating, 237
- PDF, 210, 236
- VSDX, 20, 50
- XML, creating, 237
- XPS, creating, 236

File tab, Backstage area, 31-33

Fill tool, 181

fixed lists, adding to Format field, 274

Flip Vertical tool, 114

floor plans

- creating, 366-367
- dimension lines, 368-369

flowcharts

- BPMN, 346
- creating, 10-11
- cross-functional, 150
 - contextual ribbon, 344-345
 - swimlanes, 343
- steps, connecting, 124-127
- subprocesses, 340

Flowchart templates, 44

Fluent UI (Fluent User Interface), 22

footers, 211-213

- adding to drawings, 157-159
- fields, adding, 211

Format Painter tool, 175

Format Picture dialog, 190

Format Shape pane, 174, 190

Format Shape task pane, applying color to drawings, 78

formatting

- connectors, 135
- multiple objects, 175
- shapes
 - common attributes, 173
 - less common attributes, 174-175
- text, 176-178

formulas, performing calculations on shape data field, 298

frequently used Quick Shapes, modifying list of, 86

frequently used shapes, 84

full screen mode, enabling, 57

G

General templates, 44

generating reports, 283-285

glue, 129

Goldsmith, John, 313

graphics, importing vector-based, 196

grid, 34, 115-116

gridlines, printing, 221

groups, 102

- creating, 103-106
- editing, 107
- resizing, 104
- rotating, 104
- when to avoid, 107
- when to use, 102

guides, displaying, 115-116

H

handles

- 1D shape handles, 35
- 2D shape handles, 36
- eccentricity handles, 37
- vertex handles, 36

headers, 211-213

- adding to drawings, 157-159
- fields, adding, 211

help information, Visio Help, 305-306

hiding

- comments, 324-326
- grid, 115-116
- ruler, 115-116

High Quality print output, 221-222

Highlighter tool (Ink), 327

Home tab

- Change Shape tool, 87-89
- color, applying to drawings, 77
- Connection Point tool, 141
- Distribute tools, 113-114
- Orient Shapes tools, 114-115
- Position tool, arranging diagrams, 111-112

Home Tab, straightening shapes with Auto Align tool, 110-111

Hopkins, Chris, 313

hyperlinks, 188

I

images

- clip art, 193
- external images, importing, 190
- resizing, 192
- resolution, adjusting, 192
- searching for, 193

SVG formatted images, 196
vector-based graphics, importing, 196

importing

CAD drawings, 197-199
external images, 190

improved touch support, 18

Info tab, 32

unnecessary data, removing from files,
331-334

Ink tools, adding comments to Visio drawings,
326-327

inserting

Excel charts, 194-196
pages in drawings, 62
SVG formatted images, 197

interface

Backstage area, 31-33
context menus, 31
drawing window, 33-34
Quick Access toolbar, 30
ribbon
 commands, adding, 25-27
 customizing, 24, 27
 tool groups, expanding, 25
status bar, 33

tabs

contextual tabs, 23
controls available on, 22
template tabs, 24

internal resources, Visio Help, 305-306

Internet Explorer, Visio Viewer, 230

J-K

johnvisiomvp.wordpress.com, 312

jumping between drawing windows, 55

keyboards, touch keyboards, 251

keyboard shortcuts

displaying, 39-40
ToolTips
revealing, 38

L

Layer Properties dialog box, 220

layers, 103

 creating, 163-165
 selecting items to print with, 219-220
 when to add, 165

Layout tool, 118-119

legends, inserting in diagrams, 299

less common format attributes, modifying,
174-175

libraries, SharePoint, 316

line jumps (connectors),
136-138

line properties of connectors, modifying,
135-138

lines

 curved lines, eccentricity handles, 37
 vertex handles, 36

link data, refreshing, 295

linking shapes, 288

 with Automatically Link, 293-294
 with Data tab, 289-292
 with dynamic glue, 130-131
 with point-to-point glue, 129-130
 with shape masters, 295-296

lists, 148

 adding to Format field, 274

locating

 commands with Visio Options dialog box, 29
 shapes with Search tool, 96-98

logical diagrams, 354-355

M

manual connections, creating with Connector
tool, 127

manually resizing pages, 71

Maps and Floor Plans templates, 44

margins, 211-214

Marshall, John, 312

masters, 90-91
 creating, 94
 creating based on grouped shapes, 106

maximizing print quality, 221-222

menus, context menus, 31

Microsoft Visio 2010 Business Process
 Diagramming and Validation (Parker), 311

Microsoft XPS Document Writer, 210

minimizing Shapes task pane, 54

mixed orientation drawings, printing, 260

modifying
 common format attributes, 173
 connectors with control handles, 138-139
 containers, 147-150
 less common format attributes, 174-175
 line properties of connectors, 135-138
 Quick Shapes, 84-86
 text blocks, 179
 title of background pages, 66

monotone printing, 223

More Shapes tab, 87

Mouse mode, switching to Touch mode,
 246-247

moving text blocks, 180-182

multiple objects, formatting, 175

N

network diagrams
 logical diagrams, 354-355
 rack diagrams, 355-357

Network templates, 44

new features in Visio 2013, 17
 improved touch support, 18
 streamlined layout, 18
 VSDX file format, 20

New Window button, opening second view of
 drawing window, 56

nonorthogonal angles, 139

O

Office applications, compatibility with, 238-240

office.com, 307-310

the official Visio blog, 307

older Visio formats, creating, 237

open drawing windows
 opening second view of, 56
 viewing with Arrange All, 55

opening Print Settings pane, 214

options for stencils, 86-87

Org Chart tab, 24

organization charts, 359
 creating, 363-365
 creating manually, 361
 photos, adding, 359-361

Organization Chart wizard, 363-365

organizing
 diagrams with containers, 144-147
 shapes
 with containers, 103
 with groups, 102
 with layers, 103
 with Layout tool, 118-119

orientation
 mixed orientation drawings, printing, 260
 of pages, changing, 67
 of paper for printing, changing, 206-208
 rotating shapes, 114-115

Orient Shapes tools, 114-115

overlapping shapes, troubleshooting with
 z-order, 118

overriding aspect ratio, 170

P

page breaks
 Avoid Page Breaks tool, 260
 displaying in Print Preview, 208

page scale, 259-260

pages
 adding to drawings, 62
 background pages
 creating, 64
 printing, 217-219
 title, modifying, 66

containers
 adding, 144-147
 modifying, 147-150

duplicating, 63

orientation, changing, 67

printing, 216

- renaming, 66
- reorganizing, 66
- settings, customizing, 63
- size of, selecting, 68-69
- themes, applying, 76
- Page Setup dialog box, 63, 213
- Page Size tab, 68
- panes
 - Format Shape, 174
 - Print Preview, displaying page breaks, 208
 - Print Settings
 - background pages, removing, 217
 - opening, 214
 - Print Settings, 204-205
 - Shapes, 82
 - Size and Position, 170
- paper orientation, changing for printing, 206-208
- Parker, David, 312
- PDF format
 - creating, 236
 - printing to, 210
- personalized templates, 45
- personalizing stencils, 91-93
- photos, adding to org charts, 359-361
- Picture Tools Format tab, 190
- plans, dimension lines, 368-369
- point-to-point glue, 129-130
- Pointer tool, handles
 - 1D shape handles, 35
 - 2D shape handles, 36
- Pointer tool (Ink), 327
- Position settings, changing for Data Graphics, 300
- Position tool, arranging diagrams, 111-112
- predefined scale, selecting for drawings, 71
- preparing external data to match shape data fields, 289
- Presentation mode, 33, 57
- printers, displaying properties, 205
- printing
 - background pages, 217-219
 - color settings, changing, 223
 - from Backstage, 204
 - background printing, 208
 - collation, 206
 - paper orientation, changing, 206-208
 - Print Settings pane, 204-205
 - gridlines, 221
 - headers and footers, configuring, 211-213
 - margins, configuring, 213-214
 - Microsoft XPS Document Writer, 210
 - mixed orientation drawings, 260
 - page breaks, displaying, 208
 - page scale, 259-260
 - PDF file format, 210
 - print area, selecting, 214-216
 - Print Preview pane, 208
 - selecting specific pages to print, 216
 - shapes, 219
 - tile drawings, 256-258
 - using layers, 219-220
- print jobs, testing, 210
- Print Preview pane, 208
- print quality, maximizing, 221-222
- Print Settings pane, 204-205
 - background pages, removing, 217
 - monotone printing, 223
 - opening, 214
- properties
 - of connectors, 129, 135-138
 - of printer, displaying, 205
 - of SmartShapes, viewing, 187

Q

- Quick Access toolbar, 22, 30
- Quick Shapes stencil, 83
 - frequently used shapes, modifying, 86
 - modifying, 84

R

- rack diagrams, 355-357
- Re-Layout Page drop-down, 118
- Recent Drawings list, copying drawings, 47
- reducing file size, 332-334

- refreshing data linked from external source, 295
- removing
 - background pages from Print Settings pane, 217
 - line jumps, 138
 - unnecessary data from files, 331-334
- renaming pages, 66
- Reorder Pages dialog box, 67
- reorganizing pages, 66
- Report Definition Wizard, 279-285
- reports
 - creating, 279-285
 - subtotals, adding, 285
 - totals, adding, 285
- resize handles, 170
- resizing
 - Auto Resize feature, 338
 - grouped shapes, 104
 - images, 192
 - pages
 - with Auto Size tool, 69
 - with Size tool, 68
 - shapes, 170-171
 - swimlanes, 343
 - text, 179
- resolution of images, adjusting, 192
- resources, office.com website, 307-310
- revealing ToolTips, 38
- Review tab, adding Track Markup tool, 329-331
- ribbon
 - commands, adding, 25-27
 - customizing, 24-27
 - tabs
 - contextual tabs, 23
 - controls available on, 22
 - template tabs, 24
 - tool groups, expanding, 25
 - right-click menus, 31
- rotate handles, 171
- rotating
 - grouped shapes, 104
 - shapes, 114-115, 171-172
- Roth, Chris, 312
- routing styles (connectors), 136

- ruler
 - displaying, 115-116
 - drawing window, 34
- Ruler and Grid dialog box, 116

S

- Save As
 - saving diagrams, 49
 - .vsdx format, 50
- saving
 - diagrams
 - with AutoSave, 51-52
 - with Save As, 49
 - shape data fields, 276-278
 - VSDX format, 50
- scale of drawings, changing, 71
- Schedule templates, 45
- ScreenTips, 155
- searching for images, 193
- Search tool, locating shapes with, 96-98
- selecting
 - items to print with layers, 219-220
 - print area, 214-216
 - shapes, 82
 - size of pages with Size tool, 68-69
 - specific pages to print, 216
 - specific shapes to print, 219
 - templates, 45
- shape data
 - fields
 - adding, 270-274
 - saving, 276-278
 - text, displaying, 278
 - lists, adding, 274
 - types of, 268
 - viewing, 186
- shapes
 - 1D, handles, 35
 - 2D
 - handles, 36
 - resizing, 170
 - aligning on Dynamic Grid, 109
 - arranging with Dynamic Grid tool, 108-109
 - attributes, formatting, 173-175
 - blending, 348

- callouts, adding, 151-154
- changing with Change Shape tool, 87-89
- comments
 - adding, 323-324
 - hiding, 324-326
- connection points, adding, 140-142
- connectors, 124-125
 - behavior during drag operations, 132
 - behavior when deleting shapes, 133-134
 - behavior when splitting connectors, 132-133
 - control handles, 138-139
 - creating with AutoConnector, 125-127
 - creating with Connector tool, 127
 - dynamic glue, 130-131
 - formatting, 135
 - line jumps, 136-138
 - point-to-point glue, 129-130
 - properties, 129
 - routing styles, 136
- containers, 103
- data fields, 266-274
- Decision shapes, 339
- distributing, 113-114
- duplicating, 168
- frequently used, 84-86
- groups
 - adding to stencils, 106
 - creating, 103-106
 - editing, 107
 - resizing, 104
 - when to avoid, 107
 - when to use, 102
- ink shapes, closing, 328
- layers, 103
- linking to external data, 288
 - refreshing linked data, 295
 - with Automatically Link, 293-294
 - with Data tab, 289-292
- locating with Search tool, 96-98
- masters, creating, 94
- multiple shapes, formatting, 175
- organizing with Layout tool, 118-119
- overlapping, changing z-order of, 118
- printing, 219
- Quick Shapes stencil, 83
 - frequently used shapes, 86
 - modifying, 84
- resizing, 170-171
- rotating, 114-115, 171-172
- selecting, 82
- stencils
 - available stencils, browsing, 87
 - customizing, 91-93
 - editing, 93-96
 - Favorites stencil, 89
 - masters, 90-91
 - options, 86-87
 - straightening with Auto Align tool, 110-111
- text blocks
 - background, changing, 181-183
 - modifying, 179
 - moving, 180-182
 - themes, changing, 76
 - ungrouping, 102
- Shapes pane, 82
- Shapes task pane, 54
 - minimizing, 54
 - undocking, 54
- SharePoint, 316
 - co-authoring, 320-322
 - libraries, 316
 - versioning, 320
 - Visio drawings, checking out, 318-319
- SharePoint 2013 Workflows, 347
- sharing drawings. *See also* collaboration
 - with email, 228-229
 - with SkyDrive, 230-232
 - with social networks, 232
 - with Visio Viewer, 230
- Size and Position pane, 170-172
- Size tool, selecting size of pages, 68-69
- SkyDrive, 50, 230-232
- SmartShapes, 185
 - control handles, 187
 - hyperlinks, 188
 - properties, viewing, 187
 - shape data, 186
 - smart tags, 188
- smart tags, 188
- social networks, sharing drawings with, 232
- Software and Database templates, 45
- Space shapes, 367-368
- spacing, 109
- splitting connectors, behavior of connectors
 - during, 132-133

status bar, 33

stencils

- browsing available stencils, 87
- Callout Stencil, 154
- customizing, 91-93
- editing, 93-96
- Favorites stencil, 89
- groups, adding, 106
- masters, 90-91
 - creating, 94
 - creating based on groups, 106
- options for, 86-87
- Quick Shapes, 83
 - frequently used, modifying list of, 86
 - modifying, 84
- Timeline, 357-359

steps, connecting in flowcharts, 124-127

straightening shapes with Auto Align tool, 110-111

streamlined layout, 18

Stroke Eraser tool (Ink), 327

subprocesses, 340

subtotals, adding to reports, 285

SVG formatted images, 196

swapping shapes with Change Shape tool, 89

swimlanes, 150, 343

switching

- between drawing windows, 53
- between Touch mode and Mouse mode, 246-247
- between windows, 53

T

tabs, 53

- controls available on, 22
- Data tab, linking external data to shapes, 289-292
- Drawing Scale tab, 71
- File tab, Backstage area, 31-33
- Home tab
 - Auto Align tool, 110-111
 - Change Shape tool, 87-89
 - color, applying to drawings, 77
 - Connection Point tool, 141
 - Distribute tools, 113-114
 - Orient Shapes tools, 114-115
 - Position tool, 111-112
- Info tab, 32
- More Shapes, 87
- Page Size tab, 68
- Print Setup, 68
- Print Setup tab, 68

task panes, 53

- anchoring, 55
- enabling/disabling, 54
- Format Shape, applying color to drawings, 78
- rulers and grids, 34
- Shapes task pane, 54

Template Gallery, 42-45

template tabs, 24

templates, 13-15, 42

- Block Diagram with Perspective, 349-350
- Business templates, 44
- categories of, 42-45
- creating, 252, 255
- diagrams, creating without, 46
- Engineering templates, 44
- Flowchart templates, 44
- General templates, 44
- Maps and Floor Plans templates, 44
- Network templates, 44
- personalized templates, 45
- Schedule templates, 45
- selecting, 45
- Software and Database templates, 45
- stencils, browsing available stencils, 87
- Template Gallery, 42
- Timeline, 357-359

testing print jobs, 210

text

- aligning, 179
- displaying in shape data fields, 278
- editing, 176-177
- formatting, 177-178
- resizing, 179

text blocks

- background, changing, 181-183
- modifying, 179
- moving, 180-182

Text Block tool, 180
 text boxes, 160
 Text Edit mode, 177
 text fields, 160-162
 Text tool, 177
 themes
 categories, 72
 color, changing, 74
 custom themes, creating, 75
 for shapes, changing, 76
 variants, 73
 tiled drawings, printing, 256-258
 timelines, 357-359
 title of background pages, modifying, 66
 tool groups, expanding on ribbon, 25
 tools
 Flip Vertical, 114
 Pointer tool, 35
 ToolTips, revealing, 38
 totals, adding to reports, 285
 touch controls, 248-251
 touch keyboard, 251
 touchscreens
 shapes, working with, 248
 touch controls, 248-251
 Touch mode
 switching to Mouse mode, 246-247
 Track Markup tool, 329
 adding to Review tab, 329-331
 troubleshooting overlapping shapes with
 z-order, 118
 types of shape data, 268

U

uncollated printing, 206
 undocking Shapes task pane, 54
 ungrouping shapes, 102
 unnecessary data, removing from files, 331-334
 uses for shape data, 268
 Using Visio 2010 (Roth, Que Publishing), 311

V

validating diagrams, 346
 variants of themes, 73
 vector-based graphics, importing, 196
 versioning (SharePoint), 320
 vertex handles, 36
 viewing
 open drawing windows with Arrange All, 55
 shape data, 186
 SmartShape properties, 187
 View tab
 Dynamic Grid tool, arranging shapes with,
 108-109
 task panes, enabling/disabling, 54
 visguy.com, 311
 Visio 2010 Step by Step (Helmert, Microsoft
 Press), 311
 VisioCafe, 313
 Visio Help, 305-306
 visio.mvps.org, 313
 Visio Options dialog box
 commands, locating, 29
 ribbon, customizing, 25
 Visio Professional 2013, 16
 Visio Pro for Office 365, 16
 Visio Standard 2013, 16
 Visio Viewer, 230, 304
 visualssignals.typepad.co.uk, 313
 VSDX file format, 20, 50

W

web pages, creating from diagrams, 234
 websites
 bvisual.net, 312
 johnvisionmvp.wordpress.com, 312
 office.com, 307-310
 visguy.com, 311
 visiocafe.com, 313
 visio.mvps.or, 313
 visualsignals.typepad.co.uk, 313

windows

drawing windows, 53

closing, 53

opening second view of with New, 56

Presentation mode, 57

switching between, 55

tabs, 53

workflows, SharePoint 2013 Workflows, 347

X-Y-Z

XML file format, creating, 237

XPS file format, creating, 236

zooming in and out with Print Preview, 208

z-order of shapes, changing, 118