Microsoft Visio 2002(XP)
Shortcourse – Handout

Copyright 2004 Technology Support, Texas Tech University. ALL RIGHTS RESERVED. Members of Texas Tech University or Texas Tech Health Sciences Center may print and use this material for their personal use only. No part of this material may be reproduced in any form without written permission from the author.

Microsoft Visio 2002 is a 2-hour non-credit course designed as an introductory course to Visio 2002.

Introduction
Microsoft Visio 2002 provides a broad range of diagramming solutions to help people communicate ideas, information, and systems. Visio creates types of documents that allow people to visualize the concepts, procedures, product information, specifications and many more images at a glance. These images are placed in charts, tables, process flows, floor plans, and other Visio standard templates.

Course Objective:
- Learn and use the Visio tools such as connectors, shapes, text, drawing tools and stencils;
- Create a drawing with the importing and exporting feature in Visio; and
- Create a Flowchart, Organization Chart, and Project Scheduler.

Getting Started with Visio
Understanding Visio and working within Visio requires an understanding of the tools of Visio. An introduction of how to use connectors, shapes, text, drawing tools, and stencils will allow users a better understanding of a template within Visio.

**Drawing Page** – The area where the drawings or charts will be placed.

**Shape** – The base of the diagram or drawing.

**Connector** – Connects the shapes, which shows the correlation between shapes.
**Stencils and Shapes** – Visio provides ready-to-use templates, which contain stencils that contain pre-drawn shapes that are used to develop a document.

- Opening a template will open the stencils, which contain shapes for that specific type of drawing.
- Shapes are dragged from the stencils and placed onto the drawing. This technique is called a drag-and-drop.
- Other shapes can be used that are not in that specific Stencil.
- Placing the shapes on the drawing creates the effect the user would like to create.
- This section will cover:
  - Understanding shapes;
  - Placement of shapes; and
  - Formatting of shapes.

**Connectors** – Connectors connect shapes in a diagram that make specific drawing tasks faster and easier to create the document. Connectors are special in that they are a line that can automatically find the best route between shapes.

- Understanding connectors will assist you in your drawing or diagram.
- A connector is a special tool that will allow the user to manipulate the shapes without concern of the connectors.
- This section will cover:
  - Understanding connectors;
  - Placement of connectors;
  - Connections points and glue; and
  - Changing connection behaviors.
**Text** – Any shape, line, and connector can contain text. The idea of text is designed so that the user does not spend much time on formatting the text, but rather creating the diagram.

- Just as with any other Microsoft product, working with text in Visio is simple, and the tools of text are the same as in Word.
- This section will cover:
  - Understanding text;
  - Manipulating text;
  - Formatting text;
  - Callouts and annotating drawing;
  - Page presentation; and
  - Searching for text and using spell check.

**Panning and Zooming** – to get a better look at a diagram, you can zoom in and out to see the entire page.

- Using the panning and zooming tool.
- Docking the panning and zooming window.
- Using Keyboard shortcuts to zoom in and out of a diagram quickly.

<table>
<thead>
<tr>
<th>Keyboard Shortcut</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Press Shift &amp; Ctrl &amp; left mouse button</td>
<td>Zooms in</td>
</tr>
<tr>
<td>Press Shift &amp; Ctrl &amp; right mouse button</td>
<td>Zooms out</td>
</tr>
<tr>
<td>Press Shift &amp; Ctrl &amp; drag with the left mouse button</td>
<td>Zooms in on a selected area</td>
</tr>
<tr>
<td>Press Shift &amp; Ctrl &amp; drag with the right mouse button</td>
<td>Pans the drawing page</td>
</tr>
</tbody>
</table>

**Drawing Explorer** – this tool provides an alternative view of your diagram, which with some type of documents is helpful to see a hierarchical list of shapes and other objects.

- Using the Drawing Explorer by adding, deleting, and editing items in a drawing.
Working with Templates
- When opening a blank or new drawing page, Visio starts up with no stencils, which means there are no shapes associated with it. However, an advantage of starting with a template is that the stencils for that template will open.
- A template is designed to help you solve formatting and design issues.

Flowcharts (EXERCISE)
- Flowcharts are designed to assist many industries in management change, continuous improvement, business processes, and many other planning or structure standards or processes.
- They are used to impact readers visually.
This section will cover:
  - Creating a basic flowchart;
  - Numbering flowchart shapes; and
  - Creating a cross-functional flowchart.

Organization Charts (EXERCISE)
- Organization charts provide a visual view of relationships within any organization. For example, who reports to whom and the responsibilities of the levels.
- Organization charts also allow you to store data of each employee.
This section will cover:
  - Understanding Organization Chart tools;
  - Creating an Organization Chart manually;
  - Importing data to create a Organization Chart; and
  - Formatting an Organization Chart.

Project Scheduler
- For many industries scheduling projects or project management is a crucial aspect of the business.
- This section will briefly cover the four different types of templates used in Visio:
  - Timeline – mainly used to develop milestones in high-level projects using time and dates.
  - Gantt Chart – provides a hierarchical view of the entire date span of a project. Also provides a way to see how much of a task has been completed and track that task until completed.
  - Calendar – used to create yearly, monthly, or daily calendars.
  - PERT Chart – this is used to document project tasks, duration and milestones that help in planning complex projects.

For more information please visit:
- [http://cbt.ttu.edu](http://cbt.ttu.edu)
- [http://microsoftoffice.com](http://microsoftoffice.com)

Where To Get Help
If you need help with your project, you may contact Help Central Office at 742-HELP. There is online documentation (including PDF) for Visio at [http://www.itts.ttu.edu/documentation/](http://www.itts.ttu.edu/documentation/). If you need help from your instructor, you may e-mail amy.boren@ttu.edu.