CHAPTER 1

GETTING TO KNOW MICROSOFT VISIO

INFOCUS

WPL_V501

Microsoft Visio 2010 is a graphical and drawing application that helps you to visualise and communicate complex information. With Visio, you can transform complicated text and tables that are hard to understand into Visio diagrams that communicate information at a glance.

Visio provides modern shapes and templates for a diverse range of diagramming needs, such as IT management, process modelling, building and architecture, user interface design, human resource management, project management, and more.

In this session you will:

- ✓ learn how to start *Microsoft Visio 2010*
- ✓ learn how to create a blank drawing from a template
- ✓ gain an understanding of the *Visio* screen
- ✓ gain an understanding of how *Microsoft Visio 2010* works
- ✓ learn how to use the *Ribbon*
- ✓ learn how to use the keytip badges on the ribbon
- ✓ learn how to minimise the ribbon
- ✓ gain an understanding of *Backstage View* in *Microsoft Visio*
- ✓ learn how to access the *Backstage View*
- ✓ learn how to use shortcut menus
- ✓ gain an understanding of how dialog boxes work
- ✓ learn how to launch a dialog box
- ✓ gain an understanding of the *Quick Access Toolbar*
- ✓ learn how to add commands to the *Quick Access Toolbar*
- ✓ gain an understanding of the status bar
- ✓ learn how to customise the status bar
- ✓ learn how to save a new drawing
- ✓ learn how to exit correctly and safely from *Microsoft Visio 2010*.

STARTING VISIO

To create a new drawing or to edit an existing one, the first thing you need to do is to *start Microsoft Visio 2010*. There are several ways of doing this. For instance, you can start Visio from the Windows *Start menu*, from a *shortcut* or even directly from a drawing itself by clicking on a drawing icon. We'll use the *Start* menu in this exercise.

Try This Yourself:

Before you begin, ensure that your computer is switched on and that the Windows desktop is displayed on your screen…

1 Click on the Windows *Start* button at the bottom left-hand corner of the screen to display the menu

It's a round button with the Windows logo...

2 Click on **All Programs**

3 Click on **Microsoft Office**

4 Click on **Microsoft Visio 2010**

After a moment the Backstage view will open in Visio ready for you to either create a new diagram or open an existing diagram

---
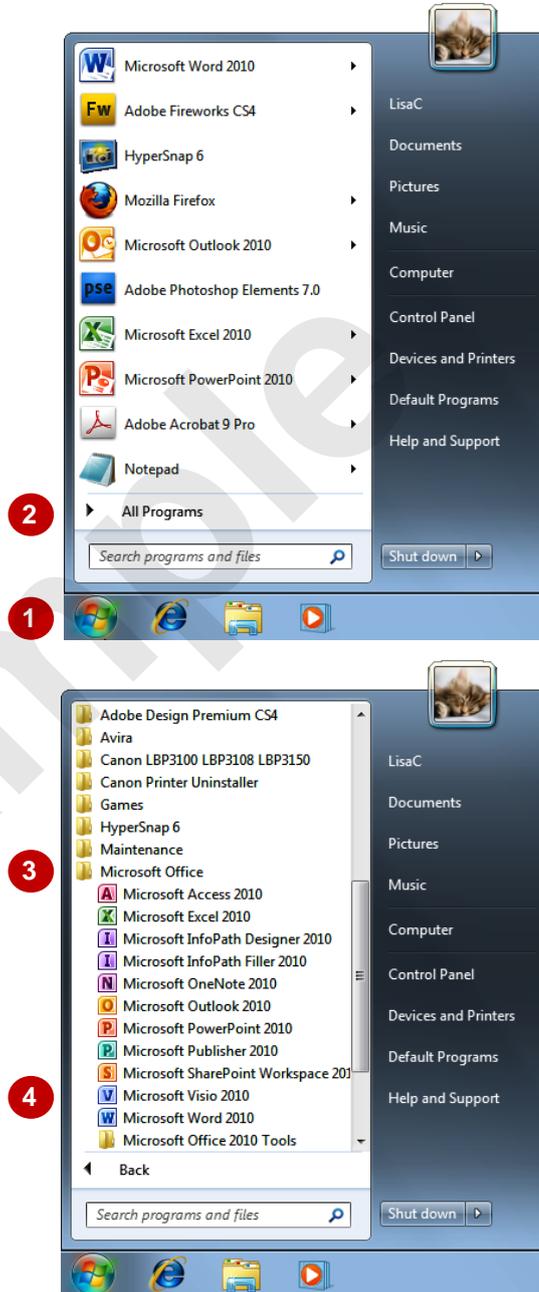
For Your Reference…

To *start Microsoft Visio*:

1. Click on the Windows *Start* button
2. Click on **All Programs**
3. Click on **Microsoft Office**
4. Click on **Microsoft Visio 2010**

Handy to Know…

You can also start Visio by:

- Double-clicking on a Visio *shortcut*
- Double-clicking on a drawing file icon in *a file listing*
- Choosing a drawing from the *Recent* list on the *Start* menu.

CREATING A NEW DRAWING FROM A TEMPLATE

All new drawings in Microsoft Visio are based on a ***template***. Microsoft Visio includes a wide range of templates that you can choose from. The templates are grouped according to type (e.g. Flowcharts, Maps and Floor Plans etc) and each template is accompanied by one or more stencils. A stencil is a collection of shapes designed specifically for different types of drawings.

Try This Yourself:

Before starting this exercise ensure that Visio has started.

The New window in the Backstage will be opened by default. This contains the templates that you use to start a drawing in the central pane and a preview of the selected template in the right pane…

1 Ensure that ***Basic Flowchart (Metric)*** is selected under ***Recently Used Templates***

  A summary of what you'd use a flowchart for and what is included is shown in the preview pane...

2 Click on ***Flowchart*** under ***Template Categories***

  A number of flowchart templates will display under Choose a Template...

3 Ensure that ***Basic Flowchart*** is selected under ***Choose a Template*** and that ***Metric Units*** is selected under the preview pane

4 Click on **[Create]**

  A blank drawing will be created and the Basic Flowchart Shapes stencil will appear on the left side of the screen

A brief description of what you can use the selected template is included in the right pane
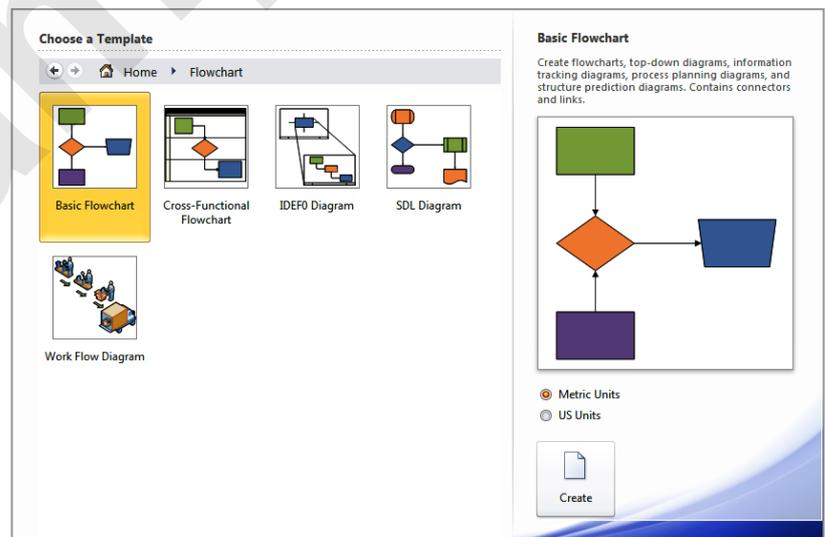
For Your Reference…

To ***create*** a ***blank drawing*** from a ***template***:

1. Click on the ***File*** tab and click on **[New]**
2. Click on a ***Template Category***
3. Click on a drawing type
4. Click on **[Create]**

Handy to Know…

- To open a new, blank drawing not based on any template, click on ***Blank drawing*** under ***Other Ways to Get Started*** in the ***Backstage*** (***New*** tab), then click on **[Create]**.

THE VISIO SCREEN

The *Microsoft Visio 2010 screen* may appear cluttered and overwhelming at first glance. There are, however, three key areas within the screen. These include the Ribbon at the top of the screen, the drawing page occupying the majority of the screen and the stencil area situated to the left of the drawing page. These areas are examined more closely below.
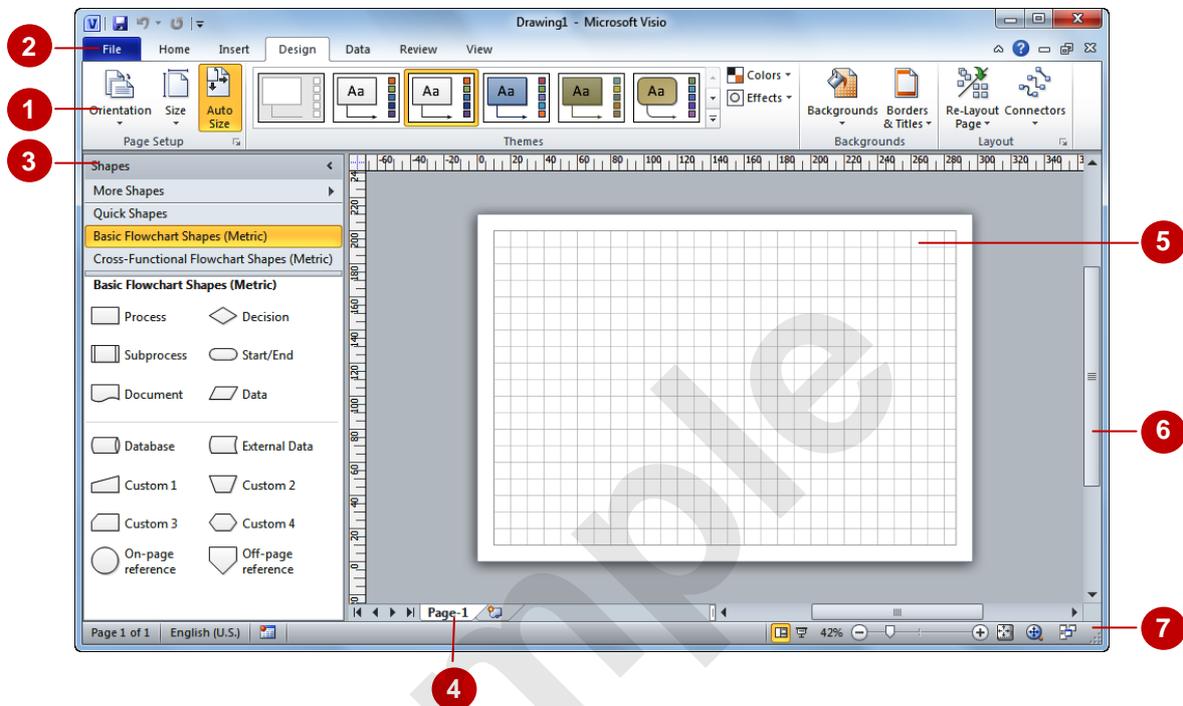
1 The *Ribbon* is the tabbed band that appears across the top of the window. It is the control centre of Visio 2010. Instead of menus, you use the *tabs* on the Ribbon to access the *commands* that have been categorised into *groups*. The commands include *galleries* of options that you can select from, such as the *Themes* gallery shown here.

2 The *File* tab is used to access the *Backstage view* which contains file management functions, such as saving, opening, closing, printing, sharing, and so on. *Visio Options* are also available so that you can set your working preferences and options for Visio 2010.

3 The *Shapes window* displays the stencils that are currently open for the drawing. *Stencils* are palettes of shapes that you can use to create a drawing. The stencils that appear in the *Shapes* window depend on the template on which the drawing is based. For example, the drawing in the sample above was based on the *Basic Flowchart* template and by default, two stencils open for this template: *Basic Flowchart Shapes* (which is open in the *Shapes* window above) and *Cross-Functional Flowchart Shapes* – the *Quick Shapes* stencil is always open in the *Shapes* window. The title bars for the open stencils are shown at the top of the *Shapes* window. Click on a title bar to see the shapes in the stencil.

Clicking on *More Shapes* near the top of the *Shapes* window displays an extensive stencil menu from which you can open and create stencils, search for specific shapes and more.

4 A drawing can comprise more than one page and the *page tabs* let you swap between pages. You can add a new page by clicking on the *Insert Page* tab, located immediately to the right of the page tabs.

5 The *Drawing Page area* is used to construct your drawing. You can zoom in and out of the page area and set the page dimensions to match the paper size you require.

6 The *Scroll bar* indicates your current position in the page. It lets you move to other positions in the page by clicking or dragging. The arrows can also be used to move up and down the page.

7 The *Status Bar* appears across the bottom of the window. It displays quite a few options in its default state including page number, language, height, width, angle, macro recorder, switch windows, and zoom commands such as the zoom slider and access to the *Pan & Zoom* window.

HOW MICROSOFT VISIO 2010 WORKS

For a new user the Visio 2010 screen may seem tricky – particularly the commands area at the top of the screen. The screen comprises three key areas. The drawing you create is placed on a *page*. The data can be manipulated using commands on the *Ribbon*. The page is part of a larger entity known as a file, and everything you do to the file is controlled in *Backstage view*.

The Drawing Page

You can create a new drawing based on a template. When you select a template, a new blank drawing page will open. The stencils, containing the appropriate shapes for the template, will also open. By dragging the shapes onto the page, you can create a drawing, such as the sample pivot diagram shown to the right.

The Ribbon

When you need to do something to the page or to a shape on the page, such as insert an image or format the selected shape, you'll find all of the relevant commands on the *Ribbon*. The *Ribbon* has the commands organised thematically using a series of tabs across the top.
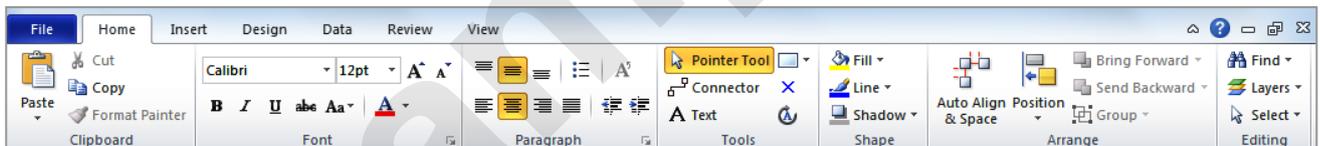
Backstage View

When you want to do something with your drawing such as save it so that you can access it again later, preview it, print it, send it to your boss, or whatever, you will need to access the *Microsoft Office Backstage view* of Microsoft Visio. *Backstage view* is accessed using the **File** tab on the *Ribbon*. Rather than offering you commands on a *Ribbon*, *Backstage* occupies the entire screen and has a series of options down the left side. In our sample to the right, the *Save & Send* option is active, and that is why you can see a series of save and send options on the right side of the *Backstage view*.
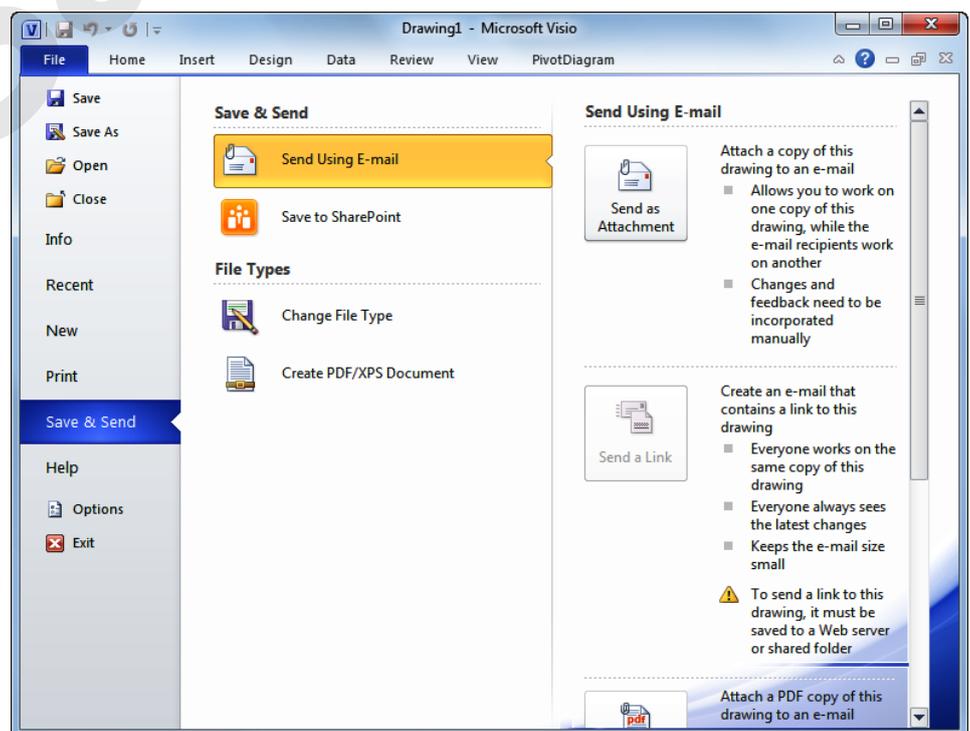
USING THE RIBBON

The **Ribbon** is the command centre for Visio. It provides a series of **commands** organised into **groups** that are placed on relevant **tabs**. Tabs are activated by clicking on their name to display the command groups. Commands are activated by clicking on a button, tool or gallery option. Everything you could possibly want to do in Visio will be found somewhere on the Ribbon.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open…

1 Examine the groups on the **Home** tab

These contain the most commonly used commands, including copy and paste, font and paragraph formatting, tools and editing...

2 Click on the **Insert** tab

The commands on this tab are used to create pages and insert items such as illustrations, diagram parts and text objects...

3 Click on **Container** in the **Diagram Parts** group to display the **Container** gallery

This includes 12 containers that you can use to place around selected shapes in the diagram...

4 Click on each of the tabs and examine the commands

Some of these open dialog boxes...

5 On the **View** tab, click on **Zoom** in the **Zoom** group to open the **Zoom** dialog box

**6** Click on **[Cancel]** then click on the **Home** tab

---
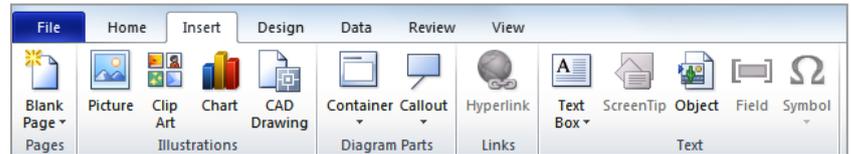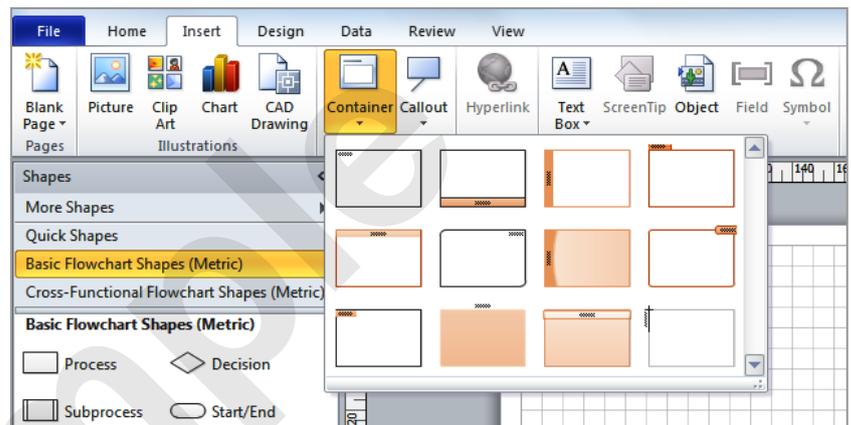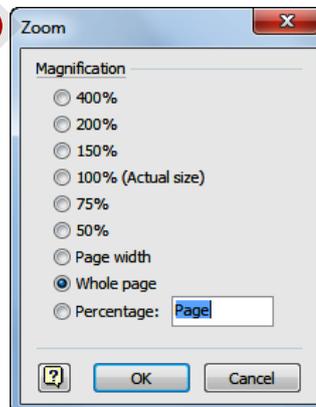
For Your Reference…

To **use** the **Ribbon**:

1. Click on a tab to display the commands
2. Click on a tool to activate a command, display a gallery or display a dialog box

Handy to Know…

- Additional tabs known as **Contextual tabs** appear in specific circumstances. For example, if you insert a picture, the **Picture Tools: Format** tab will appear. This provides quick access to all of the tools you may need to modify and work with the picture.

USING RIBBON KEYTIPS

The **Ribbon** is normally accessed with a mouse. However, you can also use the keyboard to access **Ribbon** commands. When you press `Alt`, the letters known as **key tips** or **access keys**, will appear next to commands on the ribbon. Pressing a key on the keyboard will activate the corresponding command on the **Ribbon** just as if you'd clicked the command with the mouse.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open…

1 Press `Alt` to display the **KeyTips**

2 Press `N` to activate the **Insert** tab and display the keytips for the **Insert** commands

3 Press `A` to display the **Callout** options

You can use the arrow keys `↑` and `↓` to move through the options...

4 Press `Esc` twice to return to the previous level of access keys

5 Press `Tab` several times to cycle through the commands on the **Insert** tab

6 Press `Esc` to return to normal mode
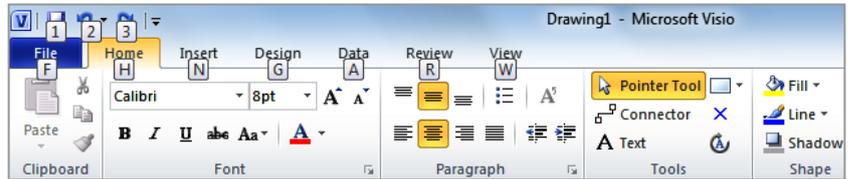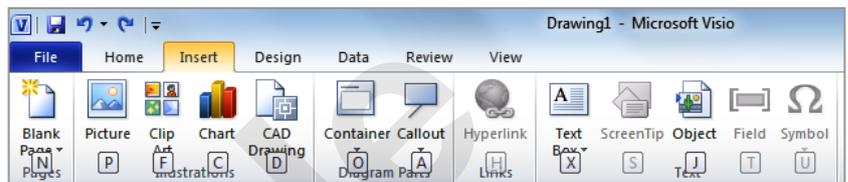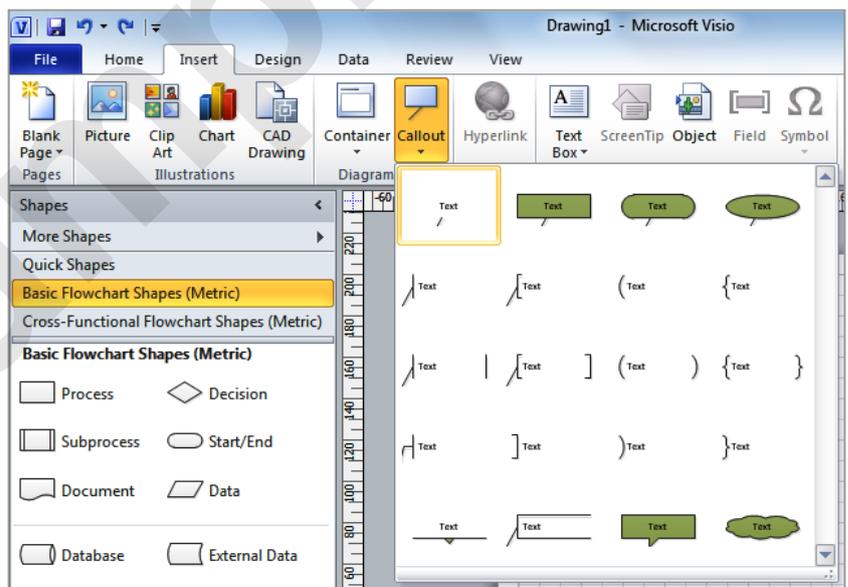
For Your Reference…

To **use KeyTips** to access commands:

1. Press `Alt` to display the **KeyTips**
2. Press the letter key of the command or tab that you want to select
3. Press `Esc` to return to normal mode

Handy to Know…

- You can still use the shortcut keys for menu commands that were available in previous versions of Office. For example, `Ctrl` + `B` applies bold to selected text.

MINIMISING THE RIBBON

The **Ribbon** at the top of the screen, valuable as it is, does tend to occupy a reasonable amount of space. You can minimise the **Ribbon** so that only the tabs remain visible. You can minimise the **Ribbon** as a once-off operation, or have it remain constantly minimised and display full commands only briefly while a tab has been clicked.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open…

1 Click on the **Insert** tab to display the **Insert** commands

2 Double-click on the **Insert** tab to minimise the ribbon

While the tabs stay visible, the rest of the commands are hidden...

3 Click on the **Review** tab to redisplay the ribbon, this time with the **Review** commands

4 Click back in the drawing

The ribbon will hide again – it only becomes visible when you need it. You can redisplay it permanently though...

5 Double-click on the **Design** tab to redisplay the **Ribbon** permanently

6 Click on the **Home** tab
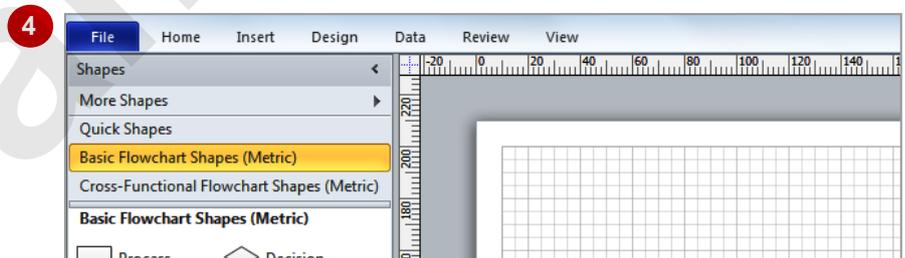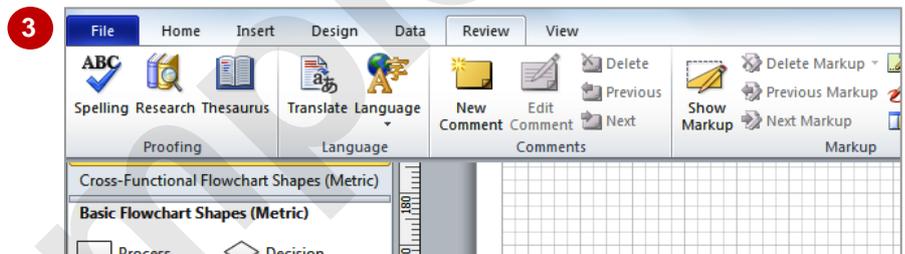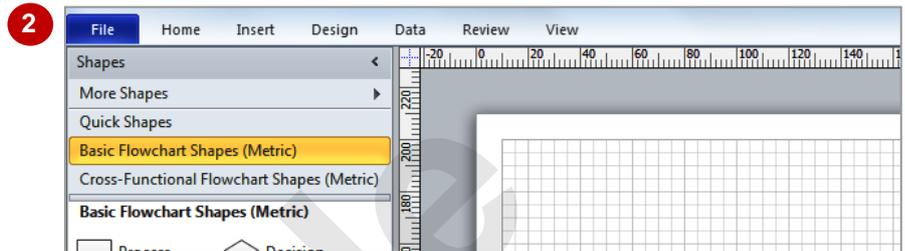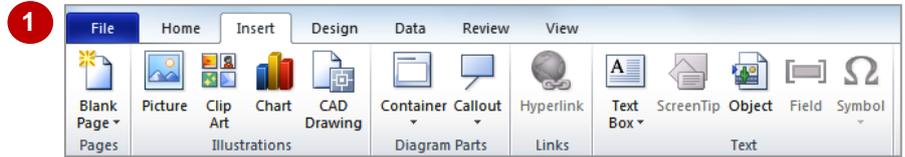
For Your Reference…

To **hide/display** the **Ribbon**:

1. Double-click on the active tab to hide the **Ribbon**
2. Click on a tab to see the **Ribbon** temporarily
3. Double-click on a tab to redisplay the **Ribbon** permanently

Handy to Know…

- You can also minimise the **Ribbon** by clicking on **Minimise the Ribbon** ⌃ and then maximise it again by clicking on **Expand the Ribbon** ⌄. These buttons are located at the right end of the **Ribbon**.

UNDERSTANDING THE BACKSTAGE VIEW

The **Ribbon** lets you work *on the content* in a drawing – you can add more content, format it, copy it, and much more. The **Backstage view**, which is accessed using the **File** tab, provides access to frequently used features for *managing* your drawing. You can save it to use it later, print it on paper, send it via email, and more using the options found in **Backstage view**.

The Backstage View

The **File** tab on the **Ribbon** is not a normal tab – as you can tell by the fact that it is coloured. Clicking on the **File** tab launches a mini-program within Microsoft Visio known as **Backstage View**. **Backstage**, as it's known for short, occupies the entire screen although the tabs from the **Ribbon** still remain visible across the top.

At the left of the **Backstage** is a navigation pane which is made up of **Quick commands**, smallish buttons which will perform an operation immediately, and largish **tabs**, which display more options and information to the right of the screen.

The whole underlying purpose of the **Backstage** is to let you save your drawing, share it with others and let you set options for Microsoft Visio.
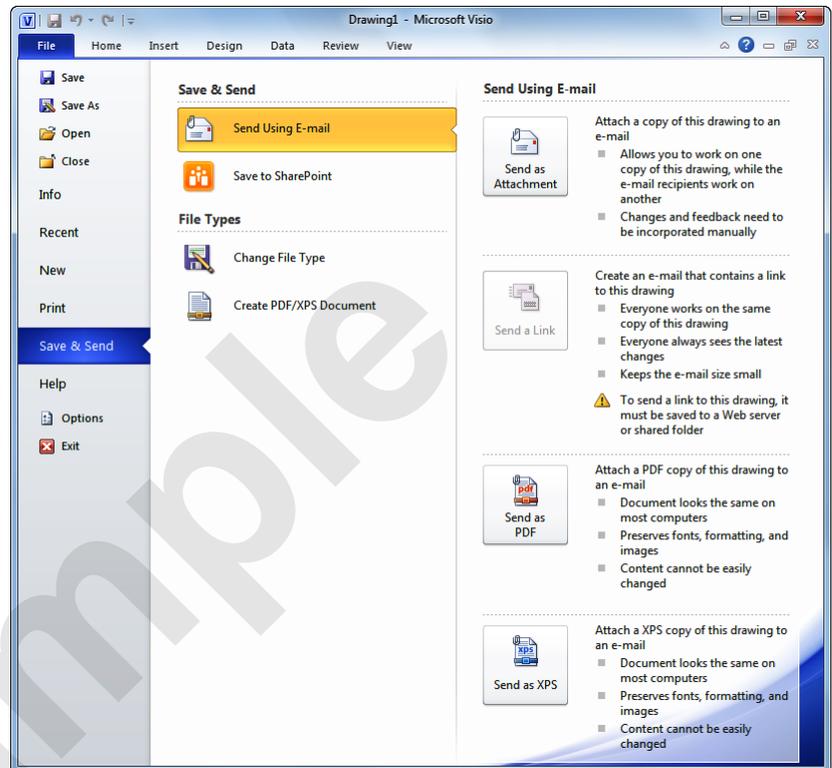
Quick Commands

The **Quick commands** provide immediate access to an operation.
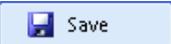
Save	Saves the current drawing
Save As	Allows you to save the current drawing under a different name or location
Open	Opens a previously saved drawing
Close	Closes the current drawing
Options	Provides access to options that allow you to control how Visio looks and works
Exit	Allows you to close and exit Microsoft Visio
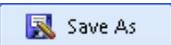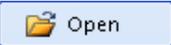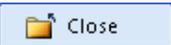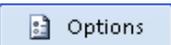
Backstage Tabs

The **Backstage tabs** provide more options for working with a drawing.

|	
Info	Provides status information about the current drawing and lets you remove personal information and reduce the file size
Recent	Provides a list of recently saved drawings
New	Lets you create a new drawing and provides access to a large gallery of templates
Print	Lets you print the current drawing and preview it
Save & Send	Lets you share your drawing with other people
Help	Provides access to Microsoft's help network and also provides licensing information about your software
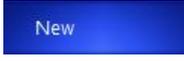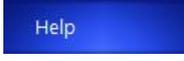
ACCESSING THE BACKSTAGE VIEW

The *Backstage View* provides options for working on drawings and key information about the status of Microsoft Visio 2010. It is usually accessed by clicking on the *File* tab to the left of the *Ribbon*, but it can also appear when specific commands and options in the *Ribbon* have been selected.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open…

1 Click on the *File* tab on the *Ribbon* to display the *Backstage view*, then click on the *Info* tab if it is not already selected

2 Spend a few moments studying the properties, dates and related people information at the right

3 Click on the *Print* tab (at the left) to see commands for printing and previewing the drawing

4 Click on the *Help* tab (on the left) to see the help options and also product licensing and information

5 Click on the *Home* tab of the *Ribbon* to close *Backstage view* and return to the drawing
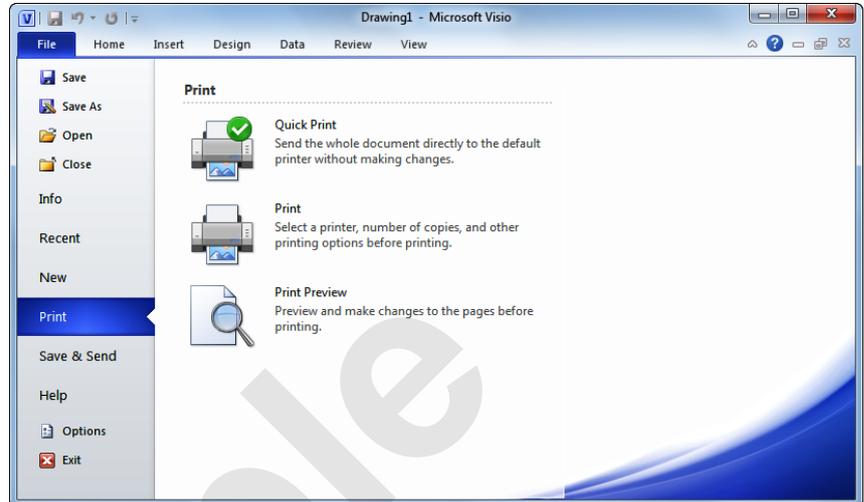
3

4

For Your Reference…

To access the *Backstage view*:

1. Click on the *File* tab on the *Ribbon*
2. Click on the desired tab or *quick command* at the left

Handy to Know…

- You can also close the *Backstage view* by pressing ⌑Esc⌑.

- If you have no drawings open in Visio as you access the *Backstage View*, the *New* tab will be selected by default allowing you to quickly create a new drawing.

USING SHORTCUT MENUS

In addition to the *Ribbon*, Visio also features *shortcut menus* that appear when you right-click in an area on the screen or on an object. The content of the menu will vary depending upon where you click. *Shortcut menus* provide an alternative, usually a quick one, to trudging through the *Ribbon* to find a specific operation or command.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open…

1 Drag any shape from the *Basic Flowchart Shapes* stencil (at the left of the screen) onto the drawing page, then move the mouse pointer over the shape and click with the *right* mouse button to display a *shortcut* or *contextual menu*

Because you have clicked on a shape in the drawing the menu includes commands that relate to working with shapes...

**2** Click anywhere on the page with the *left* mouse button to close the shortcut menu

3 *Right-click* on the title bar of the *Shapes* window to display a shortcut menu

Notice how it differs from the previous menu. Visio has made an educated guess about what you want to do based upon what you have clicked...

4 *Right-click* on one of the *tabs* on the ribbon

A different menu will display…

5 Click anywhere on the page with the *left* mouse button to close the shortcut menu
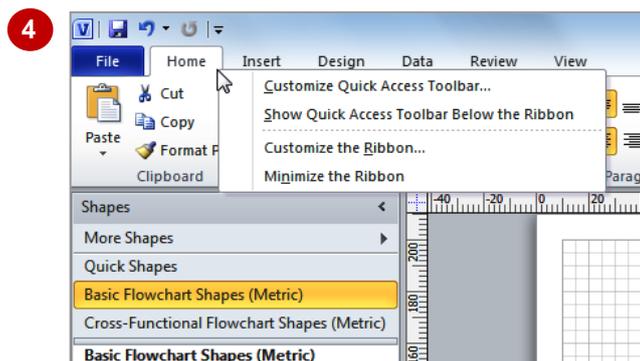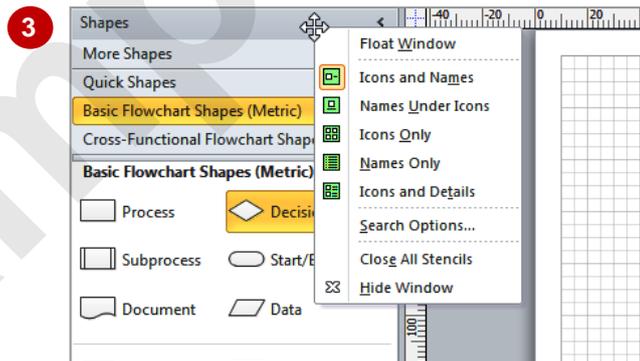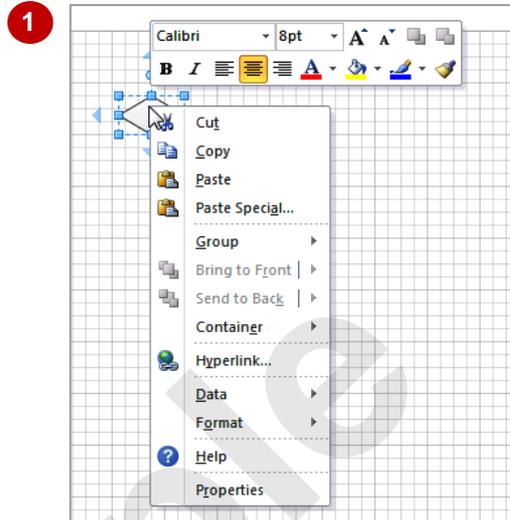
For Your Reference…

To *display* a *shortcut menu*:

1. Point to the object or area of the screen on which you want to perform an operation
2. *Right-click* to display the shortcut menu

Handy to Know…

- Once a *shortcut menu* appears, the options in it are selected by clicking on them with the left mouse button or by pressing the underlined letter in the menu option.

UNDERSTANDING DIALOG BOXES

Dialog boxes contain a series of controls that are used to adjust settings for a particular aspect of a drawing. They appear either when you click on a *dialog box launcher* at the bottom right corner of a group, or when you click on a command that displays a dialog box. Dialog boxes are often used for adjusting some of the more advanced aspects of a drawing.

Typical Dialog Box Controls

Dialog boxes have various tools to help you perform tasks. These tools are known as *controls* and some typical ones are shown below.

Tabs are used to provide more settings on the one dialog box

Preview boxes provide a preview of what the selected settings will look like

Check boxes turn settings either on or off. When on they display a tick and therefore these controls are also known as tick boxes

Drop arrows provide a list of options for the text box when the arrow is clicked. The list "drops down" from the arrow

Command buttons provide a means of saving the changed settings [OK], or closing the dialog box without accepting any changes made [Cancel]