Microsoft

Microsoft Visio 2016

Step by Step

Scott A. Helmers

PRACTICE FILES

Microsoft

Microsoft Visio 2016 Step by Step

Scott A. Helmers

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Introduction

Welcome! This *Step by Step* book has been designed so you can read it from the beginning to learn about Microsoft Visio 2016 and then build your skills as you learn to perform increasingly specialized procedures. Or, if you prefer, you can jump in wherever you need ready guidance for performing tasks. The how-to steps are delivered crisply and concisely—just the facts. You'll also find informative, full-color graphics that support the instructional content.

Who this book is for

Microsoft Visio 2016 Step by Step is designed for use as a learning and reference resource by home and business users of Microsoft Office programs who want to use Visio to create a variety of diagrams for business and personal use. The content of the book is designed to be useful for people who have previously used earlier versions of Visio and for people who are discovering Visio for the first time.

The *Step by Step* approach

The book's coverage is divided into parts representing general Visio skill sets. Each part is divided into chapters representing skill set areas, and each chapter is divided into topics that group related skills. Each topic includes expository information followed by generic procedures. At the end of the chapter, you'll find a series of practice tasks you can complete on your own by using the skills taught in the chapter. You can use the practice files that are available from this book's website to work through the practice tasks, or you can use your own files.

Adapt procedure steps

This book contains many images of user interface elements (such as the ribbon and the app windows) that you'll work with while performing tasks in Visio on a Windows computer. Depending on your screen resolution or app window width, the Visio ribbon on your screen might look different from that shown in this book. (If you turn on Touch mode, the ribbon displays significantly fewer commands than in Mouse mode.) As a result, procedural instructions that involve the ribbon might require a little adaptation.

Simple procedural instructions use this format:

1. On the **Insert** tab, in the **Illustrations** group, click the **Pictures** button.

If the command is in a list, our instructions use this format:

1. On the **Home** tab, in the **Editing** group, click the **Layers** arrow and then, in the **Layers** list, click **Layer Properties**.

If differences between your display settings and ours cause a button to appear differently on your screen than it does in this book, you can easily adapt the steps to locate the command. First click the specified tab, and then locate the specified group. If a group has been collapsed into a group list or under a group button, click the list or button to display the group's commands. If you can't immediately identify the button you want, point to likely candidates to display their names in ScreenTips.

Multistep procedural instructions use this format:

1. Display the Backstage view.
2. In the left pane of the Backstage view, click **New**.
3. On the **New** page, click **Categories**, click the **Business** thumbnail, and then double-click the **Organization Chart** template.

On subsequent instances of instructions that require you to follow the same process, the instructions might be simplified in this format because the working location has already been established:

1. On the **New** page of the Backstage view, click **Categories**, click the **Business** thumbnail, and then double-click the **Organization Chart** template.

The instructions in this book assume that you're interacting with on-screen elements on your computer by clicking (with a mouse, touchpad, or other hardware device). If you're using a different method—for example, if your computer has a touchscreen interface and you're tapping the screen (with your finger or a stylus)—substitute the applicable tapping action when you interact with a user interface element.

Instructions in this book refer to Visio user interface elements that you click or tap on the screen as *buttons*, and to physical buttons that you press on a keyboard as *keys*, to conform to the standard terminology used in documentation for these products.

When the instructions tell you to enter information, you can do so by typing on an external keyboard, tapping an on-screen keyboard, or even speaking aloud, depending on your computer setup and your personal preferences.

Download the practice files

Before you can complete the practice tasks in this book, you need to download the book's practice files to your computer from *http://aka.ms/Visio2016sbs/downloads*. Follow the instructions on the webpage.

IMPORTANT Visio 2016 is not available from the book's website. You should install that app before working through the procedures and practice tasks in this book.

You can open the files that are supplied for the practice tasks and save the finished versions of each file. If you later want to repeat practice tasks, you can download the original practice files again.

The following table lists the practice files for this book.

Chapter	Folder	File
1: Get started with Visio 2016	Visio2016SBS\Ch01	ExploreDrawing.vsdx GetStarted.vsdx ManageShapesWindow.vsdx PanAndZoom.vsdx
2: Create diagrams	Visio2016SBS\Ch02	PositionShapes.vsdx ResizeShapes.vsdx SelectShapes.vsdx UseAutoAddAutoDelete.vsdx UseAutoConnect.vsdx UseDynamicConnectors.vsdx UseLines.vsdx
3: Manage text, shapes, and pages	None	None
4: Create business process diagrams	Visio2016SBS\Ch04	CreateSubprocesses.vsdx
5: Create organization charts	Visio2016SBS\Ch05	AlterLayout.vsdx OrgChartData.xlsx Photos folder with 27 images of people

Chapter	Folder	File
6: Add style, color, and themes	Visio2016SBS\Ch06	AlignSpaceShapes.vsdx
7: Create network and datacenter diagrams	Visio2016SBS\Ch07	ChangeDrawingScale.vsdx CreateRacks.vsdx
8: Work with shape data	Visio2016SBS\Ch08	CreateModifyReports.vsdx EditShapeData.vsdx InsertFields.vsdx ModifyDataAttributes.vsdx RunReports.vsdx Vegetation Report.vrd
9: Visualize your data	Visio2016SBS\Ch09	CreateDataGraphics.vsdx RiskManagementTaskMap.pdf
10: Link to external data	Visio2016SBS\Ch10	Photos\Oleg Anashkin.jpg OrgChartData.xlsx OrgChartData_Supplement1.xlsx UseQuickImport.vsdx UseCustomImport.vsdx
11: Add and use hyperlinks	Visio2016SBS\Ch11	EnhanceDiagrams.vsdx FollowHyperlinks.vsdx Human Resources Policy Manual.docx
12: Print, reuse, and share diagrams	Visio2016SBS\Ch12	CreateGraphics.vsdx CreateTemplates.vsdx PreviewDrawings.vsdx PublishToWeb.vsdx SaveInFormats.vsdx
13: Add structure to your diagrams	Visio2016SBS\Ch13	AnnotateShapes.vsdx OrganizeByContainers.vsdx OrganizeByLists.vsdx

Chapter	Folder	File
14: Validate diagrams	Visio2016SBS\Ch14	ReuseRules.vsd RuleSets--BPMN 2.0.html RuleSets--Cross-Functional Flowchart.html RuleSets--Flowchart.html RuleSets--SharePoint 2010 Workflow.html RuleSets--SharePoint 2016 Workflow.html ValidateBPMN.vsdx ValidateFlowcharts.vsdx ValidateSwimlanes.vsdx
15: Collaborate and publish diagrams	None	None
Appendix A: Look behind the curtain	Visio2016SBS\AppA	ViewShapeSheet.vsdx
Appendix B: Keyboard shortcuts for Visio	None	None

Ebook edition

If you're reading the ebook edition of this book, you can do the following:

- Search the full text
- Print
- Copy and paste

You can purchase and download the ebook edition from the Microsoft Press Store at *http://aka.ms/Visio2016sbs/details*.

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This topic provides information about getting help with this book and contacting us to provide feedback or report errors.

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We've made every effort to ensure the accuracy of this book and its companion content. If you discover an error, please submit it to us at *http://aka.ms/Visio2016sbs/errata*.

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Part 1

Create Visio diagrams

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Get started with Visio 2016

1

Microsoft Visio is the premiere application for creating business diagrams of all types, ranging from flowcharts, process maps and organization charts, to datacenter layouts, floor plans, and brainstorming diagrams.

Much more than just a diagramming app, Visio makes it easy to connect diagrams to live data sources, and then publish the results to Microsoft SharePoint to create near-real-time dashboards. On top of all that, you can use Visio to create a pattern for a quilt or to design a new kitchen for your house!

Visio 2016 includes many new features, including one that eliminates the curse of the blank page when you're starting a new diagram. Between that feature and the techniques you will discover in this chapter, you'll be off to a running start with Visio.

This chapter guides you through procedures related to getting started in Visio 2016, exploring the Backstage view, beginning quickly by using starter diagrams, exploring the drawing window, managing the Shapes window, and panning and zooming in the drawing window.

In this chapter

- Identify the editions of Visio 2016
- Discover new features in Visio 2016
- Get started in Visio 2016
- Explore the Backstage view
- Understand tool tabs and add-in tabs
- Begin quickly by using starter diagrams
- Explore the drawing window
- Manage the Shapes window
- Pan and zoom in the drawing window

Practice files

For this chapter, use the practice files from the Visio2016SBS\Ch01 folder. For practice file download instructions, see the introduction.

Identify the editions of Visio 2016

Visio 2016 is available in three editions. The first two editions use the traditional desktop purchase and installation model and mirror the two editions that were offered in most prior Visio releases. The third edition is part of the Microsoft Office 365 suite of subscription-based applications.

- **Visio Standard 2016** This is the starter edition of Visio. It provides significant capability for creating business diagrams and includes 26 templates that are divided into six categories.
- **Visio Professional 2016** This edition expands on the Standard edition by offering more than four dozen additional templates, for a total of 76 across eight categories. In addition, Visio Pro offers the ability to link diagrams to a wide variety of data sources, and includes a diagram validation capability that is especially well suited for the expanded set of business process diagrams it supports.
- **Visio Pro for Office 365** This edition of Visio provides the identical features and templates as Visio Professional 2016. The key differences in this edition are in packaging and delivery. As part of Office 365, there is no up-front license fee. Instead, you pay a monthly subscription fee and can install the software on up to five computers.

Discover new features in Visio 2016

Visio 2016 is sleek-looking, colorful, connected, portable, collaborative, and helps protect your document content.

The following list describes key new capabilities of Visio 2016:

- **Starter diagrams** Creating a diagram from a blank page can be daunting, especially if you're working with a new diagram type. Visio 2016 helps you get started more quickly by providing dozens of starter diagrams.

SEE ALSO For more information about starter diagrams, see "Begin quickly by using starter diagrams" later in this chapter.

- **Modernized shapes** Dozens of Visio shapes received makeovers for Visio 2016. The updated shapes look modern, as shown in the comparison of Visio 2013 furniture shapes, on the left in Figure 1-1, with the equivalent shapes from Visio 2016 on the right. In addition to changes in appearance, some new shapes exhibit smart behavior. For example, if you increase the length or width of the Visio 2016 table in Figure 1-1, additional chairs appear!

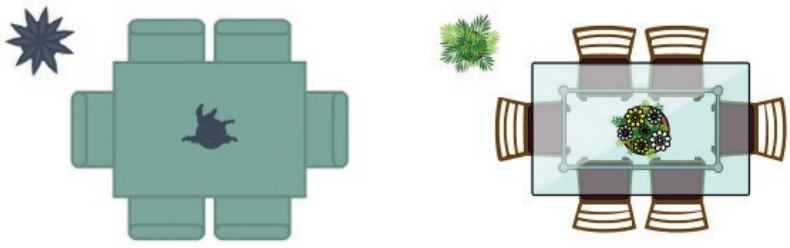

Figure 1-1 *Many Visio 2016 shapes have a fresh, new look*

You will find updated masters in stencils associated with templates for office layouts, site plans, floor plans, home plans, and electrical diagrams.

- **Tell Me** The Microsoft Office Tell Me feature makes finding any one of the 800 commands in Visio as easy as entering a word or phrase. Tell Visio what you want to do, and it responds with a list of executable commands.

  Some commands in the response list might be dimmed (unavailable) because the Tell Me feature is context-aware. For example, if you start entering the word *container* when a container is not selected, most commands are unavailable, as shown on the left in Figure 1-2. However, if a container is selected, additional commands are available, as shown on the right.

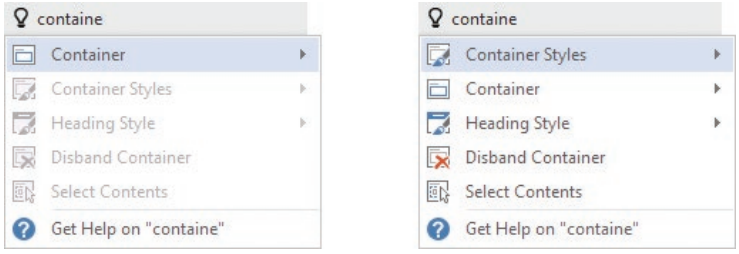

Figure 1-2 *Tell Me provides instant access to relevant commands*

- **Information Rights Management (IRM)** In Visio 2016, you can assign access rights so only authorized people can read or modify your diagram.

  SEE ALSO For more information about IRM, see the sidebar "What is Information Rights Management?" in Chapter 12, "Print, reuse, and share diagrams."

- **High-resolution device support** All buttons, menus, and features of Visio 2016 now operate properly on high-resolution displays like the Microsoft Surface.
- **Support for standards** Three types of diagrams included with Visio Professional 2016 have been updated to comply with the latest versions of the relevant international standards.
  - The Basic Electrical template in the Engineering template group complies with standards from the Institute for Electrical and Electronic Engineers (IEEE).
  - The BPMN Diagram template (available only in Visio Professional) in the Flowchart template group conforms to Business Process Model and Notation (BPMN) 2.0.

    SEE ALSO For more information about BPMN, see Chapter 4, "Create business process diagrams."

  - The six UML templates in the Software and Database template group comply with Unified Modeling Language (UML) 2.4.
- **Quick Import** The new Quick Import wizard (available only in Visio Professional) links a diagram to external data, links data to individual shapes, and then applies a data graphic to each shape—all in a single, seamless operation.

  SEE ALSO For more information about Quick Import, see Chapter 10, "Link to external data."

Get started in Visio 2016

The Visio Start screen is shown in Figure 1-3. In addition to a list of recently opened diagrams, the Start screen displays thumbnails of available templates.

TIP The New page of the Backstage view, which is shown in Figure 1-12 in the following topic, presents the same template options as the Start screen. When you first start Visio, you can create a diagram from the Start screen. If Visio is already running, you can create one from the New page.

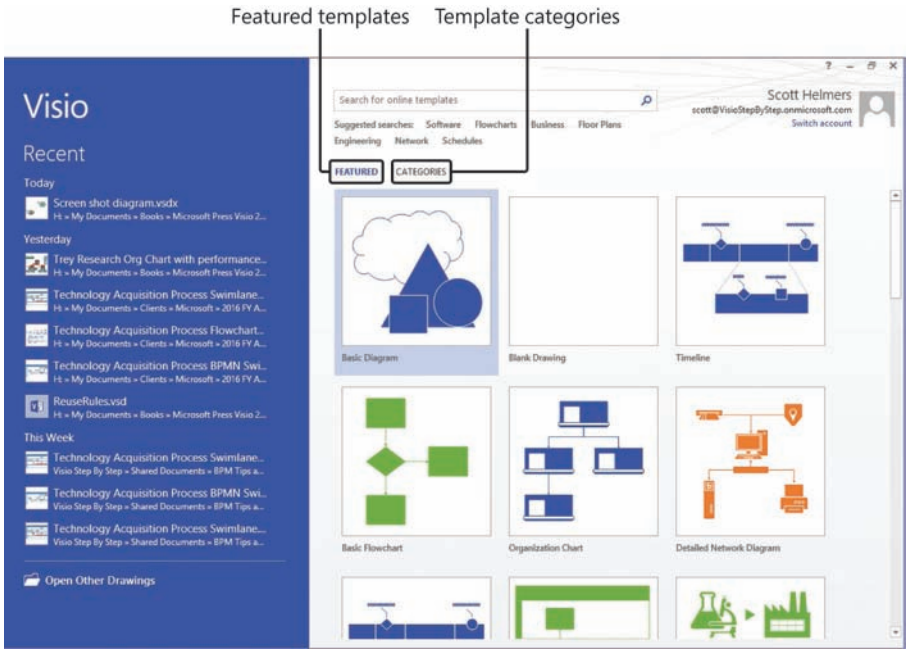

Figure 1-3 *Featured templates appear by default, but you can view template categories*

IMPORTANT The Start screen always displays featured templates first. It's easy to overlook the Categories button that presents a more traditional view of templates organized into logical groups.

Understand shapes, masters, stencils, and templates

Before you explore the rest of Visio, it's helpful to understand a number of commonly used terms:

- **Shape** An object on a Visio drawing page.

  A shape can be very simple, such as a line, a polygon, or an image. A shape can also be a sophisticated object that changes appearance or behavior as data values change, as its position on the page changes, or as properties of another shape change—the possibilities are endless.

  Usually, you create shapes by dragging a master from a stencil to the drawing page; however, you can create shapes in other ways. You will learn more about shapes in Chapter 2, "Create diagrams," and throughout this book.

- **Master** An object in a Visio stencil.

  Most people who create diagrams by using Visio use either the masters that ship with Visio or masters that they download from the Internet. You can also create your own masters, and you'll find enough information to get started in Appendix A, "Look behind the curtain."

- **Stencil** A collection of masters.

  Visio includes both metric and US unit versions of more than two hundred stencils. Each stencil contains several, or several dozen, related masters. Examples include stencils named Furniture, Transportation Shapes, Workflow Shapes, Network Locations, and Timeline Shapes. Appendix A, "Look behind the curtain," describes how to create a custom stencil.

- **Template** A Visio document that includes one or more drawing pages with preset dimensions and measurement units.

  A template generally contains one or more stencils, and it might include background pages, themes, shapes, or text. A template can include special software that only operates in that template.

- **Workspace** A collection of Visio windows and window settings.

  At minimum, the workspace consists of the drawing window and the zoom settings for the pages in the drawing. Frequently, it includes a Shapes window containing one or more stencils. The workspace can also include the Shape Data, Size & Position, and Pan & Zoom windows, in addition to template-specific windows.

  Unless you change the default action, Visio saves the on-screen workspace whenever you save a document. Consequently, the next time you open the document, Visio restores the workspace.

TIP Despite the distinction made in this list between a master and a shape, many people refer to an object in a stencil as a *shape*. Indeed, when you think about it, the window that displays stencils is called the Shapes window! Consequently, unless the distinction is important in a specific context, the text in this book will usually refer to objects in stencils and on the drawing page the same way—as shapes.

To begin a diagram based on an existing template, you can do any of the following:

- Search online for templates by entering keywords or by clicking any word in the Suggested Searches list.

  IMPORTANT Searching with a keyword will not produce the same result as selecting a template category that matches the keyword. For example, clicking the Flowchart search term yields some of the same templates that you find in the template category named Flowchart. However, it also returns a list of several—or several hundred—templates that is likely to include both Visio templates and templates for other apps in the Office suite.

- Use a template in the Featured section. The presentation of thumbnails in this section is dynamic: the templates you use most frequently rise to the top.

  TIP The Blank Drawing template shown in Figure 1-3 opens the drawing page but does not open any stencils.

- Use the Categories view to locate templates that are organized into groups. Visio Standard displays six categories: Business, Flowchart, General, Maps and Floor Plans, Network, and Schedule. Visio Professional adds two categories: Engineering, and Software and Database.

At the end of the template categories list is an additional entry called New From Existing, as shown in Figure 1-4. When you click this thumbnail, you can select any existing Visio diagram. Visio then opens a copy of the diagram as a new document and leaves the original untouched.

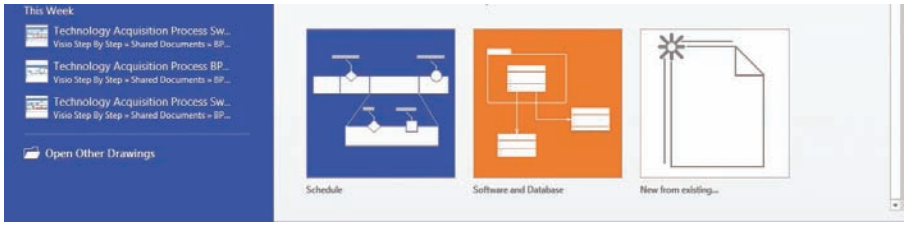

Figure 1-4 *The New From Existing button helps protect your diagram*

Clicking any template category displays thumbnails for the templates in that category. Figure 1-5 shows several of the templates in the Maps And Floor Plans category.

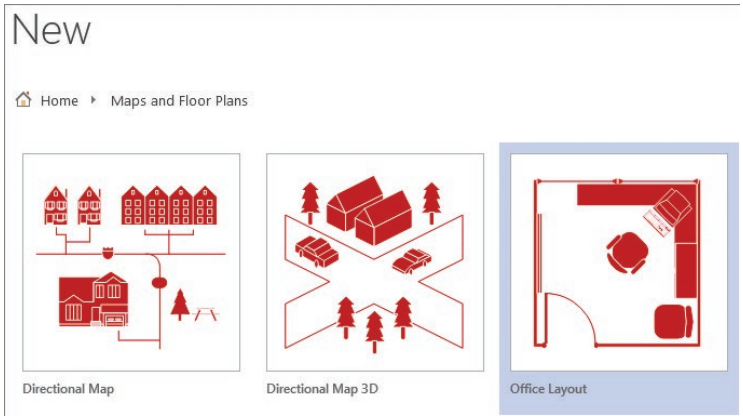

Figure 1-5 *Sample template thumbnails*

If you click once on a diagram thumbnail, Visio displays information about that template, as shown in Figure 1-6. If you double-click a diagram thumbnail, Visio launches a new diagram.

IMPORTANT Many Visio templates include starter diagrams that provide additional options for creating diagrams. See "Begin quickly by using starter diagrams" later in this chapter for more information.

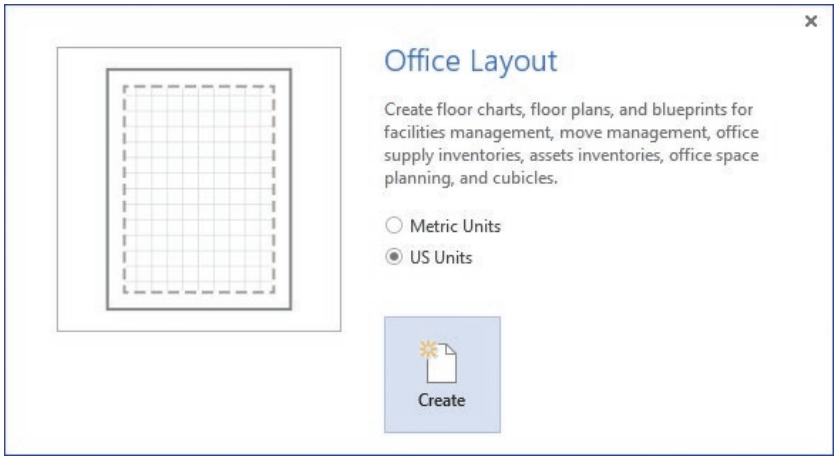

Figure 1-6 *The template information panel includes a description of the template*

TIP When you create a new diagram, Visio names it Drawing*n*, where *n* is a sequence number that is incremented for each new drawing created within one Visio session. Closing and restarting Visio always resets the sequence number to 1.

Visio templates are provided in two sets of measurement units:

- **Metric** Metric drawings are based on paper sizes specified by the International Organization for Standardization (ISO); the default size is usually A4. Metric templates also include other ISO drawing and paper sizes. All measurements are in millimeters or other metric measurement units.
- **US Units** Diagrams created with US Units use the 8.5-by-11-inch, letter-sized paper that is common in the United States and parts of Canada and Mexico. Templates created for US Units also include additional drawing and paper sizes that are common in those countries/regions. The default measurement units are inches and feet.

Depending on your system configuration, you might be offered a choice between the two, as shown in Figure 1-6.

SEE ALSO Microsoft provides a Quick Start guide for Visio 2013 (and other Office 2013 apps) at *office.microsoft.com/en-us/support/office-2013-quick-start-guides-HA103673669.aspx*. As of this writing, there is no Visio 2016 guide; however, the majority of the Visio 2013 guide is correct for Visio 2016.

To open a recently used diagram

1. In the **Recent** column on the **Start** screen of the Backstage view, click the name of the diagram you want to open.

To open a diagram that is not on the Recent list

1. In the **Recent** column, click **Open Other Diagrams**.
2. On the **Open** page of the Backstage view, click the location, and then open the diagram you want.

To use a Featured template

1. If the Featured tab is not already active, click the **Featured** button above the thumbnails on the **Start** screen.
2. Do either of the following:
   - Double-click a template thumbnail.
   - Click the thumbnail for the template you want, and then click the **Create** button.

To use template categories

1. If the Categories tab is not already active, click the **Categories** button above the thumbnails on the **Start** screen.
2. Click the thumbnail for the category you want.
3. Do either of the following:
   - Double-click a template thumbnail.
   - Click the thumbnail for the template you want, and then click the **Create** button.

To search for a template

1. On the **Start** screen, do either of the following:
   - Enter keywords in the **Search for online templates** box, and then press the **Enter** key.
   - Click one of the keywords in the **Suggested searches** list.

To use an existing diagram as a template

1. If the Categories tab is not already active, click the **Categories** button above the thumbnails on the **Start** screen.
2. Do either of the following:
   - Double-click the **New from existing** thumbnail.
   - Click the **New from existing** thumbnail, and then click the **Create** button.
3. In the **New From Existing Drawing** dialog box, navigate to, and then open the diagram you want.

Explore the Backstage view

The Backstage view is the central location for managing files and setting the options that control how Visio 2016 operates. You access the Backstage view by clicking the File tab on the left end of the ribbon in the Visio window.

Of the 11 commands in the left pane of the Backstage view, only four—New, Open, Account, and Options—are available if you do not have a diagram open. The remaining seven appear when you open a diagram.

TIP If you are in the Backstage view and have a diagram open, you can return to the diagram by clicking the left-pointing arrow in the upper-left corner of the Visio window. If you don't have a diagram open, clicking the arrow will return you to the Start screen.

Most of the commands and accompanying pages in the Backstage view will be familiar if you have used other apps in the Office suite. In this topic, you will explore the Backstage view, with an emphasis on features that are unique to Visio.

The Info page

When you have a diagram open and click the File tab, Visio presents the Info page shown in Figure 1-7.

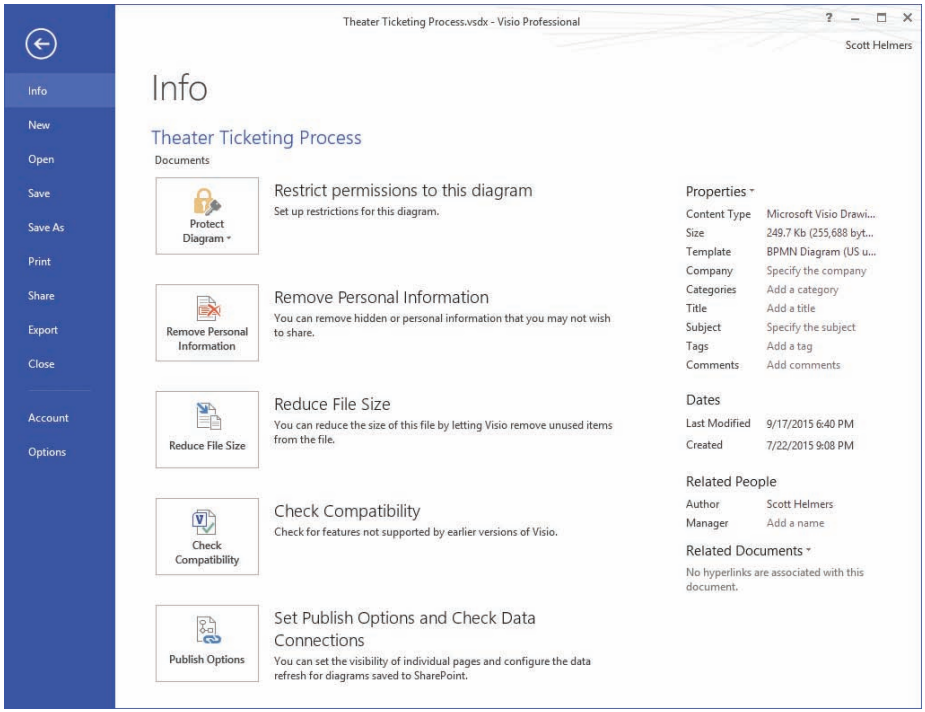

Figure 1-7 *You use the Info page to view and change document attributes*

The center section of the page includes five buttons:

- **Protect Diagram** You will explore this button in the sidebar "What is Information Rights Management?" in Chapter 12, "Print, reuse, and share diagrams."
- **Remove Personal Information** You will learn about this button in Chapter 12, "Print, reuse, and share diagrams."
- **Reduce File Size** You can click this button if document size is a major consideration and you want to create a smaller file.
- **Check Compatibility** This button identifies features in the current diagram that are not compatible with previous versions of Visio.
- **Publish Options** You will learn about the SharePoint publishing settings behind this button in Chapter 15, "Collaborate and publish diagrams."

The right side of the page provides information about the open document, along with a Properties list that you can use to view and set document attributes. You will work with the Properties list in several places in this book, including Chapter 11, "Add and use hyperlinks," and Chapter 12, "Print, reuse, and share diagrams."

The Info page can contain additional buttons, such as the following:

- If you open a document in read-only mode, the Save As button, shown in Figure 1-8, will appear at the top of the Info page.

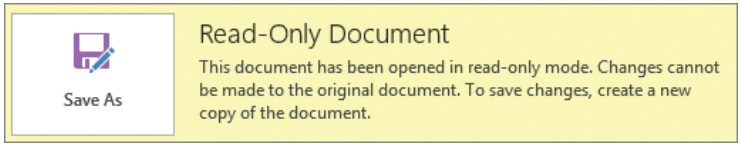

Figure 1-8 *Altered read-only documents must be saved as new documents*

- If you open a file created in Visio 2010 or earlier, it will open in compatibility mode, and the Convert button, shown in Figure 1-9, will appear at the top of the Info page.

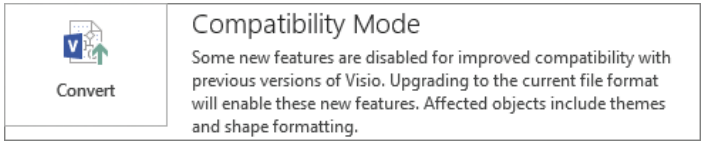

Figure 1-9 *You can upgrade older diagrams to the Visio 2016 format*

SEE ALSO For more information about current and former Visio file formats, see "Understand the Visio 2016 file formats" in Appendix A, "Look behind the curtain."

- When a document is stored in SharePoint or OneDrive, the Check Out and View Version History buttons, shown in Figure 1-10 and Figure 1-11, will appear.

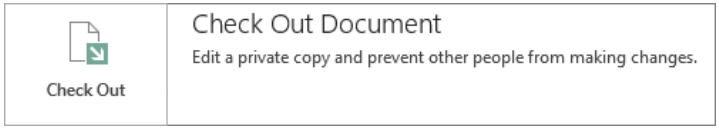

Figure 1-10 *You can protect documents from simultaneous edits by other authors*

As the description next to the button shown in Figure 1-10 suggests, you use the Check Out button to prevent others from making changes to a document you are editing. When you click the Check Out button, it is replaced by a Check In button that you use to mark the document as available.

You use the View Version History button to view and manage the current and previous versions of a document.

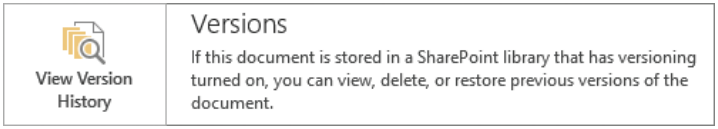

Figure 1-11 *SharePoint can track each time a document is saved*

The New page

The New page, the upper part of which appears in Figure 1-12, is very similar to the Start screen shown in Figure 1-3 in the preceding topic. On the New page, you have access to the same featured templates, template categories, and online template search options that were described for the Start screen.

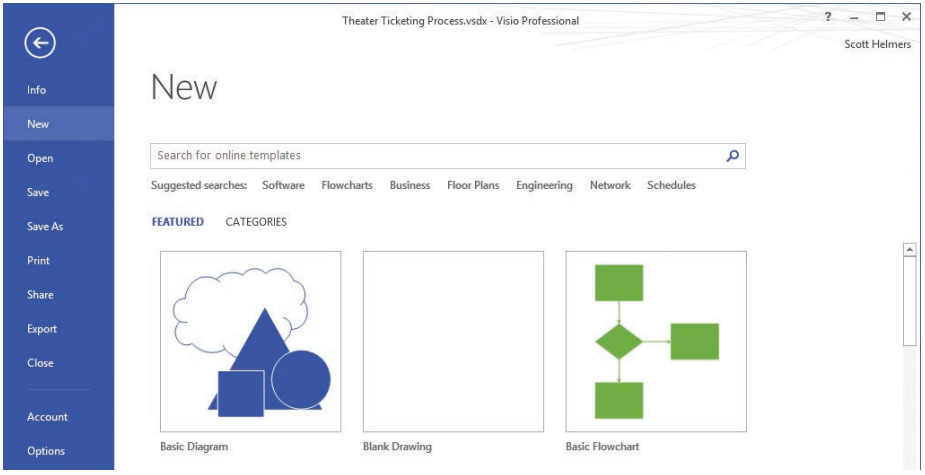

Figure 1-12 *The New page shows both featured and categorized templates*

IMPORTANT The New page always displays featured templates first. It's easy to overlook the Categories button that presents a more traditional view of templates organized into logical groups.

The Open page

As it does throughout the Microsoft Office suite, the Open page, shown in Figure 1-13, displays a list of both online and local locations where documents can be stored. You can click any location in the left column to see recently used diagrams stored in that location. You can also add more online locations to the list, or browse to locate the diagram you want.

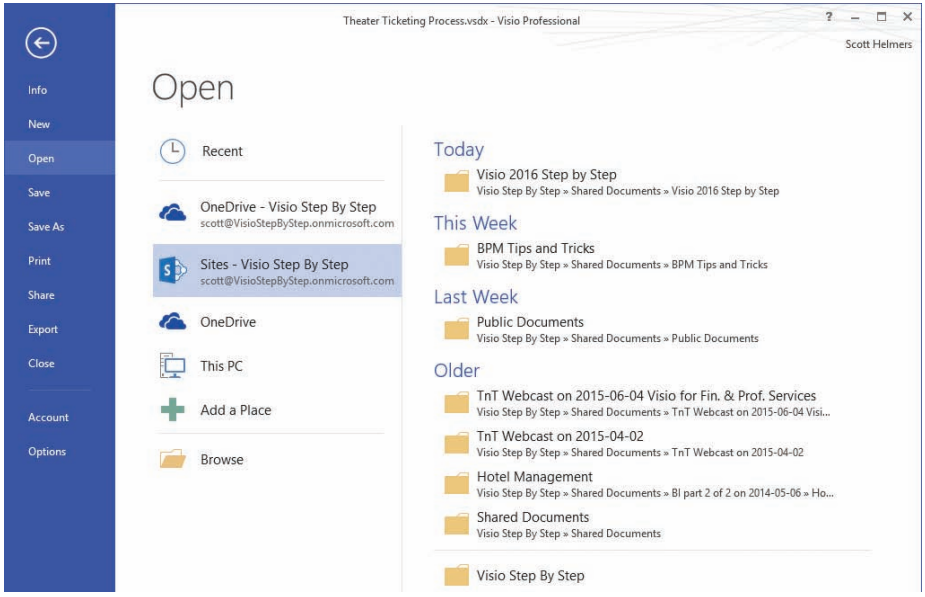

Figure 1-13 *Opening online documents is as easy as opening local documents*

The Save command

Clicking Save for an unsaved diagram displays the Save As page that is described in the following topic. Clicking Save for a previously saved diagram saves the changes.

The Save As page

On the Save As page, shown in Figure 1-14, you can choose a local or online location and then select a recent folder or click the Browse button to navigate to the location you want.

> **SEE ALSO** For information about storing Visio diagrams in other formats, see Chapter 12, "Print, reuse, and share diagrams" and Chapter 15, "Collaborate and publish diagrams."

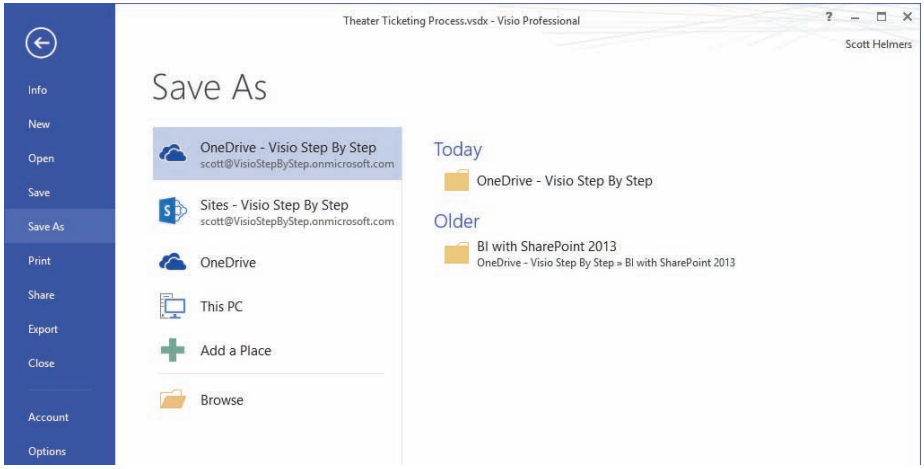

Figure 1-14 *You can save locally or to OneDrive and SharePoint sites*

The Print page

The Print page provides a print preview and printing options. You will explore print options in Chapter 12, "Print, reuse, and share diagrams."

The Share page

You can share your diagram two ways by using the Share page.

You can click Share With People to send people a link to your diagram via email. Your diagram must be stored in SharePoint or OneDrive to use the share function. If it is not, you will be asked to save it in one of those locations first, as shown in Figure 1-15.

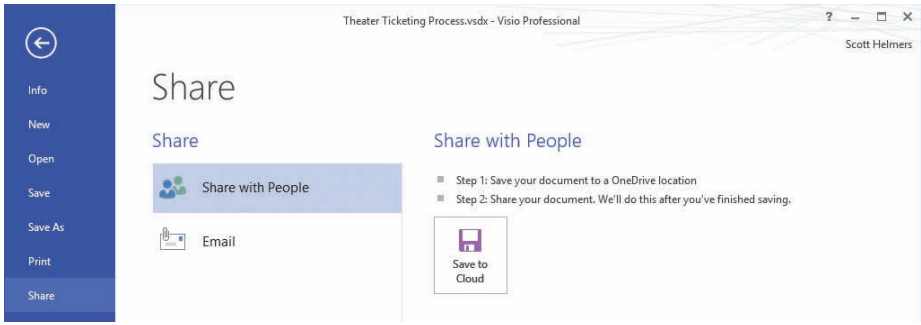

Figure 1-15 *Sharing diagrams with other people requires two steps*

After the diagram is available online, you can use the form shown in Figure 1-16 to send links to one or more people.

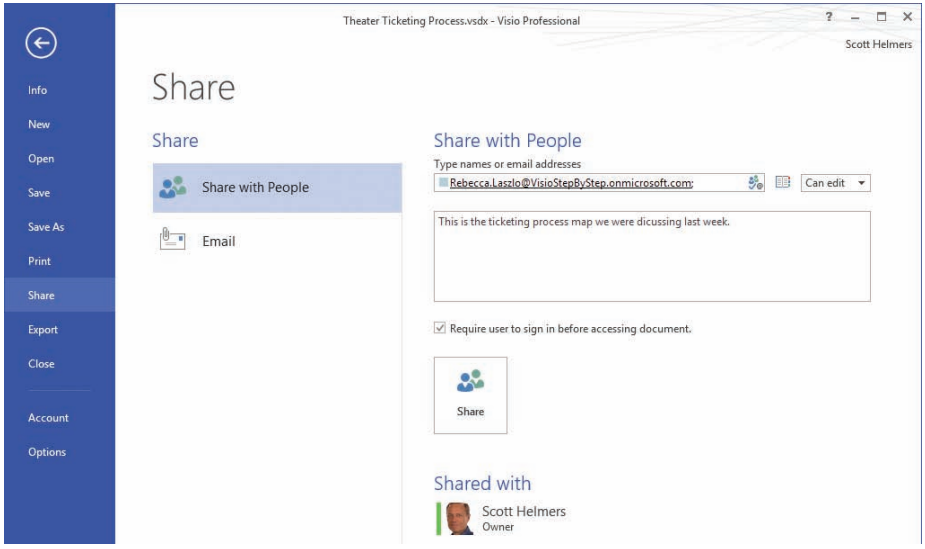

Figure 1-16 *You can enter one or more email addresses to share a diagram*

You can click the Email button to share your diagram using any of the options listed on the right side of the page shown in Figure 1-17.

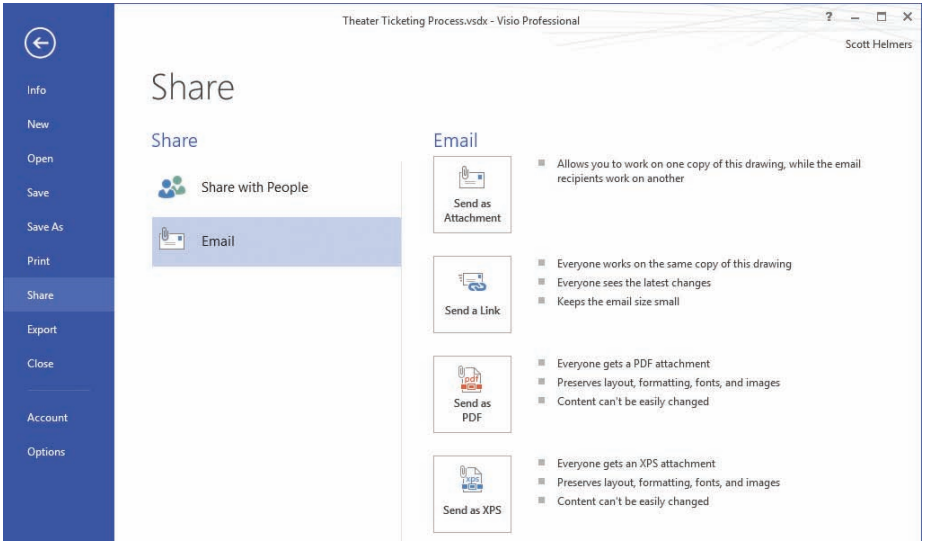

Figure 1-17 *One option for sharing by email automatically creates a PDF of your diagram*

TIP Send A Link is available only if your diagram is stored online or in a shared folder.

The Export page

You can use the Export page to create a PDF or XPS document and to save in a variety of other file formats. You will explore other file formats in Chapter 12, "Print, reuse, and share diagrams" and Chapter 15, "Collaborate and publish diagrams."

The Close command

Clicking Close closes the active diagram but does not exit Visio.

The Account page

The Account page, shown in Figure 1-18, summarizes information about the Microsoft Account that you have linked to Visio. You can click the links in the User Information area to change your Microsoft Account details and to switch to another Microsoft Account if you have more than one.

The same area provides lists you can use to alter the Office Background and Office Theme used for Visio and all other Office applications.

In the Connected Services area is a list of OneDrive and SharePoint sites to which you are currently connected. You can click the Add A Service button to link to additional OneDrive and SharePoint sites.

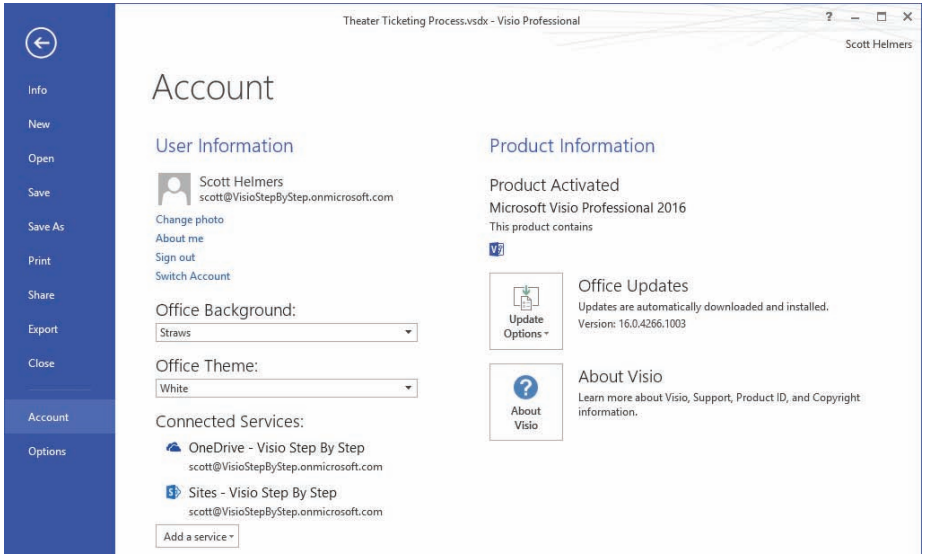

Figure 1-18 *Both user profile and application-level settings are on the Account page*

Clicking the About Visio button in the Product Information area opens the About Microsoft Visio dialog box (see Figure 1-19), which displays version information and your product ID.

TIP The About Microsoft Visio dialog box does not indicate whether you are running Visio Standard or Visio Professional; that information is located below the Product Activated heading in the Product Information area.

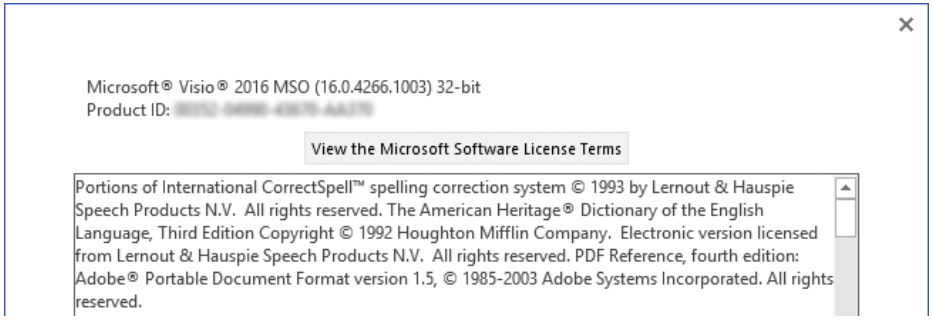

Figure 1-19 *The About Microsoft Visio dialog box displays important information*

The Visio Options dialog box

The Options button opens the Visio Options dialog box, which contains dozens of settings you can use to customize the operation of Visio. Many people use Visio without ever needing to change any of these options, but it's a good idea to examine the option categories shown in Figure 1-20 for potential future use.

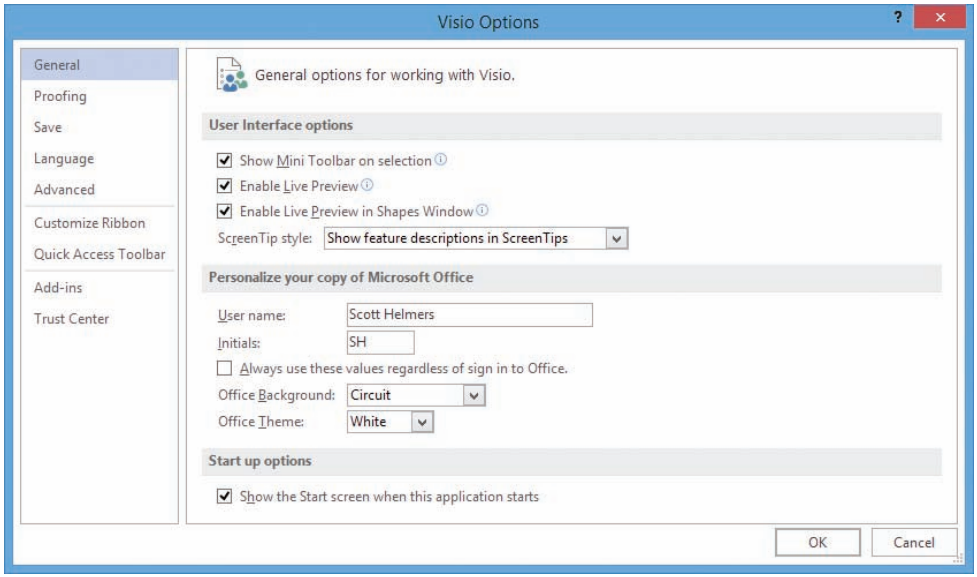

Figure 1-20 *There are dozens of ways to customize Visio*

You can use the options in the Visio Options dialog box to perform many actions, a few of which are mentioned in the following list:

- **General** Enter your user name and initials, and set various global options, including Live Preview and color choices for all Office apps.
- **Proofing** Set autocorrect, spelling, and grammar options.
- **Save** Enable AutoRecover, set the default Visio save format from among three choices (Visio Document, Visio Macro-Enabled Document, and Visio 2003-2010 Document), and set a personal templates location.
- **Language** Set editing, display, help, and ScreenTip language parameters.
- **Advanced** Set dozens of options in five categories: Editing, Display, Save/Open, Shape Search, and General.

- **Customize Ribbon** Add and rearrange commands on built-in ribbon tabs; create new tabs and commands.
- **Quick Access Toolbar** Add and remove command buttons for the Quick Access Toolbar.

> **SEE ALSO** For more information about customizing the Quick Access Toolbar, see Appendix A, "Look behind the curtain."

- **Add-ins** View, add, and delete Visio add-ins.
- **Trust Center** View and edit macro settings and other trust-related options.

To display the Backstage view

1. Click the **File** tab.

Understand tool tabs and add-in tabs

Most tabs on the Visio ribbon are visible 100 percent of the time. However, two types of tabs appear only when necessary.

> **SEE ALSO** For information about the Developer tab, which might not be visible in your copy of Visio, see Appendix A, "Look behind the curtain."

Use tool tabs

A tool tab group appears only in a particular drawing context, usually when a specific type of shape is selected on the drawing page. Tool tab groups usually appear to the right of the View tab and are not always activated automatically when they appear; that is, you might need to click the tab to view its contents. A tool tab group includes a colored header and might contain one or more tool tabs under the header.

For example, the Picture Tools tab group, shown in Figure 1-21, appears whenever you insert or select a graphic on a Visio drawing page. The green Picture Tools tab contains a Format tool tab that includes buttons to crop, rotate, and otherwise modify a picture.

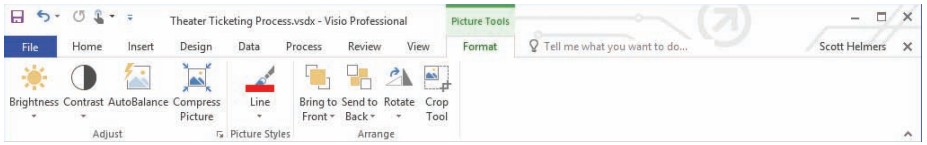

Figure 1-21 *You can use the Format tool tab in the Picture Tools tab group to edit images*

Another example, the Container Tools tab group, shown in Figure 1-22, appears whenever you insert or select a Visio container. The orange Container Tools tab group contains a Format tool tab, which includes buttons to size and style containers, and to control container membership.

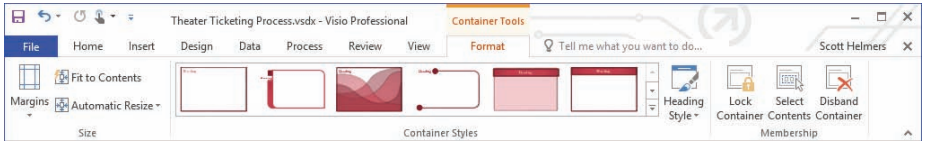

Figure 1-22 *You can use the Format tool tab in the Container Tools tab group to customize containers*

> **SEE ALSO** For more information about containers, see Chapter 13, "Add structure to your diagrams."

Use add-in tabs

Add-in tabs are associated with software that adds capabilities to Visio. Some add-ins are packaged with Visio by Microsoft, and others are sold by third-party software vendors.

Unlike tool tabs, add-in tabs look and behave exactly like permanent Visio tabs, with one exception: they appear when an add-in application is active and disappear when it is not.

For example, the Org Chart add-in is included with Visio and is activated whenever you create or edit a drawing that uses either of the Visio organization chart templates. The Org Chart add-in tab is shown in Figure 1-23.

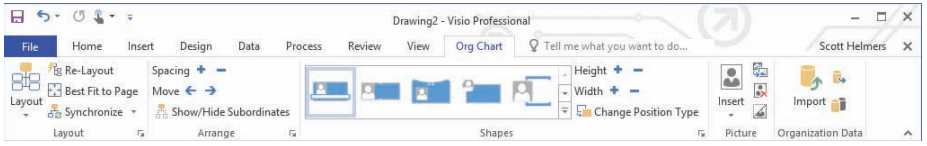

Figure 1-23 *You can change the look and layout of an organization chart by using the options on the Org Chart tab*

> **SEE ALSO** For more information about organization charts, see Chapter 5, "Create organization charts."

An example of a third-party add-in is TaskMap, which provides easy-to-use process mapping, analysis, and improvement functions. TaskMap can be used with either Visio Standard or Visio Professional. The TaskMap add-in tab is shown in Figure 1-24.

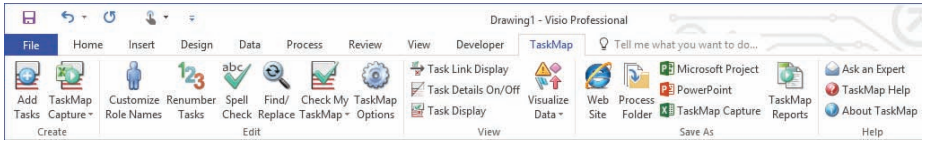

Figure 1-24 *The TaskMap add-in tab includes functions that integrate Visio with Microsoft Excel, Project, and PowerPoint*

> **SEE ALSO** For more information about the TaskMap add-in, go to *www.taskmap.com*.

Begin quickly by using starter diagrams

Visio templates have always included stencils full of shapes that you can use to build a new diagram. However, even when you use a template to create a diagram, the new drawing page is blank and it can be difficult to know how to begin.

Visio 2016 significantly reduces the challenge by providing several dozen starter diagrams, each of which includes a properly arranged and formatted set of shapes along with a set of tips.

Figure 1-25 shows an example of the starter diagrams that are provided with the Timeline template in the Schedule template group. You can click any of the starter diagram thumbnails to read a description of that sample diagram and the circumstances in which it might be useful.

In all cases, the blank page option is still available by selecting the thumbnail in the upper-left corner.

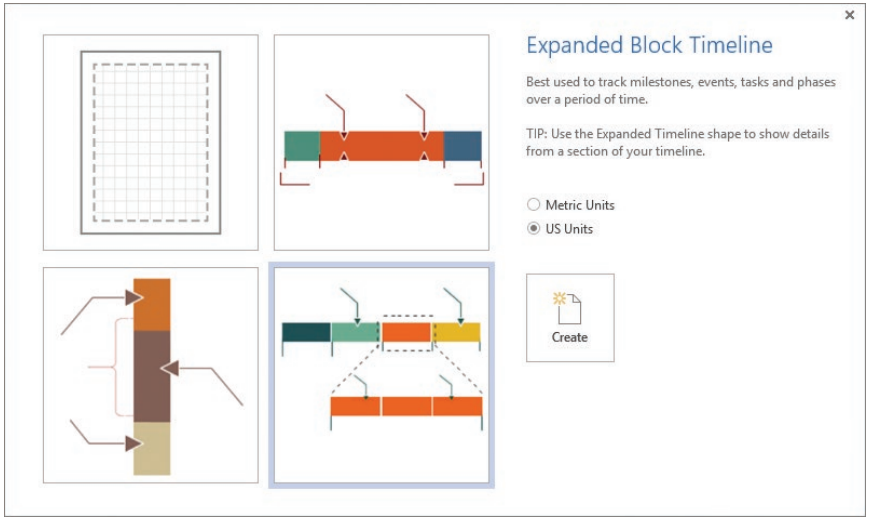

Figure 1-25 *Starter diagram thumbnails provide an accurate preview of diagram content*

Selecting one of the thumbnails opens a one-page document that includes the starter diagram. Figure 1-26 shows the Expanded Block Timeline diagram.

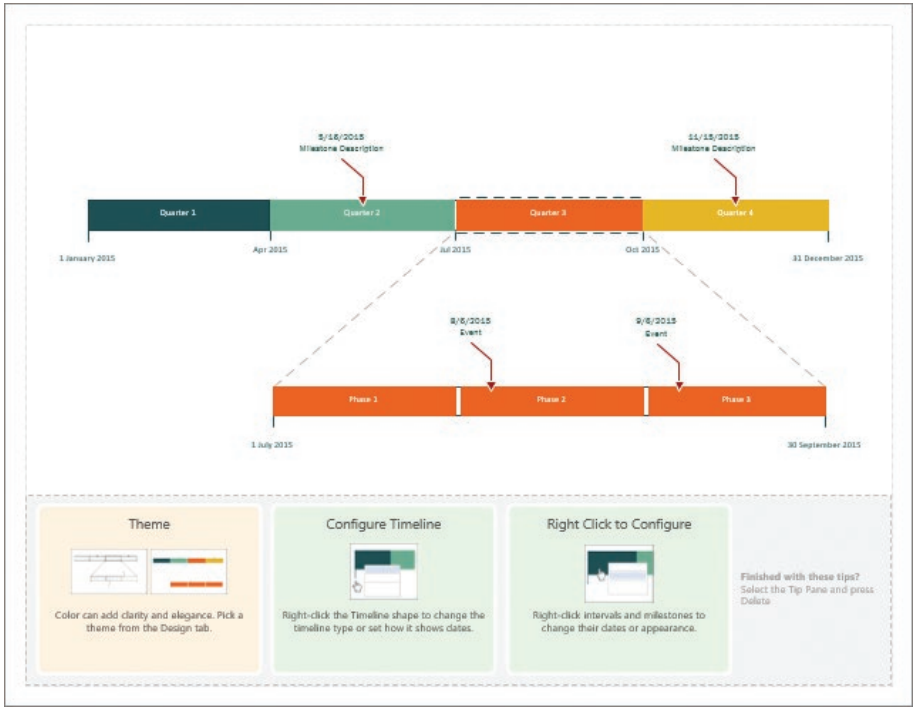

Figure 1-26 *The first page of the Expanded Block Timeline starter diagram*

In addition to the diagram itself, every starter diagram includes a tip pane that contains both general and domain-specific tips. When you are finished using the tips pane, you can delete it from the page.

Starter diagrams are available for these Visio Standard templates:

- Audit diagram
- Basic Flowchart
- Basic Network Diagram
- Cross-Functional Flowchart
- Gantt Chart
- Organization Chart Wizard
- Timeline
- Work Flow Diagram

In addition to those templates, the Professional edition of Visio includes starter drawings in these templates:

- BPMN Diagram
- Detailed Network Diagram
- Microsoft SharePoint 2016 Workflow
- UML Class
- UML Sequence
- UML Use Case
- Value Stream Map

To use a starter diagram

1. Click the thumbnail for any template.
2. In the template information panel, do either of the following:
    - Double-click the thumbnail of the starter diagram you want.
    - Click the thumbnail for the starter diagram you want, and then click the **Create** button.

To remove the tips pane from a starter diagram

1. Do either of the following:
   - Click anywhere inside the tips pane, and then press the **Delete** key.
   - Right-click the tips pane, and then click **Cut**.

Explore the drawing window

When you open a document in Visio, two windows normally appear below the ribbon, as shown in Figure 1-27.

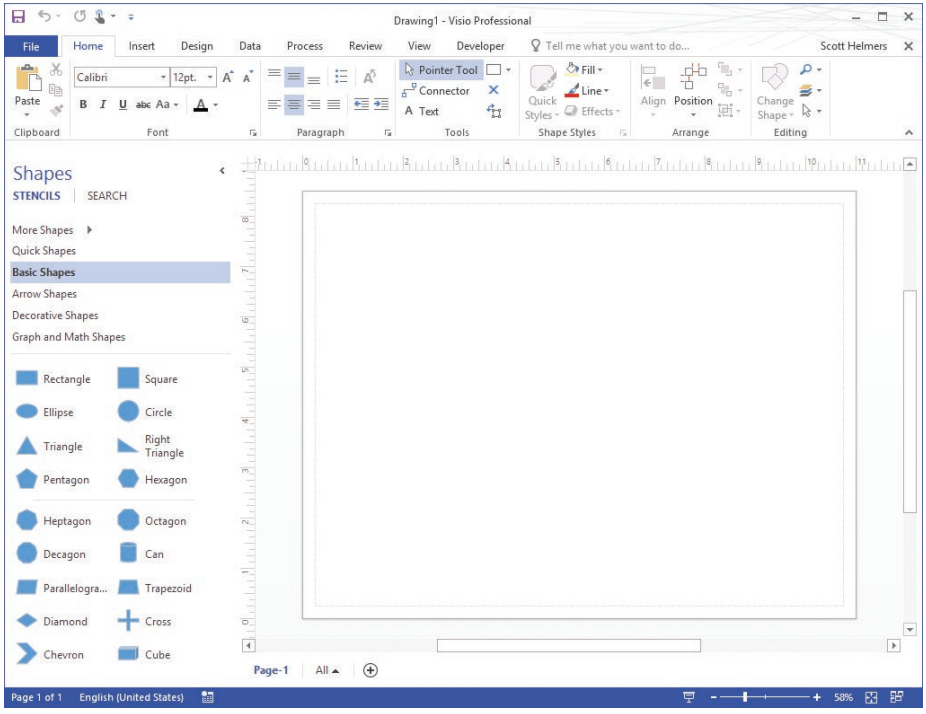

Figure 1-27 *A typical view of Visio includes the ribbon, the Shapes window, and the drawing window*

The Shapes window contains one or more stencils, each represented by a header bar containing the name of the stencil. Depending on the number of open stencils in the Shapes window, a scroll bar might appear at the right of the headers when you move the pointer into the Shapes window. You will investigate the Shapes window in the next topic.

TIP The width of the Shapes window is adjustable. Consequently, the Shapes windows on your computer might be narrower or wider than those that appear in this book.

The larger window on the right is called the *drawing window* because it contains the drawing page. The drawing window is bounded on the top and left by rulers that display inches, millimeters, or whatever units you've selected (or your template has selected) for measuring page dimensions. The gray area between the drawing page and the rulers is referred to as the *canvas*; shapes on the canvas are visible in the drawing window but do not print.

TIP All versions of Visio prior to Visio 2013 displayed an alignment grid on the drawing page by default. In Visio 2016, the opposite is true. To make the grid visible, select the Grid check box in the Show group on the View tab.

At the lower left of the drawing window is a set of page controls, as shown in Figure 1-28.

Figure 1-28 *Page controls are located at the bottom of the drawing window*

These controls provide the following functions:

- **Page Name tabs** These display the name of each page; the name of the active page is displayed in a different color. Click any tab to switch to that page. Right-click any page name tab to access page management functions, including the Duplicate Page function.
- **All Pages button** Click this button to display a list of all pages in the diagram. The name of the active page is highlighted in the list.
- **Insert Page (+) button** Click this button to add a new page.

Below the Shapes and drawing windows is a status bar that contains a variety of indicators, buttons, and controls. The buttons and indicators on the left end of the status bar are context sensitive, so they show different information depending on the state of the drawing.

If nothing is selected on the drawing page, the left end of the status bar looks like the image shown in Figure 1-29.

Figure 1-29 *The left end of the Visio status bar when no shape is selected*

These areas of the status bar provide the following functions:

- **Page Number** This shows which page is active and displays the total number of pages in the current drawing. Click this button to open the Page dialog box.
- **Language** This area displays the language of the current drawing. The drawing language is normally derived from Windows or Visio language settings.
- **Macros** Click this button to start the macro recorder.

If you have selected a shape on the drawing page, the left end of the status bar appears as shown in Figure 1-30.

Figure 1-30 *The left end of the Visio status bar when a shape is selected*

The Width and Height buttons display the dimensions of the selected shape. The Angle button displays its angle of rotation. Clicking any of these three buttons opens the Size & Position window.

SEE ALSO For information about using the Size & Position window, see Chapter 3, "Manage text, shapes, and pages."

The right end of the status bar, shown in Figure 1-31, contains buttons and controls that affect the view of your diagram.

Figure 1-31 *Zoom and window control functions are located on the status bar*

- **Presentation Mode button** Click this to view the active diagram in full-screen presentation mode.
- **Zoom slider** Move this to zoom in or out.

- **Zoom Level button** This displays the current zoom percentage. Click it to open the Zoom dialog box.
- **Fit Page To Current Window button** Click this to resize the drawing page so the entire page is visible in the drawing window.
- **Switch Windows button** Click this to switch to another Visio window.

> **TIP** Most Office applications require the use of a button on the View tab of the ribbon to switch among multiple open windows. The Visio development team had the foresight to include the Switch Windows button on the status bar where it is much more convenient.

If you right-click anywhere in the status bar, the Customize Status Bar menu appears. You can use this menu to turn on or off the display of any of the buttons and controls on the status bar.

To view a list of all pages in a diagram

1. Do either of the following:
   - To the right of the last visible page name tab, click the **All Pages** button.
   - At the left end of the status bar, click the **Page Number** button.

To view a different page

1. Do either of the following:
   - Click the page name tab for the page you want.
   - Open the list of all pages, and then select the name of the page you want.

To switch windows

1. Do either of the following:
   - On the right end of the status bar, click the **Switch Windows** button.
   - On the **View** tab, in the **Window** group, click the **Switch Windows** button, and then click the name of the window you want.

How do I scroll through page name tabs?

Versions of Visio prior to Visio 2013 included four page navigation buttons in the lower-left corner of the drawing window that you could use to scroll through the pages in your diagram. Two of the buttons scrolled page name tabs left and right, and two jumped to the first or last page. The navigation buttons were especially helpful when the number of pages or the length of the page names meant that some page names were not visible.

Although those controls are not present in Visio 2016, there is an invisible button that you can use to scroll pages from left to right—to use it, click in the space immediately to the left of the first visible page name tab. You can scroll pages in the opposite direction by clicking the right-most visible page name tab.

Unfortunately, there are no buttons you can use to jump to the first or last page with a single click. However, you can jump to any specific page, whether or not its name tab is visible, by using the techniques described in the procedures at the end of the preceding topic. As an example, clicking the All Pages button results in a clickable list of page names, as shown in Figure 1-32.

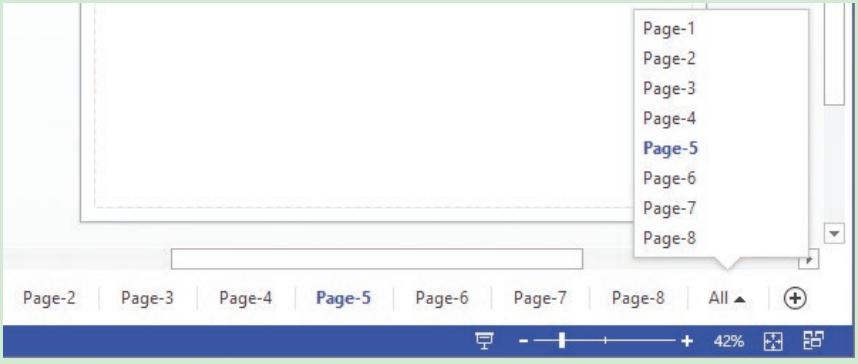

Figure 1-32 *The color of the current page name is different from all other page names*

Two keyboard shortcuts are very helpful for moving from page to page:

- **Ctrl+Page Down** Move one page to the right.
- **Ctrl+Page Up** Move one page to the left.

Manage the Shapes window

The upper part of the Shapes window contains the title bars of all open stencils, and the lower part displays the shapes from the currently selected stencil, as shown in Figure 1-27 in the preceding topic. You can switch to any open stencil by clicking its title bar. When you click the title bar of any stencil, the title bars remain stationary, and the stencil always opens in the same place, below all title bars. This is a significant improvement in behavior over versions of Visio prior to Visio 2010.

By default, the Shapes window is docked to the left of the drawing window, and it usually displays one or two columns of masters. However, you might find that you want to adjust or reposition the Shapes window, depending on the diagram you are creating or editing.

You can minimize or expand the Shapes window by using arrow buttons. The minimize button is shown on the left in Figure 1-33, and the expand button is shown in the image on the right. The minimized view of the Shapes window is most useful when the icons depicting the masters in the stencil are easily recognizable.

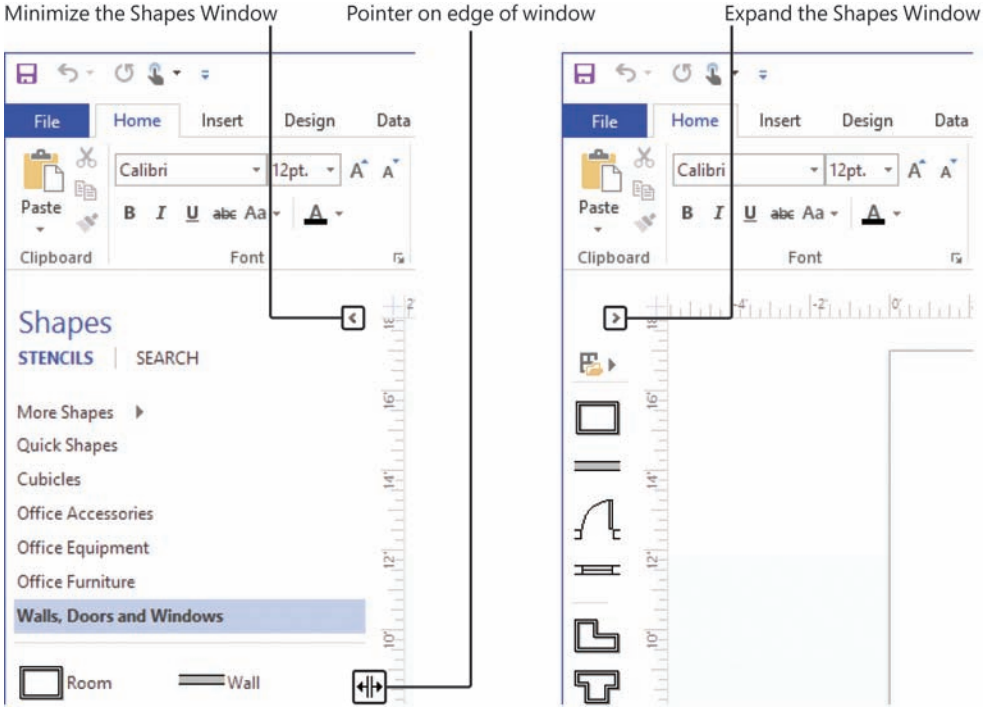

Figure 1-33 *You can view as little or as much of the Shapes window as you want*

You can undock and float the Shapes window at any time if you would like it to be in a different position within the main Visio window. You can also close the Shapes window entirely, as shown in Figure 1-34.

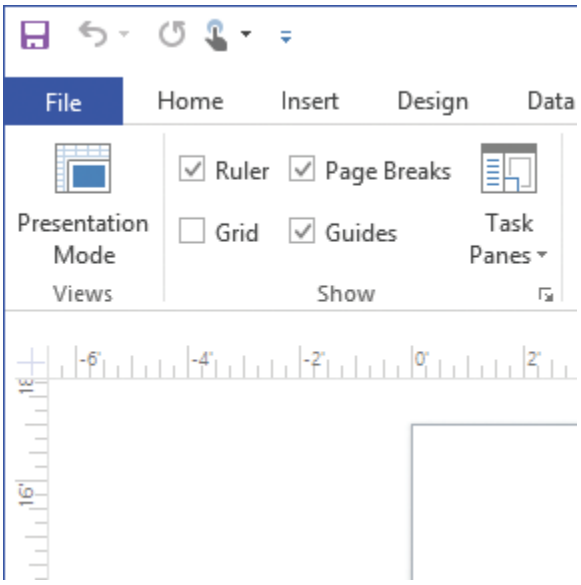

Figure 1-34 *The Shapes window has been hidden*

You can adjust the width of the Shapes window one column at a time by dragging the right edge of the window. However, it's not as easy to locate the right edge as it used to be. A user interface change introduced in Visio 2013 causes window edges to fade into the background so they don't interfere visually with the content of the drawing. Consequently, when the Shapes window is docked on the left, the right edge is not visible unless the pointer is positioned directly above it.

Making the boundary visible typically requires moving the pointer slowly across the right side of the window until the pointer changes to a window resize tool. The resize tool is visible in the image on the left in Figure 1-33.

This same user interface change means that scroll bars in smaller windows only appear when the pointer is inside the window. This creates a challenge in the Shapes window because you can't determine whether additional masters are below the bottom edge of the window without pointing to the window. In the image on the left

in Figure 1-35, for example, you can't tell that there are additional furniture shapes available. The scroll bar makes their presence known when the pointer is inside the window, as shown in the image on the right.

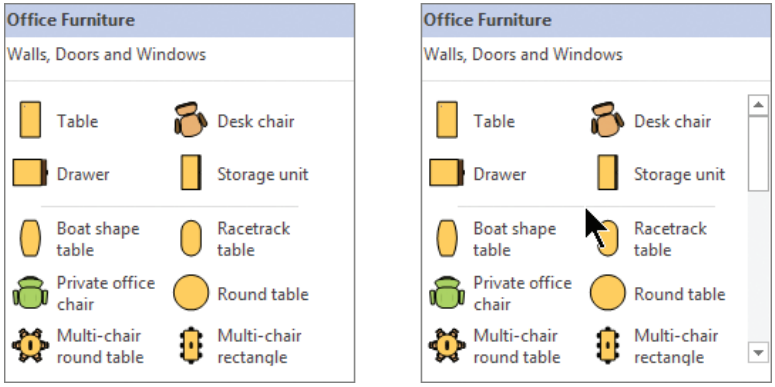

Figure 1-35 *The pointer must be inside a window for scroll bars to appear*

You are not restricted to working with the default set of stencils that opens in any particular template. You can open one or more additional stencils at any time, as shown in Figure 1-36.

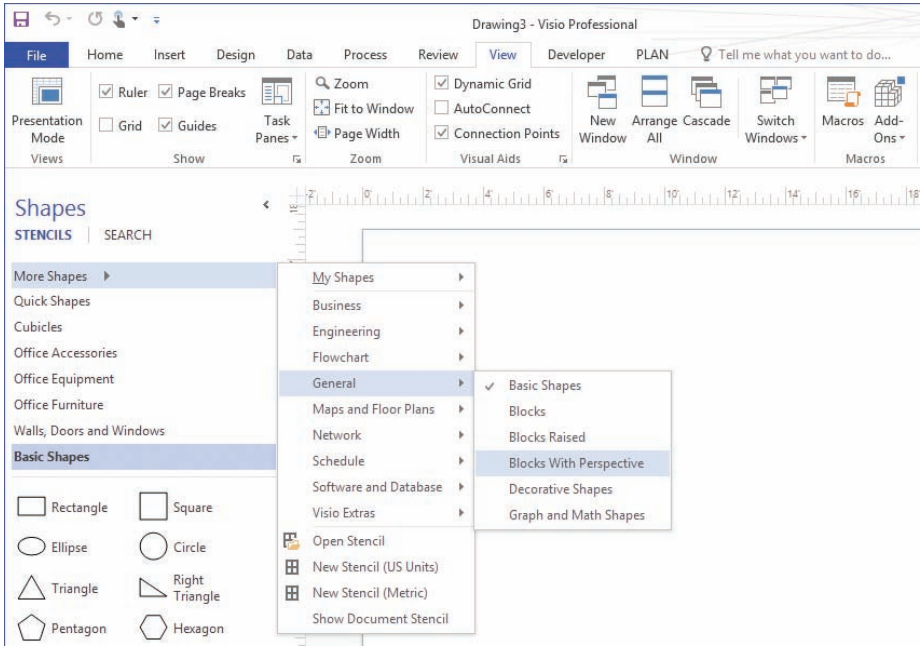

Figure 1-36 *Cascading menus offer access to all Visio stencils*

To minimize the Shapes window

1. Click the **Minimize the Shapes Window** button.

To expand the Shapes window

1. Click the **Expand the Shapes Window** button.

To adjust the width of the Shapes window

1. Move the pointer in the right side of the **Shapes** window until it changes to a window resize tool.
2. Drag the window edge to the left or right.

To undock the Shapes window

1. Drag the header of the window onto the drawing page.

To dock the Shapes window

1. Drag the header of the window to one of the four edges of the main Visio window.

To open or close the Shapes window

1. On the **View** tab, in the **Show** group, click the **Task Panes** button, and then click **Shapes**.

TIP The various subwindows that can be opened or closed within the main Visio window are sometimes referred to as *task panes*.

To open additional stencils

1. In the **Shapes** window, click **More Shapes**.
2. In the list of template category names, point to the name of the template you want.
3. In the list of stencil names, click the name of the stencil you want.

TIP The stencil opens in the Shape window as soon as you click its name.

4. (*Optional*) Click additional stencil names, within either the same template category or a different one.
5. Click anywhere outside the template and stencil lists to close the cascading menus.

Pan and zoom in the drawing window

As you work with Visio diagrams, you frequently need to zoom in and out and pan—move left-right and up-down—within the drawing window. Both can be accomplished by using a variety of techniques, some that rely on your mouse, some that use a special Pan & Zoom window, and others that entail keyboard shortcuts.

The pan and zoom examples in this topic all use the furniture diagram shown in Figure 1-37.

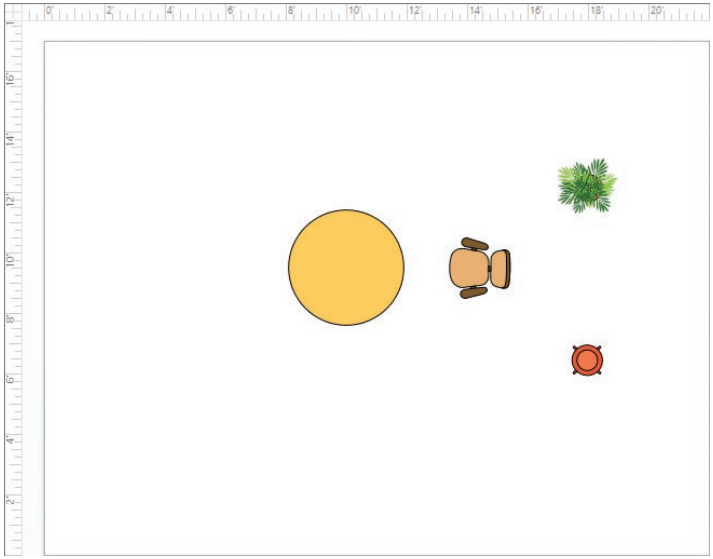

Figure 1-37 *Four furniture shapes in a full-page view*

One of the fastest techniques to view exactly the part of the page you want involves drawing a bounding box while holding down the Ctrl and Shift keys. While you draw the bounding box, Visio displays what's shown in Figure 1-38.