

## MICROSOFT VISIO 2010

### INTRODUCTION

The first thing that will confront most users of Visio 2010 is the new “Fluent” interface, and in particular the ribbon. For anyone migrating from an earlier version of Visio without the benefit of having used another Office 2007 product, the learning curve will seem steep indeed.

In Office 2010 the look and feel of the Fluent interface is clean and soothing on the eye, with a pale grey color scheme to the ribbon and a slight drop shadow around the page, and this look is consistent across the whole suite of programs. Whereas some components of Office 2007 were given the Ribbon and others were not, all the components of Office 2010 now use this new interface including Outlook, Project and, of course, Visio.

### DATA-CONNECTED VISIO DIAGRAMS

Instead of static pictures, you can create data-connected Visio Professional 2010 and Visio Premium 2010 diagrams that display data, are easy to refresh, and dramatically increase your productivity. You can use the wide variety of diagram templates and stencils in Visio to understand, act on, and share information about organizational systems, resources, and processes throughout your enterprise.

You can integrate data to shapes from a variety of real-time data sources, including Excel, Access, SQL, SharePoint lists, or any OLEDB or ODBC data source, with just a few clicks in a Data Wizard.

### FIND AND APPLY A TEMPLATE

Visio 2010 allows you to apply built-in templates, to apply your own custom templates, and to search from a variety of templates available on Office.com. Office.com provides a wide selection of popular Excel templates, including process diagrams, network diagrams, and floor plans.

**To find and apply a template in Visio:**

1. On the **File** tab, click **New**.
2. Under **Choose a Template**, do one of the following:
  - To use one of the built-in templates, under **Template Categories**, click the category that you want, and then click the template that you want and click **Create**.
  - To reuse a template that you have recently used, under **Recently Used Templates**, click the template that you want and then click **Create**.
  - To use your own template that you previously created, under **Other Ways to Get Started**, click **New from existing**, navigate to the file that you want and click **Create New**.
  - To find a template on Office.com, under **Other Ways to Get Started**, click **Office.com templates**, select the template that you want, and then click **Download** to download the template from Office.com to your computer.

You can also search for templates on Office.com from within Visio. To search for templates on Office.com, under **Other Ways to Get Started**, click **Office.com templates**. In the **Search Office.com for templates** box, type one or more search terms, and then click the arrow button to search.

**To create a new diagram:**

1. Click the **File** tab. This opens up the Backstage view.
2. You are in the Backstage view when you first open Visio. If you have just opened Visio, proceed to the next step.
3. Click **New**.
4. Under **Choose a Template**, below **Other Ways to Get Started**, click **Blank drawing**.
5. Click **Create**.

When the diagram template opens, a blank diagramming page takes up most of the space. Along the side is the **Shapes** window, which contains several stencils full of shapes.

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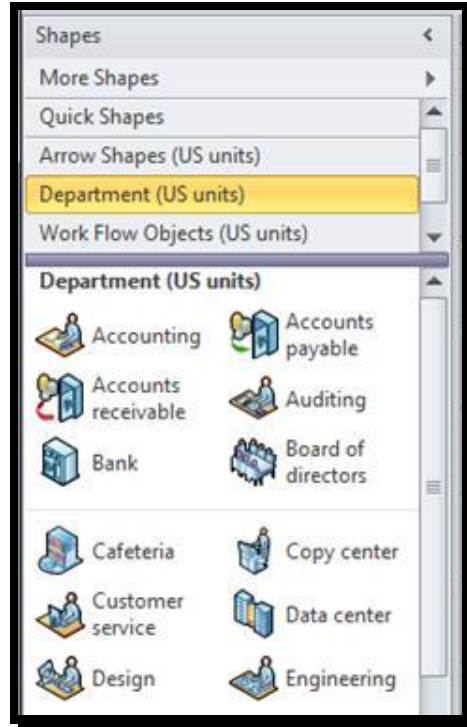


Figure 1. Shapes Window displays stencils available based on the selected template.

Title bars at the top of the Shapes window identify the stencils; you might need to scroll the title bar pane to see them all. When you click a stencil title bar, the shapes appear in the pane below.

***To open a diagram:***

1. Click the **File** tab, and then click **Open**.
2. In the left pane of the **Open** dialog box, click the drive or folder that contains the drawing.
3. In the right pane of the **Open** dialog box, open the folder that contains the drawing that you want.
4. Click the drawing and then click **Open**.

## SAVE A DIAGRAM

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

### *To save a Visio diagram:*

1. Click the **File** tab.
2. Click **Save As**, and then select a format in the **Save as type** list.
  - ◆ Different formats are available for using or sharing your diagram.
    - **Standard image file** include JPG, PNG, and BMP formats.
    - **Web page** in HTM format. Visio will save image files and other resource files in a subfolder of the location where you save the HTM file.
    - **PDF or XPS** file.
    - **AutoCAD drawing** in DWG or DXF format.

### *To add a shape:*

1. From the **Shapes** window, click and hold the shape that you want.
2. Drag the shape onto the diagram page.

### *To add a shape to automatically connect to another shape on the drawing page, do the following:*

1. Drag a first shape onto the drawing page.
2. Hold your pointer over the shape that is already on the page.
3. The shape with the **AutoConnect** arrows will appear.
4. Move the pointer to cover one of the arrows.
5. A mini toolbar that contains four shapes appears, and a preview shape might appear on the page.
6. As you move the pointer over the shapes in the mini toolbar, previews of the shapes appear. The shapes on the toolbar are the top four shapes from the **Quick Shapes** area.
7. Click one of the shapes in the mini toolbar to add it to the page.

To demonstrate this process, we created a *Workflow Diagram* and added the *Service Request* shape. Notice that small blue *AutoConnect* arrows appear on the four sides of the *Service Request* shape.

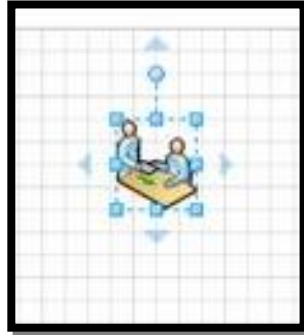


Figure 2. These are *AutoConnect* arrows that you can use to connect shapes.

*To automatically connect two shapes when you drag the second shape onto the page:*

1. Drag one shape onto the drawing page.
2. Drag a second shape onto the drawing page and hold it so it covers the first shape, but do not drop it yet. Notice that the *AutoConnect* arrows appear.
3. Move the second shape down over the *AutoConnect* arrow that points in the direction that you want, and drop it on the arrow.

To demonstrate this process, we dragged the **Analyze** shape to the bottom *AutoConnect* arrow of the **Service Request** shape. When we released the mouse, the **Analyze** shape was spaced a standard distance from the **Service Request** shape, and connected automatically.



Figure 4. Drag the second shape to the bottom *AutoConnect* arrow of the first shape.

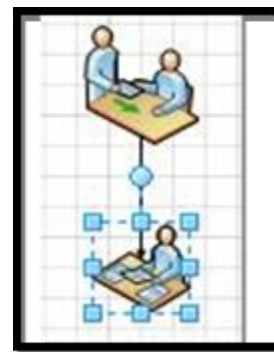


Figure 4. Release the mouse to observe second shape now positioned a standard distance from the first shape.

**To connect two shapes that are already on the page:**

1. Hold the pointer over one of the shapes that you want to connect.
2. When the **AutoConnect** arrows appear, move the pointer over an arrow that is pointing toward the shape that you want to connect.
3. Click and hold the **AutoConnect** arrow, and then drag a connector from it to the center of the other shape.
4. When the arrow is over the center of the other shape, a red border appears around the shape.
5. Drop the connector to attach it, or "glue" it, to the shape.

**ADDING TEXT TO SHAPES OR TO THE PAGE**

**To add text to a shape:**

1. Select the shape that you want to add text to.
2. Type the text that you want.
3. When you start typing, Visio switches the selected shape to text editing mode. To add another line of text, press ENTER.
4. Click an empty area of the page, or press ESC when you are finished.
5. Select the shape again. A small yellow control handle appears in the text area.
6. Drag the yellow control handle to move the text.

**To add text to the page:**

1. On the **Home** tab, in the **Tools** group, click the **Text** tool.
2. Click an empty area of the page. A text box appears.
3. Type the text that you want.
4. On the **Home** tab, in the **Tools** group, click **Pointer Tool** to stop using the **Text** tool.

The text box now has the characteristics of other shapes. You can select it and type to change the text, you can drag it to another part of the page, and you can format the text by using the **Font** and **Paragraph** groups on the **Home** tab.

In addition, when you hold the pointer over the text, **AutoConnect** arrows appear so you can connect the text to other shapes.

To enter data into a data property or field that a shape already has, do the following:

**To add data to a shape:**

1. Select a shape on the drawing page.
2. Right-click the shape and click **Shape Data**.
3. In the **Shape Data** window, in the property row that you want, enter the data that you want.

**To define a new data property or field for a shape:**

1. Select a shape on the drawing page.
2. Right-click the shape and click **Define Shape Data**.
3. In the **Define Shape Data** dialog box, click **New**.
4. In the **Label** box, delete the default text and type a name for the property.
5. In the **Type** list, select the type of data that you want to enter into that property.
6. **TIP** If you want the property to accept text (like a person's name) as the type of data, select **String**.
7. In the **Value** box, type the value of the data that you want.
8. Click **OK**.
9. Right-click the shape again, point to **Data**, and this time click **Shape Data**.

The **Shape Data** window opens and displays all the data defined for the shape. If all of the shapes have specific information, you can leave the **Shape Data** window open and click the shapes you are interested in to see the data they contain.

## CONNECT DATA SOURCES TO SHAPES

Adding shape data manually can add a lot of value to your diagram, but if your data is in a database or an Excel workbook, you can pull that data into your diagram automatically and connect the rows of data with specific shapes. Use the **Data Selector** wizard to import your data into the **External Data** window.

The data that appears in the **External Data** window is a snapshot of your source data at the time of import. You can update the data in your drawing to match the changes in your source data by clicking **Refresh All** on the **Data** tab.

***To connect data sources to shapes:***

1. On the **Data** tab, in the **External Data** group, click **Link Data to Shapes**.
2. On the first page of the **Data Selector** wizard, choose which of the following types of data sources have the data you're using:
  - Microsoft Office Excel workbook
  - Microsoft Office Access database
  - Microsoft Windows SharePoint Services list
  - Microsoft SQL Server database
  - Other OLEDB or ODBC data source
3. Complete the remainder of the wizard.

After you click **Finish** on the last page of the **Data Connection** wizard, the **External Data** window appears with your imported data shown in a grid. Drag a row of data onto a shape to add automatically the data to the **Shape Data** for that shape. Alternatively, in the **Shapes** window, select a shape that you want to hold the data, and then drag a row of data and drop it on an empty area of the page. You have now added the selected shape to the page and connected to the data.

**FORMATTING YOUR DIAGRAM**

***To apply a background to your drawing, do the following:***

1. Click the **Design** tab.
2. In the **Backgrounds** group, click **Backgrounds**.
3. Click the background that you want.

You will see a new background page added to the diagram along with the new background page tab along the bottom of the diagramming area.

***To apply a border or title to your drawing:***

1. On the **Design** tab, click **Borders & Titles**.
2. Click the title that you want.

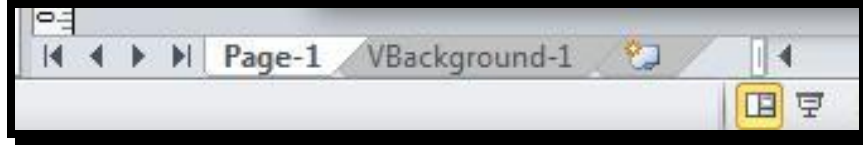
Visio adds the title and border to the background page (named **VBackground-1** by default).



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3. *To change the title and other text, you must make the changes on the background page; you cannot change the title on any other pages.*
4. *At the bottom of the diagramming area, click the VBackground-1 tab.*



**Figure 5. Tabs at the bottom of the Diagram page.**

5. *Click the title text. Notice clicking the title text selects the entire border. Once you start typing, the default title text changes.*
6. *Enter the title that you want.*
7. *To edit other text in the border, first select the entire border, and then click the text you want to change and start typing.*

**To apply a unified color scheme and other formatting effects:**

1. *On the **Design** tab, in the **Themes** group, hold your pointer over the various themes. A preview of the theme shows up on the page.*
2. *To see other available themes, click **More** .*
3. *Click the theme you want to apply to the diagram.*

**To print your diagram:**

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