Process Flow - All Stencils Template

The Process Flow - All Stencils Template includes instrumentation, vessel, equipment, heat equipment, and pump and compressor shapes for use in creating process flow diagrams.

For information about how a particular shape behaves, right-click the shape, then choose Shape Help.

Setting up your drawing page

By default, the Process Flow Template opens with an unscaled drawing page in landscape (wide) orientation.

To change the page settings and drawing scale:

1. Choose File > Page Setup.

2. On the Page Size tab and the Drawing Scale tab, choose the settings you want for the drawing size, the printed page size, and the drawing scale, then click OK.

   To change the measurement units, click the Page Properties tab and choose the unit you want to use from the Measurement Units list, then click OK.

See also:
Rotating and resizing pages
Setting page orientation and scale

Configuring process flow shapes

When you drop some of the process flow shapes on the drawing page, Visio Technical prompts you for information about the shape characteristics. For example, when you drop the Tube Bundle 2 shape (Process Flow - Heat Equipment stencil), a dialog box prompts you to set the tube bundle type. If you want to change the data in the property fields after you've dropped the shape on the page, right-click the shape, then choose the appropriate command, such as Change To U-Tubes, from the shortcut menu.

Other process flow shapes include commands you can choose from the shortcut menu to configure the shape, but may not prompt you for information automatically. For example, you can right-click the Autoclave shape to remove the motor or change the agitator type.

Setting drawing properties

You can change certain default drawing settings that affect shape behavior. You can choose to display a dialog box that prompts you for information for each shape you drop on the page. You can also choose to add incremental shape ID numbers automatically.

To change default drawing settings:

1. Cancel any shape selections by clicking a blank area of the drawing.

2. Right-click the drawing page, then choose whether or not you want Visio to prompt you for information about a shape when you drop it on the page (Ask/Don't Ask for Custom Properties), and whether or not you want shapes to display an incremental ID number automatically.

   If you choose Increment IDs Automatically, you can also choose Reset Next ID Number to define the starting ID number for different types of shapes.

To create a process flow diagram:

1. Choose File > Stencils > Annotation > General - Title Blocks to open the Title Blocks stencil and add a title block shape or other reference information.

2. Add and connect the process components. Where applicable, use the shortcut menu to configure a shape, or to associate an ID number and description with the shape.

3. To add new or replace existing text on a shape, select the shape, then type the text.

   Many of the process flow shapes have a control handle you can drag to reposition the text block.

See also:
About creating and revising connected drawings

Using layers with process flow drawings

A layer is a named category of shapes. When you create a process flow diagram, Visio Technical places the shapes on layers. For example, when you drop a shape from the Process Flow - Vessels stencil, Visio Technical adds the shape to a Vessels layer.

When shapes are assigned to separate layers, you can treat the layers of shapes separately. For example, you can hide or lock all layers except the one you want to work on or you can print shapes based on their layer assignments. You can also generate numeric or inventory reports for shapes on particular layers.

See also:
About layers

To view only one layer in a drawing:

1. Choose View > Layer Properties.

2. In the Layer Properties dialog box, under Visible, uncheck all the layers except the one you want to view, then click OK.

Working with shape properties

A custom property is a field in which you can store information. You can enter data into a shape's existing fields by selecting the shape and then choosing Shape > Custom Properties.

If you want to associate additional data with your process flow shapes, you can run the Custom Properties Editor to add properties.

To run the Custom Properties Editor:

• Choose Tools > Macro > Custom Properties Editor.

See also:
Adding, editing, and deleting custom-property fields

Generating reports from properties

If you've associated custom-property data with your process flow shapes, you can run the Property Reporting Wizard to generate inventory or numerical reports based on the data. For example, you could generate an inventory of all the Mixer shapes for the diagram, including their ID numbers and descriptions.

To run the Property Reporting Wizard:

• Choose Tools > Property Report.

See also:
Creating reports from custom data

Linking shapes to other drawing pages, other files, or World Wide Web locations

You can add navigational links to any shape in your diagram, so that users of the diagram can right-click the shape to jump to separate drawing pages, separate files, or documents on an intranet or the Web. For example, you could link a shape to another page in the drawing that shows a more detailed view of a complex section of the diagram.

To add links to shapes:

- Choose Insert > Hyperlink.

See also:
About using hyperlinks

Placing Visio drawings on the World Wide Web

You can easily convert a Visio drawing to a format Web browsers can read. Then you can distribute the drawing on an intranet or the Web.

See also:
Exporting shapes and drawings in .jpg or .gif format
Saving drawings as HTML pages