

Introducing Visio

This booklet shows you the basics of creating diagrams in the Visio® drawing application. It assumes you are using Microsoft® Windows® 95. If you're using Windows 3.x or Windows NT, what you see onscreen may differ slightly from the pictures in this booklet, but the steps you take in Visio are the same. For more details about working in Visio, see the online Help or *Creating Business Diagrams with Visio*.

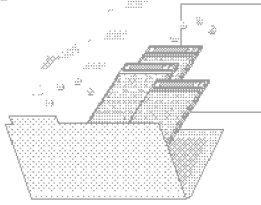
Table of Contents

The Big Picture	3
Starting a Diagram	4
Adding and Arranging Shapes	6
Opening More Stencils	8
Connecting Shapes	10
Adding Text	12
Drawing Your Own Shapes	14
Modifying Shapes	16
Working Smart	18
Previewing and Printing Your Diagram	20
Saving and Closing a File	21
More Visio Tips	22

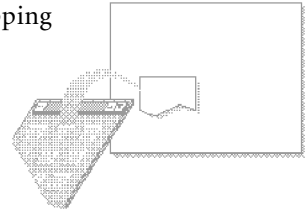


THE BIG PICTURE

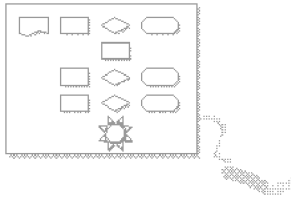
- 1 Start a diagram by opening a template.



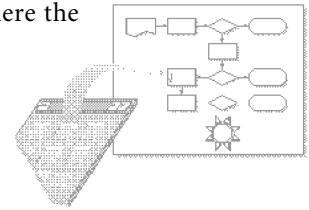
- 2 Add shapes by dragging them from the stencil and dropping them on the drawing page.



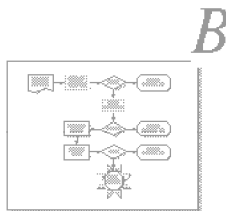
- 3 Arrange shapes to create the diagram you want.



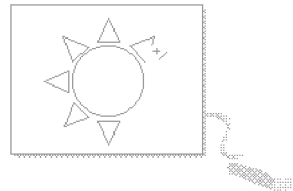
- 4 For diagrams such as flowcharts, glue shapes so that they remain connected regardless of where the shapes are located.



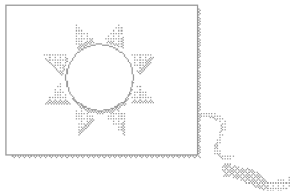
- 5 Add text to shapes and independent text for titles.



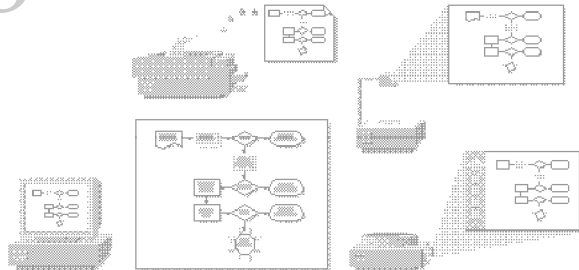
- 6 Draw your own shapes.



- 7 Modify the look of shapes.



- 8 Include your diagram in another program or print it.



STARTING A DIAGRAM

When you create a diagram in Visio, you generally begin by opening a *template*. A template is like a kit for building a particular type of diagram.

Templates open *stencils* you'll need to create a diagram. Stencils contain *master shapes* that are typically used to create the selected diagram. For example, when you open the Office Layout template, Visio opens a stencil containing shapes used to create office layouts—desks, tables, computers, modular panels, and so on.

Templates also open and set up drawing pages, styles, and the drawing scale for a particular type of diagram. Using a template is especially important when you're creating a scaled diagram, such as an office layout, where shapes represent real objects.

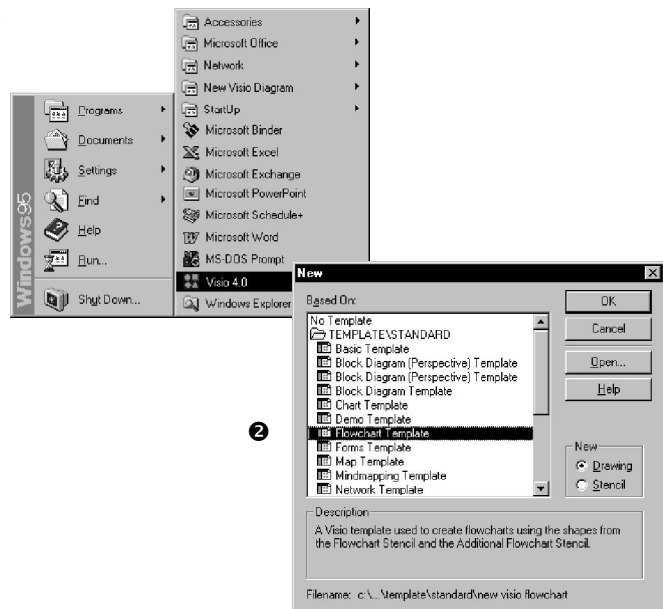
Tip: You can automate creating many diagram types using one of Visio's Wizards. For details, see the online Help: press F1, click Search, then type "wizards" to view a list of related topics.

Start Visio

1. If you're using Windows 95, click Start, choose Programs, choose Visio.

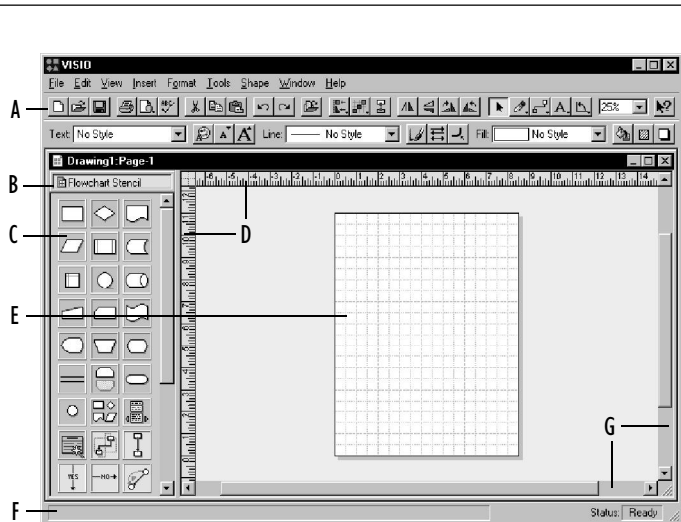
If you're using Windows 3.x, double-click the Visio icon in the Windows Program Manager.

2. From the New box, under Based On, choose a template, then click OK.



The Visio window

- A Toolbar
- B Stencil
- C Master shape
- D Rulers
- E Drawing page
- F Status bar
- G Scroll bars



When you open a template, Visio opens a stencil and a drawing window that contains a blank drawing page.

ADDING AND ARRANGING SHAPES

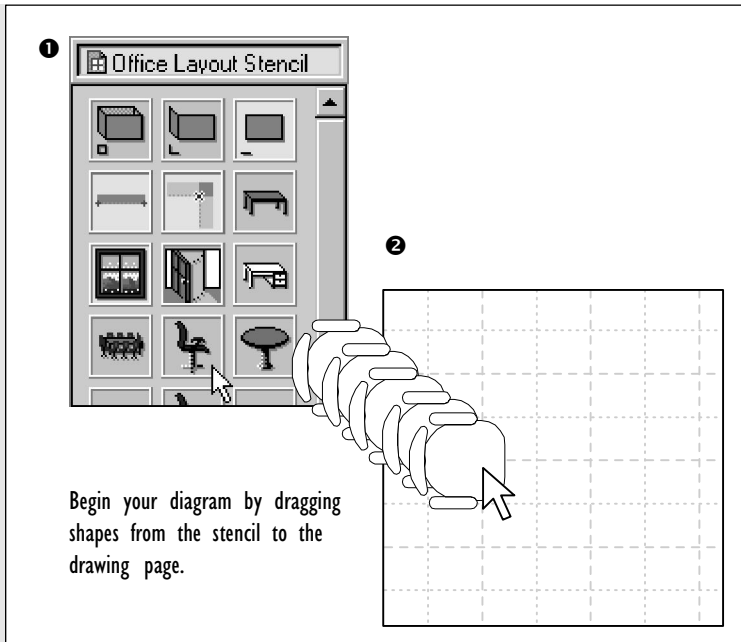
To use a shape, drag the shape from the stencil and drop it on the drawing page. If you don't know what a shape is or how to use it, right-click it, then choose Shape Help from the shortcut menu.

After you add a shape, you can move it to the location you want and change its size. For example, you can add a wall, move it to where you want, and then resize it to the correct length. Some shapes cannot be sized because they must be proportional to other shapes in a diagram.

For details, see the online Help: press F1, click Search, then type "shapes" or "handles" to view a list of related topics.

Add a shape to a diagram

1. With a template open, point to a master shape in the stencil window and press the left mouse button.
2. Hold down the mouse button and drag the shape to the drawing page, then release the mouse button.

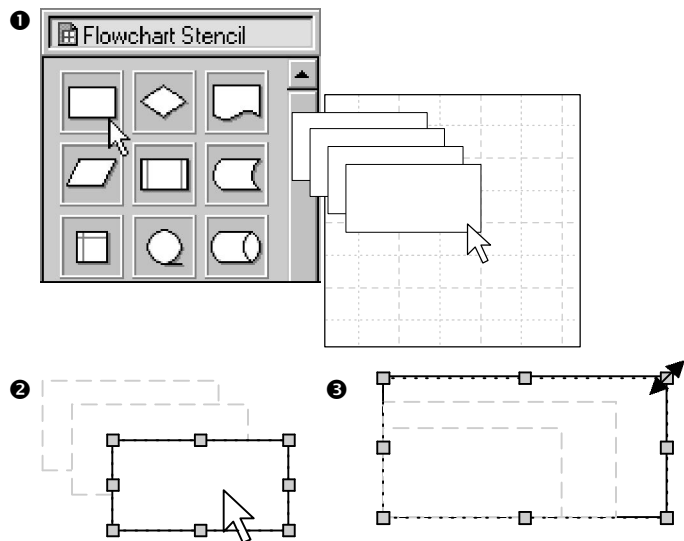


Move and size a shape

1. With a template open, drag a shape from the stencil and drop it on the drawing page.
2. To move the shape, point inside it on the drawing page, select it by pressing the left mouse button, drag it to where you want, then release the mouse button.

The pointer turns white when it's over a shape.

3. To size a selected shape, point to a selection handle until the pointer changes to a double arrow, then drag the handle to change the size.

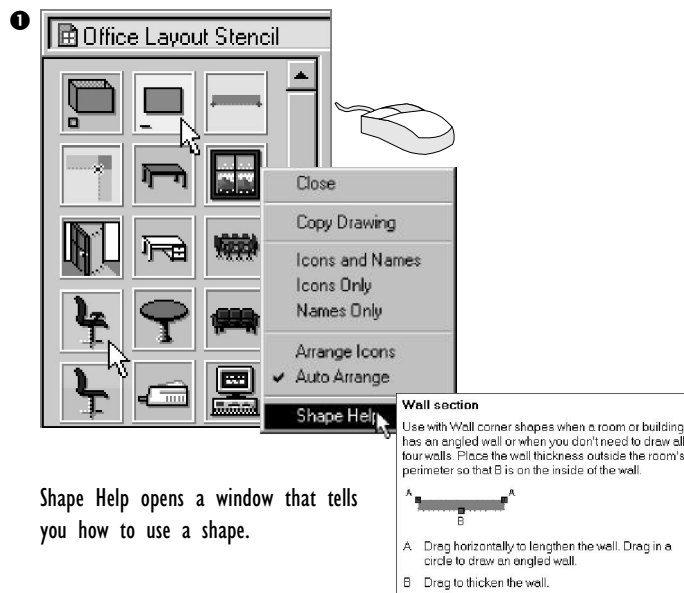


Drag a corner handle to resize a shape proportionally.

Get help on a shape

1. Right-click a shape (on the stencil or drawing page), then choose Shape Help from the shortcut menu.

Click anywhere away from the Shape Help window to close it.



Shape Help opens a window that tells you how to use a shape.

OPENING MORE STENCILS

You can use any stencil you want to add shapes to your diagram; you aren't limited to the stencil that's opened by the template you start with. Open stencils can be:

- Docked, so they are attached to the left or right side of the drawing window.
- Floating, so that you can move them anywhere on the screen.

When you open multiple stencils, they are docked by default on the left side of the drawing window, and the stencil names are stacked in a column. To view the shapes on a stencil, click the stencil's name.

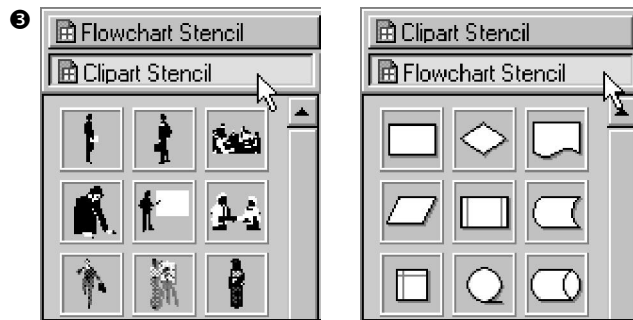
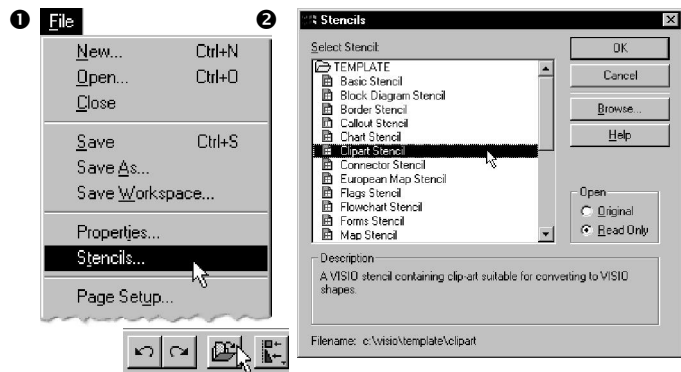
For details, see the online Help: press F1, click Search, then type "stencils" to view a list of related topics.

Open another stencil

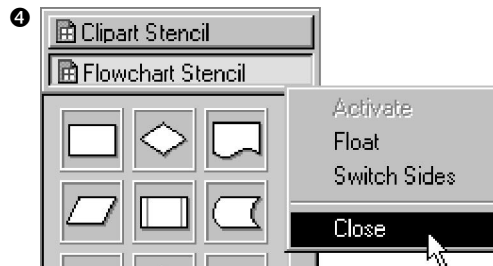
1. From the File menu, choose Stencils.

Or, click the Stencils button on the toolbar.

2. Under Select Stencil, choose a stencil, then click OK.
3. To switch stencils, click the name of the stencil you want to view.
4. To close a stencil, right-click its title bar, then choose Close from the shortcut menu.



The stencils switch order so you can see the one you clicked.



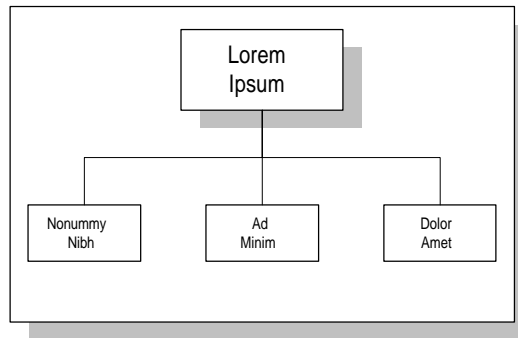
Tip: To make a stencil float, right-click its title bar, then choose Float from the shortcut menu.

CONNECTING SHAPES

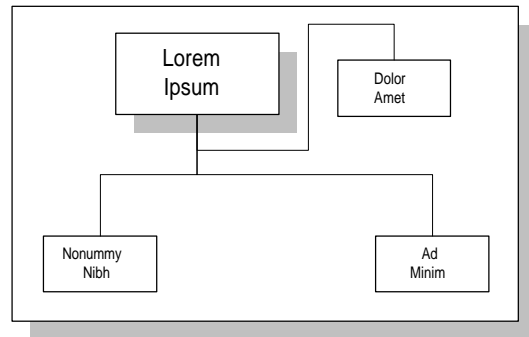
For certain types of diagrams, connecting shapes is a must. You can glue shapes so that they stay connected even when a shape is moved. For example, when shapes in an organization chart are connected, you can arrange the shapes on a page without changing the hierarchy established by the connections.

If you know how shapes should be arranged and connected, you can connect as you drag. Or, you can drag and drop the shapes you want, arrange them, and then connect them.

For details, see the online Help: press F1, click Search, then type “connecting shapes” to view a list of related topics.



Original organization chart

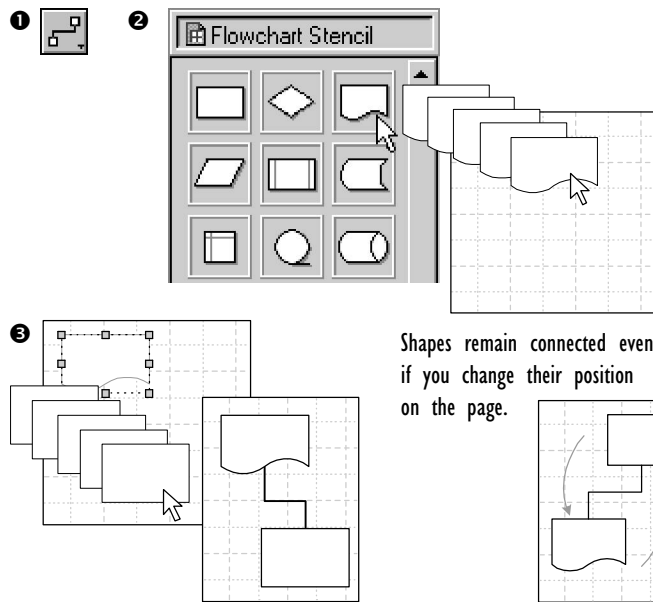


Organization chart rearranged, but with the same connections

Connect shapes as you drag

1. With a template open, choose the connector tool from the toolbar.
2. Drag a shape from the stencil and drop it on the drawing page.
3. While the shape is still selected, drag another shape from the stencil and drop it on the drawing page.

The shapes are automatically connected.

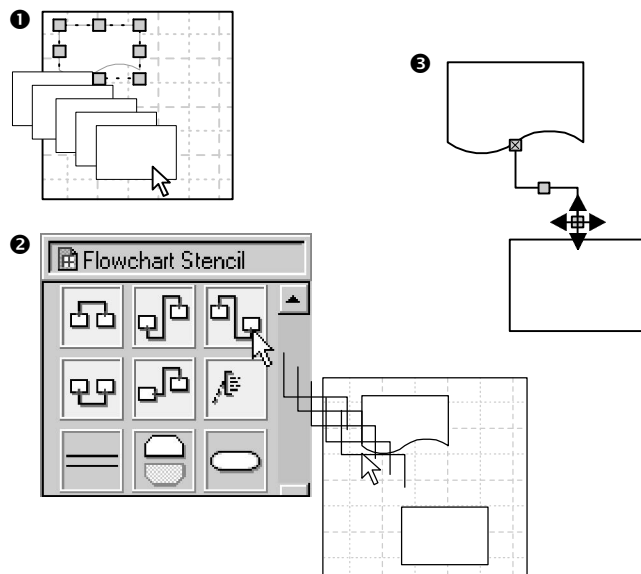


Connect existing shapes

1. Use the pointer tool to drag two shapes you want from the stencil and drop them on the drawing page.
2. From the stencil, drag a connector shape and drop it on the drawing page.
3. Drag one of the connector's endpoints to a connection point on a shape, then drag the other endpoint to a connection point on the other shape.

The connection points turn red when they're glued.

When the pointer tool is over an endpoint, it changes to a four-headed arrow.



ADDING TEXT



Click the shape and type.

Every shape, including lines and connectors, can have text, and the text can be formatted to suit your needs. To add text to a shape, you click the shape and then type. To add a title or other text not associated with a shape, you click with the text tool where you want to start the text and then type.

When you rotate or move a shape, its text rotates and moves with it.

To quickly change the look of a shape's text, select the shape, then choose an option from a style list or click a text style button on the toolbar. You can also use the commands on the Format menu.

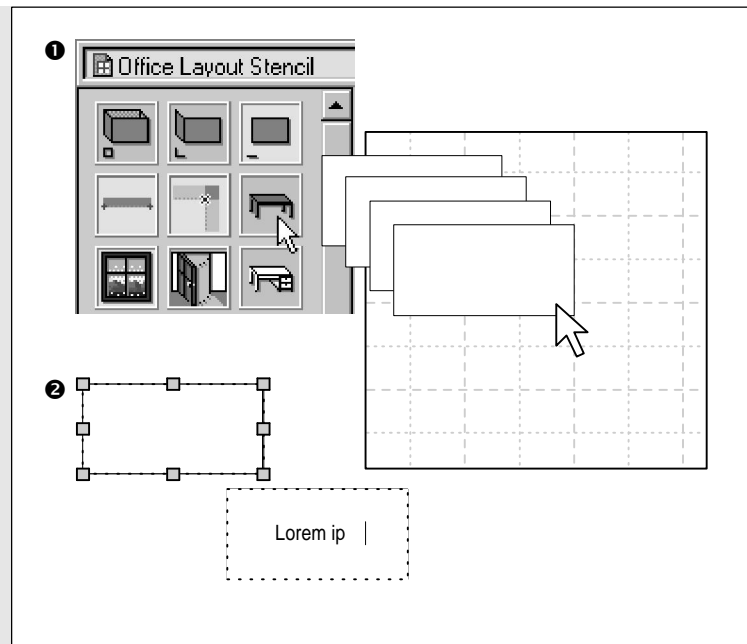
Also, Visio provides several kinds of fields that update automatically. You can include fields in a diagram to hold information that's difficult to update by hand. For example, a field can contain the current date or time.

For details, see the online Help: press F1, click Search, then type "text and text blocks" or "fields" to view a list of related topics.

Type text in a shape

1. With a template open, drag a shape from the stencil and drop it on the drawing page.
If the shape is not selected, click it to select it, then type.
2. When you're finished, press the Esc key or click away from the shape.

Tip: If you are viewing a reduced page, Visio zooms by default to 100% when you type text.

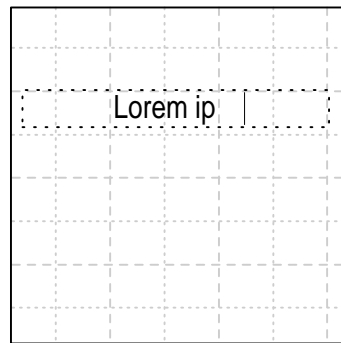


Type independent text

1. From the toolbar, choose the text tool.
2. Click the drawing page where you want the text to start, then type.



2

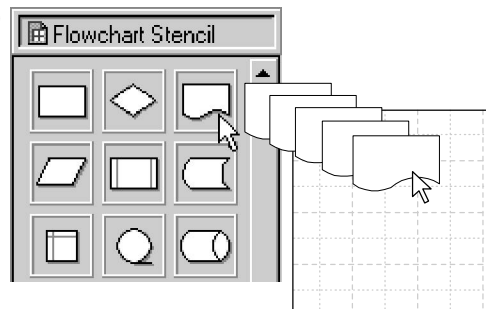


Create independent text to title your diagram.

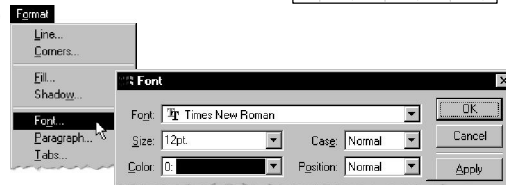
Change the format of text

1. With a template open, use the pointer tool to drag a shape from the stencil and drop it on the drawing page.
2. From the Format menu, choose Font, choose the settings you want, then click OK.

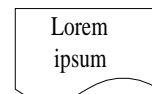
1



2


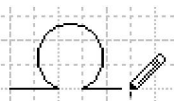







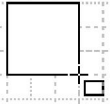




Format text's size, font, and style.



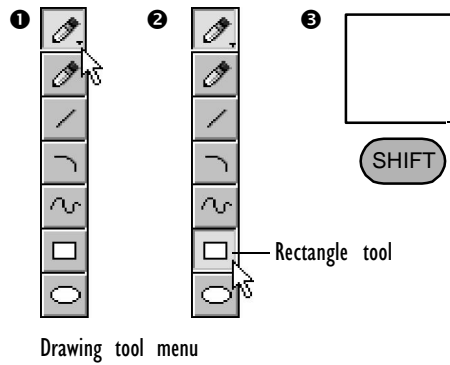
DRAWING YOUR OWN SHAPES

Visio takes the frustration out of drawing by hand. You can choose from a variety of easy-to-use drawing tools.

This tool	Draws this shape
Pencil tool	 
Line tool	 
Arc tool	 
Freeform tool	 
Rectangle tool	 
Ellipse tool	 

Draw a square

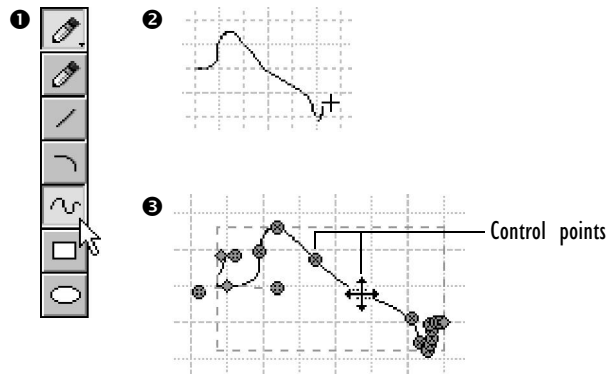
1. Point to the pencil tool on the toolbar and hold down the left mouse button.
2. Choose the rectangle tool from the drawing tool menu.
3. Press the Shift key while you drag diagonally to draw a square, and then release the mouse button.



Draw a freeform shape

1. To draw a freeform shape, choose the freeform tool from the drawing tool menu.
2. Drag in various directions to draw a freeform shape, then release the mouse button.
3. To edit the freeform shape, while the shape is still selected, point to a control point, then drag.

You can also use the pencil tool to edit any shape.



When you first draw a shape with any tool, don't be concerned if it doesn't look exactly right. You can edit the shape later using the pencil tool.

MODIFYING SHAPES

You can quickly modify a shape by changing the look of its line, fill, or text or by flipping or rotating the shape.

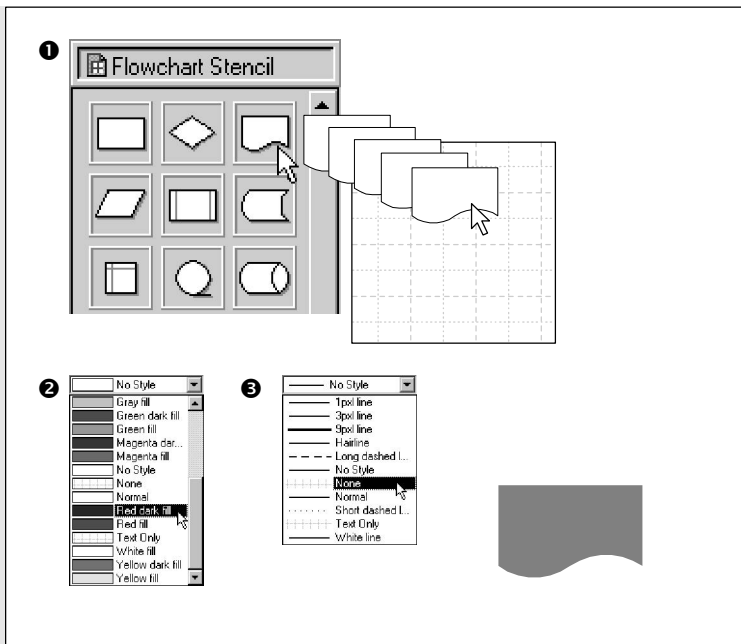
The boxes in the style toolbar show the shape's current text, line, and fill styles, and you choose new styles from the toolbar style lists.



For details, see the online Help: press F1, click Search, then type “formatting shapes” to view a list of related topics.

Change the look of a shape

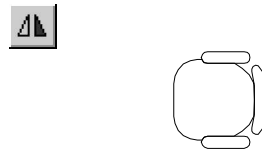
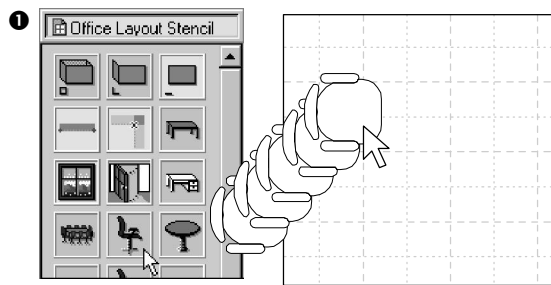
1. With a template open, drag a shape from the stencil and drop it on the drawing page.
2. With the shape selected, choose a new color from the Fill style list on the toolbar.
3. From the Line style list on the toolbar, choose a new line style.



Flip a shape horizontally

1. With a template open, drag an asymmetrical shape from the stencil and drop it on the drawing page.
2. From the Shape menu, choose Flip Horizontal.

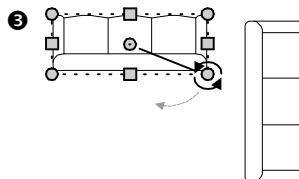
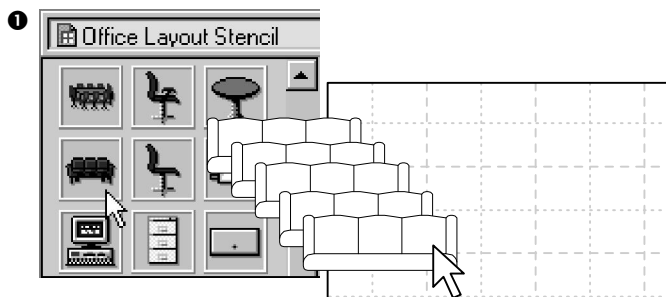
Or, click the Flip Horizontal button on the toolbar.



You can flip, reverse, or rotate shapes so they face the proper direction.

Rotate a shape

1. With a template open, drag a shape from the stencil and drop it on the drawing page.
2. From the toolbar, choose the rotation tool, then select the shape.
3. Drag a rotation handle to rotate the shape.



WORKING SMART

You can create your own stencils and templates, in addition to those that come with Visio. Create your own stencils if you want to mix and match shapes from several stencils and store them in one place, store a new set of shapes for a particular type of diagram unique to your business, or store a shape that you've modified.

Create your own template if you frequently use the same stencils, styles, and page settings in your diagrams.

Many shapes that come with Visio have special behavior, such as arrows with heads that keep their shape even when you stretch the arrow. Every shape, including the shapes you draw, is backed by a ShapeSheet. You can enter formulas in the ShapeSheet to create specialized “smart” behavior. The SmartShape Wizard automates some of this work for you.

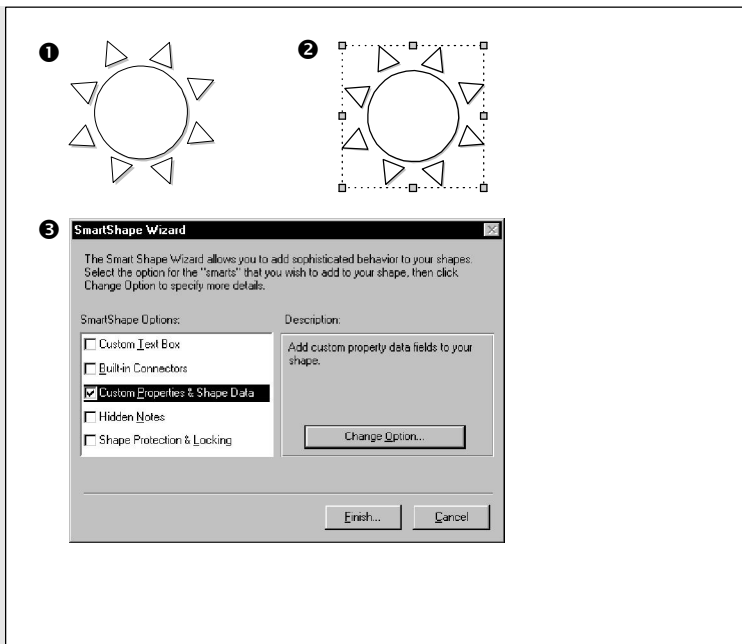
For details, see the online Help: press F1, click Search, then type “templates,” “stencils,” or “shapesheets” to view a list of related topics.

Add smarts to a shape

1. Draw a shape with the drawing tools.
2. Select the shape, then, from the Tools menu, choose Run Add-on, then choose SmartShape Wizard (Shpsmart).
3. Follow the instructions onscreen.

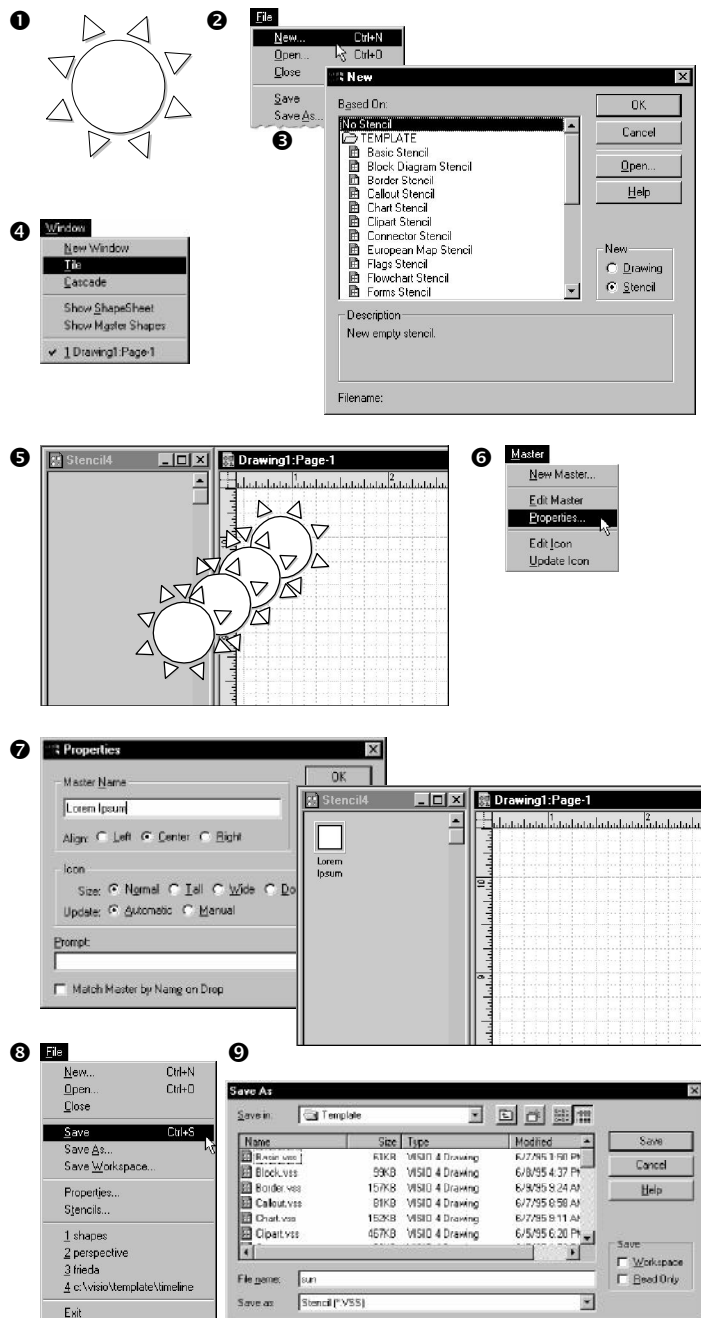
Tip: You can also use the SmartShape Wizard to modify the existing smarts of a Visio shape.

Visio adds smarts to a copy of your shape and also retains the original shape.



Create a new stencil

1. Draw a shape using the drawing tools.
2. From the File menu, choose New.
3. Under New, click Stencil. From Based On, choose No Stencil, then click OK.
4. From the Window menu, choose Tile.
5. Drag the shape from the drawing page onto the new stencil.
6. With the stencil selected, and with the shape selected on the stencil, choose Properties from the Master menu.
7. Under Master Name, type a name, then click OK.
8. Click the stencil title bar, then choose Save from the File menu.
9. Type a name for the stencil, choose where you want to save it, then click Save. Enter properties information, then click OK.



PREVIEWING AND PRINTING YOUR DIAGRAM

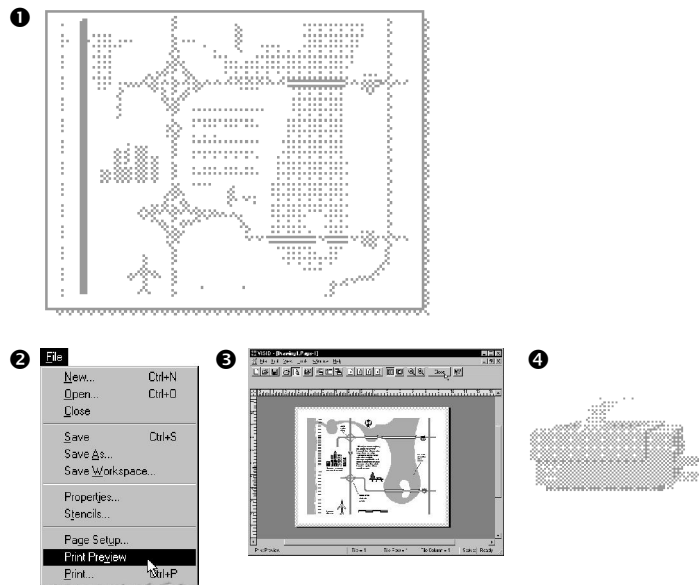
It's a good idea to preview your diagram before you print to ensure you'll get the results you want. For a large drawing, Visio automatically tiles the diagram across multiple pages.

Tip: In Visio, you can set the page and printer orientation separately. If they are different and you print, you may not get the results you expected. To set them to match, from the Edit menu, choose Drawing Page, then choose Size & Scale. Under Drawing Size, choose Same As Printer, then click OK.

For details, see the online Help: press F1, click Search, then type “previewing printed drawings” to view a list of related topics.

Preview and print your diagram

1. Open a file you want to preview and print.
2. From the File menu, choose Print Preview.
3. When you're finished, click the Close button on the toolbar.
4. From the File menu, choose Print, then click OK.



The preview image reflects the current settings in the Page Setup dialog box.

SAVING AND CLOSING A FILE

When you have done substantial work on a diagram, you should save the file. When you change a stencil or template, you should also save these files.

In addition, if you want a file to always open specific stencils in a particular arrangement, you can save your workspace. You can save a workspace within a drawing, stencil, or template file or as a workspace file.

For details, see the online Help: press F1, click Search, then type “saving files” to view a list of related topics.

Save and close the diagram

1. After you have created a new file, choose Save from the File menu.
2. Type a name for the file, click Save, enter properties information, then click OK.
3. From the File menu, choose Close.



MORE VISIO TIPS

This booklet touches on just a few of the many powerful features in Visio. Here are a few more features you may want to explore.

Copying and applying formatting



If you're pleased with the formatting of a particular shape, you can quickly transfer the formatting (such as line, fill, and text styles) to another shape instead of starting from scratch. Select the shape that has the formatting you like, click the Format Painter button on the toolbar, and then select the shape you want to format.

For details, see the online Help: press F1, click Search, then type “format painter tool” to view a list of related topics.

Checking the spelling of text



To ensure a professional diagram, check the spelling of text in shapes, independent text, and stencil shape names. (From the Tools menu, choose Spelling.)

For details, see the online Help: press F1, click Search, then type “spelling check” to view a list of related topics.

Creating evenly spaced shapes

To quickly duplicate a shape at a specific distance from the original, point to the shape on the drawing page, hold down the Ctrl key, and then drag the shape. To make another copy, duplicating the offset (the space between the shapes), press F4.

Finding and replacing text



Make global changes to your diagram by finding and replacing text in shapes, stencil shapes, file properties, and data fields. (From the Edit menu, choose Find or Replace.)

For details, see the online Help: press F1, click Search, then type “finding text” or “replacing text” to view a list of related topics.

Using backgrounds and layers

A background is a page that appears behind another page. A layer is a way of organizing shapes in your drawing. Backgrounds and layers can be used in similar ways.

Use a background page when you want the same text or shape on multiple pages within the same file. For example, you can have your corporate logo on every page that shares the background. For details see the online Help: press F1, click Search, then type “background pages” to view a list of related topics.

Use layers when you want to have categories of text and shapes within the same page. For example, an architectural drawing of a house can be composed of a wall layer, plumbing layer, and electrical layer. In addition, you can view and print specific layers. For details see the online Help: press F1, click Search, then type “layers on pages” to view a list of related topics.

For details, see the online Help: press F1, click Search, then type “foreground pages,” “background pages,” or “layers” to view a list of related topics.

Using Visio with the Microsoft Office Binder

In Microsoft Office for Windows 95, you can create a file that combines pages from multiple programs. For example, a single file can include pages from Microsoft Word, Visio, and Microsoft Excel.

For details, see your Microsoft Office online Help.

Including Visio in other documents

Use object linking and embedding (OLE) to include a Visio diagram in another program, such as Microsoft Word, and to include objects from other programs in your Visio file.

For details, see the online Help: press F1, click Search, then type “ole objects” to view a list of related topics.

Converting ABC FlowCharter and CorelFlow diagrams to Visio

If you created diagrams in ABC FlowCharter (2.0, 3.0, or 4.0) or CorelFlow 2.0, you can open them in Visio and convert them to Visio diagrams.

For details, see the online Help: press F1, click Search, then type “converting” to view a list of related topics.

Adding database information to a shape

You can add database information to a shape by defining fields in its ShapeSheet and then entering data using the Custom Properties dialog box (on the Shape menu). For example, you can add price and item number information to a Chair master shape.

For details, see the online Help: press F1, click Search, then type “custom properties” to view a list of related topics.

Using OLE Automation to control Visio

More advanced users, such as developers or program managers, can customize the Visio user interface as well as use OLE Automation to control Visio.

For details, see the online Help: press F1, click Search, then type “ole automation” to view a list of related topics.

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