Visio 2007
Introduction

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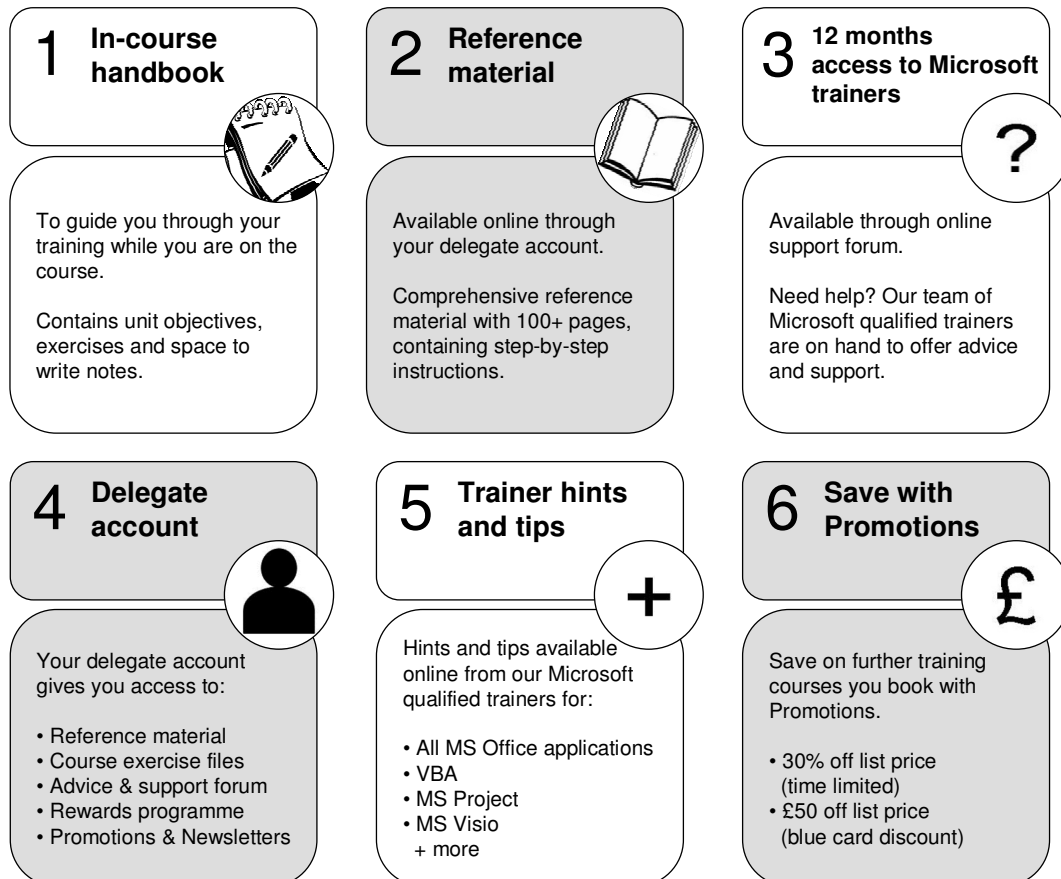- 12+ months schedule
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Contents

Exploring the Visio Environment

In this unit you will be introduced to the visual aspects of Visio and the layout of the working areas. An understanding of what Visio is and some of the overall tools available to you will also be obtained.
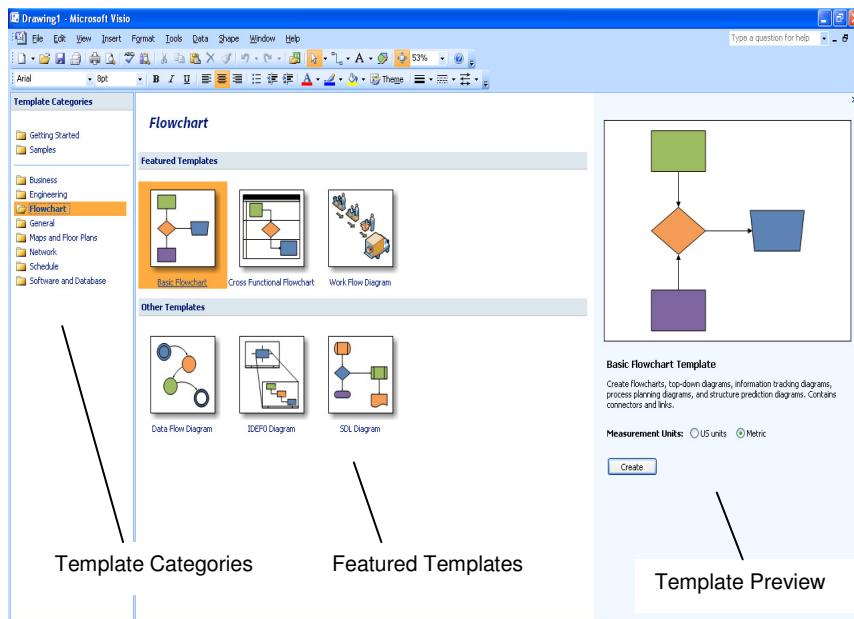
Objectives

Upon completion of this unit you will be familiar with:

- Getting Started Window

- The Visio Work Area

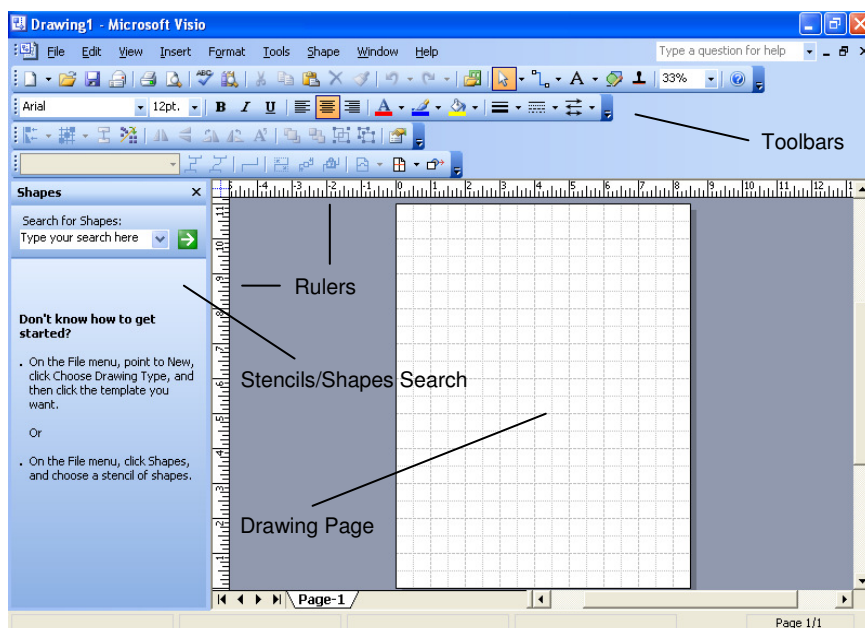- Overview of Templates, Stencils and Objects

- Changing View Settings

Getting Started

Templates Window

Template Categories   Featured Templates

Template Preview

The built-in Templates will open a new Drawing with the relevant Stencils and Toolbars open ready for use.

The Visio Drawing Window

Toolbars

Rulers

Stencils/Shapes Search

Drawing Page

There are many aspects to the Drawing Window

- Toolbars
- Rulers
- Stencils and Shapes Search Pane
- Drawing Page

Overview of Stencils and Objects

All Stencils'

Open Stencil/Template
Default Stencil's

Objects
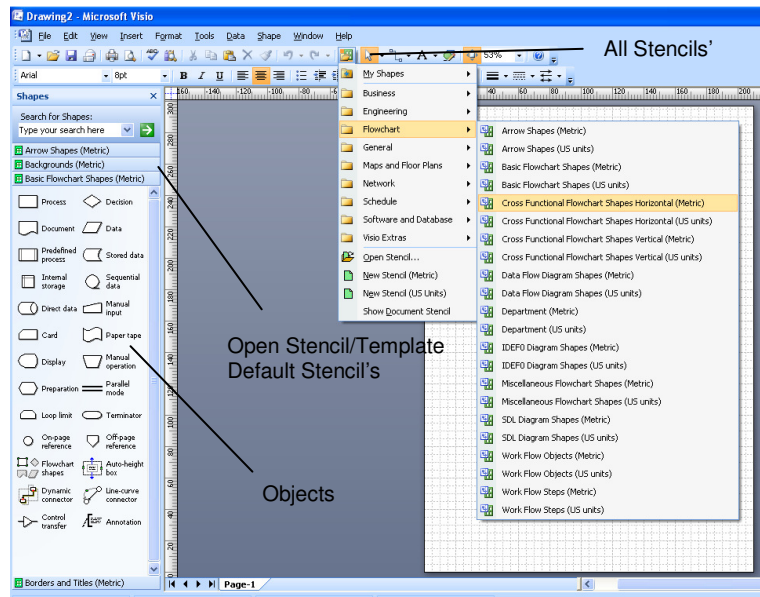
It is easy to open
additional Stencils
should the built-in
Template not
provide them by
default.

Select the Shapes
button on the
Standard Toolbar
to view and open
available Stencils.

New Drawings
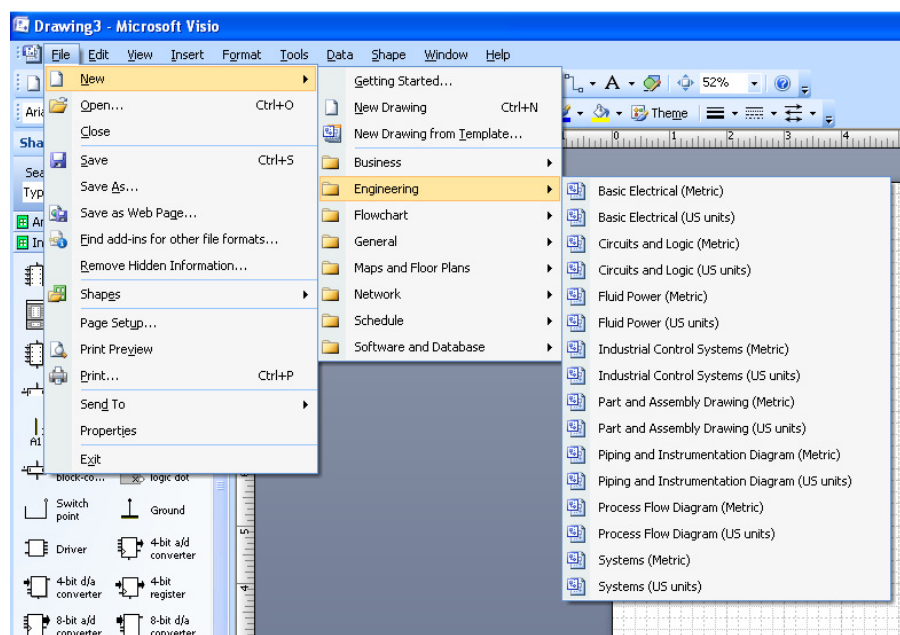
It is easy to create
a New Drawing
from the built-in
Templates if you
are already in an
existing Drawing.

Notes

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Changing View Settings
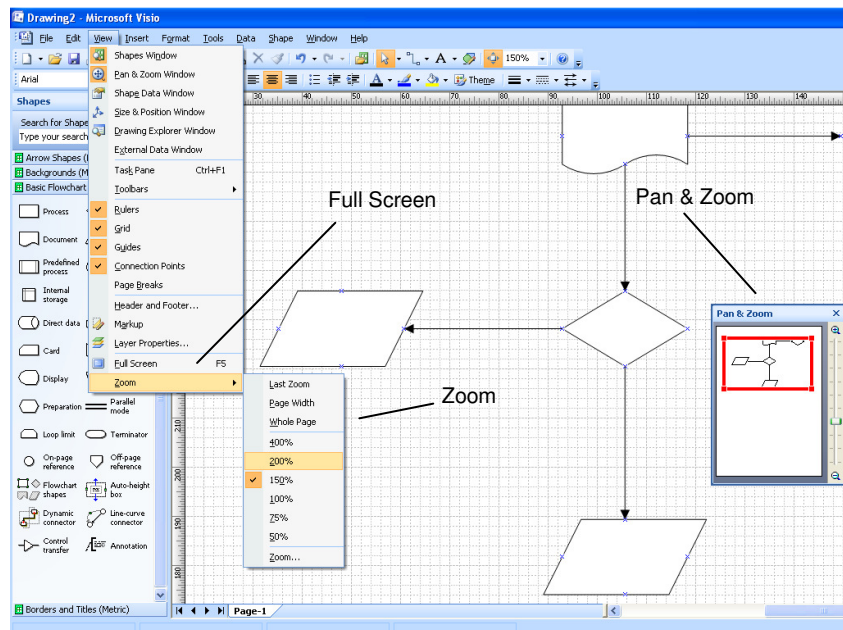
Full Screen

The Pan & Zoom Window combined with the Zoom tool make working with detailed and complex diagrams easier to ensure the minute details are completed correctly and then allow an overall view of the drawing.
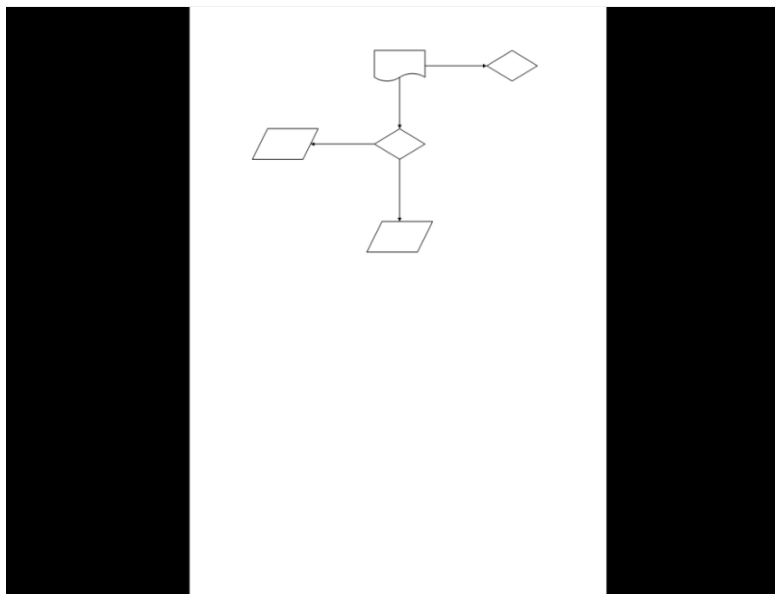
Full Screen is used for reading/viewing your drawings on screen. It allows the viewer to focus only on the drawing.

Notes

Drawing Tools

In this unit you will learn to create objects and lines using the Drawing Toolbar, add shapes to your drawing and how to find shapes and stencils.

Objectives

Upon completion of this unit you will be able to:

- Use the Drawing Toolbar
- Draw rectangles and ovals
- Draw lines and curves
- Add shapes to a drawing
- Find stencils and shapes

The Drawing Toolbar
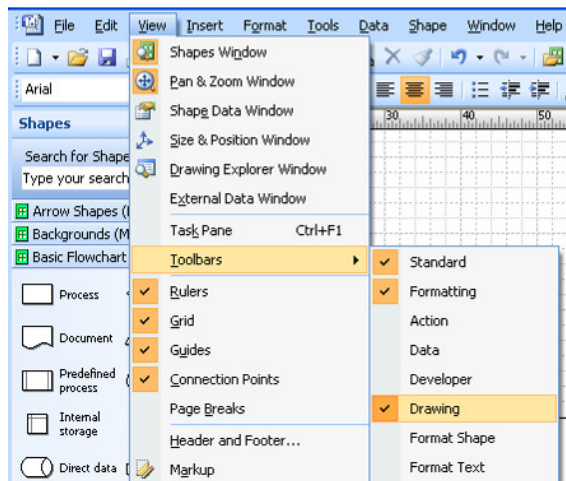
The Drawing Toolbar contains the basic tools.

To access the Drawing Toolbar:

- View-Toolbars-Drawing

Drawing Rectangles and Ovals
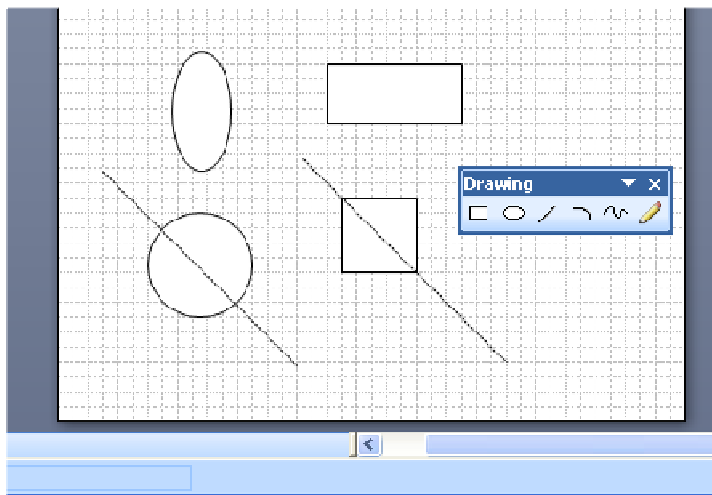
The Oval and Rectangle tools are also the Circle and Square tools.

The diagonal perforated line appears to show when a perfect shape has been achieved.

The Shift key also aids when trying to create a perfect shape.

Notes

Finding Stencils and Shapes
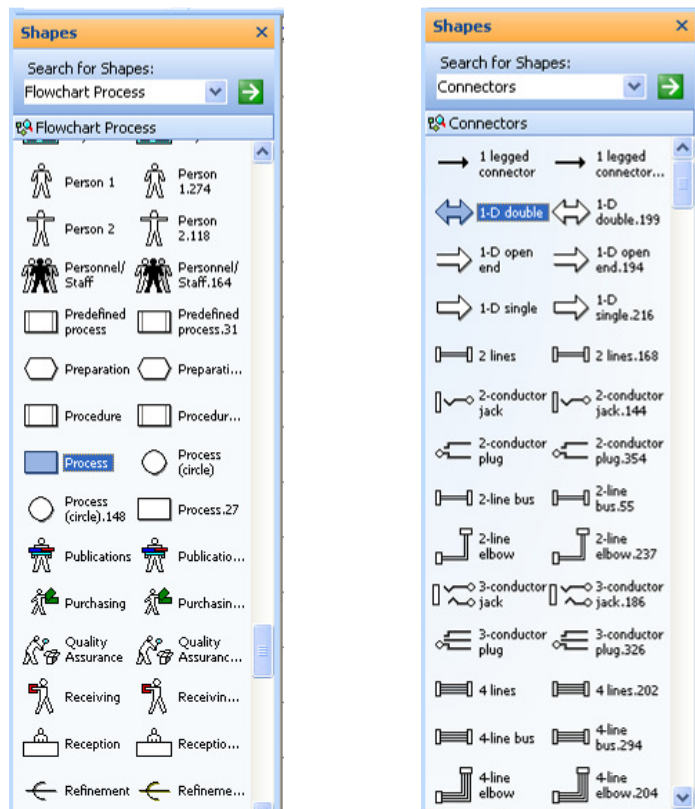
In the Shapes Pane you can search for required Shapes and Connectors.

The Shapes Window is on by default. If the Shapes Window is closed it can be found in the View Menu.

Adding Shapes to a Drawing
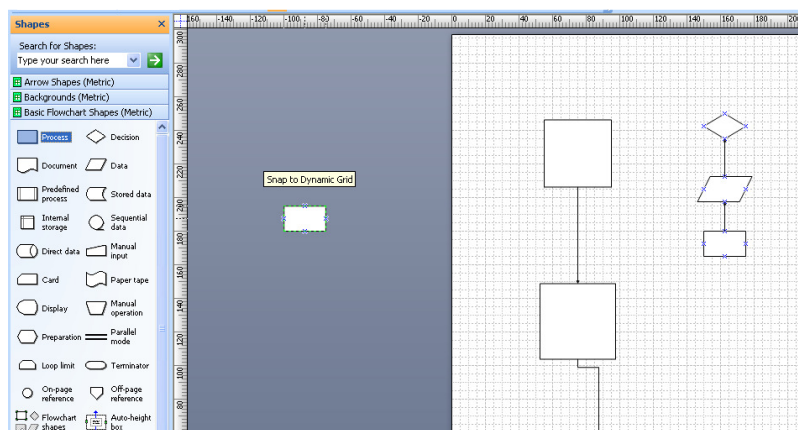
To add a Shape to a Drawing simply drag and drop the Shape from the Stencil onto the Page.

Notes

Drawing Lines and Curves
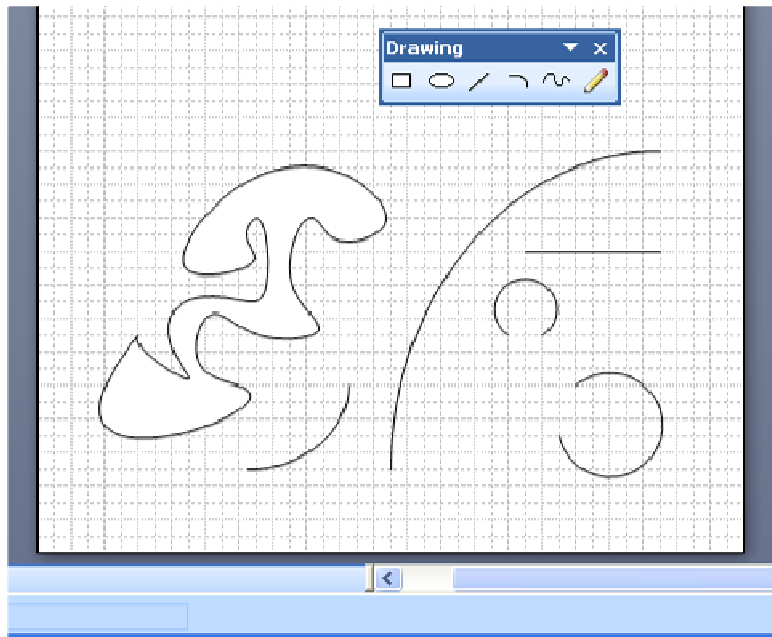
The Lines tools can be used to add to drawings. Simply select the line you require and drag and drop.

Notes

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Creating Basic Diagrams

In this unit you will gain skills that allow you to control shapes and connection tools which will help make creating diagrams easy.

Objectives

Upon completion of this topic you will be able to:

- Select multiple shapes

- Connect shapes

- Align shapes

- Distribute shapes

- Group shapes

- Use Snap & Glue

- Rotate & Flip shapes

- Work with Guides

Selecting Multiple Shapes
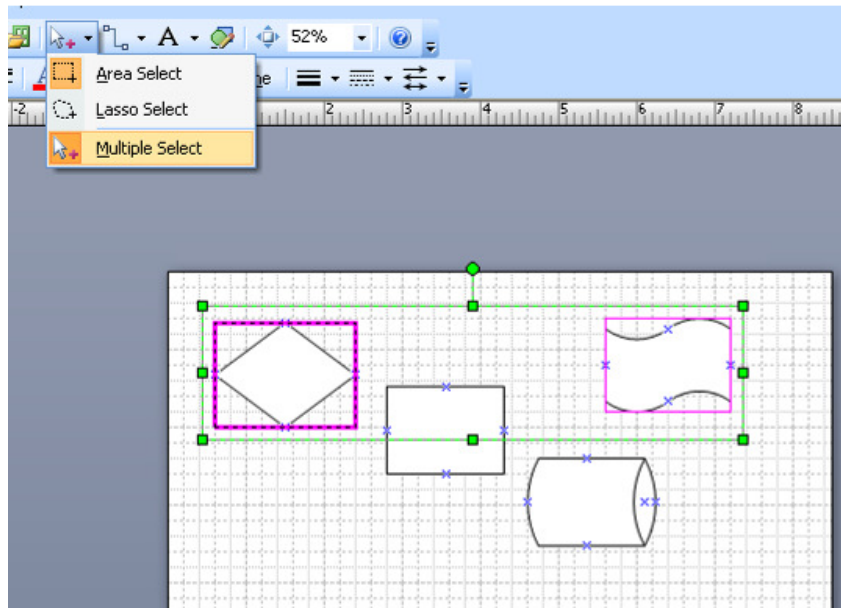
There are many ways to select more than one shape at a time.

The Multiple Select tool allows you to click on individual shapes and it will hold the selection.

The other method to achieve this is to hold the shift key down while selecting each shape.

The Lasso and Area Select allow multiple shapes to be selected by one click and drag over the desired shapes.

Connecting Shapes
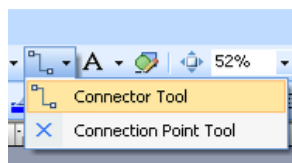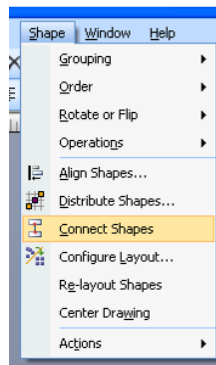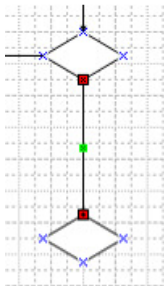
There are a number of ways to Connect shapes.

- All at once using the Connect Shapes option under the Shape Menu:

  Shape-Connect Shapes

- As they are dragged onto the page or individually using the Connector Tool from the Standard Toolbar.
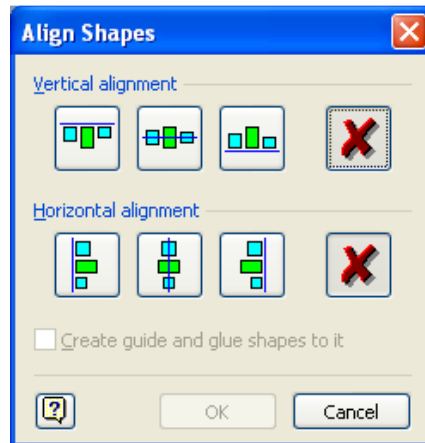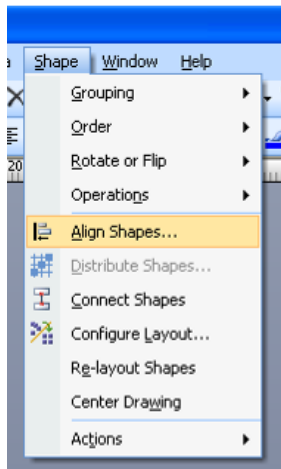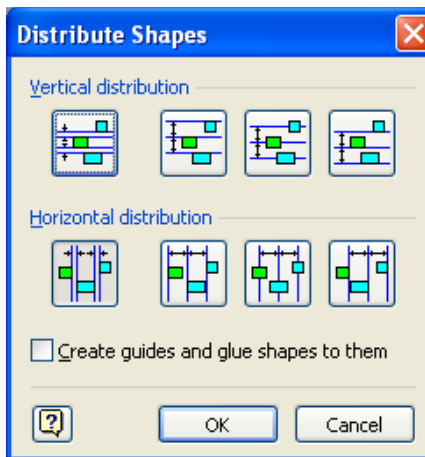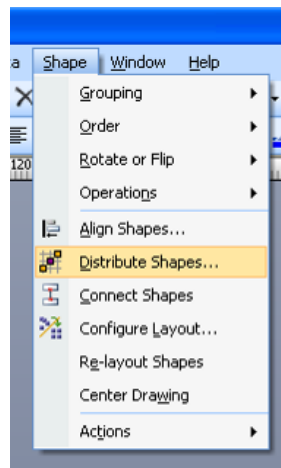
Notes

Aligning Shapes

If the shapes need to be lined up either vertically or horizontally use the Align Shapes Dialogue box under the Shape menu.

Aligning Shapes ensures the connector lines are straight.

Distributing Shapes

Distribution of shapes controls the spacing between the shapes to ensure the distance between the shapes is the same.
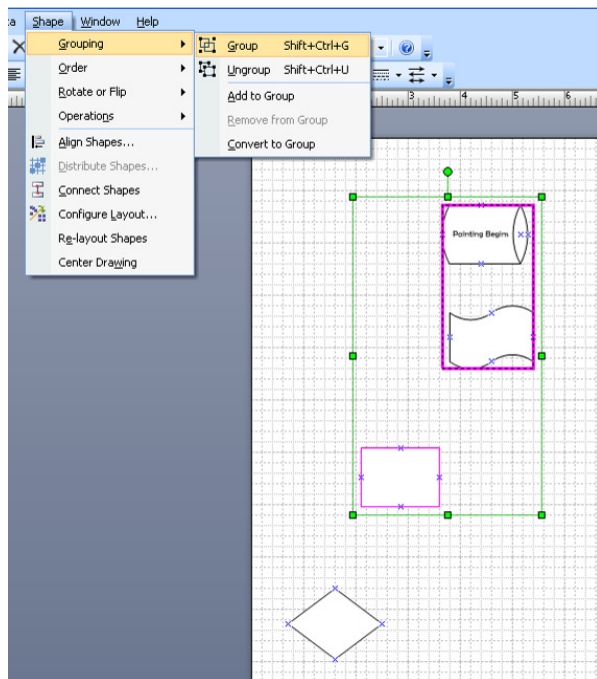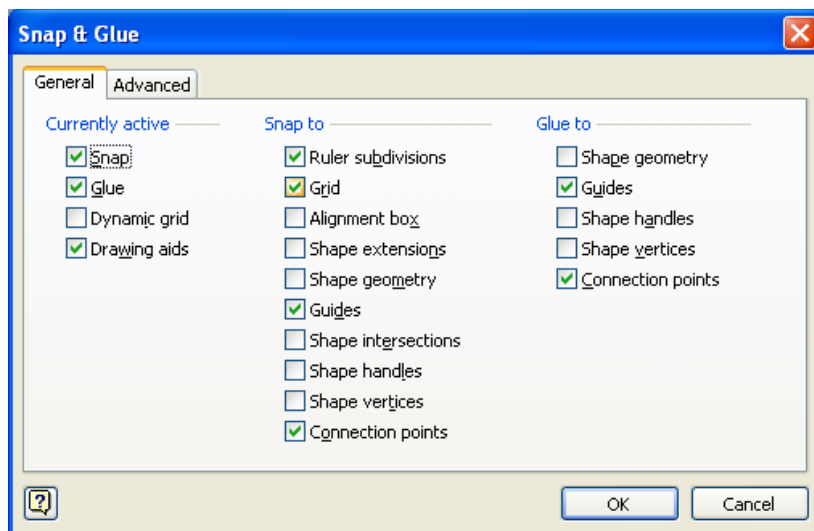
Notes

Grouping Shapes

Use Grouping to keep shapes together so they don't move in relation to each other once in the desired position.

You can have multiple groups.

Shapes in groups can still be singled out so you can work with a grouped shape independently.

- Shape-Grouping-Group

Snap & Glue

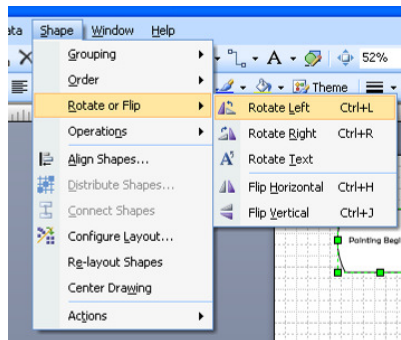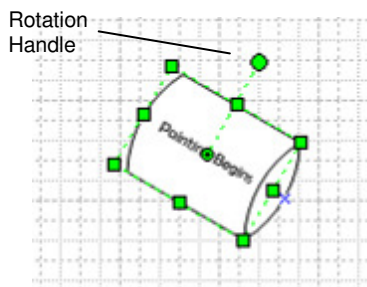Use Snap & Glue to aid in the positioning of shapes.

- Tools-Snap & Glue

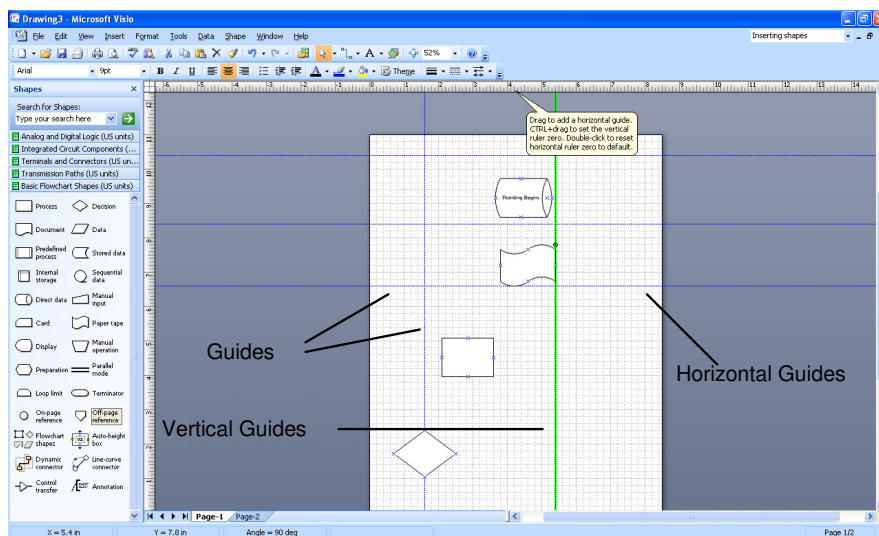## Notes

Rotate or Flip

Rotation Handle

The Rotate Handle positioned at the top of the shape allows the shape to be turned any where from 0 to 360°

You can also use the Rotate or Flip option from the Shape Menu.

- Shape-Rotate or Flip

Working with Guides

Guides

Vertical Guides

Horizontal Guides

Use both Horizontal and Vertical Guides to assist with the placing of Shapes and lines.

Notes

Formatting Shapes

In this unit you will not only learn to add text to shapes and connectors but also how to format text, shapes, connectors and apply Themes. This will allow creation of a consistent look throughout your drawings.

Objectives

Upon completion of this unit you will be able to:

- Change shape and line colour
- Add text to shapes
- Format text
- Use the Format Painter
- Duplicate shapes
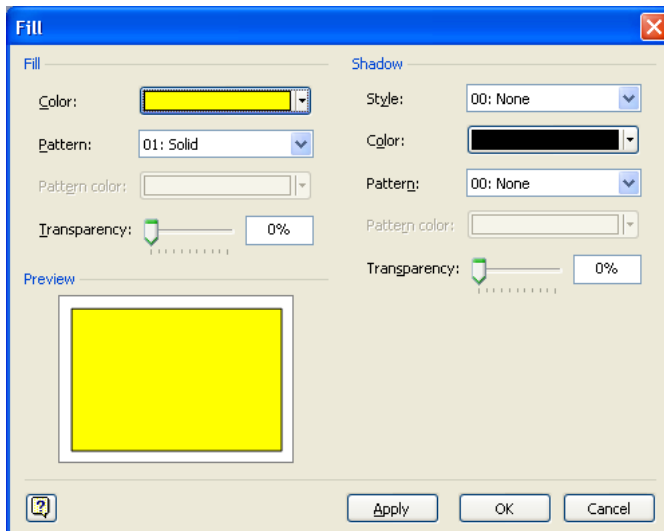- Resize shapes
- Use Themes

Formatting Shapes
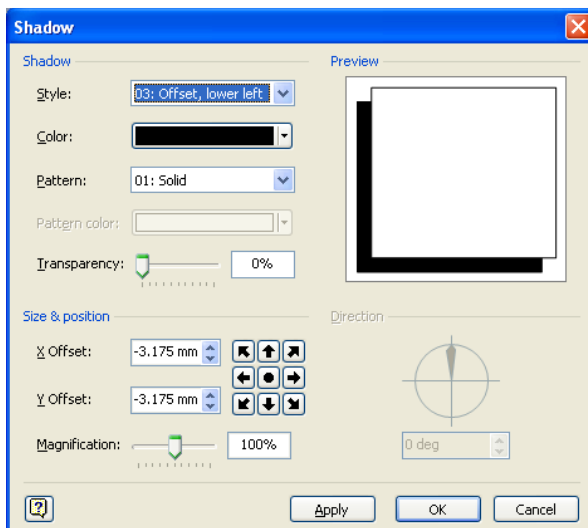
Using the Format Shape Toolbar

The Format Shape Toolbar allows you to alter the selected Shapes Corner Rounding, Transparency, Fill Pattern and Shadow Colour.
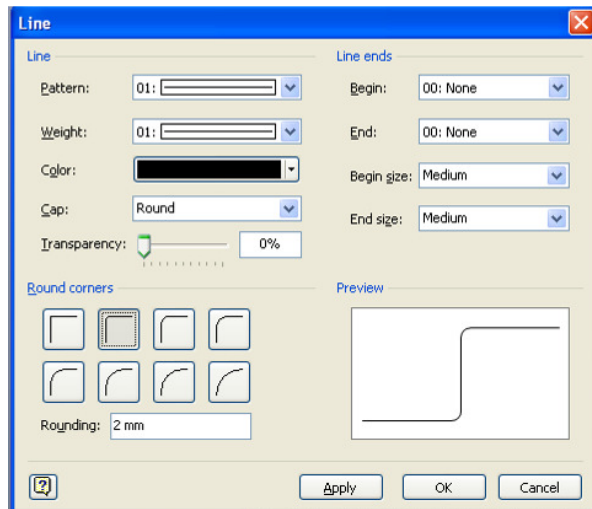
Using the Fill Dialogue Box

The Fill Dialogue box allows you to change the colour and transparency of the selected Shape and its shadow.
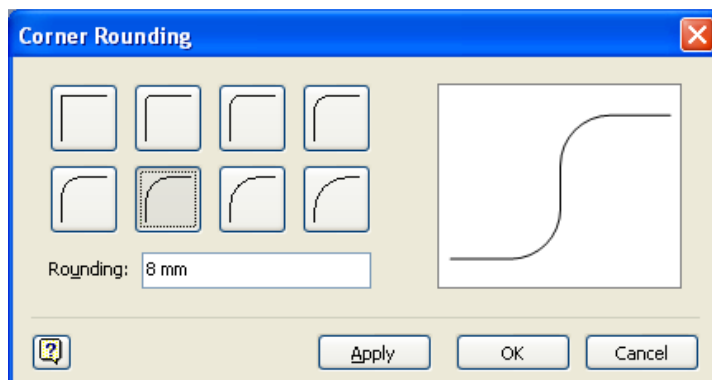
Using the Shadow Dialogue Box

The Shadow Dialogue box is where you set and change the Shadows colouring, transparency and Size and Position.

Formatting Lines and Shape Outlines

The Line Dialogue box allows you to change the Line Style which includes, Pattern, Weight, Colour, Beginning, Sharpness of the corners etc.

Formatting Line and Shape Corners

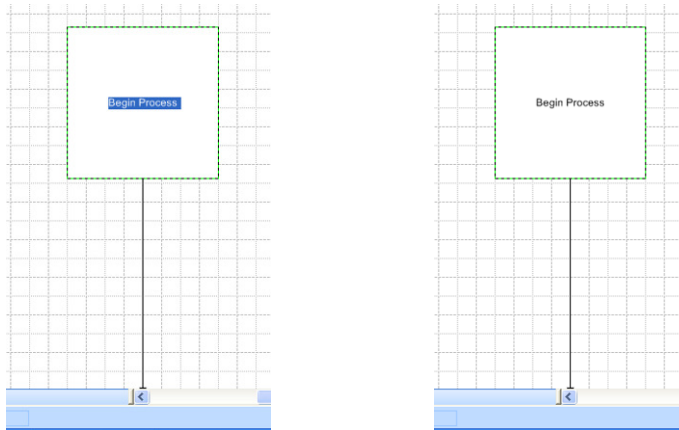The Corner Rounding Dialogue box controls the sharpness of both Line and Shape corners.

Notes

Adding Text to Shapes

To add text to a Shape either:
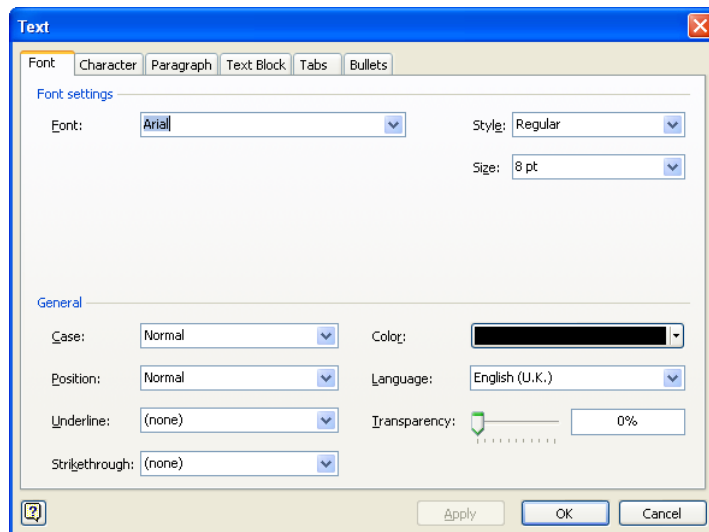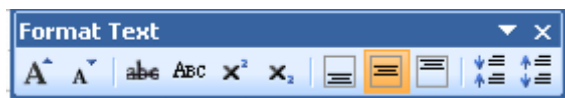
- Double-click on the Shape and type.

or

- Select the shape and type.

The window will zoom in to focus only on that shape.

Once you have completed typing then press Enter.

The window will zoom back out.

Formatting Text

The Format Text Toolbar allows quick access to some of the features found in the Format Text Dialogue Box.

Use the Format Text Dialogue box to format not only Fonts but also Characters, Paragraphs, Text Blocks, Tabs and Bullets.
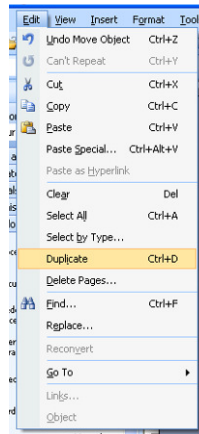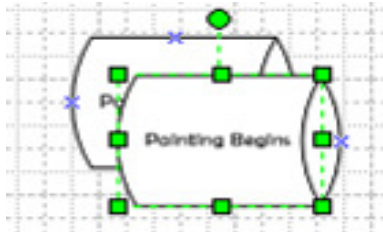
Notes

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Using the Format Painter and Duplication

Duplicate is a quick way to create an exact copy of a shape and all its information.

- Select the Shape
- Edit Menu
- Duplicate

Shortcut:
- Ctrl + D Duplicate
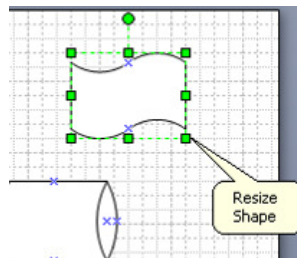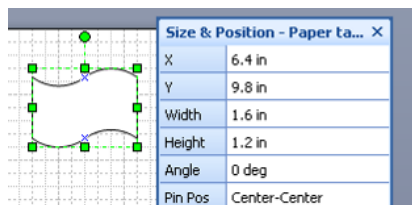
Use the Format Painter to copy formats from one shape to another.

- A single click will allow one use.
- A double click will allow multiple uses.

Resize Shapes

Either select the corner handle to resize (and keep in proportion) the shape or for more accurate resizing use the Size & Position Window.

- View menu
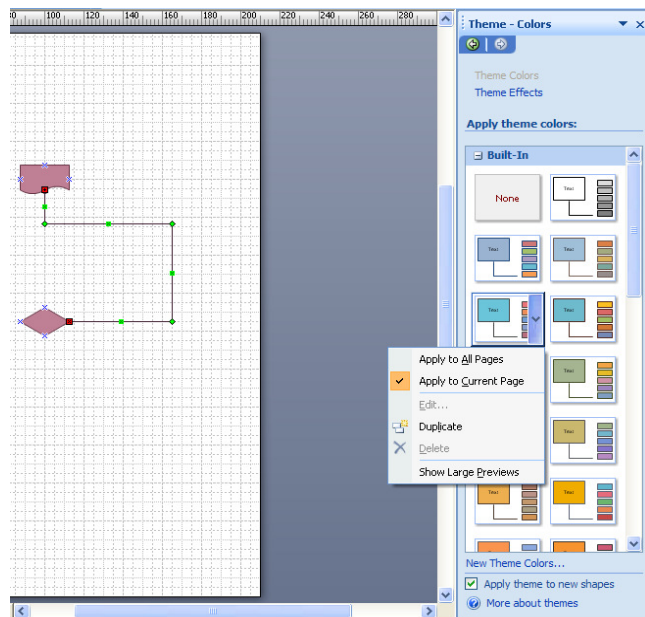- Size & Position

Notes

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Using Themes

Themes are a quick and consistent method with which to format drawings.

Use the Themes Task Pane to apply and modify the built in Themes.

The Theme colours and effects are also set using the Themes Task Pane.

Notes

Working with Pages

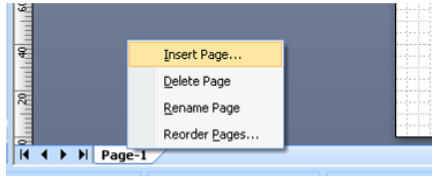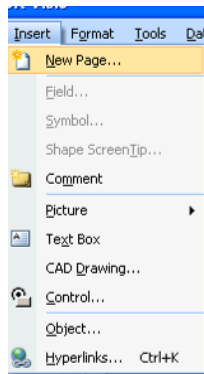In this unit you will learn how to work with both Foreground and Background pages and prepare drawing pages for printing.

Objectives

Upon completion of this unit you will be able to:

- Insert, name and delete pages
- Alter the Page and Printer setup
- Create Background pages
- Insert Headers and Footers

Inserting, Naming and Deleting Pages

New Pages can be created by either:

- Insert , New Page

or

- Right click on an existing Page, select, Insert Page

The Deleting and Renaming of pages is managed on the page tab by right clicking.

Page Setup

Print Setup
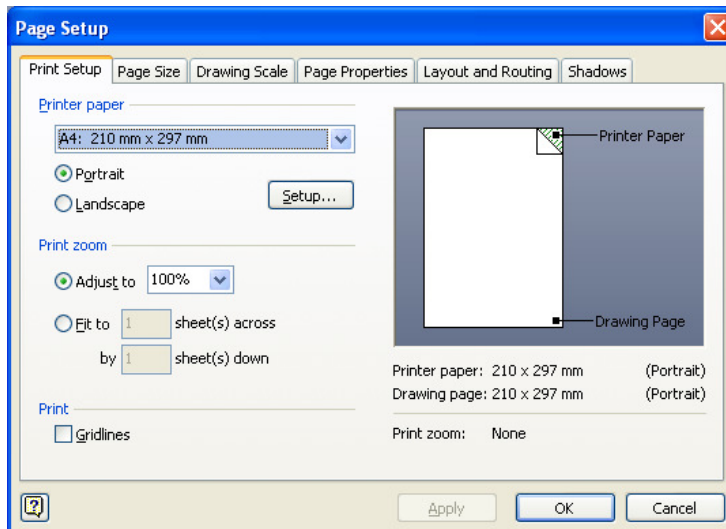
The Page Setup dialogue box is used to ready the drawing for output to printer.

Print Setup Tab is used to set the printer paper and zoom.

Notes

Page Setup

Page Size
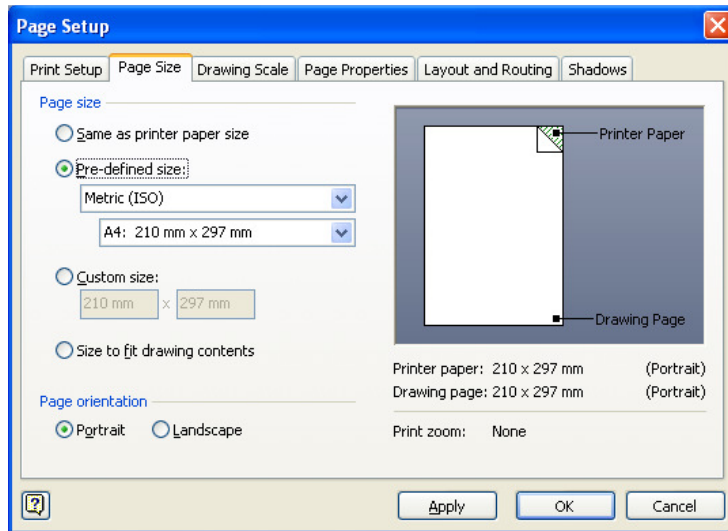
The Page Size Tab allows the on-screen size of the drawing to be set.

This may be different to the Printer paper size.

Page Setup

Drawing Scale
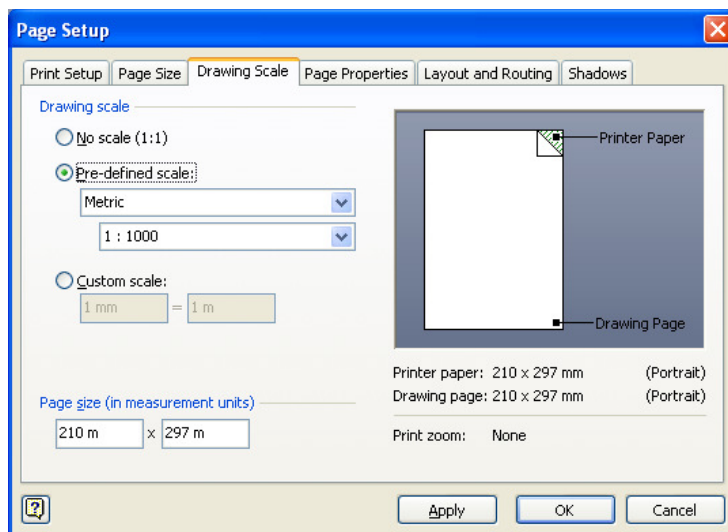
Use the Drawing Scale Tab to set the scale of the current page.

No scale will match the Page Size and Print Setup options selected.

Notes

Page Setup

Page Properties
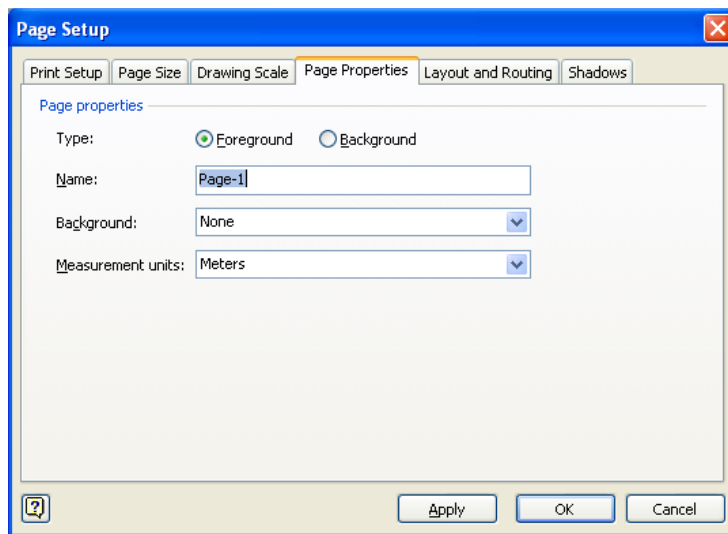
The Page Properties Tab appears every time a new Page is Inserted.

Used to name pages, set measurements and the Page Type – Foreground or Background.

Page Setup

Layout and Routing
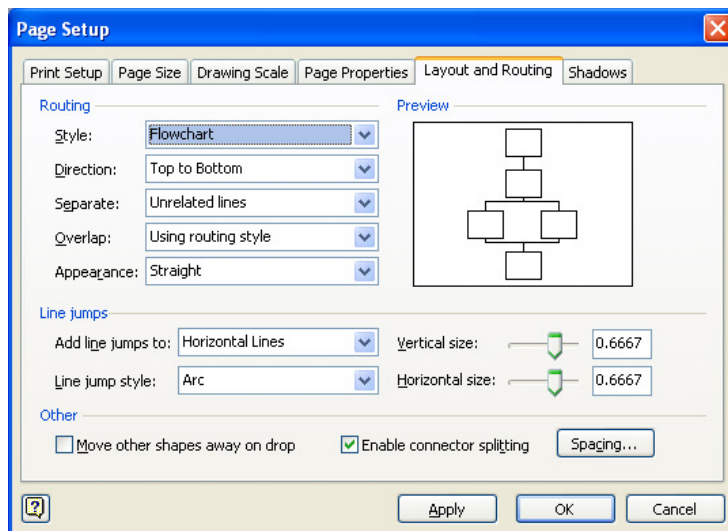
The Layout and Routing Tab sets the default behaviour and style for Dynamic Connecters on the current page.

Notes

Page Setup

> **Shadows**

Page and Printer Setup
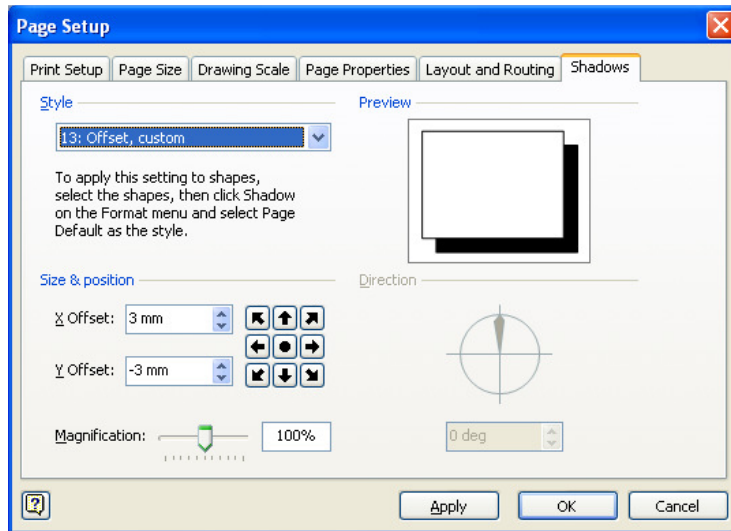
The Shadow Tab allows the default shadow for the current page to be set.

To apply the default shadow to a shape:

- Select the shape
- Format
- Shadow
- Style – Page default
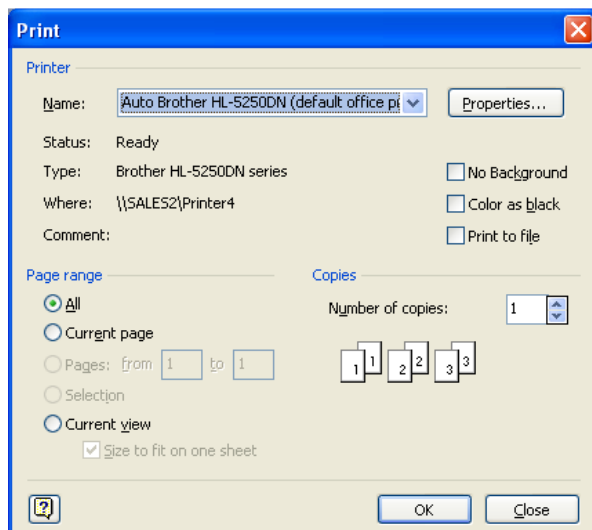
The Print dialogue box will look at options specific to your printer.

This dialogue box allows the selection of how many pages and which pages are to be printed.

Notes

Creating Blank Background Pages

Creating Background Pages Using Templates
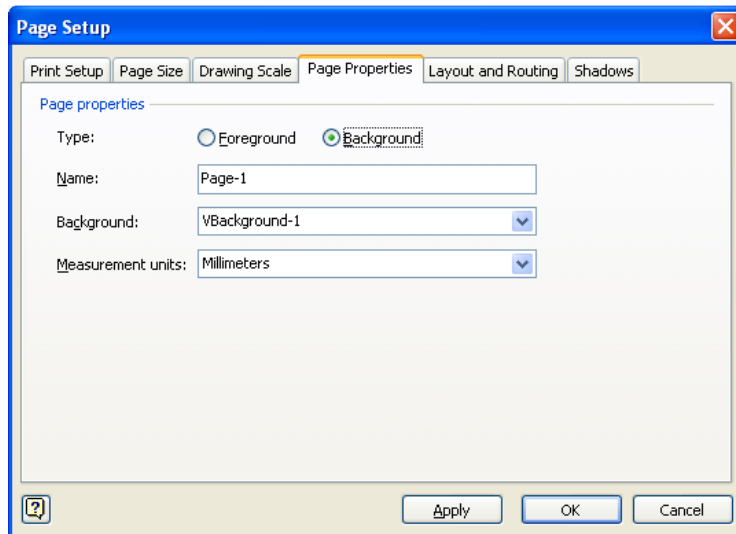
Use Background Pages to set unchanging items that need to be used on multiple Foreground Pages such as Titles, Logos etc.

- Insert Page
- Page Properties
- Type - Background
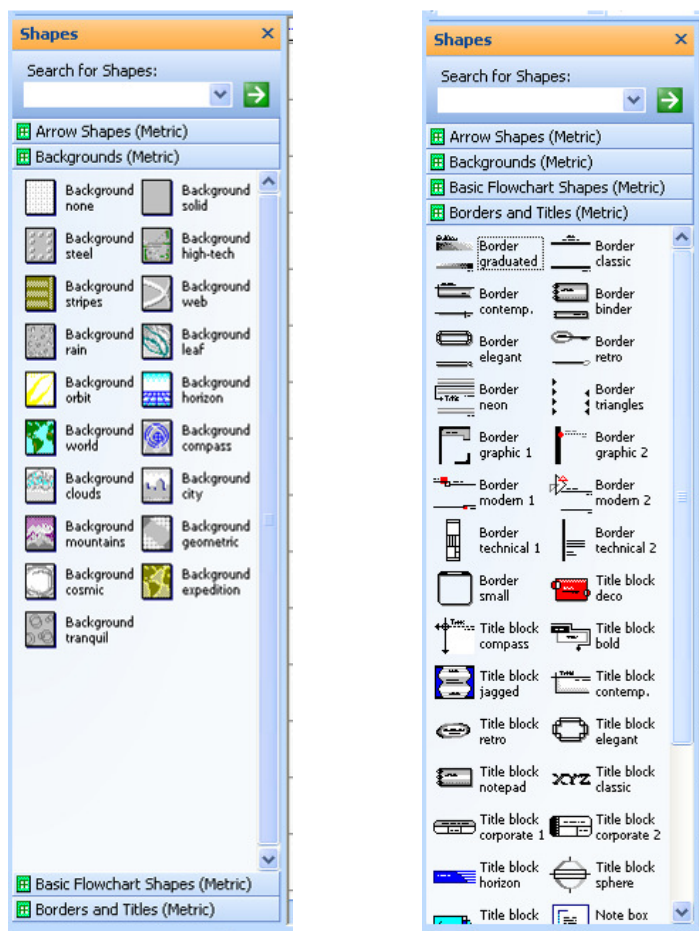
The Backgrounds and Borders and Titles Stencils are opened by default when a Built in Template is opened.

To create a Background Page simply:

- Select Background
- Drag and Drop over Foreground page

Do the same for Borders and Titles.

Inserting Headers and Footers
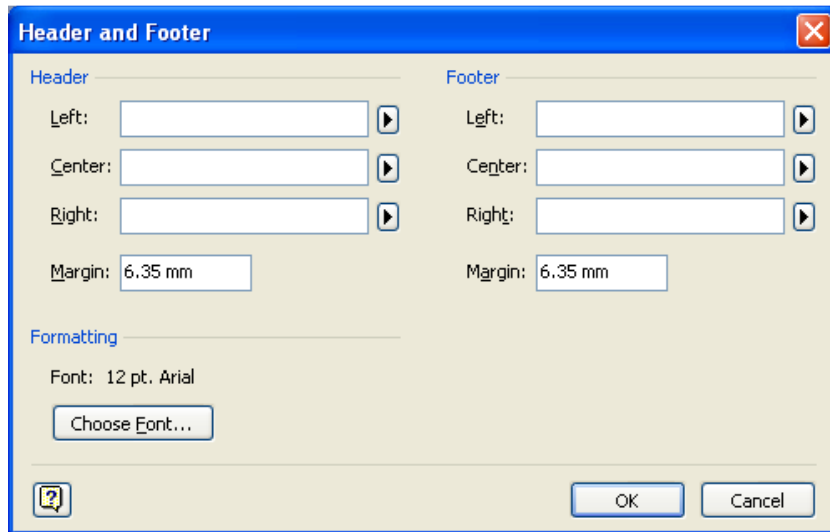
Header and Footers will appear at the top and bottom of all Foreground pages.

To apply a Header and Footer:

- View
- Header and Footer

Headers and Footers are only visible in Print Preview.

Go to Pages
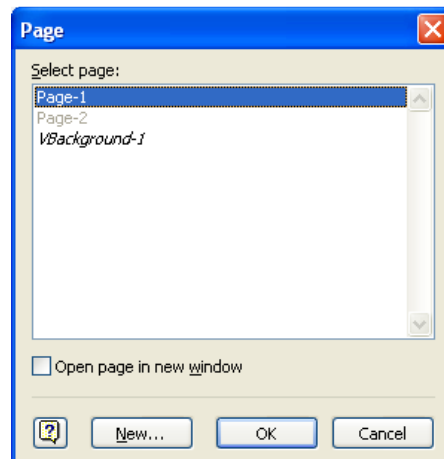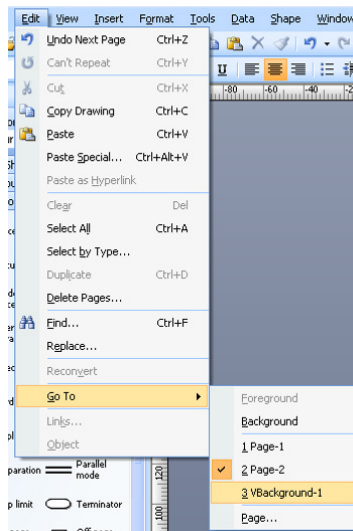
There is more than one way to Go To a Page.

- Edit
- Go To
- Page

This also contains an option to create a New Page.

or

- Edit
- Go To
- Select the desired page.

or use the Page Tabs at the bottom of the Drawing Area.

Building Diagrams

In this unit you will learn to create Organisation, Flow and Brainstorming Diagrams.

Objectives

Upon completion of this unit you will be able to:

- Create Organisation Charts
- Create Basic Flowcharts
- Create Brainstorming Diagrams

Rafle & Co Loss Adjusters

Thursday, January 15, 2009

Henry Ralfe
Owner

David Rafle
General Manager

Lee Hutson
Office Manager

Shani Hastings
Receptionist

Rhonda Perium
Receptionist

Jeff Pryde
Sales/Marketing
Manager

Tania Redden
Financial
Manager

Andrew Stanford
Sales

Susan Clark
Sales

Julia McMurray
Marketing

Richard Murphy
Adjuster's
Manager

Anthony Wicking
Accountant

Lara Hughes
Senior Adjuster
Burglary

Kerry Evans
Senior Adjuster
Motor

Brent Shepherd
Senior Adjuster
Building/Contents

Bill Murphy
Senior Adjuster
Liability

Andrea Burton
Claims Technician
Burglary

Graham Smith
Burglary Adjuster

Lyall Ohallorin
Motor Adjuster

Cynthia Curnow
Claims Technician
Motor

Paula Roche
Building/Contents
Adjuster

Emily Harrison
Claims Technician
Building/Contents

Tai Batchelor
Liability Adjuster

Kate Haynes
Claims Technician
Liability

Page 1

Creating Organisation Charts

Organisation Chart Shapes
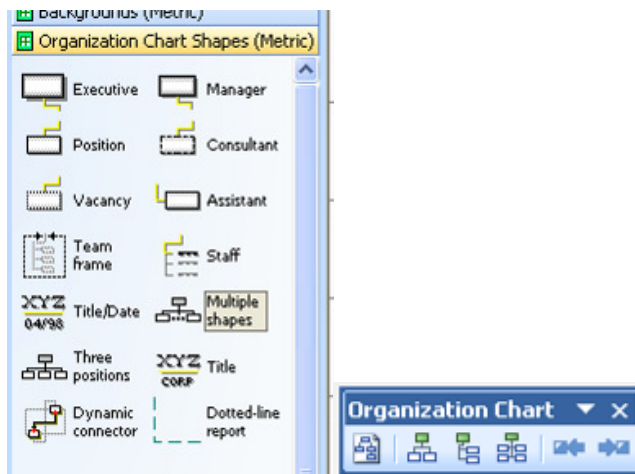
The Organisation Chart Shapes Stencil provides the shapes to create a chart.

The Organisation Chart Toolbar provides tools to change the layout and navigate around you Organisation Chart.

Adding Multiple Shapes
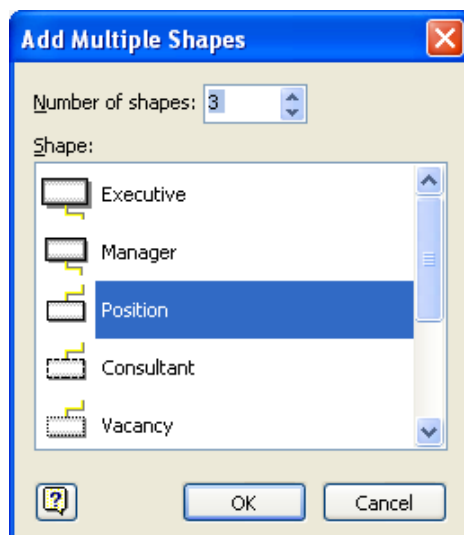
Use the Add Multiple Shapes tool on the Organization Chart Shapes Stencil to insert more than one shape at a time.

The maximum number of shapes that can be added at the same time is 50.

Notes

Changing Position Type

Arranging Subordinates
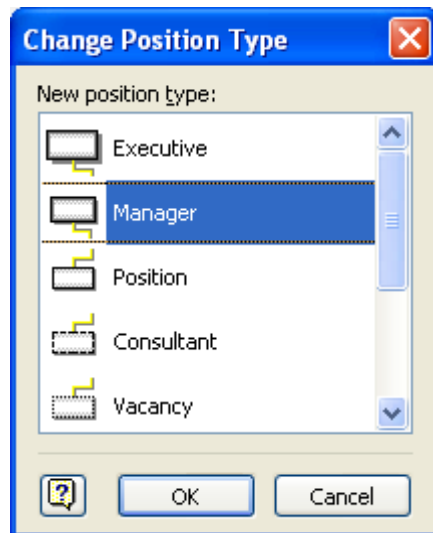
If a manager receives a promotion to executive, use the Change the Position dialogue box to reflect this promotion.

- Select shape
- Organization Chart menu
- Change Position Type Dialogue box
- Select New Position Type
- Click OK
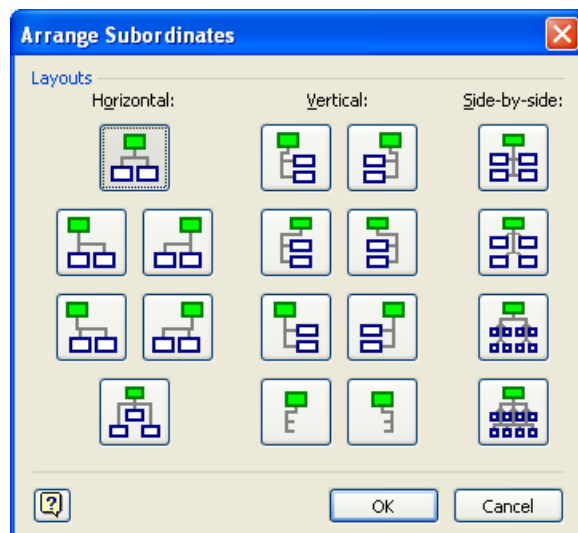
The Arrange Subordinates Dialogue box is used to change the layout of the Subordinate Shapes which allows the chart to better reflect the true nature of the organisation.

- Select the Manager Shape
- Organization Chart Menu
- Arrange Subordinates
- Select desired arrangement
- Click OK

Notes

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Need for change discovered

Change request form is submitted

Is the change complex or simple?

Simple

Complex

Roll back

Test the change, quantity risk and identify required resources

Develop documentation of change

Redesign the plan and retest for any changes

Review procedure to accomplish change

Assign resources, accept the level of risk satisfy schedule requirements, and deliver notifications

Deploy change, monitor progress, and measure success

Report success to management and technology conslutants

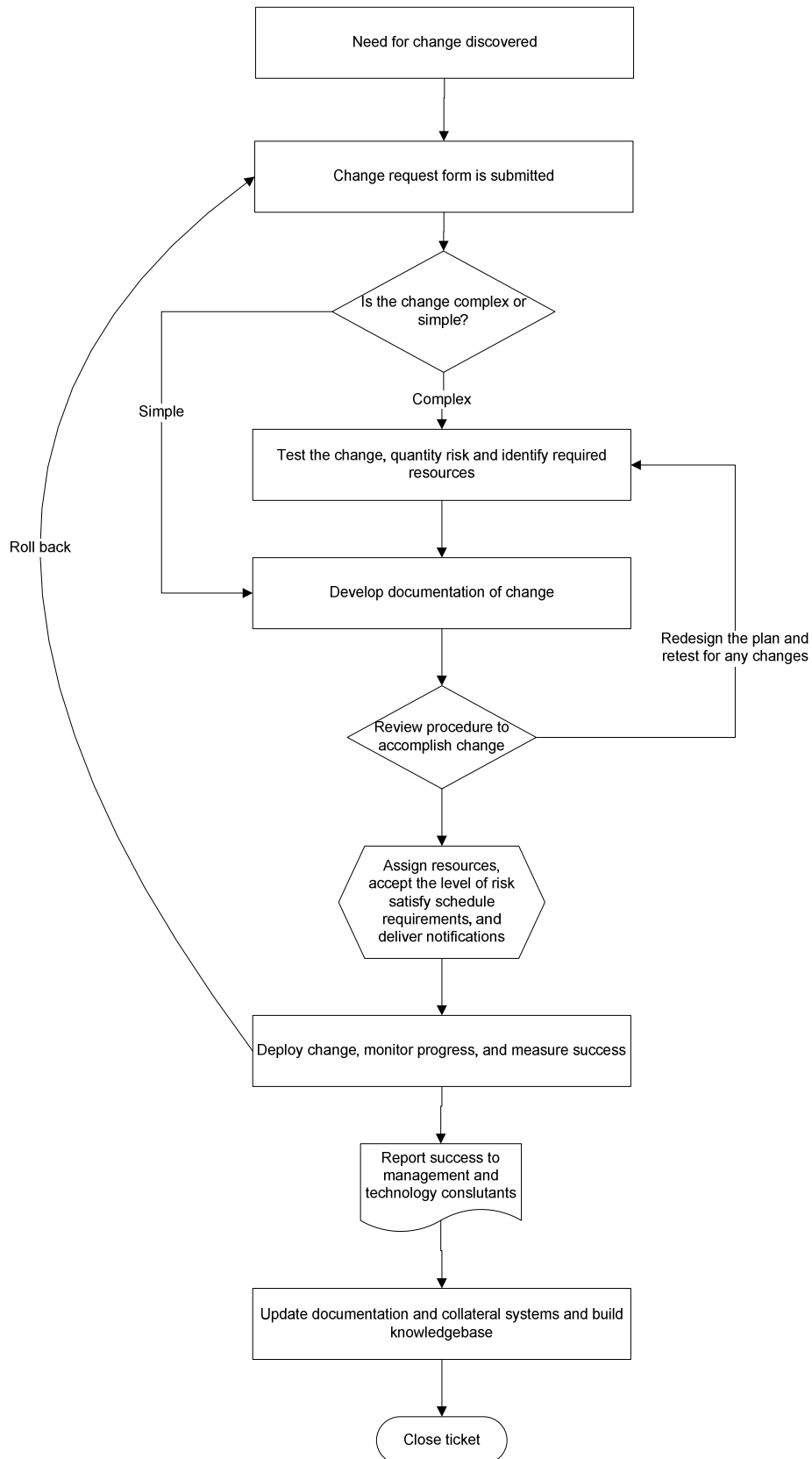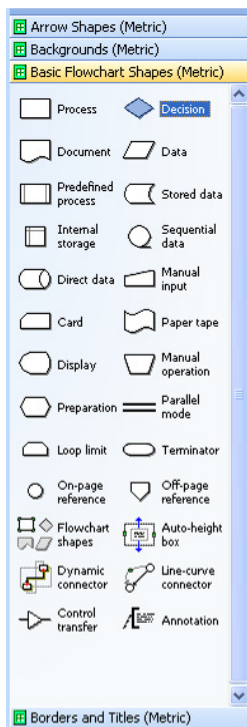Update documentation and collateral systems and build knowledgebase

Close ticket

Creating Basic Flowcharts

Basic Flowchart Shapes

There are many Flowchart Stencils. Using a combination of the skills learnt in the earlier units of this book creating Basic Flowcharts should be relatively simple.
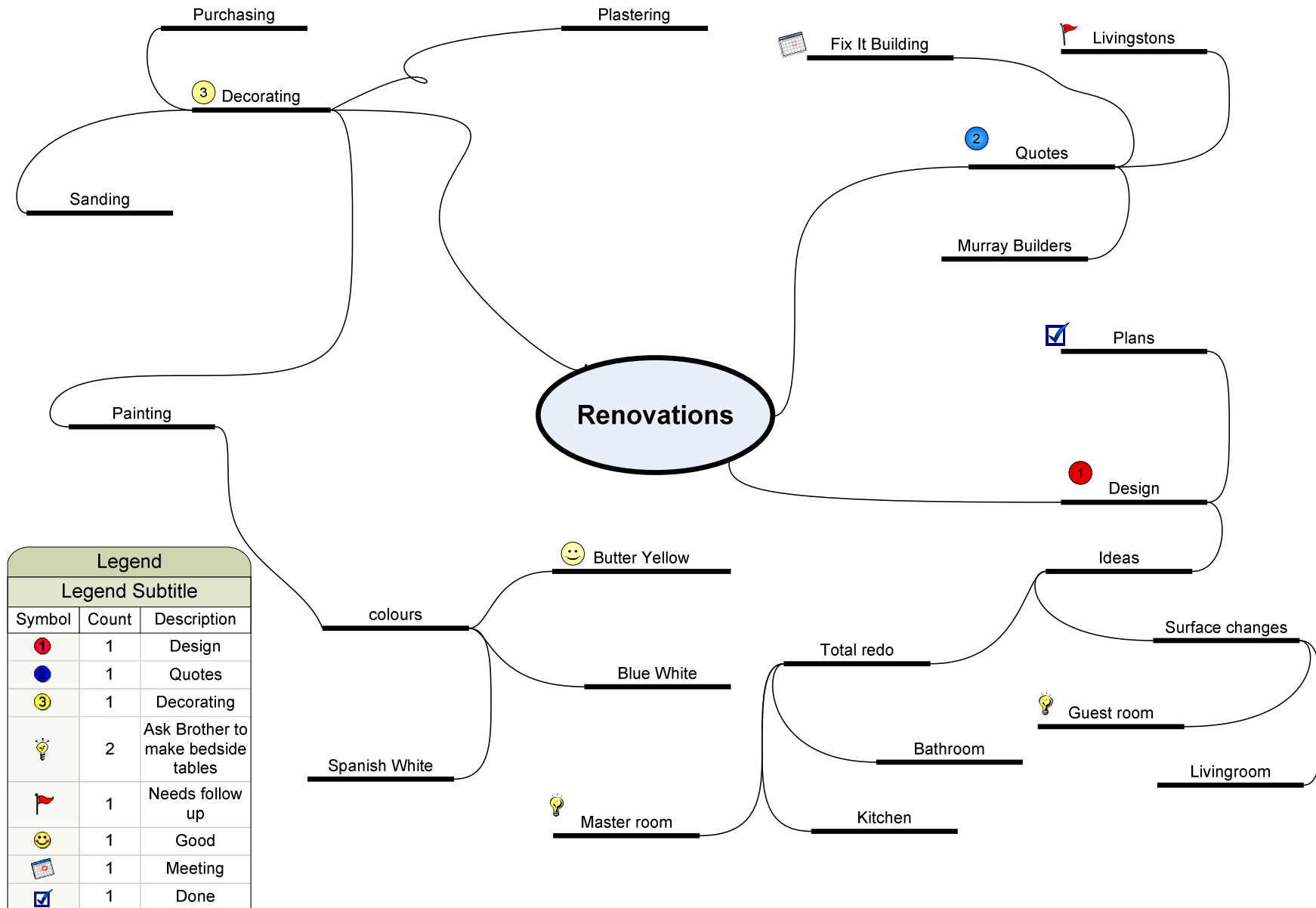
Notes

Purchasing

Plastering

Fix It Building

Livingstons

3 Decorating

2 Quotes

Sanding

Murray Builders

Plans

Painting

Renovations

1 Design

Ideas

Butter Yellow

colours

Surface changes

Total redo

Blue White

Guest room

Bathroom

Spanish White

Livingroom

Master room

Kitchen

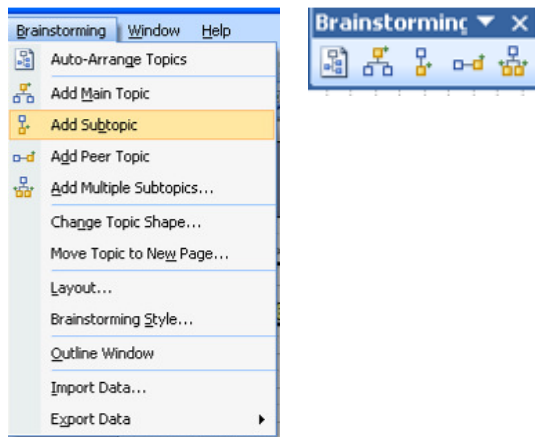| Legend		
Legend Subtitle		
Symbol	Count	Description
1	1	Design
2	1	Quotes
3	1	Decorating
	2	Ask Brother to make bedside tables
	1	Needs follow up
	1	Good
	1	Meeting
	1	Done

Creating Brainstorming Diagrams

The Brainstorming Menu and Toolbar

To add topics, change the layout and customise the Brainstorming Diagram use the Brainstorming Toolbar and Menu.

The Brainstorming Outline Window
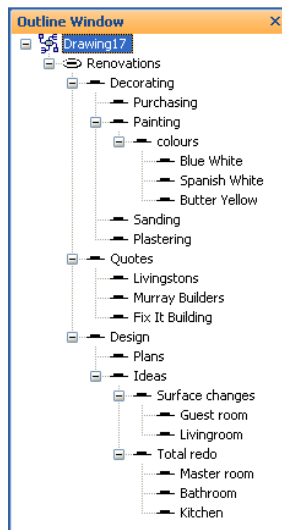
The Outline Window allows a tree overview of the Brainstorming Diagram and can be used to select levels to allow easy selection of topics.

- Select Brainstorming Menu
- Select Outline Window

Notes

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