

Microsoft Visio – Getting Started



Getting Started with Visio

When you start Visio, it displays the **Template categories** list. When you select a category, the group of predefined templates will be displayed in the main window. You can then choose the **Template** you wish to base your drawing on.

The screenshot shows the Microsoft Visio interface. On the left is the "Template Categories" pane with a tree view containing folders like "Getting Started", "Samples", "Business", "Engineering", "Flowchart", "General" (selected), "Maps and Floor Plans", "Network", "Schedule", and "Software and Database". The main area is titled "General" and shows "All Templates". Four templates are visible: "Basic Diagram" (selected), "Basic Flowchart", "Block Diagram", and "Block Diagram With Perspective". On the right, a detailed view of the "Basic Diagram Template" is shown, including a description: "Contains 2-D geometric shapes and directional lines for feedback loops and for functional decomposition, hierarchical, data structure, data flow block, and data block diagrams." Below the description are "Measurement Units" options: "US units" (unselected) and "Metric" (selected). A "Create" button is at the bottom.

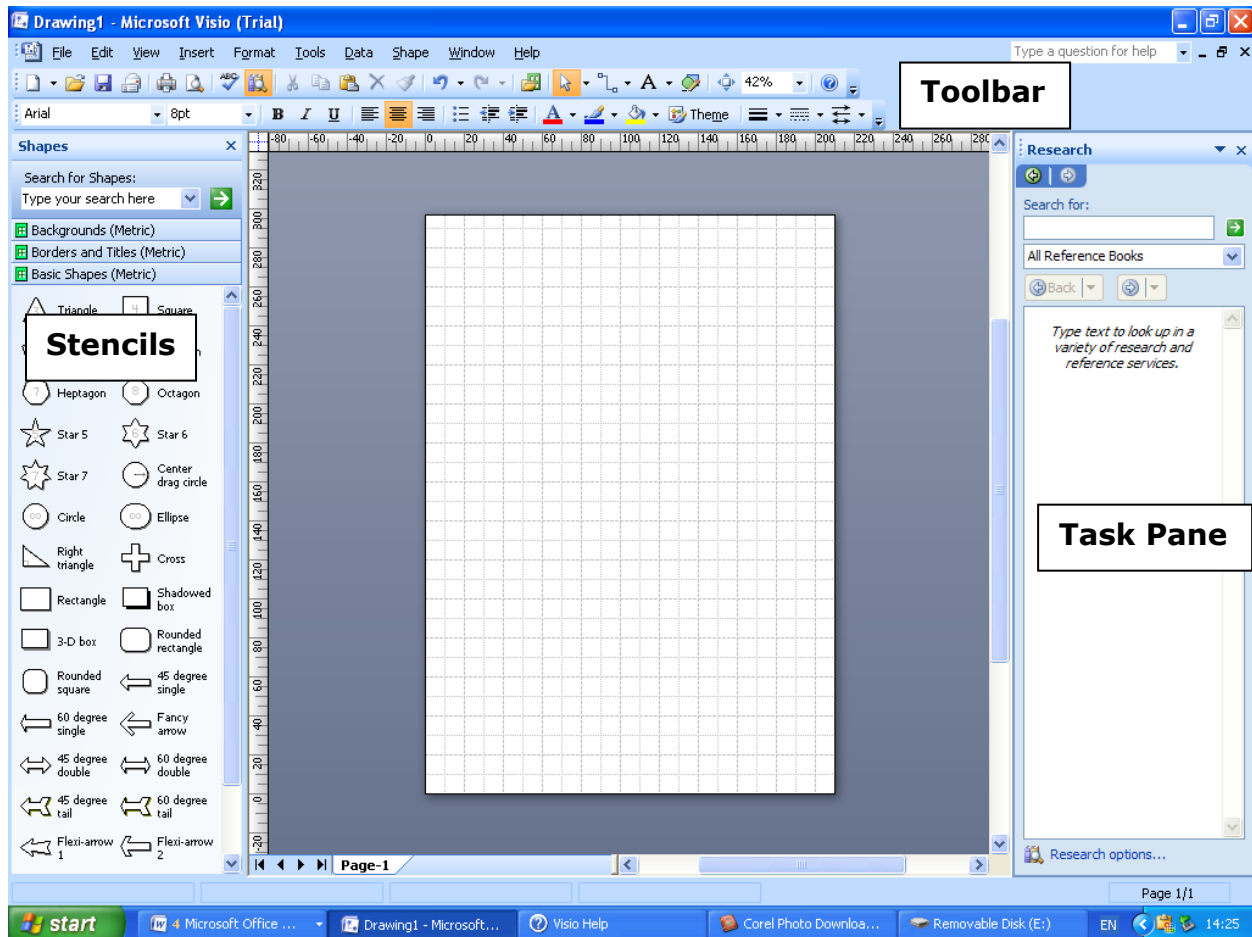
- Select the template you would like to use to see its description in the pane on the right hand side of the window.
- Choose your preferred measurement units
- Open the template you require by clicking on **Create** button.

Microsoft Visio – Getting Started

Visio Environment

Screen Layout

On the Visio screen you will notice a number of features that are similar to other Microsoft Office applications: Title Bar, Menu Bar, Standard and Formatting Toolbars and the Task Pane. You will also see the Stencils, which are particular to Visio.



















When Visio starts for the first time, the Standard and Formatting toolbars share one row on the screen, resulting in some of their icons being hidden from view. Similarly, the menus show most recently used commands first (only displaying the other commands after a short delay).

These settings can be reversed by choosing **Customize** from the **Tools** menu, then on the **Customize** tab ticking the two option boxes at the top ('**Show Standard & Formatting toolbars on two rows**' and '**Always show full menus**').








Microsoft Visio – Getting Started

Standard Toolbar











	New	To create a New drawing. The drop-down arrow can be used to select a Template.
	Open	To Open an existing drawing.
	Save	To Save the current drawing.
	E-mail	To E-mail the current drawing as an attachment.
	Print Page	To Print the current drawing.
	Print Preview	To Preview the current drawing.
	Spelling	To check the Spelling of all text in the current drawing.
	Research	To activate the Research task pane to enable you to search for information without the need to leave the Visio screen.
	Cut	To move data to the clipboard.
	Copy	To Copy data to the clipboard.
	Paste	To Paste data from the clipboard.
	Delete	To Delete the selected shape from the drawing page.
	Format Painter	To copy formatting from the current shape to others.
	Undo	To Undo the last action. The drop-down can be used to select as many as the last 20 actions.
	Redo	To Redo any actions that have been Undone. The drop-down can be used to Redo multiple actions.
	Shapes	To Open other stencils.

Microsoft Visio – Getting Started









	Pointer Tool	To revert the mouse pointer to Select mode. The drop-down gives access to Lasso and Multiple Select modes.
	Connector Tool	To draw Connectors between shapes. The drop-down gives access to the Connection Point Tool.
	Text Tool	To create Text Boxes. The drop-down gives access to the Text Block Tool.
	Drawing Tools	To activate the Drawing toolbar.
	AutoConnect	To automatically connect, evenly distribute, and accurately align shapes
	Zoom	To change the Zoom factor to be used on the current drawing.
	Help	To activate the Visio Help task pane.

Formatting Toolbar



	Font	To choose the Font type used for text.
	Font Size	To choose the Font size used for text.
	Bold	To apply Bold formatting to selected text, or all text within the selected shape.
	Italic	To apply Italic formatting to selected text, or all text within the selected shape.
	Underline	To apply Underline formatting to selected text, or all text within the selected shape.
	Align Left/Centre/Right	To Align text.
	Bullets	To bullet point the text within the shape
	Decrease indent	To decrease indentation of the text within the shape

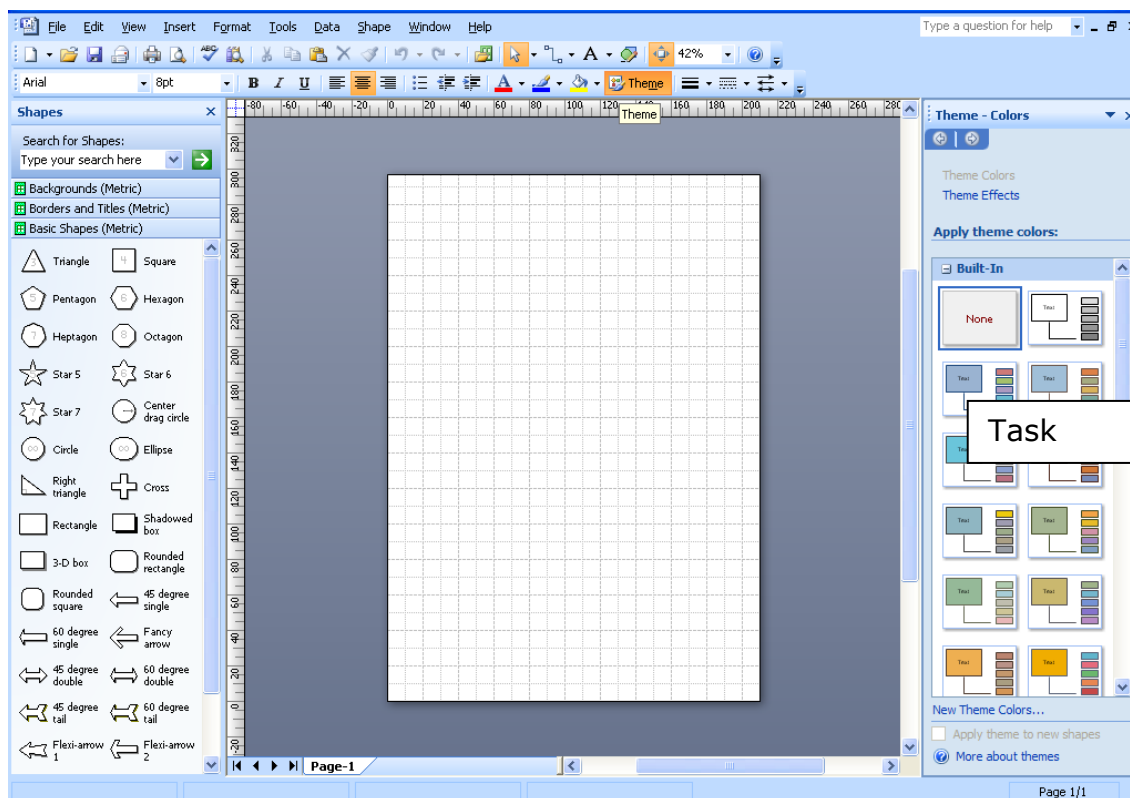
Microsoft Visio – Getting Started

	Increase indent	To increase indentation of the text within the shape
	Text Colour	To change the colour of selected text, or all text within the selected shape. The drop-down allows the choice of colour to be made.
	Line Colour	To change the Line (border) colour of the selected shape. The drop-down allows the choice of colour to be made
	Fill Colour	To change the Fill (inside) colour of the selected shape. The drop-down allows the choice of colour to be made
	Theme	To select set of colours and effects that can be applied to a drawing. Themes are a quick and easy way to give drawings a fresh and professionally designed look.
	Line Weight	To change the Line (border) weight of the selected shape. The drop-down allows the choice of weight to be made
	Line Pattern	To change the Line (border) pattern of the selected shape. The drop-down allows the choice of pattern to be made
	Line Ends	To add Line Ends (such as Arrow heads) to lines that have been drawn. This does not apply to shape borders.

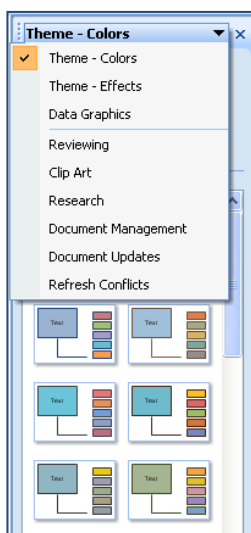
Microsoft Visio – Getting Started

Task Pane

The task pane is designed to make tasks simpler to perform by making their options more accessible.




You can switch between the different views of the task pane by clicking on the task pane name bar.

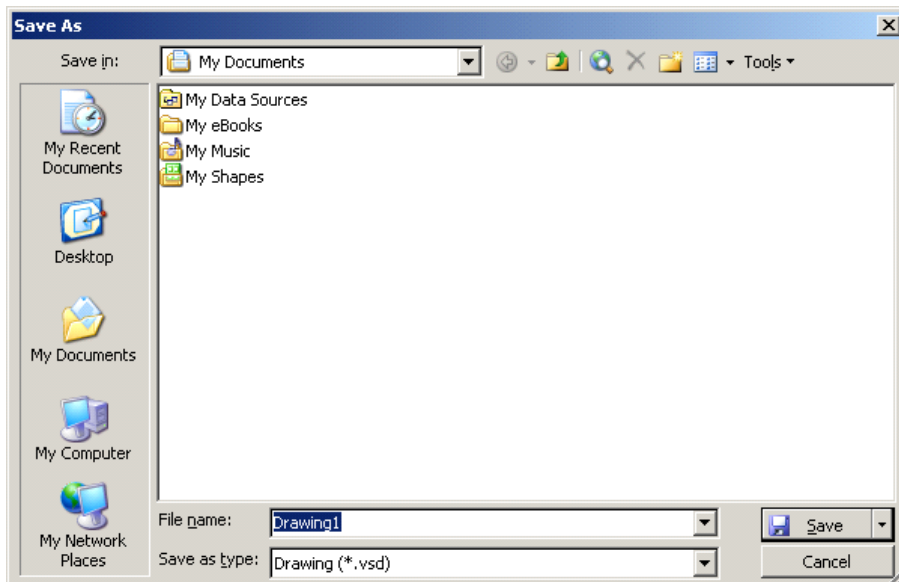


File Commands

Saving a File

To Save a File for the First Time

- Select **Save** from the **File** menu or click Save  on the standard toolbar – the **Save As** dialog box will appear.



- Type a name for the file.
- Change the directory and/or the drive if required.
- Leave the file with the extension **.vsd**
- Choose **Save**.

To Save an Existing File

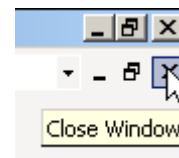
- Select **Save** from the **File** menu or click **Save** .

Closing a File

- Select **Close** from the **File** menu.

OR

- Click the Close Window icon in the top right of the screen



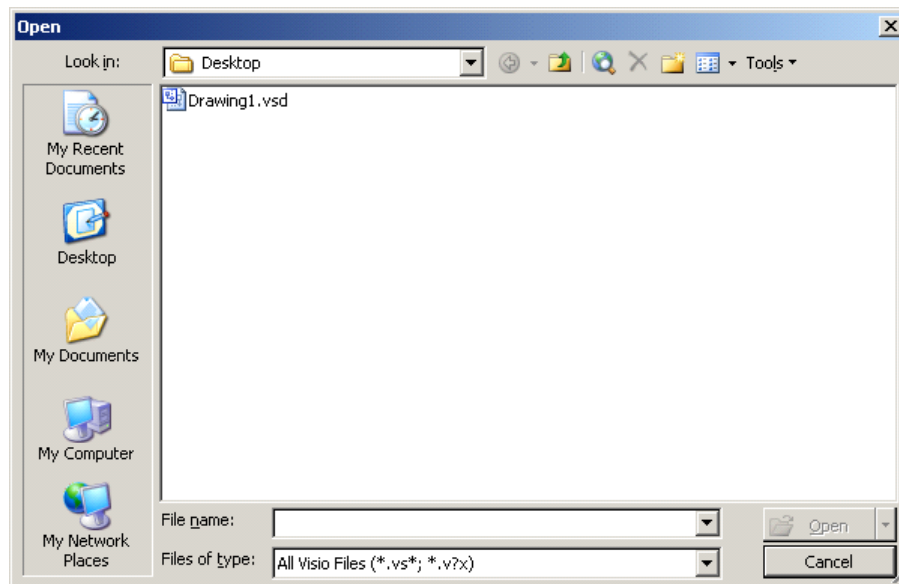
Microsoft Visio – Getting Started

Opening an Existing File

- Select **Open** from the **File** menu.

OR

- Click **Open** .
- The open dialog box will appear:



- Select the file you require.
- Choose **Open**.