**PAGE**
communication

Microsoft Visio 2016
Introduction
Course Notes

# CONTENTS

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# COURSE OBJECTIVES

By the end of this course you will be able to:

- Correctly create a new specified drawing, without reference to notes.

- Accurately set the language for a drawing, referring to notes if necessary.

- Correctly close a drawing and save changes, without reference to notes.

- Accurately create a new stencil to hold specified shapes, referring to notes if necessary.

- Briefly describe the Document Stencil and how it relates to a drawing.

- Briefly describe the difference between Dynamic and Static connectors.

- Correctly create a drawing using specified shapes and connectors, without reference to notes.

- Correctly edit a drawing and accurately format shapes and connectors as specified, referring to notes if necessary.

- Correctly add specified backgrounds to a drawing, without reference to notes.

- Briefly describe how to add and delete drawing pages.

- Briefly describe how to use presentation mode.

- Accurately set the scale of a drawing, referring to notes if necessary.

- Briefly describe how printing options can affect how much a drawing fits onto printer paper.

# MODULE 1 – INTRODUCTION

## *OBJECTIVES*

At the end of this section you will be able to:

- Correctly create a new specified drawing, without reference to notes.

- Accurately set the language for a drawing, referring to notes if necessary.

- Correctly close a drawing and save changes, without reference to notes.

## *WHAT IS VISIO?*

### *Using Microsoft Visio*

Visio is the diagramming solution offered by Microsoft Office. Business professionals can communicate ideas and processes using a variety of diagrams.

## *WORKING IN THE VISIO WINDOW*
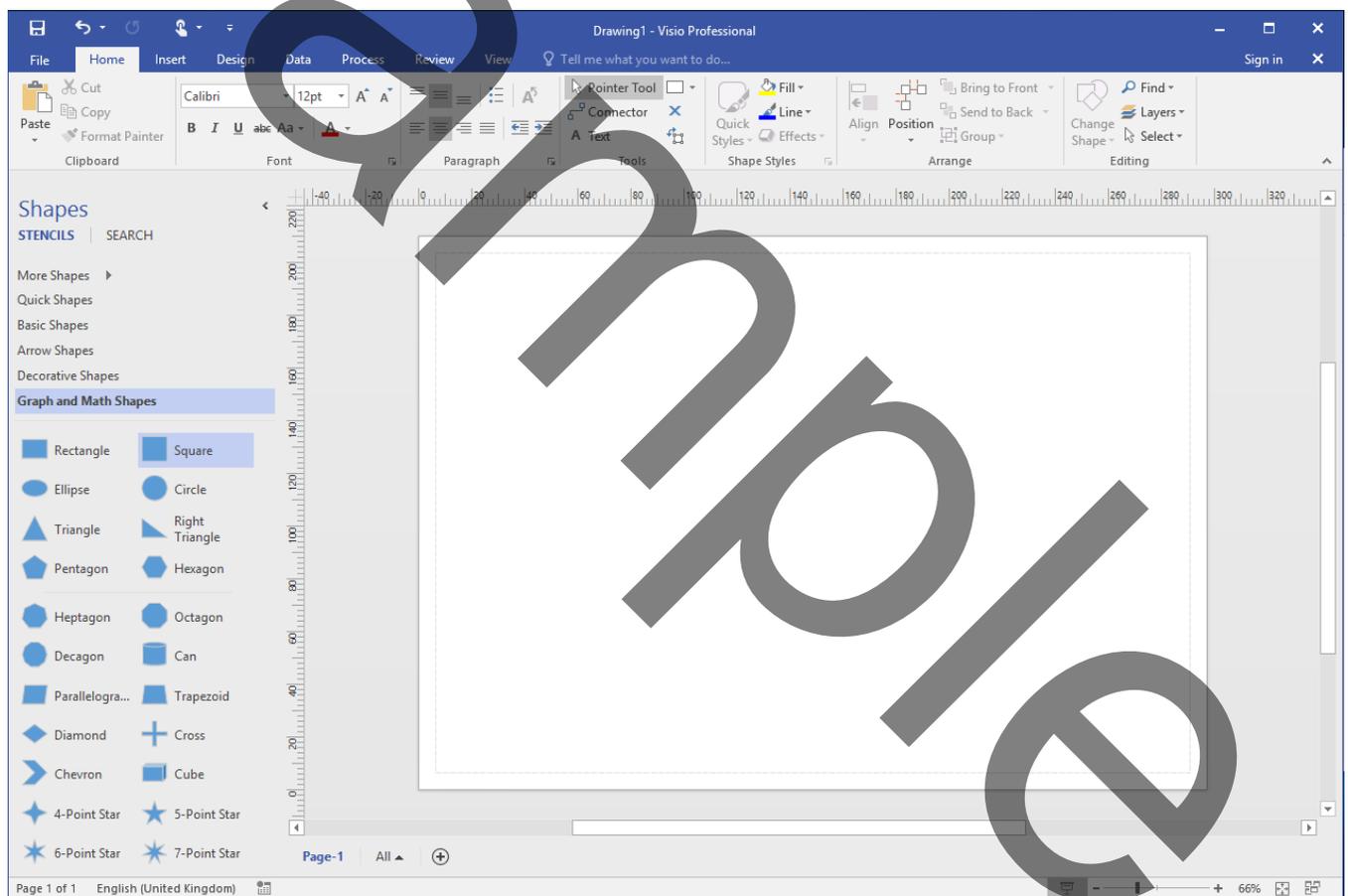


Apart from the Ribbon, the Visio window can be divided into two distinct areas:

- The Drawings Window is the main area where all work is performed.

- Shapes are panels that appear to the left of the Drawings Window.

### Using the Drawings Window

The Drawings Window is the main area where drawings and diagrams are created. The drawings window displays the printable drawing area.

### Using Shapes

Shapes (held in Stencils in the Shapes windows) are related to a drawing type and open automatically when a new drawing is created using a template. Visio offers a variety of stencils containing different shapes that can be used.

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## THE RIBBON

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The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as inserting something on the drawing or changing the overall design of the drawing. To reduce clutter, some tabs are context sensitive and are shown only when needed.

### To always keep the Ribbon minimized

1. Click on the **Collapse Ribbon** icon at the right-hand end of the ribbon, or, right-click anywhere on the Ribbon and select **Collapse the Ribbon**, or double-click the name of the active tab. Alternatively press Ctrl + F1.

2. To use the Ribbon while it is minimized, click on the tab you want to use, and then click the option or command you want to use.

### To restore the ribbon to permanent display

Click on any Ribbon tab to display the Ribbon then click on the *Pin* icon at the right-hand end of the Ribbon. Alternatively, double-click any tab again to restore the Ribbon, or right-click anywhere on the Ribbon and de-select **Collapse the Ribbon** (This will clear the tick next to this option). Alternatively press Ctrl + F1.

### Customising the Quick Access Toolbar

The Quick Access Toolbar is a customizable toolbar that contains a set of commands that are independent of the tab that is currently displayed. You can move the Quick Access Toolbar from one of the two possible locations, and you can add buttons that represent commands to the Quick Access Toolbar.

The Quick Access Toolbar can be located in one of two places - either in the upper-left corner above the **File tab**, or below the Ribbon.

### To move the Quick Access Toolbar

1. Click on the **Customize Quick Access Toolbar** button.

2. In the list, click on **Show Below the Ribbon** or **Show Above the Ribbon** as required.

You can add a command to the Quick Access Toolbar directly from commands that are displayed on the Ribbon.

### To add a command to the Quick Access Toolbar

1. Click on the **Customize Quick Access Toolbar** button.

2. On the Ribbon, click on the appropriate tab or group to display the command that you want to add to the Quick Access Toolbar.

3. Right-click on the required command, and select **Add to Quick Access Toolbar** on the shortcut menu.

*Notes:*

*You cannot increase the size of the buttons. The only way to increase the size of the buttons is to lower the screen resolution you use.*

*You cannot display the Quick Access Toolbar on multiple lines.*

*You can also customise the Quick Access Toolbar in a similar way to customising the Ribbon as detailed in the next steps. This customisation can also just apply to a specific document and is set using the top-right drop-down selector in the Options dialog.*

## Customising the Ribbon

The Ribbon is customizable also. You can create new tabs and also new groups both on the new tabs and in existing tabs. You can also add new buttons to new groups. You cannot delete any of the built-in tabs, groups or buttons. Buttons can only be added to custom groups, not to existing built-in groups.

### To add a new tab or new group to the Ribbon

1. Right-click anywhere on the Ribbon

2. Click on the **Customize the Ribbon…** option. The *Customize Ribbon* dialog is displayed.

3. The right-hand pane initially shows the Main tabs and the currently selected Ribbon tab will be expanded in the pane to show the various groups. Click on any of the + signs to expand the display and give more detail. To view the other available tabs that can be customised click on the drop-down selector above the right-hand pane and choose *All Tabs* or *Tool Tabs* as required.

4. Do one or more of the following:

- To create a new tab, click on the **New Tab** button below the right-hand pane. The new tab will be inserted below the currently selected tab, together with a default empty new group.

- To create a new group, click on the **New Group** button below the right-hand pane. The new group will inserted at the end of the existing groups in the currently selected tab.
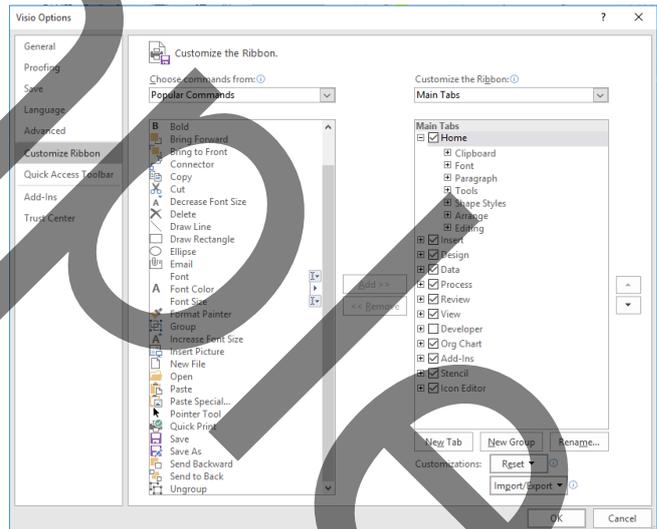
*Note: To reposition the tab/group click on the tab/group then use the up and down arrows to the right of the right-hand pane to reposition, while the tab/group name is selected.*

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### To rename a new tab or group

1.  Right-click anywhere on the Ribbon

2.  Click on the **Customize the Ribbon…** option. The *Customize Ribbon* dialog is displayed.

3.  Select the tab or group entry in the right-hand pane.

4.  The *Rename* dialog is displayed as shown here. Type a new name in the *Display name* box at the bottom.

5.  If you want the button to have an associated icon, choose one by clicking on one from the displayed *Symbol* collection.

6.  Finally, click on **OK**.
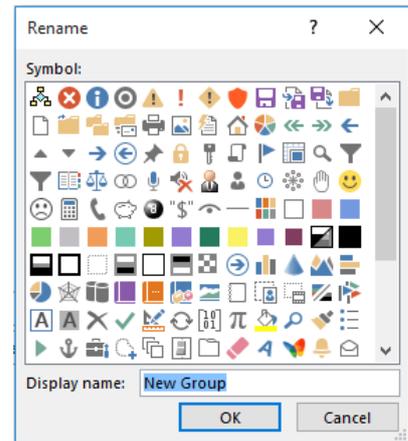
### To add a new button to a group

1.  Right-click anywhere on the Ribbon

2.  Click on the **Customize the Ribbon…** option. The *Customize Ribbon* dialog is displayed.

3.  In the right-hand pane, right-click on the tab and group that will hold the button.

4.  In the left-hand pane select the button that you wish to add.

5.  Click on the **Add>>** button.

*Note: To reposition the button use the up and down arrows at the side of the right-hand pane while the added button is selected in the right-hand pane.*

### To delete a previously created tab, group or button.

1.  Right-click anywhere on the Ribbon

2.  Click on the **Customize the Ribbon…** option. The *Customize Ribbon* dialog is displayed.

3.  In the right-hand pane, click on the tab, group or button to delete.

4.  Click on the **<<Remove** button.

### To reset ribbon customisations

1.  Right-click anywhere on the Ribbon

2.  Click on the **Customize the Ribbon…** option. The *Customize Ribbon* dialog is displayed.

3.  Click on the rest button below the right-hand pane, and choose **Reset All Customisations** or **Reset Only Selected Ribbon Tab** as required.
    *Note: **Reset Only Selected Ribbon Tab** is only available when you are looking at a built-in tab that has been customised by having new buttons or groups inserted.*

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## BACKSTAGE VIEW

The Ribbon contains the set of commands for working *in* a drawing, while the Office Backstage view is the set of commands you use to do things *to* a drawing.

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Open a drawing, and click on the **File** tab to see the Backstage view. The Backstage view is where you manage your drawings and related data about them - create, save, and send drawings, look at drawings for properties or personal information and more.

Either click on the backstage **Back** button,  or press ⌊Esc⌋ on your keyboard to close Backstage view.

## *OPENING DRAWINGS AND CREATING A NEW DRAWING*

When Visio first starts it presents you with the backstage area showing recent files that have been opened. This display shows recent files opened in the blue area on the left and also various templates and categories of drawing types and their corresponding templates.
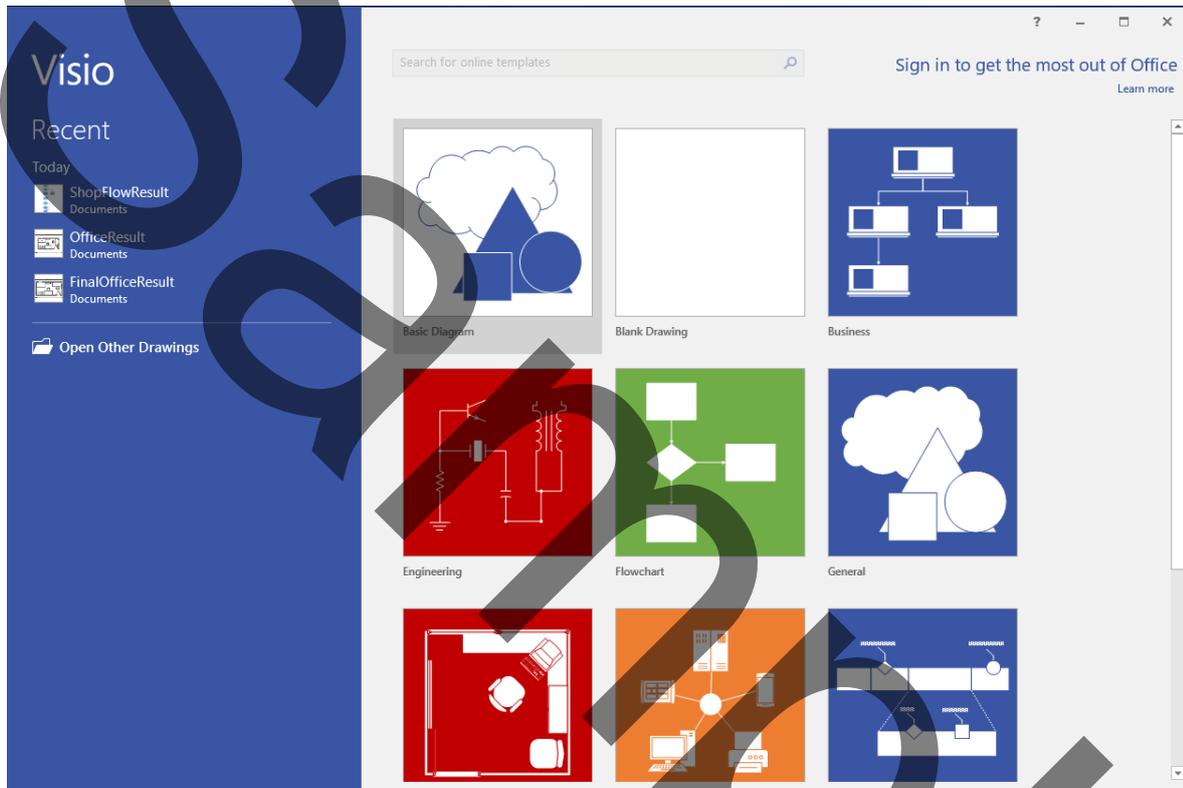


### *To create a new drawing from a Template*

1.  If you have just started Visio, then click on **Categories** at the top of the right-hand area. If you are running Visio looking at another drawing, then Click on the **File** tab**,** and click on New. Then click on **Categories** at the top of the right-hand area.

2.  In the *Category* list, select the category of drawing you want to create.

3.  In the displayed category, select the type of drawing you want to create.

*Note: Most templates use English(United States) as the default language even though your Office language is set to English(United Kingdom). The drawing language can be changed as detailed below.*

# EXERCISE 1

1. Start Visio.
2. Now create a new drawing based on the *Basic Diagram* template in the *Block Diagrams* category.
3. Set the Language of this new drawing to English (U.K.)
4. In the shapes window drag a triangle on to the page.
5. Close the drawing and save it with the name **Ex1**
6. Using *File, Open, Computer, Browse* select the **DemoClassroom** drawing and use the drop-down selector of the Open button to open it as a copy. This protects the original from being overwritten.
7. Click on the *Save* button and call this drawing **MyDemo**.
8. Close this new drawing.

1. Create a new shape stencil.
2. Open the Basic Flowchart Shapes stencil (found under **More Shapes, Flowchart**).
3. Add the *Process* and *Decision* Shapes to the new stencil.
4. Save the new stencil with the name **DemoStencil**.