

CHAPTER 1

InFocus

GETTING TO KNOW VISIO 2013

Microsoft Visio 2013 is a graphical and drawing application that helps you to visualise and communicate complex information. With Visio, you can transform complicated text and tables that are hard to understand into attractive and professional-looking diagrams that communicate information at a glance.

Visio provides modern shapes and templates for a diverse range of diagramming needs, such as organisational charts, network diagrams, floor plans and home plans, electrical diagrams, brainstorming diagrams, process modelling, user interface design, and more.

In this session you will:

- ✓ learn how to start **Microsoft Visio 2013**
- ✓ gain an understanding of the **Visio Start Screen**
- ✓ learn how to create a new drawing from a template
- ✓ gain an understanding of the **Visio** screen
- ✓ gain an understanding of how **Microsoft Visio 2013** works
- ✓ learn how to use the ribbon
- ✓ learn how to minimise and expand the ribbon
- ✓ gain an understanding of **Backstage View** in **Visio**
- ✓ learn how to access the **Backstage View**
- ✓ learn how to use shortcut menus
- ✓ gain an understanding of how dialog boxes work
- ✓ learn how to launch a dialog box
- ✓ gain an understanding of the **Quick Access Toolbar**
- ✓ learn how to add commands to the **Quick Access Toolbar**
- ✓ gain an understanding of the status bar
- ✓ learn how to customise the status bar
- ✓ learn how to save a new drawing
- ✓ learn how to exit correctly and safely from **Microsoft Visio 2013**.

STARTING VISIO IN WINDOWS 8

To create a new drawing or edit an existing one, the first thing you must do is start **Microsoft Visio**. **Windows 8** provides a number of ways of doing this. You can **Search** for **Visio** via the **All**

apps screen or simply type **visio** into the **Start** screen. If a **Visio** tile is pinned to your **Start** screen, you can start **Visio** by clicking on the tile.

Try This Yourself:

*Before you begin, ensure your computer is switched on and the **Windows Start** screen is displayed...*


- 1 Right-click anywhere on the **Windows Start** screen to display the **App bar** at the bottom of the screen

- 2 Click on **All apps** in the **App bar** to display the **All apps** screen

From here you can view all your apps, including Visio...

- 3 If necessary click on the scroll button at the bottom right of the screen until you see the **Microsoft Office 2013** apps, then click **Visio** to open the program

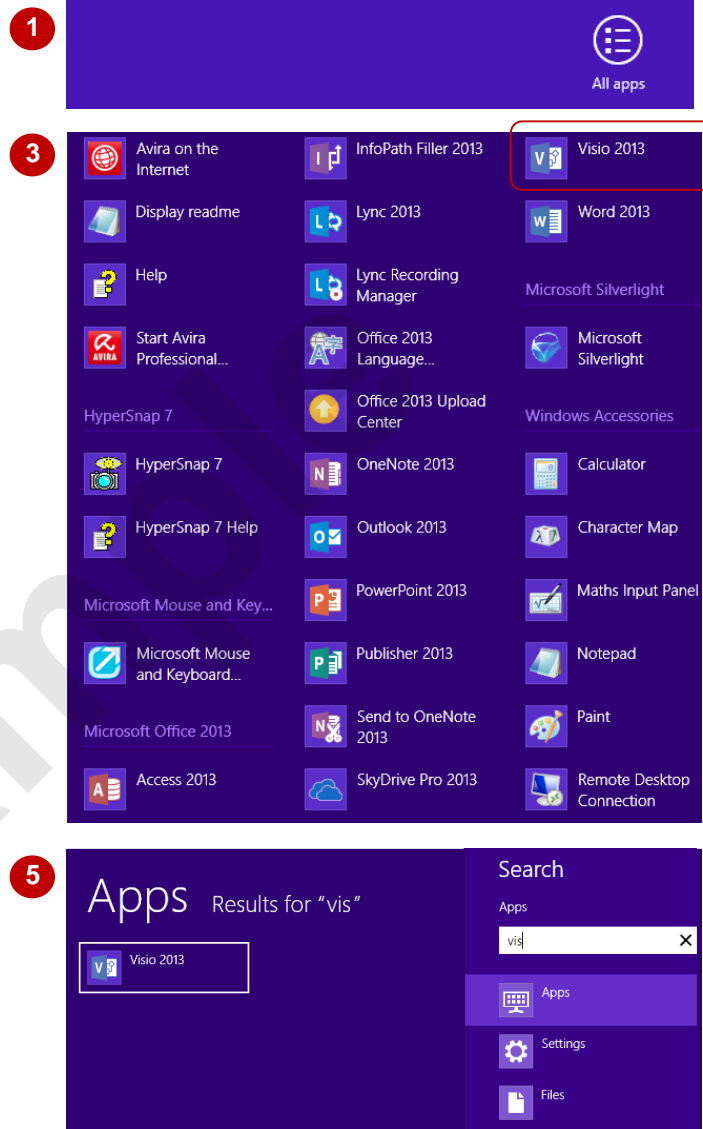
There is a faster way to open Visio...

- 4 Press the **Windows** key  to return to the **Windows Start** screen

- 5 Begin typing **visio** into the **Windows Start** screen

A Search pane will appear on the right side of the screen and Visio 2013 will display under Results...

- 6 Click on **Visio 2013** to open the program with the Visio **Start** screen displayed



If your Computer uses Windows 7, you have to use a different method to start Visio as Windows 7 doesn't have a Start screen. Instead click on the Windows Start button (it has the Windows logo on it), click on All Programs, click on Microsoft Office then click on Microsoft Visio 2013.

For Your Reference...

To **start Visio** in **Windows 8**:

- Display the **All apps** screen and click on **Visio 2013**, or
- Type **visio** into the **Windows Start** screen and click on **Visio 2013** under **Results**, or
- Click on the **Visio 2013** tile on the **Windows Start** screen

Handy to Know...

- You can add a **Visio** tile to the **Start** screen by right-clicking on **Visio 2013** on the **Apps** screen and clicking on **Pin to Start**. You can also add a Visio icon to the taskbar, which allows you to start Visio from the desktop, by right-clicking on **Visio 2013** on the **Apps** screen and clicking on **Pin to taskbar**.

UNDERSTANDING THE START SCREEN

Most times when you open Visio, a **start** screen will display. From this initial screen, you can choose what kind of drawing you want to work with. You can choose to work with one of your

most recently accessed drawings, browse to open a drawing that has been saved to **Computer** or **SkyDrive**, or create a new drawing using the available templates.

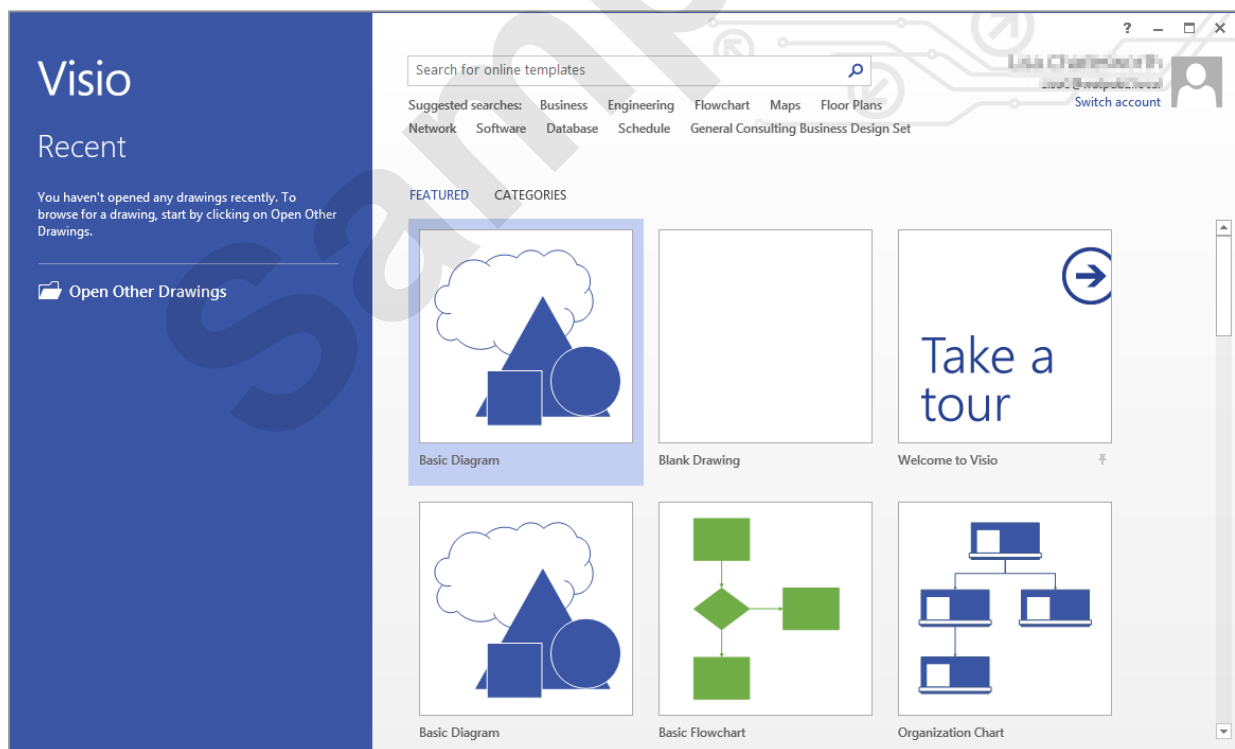
Microsoft Visio 2013 Start Screen

The Microsoft Visio 2013 **start** screen is very helpful if you want to quickly access drawings that you have worked on recently or create a new drawing based on one of the available templates.

As you work on drawings in Visio, they will be added to the **Recent** list in the blue pane to the left of the screen. If you haven't opened any drawings (like in our example below), you can browse for existing drawings on your computer or SkyDrive by clicking on the link, **Open Other Drawings**, located below **Recent**.

The main pane of the Visio **start** screen displays available templates that you can use to create a new drawing and a search box that you can use to search the internet for additional templates. Templates are simply layouts that have already been created, complete with stencils of shapes that you can use to quickly create your diagrams.

Numerous templates appear on the **FEATURED** tab of the **start** screen. These include popular examples of the types of drawings you can create in Visio – organisation chart, floor plan, data flow diagram, etc.). But you can access many other templates by clicking on the **CATEGORIES** tab under **Suggested searches** near the top of the pane. Here the templates are grouped into eight categories such as **Flowchart**, **Business**, **Network** and so on, and by clicking on a specific category, you can access all available templates for that category.



The **start** screen will only display when you launch the **Visio 2013** application directly – that is, by clicking on the Visio tile on the **Windows 8 Start** screen, clicking on the application on the **Apps** screen or under search results, or clicking on the taskbar icon if the application has been pinned to the desktop **Taskbar**.

Visio 2013 can also be started in **Windows 8** by double-clicking on a Visio drawing in the **File Explorer**. When this occurs **Visio 2013** will start with the drawing open on the screen and the **start** screen shown above will be bypassed.

CREATING A NEW DRAWING FROM A TEMPLATE

All new drawings in Microsoft Visio are based on a **template**. Visio includes more than 60 built-in templates that you can choose from. These templates are grouped into categories (e.g.

Schedule, Software and Database, etc.) and each template is accompanied by one or more stencils. A **stencil** is a collection of shapes designed specifically for different types of drawings.

Try This Yourself:

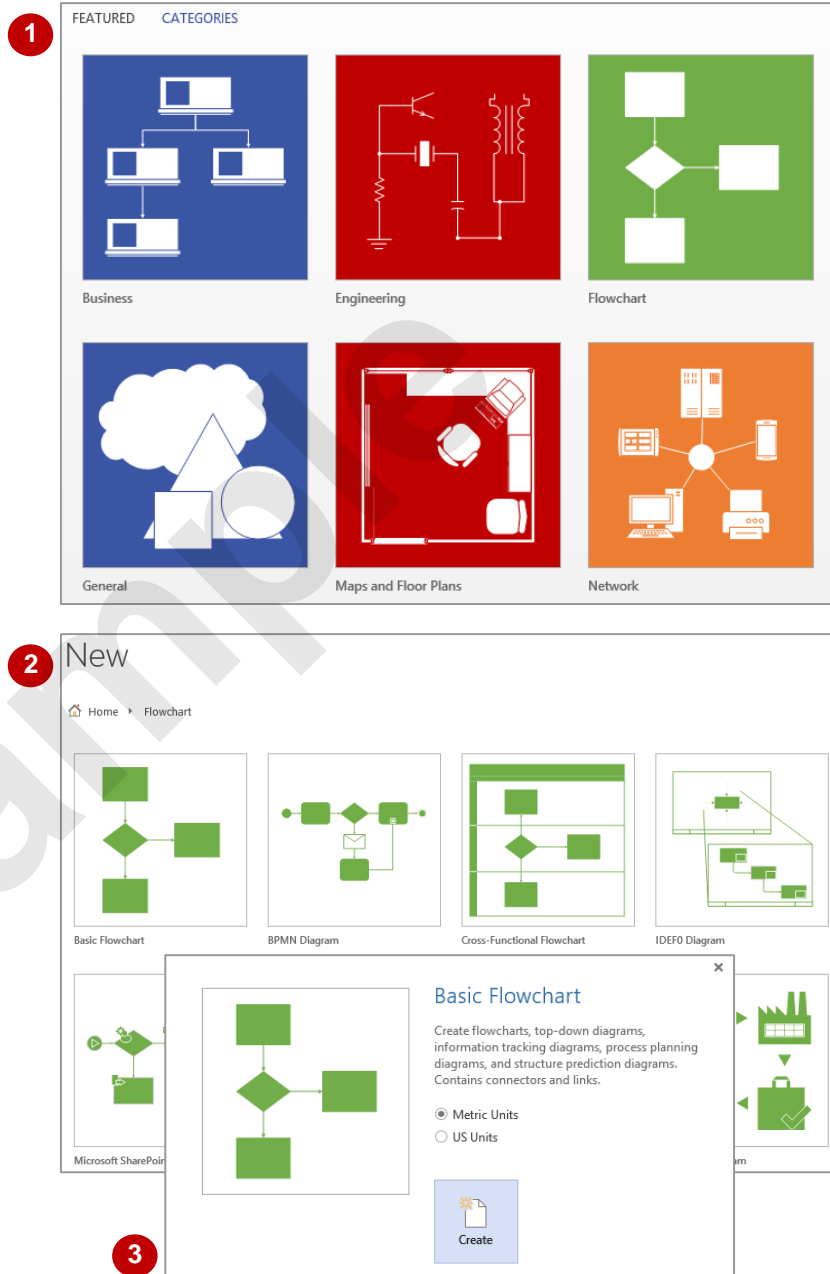
Before starting this exercise, ensure Visio has started and the Visio Start screen is displayed...

- 1 Click on the **CATEGORIES** tab under the search box to display available categories of templates
Let's assume we want to create a basic flowchart...

- 2 Click on **Flowchart**
We have nine templates to choose from...

- 3 Click on **Basic Flowchart**
A pane showing a summary of what you'd use a flowchart for and what is included will appear...

- 4 Ensure **Metric Units** is selected, then click on **[Create]**
A blank drawing will be created and the Basic Flowchart Shapes stencil will appear in the Shapes window to the left of the screen



For Your Reference...

To **create** a **blank drawing** from a **template**:

1. Click on the **FILE** tab and click on **New**
2. Click on a template under **FEATURED**, or Click on **CATEGORIES**, click on the desired category and click on the template
3. Click on **[Create]**

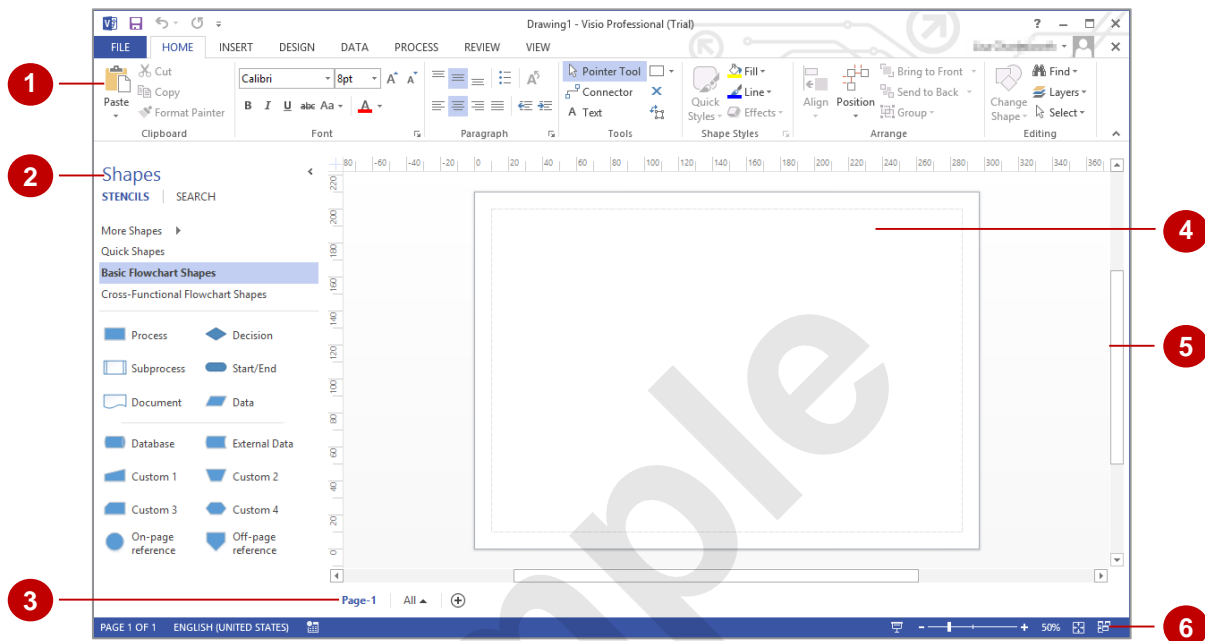
Handy to Know...

- To open a new, blank drawing that isn't based on any template, click on the **Blank Drawing** template on the **FEATURED** tab.

THE VISIO SCREEN

The **Microsoft Visio 2013 screen** may appear cluttered and overwhelming at first glance. There are, however, three key areas within the screen. These include the ribbon at the top of the screen,

the drawing page occupying the majority of the screen and the **Shapes** window situated to the left of the drawing page. These areas are examined more closely below.



- 1 The **ribbon** is the tabbed band that appears across the top of the window. It is the control centre of Visio 2013. You use the **tabs** on the ribbon to access the **commands** that have been categorised into **groups**. The commands include **galleries** of options that you can select from.

The **FILE** tab on the ribbon is used to access the **Backstage view** which contains file management functions, such as saving, opening, closing, printing, sharing, and so on. *Visio Options* are also available so that you can set your working preferences and options for Visio 2013.

- 2 The **Shapes window** displays the stencils that are currently open for the drawing. **Stencils** are palettes of shapes that you can use to create a drawing. The stencils that appear in the **Shapes** window depend on the template on which the drawing is based. For example, the drawing in the sample above was based on the **Basic Flowchart** template and by default, two stencils open for this template: **Basic Flowchart Shapes** (which is open in the **Shapes** window above) and **Cross-Functional Flowchart Shapes**. The **Quick Shapes** stencil is always open in the **Shapes** window. The title bars for the available stencils are listed at the top of the **Shapes** window. Click on a title bar to see the shapes in the stencil.

Clicking on **More Shapes** near the top of the **Shapes** window displays an extensive stencil menu from which you can open and create stencils, search for specific shapes and more.

- 3 A drawing can comprise more than one page and the **page tabs** let you swap between pages. If your drawing comprises a large number of pages, clicking on **All** displays all pages and then you can click on the desired page number. You can add a new page by clicking on the **Insert Page** plus icon, located immediately to the right of the page tabs.
- 4 The **drawing page area** is used to construct your drawing. You can zoom in and out of the page area and set the page dimensions to match the paper size you require.
- 5 The **scroll bar** indicates your current position in the page. It lets you move to other positions in the page by clicking or dragging. The arrows can also be used to move up and down the page.
- 6 The **status bar** appears across the bottom of the window. It displays quite a few options in its default state including page number, language, height, width, angle, macro recorder, access to **Presentation** mode, fit page to current window, switch windows, and zoom commands such as the zoom slider.

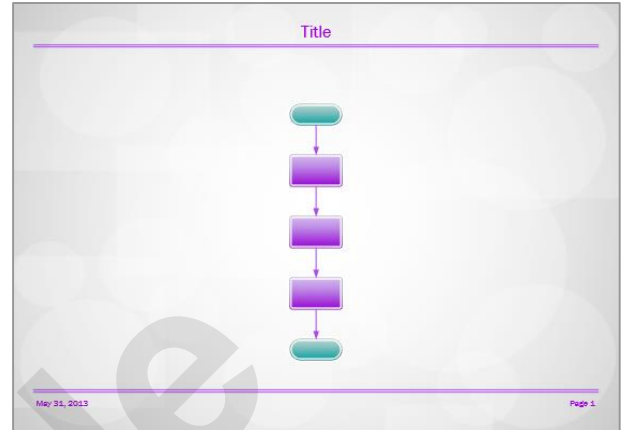
How MICROSOFT VISIO 2013 WORKS

The Visio 2013 screen comprises three key areas. The drawing you create is placed on a **drawing page**. The data can be manipulated using commands on the **ribbon**. The drawing

page is part of a larger entity, known as a file, and everything that you do to the file is controlled in **Backstage view**. These key components are described on this page.

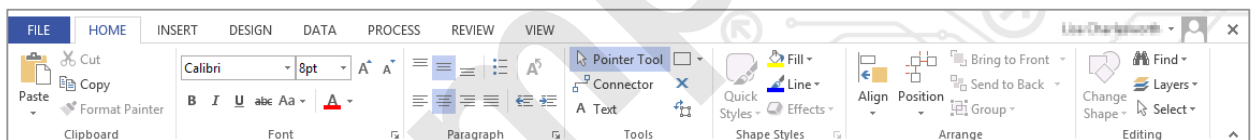
The Drawing Page

You can create a new drawing based on a template. When you select a template, a new blank drawing page will open. The stencils, containing the appropriate shapes for the template, will also open. By dragging the shapes onto the page, you can create a drawing, such as the sample flow chart shown to the right.



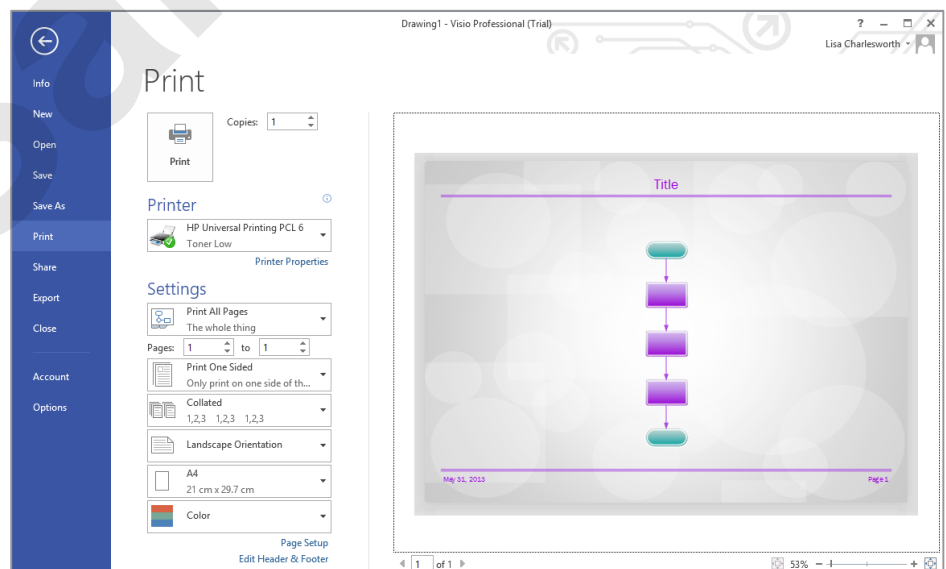
The Ribbon

When you need to do something to the page or to a shape on the page, such as insert an image or format the selected shape, you'll find all of the relevant commands on the **ribbon**. The ribbon has the commands organised thematically using a series of tabs across the top.



Backstage View

When you want to do something with your drawing such as save it so that you can access it again later, preview it, print it, send it to your boss, or whatever, you will need to access the **Backstage view** of Visio. **Backstage view** is accessed using the **FILE** tab on the ribbon. Rather than offering you commands on a ribbon, the **Backstage** occupies the entire screen and has a series of options down the left side. In our sample to the right, the **Print** option is active, and that is why you can see a series of print options and a print preview pane on the right side of the **Backstage view**.



USING THE RIBBON

The **ribbon** is the command centre for Visio. It provides a series of **commands** organised into **groups** that are placed on relevant **tabs**. Tabs are activated by clicking on their name to display

the command groups. **Commands** are activated by clicking on a button, tool or gallery option. Everything you could possibly want to do in Visio will be found somewhere on this ribbon.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open...

- 1 Examine the **groups** on the **HOME** tab

These are the most commonly used commands...

- 2 Click on the **INSERT** tab
The commands on this tab are used to create pages and insert items such as illustrations, diagram parts and text objects...

- 3 Click on **Container** in the **Diagram Parts** group to display the **Container** gallery

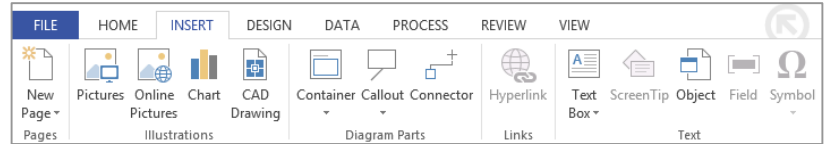
This includes 14 containers that you can use to place around selected shapes in the diagram...

- 4 Click on each of the tabs and examine the commands

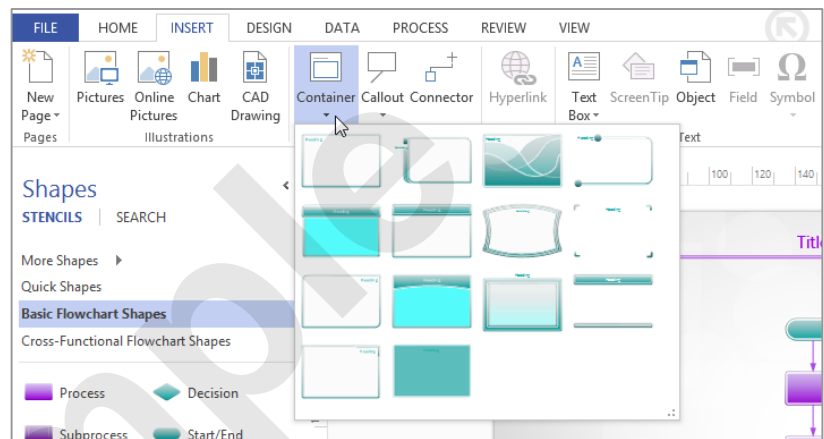
Some of these open dialog boxes...

- 5 On the **VIEW** tab, click on **Zoom** in the **Zoom** group to open the **Zoom** dialog box

- 6 Click on **[Cancel]**, then click on the **HOME** tab

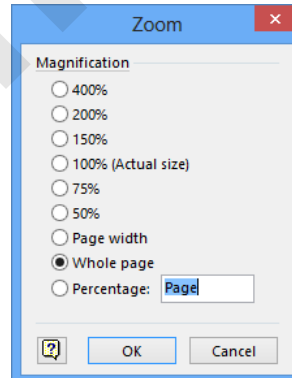


2



3

5



For Your Reference...

To **use** the **ribbon**:

1. Click on a **tab** to display the **commands**
2. Click on a **button** to activate a **command**, display a **gallery** or display a **dialog box**

Handy to Know...

- Additional tabs known as **Contextual tabs** appear in specific circumstances. For example, if you insert a picture, the **PICTURE TOOLS: FORMAT** tab will appear. This provides quick access to all of the tools you may need to modify and work with the picture.

MINIMISING THE RIBBON

The **ribbon**, valuable as it is, does occupy a reasonable amount of space. To maximise your working space you can minimise the **ribbon** so that only the tabs are visible. You can minimise

the ribbon as a once-off operation or have it constantly minimised and display full commands only briefly when a tab is clicked.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open...

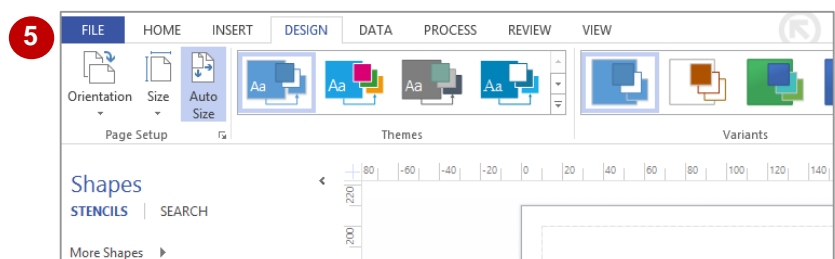
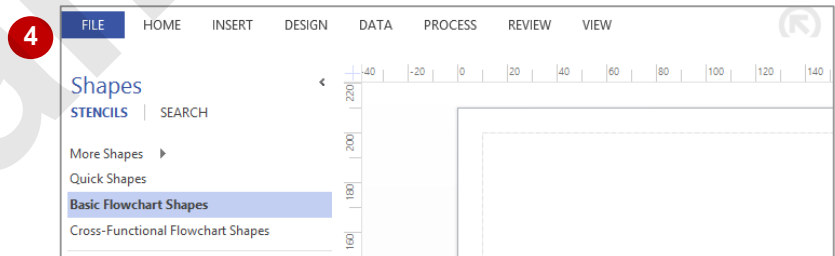
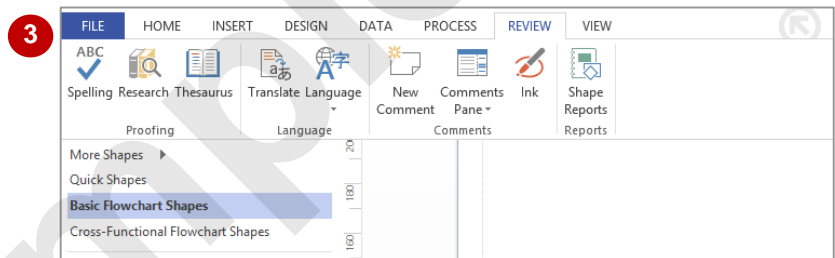
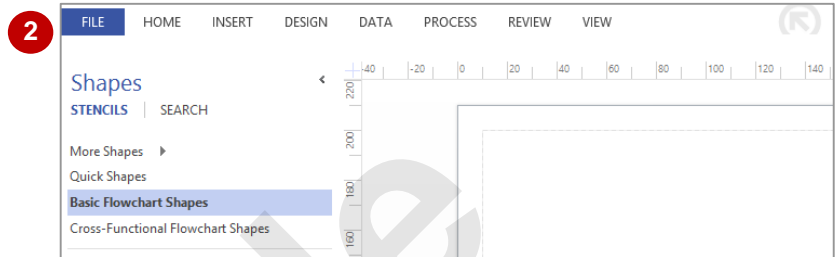
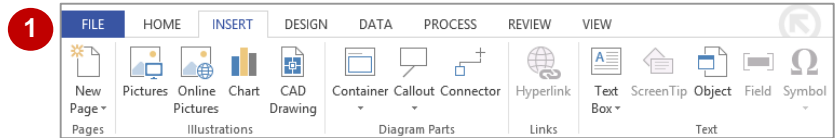
- 1 Click on the **INSERT** tab to display the **Insert** commands
- 2 Double-click on the **INSERT** tab to minimise the ribbon

While the tabs stay visible, the rest of the commands are hidden...

- 3 Click on the **REVIEW** tab to temporarily redisplay the ribbon, this time with the **Review** commands
- 4 Click back in the drawing

The ribbon will hide again – it only becomes visible when you need it. You can redisplay it permanently though...

- 5 Double-click on the **DESIGN** tab to redisplay the ribbon permanently
- 6 Click on the **HOME** tab



For Your Reference...

To **hide/display** the **ribbon**:

1. Double-click on the active tab to hide the **ribbon**
2. Click on a tab to see the **ribbon** temporarily
3. Double-click on a tab to redisplay the **ribbon** permanently

Handy to Know...

- You can also collapse the ribbon by clicking on the **Collapse the Ribbon** arrow, located in the lower right corner of the ribbon or pressing **Ctrl** + **F1**. You can quickly expand it again by double-clicking on a tab or pressing **Ctrl** + **F1** again.

UNDERSTANDING THE BACKSTAGE VIEW

The **ribbon** lets you work on the content in a drawing so that you can add more content, format it, copy shapes, and much more. The **Backstage view**, which is accessed using the

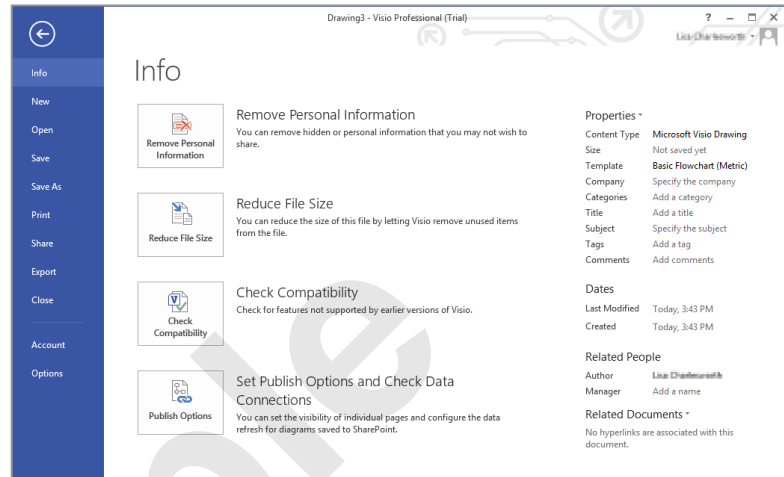
FILE tab, lets you do something with the content you create. You can save it for later use, print it on paper, send it via email, and more by using the options found in the **Backstage**.

The Backstage View

The **FILE** tab on the **ribbon** is not a normal tab – as you can tell by the fact that it is coloured. Clicking on the **FILE** tab launches a mini-program within Microsoft Visio known as **Backstage view**. The **Backstage**, as it's known for short, occupies the entire screen.

At the left of the **Backstage** is a navigation pane which is made up of **tabs**. These tabs provide you with access to various operations, such as printing, saving and sharing. They can also provide you with information about your document such as the file size.

Clicking on one of these tabs displays a range of options associated with the particular operation.

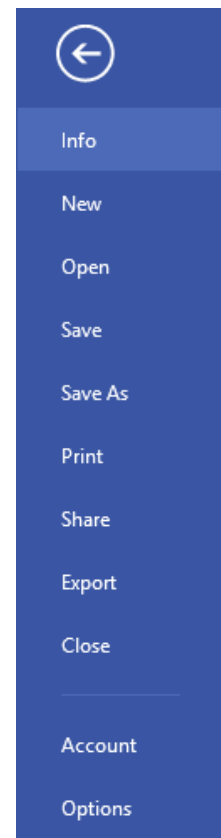


The whole underlying purpose of the **Backstage** is to let you protect your data, share it with others, and provide you with valuable information about your drawing. Depending on what type of drawing it is and what has been done to it, different information may display when the **Info** tab is selected.

Backstage Tabs

The **Backstage tabs** provide more options for working with a drawing.

| | |
|----------------|--|
| Info | Provides status information about the current drawing and lets you manage versions. |
| New | Lets you create a new document and provides access to a gallery of built-in templates as well as a range of online templates. |
| Open | Provides a list of recent drawings as well as the option to search through your Computer, SkyDrive or other place, to find what you are looking for. |
| Save | Saves your current drawing (if already saved to a location) or prompts you to save to a location. |
| Save As | Allows you to name your drawing and save it to a location. |
| Print | Lets you print the current drawing and preview it. |
| Share | Lets you share your drawing with other people by email or online via the Cloud (SkyDrive). |
| Export | Allows you to create a PDF/XPS drawing or change the file type of your drawing. |
| Close | Closes your current drawing. |
| Account | Lets you log into your SkyDrive account or switch accounts. You can also see a list of connected services, such as Twitter and Facebook, and add services such as LinkedIn and SkyDrive. The Product Information area gives you information about the status of any available updates. |
| Options | Presents you with a range of options which assist in the creation and editing of your drawing. |



ACCESSING THE BACKSTAGE VIEW

The **Backstage** provides you with options for working on your drawings and key information about the status of Microsoft Visio 2013. It is usually accessed by clicking on the **FILE** tab to

the left of the **ribbon**, but it can also appear when keyboard shortcuts for specific commands are used.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open...

- 1 Click on the **FILE** tab to display the **Backstage**, then click on the **Info** tab in the left blue panel if it is not already selected

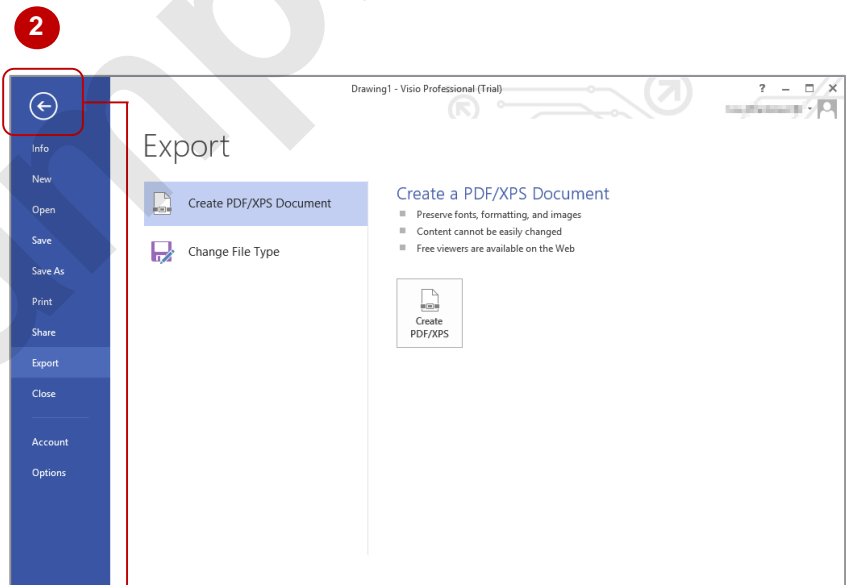
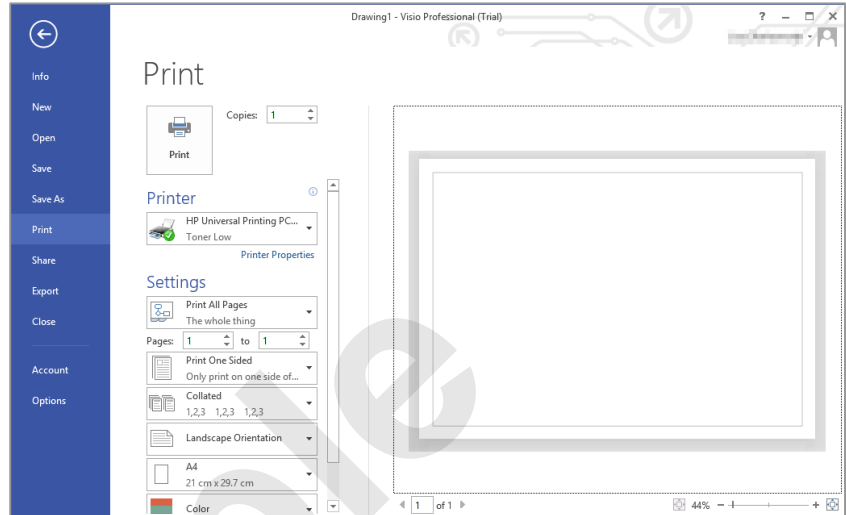
This tab displays information relating to your drawing such as the Properties and provides options for reducing file size, checking compatibility and more...

- 2 Click on the **Print** tab to see the printing options

A preview of how the drawing will print will appear to the right of the window...

- 3 Click on the **Export** tab to see the options for exporting the drawing as a PDF or another file type

- 4 Click on the **Back** arrow at the top of the blue panel to close **Backstage** and return to the drawing



3 Back arrow

For Your Reference...

To **access** the **Backstage**:

1. Click on the **FILE** tab
2. Click on the desired tab in the blue panel to the left of the screen

Handy to Know...

- You can also close the **Backstage** by pressing **Esc**.

USING SHORTCUT MENUS

In addition to the **ribbon**, Visio also features **shortcut menus** that appear when you right-click in an area on the screen or on an object. The content of the menu will vary depending on

where you click. **Shortcut menus** provide an alternative (and usually quicker) way to searching through the ribbon to find a specific operation or command.

Try This Yourself:

Before starting this exercise ensure you have a blank drawing open...

- 1 Drag any shape from the **Basic Flowchart Shapes** stencil (at the left of the screen) onto the drawing page, then move the mouse pointer over the shape and click with the **right** mouse button to display a **shortcut** or **contextual menu**

Because you have clicked on a shape in the drawing, the menu includes commands that relate to working with shapes...

- 2 Click anywhere on the page with the **left** mouse button to close the shortcut menu

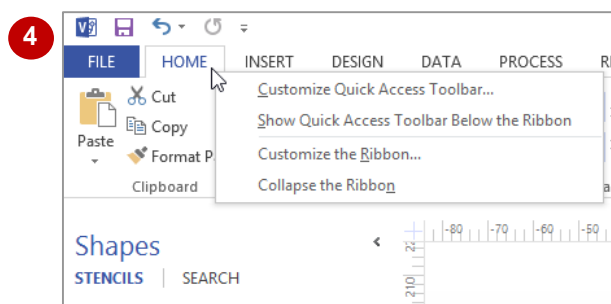
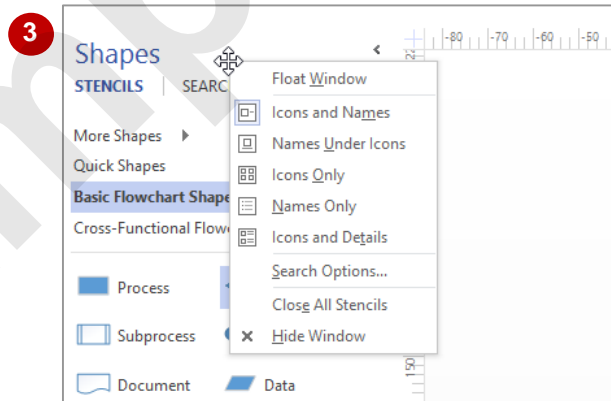
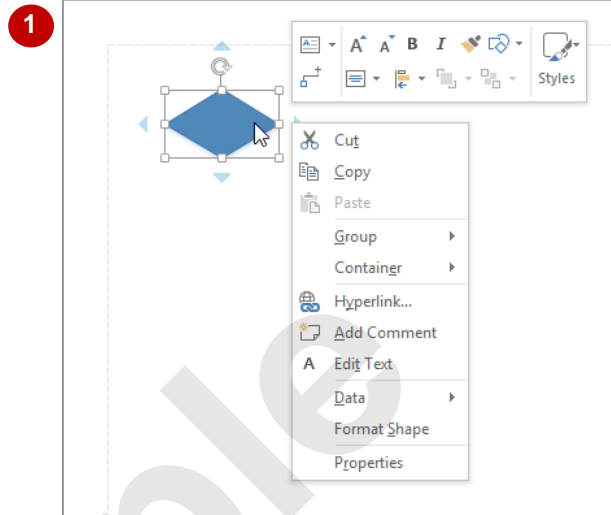
- 3 **Right-click** on the title bar of the **Shapes** window to display a shortcut menu

Notice how it differs from the previous menu. Visio has made an educated guess about what you want to do based upon what you have clicked...

- 4 **Right-click** on one of the **tabs** on the ribbon

A different menu will display...

- 5 Click anywhere on the page with the **left** mouse button to close the shortcut menu



For Your Reference...

To **display a shortcut menu**:

1. Point to the object or area of the screen on which you want to perform an operation
2. **Right-click** to display the shortcut menu

Handy to Know...

- Once a **shortcut menu** appears, the options in it are selected by clicking on them with the left mouse button or by pressing the underlines letter in the menu option.

UNDERSTANDING DIALOG BOXES

Dialog boxes contain a series of controls that are used to adjust settings for a particular aspect of a drawing. They appear either when you click on a **dialog box launcher** at the bottom right

corner of a group on the ribbon, or when you click on a command that displays a dialog box. Dialog boxes are often used for adjusting some of the more advanced aspects of a drawing.

Typical Dialog Box Controls

Dialog boxes have various tools to help you perform tasks. These tools are known as **controls** and some typical ones are shown below.

Tabs are used to provide more settings in the one dialog box.

Radio buttons allow you to choose only one option from a set of options.

Check boxes turn settings either on or off. When on the check boxes display a tick and therefore these controls are also known as tick boxes.

Drop arrows provide a list of options for the text box when the arrow is clicked. The list "drops down" from the arrow.

Command buttons provide a means of saving the changed settings [OK], or closing the dialog box without accepting any changes made [Cancel].

Preview boxes provide a preview of what the selected settings will look like.

