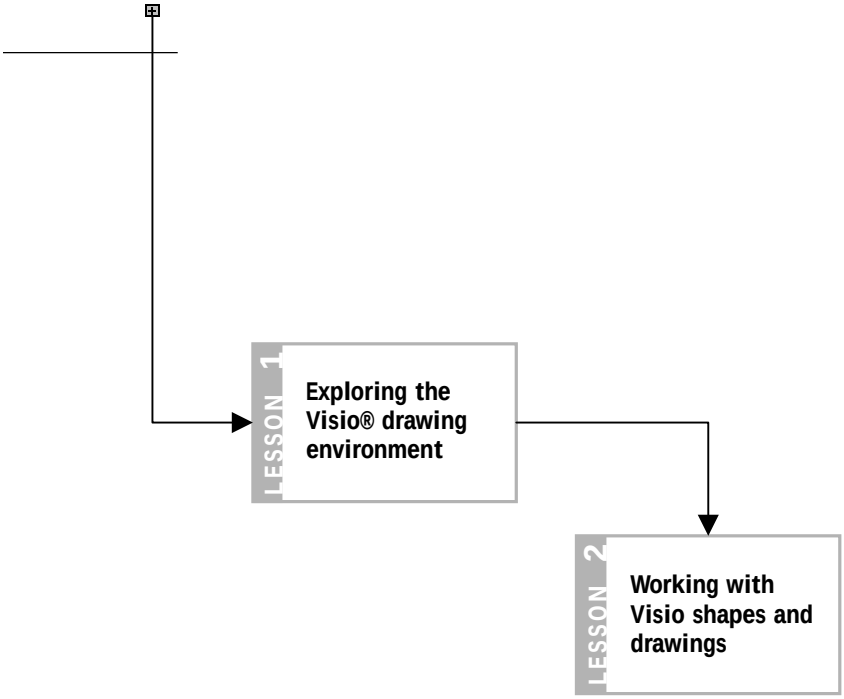
Module 1

# Touring Visio 5.0



**45 minutes**

**MODULE 1 TIME**

Gauge the level of your audience and pace the module accordingly, but don't spend more than 45 minutes on this module.

**Slide 10**

**Slide 11**

## Module information

This module leads the class on a tour of the Visio drawing environment and introduces drag and drop drawing and SmartShapes® symbols. It teaches students how to perform basic Visio tasks, such as opening, saving, and closing Visio files. Reinforce the class' understanding of the three Visio files: templates, stencils, and drawing files. Also, the students should finish this module feeling as if they have a good understanding of the Visio drawing environment and where to go for help if they need it.

Keep the demonstrations in this module simple and brief.

### Module objectives

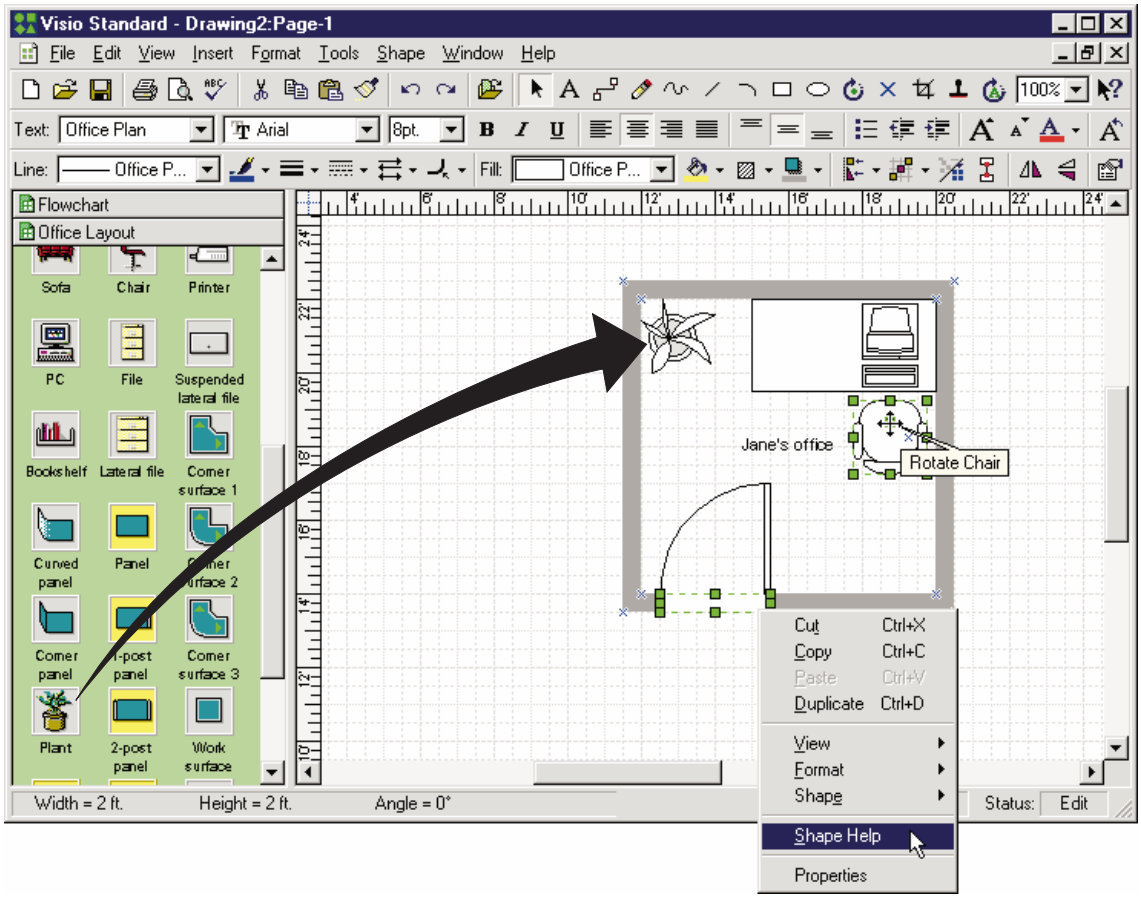
- Start the Visio program.
- Identify and open Visio files: templates, stencils, and drawings.
- Become familiar with the Visio drawing environment and customize it.
- Become familiar with Visio templates, stencils, and SmartShapes symbols.
- Display, reposition, and close stencils.
- Drag and drop shapes.
- Use shape control handles and shortcut menus.
- Save and close drawings.

## Presentation on Module preview

Introduce the module using the module objectives. When discussing an objective illustrated in the module preview, focus the class' attention on the module preview rather than the slide.

Module 1

# Module preview



## Lesson information

This lesson teaches the students how to open Visio files: templates, stencils, and drawings. It familiarizes them with the Visio windows, tools, and menus and teaches them how to customize the Visio environment. During this lesson, the instructor demonstrates everything—no hands-on practice until the next lesson.

### Lesson objectives

- Open Visio templates, stencils, and drawings.
- Understand the difference between Visio files.
- Identify a Visio file by its file icon and extension.
- Understand the benefits of using a template to start a drawing.
- Become familiar with the Visio windows, tools, and menus.
- Use ScreenTips to identify tools and toolbar buttons.
- Customize the environment and adjust window views.
- Display and close stencils.
- Identify SmartShapes symbols.

**VISIO DRAWING KIT METAPHOR**

To create any type of drawing or perform any task, you need a toolkit. For example, an architect uses lined paper, technical pens with varying lead widths, rulers, stencils, and so on to draw a floor plan. Visio products provide you with electronic templates that open stencils with shapes and an electronic drawing page with a grid to create your business and technical drawings. Visio products also provide you with electronic versions of rulers and drawing tools. Think of Visio products—Visio Standard, Visio Professional, and Visio Technical—as drawing kits that help you create your drawings.

## Presentation on Lesson glossary

Introduce the lesson using the lesson information, objectives, and definitions in the lesson glossary. If you have a traditional stencil, use it to define the Visio stencil—its electronic counterpart.

Ask the students what other Windows-based products they use and compare those and the Visio program.

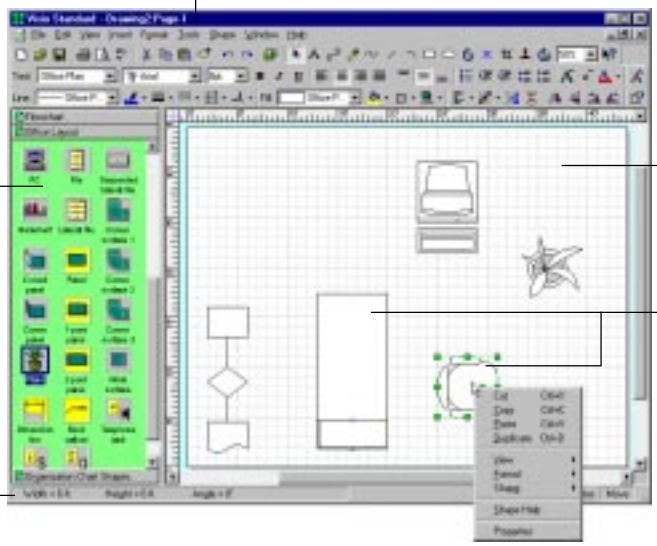
LESSON 1

# Exploring the Visio drawing environment

## LESSON GLOSSARY

**Visio program window** Contains the stencil, drawing window, and status bar.

**Stencil** A Visio file that is a collection of SmartShapes symbols often associated with a particular drawing type, such as organization charts.

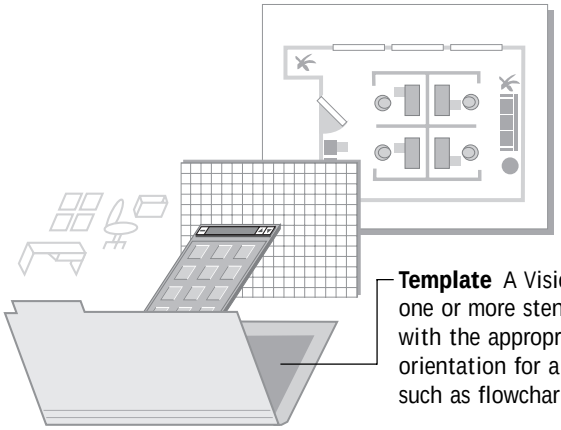


**Drawing file** A Visio file that contains a **drawing**, which consists of all the shapes on the page.

**Drawing window** Displays a single drawing page on a blue background called the **pasteboard**.

**SmartShapes® symbols** Shapes that are programmed to behave predictably when you move, size, or add text to them, and may have other intelligent behavior.

**Status bar** Displays information about the selected shape, such as size and position.



**Template** A Visio file that usually opens one or more stencils and a drawing page with the appropriate page size and orientation for a particular drawing type, such as flowcharts or network diagrams.

### FILE ICONS AND EXTENSIONS

| | |
|---|---|
| | **Template (.VST)** |
| | **Stencil (.VSS)** |
| | **Drawing (.VSD)** |

## Presentation on
## Starting the Visio program and opening Visio files

Introduce the topic using the introductory information on the Workbook page.

### Demonstration

**DEFAULT VISIO FOLDER**

The Visio setup program installs the program file, Visio32.exe, in the \\Program Files\Visio folder by default.

- Choose Start > Programs > Visio Standard, Visio Professional, or Visio Technical. When the Choose a Drawing Template dialog box appears, move on to the next topic and demonstration.

## Starting the Visio program and opening Visio files

Like most Microsoft Windows programs, you can start the Visio program various ways, but first you must be running Microsoft Windows 95 or Microsoft Windows NT 4.0 or later.

You can start the Visio program by:

- Choosing Start > Programs > Visio Standard, Visio Professional, or Visio Technical.
- Double-clicking the Visio program icon in Windows Explorer.

When working with the Visio program, you usually work with three file types: templates, stencils, and drawings. You can visually distinguish them from one another by their file icon or file type extension, a three-character tag that identifies the file type. For example, the file type extension for a template is .VST.

You can open Visio files as you start the Visio program or while it's running. Open a template to start a drawing, a drawing file to modify a drawing, and a stencil to add particular shapes to a drawing. When you open templates and stencils, the program opens a copy of the file so you don't alter the file, and you can use the template or stencil over and over.

**Starting drawings with wizards**

Use a wizard if you want to automate the creation of your drawing using data. For example, you can use data from a Microsoft Excel spreadsheet to create a project timeline or an organization chart. Or, you can automate the creation of an office layout using the Office Layout Wizard.

**FILE ICONS AND EXTENSIONS**

**Template (.VST)**

**Stencil (.VSS)**

**Drawing (.VSD)**

***Open file:***
**\\Solutions**
**\Flowchart**
**\Flowchart - Basic.VST**

***Open file:***
**\\Solutions**
**\Visio Extras**
**\Callouts.VSS**

**FILE EXTENSIONS**

The students might not see file extensions on their computers at their company because it depends on their operating system settings. With Windows 95 and Windows NT, you can hide file extensions.

## Demonstration

1. In the Choose a Drawing Template dialog box, browse the folders in the Solutions folder to show the students the different types of templates their Visio product provides.

   *Visio products include different templates and stencils because each product targets a different audience; however, all Visio products include Visio Standard content, such as the Flowchart, Organization Chart, Office Layout, and Marketing Diagram Templates.*

2. Point out the template file icon and extension, file description, and preview in the Choose a Drawing Template dialog box.

   *The file description and preview help you choose the right template for the drawing you want to create and give you an idea of the types of shapes included in the stencil(s) that the template opens.*

3. Review the Files of type list.

   *Stencils are located in the same folders, but in the Choose a Drawing Template dialog box, the program displays templates only.*

4. Navigate to the \\Solutions\Flowchart folder and open Flowchart - Basic.VST.

5. Click the Open Stencil button, browse the folders, and review the file description, Files of type list, and the file icon and extension.

6. Navigate to the \\Solutions\Visio Extras folder and open Callouts.VSS.

   *The stencils located in the Visio Extras folder are not opened by a template and are for general use.*

## *Opening Visio files*

| To open a | use this procedure. |
|---|---|
| **Template** | Start the Visio program, and then open a template using the Choose a Drawing Template dialog box.<br><br>Choose File > New > Browse Templates, and then open a template using the Browse Templates dialog box to browse the templates and to see a preview and description of a template before opening a template.<br><br>Choose File > New, the drawing type, and then the template to open a template if you know which template you want and where it's located.<br><br>Choose Start > Programs > New Visio Drawing, the drawing type, and then the template.<br><br>Right-click the desktop, and then choose New > Visio 5 Drawing from the shortcut menu to create a drawing file on the desktop. Name the drawing file, and then double-click it to start the Visio program and choose a template. |
| **Drawing** | Before you start the Visio program, double-click a drawing file or drag it onto the Visio program icon to start the program and open the file.<br><br>Choose File > Open, and then open a drawing using the Open dialog box. Or, click the Open button. |
| **Stencil** | Choose File > Stencils > Open Stencil, and then open a stencil using the Open Stencil dialog box. Or, click the Open Stencil button.<br><br>Choose File > Stencils, the drawing type, and then the stencil to open a stencil if you know which stencil you want and where it's located. |

**Opening other file types**

You can open, or import, other file types, such as AutoCAD drawings and Windows Metafiles, with the Visio program. To see a list of file formats you can open, click the Open button, and then browse the Files of type list in the Open dialog box.

## Presentation on Starting a drawing with a template

Reinforce that the most common way to start a drawing is by opening a template and review the benefits, listed on the Workbook page. Ask the students if they've used templates in other programs and compare the templates they've used and Visio templates.

Visio templates don't include any shapes on the drawing page, but users can also create their own templates that include shapes already placed on the page. For example, they could create a template that opens stencils and a drawing page with a company logo on it, so they don't have to drag the logo onto the drawing page every time they create a new drawing.

The main difference between Visio templates and templates in other drawing programs is that Visio templates open stencils, which contain predrawn shapes with which you can quickly create drawings.

### Demonstration

- Choose Help > Template Help and navigate to the template help for the Flowchart - Basic Template. Give the students an idea of the type of information template help includes.

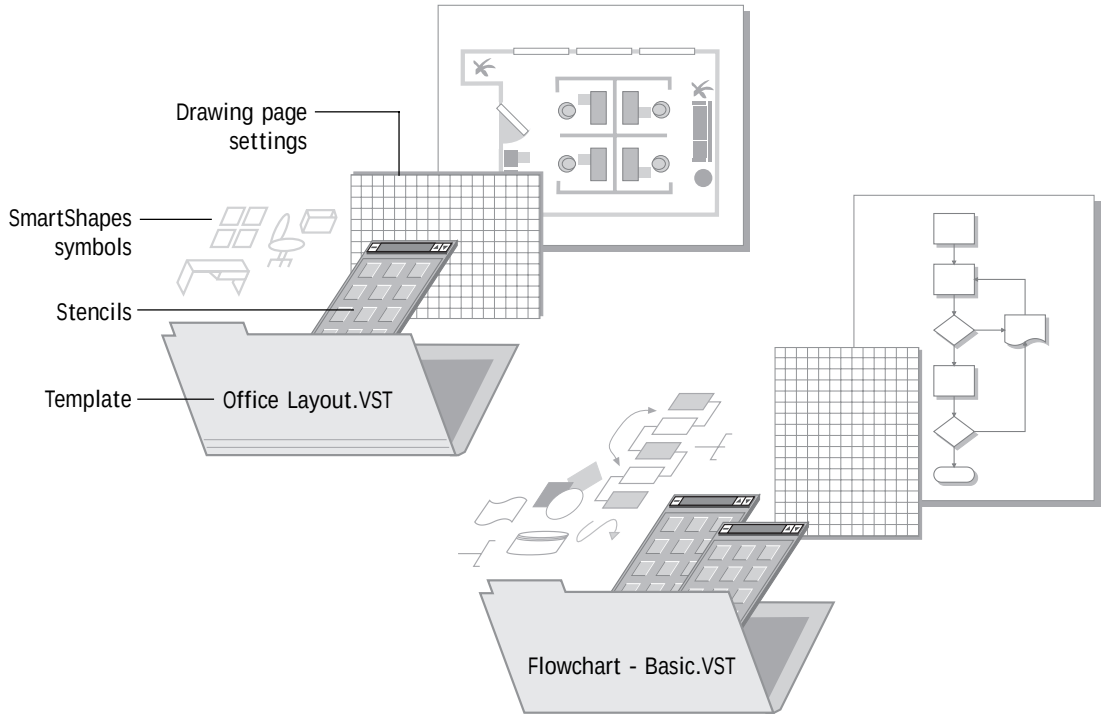
## Starting a drawing with a template

You can quickly create the drawing you want when you start with a Visio template. Using a template ensures consistency across your drawing files, so you can focus on what goes on the page while the template takes care of the rest. The benefits of using a template include the following:

- It opens one or more stencils containing predrawn shapes for a particular type of drawing. You don't have to create any shapes, unless you want to.
- It opens a drawing page set up with an appropriate grid, scale, page size, and orientation for a particular type of drawing. You don't have to spend time setting up your drawing—just begin dragging shapes onto the drawing page as soon as you open a template.
- It contains text, line, and fill styles appropriate for a particular type of drawing, saving you the time it takes to define your own styles.
- It has online assistance (template help) explaining the most efficient way to draw a particular type of drawing and the best way to use the predrawn shapes.

**Getting template help**

To get help for using a template, or if you're not quite sure why you'd use a particular template, choose Help > Template Help.



## Presentation on Getting acquainted with Visio windows

Introduce the topic using the introductory information on the Workbook page.

### Demonstration

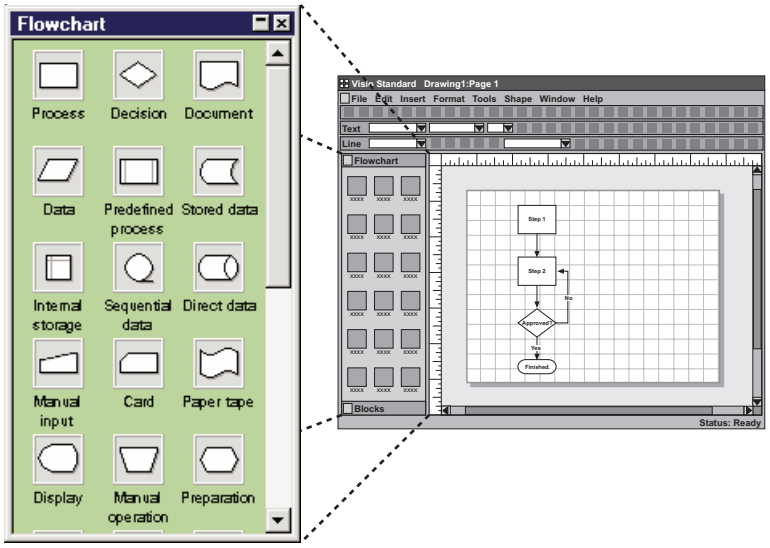
1. Point out the drawing, stencil, and Visio program windows.
2. Point out the title bars for the Visio program window and stencil window, and click the window icon in the upper left corner of a window to show the window menu. Demonstrate the standard Windows functionality of the environment.
3. Point out that the Visio program displays a generic name like Drawing 1: Page 1 in the window title bar when a drawing hasn't been saved yet. After the drawing is saved, the name appears in the Visio program window title bar.
4. Point out the elements of the Visio program window—drawing window, stencil window, toolbars, menus, and status bar.
5. Demonstrate clicking a stencil's title bar to show it when more than one stencil is open. Demonstrate scrolling and resizing the stencil window to view more shapes.
6. Demonstrate floating, docking, and closing a stencil using the stencil's shortcut menu.

   *The program provides different stencil options so you can position windows optimally for your screen size.*
7. Point out the elements of the drawing window—the drawing page, scroll bars, rulers, and pasteboard.

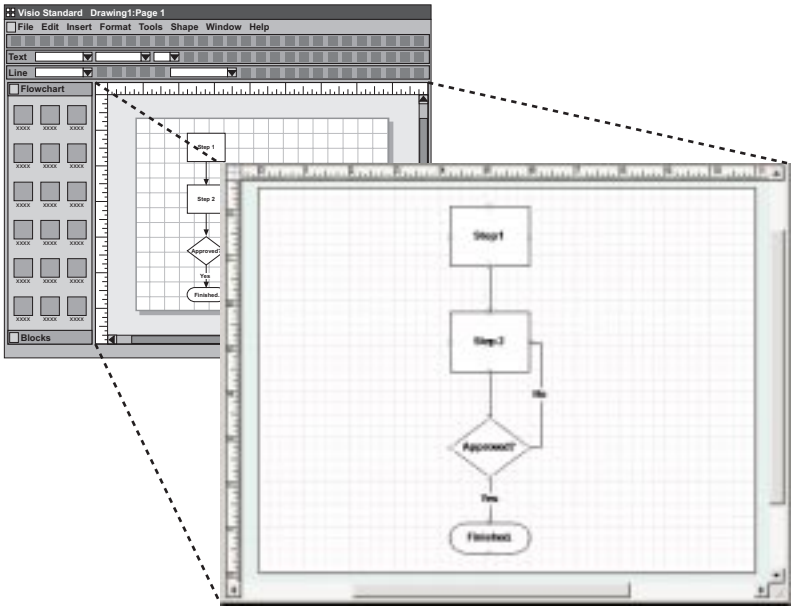
   *When creating a drawing, make sure it fits on the drawing page. If it doesn't, you can resize the drawing page. Any shapes on the pasteboard don't print.*
8. Demonstrate the type of information the status bar displays about shapes: message and location of the shape.

## Getting acquainted with Visio windows

The Visio program window contains the toolbars, menus, status bar, stencil window, and drawing window. The stencil window contains a stencil of SmartShapes symbols you drag to the drawing page to create your drawing. The drawing window contains the drawing page that displays a grid like that on traditional graph paper, a pasteboard area, and rulers.




By default, the stencil is docked to the left side of the drawing window.




The drawing window contains the drawing page that displays a grid (nonprinting horizontal and vertical lines) that you can use to position shapes.

## Presentation on
## Getting acquainted with Visio tools and toolbar buttons

**COMMON QUESTION**

Many students ask if you can show, hide, or drag individual tools or toolbar buttons as you can in Microsoft products. The answer is: End users cannot, but developers can. For example, developers can delete the Toolbars menu if they don't want users displaying toolbars. Or, developers might write a program and then add a custom menu command for the program on one of the Visio menus. Or, the developers can add a custom menu.

Introduce the topic using the introductory information on the Workbook page.

### Demonstration

1. Point out the default toolbars and pause over a few tools to show the class how to view tips.
2. Click the Pointer tool, and then drag a Process shape onto the drawing page.

   *When you start the Visio program, the Pointer tool is your default tool. Use it to drag, select, move, and resize shapes.*
3. Move the shape with the Pointer tool and point out the status bar information.

   *The pointer turns white when placed over a shape, and the status bar displays "Move" when the program is ready to move the shape. If you place the pointer over a corner of the shape, the pointer turns into a double-headed arrow because the program is ready to size the shape—the status bar displays "Size."*

**TOOLBAR BEHAVIOR**

If you choose the Text toolbar on the toolbar shortcut menu when only the Standard toolbar is showing, the program shows the Shape toolbar. Choose the Text toolbar again, and the program shows the Text toolbar.

4. Click the Rotation tool, and then rotate the shape.

   *Shapes display different selection handles depending on the tool with which you select the shape.*
5. Select the shape, and then click the Zoom In button to zoom in on the shape.
6. Use different tools on the Shape toolbar to apply formatting, showing the class as you go how to use toolbar button lists and style lists.
7. Use the drawing tools to draw a line, rectangle, and ellipse.
8. Choose the Pointer tool, move the shapes you just created, and point out the information on the status bar.

   *After drawing a shape, use the Pointer tool to move it.*

**MONITOR RESOLUTION**

The tools and toolbar buttons the Visio program shows depend on your monitor resolution. Monitors with a higher resolution can display more tools and toolbar buttons. Before the class, you should set the resolution for the monitors in your training room at SVGA or higher.

### To show the Page toolbar:

- Follow the procedure.

  *You must show the Standard toolbar to use the Visio program because it contains tools for which there are no menu options, such as the Pointer tool and drawing tools.*

## Getting acquainted with Visio tools and toolbar buttons

Many Visio tools and toolbar buttons look similar to the ones in Microsoft Office products, and the Visio program displays tips, so you should be able to easily recognize many of the Visio tools and toolbar buttons. They are also grouped on toolbars based on their function. For example, the Page toolbar contains tools and buttons you use to position shapes on the drawing page and move between pages in a drawing file.

### *Default Visio toolbars*

| This toolbar | contains these tools. |
|---|---|
| **Standard toolbar** | Primary tools for dragging and drawing shapes, as well as standard Windows toolbar buttons for opening, saving, previewing the printed drawing, and printing drawings. |
| **Text toolbar** | Style lists for text along with toolbar buttons for choosing format, alignment, size, color, and bullets. |
| **Shape toolbar** | Style lists for lines and fills along with toolbar buttons for shadows, layout, grouping, stacking order, and rotation. |

View, Page, Web, and Developer toolbars are also available in the Visio program. You can show these toolbars by right-clicking anywhere on the toolbar to display a shortcut menu with toolbar options. Check the toolbars you want to show and uncheck the toolbars you want to hide. Choose Toolbars from the shortcut menu to display a dialog box in which you can hide or display more than one toolbar at once, change the toolbar icon size, or show or hide tips (ScreenTips).

**To show the Page toolbar:**

- Right-click the toolbar, and then choose Page from the shortcut menu.

  *The program remembers the toolbars you choose, so that the next time you start the program, it displays the same toolbars.*

## Presentation on Getting acquainted with Visio menus

Introduce the topic using the introductory information on the Workbook page.

### Demonstration

1. Click the Pointer tool, and then drag a Stored Data shape onto the drawing page.
2. Choose Shape > Rotate Right to show how to use a menu command to perform an action on a shape.
3. Choose the Shape menu, show the class the keyboard shortcuts for some of the menu commands, and then use the keyboard shortcut for the Rotate Right menu command (Crtl+R) and Rotate Left command (Crtl+L).
4. Choose the Shape menu, and then point out the ellipses next to the Size and Position command, which indicates that the command displays a dialog box. Choose the menu command to display the Size and Position dialog box, and then change the width of the shape.

   *To move any dialog box if it's obscuring your view of the drawing page, click the title bar and drag the dialog box to a new location.*
5. Click the Help button in the dialog box, which explains the options in the dialog box.
6. Choose Shape > Operations to show a submenu.
7. Choose the Help menu and review the types of online assistance included with the Visio program. Emphasize the usefulness of online assistance, especially template and shape help.
8. Show a shape and drawing page shortcut menu. For instance, right-click the Process shape to show the class a shape shortcut menu. Then, make sure nothing is selected, and right-click the drawing page to show the class the shortcut menu for the drawing page.
9. Demonstrate hiding and showing the grid and rulers using the View menu. Mention all the commands on the View menu, except Shape Layer and Layer Properties (which are covered in a later module).

## Getting acquainted with Visio menus

Visio menus, like Visio toolbars, are organized by related tasks and look similar to the menus in Microsoft Office products. Many menus have a corresponding keyboard shortcut, tool, or toolbar button that performs the same action. For example, you can rotate a shape using the Rotate Right command on the Shape menu, the keyboard shortcut (Crtl+R), the Rotate Right toolbar button on the Shape toolbar, or the Rotation tool.

### *Visio menus*

| Use this menu | to do the following. |
|---|---|
| **File menu** | Create, open, print, and save Visio files. Also use to set up the page, send a Visio file as an e-mail attachment, and exit the Visio program. |
| **Edit menu** | Copy, paste, select all, and delete shapes. Also use it to find and replace text and to move between, delete, and reorder pages. |
| **View menu** | Zoom in and out of the drawing window, move around the drawing page, and hide or show drawing environment elements, such as rulers and the grid. |
| **Insert menu** | Insert pages, fields, hyperlinks, and pictures from other programs. |
| **Format menu** | Format text and shapes. |
| **Tools menu** | Perform actions, such as align shapes, distribute shapes, and center a drawing. Also use to run programs that automate tasks, such as checking spelling, laying out shapes, and reporting on shapes. |
| **Shape menu** | Perform actions on shapes, such as arranging, positioning, grouping, and rotating shapes. |
| **Window menu** | Open, tile, view, and cascade windows. |
| **Help menu** | Get online assistance, such as online, shape, and template help, when using the Visio program. |

**Using the shape or drawing page shortcut menu**

You can find some menu commands, such as Copy, Format, and Zoom, by right-clicking a shape or the drawing page, and then choosing the option from the shortcut menu.

## Presentation on Zooming in and out of the drawing window

Introduce the topic using the introductory information on the Workbook page.

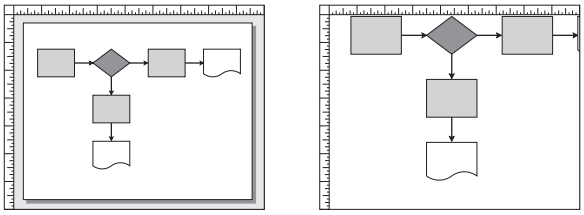
### Demonstration

1. Zoom in on a selected shape using the Zoom In tool. Zoom out of the drawing using the Zoom Out tool.
2. Make sure nothing is selected, and then zoom in on the middle of the drawing page using the Zoom In tool. Zoom out of the drawing using the Zoom Out tool.
3. Zoom in again using the Zoom list, and then zoom out again using the Zoom list.
4. Demonstrate using the Last Zoom, Actual Size, Page Width, and Whole Page commands on the View menu to zoom in and out of the drawing window.
5. Right-click the drawing page to show the class that the shortcut menu for the page also displays the View menu and its commands.
6. Zoom using the keyboard shortcuts and stress how easily you can zoom in on a specific area and out of the drawing window (Ctrl+W) using the keyboard shortcuts.

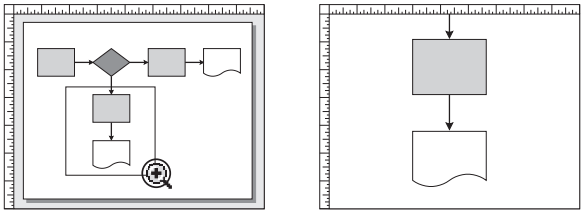
   *The online help or the Quick Reference Card the students receive in this class contains the Zoom keyboard shortcuts.*
7. Use Ctrl+W to zoom out of the drawing window to view the whole drawing page.

## Zooming in and out of the drawing window

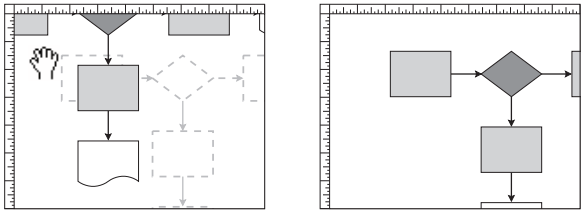
To position shapes exactly or do precise work, you may need to zoom in on a portion of a drawing, especially if you're working with a large drawing. You can zoom in and out of a drawing by using the Zoom tools on the Standard toolbar, or you can use the shortcuts listed here. These shortcuts allow you to move quickly and easily around the page.



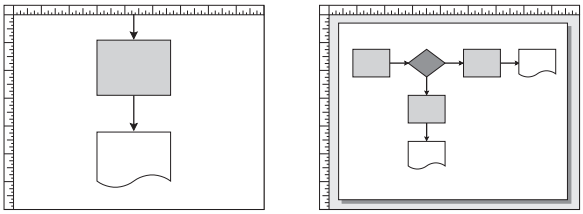
**Ctrl+Shift+left-click** Zoom in on the area where you click in your drawing. Ctrl+Shift+right-click to zoom out of this area. Ctrl+Shift+right-click to zoom out of your drawing page.



**Ctrl+Shift+left-mouse button** Drag around an area of your drawing to zoom in.



**Ctrl+Shift+right-mouse** Move around the drawing page at the same zoom level. This action is sometimes called panning.



**Ctrl+W** View your entire drawing.

**Magnification range**

You can zoom out to 1% and zoom in to 3,098%. You can also type a specific percentage in the Zoom list.

## Presentation on Customizing your Visio drawing environment

Introduce the topic using the introductory information on the Workbook page.

### Demonstration

1. Choose View > Grid to hide the grid, and then choose the command again to display it.
2. Choose View > Rulers to hide the rulers, and then display them again.
3. Choose View > Page Breaks.

   *Page breaks are determined by the settings in the Page Setup and Print Setup dialog boxes.*

4. Right-click the stencil, and then choose one of the stencil views to change the stencil view yet another way.

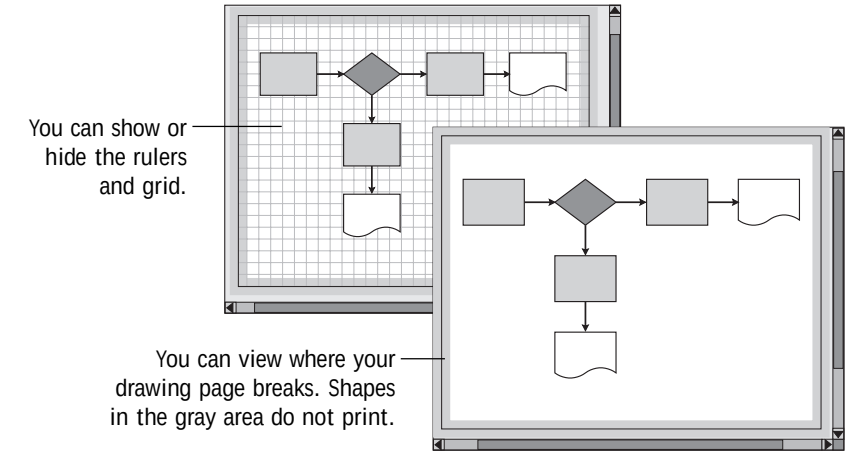
   *The students can use this method if they want to fit more shapes or shape names in the default stencil window size.*

## Customizing your Visio drawing environment

You can customize your Visio drawing environment so it suits your needs. For example, you can hide the grid and rulers if you don't care about positioning your shapes precisely and you want more screen space. Or, you can change the stencil view to display icons and names, icons only, or names only. You can also view page breaks while creating your drawing, so you can take care not to position shapes too close to the edge of the page because shapes in the page-break area do not print.

**Customizing grid intervals**

The intervals of the grid correspond to the unit of measure you set in the Options dialog box. To change the size of the intervals, choose Tools > Ruler & Grid.




## Lesson information

This lesson teaches the students how to drag and drop shapes, work with Visio SmartShapes symbols, and save and close drawings.

### Lesson objectives

- Identify and understand the difference between master shapes and instances.
- Drag and drop shapes.
- Use control handles and shortcut menus to work with SmartShapes symbols.
- Use tips (ScreenTips) to display information about a control handle.
- Save a drawing.
- Enter properties for a drawing when saving it for the first time.

## Presentation on Lesson glossary

1. Introduce the lesson using the lesson information, objectives, and definitions in the lesson glossary.
2. Demonstrate “smart” behavior with some of the shapes already on your drawing page.
3. Close the drawing without saving it, and then exit the Visio program.

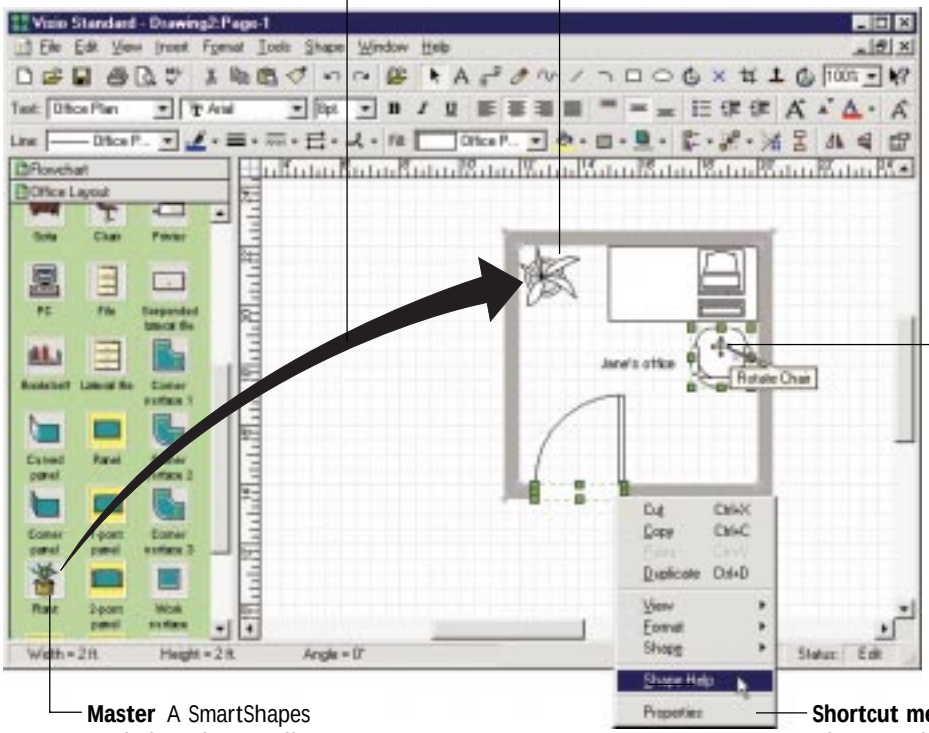
LESSON 2

# Working with Visio shapes and drawings

## LESSON GLOSSARY

**Drag-and-drop drawing** Create an instance of a master shape in a drawing by dragging the master shape from a stencil to the drawing page.

**Instance** A SmartShapes symbol that has been dragged to the drawing page.




**Control handle** A handle you drag to manipulate a shape. ScreenTips tell you how to use the control handle.

**Master** A SmartShapes symbol on the stencil.

**Shortcut menu** Menu that appears when you right-click a shape, stencil, toolbar, or drawing page.

***Open file:***
**\\Training**
**\M1**
**\Shape Demo.vsd**

## Presentation on Introducing Visio SmartShapes symbols

Introduce the topic using the introductory information on the Workbook page.

### Practice

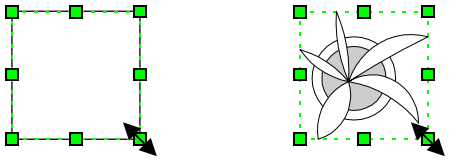
1. Navigate to the \\Training\M1 folder, and then double-click Shape Demo.vsd to start the Visio program and open the drawing file.
2. Introduce the class to different SmartShapes symbols and behavior using pages 1–7 in the multiple-page drawing, Shape Demo.vsd, and teach them how to interpret Pointer tool information when working with the shapes in the drawing.

   *The pointer turns white when placed over a shape, and the status bar displays "Move" when the program is ready to move the shape. If you place the pointer over a corner of the shape, the pointer turns into a double-headed arrow because the program is ready to size the shape—the status bar displays "Size." If you drag a corner selection handle, the shape sizes proportionally, but if you drag a side or top selection handle, you change the width or height only. Paying attention to the pointer can help you work effectively in the program.*
3. Use pages 8–11 of the drawing to introduce the class to more SmartShapes symbols in drawings.
4. Choose File > Close to close the drawing without saving any changes.

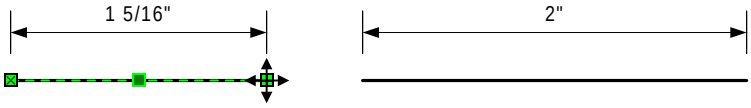
## Introducing Visio SmartShapes symbols

Unlike clip art, Visio SmartShapes symbols (shapes) behave intelligently and predictably. For example, you can:

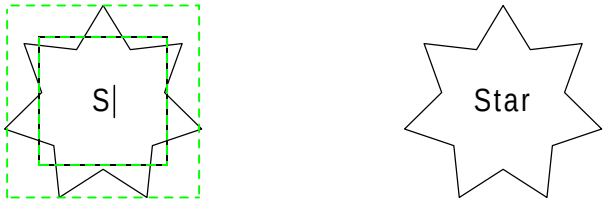
- Drag a corner selection handle to resize a shape proportionally. Some shapes resize proportionally no matter which selection handle you drag.



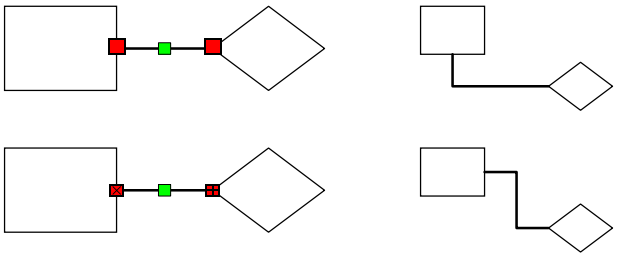
- Resize a shape, and the program automatically calculates and displays new information about the shape. For example, resize a dimension line in an office layout, and the program displays the new length each time you resize it.



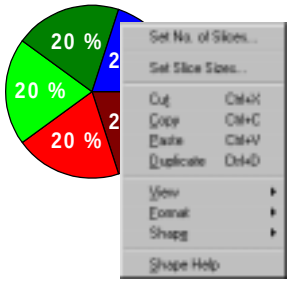

- Select a shape, and then type to add text to it. When you move the shape, the text moves with it.



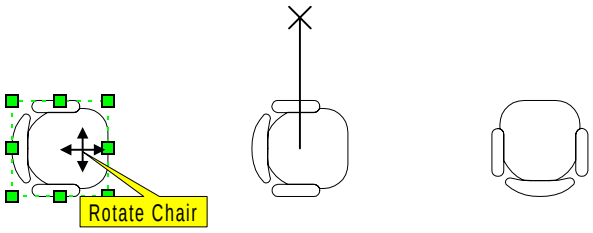

- Connect shapes with SmartConnectors®. When you move the connected shapes, they stay connected.



- Right-click a shape to display a shortcut menu with general and specific commands for particular shapes. For example, right-click a shape to get detailed information (shape help) about using the shape. Or, right-click a shape to associate or view data with the shape, and then report on it later.




- Drag a control handle to manipulate a shape. For example, drag the control handle on the Chair shape to rotate the chair.



***Open file:***
**\\Solutions**
**\Business Diagram**
**\Office Layout.VST**

## Presentation on Dragging and dropping shapes

Introduce the topic using the introductory information on the Workbook page.

### To begin creating your office layout using a template:

- Follow the procedure.

  *Reinforce that a template opens one or more stencils and a drawing page.*

### Practice

- Practice zooming in and out of the drawing page using the keyboard shortcuts.

## Dragging and dropping shapes

When you drag a master from the stencil onto the drawing page, the program creates a copy, called an instance, of the master on the drawing page. When you make changes to the instance, it doesn't affect the master, so you can use the master over and over again.

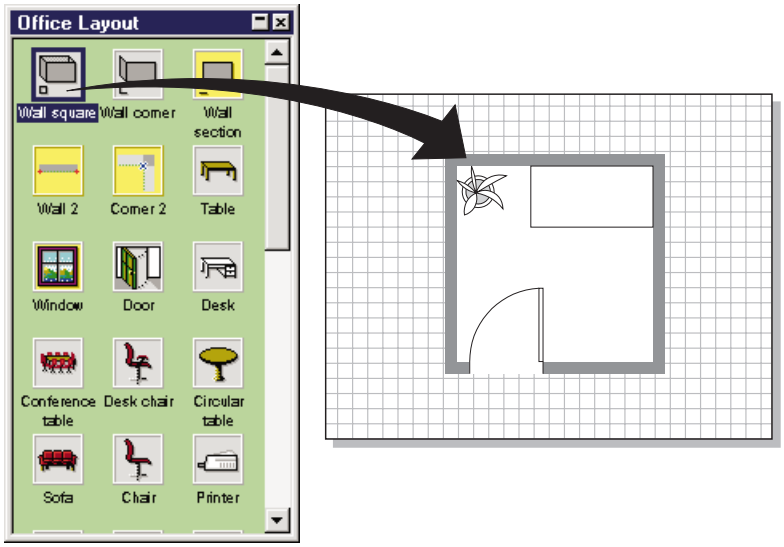
In this procedure, start your drawing with a template and drag shapes onto the drawing page to build your office layout quickly.

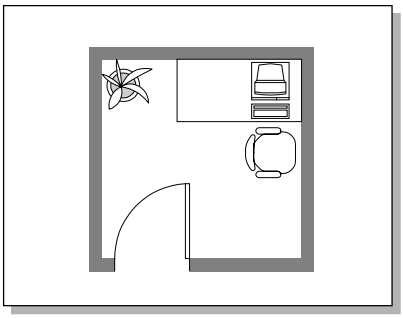
**Getting shape help**

To get information about using a particular shape, right-click the shape on a stencil or the drawing page and choose Shape Help from the shortcut menu. You can also pause the pointer over a shape on a stencil to see information about the shape displayed by the status bar.

### To begin creating your office layout using a template:

1. Choose File > New > Browse Templates, navigate to the \\Solutions\Business Diagram folder, and then open Office Layout.VST.
2. Click the Pointer tool ( ).
3. Drag the Wall square shape onto the drawing page.
4. Drag a Door shape onto the lower wall.
5. Drag a Plant shape, Desk shape, and PC shape onto the drawing page and position them inside the walls.
6. Drag a Desk chair shape onto the drawing page.



## Presentation on Adding text to shapes

Introduce the topic using the introductory information on the Workbook page.

### To add text to the Wall square shape:

- Follow the procedure.

### Practice

**1** Move the Wall square shape—the text moves with the shape.

*This is another good example with which you can show the class how to interpret the pointer information. When the students place the pointer inside the shape, the pointer is black. If they try to move the shape, nothing happens. To move the shape, place the pointer over one of the walls (the pointer turns white), and then drag the shape.*

**2** Choose Edit > Undo; or, like in many other programs, press Ctrl+Z to undo your last action.

## Adding text to shapes

You can add text to any shape. Add text to a shape by selecting it, and then typing. The text is associated with the shape, so when you move the shape, the text moves with it.

Label your office layout by selecting the Wall square shape, and then typing the name of the office owner.

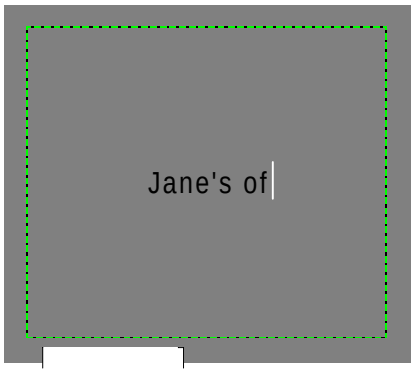
**Changing the number of undo levels**

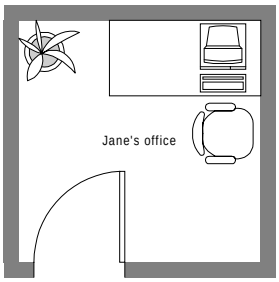
By default, the program can undo the last 10 actions you performed. Choose Tools > Options, click the Advanced tab, and then, under User Settings, type a new number in the Undo Levels box.

### To add text to the Wall square shape:

- Select the Wall Square shape with the Pointer tool, and then type *Jane's office*.

  *The text is automatically centered within the shape.*



## Presentation on Using a shape's shortcut menu

Introduce the topic using the introductory information on the Workbook page.

### To store information with the PC shape:

- Follow the procedure.

### Practice

- Right-click the drawing page to remind the students that it also has a shortcut menu.

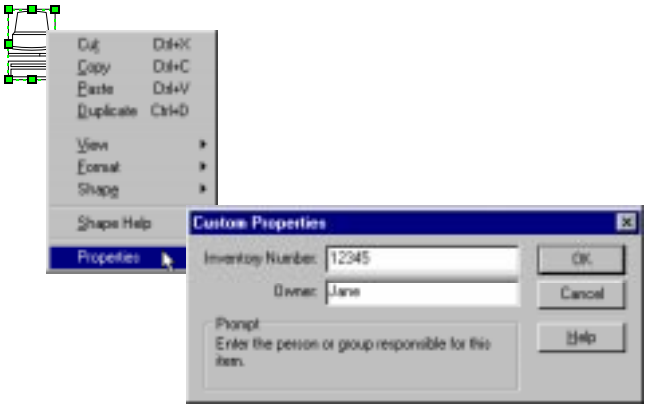
## Using a shape's shortcut menu

Use a shape's shortcut menu to display general and specific commands for particular shapes. For example, right-click a shape, and then choose Shape Help from the shortcut menu to get detailed information about using the shape. Or, right-click a shape, and then choose Properties from the shortcut menu to store information with or view information about the shape, information with which you can create a report using the Property Report Wizard.

In this procedure, store inventory number and owner information with the PC shape in your office layout using its shortcut menu.

### To store information with the PC shape:

1. Right-click the PC, and then choose Properties from the shortcut menu.
2. Enter an inventory number and the owner of the PC shape, and then click OK.



## Presentation on Working with control handles

Introduce the topic using the introductory information on the Workbook page.

### To rotate the Desk Chair shape using its control handle:

- Follow the procedure.

  *The students may need to zoom in to the drawing window to view the Desk Chair shape better.*

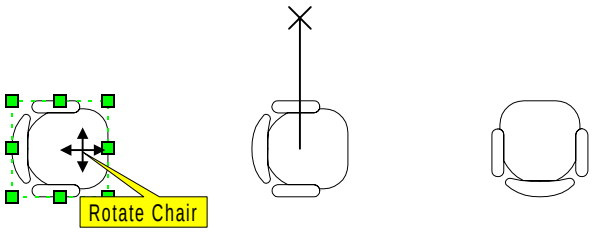
## Working with control handles

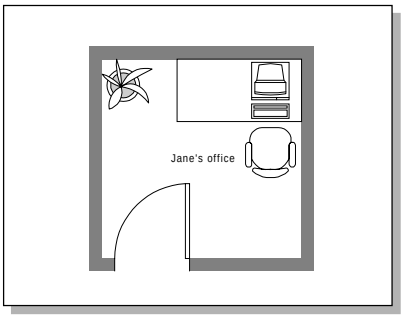
Some shapes have control handles that let you work with shapes in ways you can't with standard shapes. A control handle looks like a selection handle with darker shading. Each control handle has a function unique to the shape on which it appears. To display a ScreenTip about what the control handle does, pause the pointer over the control handle.

For example, use the control handle on the Desk Chair shape to rotate the chair so it faces the desk in your office layout.

### To rotate the Desk Chair shape using its control handle:

1. Right-click the Desk Chair shape, and then choose Shape Help from the shortcut menu.
2. Read the information that describes how to use the control handle, and then click anywhere to close the shape help window.
3. Pause over the control handle on the Desk Chair shape to view the ScreenTip.
4. Drag the control handle to rotate the chair so it faces the desk.



**DEFAULT DRAWINGS FOLDER**

Before the class, set the \\Training\My Drawings folder as the default drawings folder, so the students don't have to navigate to a folder when saving their drawings.

***Reference file:***
**\\Training**
**\M1**
**\Completed drawings**
**\Office Layout.vsd**

## Presentation on Saving and closing your drawings

Introduce the topic using the introductory information on the Workbook page.

### To save and close your drawing:

1. Follow the procedure.
2. Discuss a few ways to distribute drawings, such as printing a drawing, saving it in a different file format such as .html, and incorporating it into another document or e-mail message.

## Saving and closing your drawings

After you've created a drawing, you must save it if you plan to open it and use it again. By default, the Visio program saves drawings in the native Visio drawing file format, .vsd. You can also save drawings in other file formats, such as .gif or .html file formats or in an earlier version of the Visio drawing format, so someone with an earlier version of a Visio program can open your drawing. However, you may lose some formatting when you save drawings in earlier Visio drawing file formats.

In this procedure, save your office layout in the Visio drawing file format and add properties.

**Setting default file paths**

If you always save your drawings in the same folder, you can set that folder as your default drawing folder. Choose Tools > Options, click the File Paths tab, and then enter the path for Drawings. You can also set default file paths for other files, such as templates and stencils.

**To save and close your drawing:**

1. Choose File > Save As and navigate to C:\Training\My Drawings.
2. For File Name, type *Office Layout*, and then click Save.

   *By default, the Visio program saves a drawing as a Visio drawing file with a .vsd extension. When you save a drawing, the same stencils that were open when you saved the drawing open with the drawing file the next time you open it.*
3. In the Properties dialog box, enter property information.

   *For example, enter a description for your drawing so when others open your drawing, they can read the description in the Open dialog box. You can also include a preview picture of the first page of your drawing. You can modify Visio file properties after you save your drawing by choosing File > Properties, and then saving the drawing again.*
4. Click OK.

   *After you save your drawing, the program displays the name of the drawing on the Visio program window title bar.*
5. Choose File > Close to close your drawing.

**FILE ICONS AND EXTENSIONS**

| | |
|---|---|
|  | **Template (.VST)** |
|  | **Stencil (.VSS)** |
|  | **Drawing (.VSD)** |

**Slide 12**

## Presentation on Module recap

Summarize the skills covered in this module using the module recap. Check for understanding by asking the students questions about the skills they learned in this module and answer any questions the students have.

## Module recap

- ☑ Start the Visio program.
- ☑ Identify and open Visio files: templates, stencils, and drawings.
- ☑ Become familiar with the Visio drawing environment and customize it.
- ☑ Become familiar with Visio templates, stencils, and SmartShapes symbols.
- ☑ Display, reposition, and close stencils.
- ☑ Drag and drop shapes.
- ☑ Use shape control handles and shortcut menus.
- ☑ Save and close drawings.

***Open file:***
**\\Training**
**\Pancom**
**\Pancom Sales.vst**

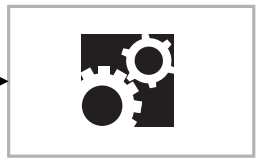
***Reference file:***
**\\Training**
**\M1**
**\Pancom Sales Diagram.vsd**

## Presentation on Putting it all together

Introduce the exercise scenario by briefly reading the exercise steps and opening the completed drawing.

### To complete the exercise:

1. Make sure everyone understands how to complete the exercise, and give them direction when necessary.
2. Follow the procedure.
3. If the students finish early, they can complete the Challenging you more exercise. They can also experiment with other Visio templates.



# Putting it all together

## EXERCISE SCENARIO

You are in the sales department at Pancom, and your boss wants you to create a vendor/customer relationship diagram for a presentation he is giving in 30 minutes. You're in a panic, but you remember that one of your coworkers created a custom Visio template and stencil for your department, especially for sales diagrams. You decide to take a look at the template to see if you can create the diagram.

### To complete the exercise:

1. Choose File > New > Browse Templates, navigate to the \\Training\Pancom folder, and then open Pancom Sales.vst.

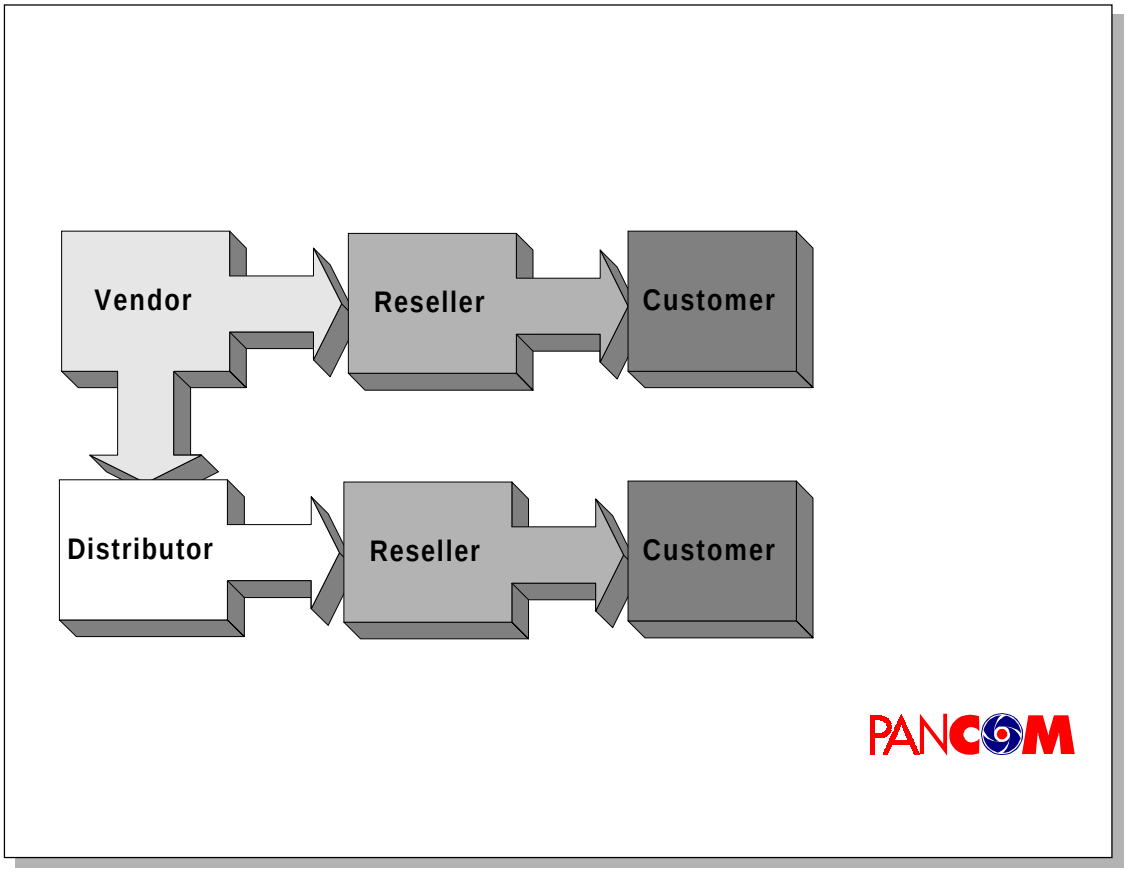
   **Create the drawing**

   - Use shapes on the Pancom stencil to complete the drawing on the next page.
   - Add text to the shapes.
   - Center the drawing on the drawing page.

2. Use the View menu to hide the grid and rulers.
3. Save your drawing as *Pancom Sales Diagram.vsd* in the \Training\My Drawings folder and include a file description.

**Seeing your shapes better**

Zoom in on the drawing page, using the keyboard shortcuts, to see your shapes better and to practice positioning them precisely.


Vendor
Reseller
Customer
Distributor
Reseller
Customer
PANCOM

## Presentation on Challenging you more

Walk around the room and help the students working on this exercise.

### Scenario 1 solution

1. Choose View > Full Screen to view a Visio drawing in the full-screen view.

   *Usually you use the arrow keys to move between pages; however, the drawing created in the exercise includes only one page. Also, right-click the window to see a shortcut menu with presentation options.*

2. Press the Esc key to exit the full-screen view.

### Scenario 2 solution

1. Choose File > Properties, modify the drawing properties, and then click OK.
2. Save your drawing again.

### Scenario 3 solution

1. Choose Tools > Center Drawing.
2. Save your drawing again.

## Challenging you more

If you finish your drawing quickly and want to learn more about the Visio program, try to solve these problems. If you can't find the solution to the problem by experimenting with the program, use online assistance by choosing Help > Visio Help to solve the problem.

### Scenario 1

Your boss wants to use the drawing in his presentation, so he needs to use the full-screen view. How do you present a Visio drawing in full-screen view? How do you exit the full-screen view?

### Scenario 2

After you saved your drawing, you realized you made a mistake when entering the drawing properties. How do you change drawing properties after you save your drawing?

### Scenario 3

After checking your drawing for the final time, you realized your drawing isn't centered. How do you quickly center your drawing?