

# **Visio 2013 Workshop**



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# **Visio 2013: Fundamentals**

## **Course Description**

This Visio 2013 hands-on course will provide students with the skills necessary to use the functions and features of Microsoft Visio 2013 to create, edit and save Visio diagrams for flow charts, organizational charts, floor plans and workflows.

## **Learning Objectives:**

- Navigate in Visio and customize the ribbon
- Create a basic flow chart
- Create an organizational chart using the chart wizard
- Create floor plans with furniture and equipment
- Create database entity relationship diagrams
- Format shapes and connectors

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# Visio 2013 Workshop

## Unit 1 Getting Started with Visio 2013

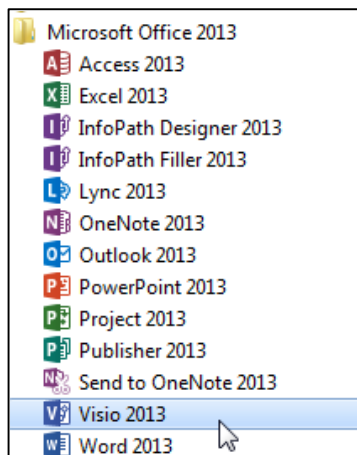
### Topic 1 Introducing Visio 2013

Visio 2013 is a program to create charts and diagrams with data analysis. This program is very useful for:

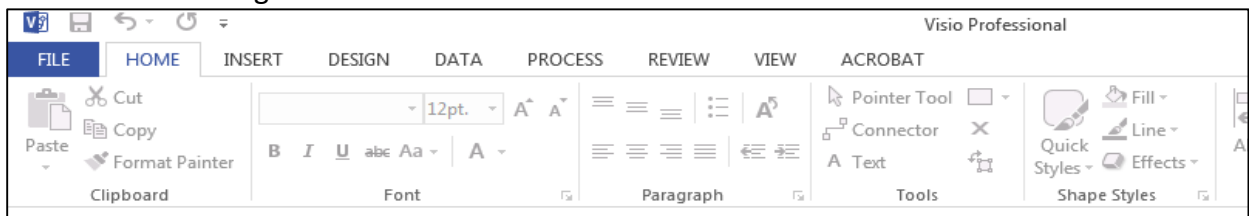
1. Organizational charts
2. Floor layouts
3. Flow charts
4. Data analysis

### Topic 2 Creating a New Chart in Visio 2013

1. Select **Start>>All Programs>>Microsoft Office>>Visio 2013**



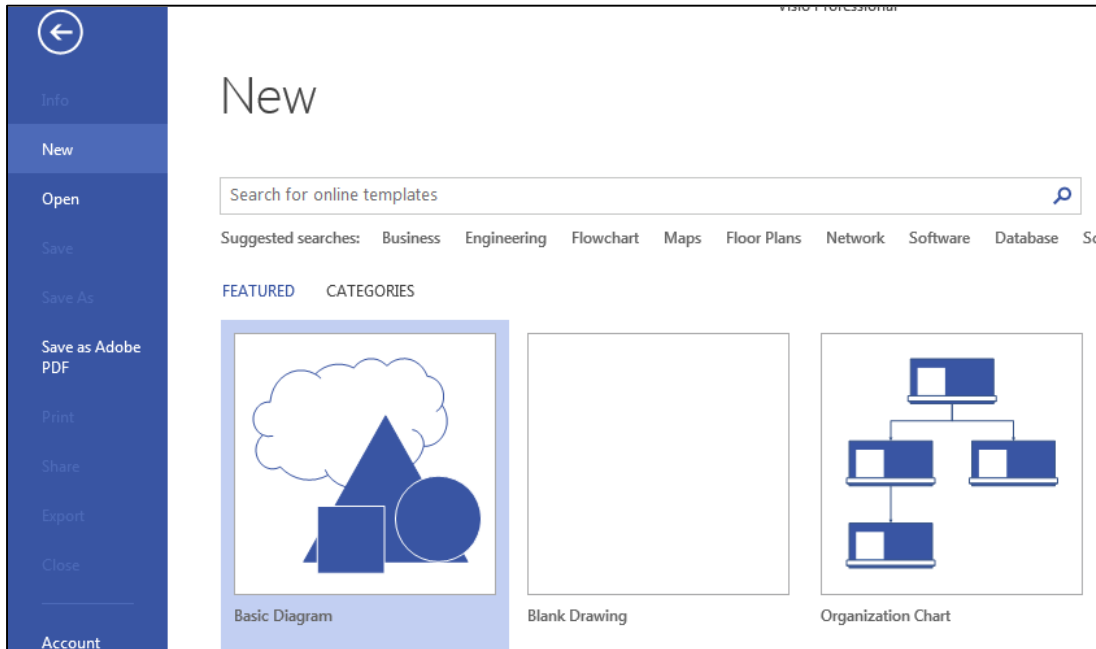
2. Visio will open a new desktop ready to use. You will see tabs, such as **Home**, **Insert**, etc., with functions along what is called a ribbon.



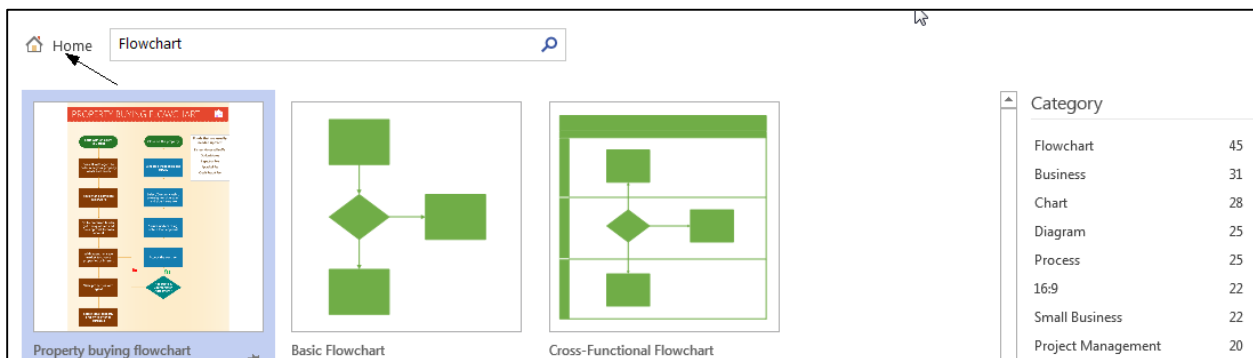
### Topic 3 Exploring the Visio 2013 Interface

1. There are many templates for organizational charts in Visio 2013. You can select one that is close to your needs and then adapt it using the Visio tools.

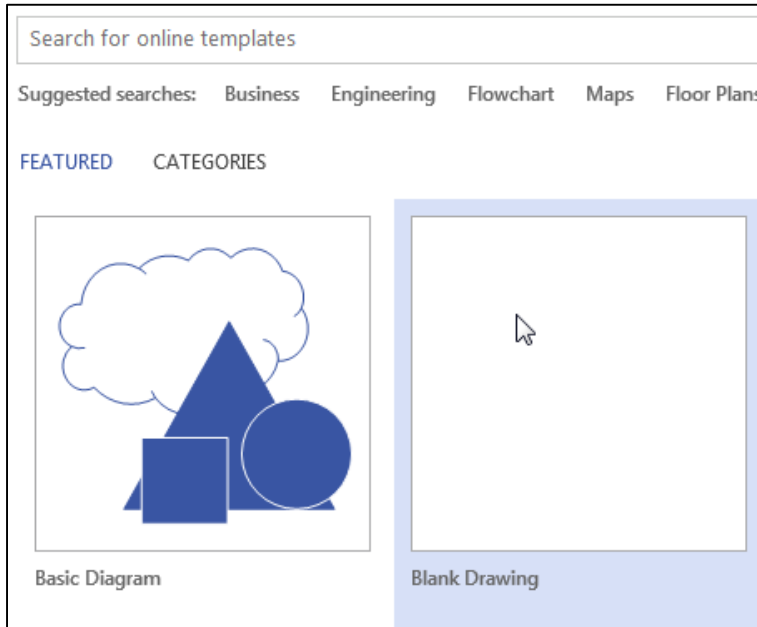
Click File>>New and you will see diagrams for many different work needs.



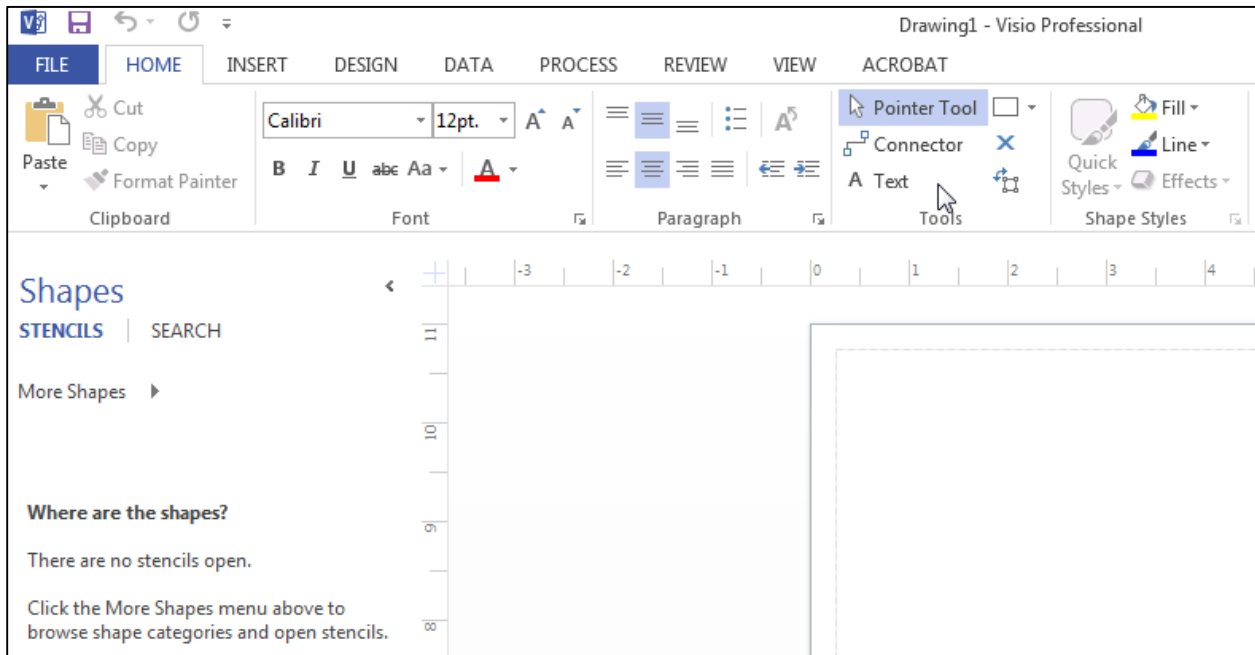
2. You can search for templates or use the suggested searches. If you select “Flowchart” you will get many different types of flow charts with categories on the side. Click the **Home** link to go back.



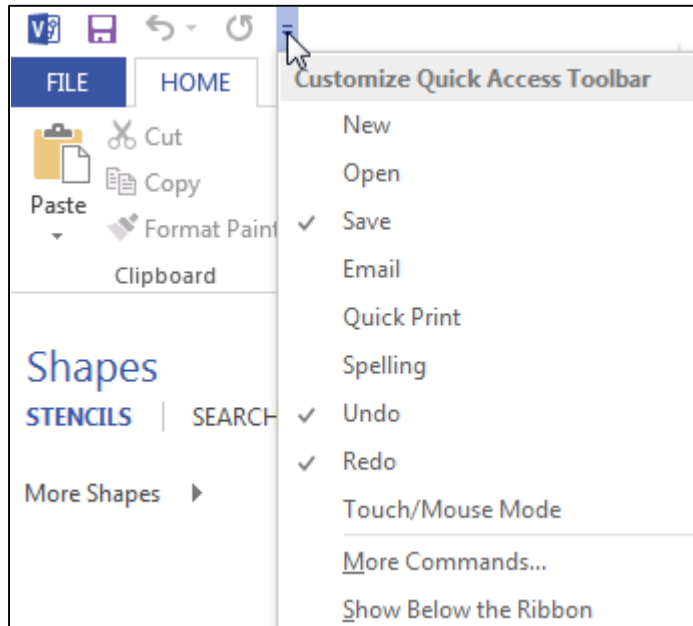
3. We will select a “blank drawing” to explore the toolbars.



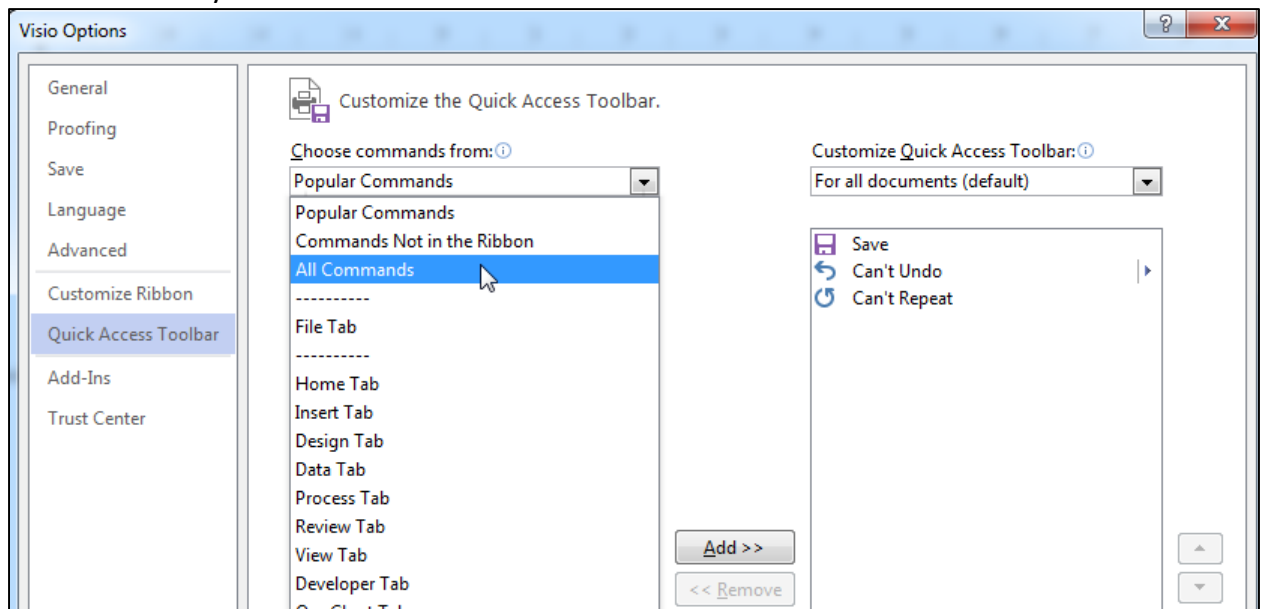
4. The Home ribbon is very similar to the MS Word ribbon with Font, Paragraph, Tools but there is a Shapes Stencils area on the left we will explore



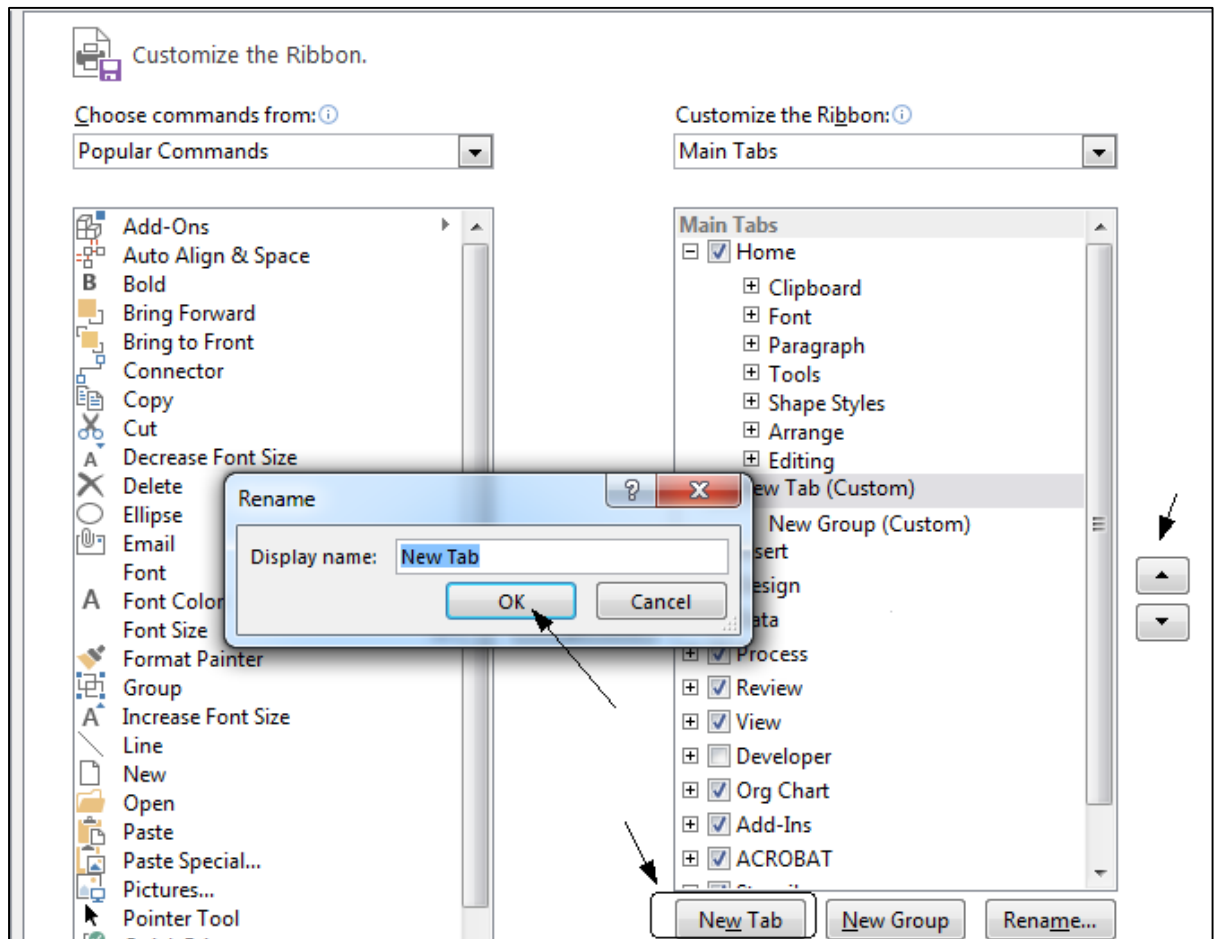
5. You can customize the “Quick Access” Toolbar. Use the dropdown and select the features you will use most often.



6. You can select **More Commands** to find others you want to use. Click All Commands then add those you need such as “Print.”



7. You can also customize the ribbon using this dialog window. For example you could make a new tab with your commands. Select New Tab and right click on it to rename it then add your commands. You can position it where you want it.



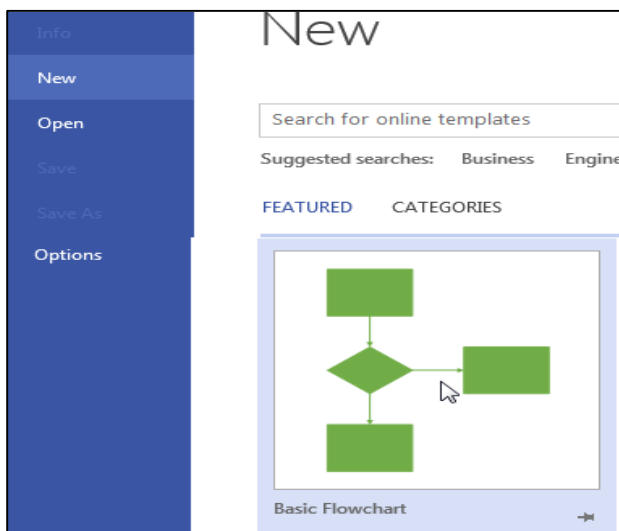


## Topic 4 Creating a New Flow Chart Diagram using a Template

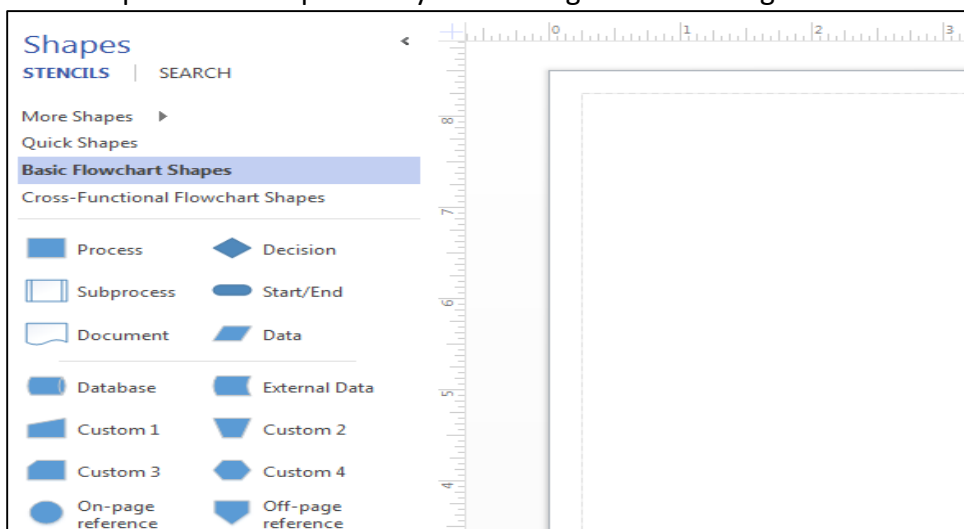
Rather than creating a new diagram completely from scratch, it is very easy to select a template and then adapt it to your needs.

### Steps:

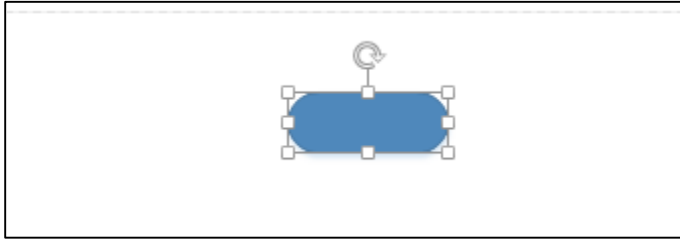
1. Select **File>>New** and you will see many templates that you can use. We will start with a basic flow chart. Select the basic flowchart and click Create.



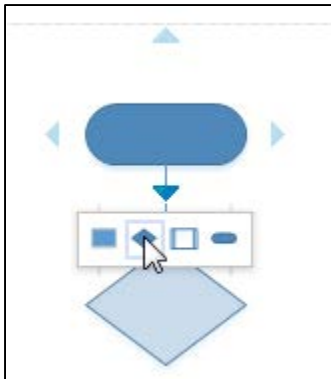
2. Visio opens with shapes that you can drag onto the design area.



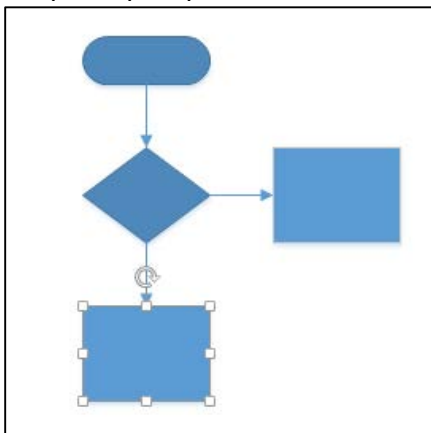
3. We will add a Start shape. Click and drag it to the design area. You will see handles you can use to expand or compact it as well as new tools in the ribbon to change its color.



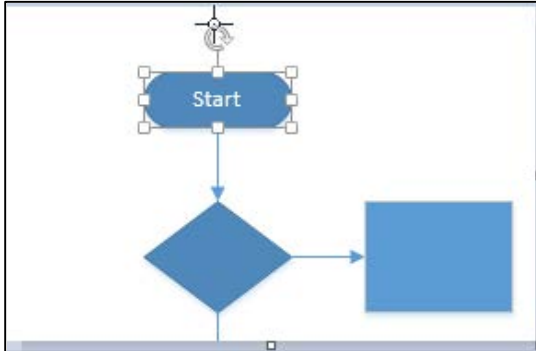
4. You can move your mouse over the middle bottom handle and an arrow will appear. If you move over the area a quick shape box appears and you can add perhaps a decision.



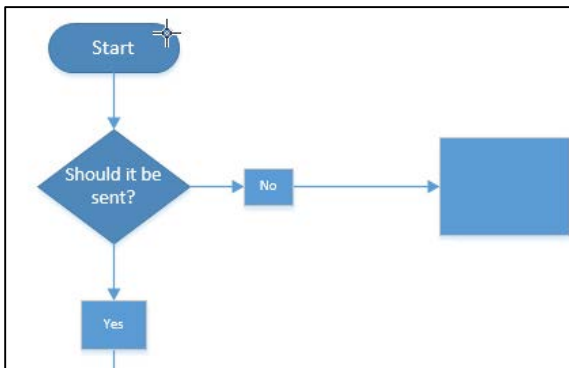
5. If you move to the side of the decision shape you will see an arrow and then can add perhaps a process.



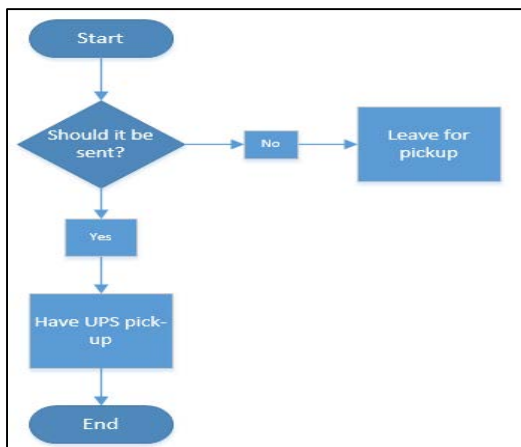
6. You can click inside a shape to open it to add text. You can easily change the font size and color as well as adjust the size of the shapes.



7. You could add decision answers on the arrows.



8. Continue with your flow chart as long as the process continues then place the end shape.

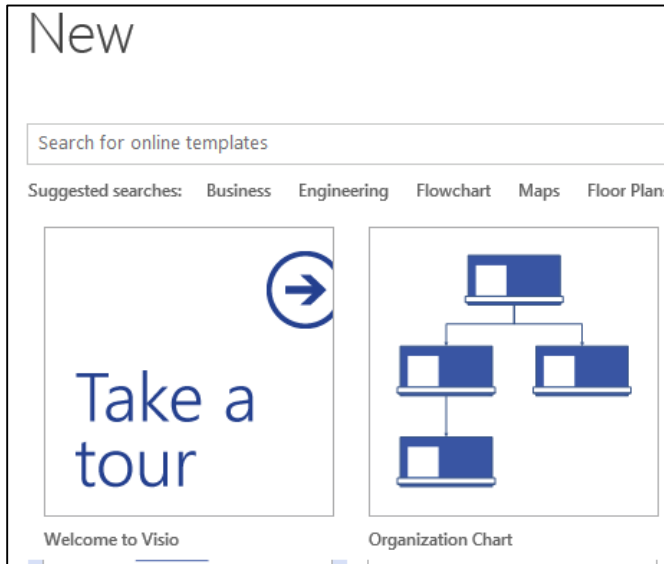


## Unit 2 Creating an Organizational Chart

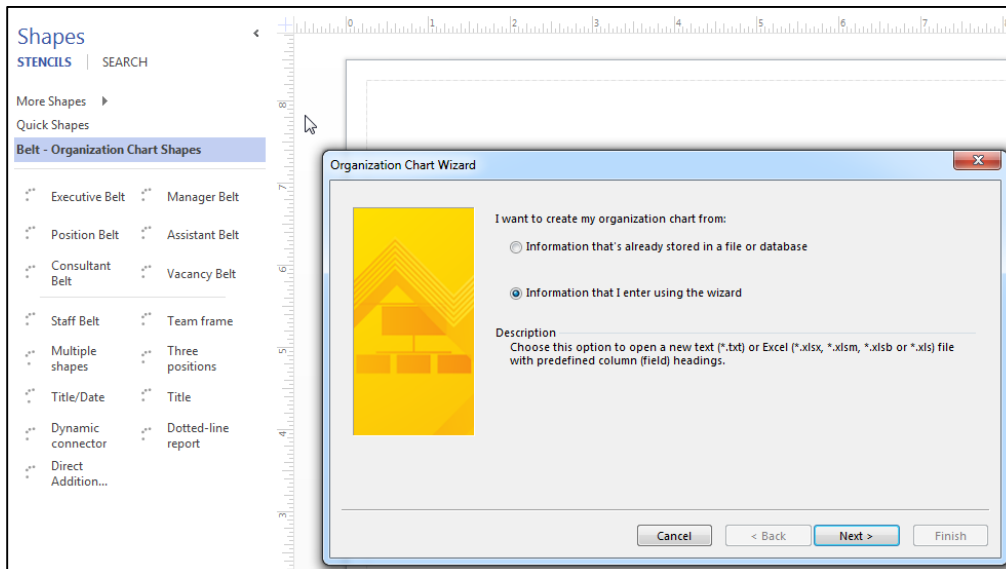
### Topic 1 Creating an Organizational Chart using a Template

#### Steps:

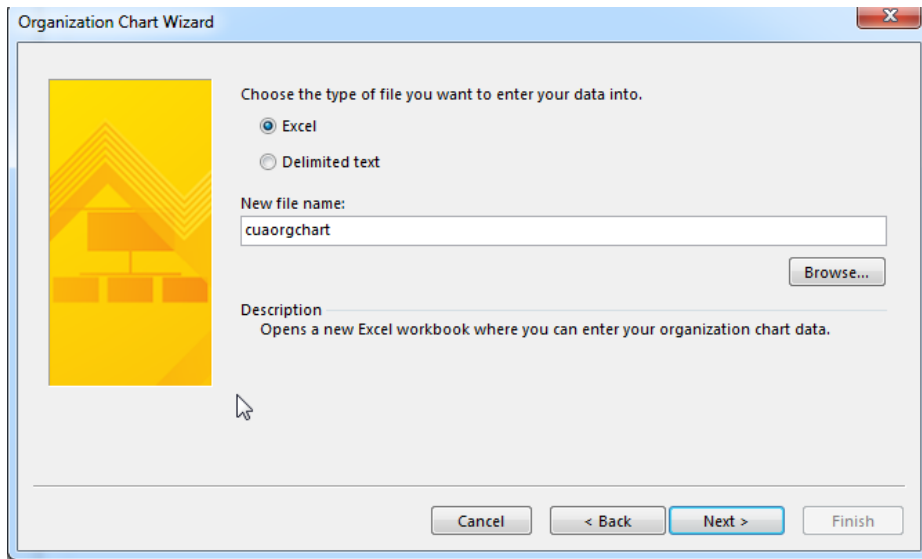
1. Select **File>>New** and you will see the organization templates. Select the basic organizational chart and click **Create**.



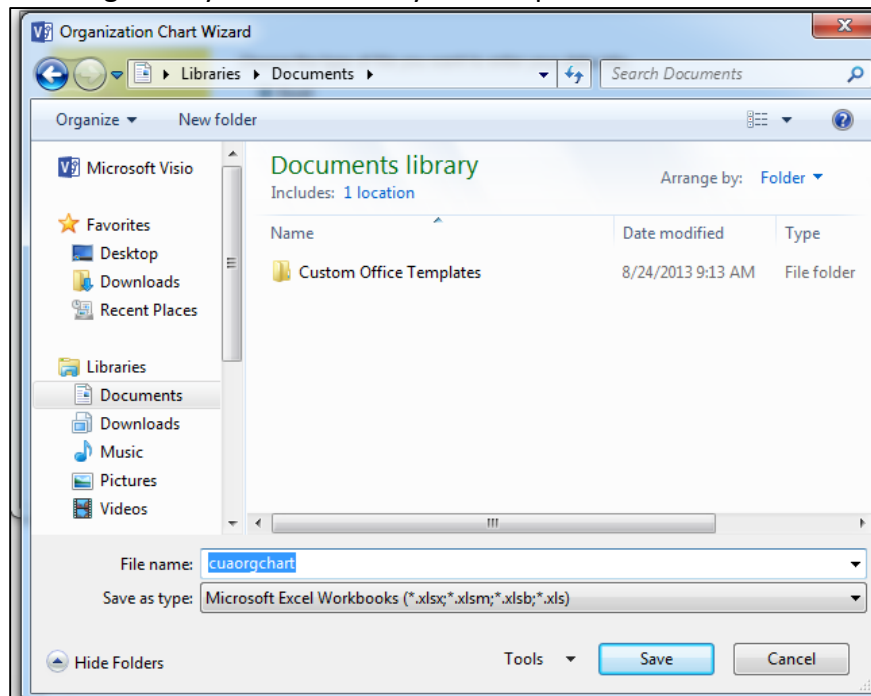
2. Here we will have access to a chart wizard. Select **“Information that I enter using the wizard.”**



3. Select Excel and name your file then browse to where you want to save the file.



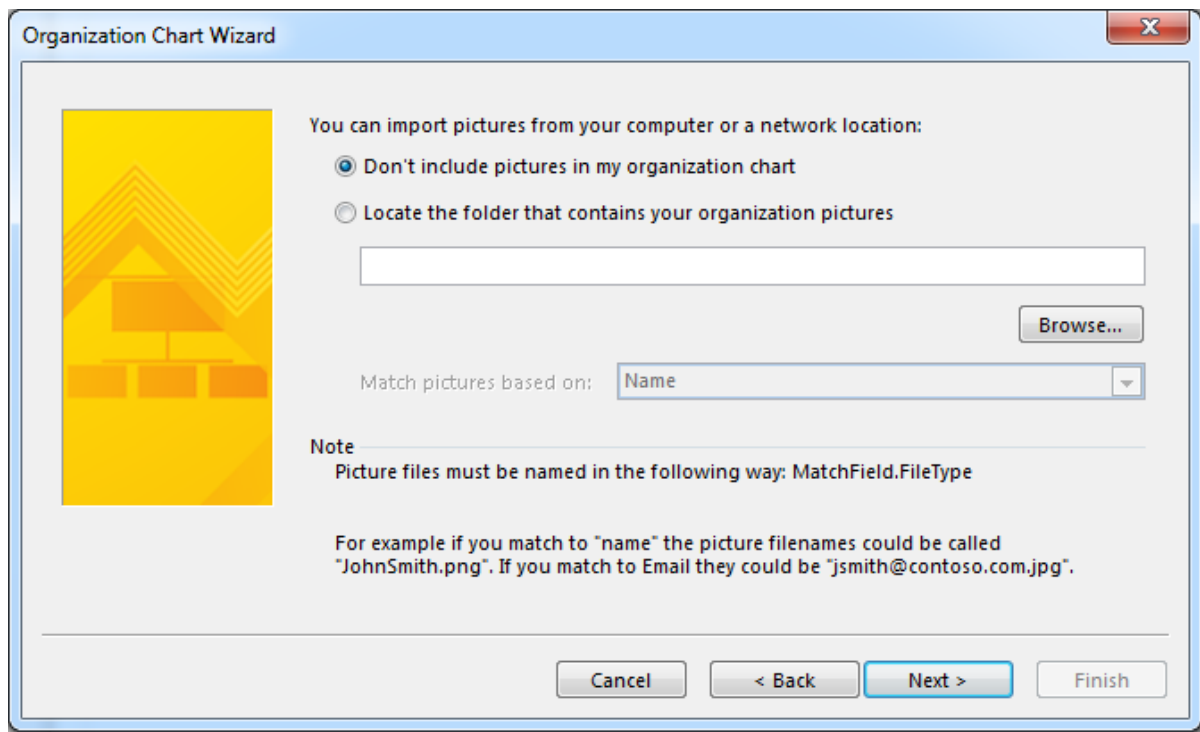
4. Navigate to your folder and you will open an Excel file.



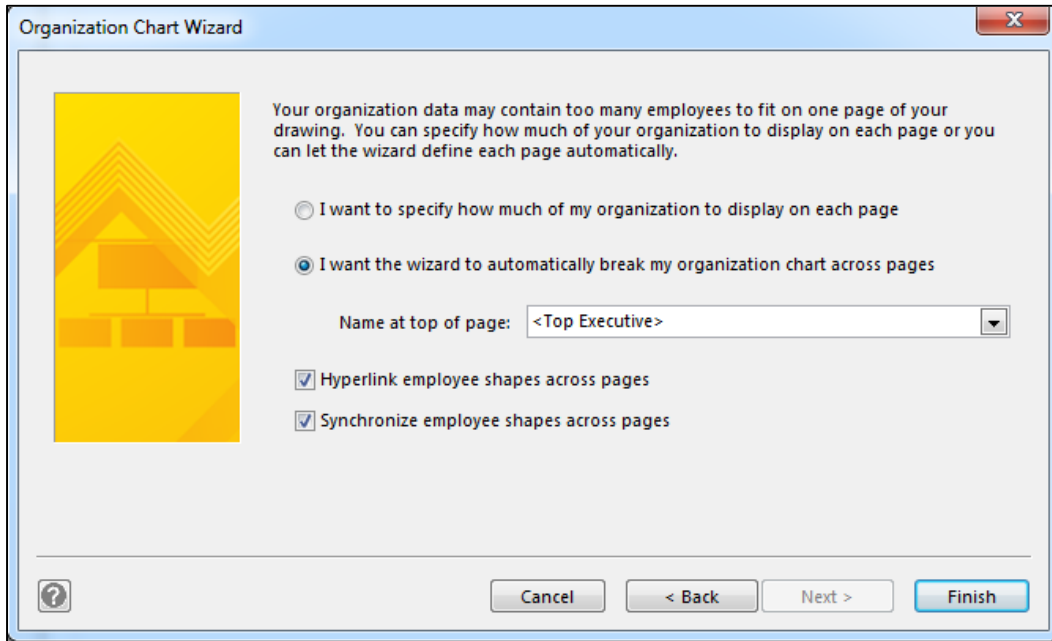
5. You can enter data into the Excel Workbook. For now just enter your name and Dept.

	A	B	C	D	E
1	<b>Name</b>	<b>Reports_to</b>	<b>Title</b>	<b>Department</b>	<b>Telephone</b>
2					
3	Joe Sampleboss		CEO	Executive	x5555
4	Jane Samplemgr	Joe Sampleboss	Development Manager	Product Development	x6666
5	John Samplepos	Jane Samplemgr	Software Developer	Product Development	x6667
6	Joan Weeks	Joe Sampleboss	Lab Manager	CUA LIS	x6129
7	+				

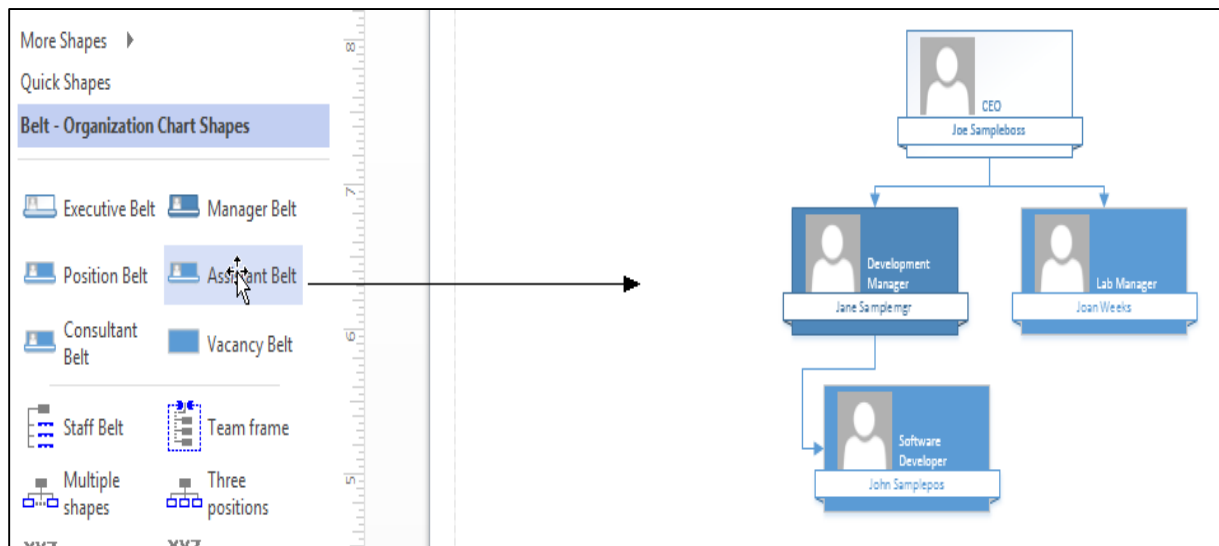
6. Save and close the workbook to return to the wizard. You will be asked if you want to include pictures. Leave it **“Don’t include pictures...”** and we can add them later. Click **Next**.



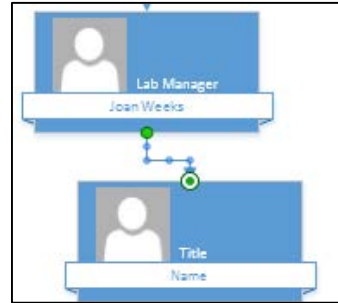
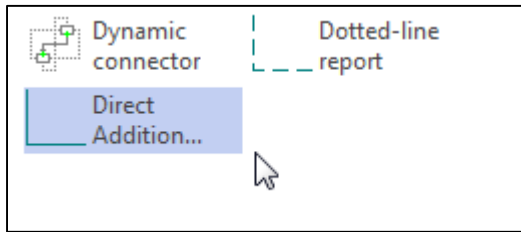
7. Decide if you want the chart to break across pages. Leave the default and click finish.



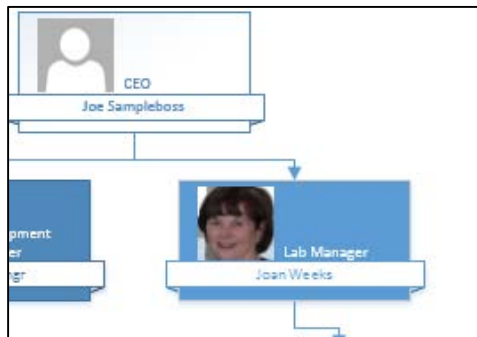
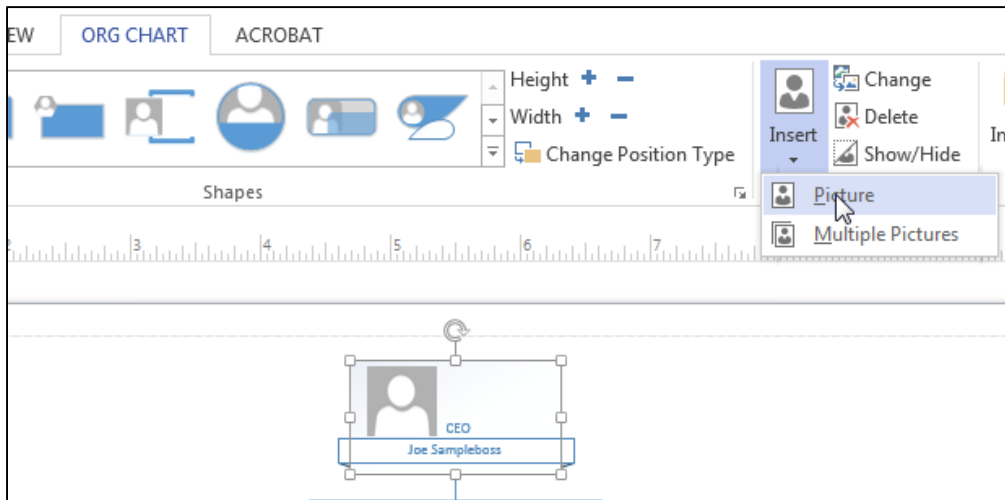
8. You will see your org chart and can add a “belt” by dragging it to the org chart.



9. You can add a connector by dragging it until the chart box turns green and then you can roll your mouse over the connector and position it as you want.



10. You can add pictures if you have them in a folder by clicking on the Org Chart ribbon and Insert Picture. You can right click on a picture at: <http://lis.cua.edu/directory/faculty.cfm> and save it in your My documents folder then select a sample box on the chart and insert the picture



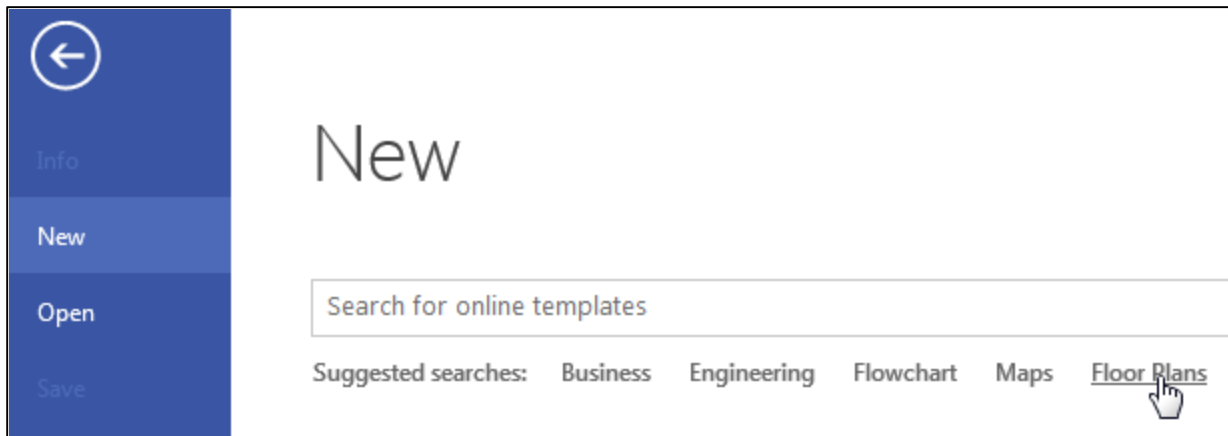


## Unit 3 Creating Floor Plans in Visio

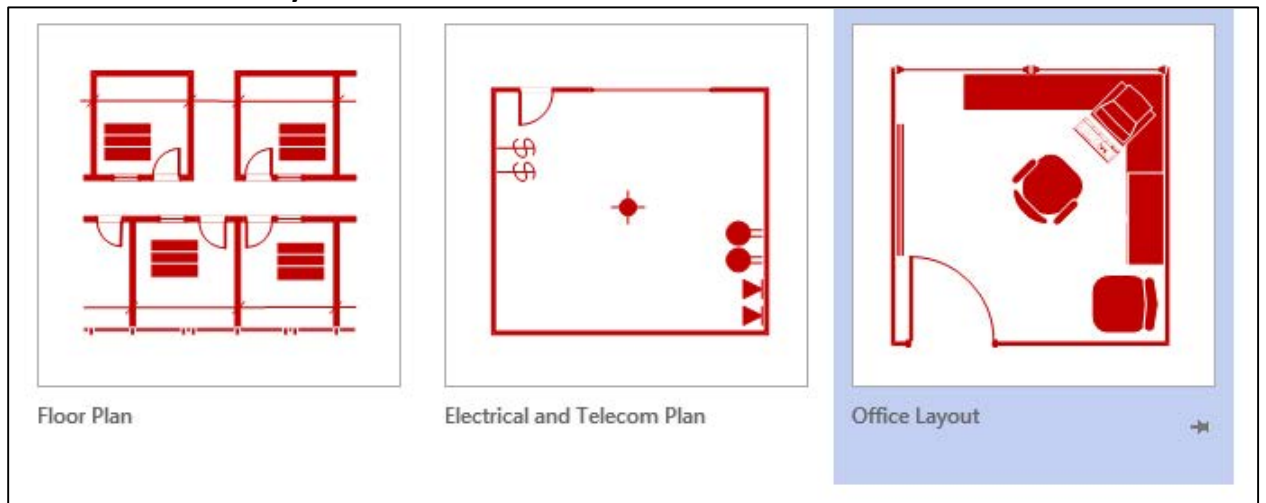
### Topic 1 Selecting a Floor Plan

#### Steps:

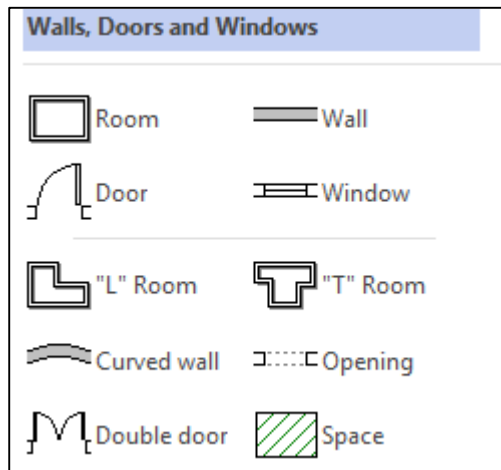
1. Select File>>New and click on the link for Floor Plans.



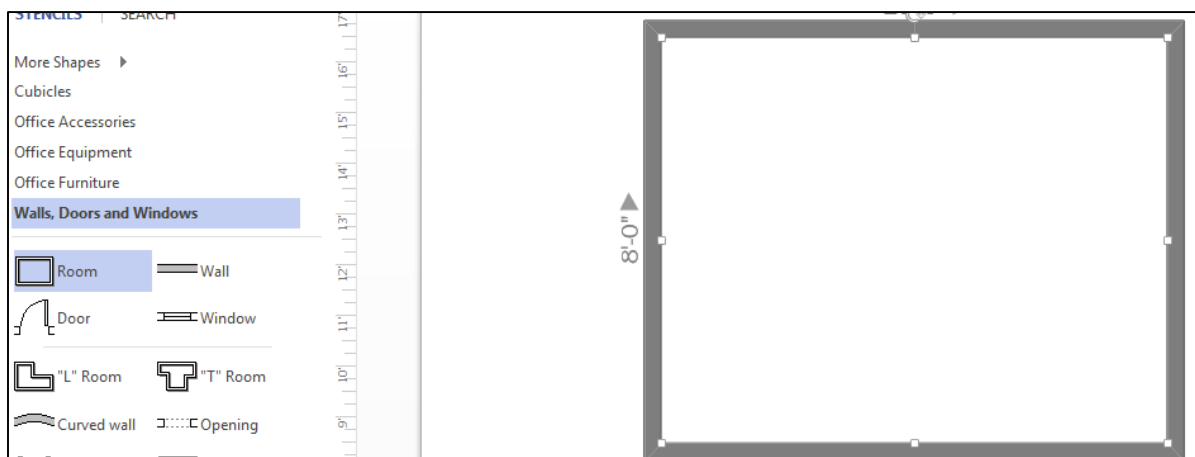
2. We selected **Office Layout** for this exercise.



3. Select Visio Drawing and view the shapes.

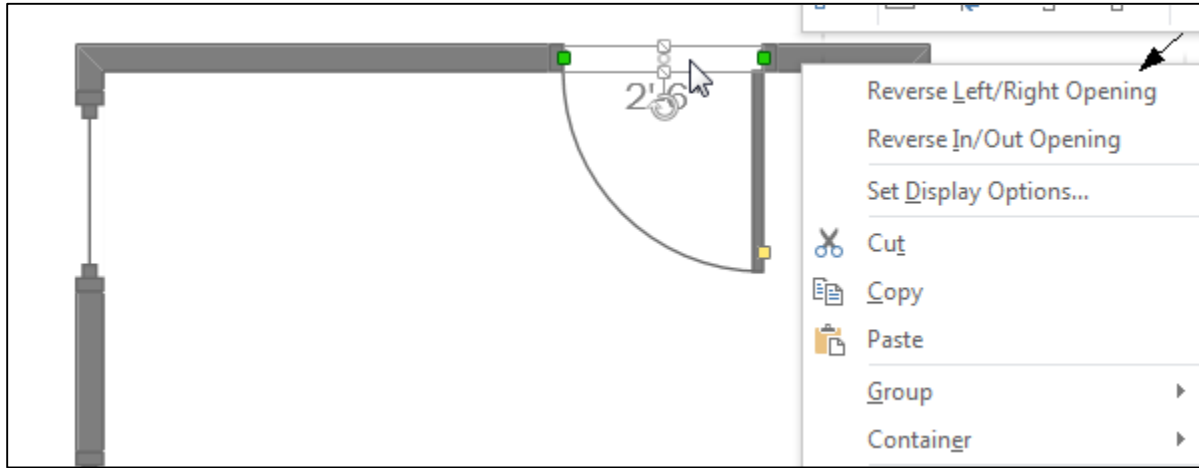


4. Start with the shape of the room. Click and drag it to the desktop.

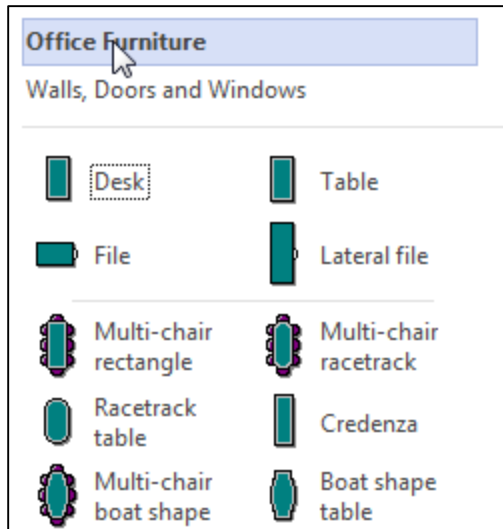


5. Click and drag windows and doors to the room walls.

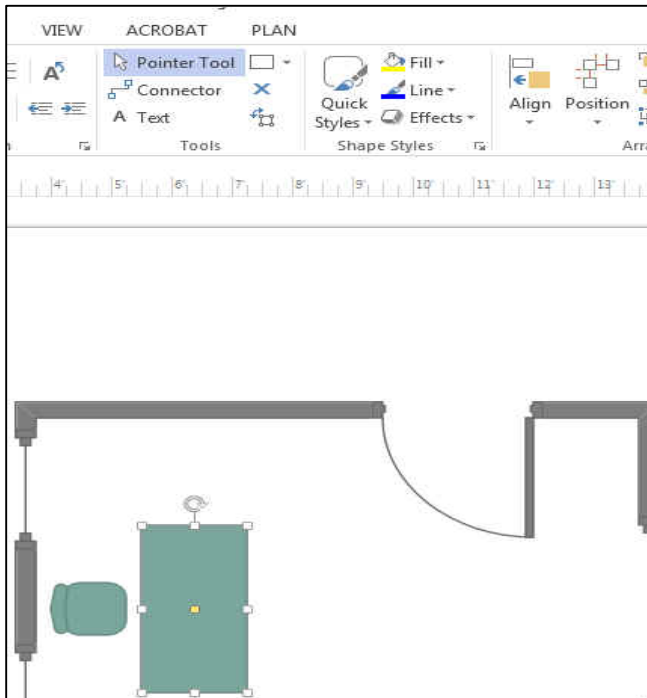
6. Right click to reverse the door opening **left/ right** or **in/out**.



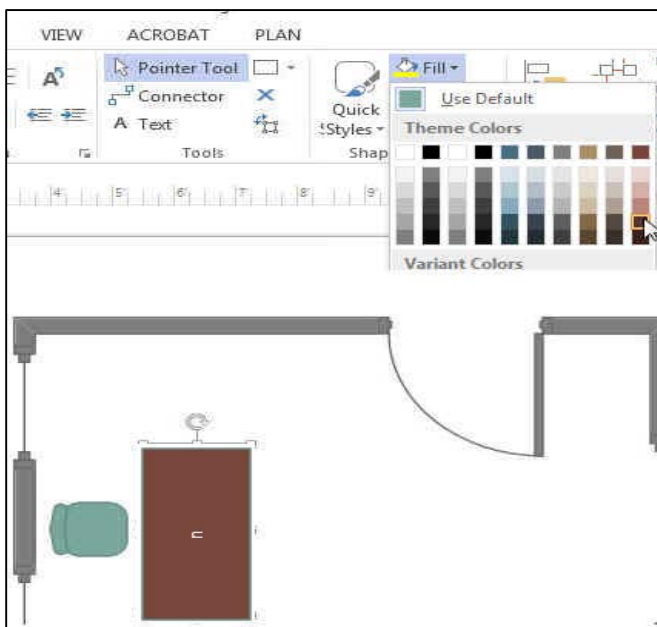
7. You can add furniture by clicking the link and the shapes will appear. Drag and drop them on the floor plan.



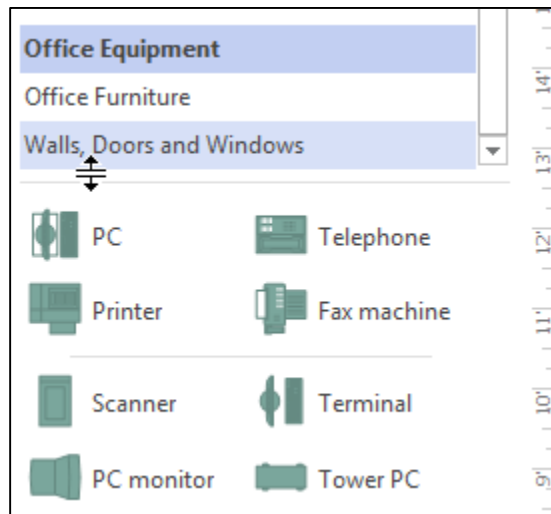
8. You can resize the furniture by clicking on the handles.



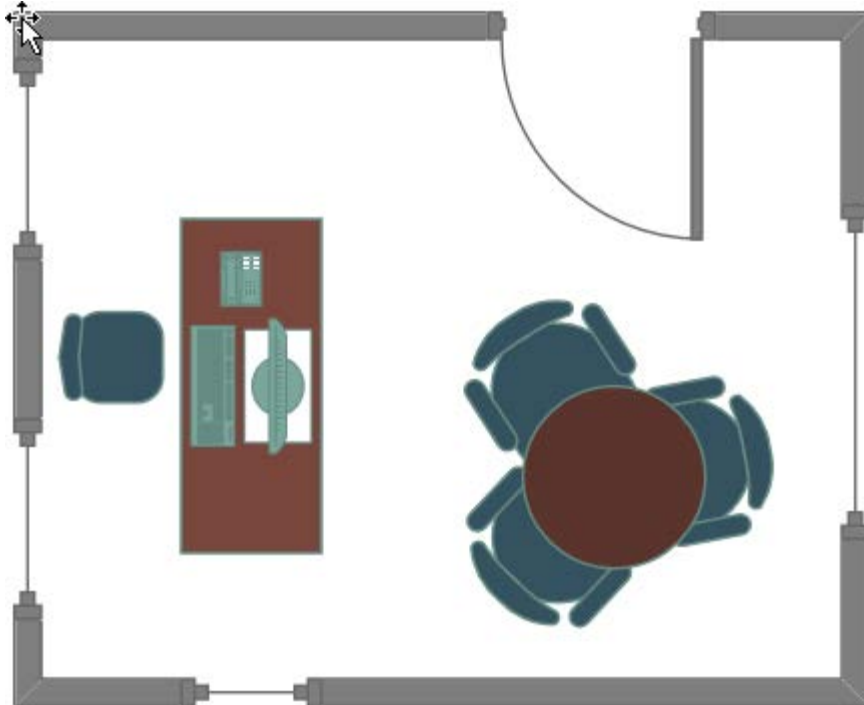
9. You can change the colors by selecting the Fill bucket.



10. You can add “**Office Equipment**” by clicking on the link and dragging the item to the drawing area.



11. When you are finished, you can select **File>>Save as** and choose a file format to suit your needs.

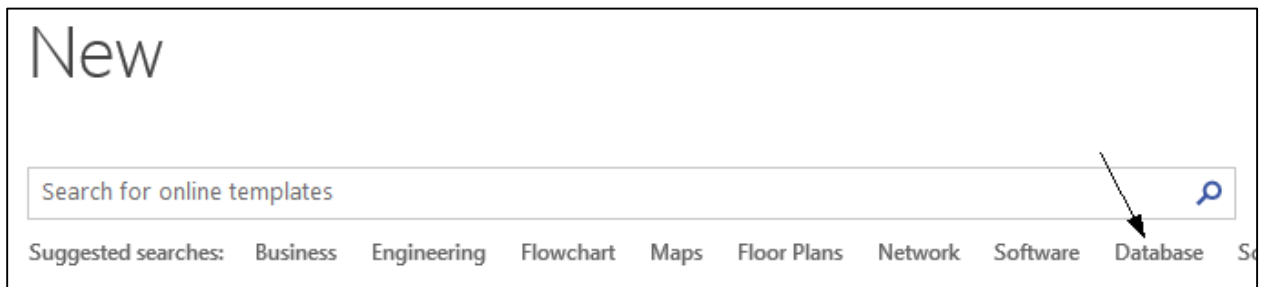


## Unit 4 Creating Entity Relationship Diagram for a Database

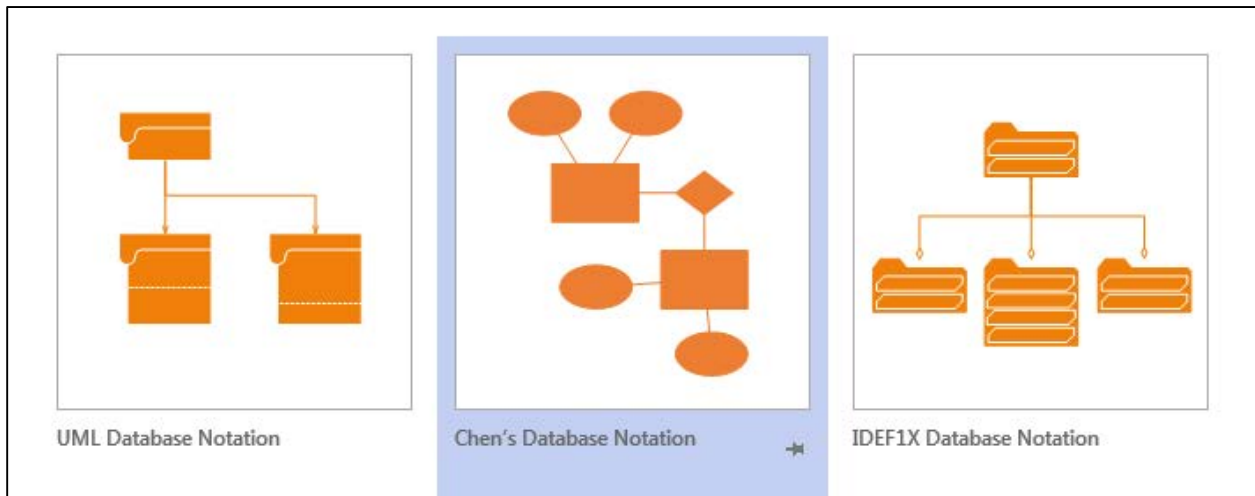
### Topic 1 Choosing a diagram

Steps:

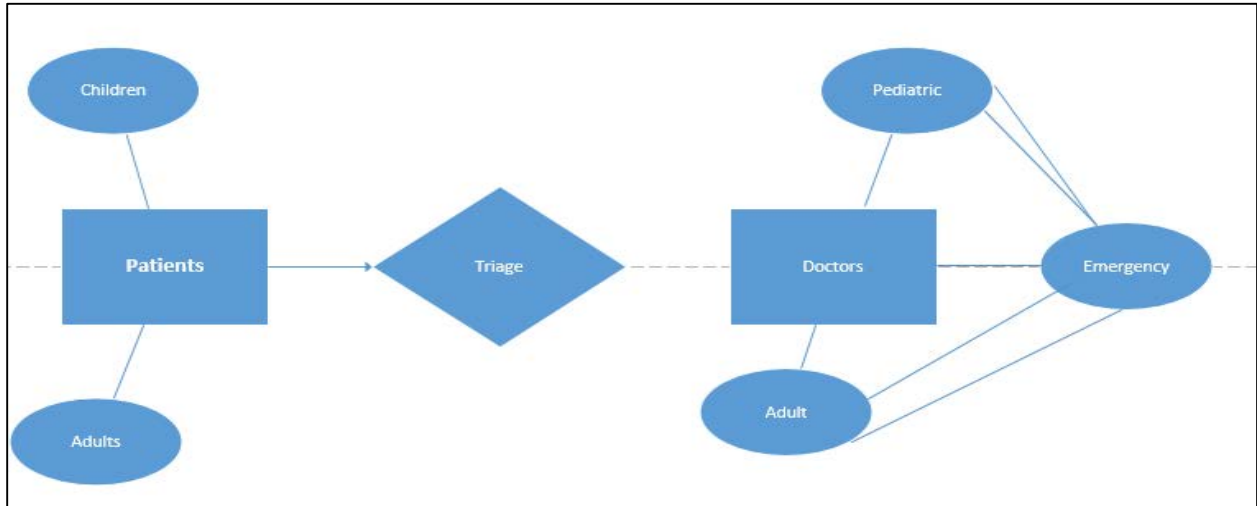
1. Select **File>>New** and the **Database** link.



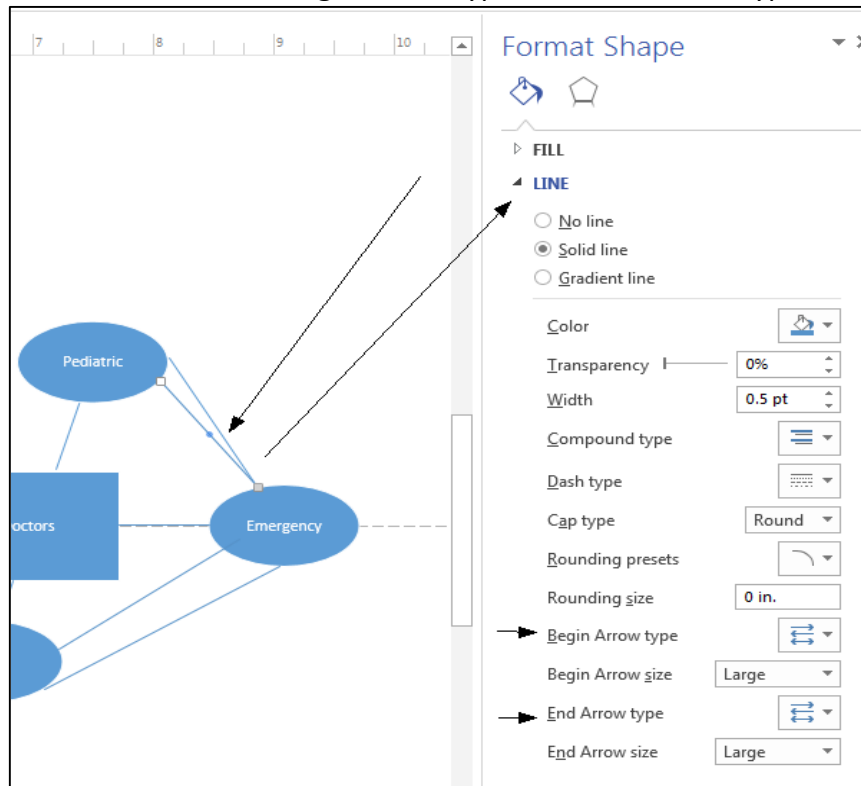
2. For this exercise select Chen's Database notation.



3. Select the shapes needed for the Entity, Relationships and connectors. In this exercise, create patients, doctors and relationships.



4. To create arrows select a connector and then in **Format Shape** in the left panel select **Line** and choose either a **Begin Arrow** type or an **End Arrow** type.



5. Save your drawing.