

MS VISIO 2016

Introduction

Visio is a program that allows you to create :

- Flowchart diagrams / Procedure diagrams
- Organization charts
- Space/Floor Management
- Maps
- Site Maps
- Brainstorming diagrams

and almost any type of diagram you can think of...

Welcome Screen

The welcome screen gives you access to the latest documents created and to several type of graph templates. For ease of use, click on **categories** to access a structured list of templates:

The screenshot displays the Microsoft Visio welcome screen. On the left, a blue sidebar contains the 'Visio' logo, a 'Recent' section with 'Pinned' and 'Last Week' document lists, and an 'Older' section. The main area features a search bar and tabs for 'FEATURED', 'PERSONAL', and 'CATEGORIES' (which is circled in red). Below the tabs is a grid of 12 diagram templates, each with a preview image and a label: 'Basic Diagram', 'Blank Drawing', 'Cross-Functional Flowchart', 'Basic Flowchart', 'Organization Chart', 'Detailed Network Diagram', 'Timeline', 'Cross-Functional Flowchart', and three more templates in the bottom row.

Visio

Recent

Pinned

- network diagram kleudge.vsdX Documents » Kleudge
- facebook ads 2015.vsdX Documents » Facebook

Last Week

- internal influences.vsdX Documents » AUB » Consumer Behavior » Internal Influences

Older

- elections_organizationChart.vsdX O: » Library.2 » Massoud Achkar » 2016
- lpn.vsdX Documents » USJ » 2016 » Univ. de Rennes
- plan.vsdX Documents » College Melkart » 2016 » hardware-infrastructure
- programme 2016.vsdX O: » Library.2 » Massoud Achkar
- fil rouge.vsdX Documents » Doctorat » _Thèse
- consumer behavior2.vsdX Documents » AUB
- consumer behavior.vsdX Documents » AUB
- marketing.vsdX Documents » Lumen

Open Other Drawings

Search for online templates

Suggested searches: Flowcharts Network Technology Charts Education Software Floor Plans

FEATURED PERSONAL **CATEGORIES**

Basic Diagram

Blank Drawing

Cross-Functional Flowchart

Basic Flowchart

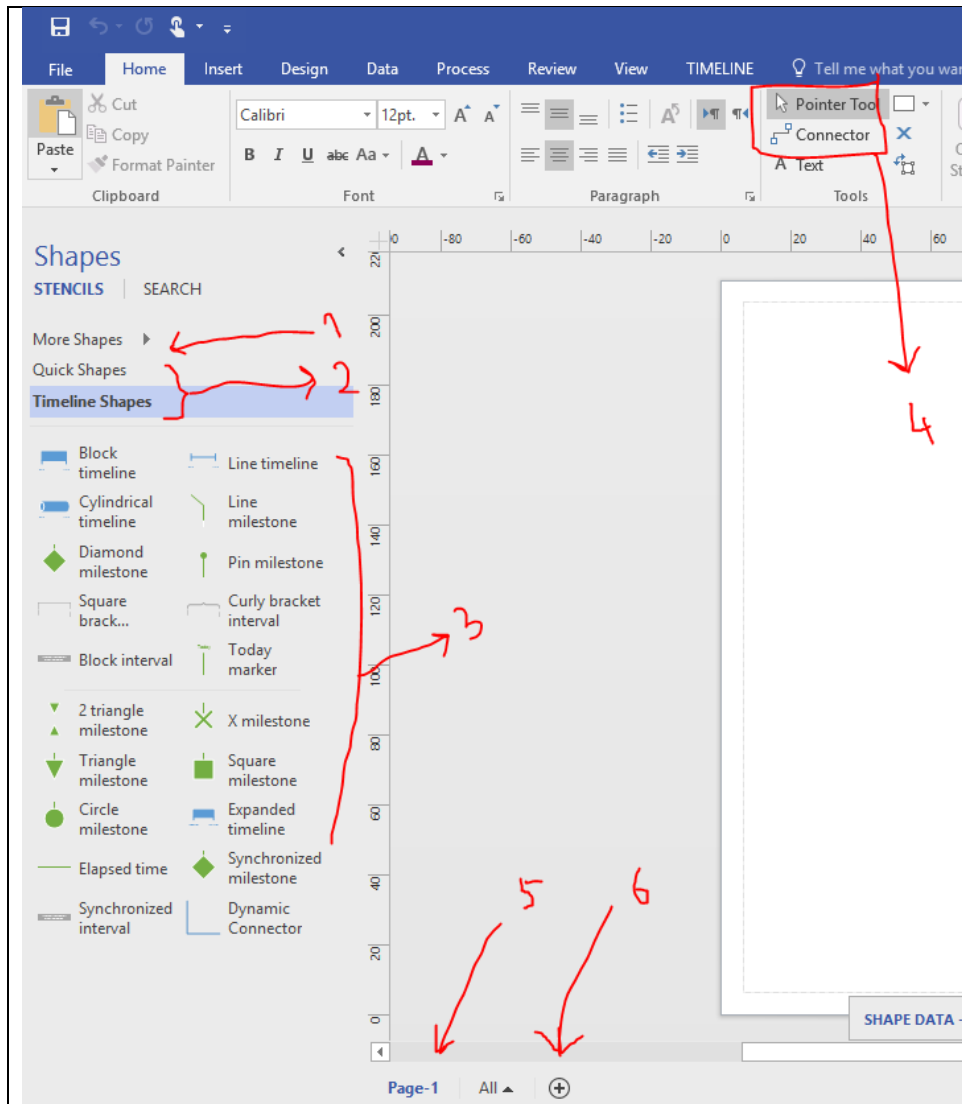
Organization Chart

Detailed Network Diagram

Timeline

Cross-Functional Flowchart

The Visio Interface



1- Access to other stencils (group of shapes)

2- Switch between opened stencils

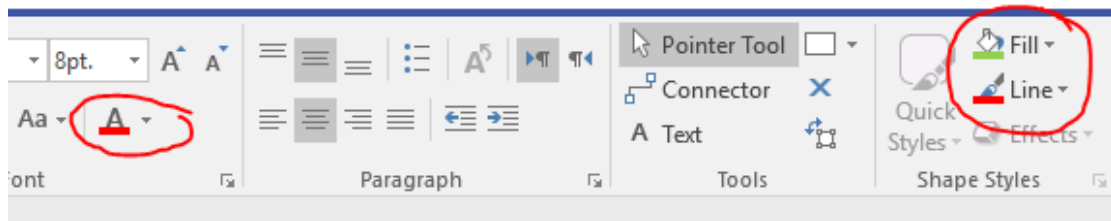
3- Shapes

4- Most important tools in Visio: pointer to select, move and resize shapes; and connector to connect shapes.

5- Current page. Double click to rename.

6- Add a new page to the document

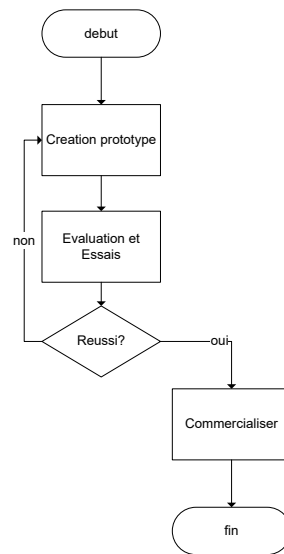
- The format and standard toolbars are the same as the ones in other Microsoft Office programs (Word, Excel...). They help you change fonts, colors, paragraph alignment, etc.



- Color Buttons (screenshot above) allow you to:
 - o Change the color of text
 - o Change the filling color of the shape
 - o Change the color of the contouring lines for shapes or the color of the connecting lines
- Stencil shapes : drag and drop instances of the shapes on the page
- The pointer, connector and text tools are the most important tools. The first one allows you to drag and drop shapes, and then reposition them. The second one allows you to connect shapes, and the third one lets you add text wherever you need on the page.

Exercise 1

- Drag and drop shapes
- Double click on a shape and type text
- Use the selection tool to move, resize or delete shapes (the “delete” key on the keyboard)
- Use the connector tool to connect shapes
- User insert → picture to insert a logo

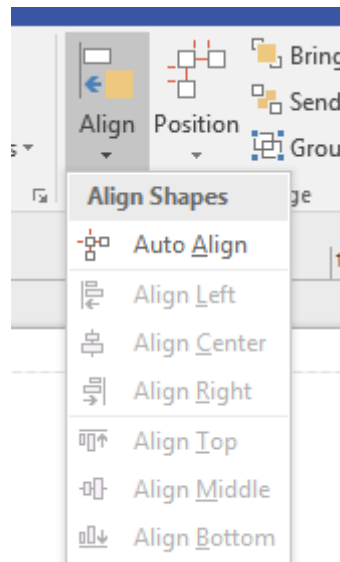


Notes:

- The losange shape is the “decision” shape. It has two outcomes (a “yes” and a “no”)
- You should always connect shapes using “connection points” – Visio will show you a green square with a “glue to connection point” message when you put your mouse over one of these points. The advantage of connection points is that connection lines will readjust and will not break when you move the shapes to a new position on the page.

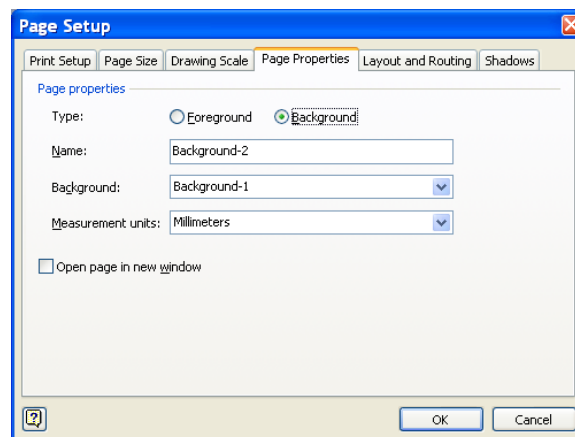
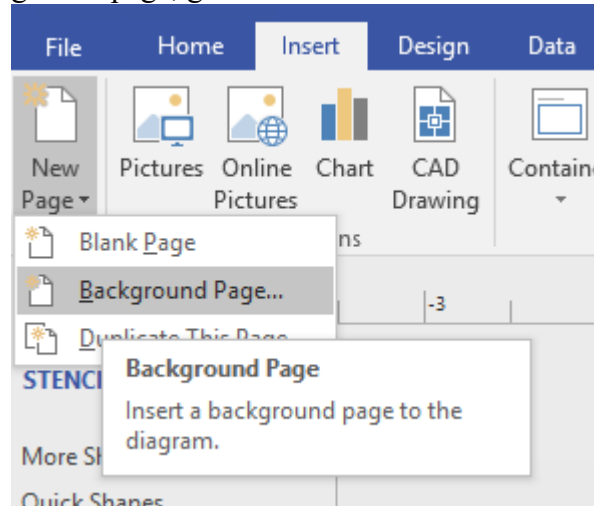
Basic Functions

- Select a shape : use the selection tool
- Select several shapes: draw a rectangle with the mouse around the shapes (click-keep your finger pressed – move the mouse in a rectangular shape – release) or ctrl+click on several shapes, one after the other
- Move a shape : click and drag using the selection tool
- Resize a shape: click on one of the handles (small squares around the shape) and drag outward or inward – put your finger on the ctrl key to resize proportionally
- Rotate a shape: click and move the small circular handle above the shape
- Delete a shape: click on a shape, press [delete]
- Write over a connector line: double click on the line, type your text
- Add a title to the page: use the text tool
- Align shapes: Select one or more shapes and use the align option – to distribute space evenly between shapes, use the “position” option:

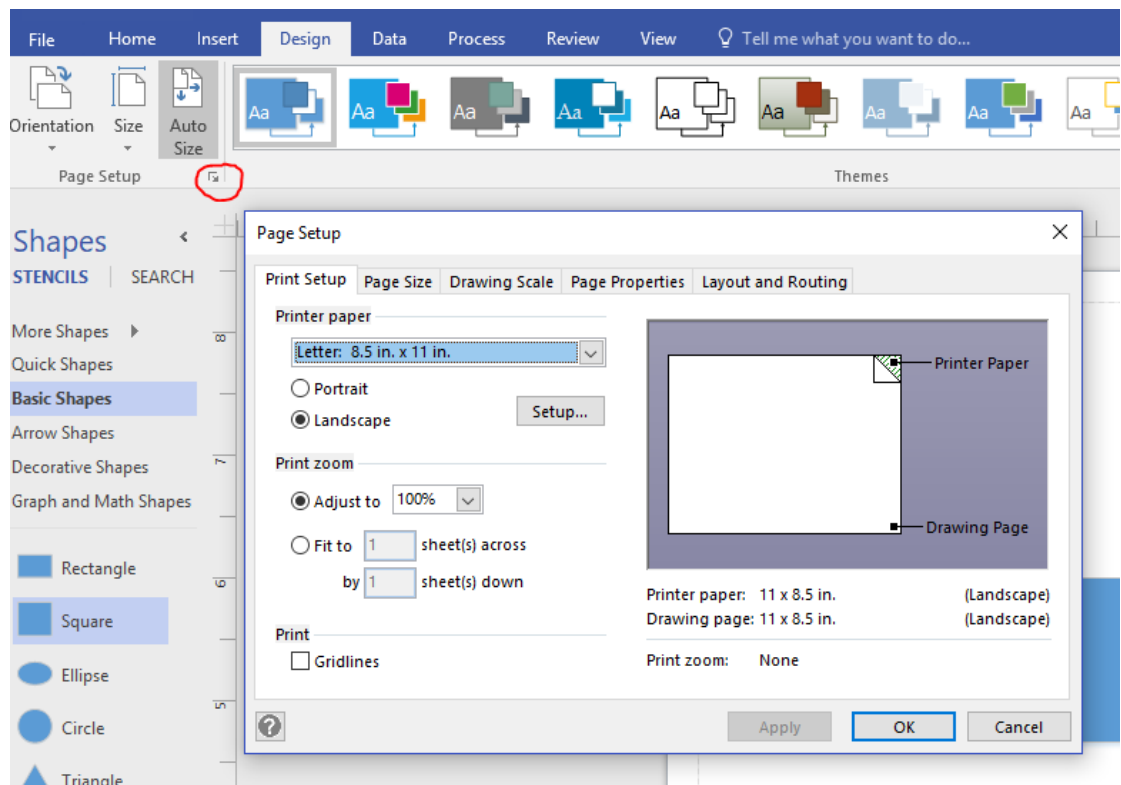


Background Pages

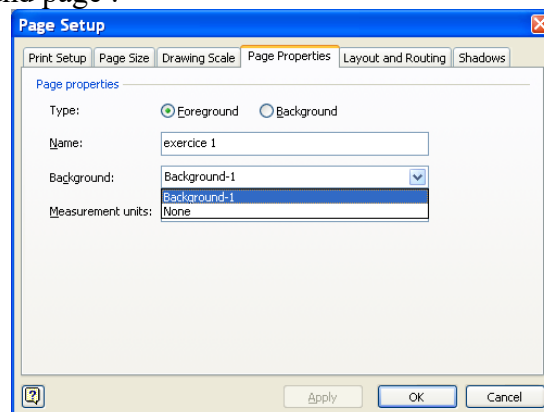
- To create a background page, go to insert and click on the arrow next to page:



- Insert an image or text on the page
- To use the background, go to any existing page, click on the small arrow in the design tab:



- Choose « page properties » from the set of tabs in page setup and pick the name of the background page :



Other functions

- Zoom
- Pane and zoom window
- F5 (full screen)
- Animate objects separately in PowerPoint
- Apply background to all pages

Créer un organigramme dans Visio

Le moyen le plus efficace pour créer un organigramme dans Visio est à partir d'une feuille Excel.

Dans la feuille Excel, deux colonnes sont obligatoires : le nom et le supérieur hiérarchique, les autres colonnes sont libres et seront utilisées ou bien dans les cases de l'organigramme ou bien dans les propriétés cachées de chaque case :

Name	Reports_to	Position	Departement	Phone_extension
Husni Khalil		PDG		1
Maya Khoury	Husni Khalil	DG	Marketing	2
Toni Khalil	Husni Khalil	DG	Sales	3
Georges Zakkour	Husni Khalil	DG	Production	4
Farid Habib	Maya Khoury	Advertising	Marketing	21
Samia Habib	Maya Khoury	News Bulletin	Marketing	22
Subhi Ghazal	Toni Khalil	Act Mgr	Sales	31
Andre Mansour	Toni Khalil	Act Mgr	Sales	32
Moustafa Hammoud	Georges Zakkour	worker	Production	41
Aline Mansour	Georges Zakkour	worker	Production	
Fadia Zahra	Georges Zakkour	worker	Production	

Attention à ne pas faire d'erreur dans la façon d'écrire les noms entre la colonne « name » et la colonne « reports_to ». Autrement, l'organigramme sera erroné. On peut aussi remplacer le nom par un numéro et utiliser une troisième colonne « real name ».

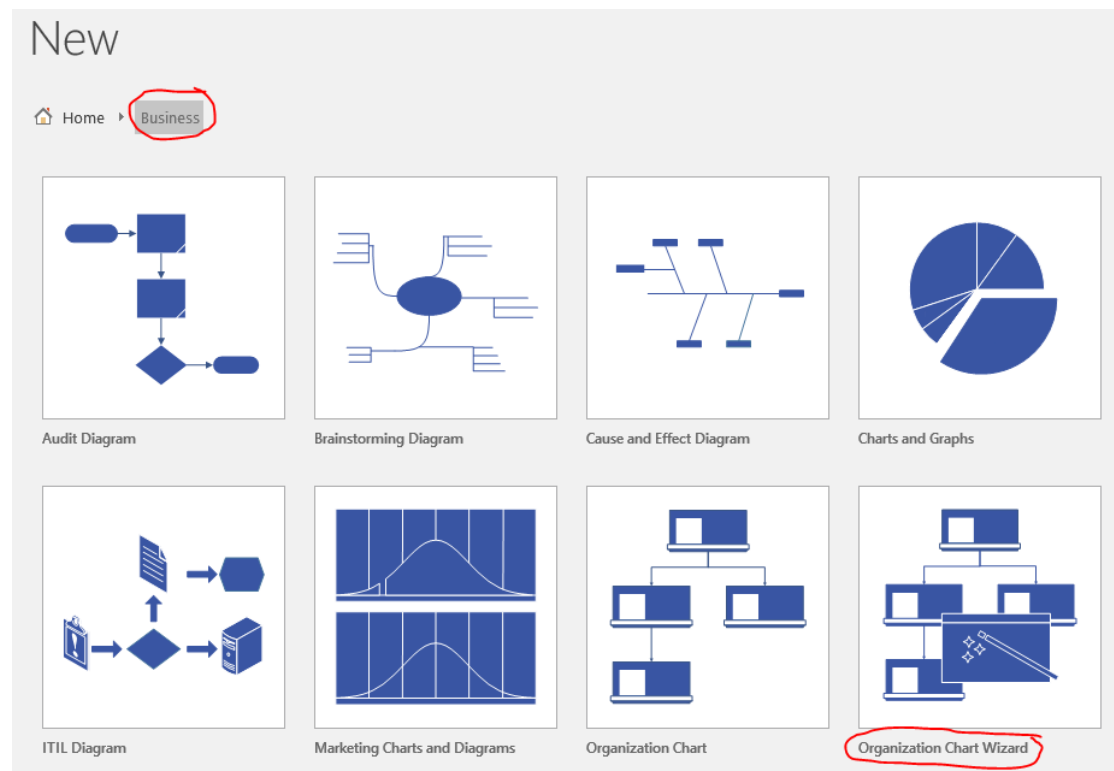
Enregistrer le fichier Excel et fermer le document (pour qu'il n'y ait pas un conflit d'accès au fichier entre Excel et Visio).

Dans visio, choisir l'option « organization chart wizard » de la catégorie « business ». Noter que l'option « organization chart » permet de créer un organigramme manuellement sans passer par Excel.

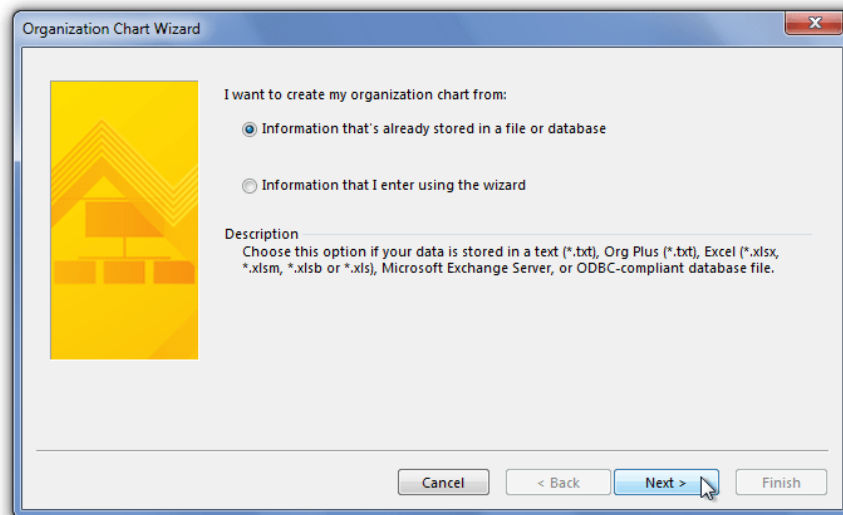
First off, launch MS Excel and create a simple spreadsheet as shown in the screenshot below. There are two mandatory fields: the name and the supervisor – everything else is optional. It's also worth mentioning here that you should consider adding personal details along with professional data of the employee. In the following spreadsheet, you can only see the phone details, however, you can choose to add complete office address (like cabin/room number), work and home phone number, years of service etc. Once you've added the required organization chart details, save the datasheet and give it an appropriate name.

	A	B	C	D	E	F
	Name	Supervisor	Designation	Department	Phone	
1						
2						
3	Martin Lee		President	Executive	045-666688	
4	Bon Joseph	Martin Lee	Deptt. Head	Research & Development	034-555522	
5	Kilmer Ali	Martin Lee	Software Analyst	Software Development	021-345687	
6	Hyte Namdaf	Kilmer Ali	Software Project Lead	Software Development	013-987987	
7	Neil O' Brian	Bon Joseph	Business Development Manager	Research & Development	098-827645	
8	Terry Hughs	Neil O' Brian	Assistant Manager	Research & Development	012-467281	
9	Jack McFaden	Hyte Namdaf	Sr. Software Developer	Software Development	034-673892	
10	Seth Yuri	Hyte Namdaf	Sr. Software Developer	Software Development	018-349765	
11	Robert Dylan	Hyte Namdaf	Sr. Software Developer	Software Development	014-578391	
12	Tina Suri	Terry Hughs	Internee	Research & Development	097-892197	
13	Gina Tee	Terry Hughs	Internee	Research & Development	082-129367	

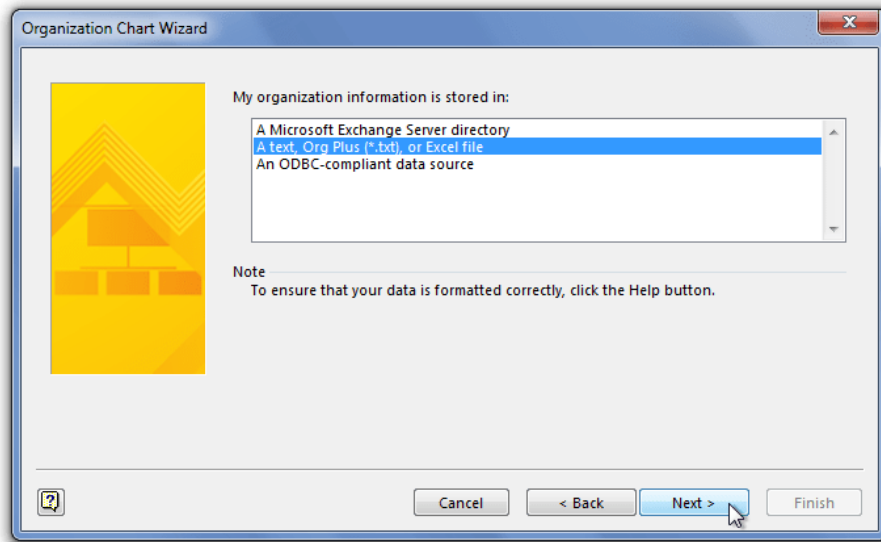
Now, launch MS Visio and select “organization chart wizard” from the business category



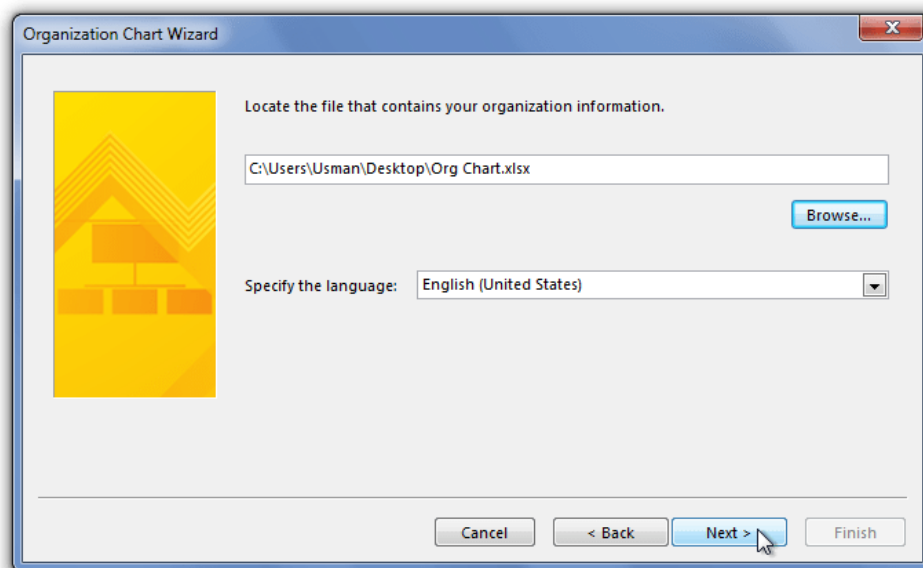
This will start the wizard that guides you through the process of importing Excel sheet and defining employees positions in order to automatically draw the organization chart. In the first step, select *Information that's already stored in a file or database* option and hit Next.



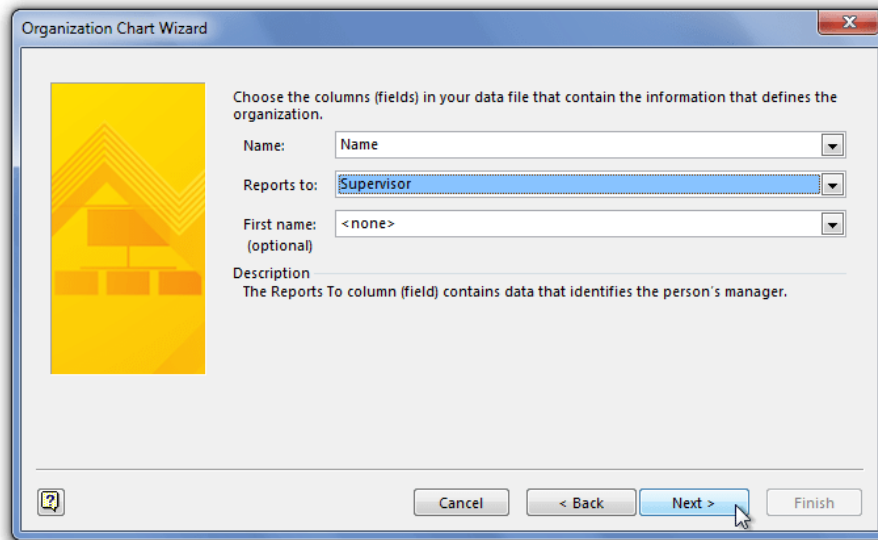
In the following window, you need to choose the data source. Since you've already created a datasheet in Excel, just select *A text, Org Plus (*.txt), Excel file* option and click Next.



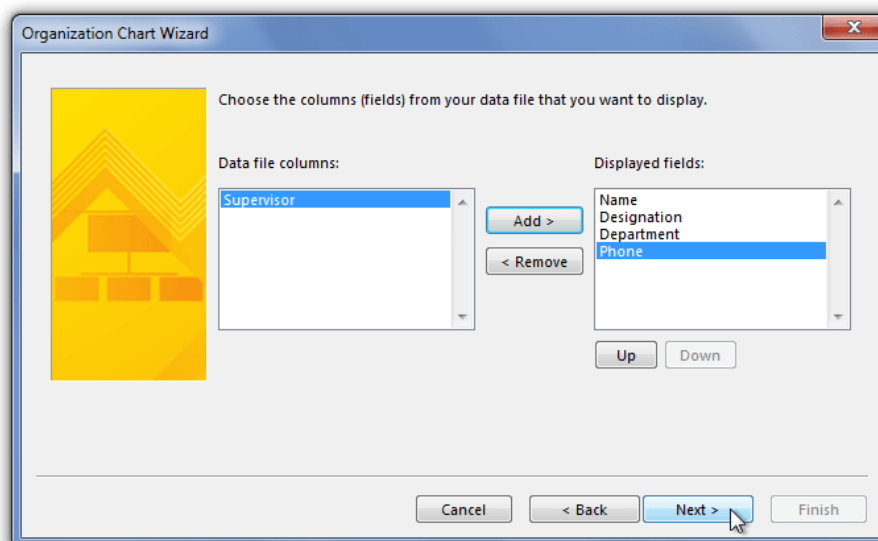
Now, simply select the source Excel spreadsheet file followed by the language and then hit Next.



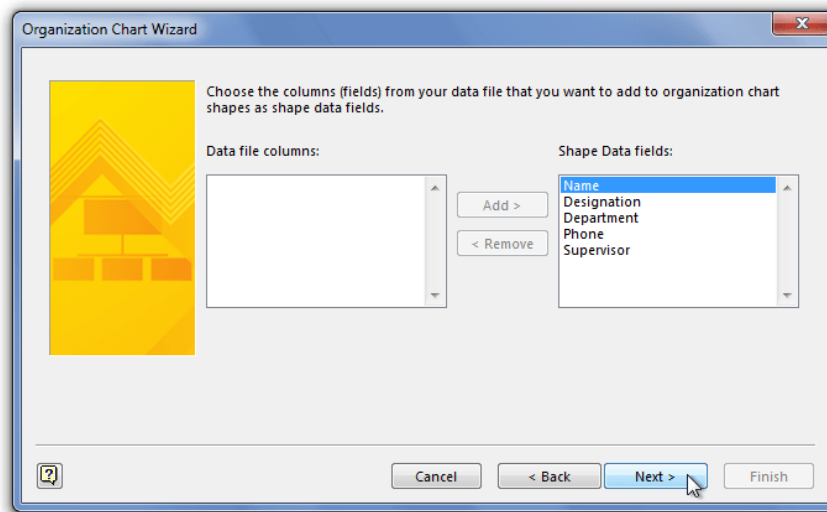
This step is important, as it asks you to specify the fields that help the wizard understand the basic structure of the organization. It basically asks you to specify the two fields, which contain the names of the employees and the names of their supervisors, respectively. Now, first select the field that contains all the names of the employees, and in *Report to* drop down menu, select the *Supervisor* field.



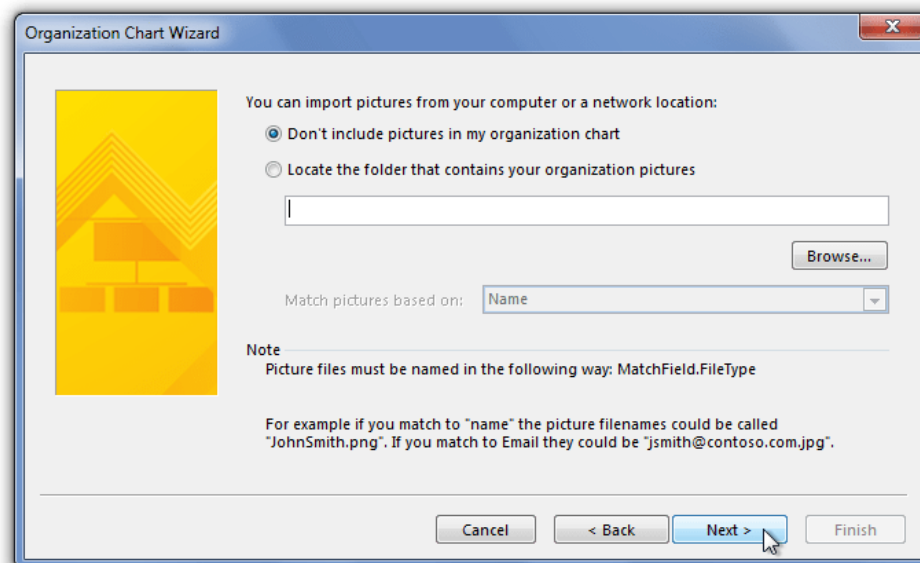
In this step, you need to add all those fields that you want to show in an employee box details box. Add all the fields in the organization chart dataset, except the Supervisor field. You can also choose to select Supervisor field, but the reason why you won't need to include it into Displayed fields is that organization chart shows the relationship between the employees using arrows, which actually displays the supervisors of all employees. After you've specified the fields, sort the fields in required order using Up and Down buttons. Once fields are sorted, click Next to proceed.



Now, it will ask you to specify the fields that you want to show on organization chart shapes. Select all and add them to *Shape Data fields* box. Here, you can also keep the specific fields (information about the employees) from showing up on the shapes. When fields are added, hit Next.

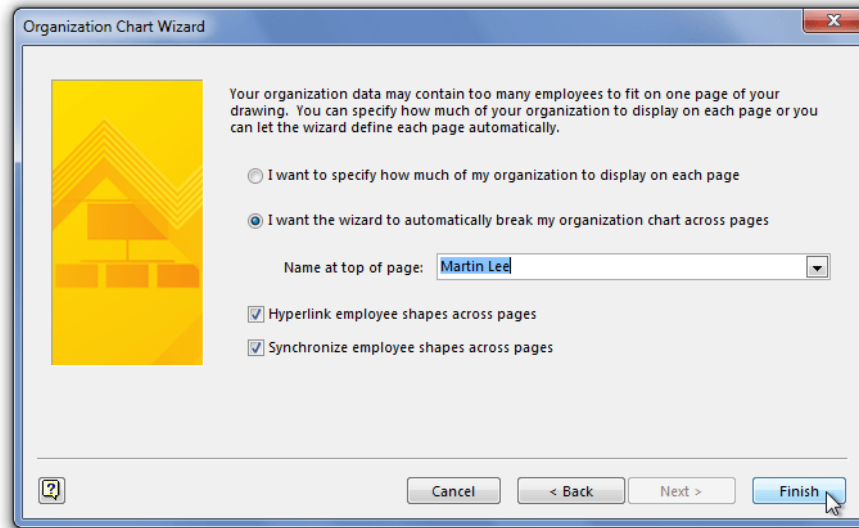


Here, you can choose to attach display picture of employees to their details box. All it needs is the location of the folder where the employees pictures are residing. Before you select the picture folder, check whether the picture names match with the field you specify in order to attach the correct employees' pictures. For instance, if you were to select Names field to match pictures' names with it, make sure that you'd properly named the pictures following the syntax: Namesfield.FileType, such as *MartinLee.jpg*, so it could easily pick the pictures of all employees.

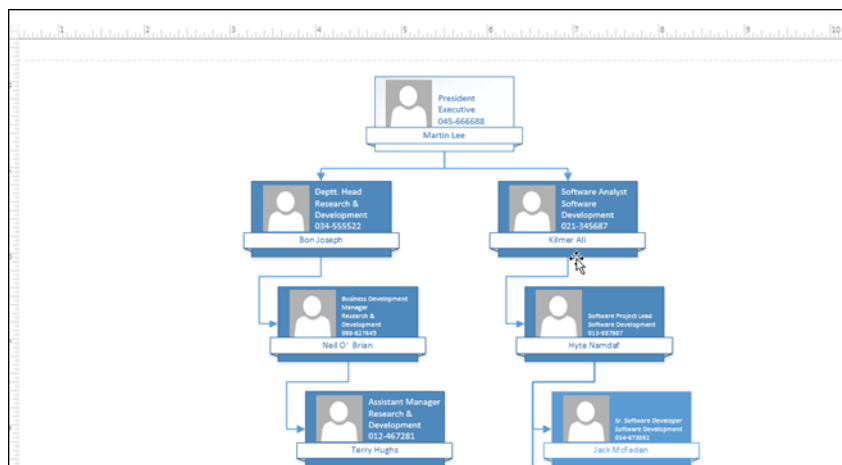


After selecting the pictures folder, click Next to select how you want the wizard to manage the organization chart if it needs to be moved to the next page. Here, you can either select manual management of organization chart that is spread across multiple pages or let wizard automatically break the organization chart and display the specified name on the top of each page. If you select the latter option, it will ask you to specify the

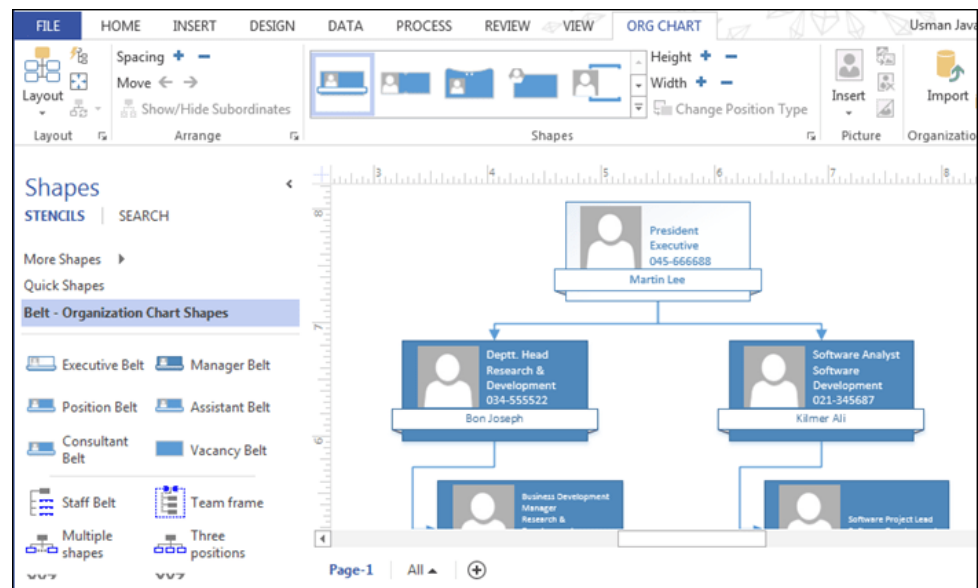
name of the person, which is to be shown on the top. Once you select the required option, enable both checkboxes below it and click Finish to complete the wizard.



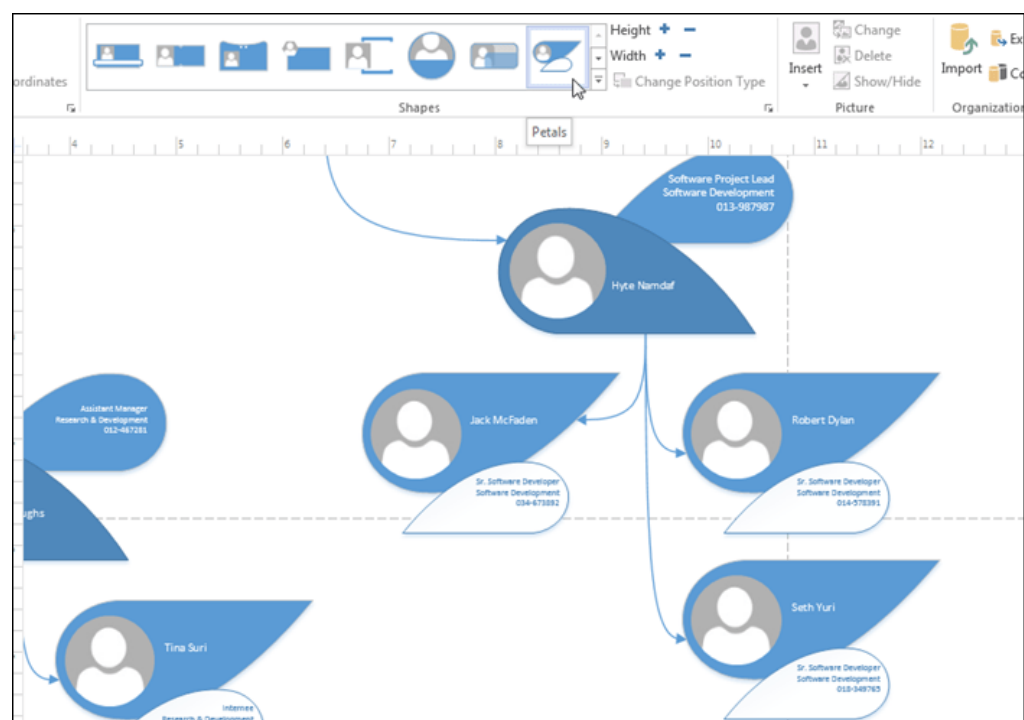
Upon click, it will start processing the details and Excel dataset to create the organization chart. At the top, you can see the top position in the organization with all the specified details including Name, Department, Position, Phone no. etc. Although it arrange the details boxes in the default shape, you can change the shape, design and layout of organization chart. Not only that, it allows you to edit the details of employees, and even change the position/designation of the employee. Great feature to quickly promote and demote the employees to required position!. Another noteworthy feature is to arrange the subordinates in different forms and shapes.



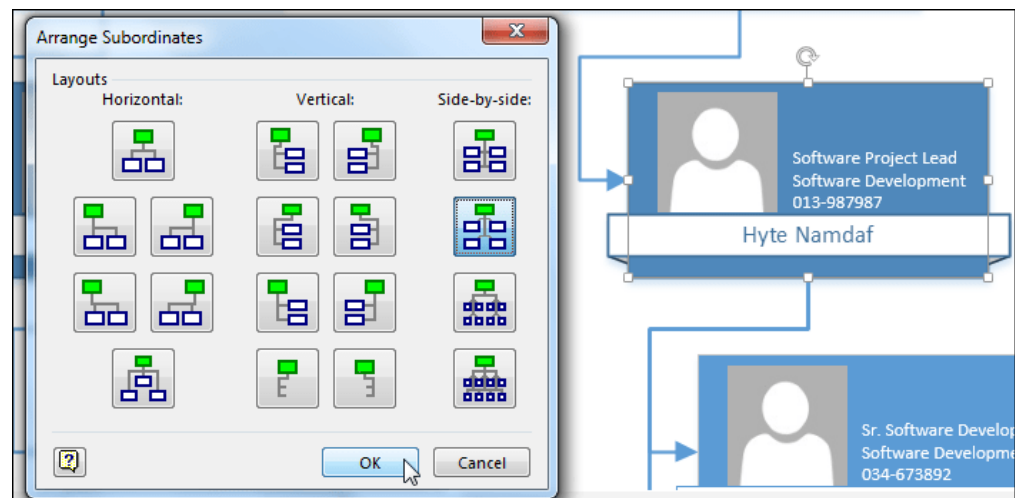
From the special tab titled ORG CHART, you can modify almost everything in the organization chart. For instance, you can change the layout, set spacing, move details boxes, change height and width, insert and change picture and export updated organization chart details to XLSX,TXT and other formats.



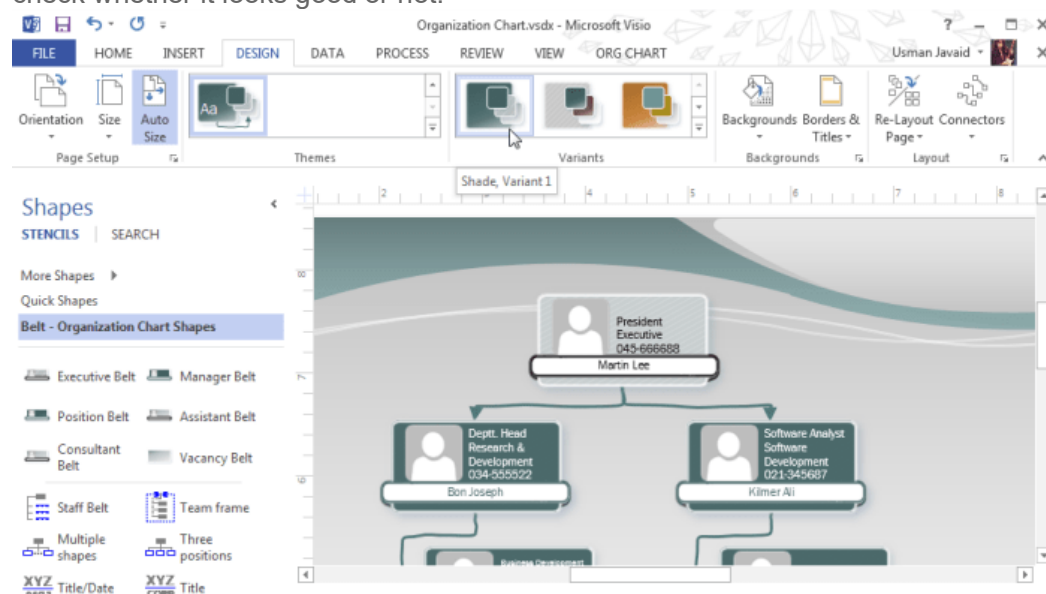
The Shapes section, for instance, includes numerous shapes that you can instantly apply to the organization chart without inputting any other details. After changing the shape, you might need to change height and width of detail boxes to properly arrange them on the page.



Likewise, subordinates can be arranged in the required layout. For this, just right-click the details box of the employees whose subordinates are to be arranged in different layout, and select Arrange Subordinates from Subordinates menu.



Aside from changing the shapes, subordinate layout, details boxes height and width, you can embellish the chart by changing the color theme and design from the *Design* tab. Just head over to the tab, and start picking your favorite theme, color variants, background, and borders & Titles. The best thing about choosing the theme-design variant combo is that it shows you the live preview of the theme as soon as you hover mouse pointer over it, preventing you from applying the theme every time you want to check whether it looks good or not.

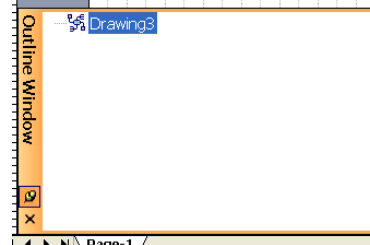


That's it! It is a long ride, but totally worth it! The idea was not to create an organization chart on a simple drawing pad, but rather to employ an application that can effortlessly create, manage and modify organization chart details and export the updated chart to widely-used formats. If you've ever felt that creating and managing organization charts is not a cinch and takes a lot of time to design the layout, the above simple guide may make you think otherwise.

Brainstorming Diagram

Double-click « brainstorming diagram » (Business category).

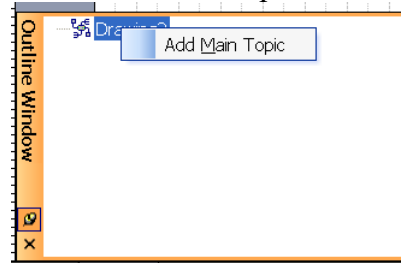
Note the « docker » that appears at the bottom of your screen :



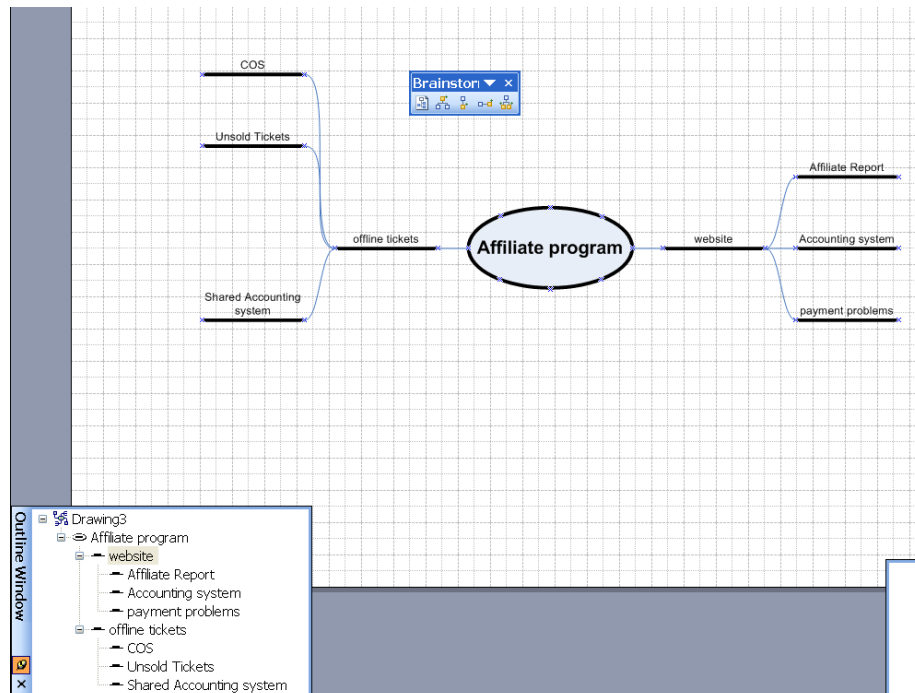
If it's hidden : brainstorming → outline window.

This small panel controls the whole chart :

Right click on « drawing » and « add a main topic » :



Right-click on the subject you've just created in the « outline window » and “add multiple topics” (type each topic on a different line) – repeat the process of “adding topics”:



Note that the brainstorming toolbar has a button that will re-arrange the chart automatically or allow you to add topics directly without going through the « outline window ».

You can also drag and drop an idea from one heading to another in the outline window to change its location or its links with the main ideas.

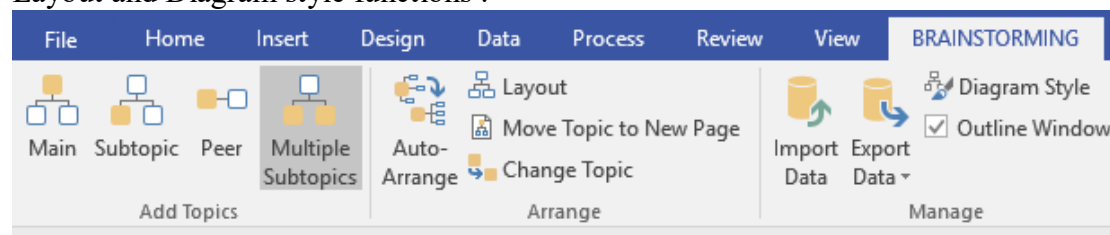
If your ideas completely fill the page and are too complex, you can split the graph to several pages :

Right click an idea in the outline window and “move to a new page”

To test your hyperlinks :

- In Visio, right click on an image and the link will show in the list of options
- If you're viewing the document in Full Screen mode on in a Web version, use the regular left click

Change the look and shape of a brainstorming diagram by changing the options in the Layout and Diagram style functions :



F5 full screen + hyperlinks

Example of a brainstorming diagram:



Cross-Functional Flowchart

In the flowchart category, choose Cross Functional Flowchart.

To label the diagram and swimlanes, click a field that contains placeholder text, and then type the label.

Tip: To reposition a label, click the Text Block tool, click a label, and then drag it to a new location.

In the Ribbon, click the Cross-functional Flowchart tab.

In the Design group, click Rotate Lane Label to change the orientation of the label text.

You can make other changes to the design and layout of the flowchart on this tab.

To indicate phases in your process, in the Insert group, click Separator. To change the label, type while the phase is selected.

Drag a flowchart shape from the Shapes window onto a swimlane.

The swimlane glows with a slight yellow/orange highlight to indicate that it contains the shape. When a shape is contained by a swimlane, it will move with the swimlane if you later decide to rearrange the diagram.

Add more shapes to create your flowchart by using the AutoConnect mini toolbar or by dragging shapes from the Shapes window and connecting them.

Add a swimlane

There are several ways to add swimlanes to your diagram:

Right-click a swimline and then click Insert 'Swimlane' Before or Insert 'Swimlane' After in the shortcut menu.

Hold the pointer over a corner of one of the swimlanes. Click the blue Insert 'Swimlane' Shape arrow that appears.

On the Cross-functional Flowchart tab, in the Insert group, click Swimlane. A swimlane is added after the selected swimlane, or at the end if no swimlane is selected.

From Basic Flowchart Shapes, drag a swimlane shape to the boundary of the band where you want it to appear.

Rearrange the swimlanes

Click the heading of the swimlane you want to move, so the swimlane is selected.

The pointer should display the Move icon.

Drag the swimlane and drop it where you want it.

Shapes that are contained by the swimlane will move with it. To check whether a shape is contained and not just sitting under the swimlane, select the shape. The swimlane will glow with a slight yellow/orange highlight if the shape is contained. If a shape is not contained but you want it to be, move the shape a little and the swimlane will recognize it.

Delete a swimlane

Click the label of the swimlane you want to delete, and then press DELETE.

Note: When you delete a swimlane, you also delete all the shapes it contains.

Create a Timeline

Timelines help you plan and communicate project schedules by showing project phases and deadlines in a format that's easy to read and understand.

To find the right template to start from, go to **File > New** and, in the search box, type **Timeline**.

You can also go to **Categories >**

Add a base timeline shape

- From the **Timeline Shapes** stencil, drag one of the timeline shapes (Block, Line, or Cylindrical) onto the drawing page.

The **Configure Timeline** dialog box opens. Set the **Start** and **Finish** dates and times. These dates are added to the beginning and end of the timeline. Finish setting the options on the **Time Period** and **Time Format** tabs, and click **OK**.

To change any of these settings later, you can open the **Configure Timeline** dialog box again by right-clicking the timeline, and then clicking **Configure Timeline**.

Add milestones, intervals, and markers

Marker type	Use to
Milestone	Indicate a specific milestone date on the timeline (for example, the date when a writing project must be handed off to a publisher).
Interval	Indicate a critical time span on the timeline (for example, the time required to write a first draft).
Today marker	Reflect the amount of time that has passed since the project began. A Today marker shifts automatically as the real-world date changes to show the current status of your schedule in relation to your next deadline.

Indicate a milestone on a timeline

1. Drag a milestone shape from the **Timeline Shapes** stencil and drop it directly on top of the timeline.
2. In the **Configure Milestone** dialog box, type or select the date and time for the milestone.
3. In the **Description** box, type the label you want to show for the milestone.
4. In the **Date format** list, choose how you want the date to look.
5. Click **OK**.

To quickly change a milestone's date, drag the milestone where you want it on the timeline. The date on the milestone changes to match the new position.

Indicate a time span on a timeline

1. Drop an interval shape directly on top of the timeline.
2. Set the start and end dates for the time span, type a label, and choose the date format.
3. Click **OK**.

To quickly change the time span of an interval, drag the selection handles or move the interval where you want it on the timeline. The date on the interval changes to match the new position.

Move the text off a timeline

Timelines can sometimes get crowded. To make your timeline more readable, click the yellow control handle and drag it to where you want to put the text.

Indicate elapsed time on a timeline

- Drop the **Elapsed time** shape directly on top of the timeline. The shape aligns its left end with the beginning of the timeline and extends to the current date.
- Drag the **Today marker** shape onto the timeline. The shape is positioned at the current real-world date.

Each time you open a timeline drawing with an **Elapsed time** or **Today marker** shape on it, the shapes shift to align with the current real-world date.

Show details for a section of a timeline

Expand a segment of an existing timeline as a second timeline to show more detail. The expanded timeline represents a segment of the original timeline, but you work with it individually.

If you add a milestone or interval to the original timeline, it will also be added to the expanded timeline. But if you add one to the expanded timeline, it will not be added to the original timeline.

Show details for a section

1. Drag the **Expanded timeline** shape onto the page.
2. In the **Configure Timeline** dialog box, set the options and click **OK**.

The expanded timeline uses dashed lines to indicate the section of the original timeline that it represents.

Shared milestones and intervals are synchronized automatically so that if you change them on one timeline, they also change on the other.

The expanded timeline uses the same shape type as the original timeline by default. To change the shape type, right-click the expanded timeline, point to **Timeline Type**, and choose an option.

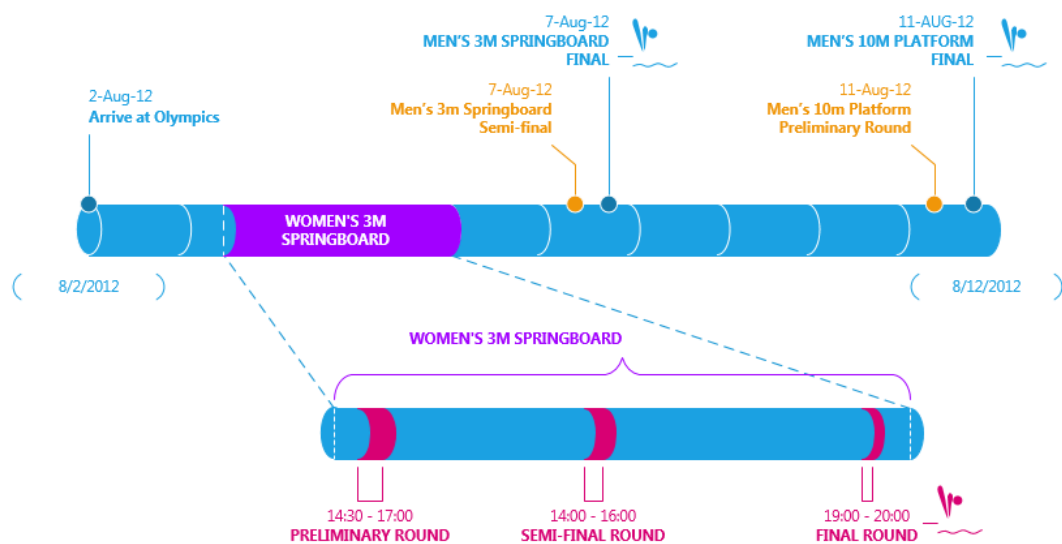
To quickly change the time span of an expanded timeline, drag the yellow control handles. The date on the expanded timeline changes to match the new position.

Refine a timeline

What you want to change	Action to take
Project start or finish dates	Right-click the timeline, click Configure Timeline , and select the new start or finish dates.
Number of divisions on a timeline bar	Right-click the timeline, click Configure Timeline , and choose a different Time scale unit.
Show or hide timeline dates and divisions	Right-click the timeline, click Configure Timeline and go to the Time Format tab. Select or clear check boxes to show or hide dates and markings on the timeline.
Show or hide arrowheads on a timeline bar	Right-click the timeline, point to Arrowhead , and select an option.
Milestone type	Right-click the milestone, point to Set Milestone Type , and select a style.
Milestone date	Right-click the milestone, click Configure Milestone , and enter a date.
Milestone position	Right-click the milestone, point to Position , and select a style.
Show or hide milestone date and description	Right-click the milestone, point to Show Elements , and select or clear the options.
Milestone or time span description	Double-click the text associated with the milestone or interval, type the new description, and press Esc.
Interval type	Right-click the interval, point to Set Interval Type , and select a style.
Set interval description above or below the date	Right-click the interval, point to Description Position , and select an option.
Show or hide interval date, description, and percent complete	Right-click the interval, point to Show Elements , and select or clear the options.

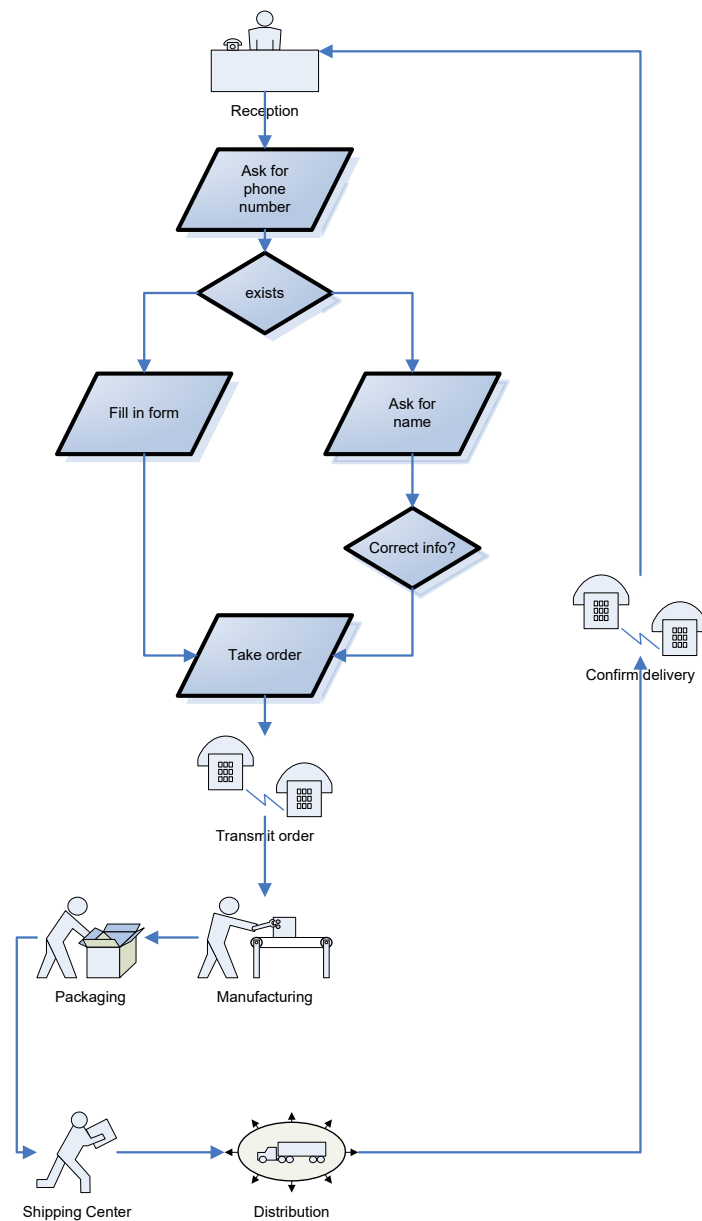
What you want to change	Action to take
Time span dates	Right-click the interval, click Configure Interval , and enter the dates.
Position of text associated with a milestone, interval, or today marker	Select the shape. Drag a control handle to change the distance and angle between the text and timeline bar.
Interim markings	Right-click the timeline, point to Interim Markings , and select a style.

Example:



Exercise

Use the « basic flowchart » and the Business Work Flow stencil by using the “more shapes” option in the shapes panel on the right



To change the orientation of a shape (mirror effect) :
 Right click → shape → flip horizontal / vertical