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# Visio® 2010

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*Scott A. Helmers*



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- Collaborate on diagrams with Microsoft SharePoint® 2010
- Customize diagrams with your own shapes and templates

**1** Follow the easy numbered steps

**2** Use screenshots to check your work

**3** Get helpful tips and pointers

**4** Build your skills hands-on using ready-made practice files

40 Chapter 2 Creating a Task List

8. Click **OK** to close the **Task Information** dialog box.



Tasks 3 and 4 are linked with a finish-to-start relationship.

**Tip** Recall that any task can have multiple predecessor tasks. One way you can specify additional predecessor tasks is to add them on the Predecessors tab of the Task Information dialog box. For finish-to-start relationships (the default link type), the predecessor with the later finish date will determine the start date of the successor task. Next you'll link all the subtasks under Public Launch Phase in one action.

9. Select the names of tasks 6 through 8.



There are several ways of linking tasks, and you'll use one more to link the two phases of the new book launch plan.

10. On the **Task** tab, in the **Schedule** group, click **Link Tasks**.

Tasks 6 through 8 are linked.

**Tip** To select tasks that are not adjacent, select the first task, hold down the **Ctrl** key, and then select the second task.

**Practice Files** Before you can complete the exercises in this chapter, you need to install the practice files specified in "Using the Practice Files" at the beginning of this book to their default location.

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# **Microsoft® Visio® 2010**

Step by Step

**Scott A. Helmers**

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# Contents

Introducing Visio 2010 .....	ix
Modifying the Display of the Ribbon .....	xiii
Features and Conventions of This Book .....	xix
Using the Practice Files .....	xxi
Getting Support and Giving Feedback .....	xxiii
Your Companion eBook .....	xxv
Acknowledgments .....	xxvii
<b>1 A Visual Orientation to a Visual Product</b> .....	<b>1</b>
Getting Started with Visio 2010 .....	2
Visio Standard .....	2
Visio Professional .....	4
Visio Premium .....	4
Exploring the Backstage View .....	6
Using the Visio Ribbon .....	9
Resizing the Ribbon .....	13
Minimizing the Ribbon .....	14
Understanding Contextual Tabs .....	15
Understanding Add-in Tabs .....	16
Understanding Shapes, Masters, Stencils, and Templates .....	16
Exploring the Drawing Window .....	17
Managing the Shapes Window .....	20
Panning and Zooming in Visio .....	24
Resizing and Repositioning Shapes .....	29
Key Points .....	35

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<b>2</b>	<b>Creating a New Diagram</b>	<b>37</b>
	Using Basic Shapes and the Dynamic Grid	38
	Selecting Shapes	41
	Copying and Pasting Shapes	42
	Connecting Shapes with Lines	43
	Connecting Shapes with Dynamic Connectors	47
	Identifying 1-D Shapes and Types of Glue	51
	Positioning Shapes with Rulers and Guides	52
	Using AutoConnect and Quick Shapes	55
	Using AutoAdd and AutoDelete	59
	Starting a New Diagram from a Sample Diagram	62
	Key Points	67
<b>3</b>	<b>Adding Sophistication to Your Drawings</b>	<b>69</b>
	Adding Text to Shapes	70
	Creating and Formatting Text Boxes	71
	Orienting Shapes on the Page	73
	Orienting Shape Text	76
	Positioning Shape Text	78
	Adding ScreenTips and Comments	81
	Using Shape Data	84
	Inserting Fields: The Basics	86
	Grouping Shapes	88
	Inserting Pictures	92
	Understanding Layers	94
	Managing Pages and Page Setup	98
	Working with Background Pages and Borders	104
	Key Points	109

<b>4</b>	<b>Drawing the Real World: Flowcharts and Organization Charts</b>	<b>111</b>
	Selecting a Flowchart Type	112
	Visio Standard	112
	Visio Professional	112
	Visio Premium	113
	Creating Flowcharts	114
	Adding Labels to Flowcharts	118
	Understanding Swimlane Diagrams	119
	Creating Swimlane Diagrams	120
	Understanding Organization Charts	125
	Building an Organization Chart by Hand	126
	Using the Organization Chart Wizard with Existing Data	130
	Using the Organization Chart Wizard with New Data	138
	Enhancing Org Charts with Pictures	141
	Key Points	141
<b>5</b>	<b>Adding Style, Color, and Themes</b>	<b>143</b>
	Aligning and Spacing Shapes	144
	Using the Auto Align & Space Feature	148
	Applying Color and Fill Patterns	150
	Applying Line Styles and Colors	154
	Using the Format Painter	157
	Turning Off the Grid	158
	Applying Themes to Your Diagrams: Part 1	161
	Applying Themes to Your Diagrams: Part 2	163
	Customizing Themes	166
	Setting Theme Options	168
	Key Points	169

<b>6</b>	<b>Entering, Linking to, and Reporting on Data</b>	<b>171</b>
	Understanding Shape Data .....	172
	Viewing Shape Data .....	172
	Editing Shape Data .....	175
	Viewing Shape Data Attributes .....	177
	Changing Shape Data Attributes .....	179
	Creating New Shape Data Fields .....	184
	Linking Diagrams to External Data .....	186
	Refreshing All Data in Linked Diagrams .....	193
	Refreshing Selected Data in Linked Diagrams .....	195
	Scheduling Data Refresh .....	196
	Linking Data to Shapes Automatically .....	197
	Running a Predefined Report .....	200
	Creating a New Report .....	205
	Modifying an Existing Report .....	210
	Key Points .....	212
<b>7</b>	<b>Adding and Using Hyperlinks</b>	<b>215</b>
	Enhancing Diagrams by Adding Hyperlinks .....	216
	Using Hyperlinks .....	217
	Linking to a Website .....	218
	Linking to a Document .....	219
	Linking to a Specific Location in a Document .....	221
	Linking to Another Visio Page .....	224
	Understanding Relative and Absolute Hyperlinks .....	226
	Setting the Hyperlink Base .....	231
	Editing Existing Hyperlinks .....	233
	Adding Multiple Hyperlinks .....	234
	Key Points .....	236
<b>8</b>	<b>Sharing and Publishing Diagrams: Part 1</b>	<b>239</b>
	Previewing and Printing Visio Diagrams .....	240
	Removing Personal Information .....	245
	Creating Graphics .....	247
	Saving in Other File Formats .....	252
	Creating Visio Templates .....	255

Sharing Diagrams by Using the Visio Viewer .....	260
Publishing Visio Diagrams to the Web .....	261
Key Points .....	268
<b>9 Drawing the Real World: Network and Data Center Diagrams</b>	<b>271</b>
Building Basic Network Diagrams .....	272
Building Detailed Network Diagrams .....	275
Organizing Network Shapes in a Diagram .....	278
Creating Rack Diagrams .....	280
Adding Equipment to Rack Diagrams .....	283
Changing the Drawing Scale .....	289
Running Computer and Network Reports .....	292
Searching and Replacing Text .....	294
Mapping Active Directory and LDAP .....	296
Key Points .....	297
<b>10 Visualizing Your Data</b>	<b>299</b>
Enhancing Diagrams with Data-Driven Graphics .....	300
Network Equipment Diagram .....	300
Process Improvement Workflow .....	302
Casino Operation .....	303
Risk Management .....	303
Using Existing Data Graphics .....	304
Editing Data Graphics .....	307
Creating New Data Graphics .....	313
Creating Data Graphic Legends .....	317
Key Points .....	319
<b>11 Adding Structure to Your Diagrams</b>	<b>321</b>
Comparing Containers and Groups .....	322
Working with Containers and Their Contents .....	328
Formatting Containers .....	331
Sizing Containers .....	331
Adding Shapes to Lists .....	333
Formatting and Sizing Lists .....	337

Finding Containers and Lists in Visio . . . . .	338
Swimlanes . . . . .	338
Wireframes . . . . .	342
Legends . . . . .	347
Annotating Shapes with Callouts . . . . .	348
Key Points . . . . .	352
<b>12 Creating and Validating Process Diagrams . . . . .</b>	<b>355</b>
Understanding Visio Rules . . . . .	356
Validating Flowcharts . . . . .	357
Understanding BPMN . . . . .	361
Creating and Validating BPMN Diagrams . . . . .	362
Creating Subprocesses . . . . .	366
Creating and Exporting SharePoint Workflow Diagrams . . . . .	370
Reusing Existing Validation Rules . . . . .	373
Creating New Validation Rules . . . . .	375
Key Points . . . . .	377
<b>13 Sharing and Publishing Diagrams: Part 2 . . . . .</b>	<b>379</b>
Customizing Diagrams Saved as Websites . . . . .	380
Saving Visio-Created Websites on a SharePoint Server . . . . .	387
Understanding Visio Services . . . . .	389
Publishing Visio Drawings to SharePoint 2010 Visio Services . . . . .	390
Key Points . . . . .	398
<b>Appendix: Looking Under the Hood . . . . .</b>	<b>399</b>
<b>Glossary . . . . .</b>	<b>411</b>
<b>Index . . . . .</b>	<b>419</b>
<b>About the Author . . . . .</b>	<b>439</b>

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# Introducing Visio 2010

Microsoft Visio 2010 is a bold new release. If you're new to Visio, your timing is excellent! This version of Visio is easier to use than ever before and yet the diagrams you create can have more impact and style, and can present more real-world data than in any previous version.

If you've used prior versions of Visio, you're in luck too. You'll find the features you love, but you'll see them presented with the new Visio ribbon. In addition, you'll discover that you can publish dynamically updateable diagrams to Microsoft SharePoint, where anyone can view them, even if they don't have Visio. You'll find new templates and stencils, faster methods for creating drawings, simple ways to add structure to your diagrams, improved integration with AutoCad drawings, diagram validation rules, and a wealth of other new features.

In short, whether you're a first timer or have been using Visio for years, this is the strongest and most exciting version of Visio yet.

## Creating and Enhancing Diagrams More Easily

Quick Shapes, AutoConnect, AutoAdd, AutoDelete, AutoAlign, AutoSize... just the names of some of the new and enhanced features in Visio 2010 suggest that creating diagrams will be simpler. A few examples include the following:

- Want to add a new shape to the page? For commonly used shapes, there's no need to move the pointer to the stencil and drag a shape onto the page. Just point to a shape that's already on the page and the QuickShapes menu offers you four shapes. One click and you've not only added a new shape but it's already connected to the existing shape.
- Need to insert a shape between two existing shapes? Simply drop the new shape onto the connector between two existing shapes. Not only will AutoAdd insert the new shape but it will add a new connector. And if there isn't enough room for the new shape, Visio will even rearrange part of the diagram to make room.
- Want to delete a shape that's connected between two others? Just select the shape and press the Delete key. Self-healing connectors do the rest; the shapes on either side of the deleted shape will be connected to each other.

- Need to enlarge the drawing page and print the new diagram across multiple sheets of paper? Simply drag a shape into the space surrounding the drawing page and AutoSize will add a new page. That's it! No other adjustments or setting changes required.
- Don't like the way your shapes are aligned on the page? Click the Auto Align & Space button and Visio rearranges your diagram. Not quite happy with the result? Undo the changes, move a few shapes around, and then click Auto Align & Space again.
- Need to present your diagram to an audience but think the drawing is a bit boring? Open the Visio 2010 Themes gallery: one click applies a suite of coordinated colors, styles, fonts, line patterns, and effects to every shape. You can also apply predesigned page backgrounds or page borders by selecting one from a new gallery.

Visio 2010 also brings Live Preview to your diagrams. Many of the features listed above, along with most font, color, size, and style changes, take advantage of Live Preview to show you a potential change before you make it. Live Preview even extends to Visio *Data Graphics*, letting you preview the dynamic presentation of the data behind your shapes.

## Adding Structure to Visio Diagrams

Many types of Visio diagrams contain sets of shapes that are related to each other. In previous Visio versions, you could visually suggest the relationships by creating some combination of groups, colored background shapes, or borders.

Visio 2010 introduces a new type of shape called a *container* that provides more than just a visual grouping for a set of shapes. The container structure means that shapes in a container know they are contained, and the container knows the members that reside within it. Consequently, when you move, copy, or delete a container, all of the members go with it. However, unlike a group shape, the member shapes are accessible with a single click just as if the container were not there.

In most containers, you can place member shapes wherever you'd like. However, a *list* is a special type of container that maintains members in ordered sequence. Each list member knows exactly where it resides within the list.

Visio 2010 includes a third type of structured diagram component known as a *callout*. You still use new-style callouts to add annotations to other shapes, but both the callout and the target shape are aware of each other. Once again, this improves many user interface actions, but also allows Visio *add-ins* to work more intelligently with annotated shapes.

Containers, lists, and callouts are great for Visio users, but they also offer intriguing options to Visio developers for building location-aware shapes and for writing code that takes advantage of diagram structure.

## Publishing to SharePoint

In Visio 2010, as in previous versions of Visio, you can save any Visio drawing as a set of webpages. This was, and is, a tremendously useful capability because it allows anyone with Windows Internet Explorer to view your web-published Visio diagram without needing Visio.

Although this publishing option has many advantages, it also has one fundamental drawback: the published drawings are static. If the diagram changes or the underlying data changes, you need to republish the drawing before users can see the changes.

The combination of Visio 2010 and SharePoint Server 2010 Visio Services introduces a new option that you can use to publish dynamically updateable Visio web drawings. You can publish drawings that contain live connections to external data sources and feature data graphics to visualize the data behind the diagram. When the underlying data changes, or certain aspects of the diagram change, Visio Services on SharePoint ensures that the web drawing is automatically updated.

You needn't stop with simply publishing a web drawing, either. You can create Web Parts to contain your Visio drawings and can even create interactions among Web Parts so that published Visio drawings interact with each other and with non-Visio Web Parts.

## Managing Business Processes

The Premium edition of Visio 2010 adds several new templates that are specifically focused on business process and also adds a number of process-related features.

Using the Business Process Management Notation (BPMN) template, you can create process maps that conform to the BPMN 1.2 standard.

With the SharePoint Workflow template, you can create a visual layout of a SharePoint workflow, export it to SharePoint Designer for refinement and completion, and then execute the workflow in SharePoint. You can also bring a SharePoint Designer workflow back into Visio in order to see a graphical representation.

The Process tab in Visio Premium 2010 includes several new buttons for automatically creating and managing subprocesses within a process diagram.

## Validating Diagrams

Visio 2010 validation rules, which are part of Visio Premium 2010, introduce a new level of quality to your Visio diagrams. You've always been able to create great looking diagrams with Visio, but now you can ensure that your diagrams meet a minimum set of predefined conditions before you publish or distribute them.

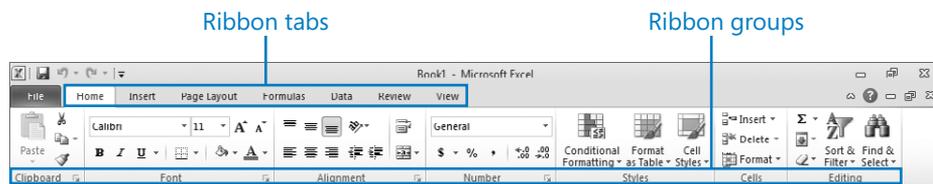
Four Visio 2010 templates—Basic Flowchart, Cross Functional Flowchart, Microsoft SharePoint Workflow, and Business Process Modeling Notation—include predefined validation rule sets that you can run in diagrams created from those templates. You can also import existing rule sets into other diagrams. For example, you can add the flowchart rules to a Visio 2003 flowchart to improve its quality. You can also create your own rules and rule sets to validate diagrams.

## Summary

There's a lot to like about Visio 2010! This introduction has barely scratched the surface of some of the new features in the software. The exercises in this book will get you started with Visio 2010 and will give you hands-on experience with the best that Visio has to offer.

# Modifying the Display of the Ribbon

The goal of the Microsoft Office working environment is to make working with Office documents, including Microsoft Word documents, Excel workbooks, PowerPoint presentations, Outlook e-mail messages, Access database tables, and Visio diagrams as intuitive as possible. You work with an Office document and its contents by giving commands to the program in which the document is open. All Office 2010 programs organize commands on a horizontal bar called the *ribbon*, which appears across the top of each program window whether or not there is an active document.



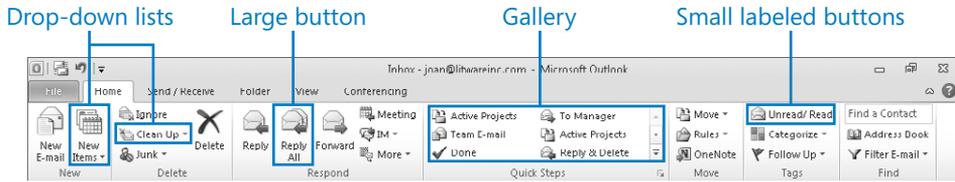
Commands are organized on task-specific tabs of the ribbon, and in feature-specific groups on each tab. Commands generally take the form of buttons and lists. Some appear in galleries. Some groups have related dialog boxes or task panes that contain additional commands.

Throughout this book, we discuss the commands and ribbon elements associated with the program feature being discussed. In this topic, we discuss the general appearance of the ribbon, things that affect its appearance, and ways of locating commands that aren't visible on compact views of the ribbon.

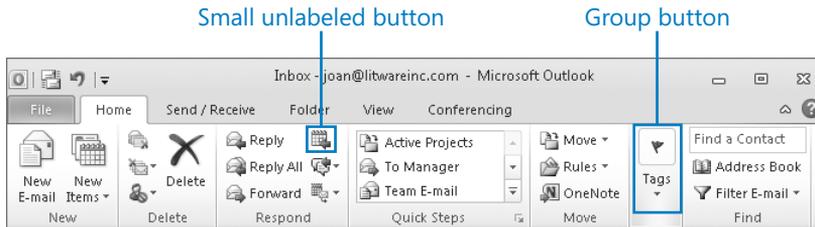
## Dynamic Ribbon Elements

The ribbon is dynamic, meaning that the appearance of commands on the ribbon changes as the width of the ribbon changes. A command might be displayed on the ribbon in the form of a large button, a small button, a small labeled button, or a list entry. As the width of the ribbon increases or decreases, the size, shape, and presence of buttons on the ribbon adapt to the available space.

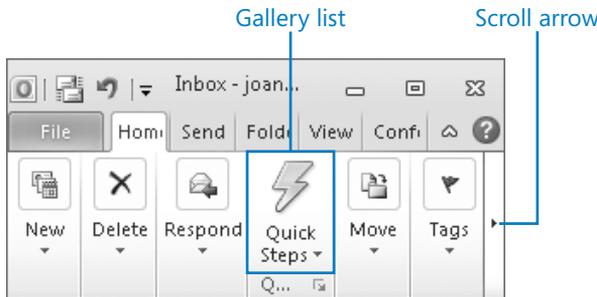
For example, when sufficient horizontal space is available, the buttons on the Review tab of the Word program window are spread out and you're able to see more of the commands available in each group.



If you decrease the width of the ribbon, small button labels disappear and entire groups of buttons hide under one button that represents the group. Click the group button to display a list of the commands available in that group.



When the window becomes too narrow to display all the groups, a scroll arrow appears at its right end. Click the scroll arrow to display hidden groups.



## Changing the Width of the Ribbon

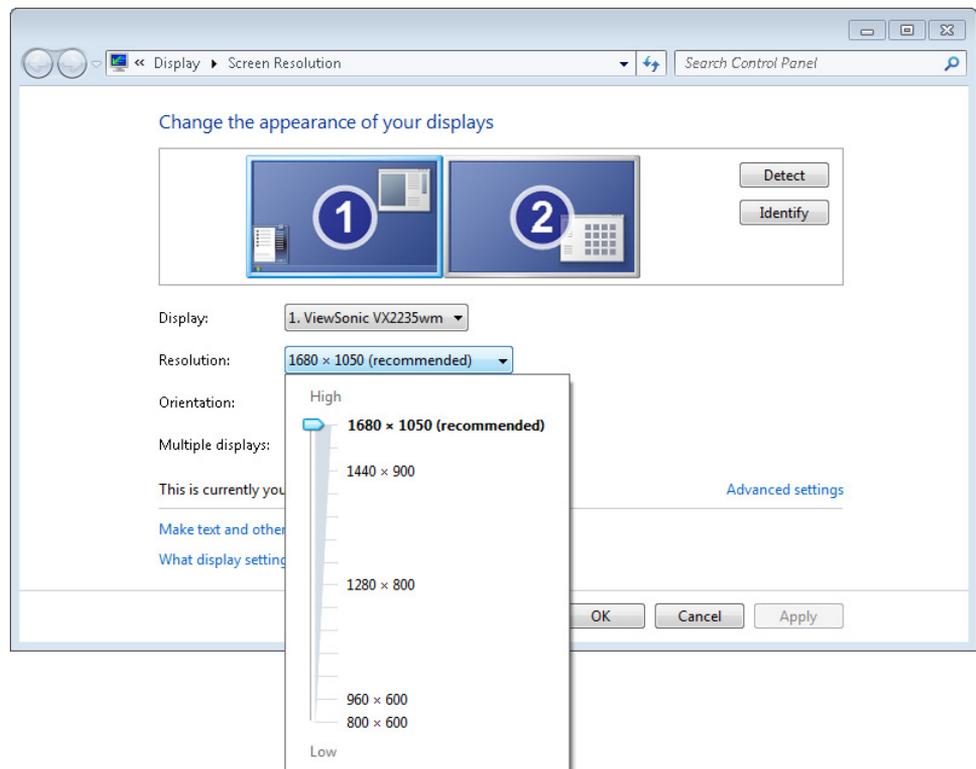
The width of the ribbon is dependent on the horizontal space available to it, which depends on these three factors:

- **The width of the program window** Maximizing the program window provides the most space for ribbon elements. You can resize the program window by clicking the button in its upper-right corner or by dragging the border of a nonmaximized window.

**Tip** On a computer running Windows 7, you can maximize the program window by dragging its title bar to the top of the screen.

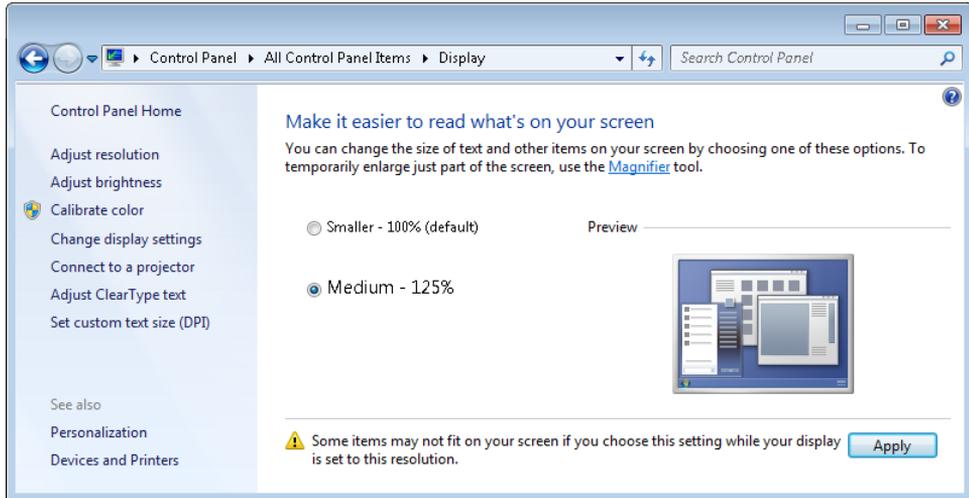
- **Your screen resolution** Screen resolution is the size of your screen display expressed as pixels wide × pixels high. The greater the screen resolution, the greater the amount of information that will fit on one screen. Your screen resolution options are dependent on your monitor. At the time of writing, possible screen resolutions range from 800 × 600 to 2048 × 1152. In the case of the ribbon, the greater the number of pixels wide (the first number), the greater the number of buttons that can be shown on the ribbon, and the larger those buttons can be.

On a computer running Windows 7, you can change your screen resolution from the Screen Resolution window of Control Panel. You set the resolution by dragging the pointer on the slider.

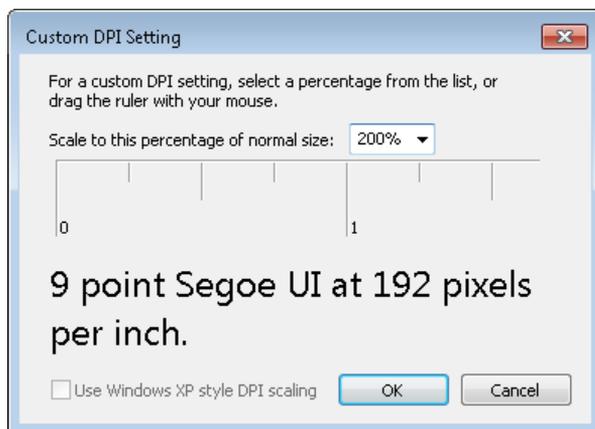


- **The density of your screen display** You might not be aware that you can change the magnification of everything that appears on your screen by changing the screen magnification setting in Windows. Setting your screen magnification to 125% makes text and user interface elements larger on screen. This increases the legibility of information, but means that less fits onto each screen.

On a computer running Windows 7, you can change the screen magnification from the Display window of Control Panel. You can choose one of the standard display magnification options, or create another by setting a custom text size.



The screen magnification is directly related to the density of the text elements on screen, which is expressed in dots per inch (dpi) or pixels per inch (ppi). (The terms are interchangeable, and in fact are both used in the Windows dialog box in which you change the setting.) The greater the dpi, the larger the text and user interface elements appear on screen. By default, Windows displays text and screen elements at 96 dpi. Choosing the Medium - 125% display setting changes the dpi of text and screen elements to 120 dpi. You can choose a custom setting of up to 500% magnification, or 480 dpi, in the Custom DPI Setting dialog box. The list allows you to choose a magnification of up to 200%. You can choose a greater magnification by dragging across the ruler from left to right.



**See Also** For more information about display settings, refer to *Windows 7 Step by Step* (Microsoft Press, 2009), *Windows Vista Step by Step* (Microsoft Press, 2006), or *Windows XP Step by Step* (Microsoft Press, 2002) by Joan Lambert Preppernau and Joyce Cox.

## Adapting Exercise Steps

The screen images shown in the exercises in this book were captured at a screen resolution of 1024 × 768, at 100% magnification, and the default text size (96 dpi). If any of your settings are different, the ribbon on your screen might not look the same as the one shown in the book. For example, you might see more or fewer buttons in each of the groups, the buttons you see might be represented by larger or smaller icons than those shown, or the group might be represented by a button that you click to display the group's commands.

When we instruct you to give a command from the ribbon in an exercise, we do it in this format:

- On the **Insert** tab, in the **Illustrations** group, click the **Chart** button.

If the command is in a list, we give the instruction in this format:

- On the **Page Layout** tab, in the **Page Setup** group, click the **Breaks** button and then, in the list, click **Page**.

The first time we instruct you to click a specific button in each exercise, we display an image of the button in the page margin to the left of the exercise step.

If differences between your display settings and ours cause a button on your screen to look different from the one shown in the book, you can easily adapt the steps to locate the command. First, click the specified tab. Then locate the specified group. If a group has been collapsed into a group list or group button, click the list or button to display the group's commands. Finally, look for a button that features the same icon in a larger or smaller size than that shown in the book. If necessary, point to buttons in the group to display their names in ScreenTips.

If you prefer not to have to adapt the steps, set up your screen to match ours while you read and work through the exercises in the book.

# Features and Conventions of This Book

This book has been designed to lead you step by step through all the tasks you're most likely to want to perform in Microsoft Visio 2010. If you start at the beginning and work your way through all the exercises, you will gain enough proficiency to be able to create and work with many types of Visio diagrams. However, each topic is self-contained. If you have worked with a previous version of Visio, or if you completed all the exercises and later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

- **Detailed table of contents** Search the listing of the topics within each chapter.
- **Chapter thumb tabs** Easily locate the beginning of the chapter you want.
- **Topic-specific running heads** Within a chapter, quickly locate the topic you want by looking at the running heads at the top of odd-numbered pages.
- **Glossary** Look up the meaning of a word or the definition of a concept.
- **Detailed index** Look up specific tasks and features in the index, which has been carefully crafted with the reader in mind.

You can save time when reading this book by understanding how the *Step by Step* series shows exercise instructions, keys to press, buttons to click, and other information.

<b>Convention</b>	<b>Meaning</b>
<b>SET UP</b>	This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise. It also indicates any requirements you should attend to or actions you should take before beginning the exercise.
<b>CLEAN UP</b>	This paragraph following a step-by-step exercise provides instructions for saving and closing open files or programs before moving on to another topic. It also suggests ways to reverse any changes you made to your computer while working through the exercise.
<b>1</b>	Numbered steps guide you through hands-on exercises in each topic, as well as procedures in sidebars and expository text.
<b>2</b>	

<b>Convention</b>	<b>Meaning</b>
See Also	This paragraph directs you to more information about a topic in this book or elsewhere.
Troubleshooting	This paragraph alerts you to a common problem and provides guidance for fixing it.
Tip	This paragraph provides a helpful hint or shortcut that makes working through a task easier.
Important	This paragraph points out information that you need to know to complete a procedure.
Keyboard Shortcut	This paragraph provides information about an available keyboard shortcut for the preceding task.
Ctrl+B	A plus sign (+) between two keys means that you must press those keys at the same time. For example, “Press Ctrl+B” means that you should hold down the Ctrl key while you press the B key.
	Pictures of buttons appear in the margin the first time the button is used in a chapter.
<b>Bold</b>	In exercises that begin with SET UP information, bold type displays text that you should type; the names of program elements, such as buttons, commands, windows, and dialog boxes; and files, folders, or text that you interact with in the steps.

# Using the Practice Files

Before you can complete the exercises in this book, you need to copy the book's practice files to your computer. These practice files, and other information, can be downloaded from here:

[oreilly.com/catalog/9780735648876/](http://oreilly.com/catalog/9780735648876/)

Display the detail page in your web browser and follow the instructions for downloading the files.

**Important** The Microsoft Visio2010 program is not available from this website. You should purchase and install that program before using this book.

The following table lists the practice files for this book.

Chapter	File
Chapter 1: A Visual Orientation to a Visual Product	Size & Position_start.vsd
Chapter 2: Creating a New Diagram	Autoconnect and Quick Shapes_start.vsd Basic shapes_start.vsd
Chapter 3: Adding Sophistication to Your Drawings	Background Exercises_start.vsd Corporate Diagram International_start.vsd Corporate Diagram_start.vsd International Office.jpg Starfish.jpg Text Exercises_start.vsd
Chapter 4: Drawing the Real World: Flowcharts and Organization Charts	HR Recruiting Flowchart_start.vsd Org Chart Data_start.xlsx
Chapter 5: Adding Style, Color, and Themes	HR Recruiting Flowchart with labels_start.vsd Org Chart by Hand with data_start.vsd Org Chart via Wizard with data_start.vsd
Chapter 6: Entering, Linking to, and Reporting on Data	HR Process Data_start.xlsx HR Process Map with data_start.vsd HR Process Map_start.vsd
Chapter 7: Adding and Using Hyperlinks	HR Process Map_start.vsd Human Resources Policy Manual.docx Sample PDF Document.pdf Sample presentation.pptx Sample Project file.mpp Sample spreadsheet.xlsx

Chapter	File
Chapter 8: Sharing and Publishing Diagrams: Part 1	HR Process Map for Chapter08_start.vsd
Chapter 9: Drawing the Real World: Network and Data Center Diagrams	Network Diagram (Basic) with data_start.vsd Network Diagram (Basic)_start.vsd Network Diagram (Detailed)_start.vsd Network Diagram (Organized)_start.vsd Network Diagram with Rack_start.vsd Network Equipment Data (Basic)_start.xlsx
Chapter 10: Visualizing Your Data	Casino Floor.vsd HR Process Map with data_start.vsd Sales Proposal Process TaskMap.pdf
Chapter 11: Adding Structure to Your Diagrams	Containers, Lists and Callouts_start.vsd
Chapter 12: Creating and Validating Process Diagrams	HR Recruiting Flowchart Validation_start.vsd RuleSets -- BPMN.html RuleSets -- CFF.html RuleSets -- Flowchart.html RuleSets -- SharePoint Workflow.html Theatre Ticketing Process_start.vsd Theatre Ticketing with Subprocess_start.vsd Visio 2007 Flowchart_start.vsd
Chapter 13: Sharing and Publishing Diagrams: Part 2	HR Process Map Save as Web2_start.vsd Theater Ticketing Diagram_start.vsd
Appendix: Looking Under the Hood	ShapeSheet_start.vsd

## Companion Content

Bonus content for this book, including a list of all templates included with Visio 2010 and a selection of Visual Basic for Applications programs, can be found here:

<http://aka.ms/648876/files>

Please follow the directions for downloading.

# Getting Support and Giving Feedback

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# Acknowledgments

First and foremost, my deepest thanks and love to Marilyn, Sara, and Julie for doing everything that I didn't do while I was in book-writing mode. It's over and I'm back!

A special thanks to my daughter Sara, who read every word of every chapter before it left the house for the first time. The end result is better for her effort.

Thanks to the Visio team at Microsoft for creating such an incredible product and for being such a welcoming and supportive group. I've had the pleasure of getting to know many team members over the last three years and look forward to continuing to work with them. Particular thanks to Stephanie Horn for getting answers to a long list of questions as I was writing the book.

The dozen or so Visio experts in the world who are part of the Microsoft Most Valuable Professional (MVP) program are an amazingly talented group, and it is a pleasure to count many of them as friends. In particular, thanks to: John Marshall for his astute and historically rich technical editing of this book; Chris Roth for maintaining the ever-useful collection of articles, ideas, and forums at the Visio Guy website ([www.visguy.com](http://www.visguy.com)); Al Edlund for advice on page scaling; and David Parker for the Rules Tools ([www.visiorules.com](http://www.visiorules.com)) and for consultation on that subject.

Few people are more knowledgeable on the subject of BPMN than Dr. Bruce Silver ([www.brsilver.com](http://www.brsilver.com)). I appreciate his candid review of, and improvements to, the BPMN sections of Chapter 12.

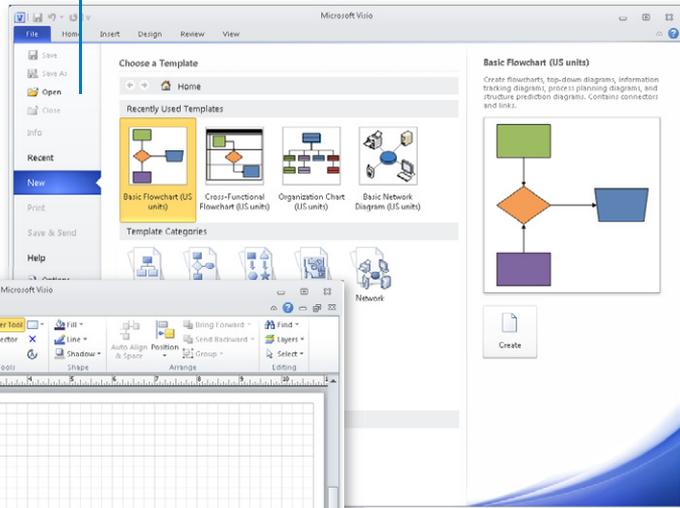
Thanks to the editorial teams at Microsoft Press, O'Reilly, and OTSI for their guidance and support throughout the development of this book. A very special thanks to copy editor Jaime Odell. It's difficult to imagine a more collaborative, professional, and yet downright pleasant editing experience. She's set the bar very high for the next book.

Thanks to eagle-eyed and thoughtful reader Wayne Dale for dozens of suggestions and corrections between the first and second printings of this book.

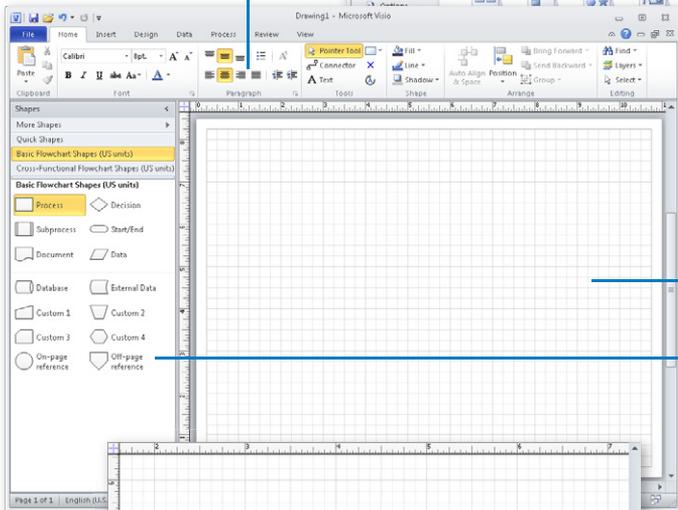
Finally, thanks to Kathy Brennan and Mike Cunningham. Our collective decision to build TaskMap as a Visio add-in started the journey of discovery that led to this book.

# Chapter at a Glance

Explore backstage functions, **page 6**

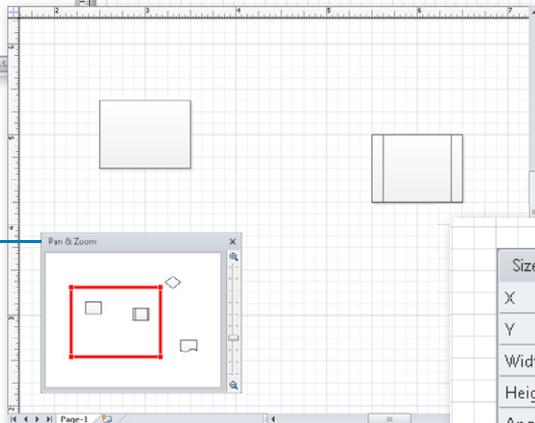


Use the Visio ribbon, **page 9**



Explore the drawing window, **page 17**

Manage the shapes window, **page 20**



Resize and reposition shapes, **page 29**

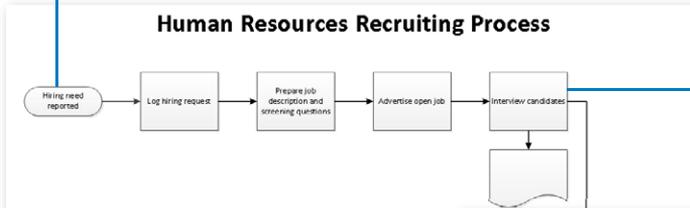
Pan and zoom in Visio, **page 24**

Size & Position - Decision	
X	7 in.
Y	3 in.
Width	1 in.
Height	0.75 in.
Angle	0 deg.
Pin Pos	Center-Center



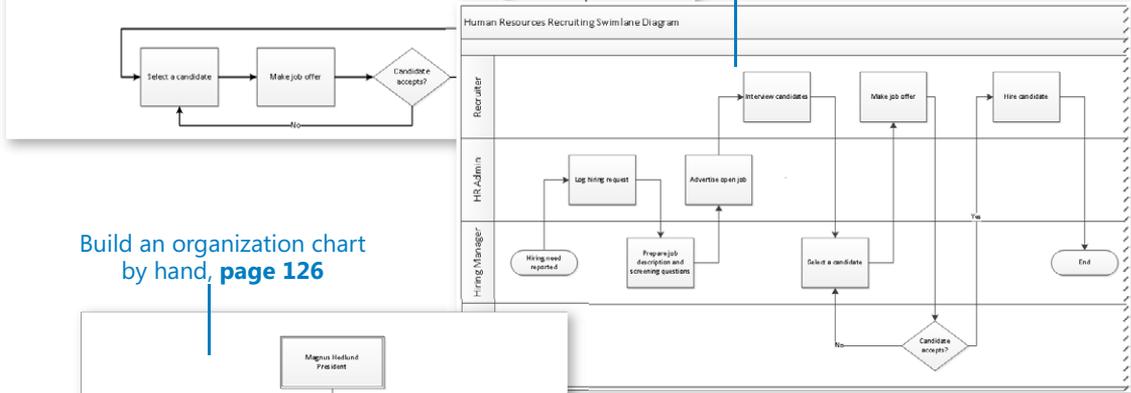
# Chapter at a Glance

Create a flowchart, [page 114](#)

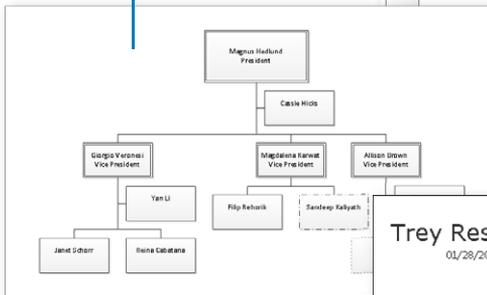


Add labels to a flowchart, [page 118](#)

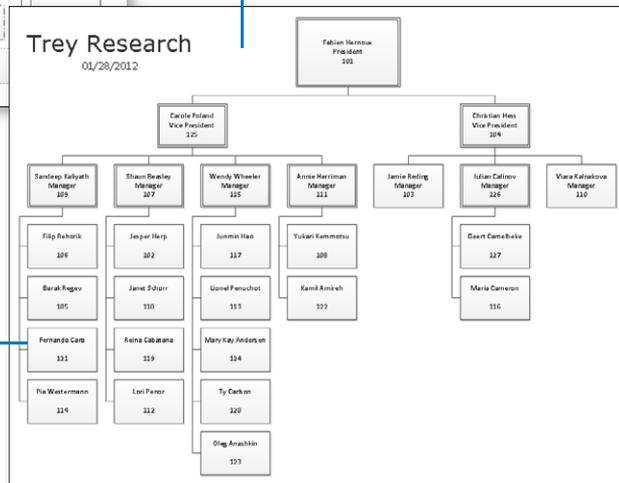
Create a swimlane diagram, [page 120](#)



Build an organization chart by hand, [page 126](#)



Use the Organization Chart wizard with existing data, [page 130](#)



Use the Organization Chart wizard with new data, [page 138](#)

# 4 Drawing the Real World: Flowcharts and Organization Charts

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## In this chapter, you will learn how to

- ✓ Select a flowchart type.
  - ✓ Create flowcharts.
  - ✓ Add labels to flowcharts.
  - ✓ Understand and create swimlane diagrams.
  - ✓ Understand organization charts.
  - ✓ Build an organization chart by hand.
  - ✓ Use the Organization Chart Wizard with existing or new data.
  - ✓ Enhance org charts with pictures.
- 

In the first three chapters, you learned many of the basic capabilities of Microsoft Visio 2010. In this chapter, you will apply that knowledge to creating real-world diagrams. There is no better place to start than with the humble *flowchart*, because creating flowcharts is one of the most common tasks for which people use Visio. In fact, according to Microsoft, one-third of all Visio diagrams are based on templates from the flowchart category.

Whether the end goal is to diagram the logic of a current or future software module, or to document the way that a work procedure is, or could be, performed, Visio flowcharts are the standard. Visio is also used to create an alternative type of flowchart called a *cross-functional flowchart* or *swimlane diagram*.

Another common application for Visio is to create *organization charts*, often known as *org charts*. You can create org charts manually by dragging the intelligent organization chart shapes from the Visio stencil onto the drawing page, or you can run the Organization Chart Wizard to automate the work of creating your drawing.

In this chapter, you will learn about different types of flowcharts and will create both conventional flowcharts and swimlane diagrams. You will also learn how to add text to Visio flowchart shapes. Finally, you'll learn how to build an organization chart by hand as well as by using the wizard, and how to enhance organization charts with pictures.

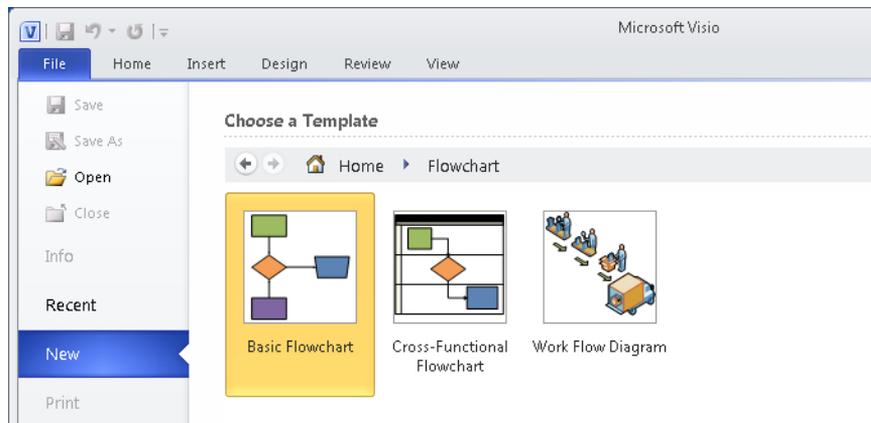
**Practice Files** Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the exercises in this chapter are in the Chapter04 practice files folder. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

## Selecting a Flowchart Type

Visio provides different flowchart templates, depending on the edition that you use.

### Visio Standard

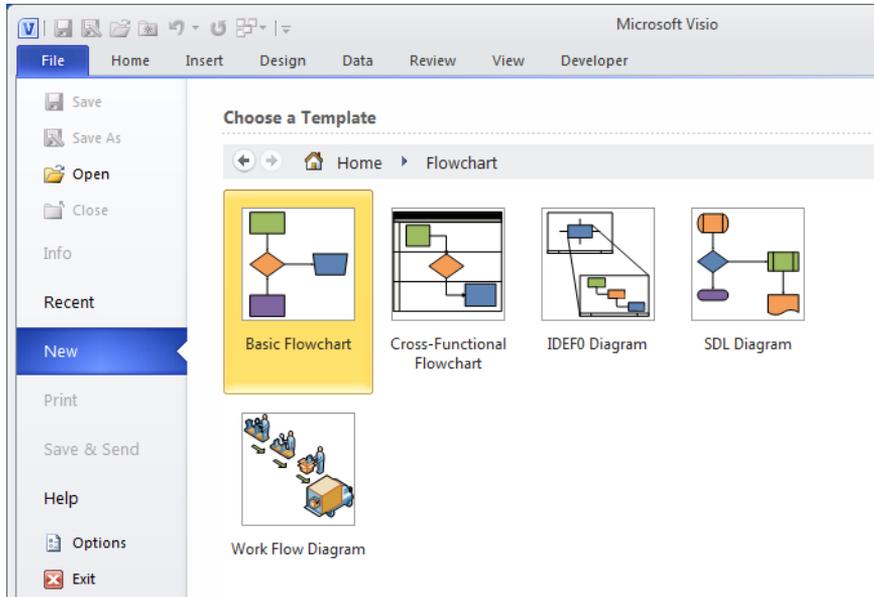
Visio Standard 2010 includes three flowchart templates, as shown in the following graphic. You will work with the Basic Flowchart and Cross-Functional Flowchart templates in this chapter.



### Visio Professional

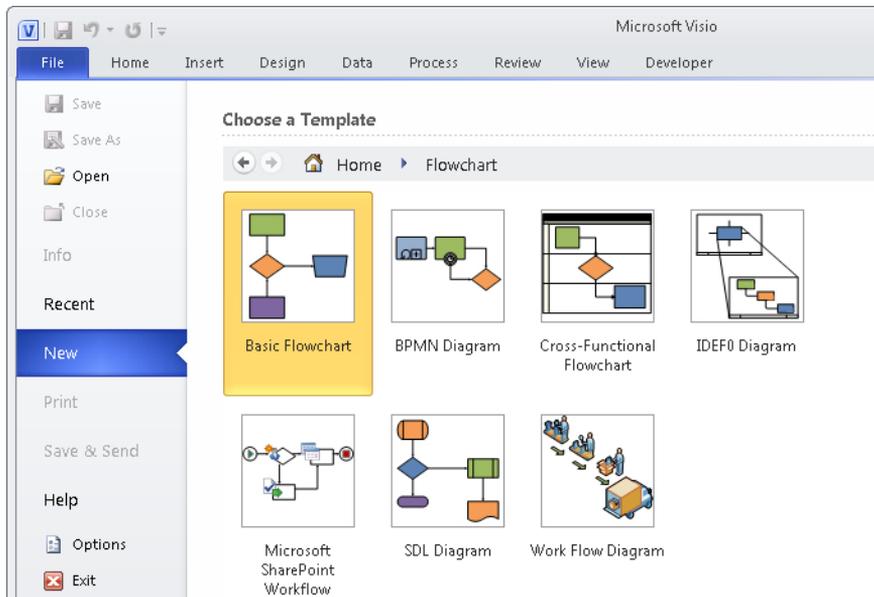
Visio Professional 2010 includes the same three flowcharts as the Standard edition but also includes two additional flowchart templates: IDEF0 and SDL Diagram.

**See Also** For additional information about IDEF0, go to [en.wikipedia.org/wiki/IDEF0](http://en.wikipedia.org/wiki/IDEF0). For additional information about SDL, go to [en.wikipedia.org/wiki/Specification\\_and\\_Description\\_Language](http://en.wikipedia.org/wiki/Specification_and_Description_Language).



## Visio Premium

Visio Premium 2010 adds two workflow templates beyond those available with the Professional edition. You will learn more about the BPMN Diagram and Microsoft SharePoint Workflow templates in Chapter 12, "Creating and Validating Process Diagrams."



## Vertical or Horizontal?

Should you draw your flowcharts with vertical (portrait) or horizontal (landscape) orientation? Vertical flowcharts, with tasks arranged from top to bottom, are probably more common, but there have always been advocates for the left-to-right, horizontal view.

One interesting note if you have created flowcharts with previous versions of Visio: the Visio 2010 Basic Flowchart template defaults to horizontal orientation, whereas previous versions presented a vertical view by default. Although this may frustrate people with a long-standing preference for the portrait view, there is some logic to this choice because computer screens have grown wider over the years.

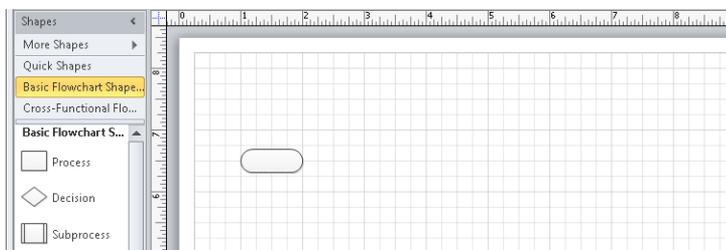
## Creating Flowcharts

In this exercise, you will create a new flowchart for a simple human resources recruiting process. The flowchart will have seven process steps and one decision.



**SET UP** Start Visio, or if it's already running, click the **File** tab, and then click **New**. In the **Template Categories** section, click **Flowchart**, and then double-click the **Basic Flowchart** thumbnail. Save the new drawing as *HR Recruiting Flowchart*.

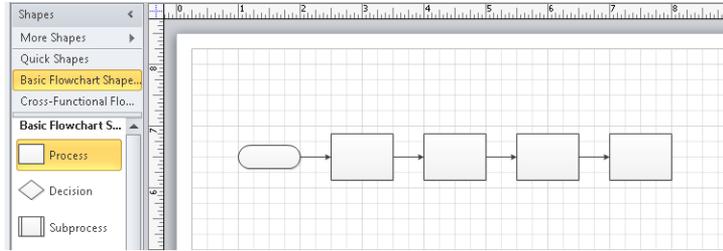
1. Drag a **Start/End** shape from the **Basic Flowchart Shapes** stencil onto the drawing page.



2. Click once on the **Process** shape in the stencil to select it.
3. Point to the start shape you added to the drawing page, and click the right-facing blue triangle that appears in order to add a **Process** shape from the pop-up **Quick Shapes** menu.

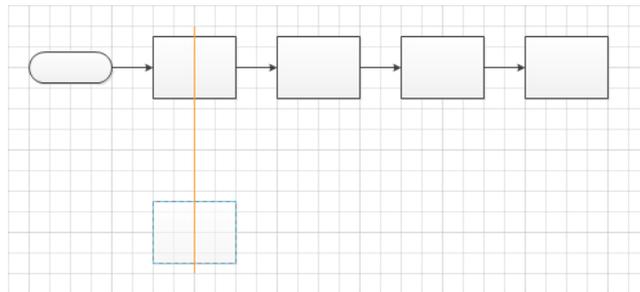
**See Also** For a refresher on using Quick Shapes, see "Using AutoConnect and Quick Shapes" in Chapter 2, "Creating a New Diagram."

- Use the same technique to add three more **Process** shapes to the page.

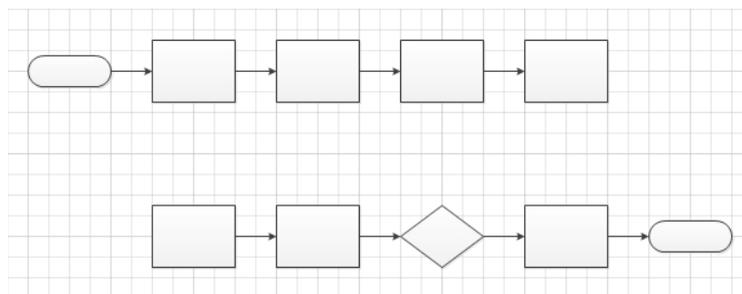


- Drag a **Process** shape onto the drawing page. Then use the Dynamic Grid to position the new process shape below the left-most process shape.

**See Also** For more information about the Dynamic Grid in Visio, see “Using Basic Shapes and the Dynamic Grid” in Chapter 2.



- From the **Quick Shapes** menu, add the following four shapes:
  - Another **Process** shape to the right of the one from Step 5.
  - A **Decision** diamond to the right of the previous process shape.
  - Another **Process** shape to the right of the decision diamond.
  - A **Start/End** shape to the right of the final process shape.



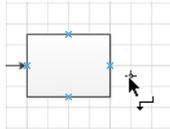
At this point, the flowchart is nearly complete with the exception of two connectors: one that links the end of the first row to the beginning of the second row, and one that links the decision diamond back to a previous step in the flowchart.



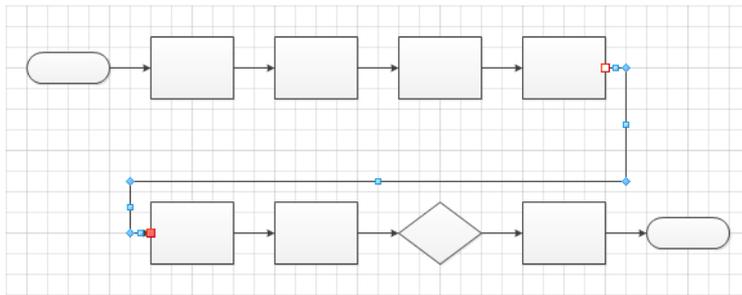
- On the **Home** tab, in the **Tools** group, click the **Connector** button, and then move the cursor near the last shape in the first row.

Notice two things:

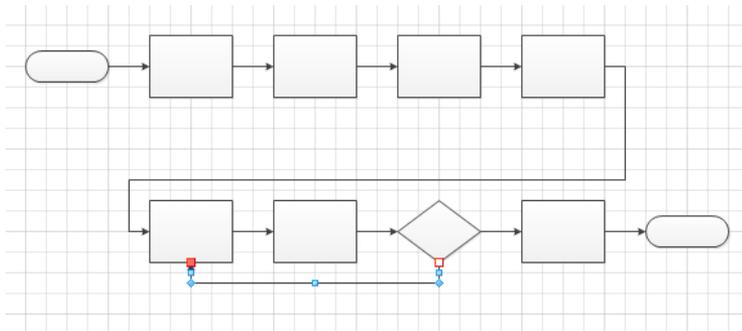
- The cursor has changed from a white arrow with a black outline (the **Pointer Tool**) to a black arrow with a connector beneath it (the **Connector Tool**).
- When you move the Connector Tool near a shape, small blue Xs, called **connection points**, appear at various places on the shape.



- Click the connection point on the right of the process shape, and then drag to the leftmost connection point on the first process shape in the second row.



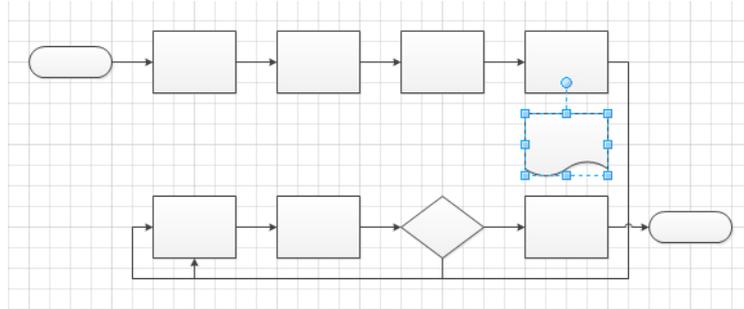
- Click the connection point on the bottom of the decision diamond, and then drag to the connection point on the bottom of the process shape two shapes to the left.



- On the **Home** tab, in the **Tools** group, click the **Pointer Tool** button to return the cursor to its normal operating mode.
- Drag a **Document** shape to just below the last process shape in the top row.

**Important** Do not drop the document shape on the connector line or Visio will break the connector in two and connect your document shape to both lines. This feature is called *AutoAdd* and is described in Chapter 2.

Notice that Visio automatically moved the connector line out of the way, which is generally good. However, because the new positioning isn't desirable for your flowchart, you will rearrange some of the shapes in the next step.



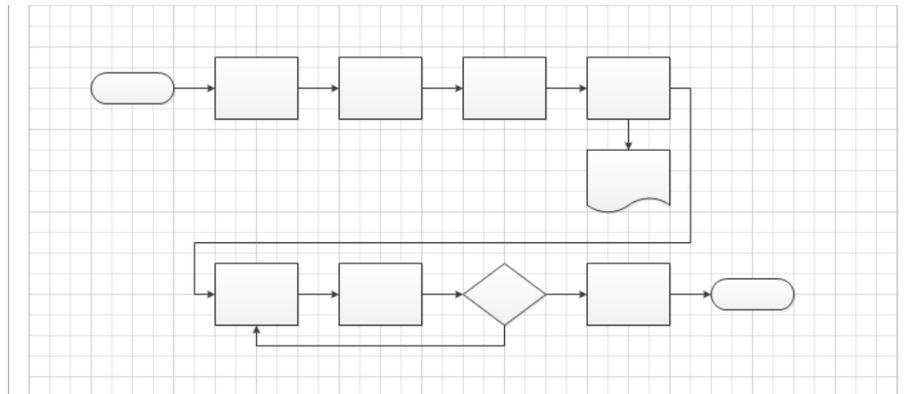
12. Drag a bounding box around all of the shapes in the bottom row. Then hold down the Shift key while you drag that row down to make more room.

**Tip** Holding down the Shift key constrains Visio to moving the selected shapes only vertically or horizontally, whichever is the first direction you move the cursor.

Once again, Visio will reposition the connector line to accommodate the new location of the bottom row.

13. Click the blue AutoConnect arrow under the upper-right process shape to connect it to the document shape.

The layout of your flowchart is now complete.



**CLEAN UP** Save your changes to the *HR Recruiting Flowchart* drawing but leave it open if you are continuing with the next exercise.

## Adding Labels to Flowcharts

In the preceding exercise, you learned the mechanics of creating a flowchart, but your diagram isn't very useful yet because your shapes have no labels, data, or identifying information.

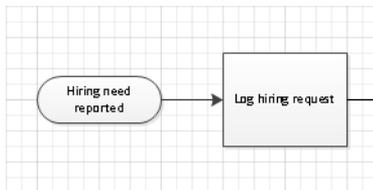
**See Also** For information about adding data to your shapes, see Chapter 6, "Entering, Linking to, and Reporting on Data."

In this exercise, you will add text labels to your flowchart shapes.



**SET UP** If you completed the preceding exercise, continue working with the *HR Recruiting Flowchart* drawing. If not, you need the *HR Recruiting Flowchart\_start* drawing located in the Chapter04 practice file folder to complete this exercise. Open the drawing in Visio and save it as *HR Recruiting Flowchart*.

1. Double-click the start shape in the upper-left of your diagram, and then type **Hiring need reported**.
2. Double-click the first process shape in your flowchart, and then type **Log hiring request**.

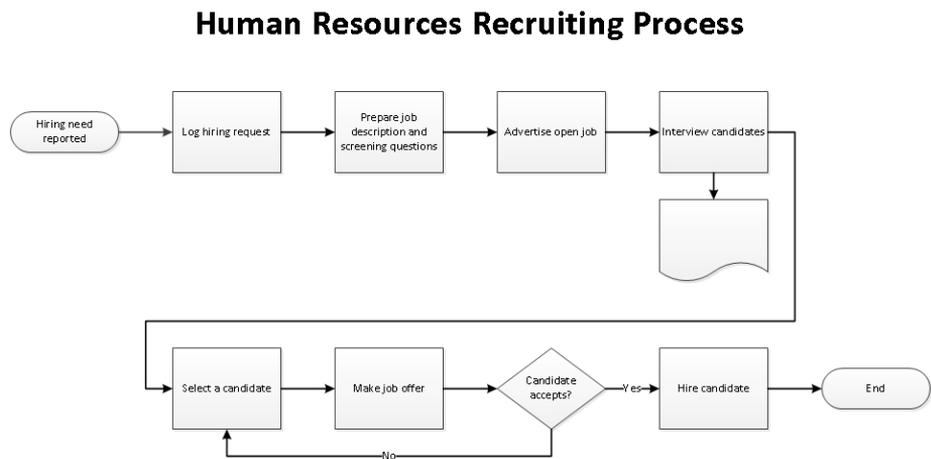


**Tip** You can also add text to most Visio shapes by clicking once to select the shape and then starting to type. That technique will work with the flowchart shapes.

3. Continue from left to right across the top row and add the following labels to the process shapes:
  - Prepare job description and screening questions**
  - Advertise open job**
  - Interview candidates**
4. Double-click and type the following text into the five shapes in the bottom row, moving from left to right:
  - Select a candidate**
  - Make job offer**
  - Candidate accepts?**
  - Hire candidate**
  - End**

5. Double-click the connector between the **Candidate accepts?** shape and the **Hire candidate** shape and type **Yes**.
6. Double-click the connector between the **Candidate accepts?** shape and the **Select a candidate** shape and type **No**.
7. Add a text box to the top of the page and type **Human Resources Recruiting Process** as a title for the flowchart.
8. Select the title text box, and then set the font size to **24 pt.** and make the text bold.

Your finished flowchart should look something like the following graphic.



**✘ CLEAN UP** Save your changes to the *HR Recruiting Flowchart* drawing, and then close it.

## Understanding Swimlane Diagrams

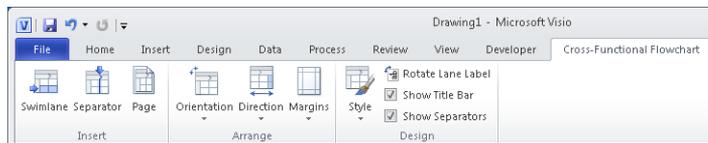
Swimlane diagrams are a popular variation on flowcharts because they correct one significant failing of flowcharts: very few flowcharts show who is responsible for each of the steps or who makes the key decisions.

A swimlane diagram, on the other hand, is specifically organized by role, function, or department. Each process step is placed into a specific lane based on who does the work or who has the responsibility for that process step. For example, a swimlane diagram with a focus on roles might include lanes marked *Accounts Payable Clerk*, *Accounting Supervisor*, and *Chief Financial Officer*. Similarly, a department-focused swimlane drawing might show lanes labeled *Sales*, *Marketing*, *Order Processing*, and *Manufacturing*.

Swimlane diagrams are also known as *cross-functional flowcharts* because they show work steps as they cross the functional boundaries in an organization. In this context, individual swimlanes are usually referred to as *functional bands*.

Regardless of the terminology, swimlane diagrams can be laid out with horizontal or vertical lanes. Using Visio, you can choose the orientation you prefer, as you'll see in the exercise in the following section.

**Tip** Some Visio templates employ additional software, outside of Visio itself, to perform their functions. The cross-functional flowchart diagram is an example of this type of Visio add-in. And, as is typical for this type of add-in, cross-functional flowcharts present a custom tab on the ribbon. The ribbon shown in the following graphic includes the Cross-Functional Flowchart tab.



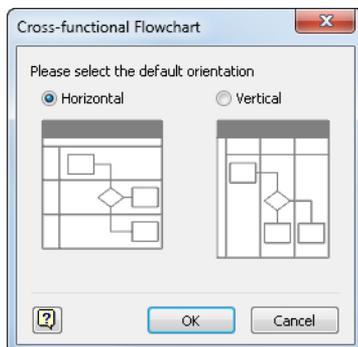
## Creating Swimlane Diagrams

In the preceding exercises, you created a flowchart of a human resources recruiting process. However, the flowchart does not indicate who is responsible for each task.

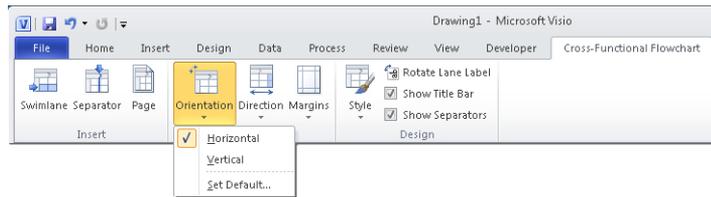
In this exercise, you will create a swimlane diagram of the same process. In doing so, you will organize the work steps into role-based lanes to make responsibilities clear.

➔ **SET UP** Click the **File** tab, and then click **New**.

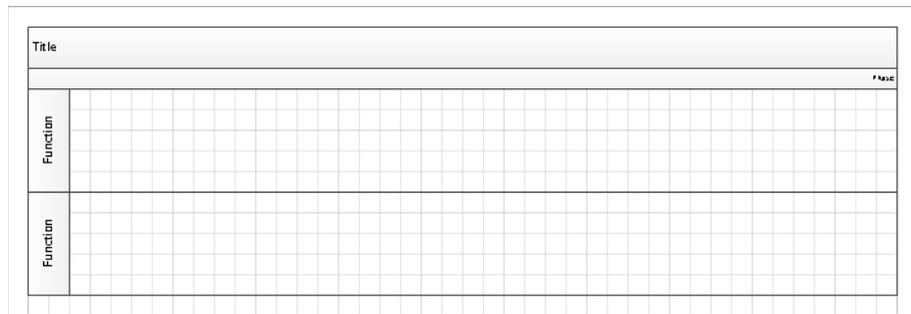
1. In the **Template Categories** section, click **Flowchart**, and then double-click the **Cross-Functional Flowchart** thumbnail. The orientation selection dialog box opens.



**Tip** If you have previously selected a default orientation, this dialog box will not appear again. However, you can still change both the orientation of a single diagram and the default for future diagrams. On the Cross-Functional Flowchart tab, in the Arrange group, click the Orientation button and make your selection.



2. Click **OK** to select a **Horizontal** layout. The swimlane add-in places a title band and two swimlanes onto the drawing page.



3. On the **Cross-Functional Flowchart** tab, in the **Insert** group, click the **Swimlane** button twice to add two more lanes to your diagram.

**Tip** There are three other ways to add swimlanes, each of which is useful at various times:

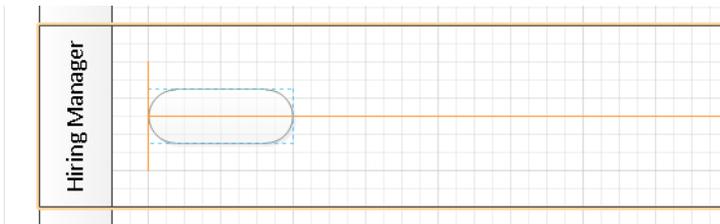
- Right-click the header of an existing lane, and Visio offers you a choice of adding a new swimlane above or below the one you’ve selected.
- Drag a Swimlane shape from the stencil and drop it on top of an existing lane.
- Point to the boundary between lanes, with the cursor just outside the swimlane structure, and click the blue insertion triangle. (You will learn about the final method in Chapter 11, “Adding Structure to Your Diagrams.”)

You’ve probably already figured this out, but swimlane diagrams are so named because they resemble a swimming pool viewed from above.

4. Double-click the **Title** bar and type **Human Resources Recruiting Swimlane Diagram**.
5. Double-click the **Function** title bar for the top swimlane and type **Recruiter**.
6. Type **HR Admin** as the title for the second swimlane, **Hiring Manager** for the third swimlane, and **Candidate** for the bottom swimlane.

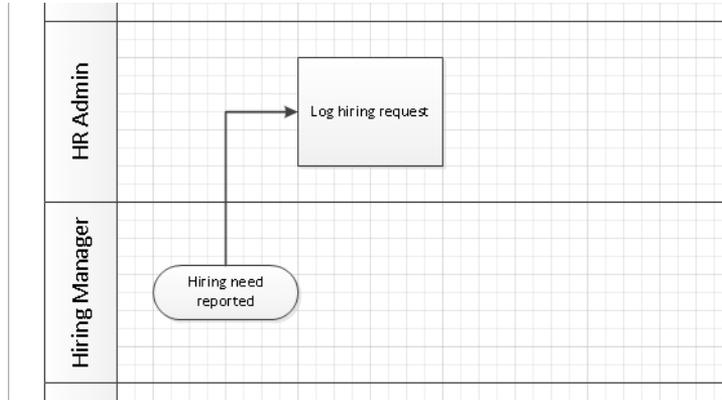


7. Drag a **Start/End** shape from the **Basic Flowchart Shapes** stencil onto the drawing page and use the Dynamic Grid to position it in the **Hiring Manager** lane.

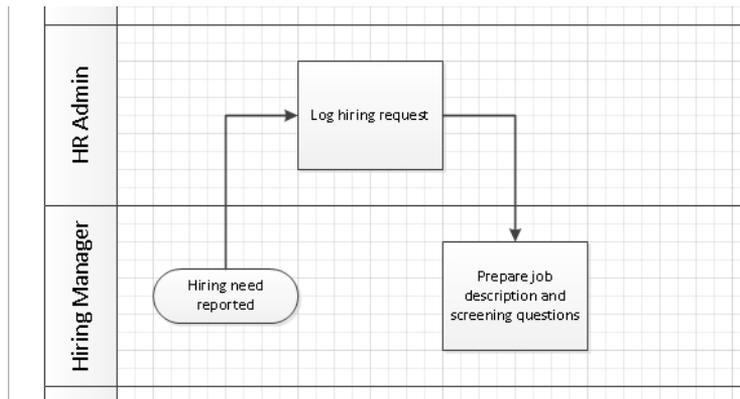


8. Click the start/end shape and type **Hiring need reported**.
9. Drag a **Process** shape into the **HR Admin** lane, dropping it to the right of the start/end shape, and then type **Log hiring request**.
10. On the **Home** tab, in the **Tools** group, click the **Connector** button, and then draw a connector from the top of the **Hiring need reported** shape to the left side of the **Log hiring request** shape.





11. Drag a **Process** shape into the **Hiring Manager** lane, and then type **Prepare job description and screening questions**.
12. Use the **Connector** tool to link the previous process step to your new task.



13. Continue adding flowchart shapes to your diagram using the information in rows 4-10 of the following table. (Rows 1-3 represent the shapes you've already added.) As you add each shape, draw a connector from the previous row's shape to the new shape.

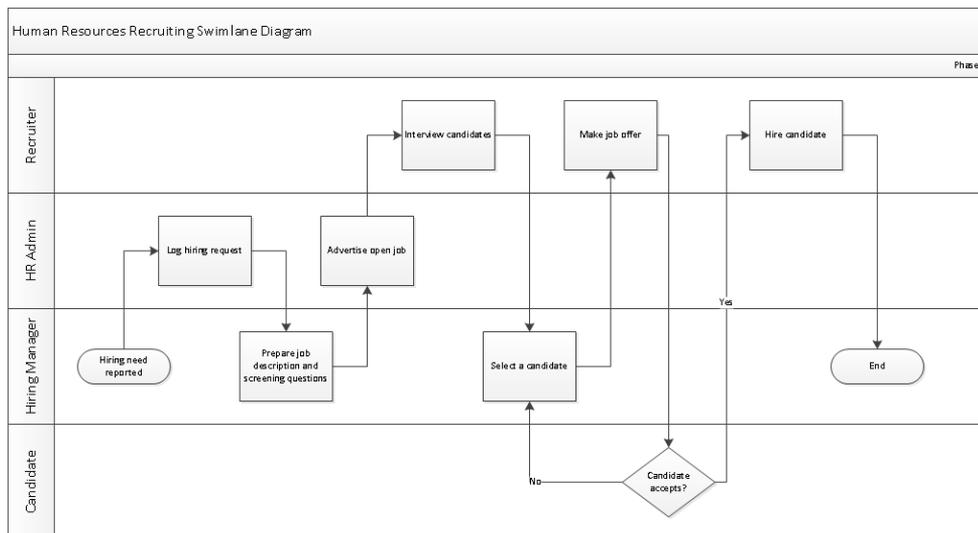
	Shape	Swimlane	Shape text
1	Start/End	Hiring Manager	Hiring need reported
2	Process	HR Admin	Log hiring request
3	Process	Hiring Manager	Prepare job description and screening questions
4	Process	HR Admin	Advertise open job
5	Process	Recruiter	Interview candidates
6	Process	Hiring Manager	Select a candidate

	Shape	Swimlane	Shape text
7	Process	Recruiter	Make job offer
8	Decision	Candidate	Candidate accepts?
9	Process	Recruiter	Hire candidate
10	Start/End	Hiring Manager	End

14. Add a connector from the bottom of the **Candidate accepts?** shape to the bottom of the **Select a candidate** shape.
15. Click the connector from the **Candidate accepts?** shape to the **Hire candidate** shape and type **Yes**.
16. Click the connector from the **Candidate accepts?** shape to the **Select a candidate** shape and type **No**.

Your swimlane diagram should look something like the following graphic. It's unlikely that your drawing will look exactly like this one because you probably made different decisions about placing and connecting shapes. However, after you have the general placement and connectivity correct, you can adjust and tweak your diagram to make it look the way you'd like.

If you think your diagram is too crowded, realize that the cross-functional flowchart template used the default paper size for your region. If you need more space, you can increase the drawing page size as described in Chapter 3, "Adding Sophistication to Your Drawings."



**CLEAN UP** Save the drawing as *HR Recruiting Swimlane*, and then close it.

One final note about the Visio 2010 take on cross-functional flowcharts: although the end result looks very much as it has in previous versions of Visio, the underlying structure is very different. In fact, structure is the operative word in the previous sentence. In Visio 2010, each swimlane is a *container*, and the overall framework is a *list*. Containers and lists are key components of Visio 2010 structured diagrams and are described in Chapter 11.

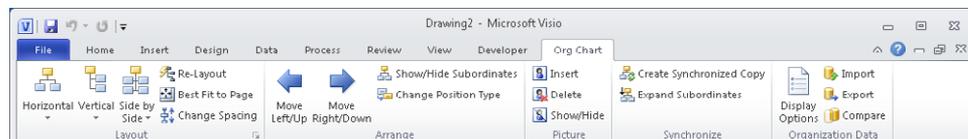
## Understanding Organization Charts

An organization chart is typically used to reflect the structure of an organization by showing who reports to whom. The Visio organization chart solution is based on a hierarchical model in which each employee has one boss. Consequently, it doesn't lend itself to organizations that use a matrix or other nonhierarchical structure. However, it is well-suited for most organizations.

Some org charts are simple and unadorned, showing just names and titles. Other org charts are more sophisticated and might display additional departmental or personal information, including photographs. Like most Visio templates, the org chart template includes a set of intelligent shapes. However, the org chart shapes are assisted by add-in software that is packaged with Visio. The combination of the two simplifies the creation of org charts by handling nearly all of the sizing and spacing chores when you do things like drop an employee shape on top of a manager shape. In addition, the add-in software includes a wizard that you can use to import organization data from Microsoft Excel or other data sources.

The org chart add-in also displays an add-in tab on the Visio ribbon whenever an org chart is the active drawing.

**See Also** For more information about add-in tabs, see “Understanding Add-in Tabs” in Chapter 1, “A Visual Orientation to a Visual Product.”



In the sections that follow, you will create a simple org chart manually and a more complex org chart by using data in an Excel workbook.

## Building an Organization Chart by Hand

You will use the Organization Chart Wizard in the next two exercises, but it's important to understand first how easy it is to create org charts by hand.

In this exercise, you will create a new org chart by dragging shapes onto the page and using the org chart template's auto-positioning features. You will also enter data for each shape in the chart.

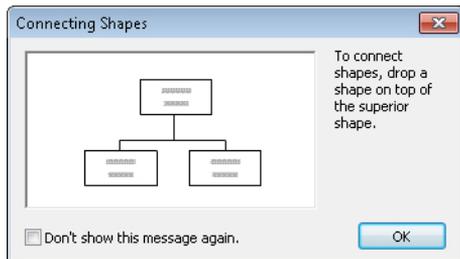


**SET UP** Click the **File** tab and then click **New**. In the **Template Categories** section, click **Business**, and then double-click the **Organization Chart** thumbnail. Save the new drawing as *Org Chart by Hand*.

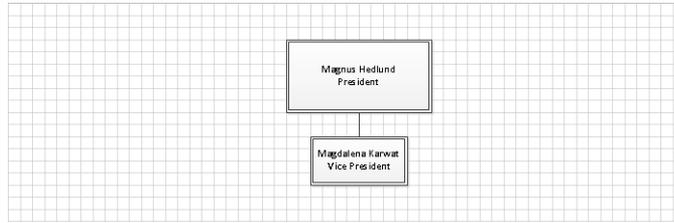
**Tip** The only difference between the template called **Organization Chart** and the one called **Organization Chart Wizard** is that the latter automatically starts a wizard when you open a new document. If you select the **Organization Chart Wizard** by mistake for this exercise, just cancel the wizard and you can continue.

1. Drag the **Executive** shape from the **Organization Chart Shapes** stencil to the top center of the drawing page.

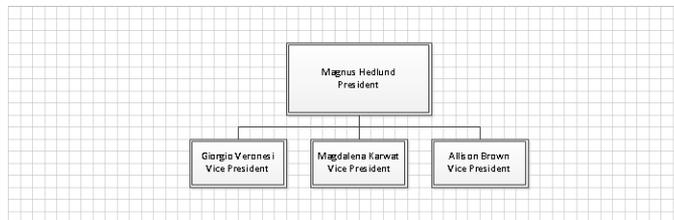
The org chart add-in presents an animated dialog box showing how to add additional shapes to the chart unless you have previously turned it off. You can select the check box in the lower-left of the dialog box to suppress future display of the animated help.



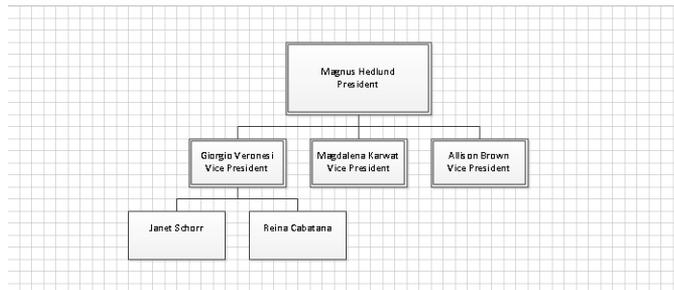
2. With the shape still selected, type **Magnus Hedlund**. Then press Enter and type **President** on the second line.
3. Drag a **Manager** shape onto the **Magnus Hedlund** shape. Then type **Magdalena Karwat**, press Enter, and type **Vice President**. Notice that the org chart software automatically positions the new shape below the *Hedlund* shape.



4. Repeat Step 3 and notice that the org chart add-in has positioned the second manager shape to the side of the first one. With the new shape still selected, type **Allison Brown**, press Enter, and then type **Vice President**.
5. Drag one more **Manager** shape onto the **Hedlund** shape. Type **Giorgio Veronesi**, press Enter, and then type **Vice President**.

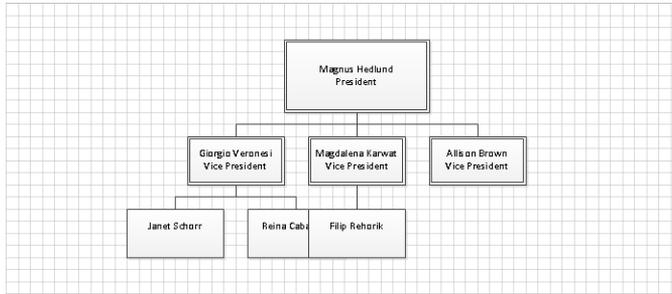


6. Drag two **Position** shapes onto the **Giorgio Veronesi** shape, then type **Janet Schorr** into the first one and **Reina Cabatana** into the second.



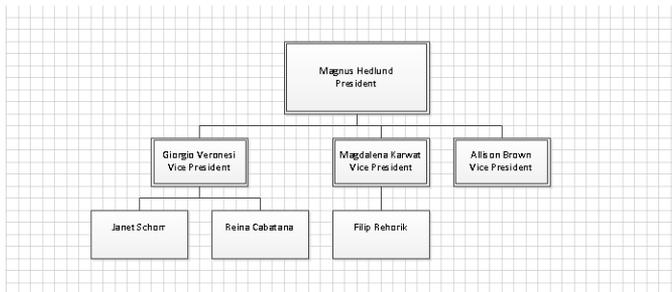
7. Drag one **Position** shape onto the **Magdalena Karwat** shape and type **Filip Rehorik**.

The org chart's shape placement mechanism has hidden part of the Reina Cabatana shape behind the Filip Rehorik shape.



Re-Layout

8. On the **Org Chart** tab, in the **Layout** group, click the **Re-Layout** button to solve the problem.



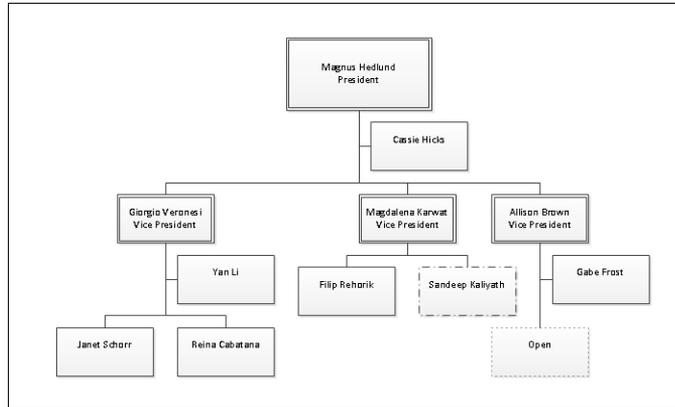
**Tip** There may be times when you don't like the changes made by the re-layout function. If that's the case, simply press **Ctrl+Z** or click the **Undo** button on the **Quick Access Toolbar**. No matter how extensive the changes, a single undo will return the diagram to its previous layout.

9. Drag a **Consultant** shape onto the **Magdalena Karwat** shape and type **Sandeep Kaliyath**. Notice that consultant shapes have a dash-dot outline.
10. Drag a **Vacancy** shape onto the **Allison Brown** shape and type **Open**. Notice that vacancy shapes have a dotted outline.
11. Drag an **Assistant** shape onto the **Allison Brown** shape and type **Gabe Frost**.
12. Drag an **Assistant** shape onto the **Giorgio Veronesi** shape and type **Yan Li**.
13. Drag an **Assistant** shape onto the **Magnus Hedlund** shape and type **Cassie Hicks**.
14. On the **Org Chart** tab, in the **Layout** group, click the **Re-Layout** button.

**Tip** You can also initiate page layout by right-clicking anywhere on the background of an org chart page and selecting **Re-layout** from the context menu.

The org chart add-in has rearranged your drawing to position all of your shapes. Take note of the dash-dot consultant, the dotted vacancy, and the placement of the assistant shapes under Magnus Hedlund, Allison Brown, and Giorgio Veronesi.

At this point, you've built a reasonably sophisticated organization chart by doing little more than dragging shapes and typing text.



**✖ CLEAN UP** Save your changes to the *Org Chart by Hand* drawing, and then close it.

## Altering Org Chart Shapes

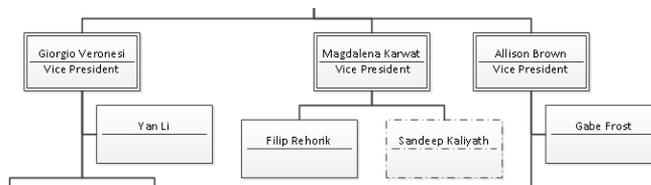
Whether you create an organization chart manually, as you've just done, or automatically using the wizard, you might want to modify the appearance and attributes of the org chart shapes after they're on the page. The Visio organization chart add-in provides a number of easy ways to make changes.

### Type

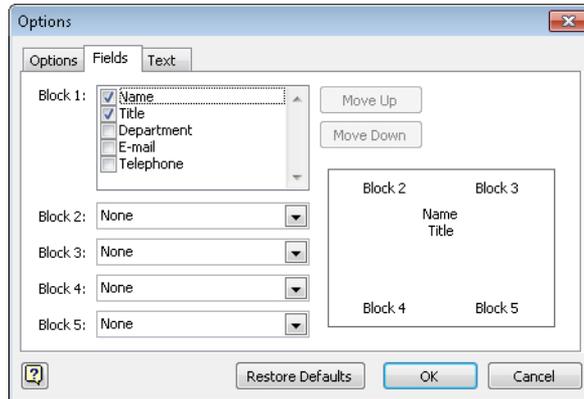
You can right-click any org chart shape to change its type. For example, in the organization chart you created in the preceding exercise, you identified a vacancy in Allison Brown's group, symbolized by a dotted outline around the position box. When Allison hires a person to fill that vacancy, simply right-click the vacant position shape, click Change Position Type, click Position, and then click OK.

### Appearance

You can change the appearance of the org chart shapes by adding a dividing line between the position and the title. To do so, select some or all of the shapes on the page, right-click any of the shapes, and then click Show Divider Line.



You can also affect the appearance of org chart shapes by showing additional data on each shape. For examples of what is possible, on the Org Chart tab, in the Organization Data group, click the Display Options button. In the resulting Options dialog box, click the Fields tab to see your choices.



On the other tabs in this dialog box, you can change the size and spacing of org chart shapes and the size and formatting of the text.

**See Also** You can change the appearance of an organization chart quite dramatically by applying *themes*. For details and examples, see “Applying Themes to Your Diagrams” in Chapter 5, “Adding Style, Color, and Themes.”

## Using the Organization Chart Wizard with Existing Data

What if you already have your organization data available in electronic form? For example, you might have:

- An Excel workbook that already contains names and reporting information.
- A Human Resources or Enterprise Resource Planning (ERP) system that can generate an Excel file or a text file.
- Organization data in a Microsoft Exchange Server directory.
- Organization data in a Microsoft Access, dBase, or other database.

In all of those situations, the org chart wizard can help you to create your chart.

In this exercise, you will use data in an Excel workbook to build an organization chart.



**SET UP** You need the *Org Chart Data\_start* workbook located in the Chapter04 practice file folder to complete this exercise.

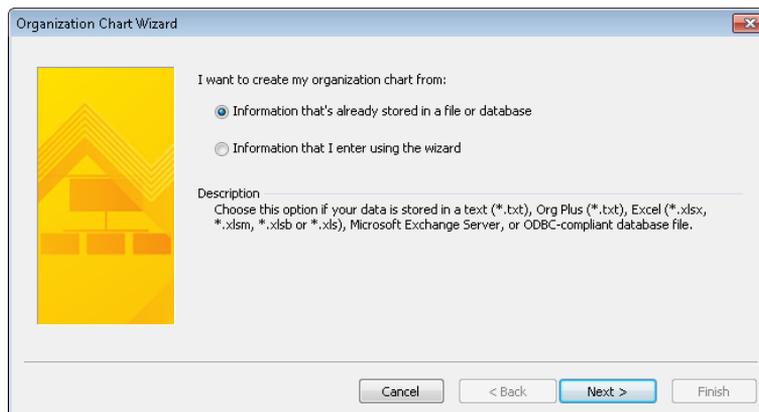
1. Start Excel, open the *Org Chart Data\_start* workbook, and save it as *Org Chart Data*. While the workbook is open, look at the data that will be used in this exercise. In particular, notice that there are columns for Name, Title, Reports To, Employee Number, and Extension.

	Employee				
1	Name	Title	Reports To	Number	Extension
2	Fabien Hernoux	President		367911	101
3	Carole Poland	Vice President	Fabien Hernoux	345180	125
4	Christian Hess	Vice President	Fabien Hernoux	367929	104
5	Wendy Wheeler	Manager	Carole Poland	345150	115
6	Shaun Beasley	Manager	Carole Poland	367947	107
7	Sandeep Kaliyath	Manager	Carole Poland	367959	109
8	Annie Herriman	Manager	Carole Poland	345138	111
9	Jamie Reding	Manager	Christian Hess	367923	103
10	Viara Kalnakova	Manager	Christian Hess	367965	110

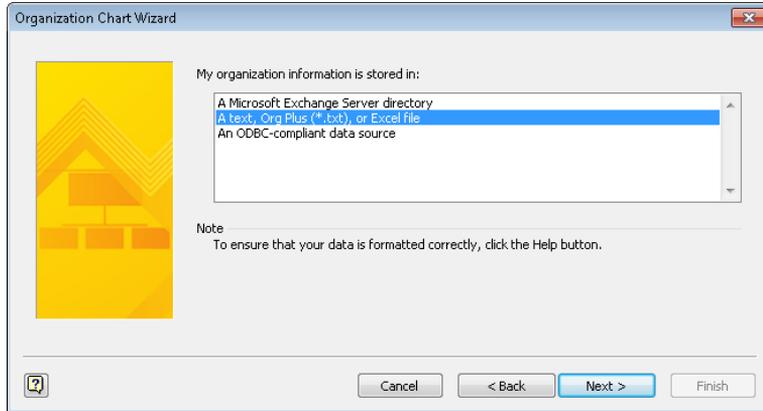
2. Close Excel, and then start Visio.
3. In the **Template Categories** section, click **Business**, and then double-click the **Organization Chart Wizard** thumbnail.

**Tip** The only difference between the template called **Organization Chart Wizard** and the one called **Organization Chart** is that the former automatically starts a wizard when you open a new document. If you select **Organization Chart** by mistake for this exercise, just click the **Import** button in the **Organization Data** group on the **Org Chart** tab to launch the wizard.

The first page of the wizard appears.

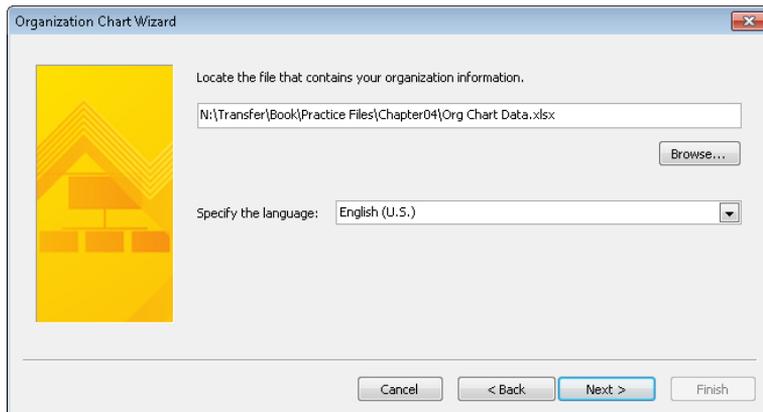


4. Click **Next**. The data source type page appears.



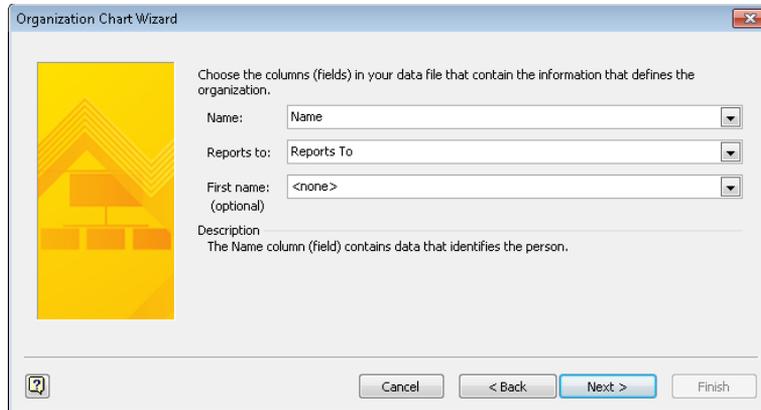
5. Click **A text, Org Plus (\*.txt), or Excel file**, and then click **Next**. The file selection page appears.
6. Click the **Browse** button on the file selection page, and then, in the resulting file open dialog box, navigate to the *Org Chart Data* workbook. After selecting the correct file, click the **Open** button.

The file name you selected appears in the Locate The File That Contains Your Organization Information box.



7. Click **Next**. There is a slight pause as Visio opens and reads the data in your spreadsheet.

The Organization Chart Wizard uses the column names, if any, in your spreadsheet to determine which columns hold the name and reporting structure information. It displays the column names that seem to be the best match in the next wizard page.

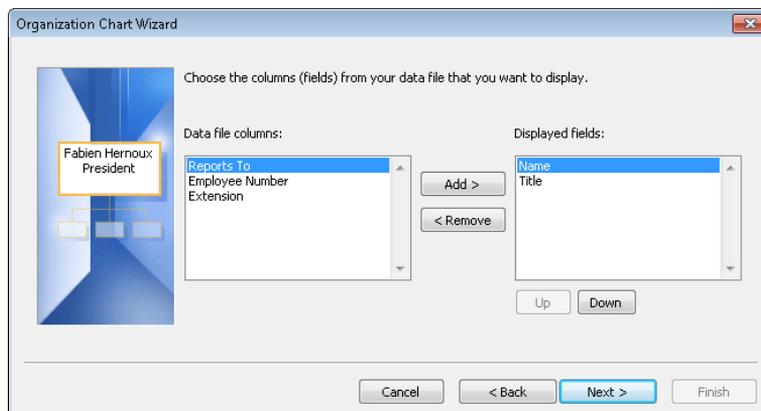


Because the *Org Chart Data* workbook contains columns called *Name* and *Reports To*, the assumptions made by Visio are correct as shown. If the assumptions are not correct, click the arrows to the right of *Name* and *Reports To* in order to select the correct columns.

Notice you can specify that a separate column contains employees' first names, if that is the case.

**8. Click **Next**.**

The next Organization Chart Wizard page provides an opportunity for you to select which employee data will be displayed on each shape in the chart. The wizard assumes that you want to display the name and title fields, so those fields are pre-selected on the right side of the page.

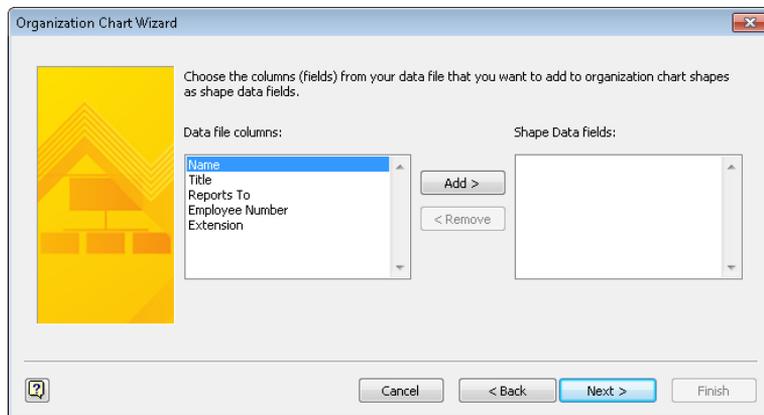


**Tip** You can control the vertical positioning of the data fields you've chosen with the **Up** and **Down** buttons below the **Displayed Fields** section of the page. The pane on the left side of the page provides a live preview of the data as it will be displayed in the org chart.

9. In the **Data file columns** section of the page, click **Extension**, and then click the **Add** button to move it to the **Displayed fields** section. Finally, click **Next**.

On the wizard page that appears, you determine which spreadsheet data, if any, should be stored in each organization chart shape. This is a separate and unrelated decision from the one on the previous page. You can still display data on the org chart shapes even if you don't store data in the shapes.

**Tip** The primary reason to store data in org chart shapes is to allow you to run reports or use the data in other ways without the need to revert to your original data source.

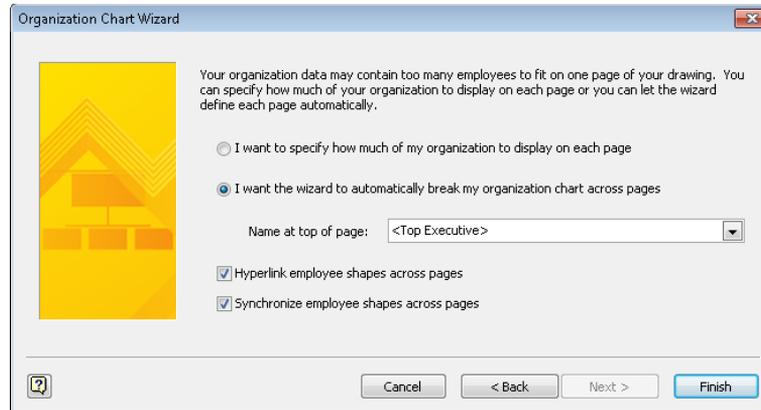


10. To add all fields to the shape, hold down the Shift key while clicking **Extension**, which selects everything in the **Data file columns** section, click **Add**, and then click **Next**.

**Tip** You can use the standard Windows conventions for selecting multiple items in the **Data File Columns** section:

- Hold down Shift and click to select everything from the current selection up to and including the item you click.
- Hold down Ctrl and click to select noncontiguous items.

On the final wizard page, you can choose among some of the Organization Chart Wizard's powerful layout options.



Accepting the default selection of **I Want The Wizard To Automatically Break My Organization Chart Across Pages** lets the wizard figure out how much to fit on each Visio page. The **<Top Executive>** option tells Visio to select the person who doesn't report to anyone else as the top shape on the first page of the org chart. If you prefer to select a specific person (like a department head), you can click the arrow to choose anyone in your list.

Clicking **I Want To Specify How Much Of My Organization To Display On Each Page** takes you to a wizard page not shown here, and allows you to control more directly how much to fit on each org chart page.

The **Hyperlink Employee Shapes Across Pages** check box specifies whether the wizard should add hyperlinks when org charts consist of multiple pages. For example, if a manager's direct reports don't fit on the page with the manager, the wizard will leave the manager shape on the original page and also place it on a subsequent page along with that manager's direct reports. A check mark in this option tells Visio to add links in both manager shapes, making page-to-page navigation simpler.

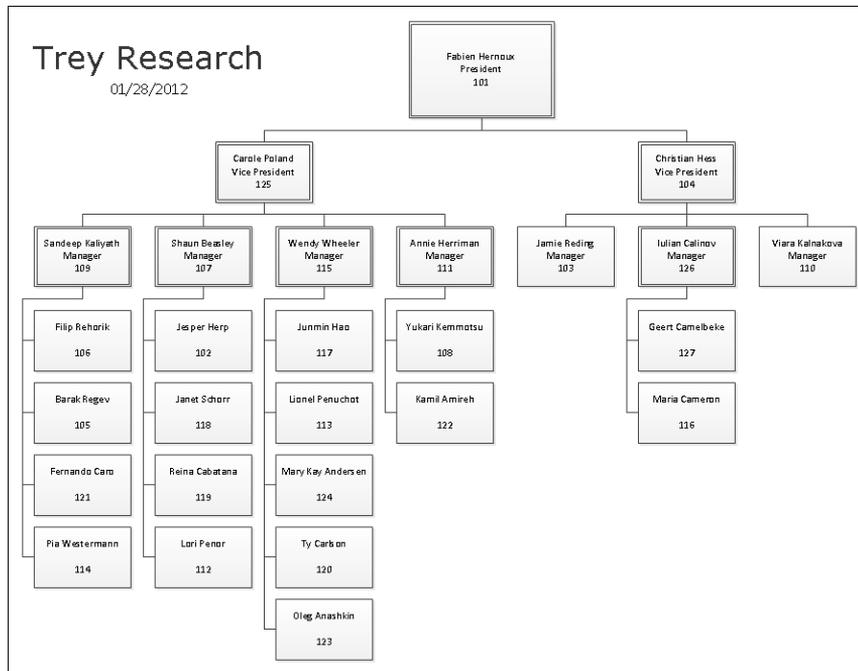
The **Synchronize Employee Shapes Across Pages** check box also applies to the scenario described in the preceding paragraph. A check mark in this option tells Visio to update the second shape if you change the data in the first one.

- 11.** Click **Finish**. The completed organization chart appears in the Visio drawing window.

**Tip** The org chart wizard correctly connects each group of people to its respective boss, but you cannot control where the wizard places people on the page. You can relocate people and groups after the wizard has created the diagram; you just can't control how the wizard does the initial placement.

12. To finalize your organization chart, drag the **Title/Date** shape from the stencil into the upper-left portion of the drawing page.
13. Double-click the **Company Name** text box and replace *Company Name* with **Trey Research**. The resulting organization chart should look like the following graphic.

The wizard has chosen one particular style and layout for your organization chart. However, you can experiment with more than a dozen built-in layouts to change the look of your chart as described in the following sidebar.



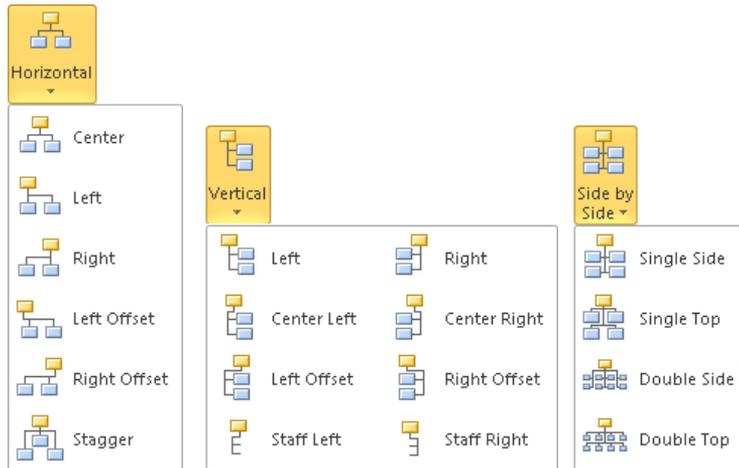
**CLEAN UP** Save your drawing as *Org Chart using Wizard* and then close it.

## Altering Org Chart Layout

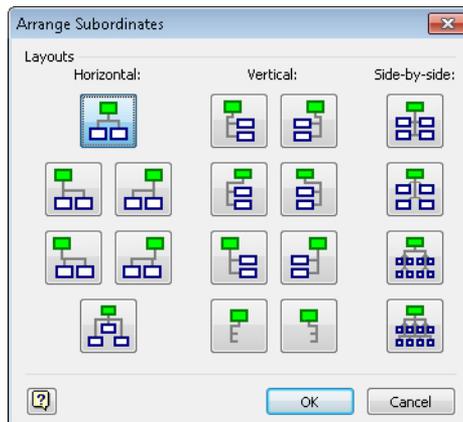
Although the org chart wizard has used a default layout for your chart, you can change the layout, move shapes and groups of shapes, and hide parts of the chart.

### Rearrange

You can change the layout of an org chart by using more than a dozen predefined layouts supplied with Visio. On the Org Chart tab, in the Layout group, click Horizontal, Vertical, or Side By Side to select from a variety of options.



As an alternative, right-click any shape with subordinates, and then click Arrange Subordinates. Visio opens a dialog box showing all of the built-in layouts.



**Tip** If you don't like the results of any re-layout operation—no matter how radical the changes—you can restore the previous layout with a single undo.

### Move

You can adjust the layout of an organization chart by moving shapes or groups of shapes left/right or up/down. Look for the Move buttons in the Arrange group on the Org Chart tab. For example, in the completed *Org Chart using Wizard* drawing from the preceding exercise, select the vice president named *Christian Hess*, and then click the Move Left/Up button to see the effect.

### Hide

If you want to hide some sections of your org chart, click the Hide Subordinates or Show Subordinates options on a shape's shortcut menu or the Show/Hide Subordinates button in the Arrange group on the Org Chart tab.

## Using the Organization Chart Wizard with New Data

If your organization data is not in a format that Visio can read and you would like to type it into a spreadsheet but don't want to start from scratch, the Organization Chart Wizard can create a preformatted spreadsheet for you.

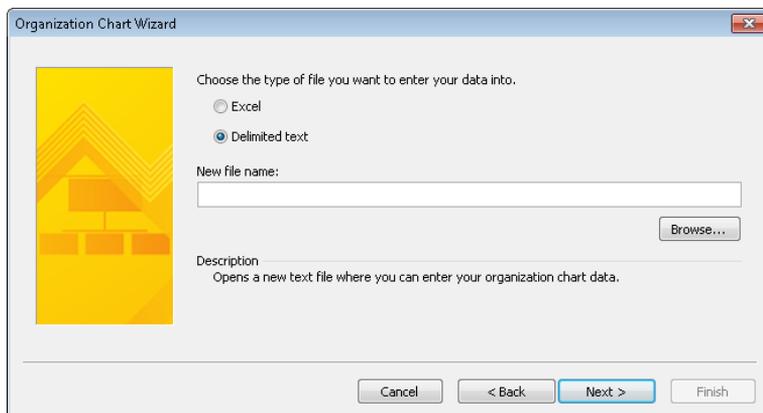
In this exercise, you will use the Organization Chart Wizard to create an Excel workbook into which you will enter your organization data.



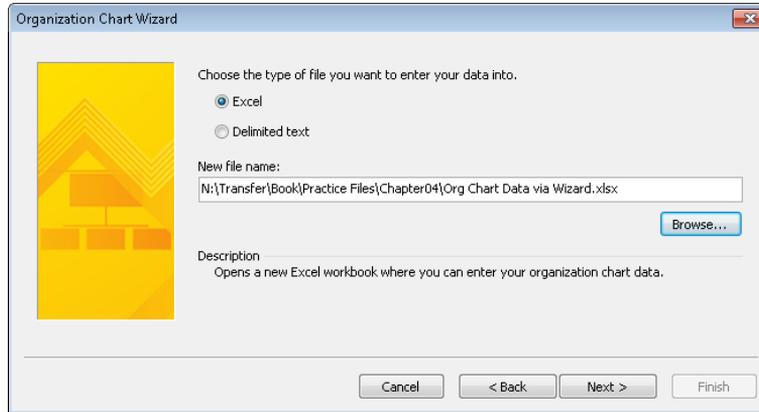
**SET UP** Click the File tab, and then click New. In the Template Categories section, click Business, and then double-click the Organization Chart Wizard thumbnail.

1. On the first page of the **Organization Chart Wizard**, click **Information that I enter using the wizard**.

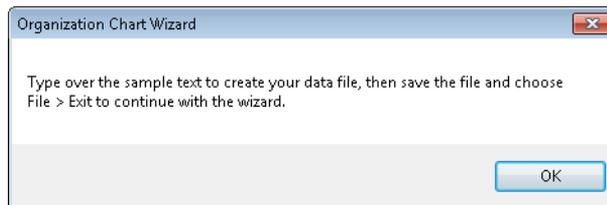
Notice that the description text for this option confirms that you will be creating a new data source.



2. Click **Next**. The file type selection page appears.
3. On the file type selection page, click **Excel**, and then click the **Browse** button. In the resulting dialog box, select a folder in which to save the file, type **Org Chart Data via Wizard** in the **File name** box, and then click the **Save** button.  
The selected file name appears in the New File Name box on the next wizard page.



4. Click **Next**. Visio instructs you to type your data over the sample data provided in the Excel workbook it has created.



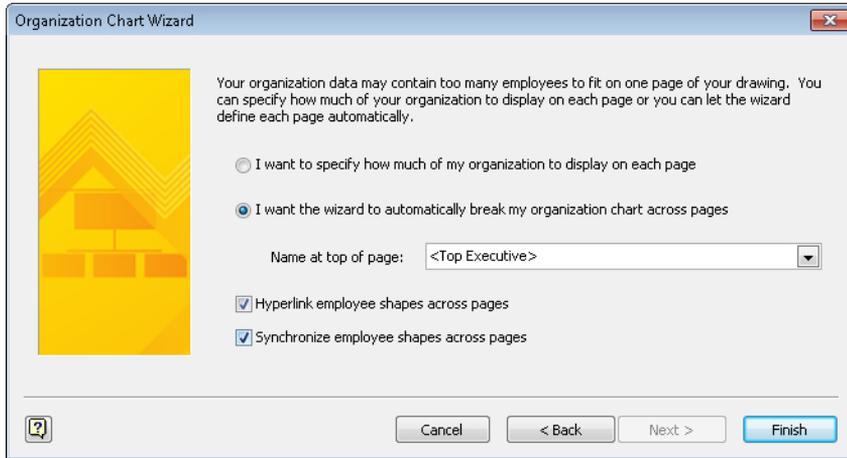
5. Click **OK**. Excel opens to display the formatted workbook. As shown in the following graphic, notice that each column heading includes a comment with instructions for entering data in that column.

	A	B	C	D	E
	Name	Reports_to	Department	Telephone	
1					
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					
7					

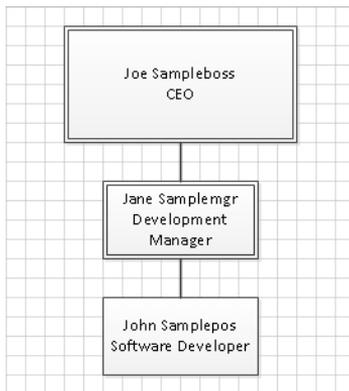
6. Ordinarily, you would type your data into the worksheet at this point; however, for this exercise you will use the sample data, so just close Excel.

**Important** Closing the worksheet isn't sufficient; you must close the Excel application.

When you close Excel, Windows returns the focus to Visio, where you will see the final page of the Organization Chart Wizard.



7. Click **Finish** to display your org chart.



**CLEAN UP** Save the sample file if you want to keep it.

## Enhancing Org Charts with Pictures

Visio 2010, like previous versions, gives you the option to add images to organization chart shapes. You can right-click a shape to add a picture or you can click the buttons in the Picture group on the Org Chart tab.

However, Visio only allows you to add or delete pictures one shape at a time. If you would like to add pictures to multiple shapes at once, check out an article and code sample provided by Visio MVP John Goldsmith at [visualsignals.typepad.co.uk/vis-log/2008/06/linking-org-chart-images.html](http://visualsignals.typepad.co.uk/vis-log/2008/06/linking-org-chart-images.html).

### An Unconventional Use for Organization Charts

Occasionally, you find a use for a Visio template that its designers might not have envisioned. The author of this book and another Visio expert did exactly that with the org chart wizard by using it to display the folder structure on a Windows computer. After all, groups of people and folders on a disk drive are both organized hierarchically, so it seemed like a logical thing to do.

**See Also** To read an article about viewing the Windows disk drive as an "organization chart," go to [www.experts-exchange.com/viewArticle.jsp?articleID=2802](http://www.experts-exchange.com/viewArticle.jsp?articleID=2802).

## Key Points

- Creating flowcharts is one of the most common uses for Visio. The built-in templates make it very easy for you to create both conventional flowcharts and swimlane diagrams.
- Swimlane diagrams, also known as cross-functional flowcharts, offer one key advantage over regular flowcharts: each process step resides in a swimlane that identifies which role, department, or function is responsible for that step.
- You can create organization charts manually by dragging shapes from the org chart stencil onto the drawing page.
- The Organization Chart Wizard automates most of the creation of org charts by letting you import data from Excel spreadsheets, text files, and databases. In addition, the wizard can provide you with a preformatted spreadsheet that you can use to enter your organization's data prior to running the wizard.

# Chapter at a Glance

Link data to shapes automatically, [page 197](#)

Refresh all or selected linked data in linked diagrams, [page 193](#)

Run a predefined report, [page 200](#)

Milest	Name	Duration	Status	Owner	Function	Start Date	End Date	Cost
Cost	Total	Decision	Conditions accepted	HR Admin	Conditions	4/4/2011		\$0.00
Cost	Total	Document	HR Policy Manual					\$0.00
Cost	Total	Process	Prepare job description and screening questions	HR Admin	HR Manager	4/4/2011		\$0.00
Cost	Total	Process	Review candidates	HR Admin	Recruiter	4/18/2011		\$0.00
Cost	Total	Process	Select candidate	HR Admin	Recruiter	4/25/2011		\$0.00
Cost	Total	Process	Make job offer	HR Admin	Recruiter	4/25/2011		\$0.00
Cost	Total	Process	HR candidate not selected	HR Admin	Recruiter	4/25/2011		\$0.00
Cost	Total	Process	Administer start job	HR Admin	HR Admin	4/4/2011		\$0.00
Cost	Total	Process	Log hiring request	HR Admin	HR Admin	4/4/2011		\$0.00
Cost	Total	Task/End	Hiring need reported					\$0.00
Cost	Total	Task/End	Start Job					\$0.00
<b>Grand Total</b>								<b>\$0.00</b>

Cost	Process Number	Owner	Function	Start Date	End Date	Status
101	101	HR Admin		4/4/2011		In Progress
102	102	Hiring Manager		4/4/2011		In Progress
103	103	HR Admin		4/6/2011		In Progress
104	104	Recruiter		4/18/2011		In Progress
105	105	Manager		4/25/2011		Not Started
106	106	Recruiter		4/29/2011		Not Started
107	107	Candidate		5/5/2011		Not Started
108	108	Recruiter		5/6/2011		Not Started

Cost	\$0.00
Process Number	101
Owner	HR Admin
Function	
Start Date	4/4/2011
End Date	
Status	In Progress

Edit shape data, [page 175](#)

Link diagrams to external data, [page 186](#)

Schedule data refresh, [page 196](#)

Create a new report, [page 205](#)

Report	Location
Custom HR Report	Visio Drawing
Flowchart	C:\Program Files (x86)\Intervu
Inventory	C:\Program Files (x86)\Micro

Modify an existing report, [page 210](#)

Label: Process Number  
 Type: Number  
 Format: [dropdown]  
 Value: 101  
 Properties:

Label	Type	Format
Cost	Currency	
Process Number	Number	
Owner	String	
Function	String	
Status	String	

Change shape data attributes, [page 179](#)

Create new shape data fields, [page 184](#)

# 6 Entering, Linking to, and Reporting on Data

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## In this chapter, you will learn how to

- ✓ Understand shape data.
  - ✓ Edit shape data.
  - ✓ View and change shape data attributes.
  - ✓ Create new shape data fields.
  - ✓ Link diagrams to external data.
  - ✓ Refresh all or selected data in linked diagrams.
  - ✓ Schedule data refresh.
  - ✓ Link data to shapes automatically.
  - ✓ Run a predefined report.
  - ✓ Create a new report.
  - ✓ Modify an existing report.
- 

One of the most significant ways you can add value to your Microsoft Visio drawings is to store relevant data in the shapes on the drawing page. Although this capability has been a part of Visio since the beginning, Visio 2010 and Visio 2007 have added a significant level of sophistication to the program's ability to import, store, manipulate, visualize, and report on critical business data.

In this chapter, you will discover ways to make your drawings even more valuable by creating data-driven diagrams. You will learn how to use, create, and edit shape data fields. You will also learn techniques for linking shapes in a Visio drawing to data stored in spreadsheets, databases, and other sources. Finally, you will learn to extract data from a Visio diagram by creating, modifying, and running reports.

**Practice Files** Before you can complete the exercises in this chapter, you need to copy the book's practice files to your computer. The practice files you'll use to complete the exercises in this chapter are in the Chapter06 practice files folder. A complete list of practice files is provided in "Using the Practice Files" at the beginning of this book.

## Understanding Shape Data

Many Visio shapes contain data fields, referred to collectively as *shape data*, that you can use to quantify and describe various properties of the shape.

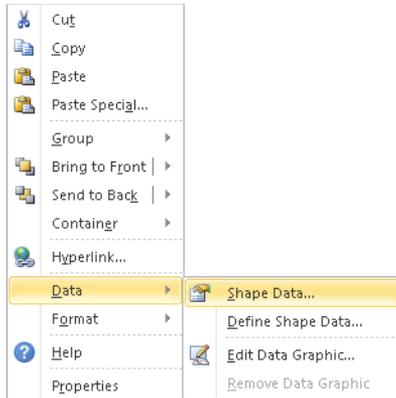
**Tip** The data fields that are called *shape data* in Visio 2010 and Visio 2007 were called *Custom Properties* in Visio 2003 and earlier.

Visio 2010 supports eight types of shape data:

- **String** Free-form text
- **Number** Any numeric data; can be restricted to integers or a specific number of decimal places
- **Fixed List** A drop-down list from which users can make a selection; users cannot add additional values to the list
- **Variable List** A drop-down list from which users can make a selection; users can add additional values to the list by typing in the text box
- **Duration** Time value expressed in one of five time units supported by Visio: seconds (es.), minutes (em.), hours (eh.), days (ed.), weeks (ew.); users enter a number followed by one of the time unit abbreviations shown
- **Date** Calendar date; users can either type a date or use a drop-down calendar to select a date
- **Currency** Currency value in currency units based on user's Region and Language settings in Windows
- **Boolean** True or False

## Viewing Shape Data

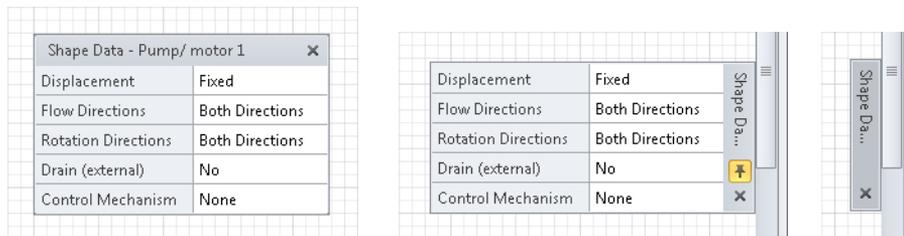
To view the shape data for any Visio object, right-click the shape, and click Data, which displays the data submenu. Then click Shape Data on the submenu.



The Shape Data window typically appears somewhere within the main Visio window, usually in whatever position it was located the last time it was opened. The following graphic shows the data associated with a pump/motor 1 shape from the Fluid Power template in the Engineering template that is provided with Visio.

You can position the floating Shape Data window (shown on the left) wherever you would like it. Note that you can also resize the window or dock it in a fixed position by dragging it to an edge of the drawing window (shown in the center).

**Tip** The pushpin button in the docked window lets you turn AutoHide on or off for the docked window. If you turn AutoHide on, the window “rolls up” into the header when you’re not using it (shown on right).



**Tip** If the Shape Data window is already open when you right-click a shape, click Data, and then click Shape Data, Visio will close it. This may not be what you expect, especially if you didn’t notice that the window was already open and can’t figure out why it didn’t appear.

If you look closely at the following two graphics, you’ll notice a subtle difference. It turns out that the Shape Data menu entry is actually a toggle that alternately shows and hides the window. In the graphic on the left, the window is closed so the icon to the left of Shape Data looks normal. However, in the one on the right, the icon is highlighted, indicating that the window is open.



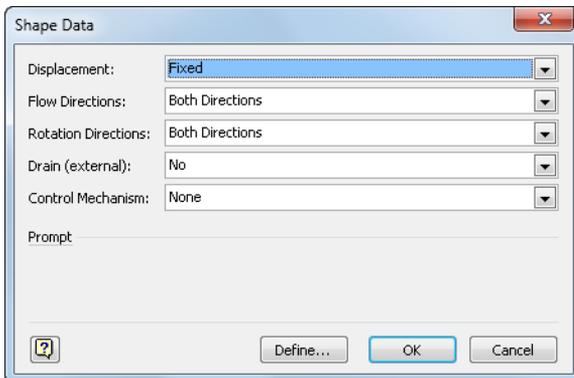
## Other Ways to View Shape Data

Because shape data is so vital to Visio diagrams, there are several additional ways to view a shape's data.

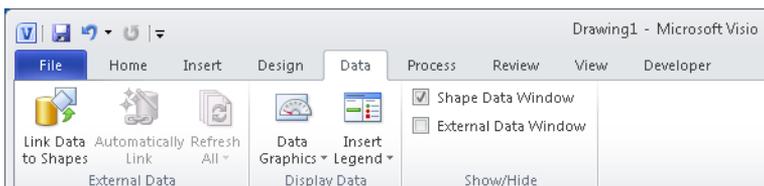
When you right-click some shapes, you can click Properties instead of Data. Although the Properties menu entry usually opens the same Shape Data window as the Data submenu technique, in some Visio templates, it opens a Shape Data dialog box instead. Although their appearance is a bit different, you can edit data in either one.

**Tip** The Properties entry is usually at the very bottom of the context menu.

For example, compare the following Shape Data dialog box for the Fluid Power pump/motor 1 with the corresponding Shape Data window, shown previously.



You can also open the Shape Data window from the Visio ribbon. On the Data tab, in the Show/Hide group, select the Shape Data Window check box.



## Editing Shape Data

After you have the Shape Data window open, you can change a shape's data. As you do so, you'll notice that some shape data fields behave differently than others. Visio enforces various rules based on the data type and formatting applied to each shape data field.

**See Also** For a list of the shape data types supported by Visio, see "Understanding Shape Data" earlier in this chapter.

As a simple example, you cannot enter text into a number or currency field. Similarly, Visio prevents you from entering anything other than a number and one of the five valid time unit abbreviations in a duration field.

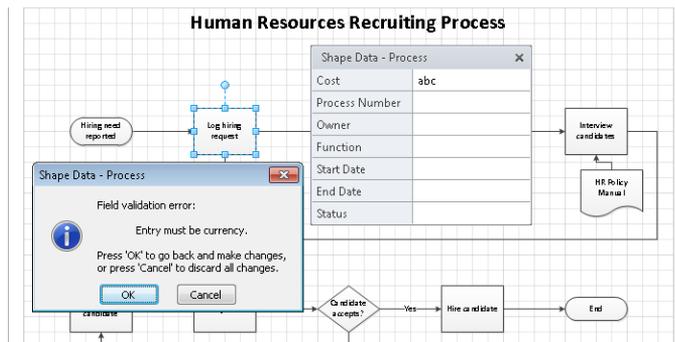
In this exercise, you will edit some of the data associated with the Human Resources Recruiting Process you worked with in Chapter 4, "Drawing the Real World: Flowcharts and Organization Charts." There are two differences between this map and the one from Chapter 4: the spacing between shapes has been expanded to open up the drawing; and additional shapes have been added to represent a database and several documents.



**SET UP** You need the *HR Process Map\_start* drawing located in the *Chapter06 practice file folder* to complete this exercise. Open the drawing in Visio and save it as *HR Process Map*. Then open the Shape Data window.

1. Click on the shape labeled **Log hiring request**. Its data appears in the Shape Data window.
2. To see an example of data validation based on field type, type **abc** into the **Cost** field, and then press either the Tab or Enter key to move to the next field.

Visio displays an error dialog box, indicating that your entry is not valid for this field because the Cost field expects a currency entry.



3. Click **OK** to close the error dialog box.
4. Type **5** and then press either the Tab or Enter key to move to the next field.

Shape Data - Process	
Cost	\$5.00
Process Number	
Owner	
Function	
Start Date	
End Date	
Status	

**Tip** Because the copy of Windows on which these graphics were made uses United States Region and Language settings, the currency amount appears in dollars. Your computer will display currency values based on your regional settings.

5. Type **101** in the **Process Number** field.
6. Press either the Tab or Enter key to move to the **Owner** field, and then type **John Smith**.
7. Click in the **Start Date** field. Notice that a browse button appears in the right end of the field.

Shape Data - Process	
Cost	\$5.00
Process Number	101
Owner	John Smith
Function	
Start Date	...
End Date	
Status	

**Tip** In a Visio date field, you can either type a date or use the calendar field browse button to select a date.

8. Click the calendar field browse button and click a date in the pop-up calendar. The calendar closes and the selected date appears in the Shape Data window.

Shape Data - Process	
Cost	\$5.00
Process Number	101
Owner	John Smith
Function	
Start Date	2/10/2012 ...
End Date	
Status	

9. Click in the **Status** field. Notice that a down-arrow appears in the right end of the field. This is an example of a Visio list field.

10. Click the arrow to reveal the predefined choices for this list.

Shape Data - Process	
Cost	\$5.00
Process Number	101
Owner	John Smith
Function	
Start Date	2/10/2011
End Date	
Status	<div style="border: 1px solid black; padding: 2px;"> <ul style="list-style-type: none"> <li>Not Started</li> <li>In Progress</li> <li>Completed</li> <li>Deferred</li> <li>Waiting on Input</li> </ul> </div>

11. Click **In Progress** in the list.

**Tip** Visio supports two types of list fields: *fixed lists* and *variable lists*. In a fixed list field, you must select an entry from the list. In a variable list field, you have the option to select one of the list entries, or you can type your own text into the field if you prefer. If you type your own text, it gets added to the bottom of the list. The Status field in the preceding graphic is an example of a variable list field, so you can either select or type an entry in the field.

You can continue to enter or edit data for this process step, or you can select a different shape and edit its data.

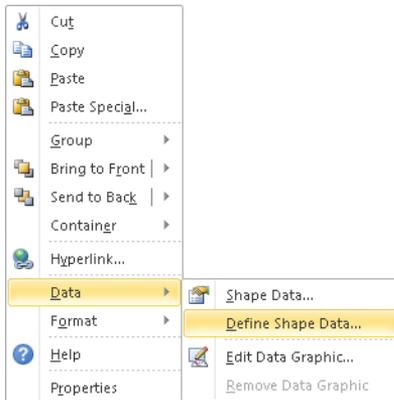
**✘ CLEAN UP** Save your changes to the *HR Process Map* drawing but leave it open if you are continuing with the next exercise.

**Tip** Though it is not advertised in any obvious way, you can edit data for more than one shape at a time. If you select multiple shapes before opening the Shape Data window, the changes you make will be applied to *all* selected shapes. This feature can be very powerful or very destructive, so it pays to be cautious.

Note that if you do select multiple shapes prior to opening the Shape Data window, you will only see the fields that all selected shapes have in common.

## Viewing Shape Data Attributes

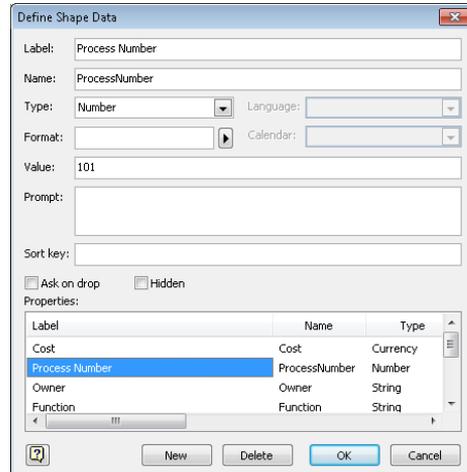
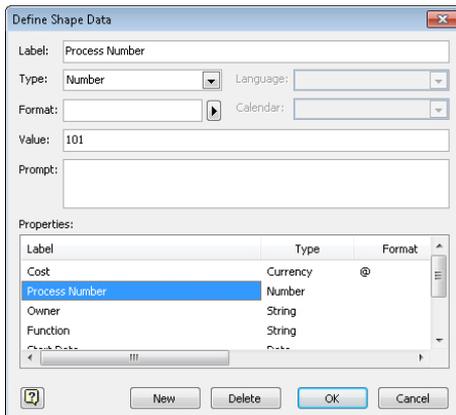
When you want to add data fields to a Visio shape, you need to open the Define Shape Data dialog box. To do so, right-click a shape, point to Data, and then click Define Shape Data.



**Tip** You can also open the Define Shape Data dialog box by right-clicking anywhere in the Shape Data window and then clicking Define Shape Data.

The Define Shape Data dialog box looks like one of the following two samples. The one on the left appears for most Visio users. The one on the right appears if you are running Visio in developer mode, and offers several additional options.

**See Also** For information about developer mode, see the Appendix.



In both variations of the dialog box, notice that each data field has multiple attributes:

- **Label** Field name
- **Type** One of the eight types described in "Understanding Shape Data" earlier in the chapter
- **Format** Determines how data entered by the user will be presented; different field types have different format options

- **Value** The data value entered when a shape was defined or entered by the user
- **Prompt** Tooltip text that appears when the user points to the shape's name in the Shape Data window

In developer mode, you will see the additional attributes described in the following list. Although some of them are primarily for use by programmers, one or two may be of value even if you are not a programmer:

- **Name** An internal name used by Visio programmers; can be the same as Label except that Name cannot contain spaces or most special characters (an underscore character is OK).
- **Sort key** Visio uses the alphanumeric value in this field to determine the sequence in which fields will be presented in the Shape Data window.

**Important** Visio treats the contents of the Sort key field as text even if you enter a number, which means that it arranges fields based on alphabetic sequence rather than numeric sequence. For example, if field A has a sort key of "1", field B has a sort key of "2", and field C has a sort key value of "10", Visio will place them in the Shape Data window in the sequence A, C, B, because the first character "1" in field C is less than the "2" in field B.

- **Add on drop** If selected, Visio opens the Shape Data dialog box whenever the user drops a shape containing this field onto a page.
- **Hidden** If selected, Visio hides this field; that is, the field does not appear in either the Shape Data window or Shape Data dialog box. Fields like this are often used by programmers to hold intermediate calculations or results that the user does not need to see.

**Tip** The shape data exercises that follow all use the regular Define Shape Data dialog box and not the developer version.

Although it is not advertised in any obvious way, you can create, edit, or delete shape data fields for more than one shape at a time. If you select multiple shapes before opening the Define Shape Data window, the changes you make will be applied to *all* selected shapes. This feature can be very powerful or very destructive, so it pays to be cautious.

## Changing Shape Data Attributes

In previous sections of this chapter, you edited shape data and learned about the attributes that comprise each shape data field. In order to appreciate just how flexible and powerful the data features of Visio really are, it's helpful to do two more things: change the attributes of several existing data fields (this exercise), and create new data fields (the following exercise).

In this exercise, you will explore and change the attributes of the data fields in one of the process shapes in the Human Resources Recruiting Process map.



**SET UP** You need the *HR Process Map* drawing for this exercise. Either continue with the open copy from the previous exercise or open the *HR Process Map\_start* drawing located in the Chapter06 practice file folder and save it as *HR Process Map*. Open the **Shape Data** window.

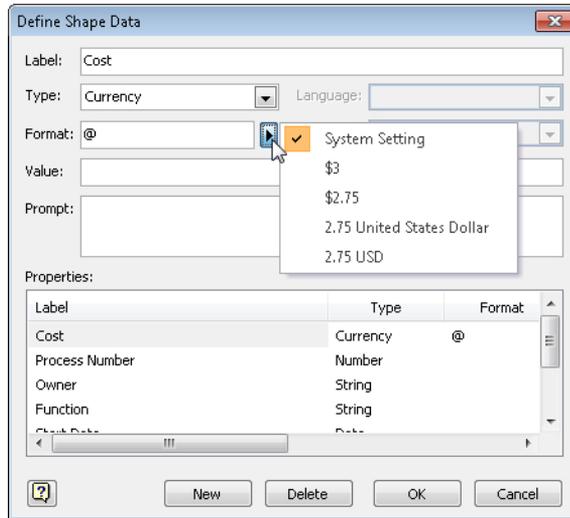
1. Click on the **Advertise open job** shape to view its shape data. Spend a moment looking at the names of the data fields for this shape.
2. Right-click in the **Shape Data** window, and then click **Define Shape Data**.

Visio displays the attributes of the first data field, *Cost*. Notice that the Label field displays *Cost*, which is the label that appears in the Shape Data window. Notice, also, that the Type field is set to *Currency*.

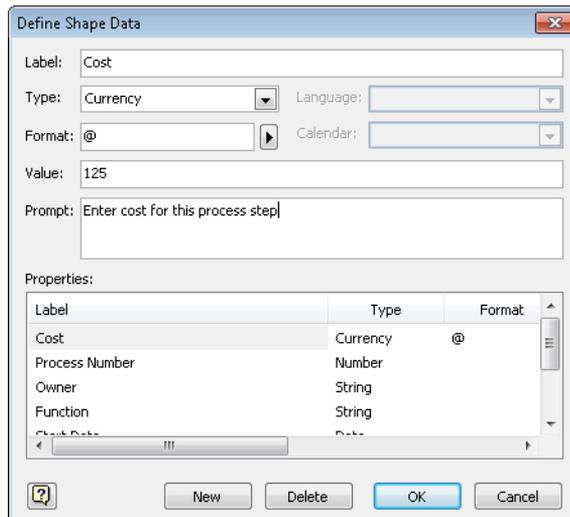
Label	Type	Format
Cost	Currency	@
Process Number	Number	
Owner	String	
Function	String	
Start Date	Date	

3. Click the right-facing arrow next to the **Format** field.

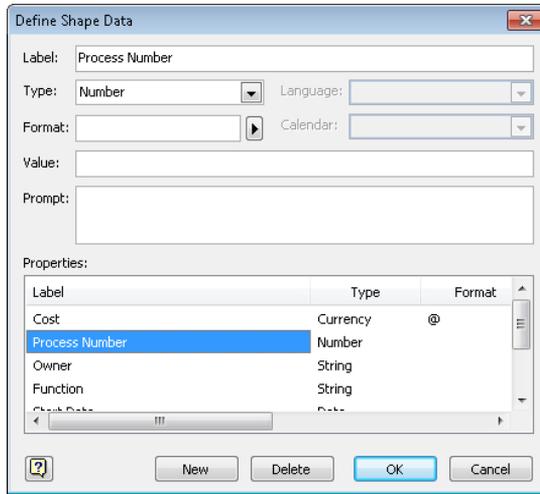
Visio provides a list of alternate formats in which the currency value can be displayed. (The list you see depends on the Region and Language settings for your copy of Windows.) It usually makes sense to leave the format set to *System Setting*, especially if your diagram will be opened in countries that use other currencies than the one you use.



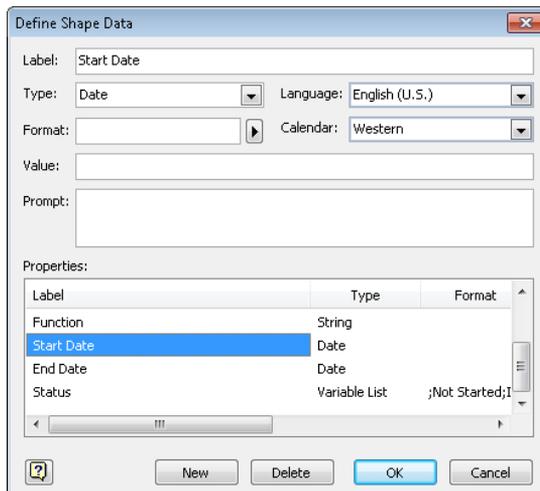
4. Click in the **Value** field and then type **125**. This value will appear as the default value for the Cost field the next time you open the Shape Data window for this shape. You can still change the value via the Shape Data window, but this provides a way for you to specify default values.
5. Type **Enter cost for this process step** into the **Prompt** field. These words will appear as a tooltip for this field later in this exercise.



6. In the **Properties** section of the dialog box, click **Process Number**. Visio displays the attributes of this field in the upper half of the dialog box. Note that this is a *Number*-type field.



7. Click the arrow next to the **Format** field to explore the various formatting options Visio provides for numeric data.
8. Click **Owner** in the **Properties** section of the dialog box. Note that the Language field is now enabled, allowing you to specify the preferred language for this text field.
9. Click the arrow next to the **Format** field to explore the various formatting options Visio provides for text data.
10. Click **Start Date** in the **Properties** section of the dialog box. Note that this field has a Date type and that the Language and Calendar attributes are now enabled. These two settings allow you to change properties that affect the presentation of the date.



11. Click the arrow next to the **Format** field to explore the various formatting options Visio provides for date fields.
12. Click **Status** in the **Properties** section of the dialog box. Note that Status is a Variable List-type field.

The Format field is used quite differently for Variable and Fixed List fields than for the other field types you've explored thus far. For list fields, Format holds a semicolon-separated list of values that will appear in the drop-down list in the Shape Data window.

In the case of the Status field, the Format field holds the following string of characters:

*;Not Started;In Progress;Completed;Deferred;Waiting on Input*

**Important** The semicolon at the very beginning of the list causes a null (blank) entry to appear at the top of the list. If you do not include a null entry, the user will not be able to leave the field blank after he or she has clicked something in the list. Both options may be appropriate in different situations: in some cases, a blank entry is not acceptable, so you want to force the user to select an entry from the list; in other cases, a blank entry is fine.

13. Type **;Waiting Manager Approval** at the end of the character string in the **Format** field.

**Important** List entries are delimited by semicolons (“;”). Be sure to type the semicolon before *Waiting Manager Approval* so that the new text becomes a separate entry in the list.

14. Type **In Progress** in the **Value** field.

**Tip** If you want a value from the list to appear as the default for this field whenever the Shape Data window is opened, type it in the Value field. Be sure that the entry you type exactly matches a list item in the Format field, including upper and lower case letters.

15. Click **OK**.

The Shape Data window reflects the changes you made to the fields: there is a default dollar amount in the Cost field and the Status is preset to *In Progress*.

Shape Data - Process.4	
Cost	\$125.00
Process Number	
Owner	
Function	
Start Date	
End Date	
Status	In Progress

16. Point to the label for the **Cost** field. *Enter cost for this process step* appears as tooltip text because you typed it in the Prompt field in Step 5 of this procedure.
17. Click in the **Status** field and then click its arrow to display the list. Note that Waiting Manager Approval appears at the end of the list.

Shape Data - Process.4	
Cost	\$125.00
Process Number	
Owner	
Function	
Start Date	
End Date	
Status	In Progress
	<ul style="list-style-type: none"> <li>Not Started</li> <li>In Progress</li> <li>Completed</li> <li>Deferred</li> <li>Waiting on Input</li> <li>Waiting Manager Approval</li> </ul>

**✘ CLEAN UP** Save your changes to the *HR Process Map* drawing, but leave it open if you are continuing with the next exercise.

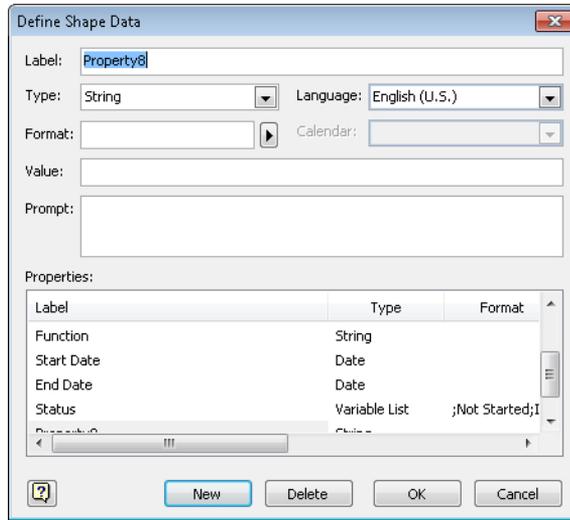
## Creating New Shape Data Fields

Now that you have successfully modified data fields for Visio shapes, you are ready to create a new shape data field.

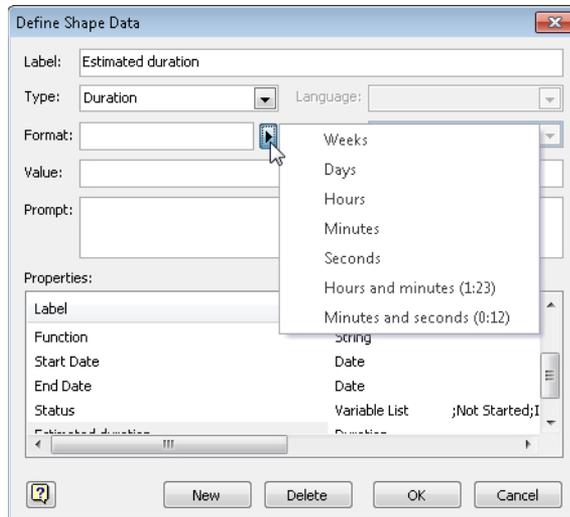
In this exercise, you will add a new field to a shape that already contains other data fields.

**➔ SET UP** You need the *HR Process Map* drawing for this exercise. Either continue with the open copy from the previous exercise or open the *HR Process Map\_start* drawing located in the Chapter06 practice file folder and save it as *HR Process Map*. Open the Shape Data window.

1. Click the **Advertise open job** shape to view its shape data.
2. Right-click anywhere in the **Shape Data** window, and then click **Define Shape Data**.
3. Click the **New** button at the bottom of the **Define Shape Data** dialog box. The focus shifts to the Label field, allowing you to type a label for this field.



4. Type **Estimated duration**.
5. Click the down arrow to the right of **Type**, and then click **Duration**.
6. Click the right arrow next to **Format**.



7. Click **Days**.

**Tip** You can set the format for a duration field to display the time in any of the standard Visio durations, ranging from seconds to weeks, or you can display the duration in one of the two listed time formats.

8. Click **OK** to close the **Define Shape Data** dialog box and return to the **Shape Data** window. Note that the field you created has been added to the bottom of the window.

Shape Data - Process.4	
Cost	\$125.00
Process Number	
Owner	
Function	
Start Date	
End Date	
Status	In Progress
Estimated duration	

**✘ CLEAN UP** Save your changes to the *HR Process Map* drawing, and then close it.

**Tip** In a similar manner that was described at the end of the section titled “Editing Shape Data” earlier in this chapter, you can add, edit, or delete data fields for more than one shape at a time. To do so, select multiple shapes before opening the Define Shape Data dialog box.

If you select multiple shapes prior to opening the Shape Data window, you will see only the fields that all selected shapes have in common.

## Linking Diagrams to External Data

**Important** The information in this section applies only to the Professional and Premium editions of Visio 2010.

Earlier in this chapter, you learned how to add and edit shape data fields. It’s convenient to be able to do so manually, but it’s also easy to imagine situations in which you would like to populate your drawings with data from a spreadsheet or database or other external source.

Prior to Visio 2007, it was possible to link Visio shapes to external data, but it was rather cryptic, somewhat confusing, and the procedures often required programming or at least some technical knowledge.

Visio 2007 Professional changed that, and both the Professional and Premium editions of Visio 2010 include the same *data linking* facility. In general, there are two steps involved in data linking:

1. Link the drawing to a data source.
2. Link the data to individual shapes.

In this exercise, you will link the process steps in the *Human Resources Process Map* drawing to data in an Excel spreadsheet.



**SET UP** You need the *HR Process Map\_start* drawing and the *HR Process Data\_start* workbook located in the Chapter06 practice file folder to complete this exercise. Open the drawing in Visio and save it as *HR Process Map with data*. Then open the *HR Process Data\_start* workbook and save it as *HR Process Data*.

1. In the Excel workbook, examine the data it contains. In particular, notice the column headings.

	A	B	C	D	E	F	G
	Cost	Process Number	Owner	Function	Start Date	End Date	Status
1		101	HR Admin		4/4/2011		In Progress
2		102	Hiring Manager		4/4/2011		In Progress
3		103	HR Admin		4/6/2011		In Progress
4		104	Recruiter		4/18/2011		In Progress
5		105	Manager		4/25/2011		Not Started
6		106	Recruiter		4/29/2011		Not Started
7		107	Candidate		5/5/2011		Not Started
8		108	Recruiter		5/6/2011		Not Started
9							
10							
11							



Data Graphics

2. In Visio, on the **Data** tab, in the **Display Data** group, click the **Data Graphics** button, and then clear the **Apply after Linking Data to Shapes** check box.

Visio will not apply a data graphic to shapes after you link them to data later in this exercise.

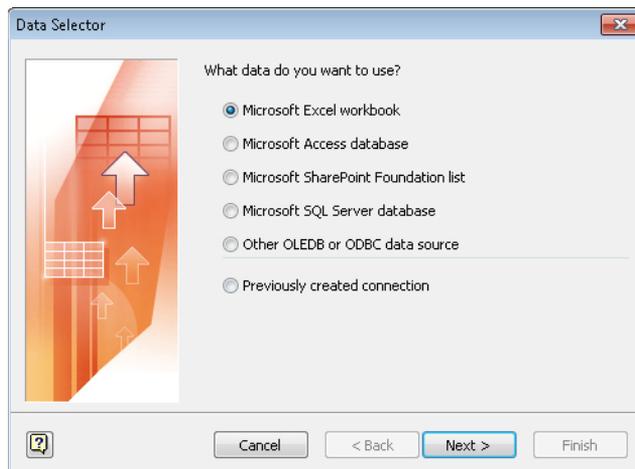
**See Also** You will learn about data graphics in Chapter 10, “Visualizing Your Data.”

**Tip** Although you are turning data graphic activation off for this exercise, in many situations, it is valuable to turn it on so you can immediately see the results of your data linking operation.

3. In Visio, on the **Data** tab, in the **External Data** group, click the **Link Data to Shapes** button. The first page of the Data Selector wizard appears.



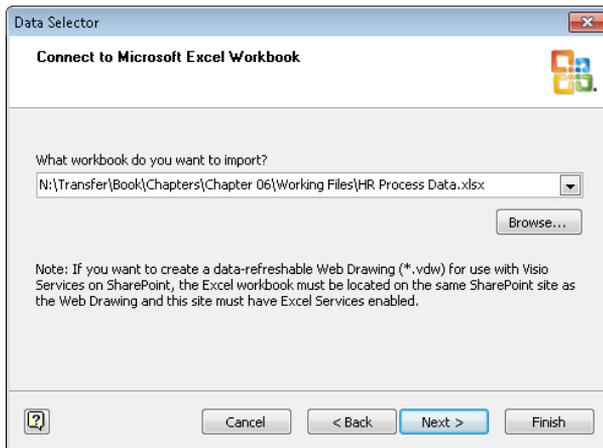
Link Data to Shapes



**Tip** The default data type on the first page of the Data Selector wizard is **Microsoft Excel Workbook**, which is the one you will use for this exercise. However, notice that you can link to data stored in **Microsoft Access**, **Microsoft SharePoint**, **Microsoft SQL Server**, or almost any other database.

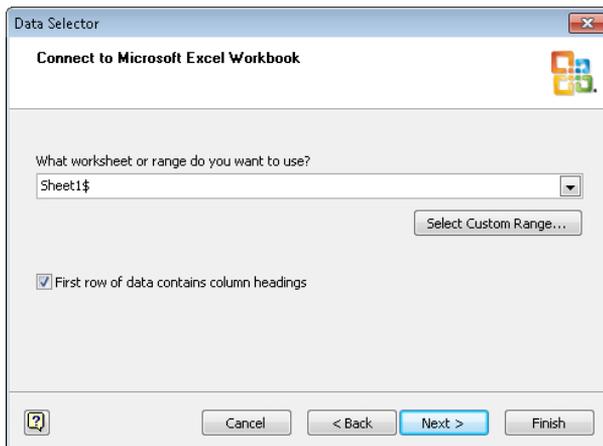
4. Click **Next**.
5. On the next **Data Selector** wizard page that appears, click the **Browse** button, and in the resulting file open dialog box, navigate to the **HR Process Data** Excel workbook. After selecting the correct file, click the **Open** button.

The file name you selected appears in the What Workbook Do You Want To Import box.



6. Click **Next**.

On this page of the wizard, you will choose which worksheet contains the data to which you want to link. The Data Selector wizard usually defaults to the first worksheet in the workbook (Sheet1\$), which is correct for this exercise.

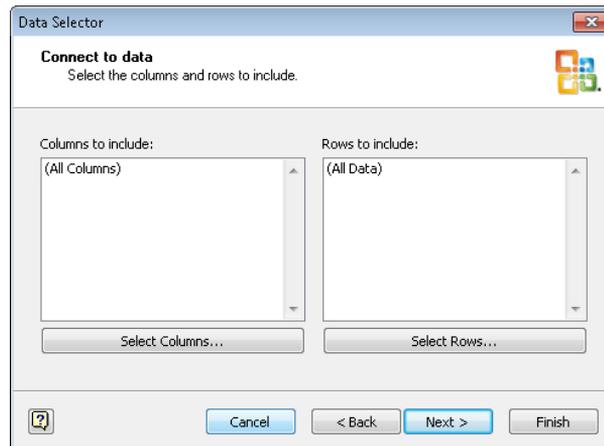


7. Select the **First row of data contains column headings** check box to indicate that the worksheet data includes column headings.

**Tip** It is very helpful if your Excel workbook contains column headings, and if they match exactly to the names of the shape data fields in Visio. If the names match, Visio will know exactly how to map the data from the data source to the shapes.

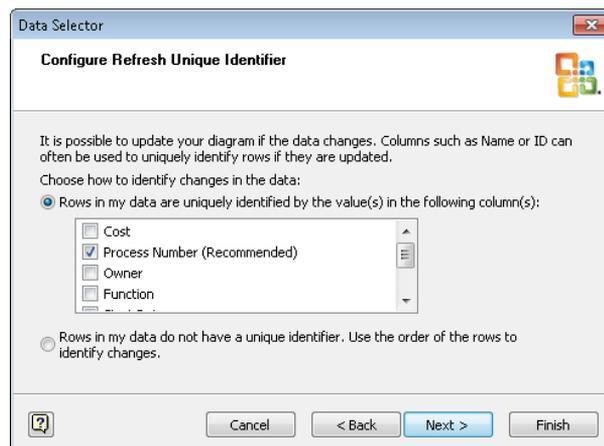
8. Click **Next** to accept the defaults for both settings on this page of the wizard.

On the Connect To Data page of the wizard you can customize the columns and rows from the selected worksheet that will be linked. As you can see in the following graphic, the default is all columns and all rows, which works for this exercise.



9. Click **Next**.

On this page, Visio recommends a field that appears to uniquely identify each row of data based on its analysis of your data. You can change to a different field if there is a better choice.

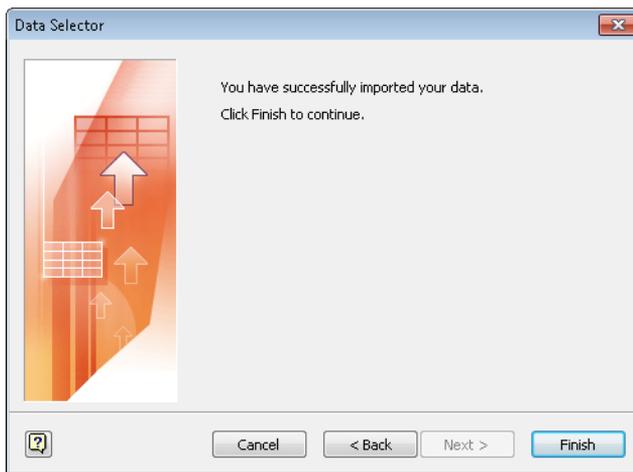


**Tip** You can select more than one field to constitute the unique ID if a single field is not sufficient.

The guesses Visio makes for the unique ID are generally pretty good. However, you should always think about the recommendation to determine whether there is a different field or combination of fields that is a better choice.

If your data does not contain a unique value for each row, you can click the option at the bottom of this page of the wizard to signify this, allowing Visio to use the sequence of the rows to identify them. Although this choice will work fine for reasonably stable data sets, be aware that using this option has potentially serious consequences later on if you reorder, add, or delete columns.

10. Click **Next** to display the final page of the wizard.



11. Click **Finish**.

Visio now displays the External Data window under the drawing pane. The External Data window contains one row for each row of data in your spreadsheet.

**Tip** In this exercise, you will link to only one Excel worksheet. However, it is possible to link a single diagram to more than one data source whether the sources are all of the same type or consist of a mix of databases, spreadsheets, and SharePoint lists.

Cost	Process Number	Owner	Function	Start Date	End Date	Status
101		HR Admin		4/4/2011		In Progress
102		Hiring Man...		4/4/2011		In Progress
103		HR Admin		4/6/2011		In Progress
104		Recruiter		4/18/2011		In Progress
105		Manager		4/29/2011		Not Started
106		Recruiter		4/29/2011		Not Started
107		Candidate		5/5/2011		Not Started
108		Recruiter		5/6/2011		Not Started

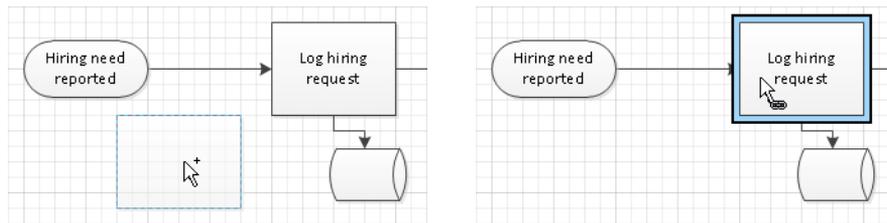
**12.** Drag data row **101** onto the **Log hiring request** process shape.

As you drag the data row, notice that the cursor appears to be dragging an outline of a shape across the page (see the following graphic on the left). Also, notice that the cursor is accompanied by a plus sign (+). This is the method Visio uses for letting you know that you are dragging the data for a specific shape type across the page.

**Tip** If you are dragging a data row onto a shape that is already on the page, as you are in this exercise, it doesn't matter whether the shape under the cursor matches the target shape. Visio will add the data to the existing shape.

In addition to dragging data rows onto existing shapes, you can create new shapes by dragging a data row onto a blank area of the drawing page. To do this, click once on the desired master in the stencil to select it, and then drag a data row onto the page. The shape under the cursor will reflect the master you've selected.

As the cursor moves onto the target shape, the plus sign is replaced by a linking symbol. In addition, the outline shapes take on a thicker, blue border (see the graphic on the right).



The end result of the drag and drop doesn't change the appearance of the shape on the page but you'll notice the addition of a linking symbol at the left end of the top data row, as shown in the following graphic.

**Tip** If you need to know which row is linked to which shape, right-click on the row, and then click **Linked Shapes** to see the answer. If you need to remove the link between a data row and a shape, right-click on the row, and then click **Unlink**.

External Data	Cost	Process Number	Owner	Function	Start Date	End Date	Status
		101	HR Admin		4/4/2011		In Progress
		102	Hiring Man...		4/4/2011		In Progress
		103	HR Admin		4/6/2011		In Progress
		104	Recruiter		4/18/2011		In Progress
		105	Manager		4/25/2011		Not Started
		106	Recruiter		4/29/2011		Not Started
		107	Candidate		5/5/2011		Not Started
		108	Recruiter		5/6/2011		Not Started

**13.** Open the **Shape Data** window for the **Log hiring request** shape.

As you can see, the data from the Excel spreadsheet now resides in the Visio shape. And even more important, potentially, is that this is a live link, as you'll see in the next section.

Shape Data - Process	
Cost	\$0.00
Process Number	101
Owner	HR Admin
Function	
Start Date	4/4/2011
End Date	
Status	In Progress

14. Drag the remainder of the data rows onto the shapes on the page. Shape 102–104 are left-to-right in the top row, and shapes 105–108 are left to right across the bottom row. (The End shape does not have a data row.)

The final result is a fully linked set of data rows.

		Cost	Process Number	Owner	Function	Start Date	End Date	Status
External Data			101	HR Admin		4/4/2011		In Progress
			102	Hiring Man...		4/4/2011		In Progress
			103	HR Admin		4/6/2011		In Progress
			104	Recruiter		4/18/2011		In Progress
			105	Manager		4/25/2011		Not Started
			106	Recruiter		4/29/2011		Not Started
			107	Candidate		5/5/2011		Not Started
			108	Recruiter		5/6/2011		Not Started

**Tip** The name on the tab at the bottom of the External Data window is the name of the worksheet in the linked Excel workbook. If you will be linking a diagram to more than one worksheet or even to worksheets in more than one workbook, it is useful to give each worksheet a unique name.

**CLEAN UP** Save your changes to the *HR Process Map with data* drawing in Visio and save your changes to the *HR Process Data* workbook in Excel. Leave both files open if you are continuing to the next exercise.

**Tip** When you populate shapes with data from the External Data window, Visio matches the external data column names with the names of the shape data fields in the target shape. If there are no matching shape data fields, Visio creates new shape data fields to accommodate the external data.

# Refreshing All Data in Linked Diagrams

**Important** The information in this section applies only to the Professional and Premium editions of Visio 2010.

After you have linked data to a Visio drawing, there is a live connection between the two files. In fact, you can make changes to the data source and have those changes appear either manually or automatically in the Visio drawing. This is true whether the drawing is linked to a single data source or to multiple sources.

In this exercise, you will update cells in the Excel data source and see those changes in the Visio shapes.



**SET UP** If they are not already opened, open the *HR Process Map with data Visio* drawing and the *HR Process Data* Excel workbook that you created in the previous exercise.

1. In the Excel spreadsheet, type **Hiring Manager** in the **Owner** cell for process number **104** that currently contains **Recruiter**.
2. Type **4/15/2011** in the **Start Date** cell for process step **104** that currently contains **4/18/2011**.
3. Type **In Progress** in the **Status** cell for process step **105** that currently contains **Not Started**.

The following graphic highlights the three changes you've just made.

	A	B	C	D	E	F	G
	Cost	Process Number	Owner	Function	Start Date	End Date	Status
1		101	HR Admin		4/4/2011		In Progress
2		102	Hiring Manager		4/4/2011		In Progress
3		103	HR Admin		4/6/2011		In Progress
4		104	Hiring Manager		4/15/2011		In Progress
5		105	Manager		4/25/2011		In Progress
6		106	Recruiter		4/29/2011		Not Started
7		107	Candidate		5/5/2011		Not Started
8		108	Recruiter		5/6/2011		Not Started
9							
10							

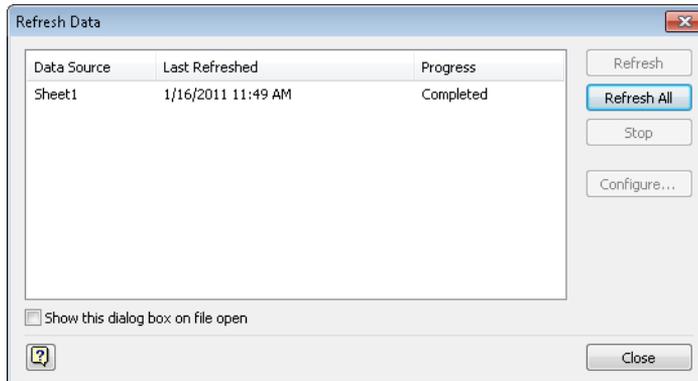


Refresh All

4. Switch to Visio. Then on the **Data** tab, in the **External Data** group, click the **Refresh All** button (do not click the arrow).

**Tip** As an alternative, you can also right-click in the **External Data** window and click **Refresh Data**.

Visio reads data from all linked data sources and shows the result in the Refresh Data dialog box.



**Tip** It is not necessary to close the spreadsheet or other data source in order to update the Visio drawing.

Occasionally, Visio may display the following dialog box. If you know that the data links in your drawing are correct and safe, click OK. You can prevent future display of this dialog box by selecting the Don't Show This Message Again check box.



5. In the **Refresh Data** dialog box, click **Close**.

Compare the data in the External Data window with the spreadsheet in Step 3 and you can see that the changes have been applied to the data in the drawing. For final proof, you should examine one of the shapes whose data you've changed.

6. Open the **Shape Data** window for the shape titled **Interview candidates**. The shape correctly reflects the new data in the Excel workbook.

Shape Data - Process.12	
Cost	\$0.00
Process Number	104
Owner	Hiring Manager
Function	
Start Date	4/15/2011
End Date	
Status	In Progress

**✘ CLEAN UP** Save changes to the *HR Process Map with data drawing* and the *HR Process Data* workbook but leave them open if you are continuing with the next exercise.

**Important** The data linking mechanism of Visio is designed for one-way data transfer, that is, for importing data *into* a Visio diagram. The opposite does not work. In other words, you can refresh the data in a drawing after making changes in a linked data source, but you cannot make changes to data in Visio and then push those changes to the linked data source.

## Refreshing Selected Data in Linked Diagrams

**Important** The information in this section applies only to the Professional and Premium editions of Visio 2010.

The procedure in the previous exercise automatically refreshes data from all linked data sources. Many times, this is exactly what you want to do. However, if your Visio diagram is linked to several data sources, there may be times when you want to update the drawing from a subset of the linked repositories.

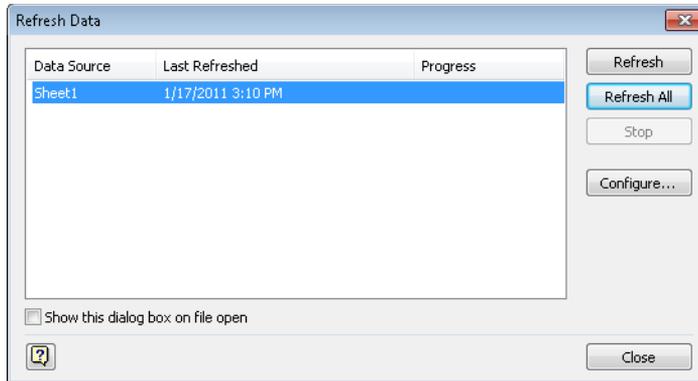
In this exercise, you will refresh data from some but not all active data sources.

**➔ SET UP** If they are not already opened, open the *HR Process Map with data Visio drawing* and the *HR Process Data* Excel workbook that you worked with in the previous exercise.



Refresh All

1. In Visio, on the **Data** tab, in the **External Data** group, click the **Refresh All** arrow (below the button), and then click **Refresh Data** to open the **Refresh Data** dialog box.



2. Select one or more data sources.

**Tip** There is only one data source in this exercise, but if you've linked a drawing to more than one, they will all be listed in this dialog box.

3. Click the **Refresh** button, and then click **Close**.

**✘ CLEAN UP** Save changes to the *HR Process Map with data Visio* drawing and the *HR Process Data* Excel workbook but leave them open if you are continuing with the next exercise.

## Scheduling Data Refresh

**Important** The information in this section applies only to the Professional and Premium editions of Visio 2010.

The preceding two exercises showed you how to manually update the data in your diagram by rereading the data sources. It's easy to imagine situations in which you would like to have Visio update the data without manual intervention. Each scenario in the following list would be a good candidate for this feature:

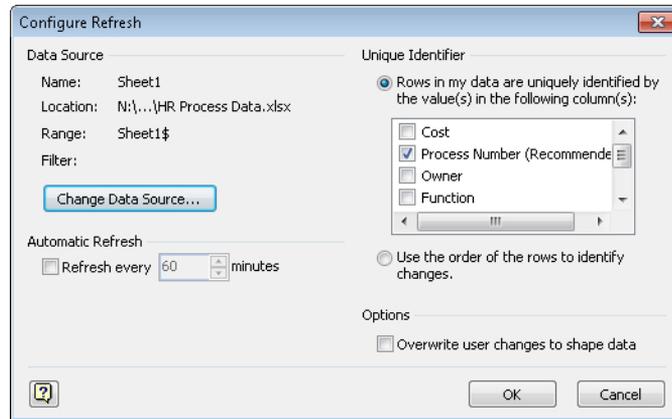
- A network or rack diagram that is used to display near real-time network and server status
- A call center seating chart that shows which agents are on the phone and which are available
- A process map that shows up-to-date task status
- A factory floor plan that displays production statistics, performance threshold warnings, and safety issues

In this exercise, you will set a schedule so Visio will refresh your drawing automatically.



**SET UP** If they are not already opened, open the *HR Process Map with data Visio* drawing and the *HR Process Data* Excel workbook that you worked with in the previous exercise.

1. In Visio, right-click anywhere in the **External Data** window, and then click **Configure Refresh** to open the **Configure Refresh** dialog box.



**Tip** As an alternative to Step 1, you can open the **Refresh Data** dialog box shown in the previous two sections, select one or more data sources, and then click the **Configure** button.

2. In the **Configure Refresh** dialog box, select the **Refresh every nnn minutes** check box.
3. Type **10** or use the spinner control to set the desired refresh interval, and then click **OK**.

From this point forward, whenever your drawing is open, the data will refresh automatically at the specified time interval. The data will not refresh when the drawing is closed.



**CLEAN UP** Save and close the *HR Process Map with data Visio* drawing and the *HR Process Data* Excel workbook.

## Linking Data to Shapes Automatically

**Important** The information in this section applies only to the Professional and Premium editions of Visio 2010.

After completing Steps 12-14 in the section titled “Linking Diagrams to External Data” earlier in this chapter, you were probably thinking “There must be a better way to link data to shapes!” Fortunately, there is. Visio includes an automatic linking facility that

works very nicely when both the data and the shapes contain matching unique identifiers. The key to the automatic linking facility is in the previous sentence: the shapes on the drawing page and the data in your spreadsheet or other data source must have matching IDs.

In this exercise, you will first prepare your drawing by adding IDs to the shapes, and then you will automatically link the data to the shapes.



**SET UP** You need the *HR Process Map\_start* drawing located in the **Chapter06** practice file folder for this exercise. Open the file in Visio.

1. Click the **Log hiring request** process shape.
2. In the **Process Number** field, type **101**.
3. Click the **Prepare job description and screening questions** process shape.
4. In the **Process Number** field, type **102**.
5. Continue assigning sequential numbers to the process and decision shapes in the flowchart, numbering from left to right in the top row and then the bottom row.
6. Save the drawing as **HR Process Map with IDs**.

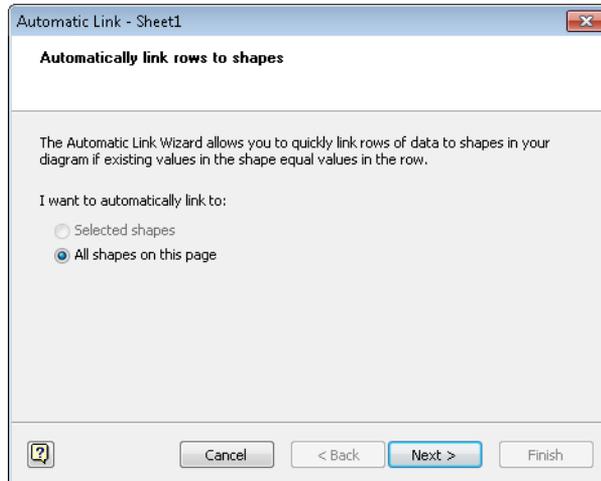
Now that you've prepared the drawing, it is easy to link data to shapes automatically.

7. Follow Steps 2–11 in the section “Linking Diagrams to External Data” earlier in this chapter. This will connect your drawing to the spreadsheet and open the External Data window.
8. On the **Data** tab, in the **External Data** group, click the **Automatically Link** button.

If you did not select specific shapes before performing this step, you will see the following page of the wizard exactly as shown. If you did select one or more shapes before performing this step, the **Selected Shapes** option will be available so that you can automatically link just those shapes.



Automatically  
Link



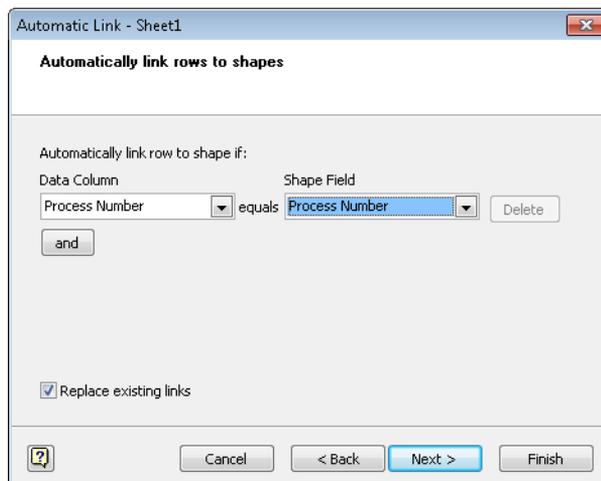
**9.** Click **Next**.

On this page of the wizard, you tell Visio how to match data with shapes by indicating the column name in the data and the field name in the shapes that are equivalent.

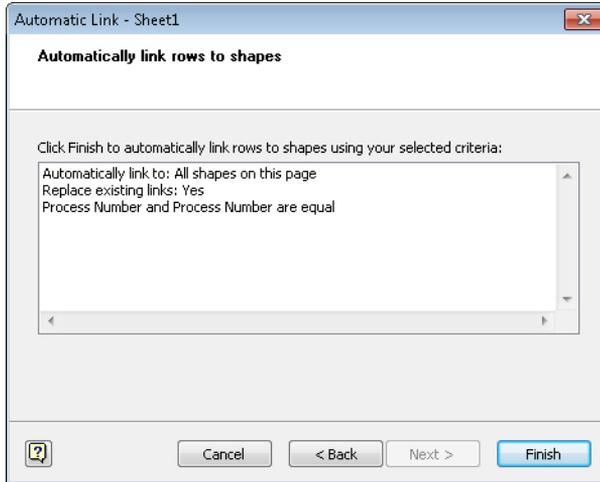
**10.** Under the **Data Column** heading, click **Process Number** in the list.

**11.** Under the **Shape Field** heading, click **Process Number** in the list.

**Tip** If you need to specify multiple conditions for matching data to shapes, click the **And** button and enter additional conditions.



12. Click **Next**. The final wizard page summarizes your choices.



13. Click **Finish**.

The data has now been linked to all matching shapes as you can see from the link symbols in the External Data window.

	Cost	Process Number	Owner	Function	Start Date	End Date	Status	
External Data		101	HR Admin		4/4/2011		In Progress	
		102	Hiring Man...		4/4/2011		In Progress	
		103	HR Admin		4/6/2011		In Progress	
		104	Recruiter		4/18/2011		In Progress	
		105	Manager		4/25/2011		Not Started	
		106	Recruiter		4/29/2011		Not Started	
		107	Candidate		5/5/2011		Not Started	
		108	Recruiter		5/6/2011		Not Started	

**✘ CLEAN UP** Save your changes to the *HR Process Map with IDs* drawing, and then close it.

## Running a Predefined Report

Now that you know how to use and modify existing data fields and how to create new fields, the next logical step is to explore ways to use all of that data.

Visio 2010 provides a reporting facility that lets you extract data in a variety of ways in order to summarize and present it. Many of the built-in Visio templates include predefined reports. You can also design your own reports by stepping through the provided report definition wizard.

In this exercise, you will run one of the built-in reports.

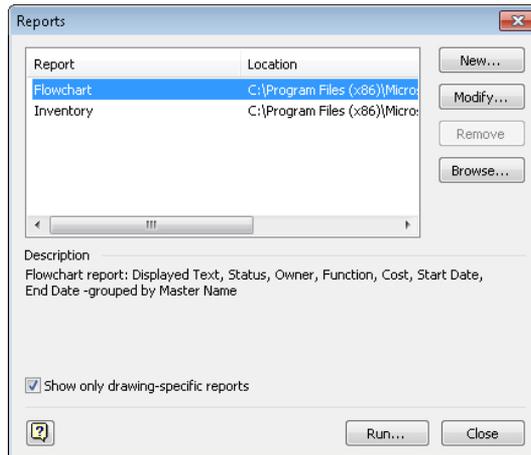


**SET UP** You need the *HR Process Map with data\_start* drawing located in the **Chapter06** practice file folder to complete this exercise. Open the drawing in Visio and save it as *HR Process Map Reports*.



Shape Reports

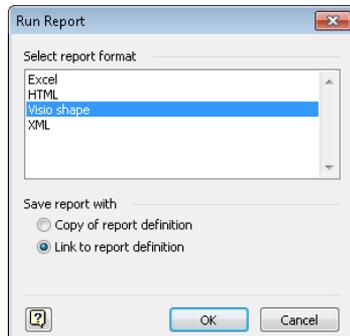
1. On the **Review** tab, in the **Reports** group, click the **Shape Reports** button. The Reports dialog box opens.
2. In the **Reports** dialog box, click once on **Flowchart** in the list of reports.



At the top of the Reports dialog box, there are two predefined reports: Flowchart and Inventory. The Flowchart report is part of the flowchart template in Visio and will appear whenever you create a diagram using that template. The Inventory report is a generic Visio report that counts shapes and is present every time you open the Reports dialog box.

Because you selected the Flowchart report, notice that there is a description of the report in the center of the dialog box.

3. Click **Run**. The Run Report dialog box opens.



The Run Report dialog box offers four different report output options:

- **Excel** Drops the formatted report data into Microsoft Excel. The report data can be edited.
  - **HTML** Drops the report into Windows Internet Explorer. This report format is read only.
  - **Visio shape** Creates a new Visio shape that contains the report data. (For the technically inclined: this shape is actually an embedded Excel object, so after creating it, you can double-click the report shape and edit the data as though you were using Excel.)
  - **XML** Creates an XML file containing the formatted report. The report data can be imported into an XML-aware application or can be edited.
4. Click **Excel**, and then click **OK** to open the Flowchart report.

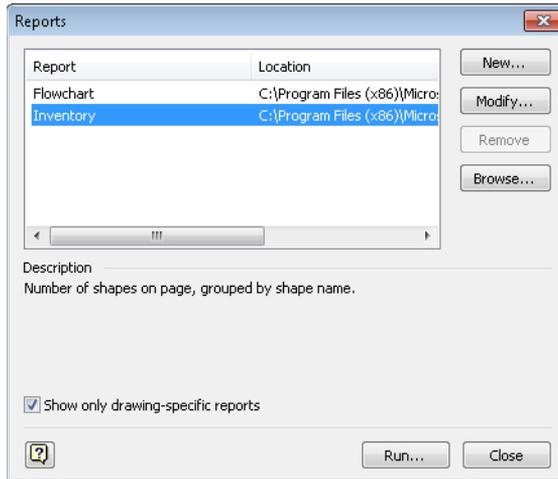
**Tip** This report includes subtotals for each entry in the Master Name column.

Flowchart Report								
	Master Name	Displayed Text	Status	Owner	Function	Start Date	End Date	Cost
	Database							
	<b>Count</b>	1						
	<b>Total</b>							
	Decision	Candidate accepts?	Not Started	Candidate		5/5/2011		\$0.00
	<b>Count</b>	1						
	<b>Total</b>							\$0.00
	Document							
	Document							
	Document	HR Policy Manual						
	<b>Count</b>	3						
	<b>Total</b>							
	Process	Prepare job description and screening questions	In Progress	Hiring Manager		4/4/2011		\$0.00
	Process	Interview candidates	In Progress	Recruiter		4/18/2011		\$0.00
	Process	Select a candidate	Not Started	Manager		4/25/2011		\$0.00
	Process	Make job offer	Not Started	Recruiter		4/29/2011		\$0.00
	Process	Hire candidate	Not Started	Recruiter		5/6/2011		\$0.00
	Process	Advertise open job	In Progress	HR Admin		4/6/2011		\$0.00
	Process	Log hiring request	In Progress	HR Admin		4/4/2011		\$0.00
	<b>Count</b>	7						
	<b>Total</b>							\$0.00
	Start/End	Hiring need reported						
	Start/End	End						
	<b>Count</b>	2						
	<b>Total</b>							
	<b>Grand Total</b>							<b>\$0.00</b>

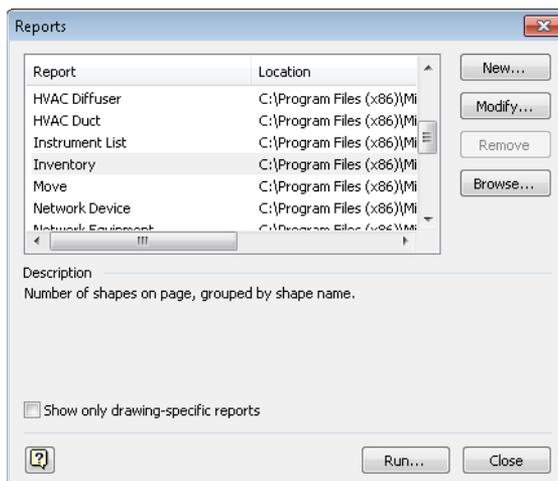
5. On the **Review** tab, in the **Reports** group, click the **Shape Reports** button. Then click **Flowchart** and the **Run** button in the **Reports** dialog box to run the Flowchart report again.
6. In the **Run Report** dialog box, click **HTML**, and then click **OK**. Internet Explorer opens and displays the report.



9. On the **Review** tab, in the **Reports** group, click **Shape Reports**.
10. In the **Reports** dialog box, click **Inventory**. Notice the description of this report—essentially, it just counts all occurrences of every shape on the page.

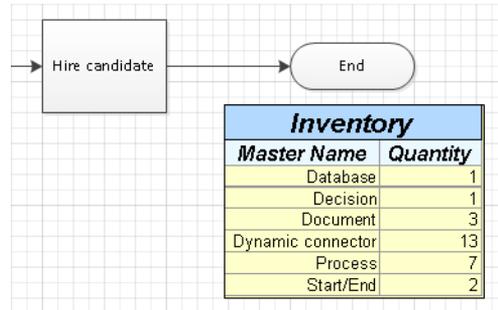


**Tip** The **Show Only Drawing-Specific Reports** option at the bottom of the dialog box is selected by default. Generally, this is a good thing because it prevents Visio from showing you a list of extraneous reports. However, if you're looking for a report that doesn't appear on the list when this option is selected, you can clear it. Doing so for the previous dialog box produces a long list of reports.



11. Click **Run**.
12. Double-click **Visio shape** in the **Run Report** dialog box to execute the report and create a new Visio shape.

In the portion of the drawing page shown in the following graphic, the inventory report displays a simple count of each shape type.



**✘ CLEAN UP** Save your changes to the *HR Process Map Reports* drawing but leave it open if you are continuing with the next exercise.

## Creating a New Report

Visio provides a Report Definition wizard so you can create new reports or modify existing reports. In this exercise, you will create a new report for the Recruiting Process.

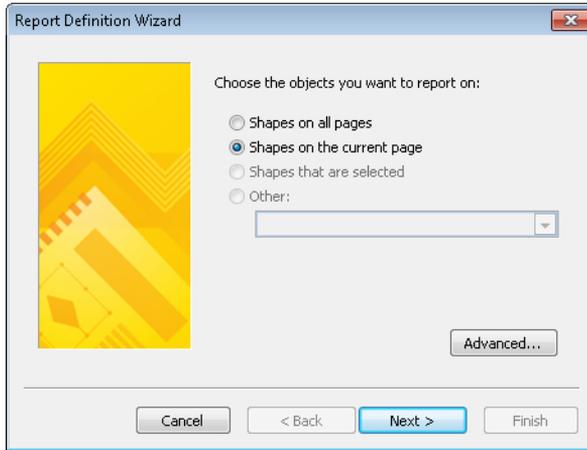
**➔ SET UP** You need the *HR Process Map Reports* drawing for this exercise. Either continue with the open copy from the previous exercise or open the *HR Process Map with data\_start* drawing located in the Chapter06 practice file folder and save it as *HR Process Map Reports*.



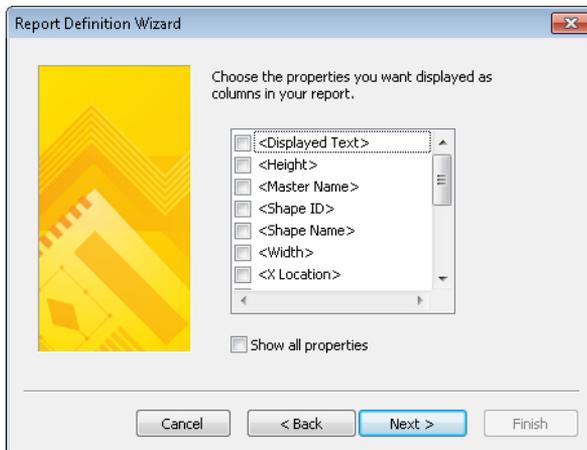
Shape Reports

1. On the **Review** tab, in the **Reports** group, click the **Shape Reports** button. The Reports dialog box opens.
2. In the **Reports** dialog box, click the **New** button. The Report Definition Wizard opens.

The Report Definition Wizard lets you select a set of shapes to include in the report.

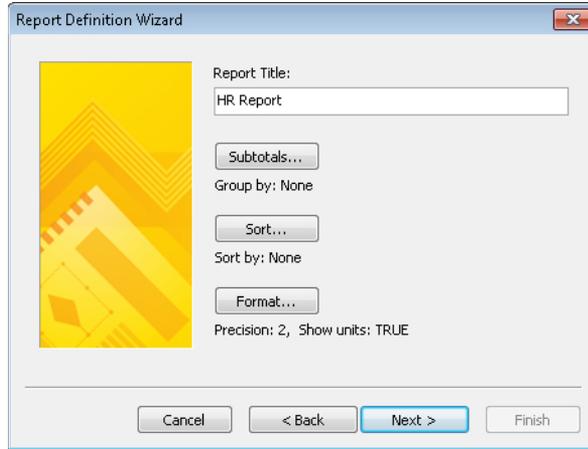


3. Click **Shapes on the current page** if it's not already selected, and then click **Next**. This page of the Report Definition Wizard shows the fields that you are most likely to want in your report. If you don't see the field you're looking for, select the Show All Properties check box.

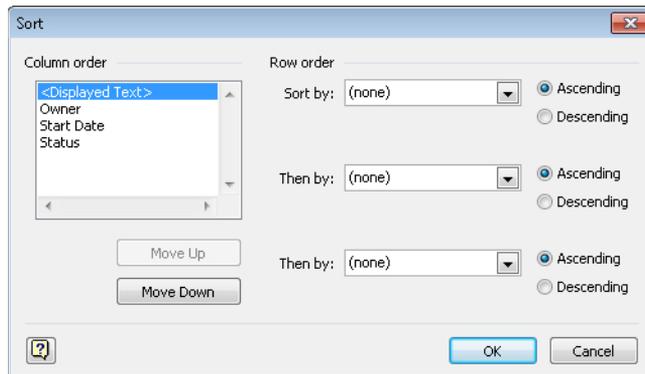


4. Select the **<Displayed Text>** check box, scroll down and select the check boxes for **Owner**, **Process Number**, **Start Date** and **Status**, and then click **Next**. The next wizard page opens.

5. Type **HR Report** in the **Report Title** text box.



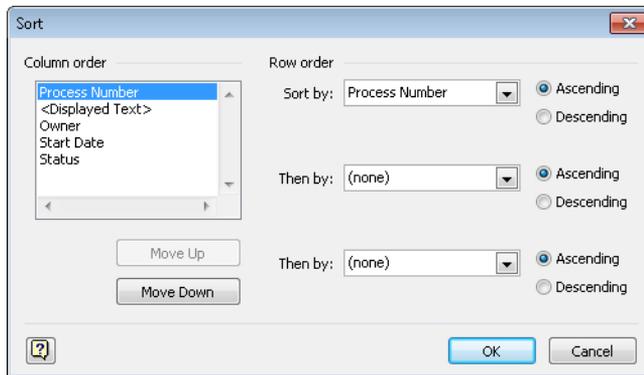
6. Click the **Sort** button so you can specify the order in which you want the data to appear in the report.



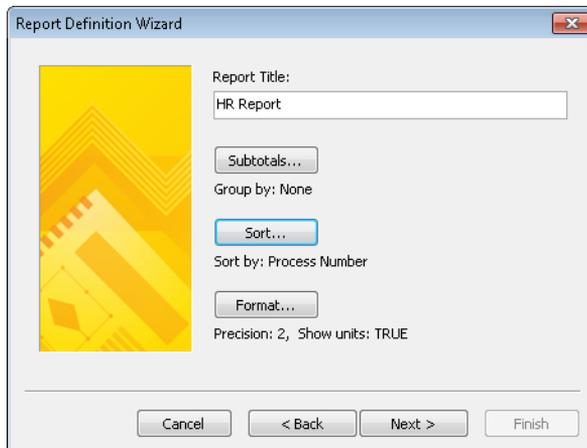
7. In the **Sort** dialog box, in the **Row Order** section, click the arrow next to **Sort by**, and then select **Process Number**.

**Tip** You can sort by as many as three fields in the Row Order section.

8. In the **Column Order** section, click once on **Process Number**, and then click the **Move Up** button twice to set the column sequence as shown in the following graphic.

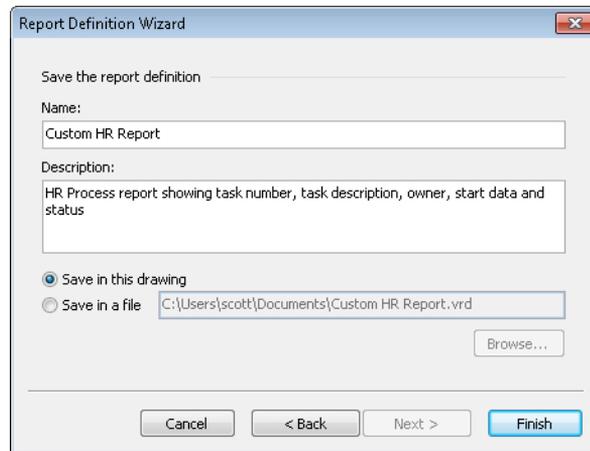


9. Click **OK** to close the **Sort** dialog box.



**Tip** The text under the **Sort** button identifies the sort field(s) you selected. Be sure to note the **Subtotals** and **Format** buttons that allow you to customize the report output in additional ways beyond what you will use for this sample report.

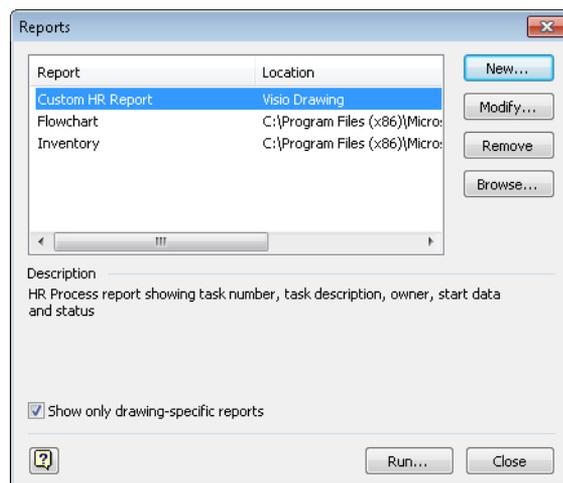
10. Click **Next** to open the final page of the **Report Definition Wizard**.
11. Type **Custom HR Report** in the **Name** text box.
12. Type **HR Process report showing task number, task description, owner, start data and status** in the **Description** text box.



You can save the report definition in the current Visio drawing, which is the default, or you can save it to an external file.

**Tip** Save the report definition to an external file if you think you'll want to use it with multiple drawings. If you do, you can retrieve the report definition by clicking the **Browse** button in the **Reports** dialog box shown in the following graphic.

13. Click **Finish**. Your report appears in the list of available reports in the **Reports** dialog box and you can run it in the usual way.



14. Click **Run** in the **Reports** dialog box.
15. Double-click **Visio shape** in the **Run Report** dialog box. Your custom report appears on the drawing page.

Report_1				
Process Number	Displayed Text	Owner	Start Date	Status
	Human Resources Recruiting Process			
	No			
	Yes			
	Hiring need reported			
	End			
	HR Policy Manual			
101	Log hiring request	HR Admin	4/4/2011	In Progress
102	Prepare job description and screening questions	Hiring Manager	4/4/2011	In Progress
103	Advertise open job	HR Admin	4/6/2011	In Progress
104	Interview candidates	Recruiter	4/18/2011	In Progress
105	Select a candidate	Manager	4/25/2011	Not Started
106	Make job offer	Recruiter	4/29/2011	Not Started
107	Candidate accepts?	Candidate	5/5/2011	Not Started
108	Hire candidate	Recruiter	5/6/2011	Not Started

When you save the changes to this file, your report definition will be saved with your drawing.

**✘ CLEAN UP** Save your changes to the *HR Process Map Reports* drawing but leave it open if you are continuing with the next exercise.

The report you’ve just created is interesting, but needs some fine tuning. For example, there are blank rows because some shapes on the page, the arrows, do not contain any data. To modify the report, continue reading in the next section.

## Modifying an Existing Report

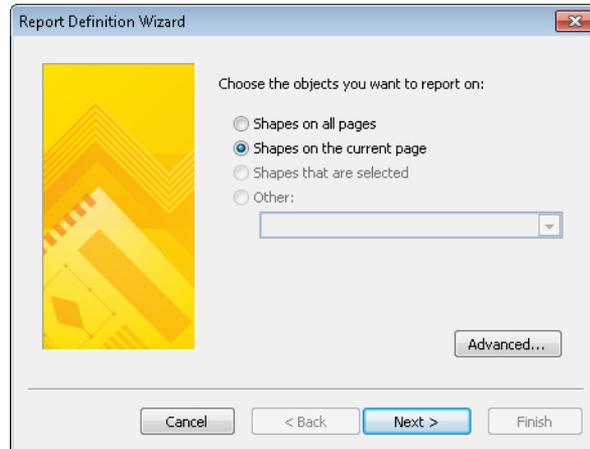
Whether you are using a predefined Visio report or one you’ve created, there are times when you want it to produce different output.

In this exercise, you will modify the HR Report you created in the previous section to eliminate the blank rows.

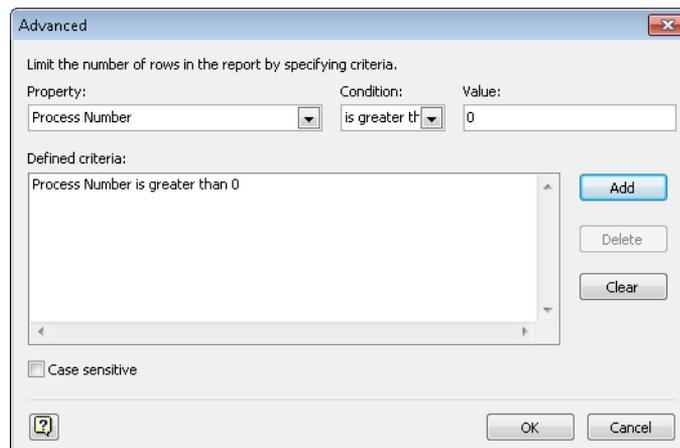
**➔ SET UP** Open the *HR Process Map Reports* drawing that you saved in the previous exercise, if it is not still open. If the HR Report is still on the drawing page, click it once to select it, and then press Delete.



1. On the **Review** tab, in the **Reports** group, click the **Shape Reports** button.
2. In the **Reports** dialog box, click **Custom HR Report** in the list of reports.
3. Click the **Modify** button. The Report Definition Wizard appears.



4. On the first page of the **Report Definition Wizard**, click the **Advanced** button. The Advanced dialog box opens.  
In the Advanced dialog box, you can limit the number of rows in the report by setting selection criteria.
5. Under the **Property** heading, click the arrow, and then click **Process Number**.
6. Under the **Condition** heading, click the arrow, and then click **is greater than**.
7. Under the **Value** heading, type **0**.
8. Click the **Add** button to add your selections to the **Defined criteria** list.



9. Click **OK**.
10. Click **Next** three times in the wizard, and then click **Finish** to save the updated report definition.
11. In the **Reports** dialog box, click **Run**.

## 12. Double-click **Visio shape**.

The modified version of the report appears without any blank rows. Compare this report to the one at the end of the preceding exercise.

Process Number	Displayed Text	Owner	Start Date	Status
101	Log hiring request	HR Admin	4/4/2011	In Progress
102	Prepare job description and screening questions	Hiring Manager	4/4/2011	In Progress
103	Advertise open job	HR Admin	4/6/2011	In Progress
104	Interview candidates	Recruiter	4/18/2011	In Progress
105	Select a candidate	Manager	4/25/2011	Not Started
106	Make job offer	Recruiter	4/29/2011	Not Started
107	Candidate accepts?	Candidate	5/5/2011	Not Started
108	Hire candidate	Recruiter	5/6/2011	Not Started

**CLEAN UP** Save and close the *HR Process Map Reports* drawing.

**Tip** It would be a good idea to experiment with the other buttons and option settings in the Report Definition Wizard while everything is fresh in your mind. There are many other ways that you can customize Visio reports.

## Key Points

- Shape data exists in, or can be added to, any shape on a Visio drawing page. A growing percentage of Visio drawings are valuable not just because they are attractive pictures, but because they are visual representations of real-world data.
- Visio diagrams do not need to exist in isolation. You can link your drawings to personal or organizational data repositories of almost any type, ranging from simple spreadsheets to SharePoint lists and almost any kind of database.
- The data in a linked Visio drawing can be updated manually or you can schedule updates to occur at a preset time interval.
- Many Visio templates include predefined reports that you can run to export summarized data to webpages, Excel files, and other formats. In addition, the Visio Report wizard steps you through editing existing reports or creating your own.

# Index

## Symbols

+ (plus sign) 191, 367  
; (semicolon) 183

## A

absolute hyperlinks 226–231  
accent colors 164  
Active Directory template 297  
active page 100, 105  
activities, defined 355  
Activities shape type (BPMN) 361  
add-ins. *See also* specific add-ins  
  about 9, 401  
  add-in tabs and 16  
  cross-functional flowchart diagrams 120  
  organizational charts 125  
add-in tabs 16  
aligning  
  background grid and 158  
  shapes 38–39, 144–148  
Align Left button 79  
Align Top button 79  
Alt key 13  
anchor shape 145  
Angle button 19  
animation, org chart add-in and 126  
Apply button 97  
Arc tool  
  about 40  
  connecting shapes with 47  
  1-D shape behavior and 51  
area select, defined 42  
Arrange group (Home tab)  
  Auto Align & Space button 148  
  Bring Forward button 144  
  depicted 10  
  Group button 89, 91, 278  
  Position button 146, 149  
  Send Backward button 144

## arrows

45 degree double arrow 100  
2-D single arrow shape 77  
viewing attributes 156

Arrows button 156

Assistant shape 128

AutoAdd feature

  about 59–62, 117  
  BPMN diagrams and 364  
  turning off 99

Auto Align & Space button 148

Auto Align & Space feature 148–149

AutoConnect feature

  about 55–59  
  activating 56, 367  
  BPMN diagrams and 364  
  troubleshooting 56  
  turning off 59

AutoDelete feature 59–62

AutoHide feature 173

automatic linking facility 197

Automatic Resize button 331

Auto Size button 99

Auto Size feature 99

## B

background grid

  about 158  
  turning off 158–160

Background group (Design tab)

  Backgrounds button 108  
  Borders & Titles button 106

background pages

  adding to drawings 255–257  
  associating with foreground pages 98  
  common usage 98  
  creating 105  
  defined 98  
  headers and footers 242  
  working with 104–109

Backgrounds button 108

Backgrounds group (Design tab) 11

background shapes 278–279

**Backstage view.** *See also specific tabs and pages*

- about 2
- displaying selection details 3
- exploring 6–9
- removing personal information 245–247
- setting hyperlink base 231
- in Visio Premium 4
- in Visio Professional 4
- in Visio Standard 2

**Basic Flowchart Shapes stencil**

- Decision shape 55, 56, 58, 60, 115
- Document shape 116
- Process shape 55, 58, 114, 118, 122, 145
- selecting 22
- Start/End shape 55, 57, 114, 118, 122
- Subprocess shape 59–62

**Basic Flowchart template**

- orientation default 114
- predefined business rules 356

**Basic Network Diagram template**

- about 272
- building basic network diagrams 272–275
- Detailed Network Diagram template and 276
- predefined reports 292

**Basic Shapes stencil**

- Circle shape 38, 75
- 45 degree double arrow 100
- Octagon shape 39, 54
- Rectangle shape 38, 53
- Square shape 39, 99
- Star 5 shape 53
- Triangle shape 40

**Blank Page arrow 105, 255****Blank Page button 98, 100****Block Diagram stencil 74****Blocks stencil**

- Box shape 73
- 2-D single arrow shape 77

**BMP file format 248****Bold button 72****bookmarks**

- creating 221
- linking to websites 219

**Boolean field 172****borders**

- applying lines styles and colors 154–157
- around containers 324, 332
- data graphics and 308
- around lists 334
- working with 104–109

**Borders & Titles button 106****Borders & Titles gallery 106****boundary shapes 333****bounding box**

- anchor shapes and 145
- containers and 326, 328
- drawing 41
- groups and 89, 326, 328
- rotating multiple shapes 75
- Shift key and 117

**Box shape 73****BPMN Basic Shapes stencil**

- about 362
- End Event shape 368
- Gateway shape 364
- Start event 361
- Start shape 364
- Task shape 364
- Text Annotation shape 365, 368

**BPMN (Business Process Modeling Notation) 361****BPMN diagrams**

- about 361–362
- additional information 362
- creating 362–366
- validating 362–366

**BPMN template**

- about 113, 356
- BPMN standard and 362
- predefined business rules 356

**Bring Forward button 144****Browse button 234****business processes.** *See work processes***Business Process Modeling Notation (BPMN) 361****buttons.** *See also specific buttons*

- about 9
- easy access to 399
- interactive guides 12
- keyboard shortcuts for 13
- resizing ribbon and 14
- in status bar 19
- switching among windows 20
- tooggling displays of 20
- tooltips for 12

**C****Cafeteria shape 91****Callout button 349****callouts**

- additional information 352
- annotating shapes with 348–352
- creating 410
- defined 322

**Callouts page 349****Callouts stencil 348**

- casino operations 303
- Center Of Rotation handle (pin) 30, 33
- Change File Type button 388
- Change Title button 381
- Check Diagram button 357, 360, 366
- Check in item shape 372
- Check out item shape 371
- Circle shape
  - aligning 38
  - orienting on page 75
- Clip Art button 93
- Clip Art task pane 93
- Clipboard group (Home tab)
  - depicted 10
  - Format Painter button 158
- Close group (Print Preview tab) 242, 244
- Close Print Preview button 242, 244
- Color gallery 166
- color picker menu/dialog box
  - previewing selections 151
  - Standard Colors section 163–166
  - Theme Colors section 163–166
- colors
  - accent 164
  - applying to drawings 150–154
  - applying to lines 154–157
  - data graphics and 314–317
  - theme 163
- Colors dialog box 151
- comments
  - adding 81–84
  - callouts and 322
  - closing 83
  - defined 81
  - navigating among 84
  - shapes and 84
  - turning indicators off/on 84
- Comments group (Review tab)
  - depicted 11
  - New Comment button 82
  - Next button 84
  - Previous button 84
- Computers And Monitors stencil
  - Laptop shape 82, 273
  - LCD Monitor shape 80
  - PC shape 81, 273, 277, 324
- Configure Refresh dialog box 197
- Connecting Objects shape type (BPMN) 361
- connecting shapes
  - with dynamic connectors 47–51
  - with lines 43–47
- connection points
  - creating flowcharts 116
  - defined 44
  - dynamic connectors and 48
  - Freeform tool and 46
  - glued lines and 46
  - Line tool and 45
  - 1-D shape behavior and 52
  - Pointer tool and 46
- Connector button
  - connecting shapes 48–50, 58
  - creating flowcharts 116
- Connector layer 97
- Connector Tool
  - connecting shapes with 48–50, 58
  - creating swimlane diagrams 123
  - description 116
  - 1-D shape behavior and 51
- Consultant shape 128
- Container button 322, 329
- containers
  - additional information 328
  - advantages of 321
  - borders around 324, 332
  - bounding box and 326, 328
  - copying and pasting 331
  - creating 409–410
  - data graphics legends and 347
  - defined 321
  - distinguishing from other items 324
  - formatting 331
  - groups and 322–328
  - lists and 321, 322, 333, 336
  - previewing styles 322
  - removing 330
  - resizing 328
  - selecting 323, 324
  - shapes and 321, 325, 328
  - sizing 331–333
  - swimlane diagrams and 125, 338–342
  - typing text in 328
  - wireframes and 342–347
  - working with content 328–331
- Container Styles group (Format tab) 331, 337
- Container Tools contextual tab set
  - about 15
  - Format contextual tab and 15, 329
  - Size group 331
- contextual tabs
  - about 15
  - callouts and 351
  - Format 15, 94, 329
  - ShapeSheet Tools Design 402

**contextual tab sets**

- Container Tools 15, 329, 331
- defined 15
- Picture Tools 15, 94

**control handles**

- defined 29
- hiding unused 274

**controls**

- page 18
- in status bar 19
- tooggling displays of 20
- tooltips for 12

**Controls stencil 346****copying and pasting**

- containers 331
- shapes 42–43

**Created in date span shape 371****Create from Selection button 367****Create New button 369****Cross-Functional Flowchart add-in**

- list and container usage 338–342
- Orientation button 121
- predefined business rules 356
- Swimlane button 121

**cross-functional flowcharts**

- about 111, 119
- creating 120–125
- list and container usage 338–342

**Ctrl+A keys 42****Ctrl key**

- following hyperlinks 65, 217
- selecting noncontiguous items 134
- selecting shapes and 41
- zooming views 26

**Ctrl+K keys 216, 286****Ctrl+Shift keys 25****Ctrl+Shift+W keys 26****Ctrl+V keys 43****Ctrl+Z keys 128****currency field 172****Current View button 244****Customize Status Bar menu 20****custom properties. See shape data fields**

# D

**Database server shape 277****data graphics**

- about 11
- activating 187
- borders around 308
- casino operations 303
- copying 317
- creating new 313–317
- dynamic display for 317
- editing 307–312
- enhancing diagrams with 300–304
- establishing default position 308
- example 64
- network diagrams 300–301
- process improvement workflows 302
- rack diagrams 300–301
- risk management 303
- turning off on shapes 305
- using existing 304–306

**Data Graphics gallery**

- Apply After Linking Data To Shapes check box 305
- editing data graphics 307–312
- opening 304, 313
- turning off data graphics on shapes 305
- using existing data graphics 304–306

**data graphics legends**

- about 347
- creating 317–319
- example 302
- modifying 319

**data linking**

- via data linking facility 186–192
- refreshing all data 193–195
- refreshing selected data 195
- to shapes automatically 197–200

**data linking facility 186–192****Data Selector Wizard 187–190****Data tab**

- about 4, 11
- components 11
- versions supporting 4, 11

**data validation 175–177****date field**

- defined 172
- entering values 176

**Decision shape**

- adding/deleting 60
- connecting 55, 56, 58
- creating flowcharts 115

**Define Shape Data dialog box**

- Add on drop field 179
- creating new fields 184–186
- Format field 178, 180, 182
- Hidden field 179
- Label field 178
- Name field 179
- opening 177, 178
- Prompt field 179, 181
- Properties section 181, 182
- Sort key field 179
- Type field 178
- Value field 179, 181, 183

**Department stencil**

- Cafeteria shape 91
- Headquarters shape 88
- International division shape 92

**Design tab**

- about 11
- components 11

**Detailed Network Diagram stencil 275–278****Detailed Network Diagram template**

- Basic Network Diagram template and 276
- building network diagrams 275–278
- predefined reports 292

**developer mode**

- accessing ShapeSheet 409
- Define Shape Data dialog box 178, 179
- Rules Tools and 376
- running in 400–401
- selection characteristics of groups 325
- shape names and 225

**Developer tab**

- adding to ribbon 225, 401
- Code group 407
- Shape Design group 402

**Diagram Parts group (Insert tab)**

- Callout button 349
- Container button 322, 329
- depicted 10

**diagrams. See drawings/diagrams****diagram validation**

- BPMN and 361–362
- BPMN diagrams 362–366
- validating flowcharts 357–361

**Diagram Validation group (Process tab)**

- Check Diagram button 357, 360, 366
- depicted 11
- Window check box 361

**dialog box launcher**

- defined 10
- legacy text formatting dialog boxes 73

**Dialog button shape 343****Dialog form shape 342, 343****Dialogs stencil**

- Dialog button shape 343
- Dialog form shape 343
- Panel shape 344
- Upper tab item shape 345

**Directory server shape 277****Disband Container button 330, 337****Display Data group (Data tab)**

- Data Graphics button 187, 304, 313, 387
- depicted 11
- Insert Legend button 318

**Display Options button 130****Distribute Shapes dialog box 149****docking windows 173****documents. See drawings/diagrams****Document shape 116****drawing canvas 99****drawing pages**

- about 17
- adding comments 81–84
- creating images of 250
- moving in drawing window 28
- printer page and 244
- resizing 20
- setting page attributes 98
- status bar and 19
- tiles on 99

**drawing scale**

- changing 289–292
- of rack shapes 282

**drawings/diagrams**

- adding background pages 255–257
- adding hyperlinks to 216
- applying color 150–154
- applying fill patterns 150–154
- applying themes to 161–162, 163–166
- copying themes between 169
- creating 5
- creating from sample diagrams 62–66
- creating with basic shapes 38–41
- data linking facility 186–192
- larger than one page 242–244
- naming conventions 6
- organizing layers in 94–97
- packaging in various formats 7
- previewing 240–244
- printing 240–244
- publishing 261–267
- publishing to Visio Services 390–397
- refreshing linked data 193–195
- removing personal information 245–247
- saved as websites 380–386
- sharing with Visio Viewer 260–261

**drawing window**

- depicted 18
- exploring 17–20
- moving drawing page in 28
- zoom techniques in 25–28

**Drawn by shape 255****duration field**

- defined 172
- setting format 185

**DWG file format 253****DXF file format 253****dynamic connectors**

- adjusting 51
- AutoConnect support 56
- connecting shapes with 47–51
- defined 47
- deleting 59, 61
- layers and 97
- in network diagrams 274
- 1-D shape behavior and 52

**dynamic glue**

- connecting shapes with 51
- defined 49
- 1-D shape behavior and 52

**Dynamic Grid button 38, 41****Dynamic Grid feature**

- activating 38
- feature limitations 52
- turning off 41
- using basic shapes 38–41

**E****ECAL (Enterprise Client Access License) 391****Edit Data Graphic dialog box**

- about 307
- Default position section 308
- displaying item parameters 309
- Edit Item button 310
- Show Border Around Items At Default Location check box 308

**editing**

- data graphics 307–312
- hyperlinks 233–234
- shape data 175–177

**Editing group (Home tab)**

- depicted 10
- Find button 294
- Layers button 95, 96
- Replace button 295
- Select button 42

**Edit Item button 310****Edit Item dialog box**

- about 309
- Details section 311
- displaying item parameters 309
- Display section 309, 310
- opening 309
- Position section 310, 311
- Use Default Position check box 309

**effects**

- custom themes and 167
- fill patterns for 154

**Effects gallery 167****Ellipse tool 40, 41****email addresses, hyperlinks to 219****EMF file format 248****End event (BPMN) 361****End Event shape (BPMN) 368****Enterprise Client Access License (ECAL) 391****error dialog box 175****Esc key 71, 242****Ethernet shape 272, 276****Event shape type (BPMN) 361****Event Type entry (BPMN) 364****Executive shape 126****Expand the Shapes window arrow 21****Export button 372****exporting SharePoint Workflow diagrams 11, 370–373****Export Workflow dialog box 372****Extensible Application Markup Language (XAML) 380, 384****External Data group (Data tab)**

- Automatically Link button 198
- depicted 11
- Link Data to Shapes button 187
- Refresh All arrow 195
- Refresh All button 193

**external data, linking automatically to shapes 197–200****external data, linking diagrams to 186–192****External Data window**

- accessing 11
- closing 63
- Configure Refresh dialog box 197
- displaying 190
- naming conventions 192
- Refresh Data option 193

**External Data Window button 63**

## F

**F2 key** 70

**F4 key** 147

**fades, fill patterns for** 154

**Fax shape**

- accessing 85
- Product Number field 87

**Field button** 86

**Field dialog box**

- Category section 87, 405
- Custom Formula category 405
- Date/Time category 405
- Field name section 87
- opening 87

**file formats**

- additional formats 7, 252–255
- graphics files 247–252

**File Locations button** 258

**File Locations dialog box** 258

**file management** 7, 399

**File server shape** 276

**File tab.** *See* Backstage view

**Fill button** 151, 331

**Fill Color list** 314

**Fill dialog box**

- about 152
- Color arrow 152
- Fill section 152
- opening 151
- Pattern list 153, 154
- Preview section 152
- reversing fill patterns 153

**fill patterns**

- applying to drawings 150–154
- difficulty displaying 152
- reversing 153
- theme effects and 161

**Fill tool** 278

**Find button** 294

**Find dialog box** 294

**Firefox browser** 263

**Fit Page To Current Window button** 20

**fixed lists**

- defined 172
- Format field and 183
- selecting entries 177

**flowchart reports** 201, 383

**flowchart rule set** 374

**flowcharts**

- adding labels to 118–119
- auto-arrange features 148–149
- common usage 111
- creating 114–117
- cross-functional 111, 119, 120, 338–342
- orientation considerations 114
- process maps and 355
- selecting types 112–114
- validating 357–361

**flowchart shapes** 97

**flowchart templates**

- Flowchart report 201
- selecting stencils 22
- support for 23, 112

**fluent user interface** 399

**folders**

- navigating to 257
- selecting on SharePoint sites 393
- Visio-generated files 386

**Font Color button** 156

**Font group (Home tab)**

- depicted 10
- Font Size arrow 72
- Font Size list 70
- legacy text formatting dialog boxes 73
- setting font size 161

**Font Size arrow** 72

**Font Size list** 70

**footers** 242

**foreground pages**

- associating with background pages 98
- defined 98

**Format contextual tab**

- activating 329
- for Container Tools 15, 329
- for Picture Tools 15
- image properties and 94

**Format Painter button** 158

**Format Painter feature** 157

**formats/formatting**

- applying line styles and colors 154–157
- containers 331
- Format Painter feature 157
- legacy dialog boxes 73
- lists 337
- supported 7
- text boxes 71–73

**45 degree double arrow** 100

**Freeform tool**

- about 40
- connecting shapes with 46, 47
- 1-D shape behavior and 51

**Free-standing Rack Equipment stencil** 285

**Full Screen button** 20

**functional bands.** *See* swimlane diagrams

# G

[Gateway shape \(BPMN\) 364](#)

[Gateways shape type \(BPMN\) 361](#)

[getting started](#)

Backstage view 2

Visio Premium 2010 4

Visio Professional 2010 4

Visio Standard 2010 2

[GIF file format 247, 385](#)

[glued lines](#)

connection points and 44–46

dynamic connectors and 47–50

dynamic glue and 49, 50, 51

identifying types of glue 51–52

static glue and 50, 51

[Goldsmith, John 141, 404](#)

[graphics files 247–252](#)

[GRAVITY\(\) function 77](#)

[grid, background 158–160](#)

[Group button 89, 91, 278](#)

[group shapes. \*See also\* specific groups](#)

bounding box and 89, 326, 328

containers and 322–328

creating and working with 88–92

default behavior for 325

layers and 97

in network diagrams 278–279

resizing 323, 328

selecting 323, 324

selecting interior shapes 328

typing text in 328

[groups in ribbon tabs](#)

dialog box launcher and 10

organization of 9, 10

resizing ribbon and 14

[guides, positioning shapes with 52–55](#)

# H

[handles](#)

control 29, 31, 274

dynamic glue and 52

hiding additional 273

resize 90, 284, 323

rotation 30, 74

selection 78

static glue and 52

unglued 52

[Header and Footer dialog box 241](#)

[headers 242](#)

[Heading Style button 331](#)

[Heading Style gallery 337](#)

[Headquarters shape 88](#)

[Height button 19, 88](#)

[Help page 8](#)

[hiding](#)

additional handles 273

org chart sections 138

Shapes window 22

unused control handles 274

windows 173

[Home tab 10](#)

[horizontal spacing 149](#)

[HTM file format 254, 386](#)

[HTML](#)

bookmark support 219

report output options 202

[hyperlink base 231–233](#)

[Hyperlink base text box 232](#)

[hyperlinks](#)

about 217

absolute 226–231

adding 216

adding multiple 234

applying to selected shapes 287

to documents 219–221

editing 233–234

to email addresses 219

example 65

to pages 224–226

relative 226–231

to specific locations within documents 221–223

to websites 218

[Hyperlinks dialog box](#)

adding multiple hyperlinks 234

Browse button 234

Description text box 233, 287

Edit Hyperlinks option 233

hyperlinking to pages 224–226

linking to documents 219–221

linking to specific location in documents 222

linking to websites 218

opening 216, 286

Relative Path For Hyperlink check box 226

Use Relative Path For Hyperlink check box 227,

229, 230

## I

**IDEF0 flowchart template** 112

**IF() function** 403

**Illustrations group (Insert tab)**

Clip Art button 93

depicted 10

Picture button 92, 105

**images**

creating graphics 247–252

enhancing org charts with 141

inserting 92–94

**importing**

pictures 92–94

rule sets 375

SharePoint Workflow 11

**Info page**

about 6

Properties button 245

Reduce File Size button 245

Remove Personal Information button 245, 246

**inserting**

pictures 92–94

shape data fields 86–88, 405–406

**Insert Legend button** 318

**Insert Page button** 19, 98

**Insert Section dialog box** 409

**Insert tab**

about 10

components 10

keyboard shortcut for 13

**Intermediate events (BPMN)** 361

**International division shape** 92

**International Standards Organization (ISO)** 2

**Internet Explorer**

publishing diagrams and 263

Visio Viewer support 260

**Inventory report** 201, 204

**ISO (International Standards Organization)** 2

**Issues window**

closing 361

Connector is not glued at both ends 358

Decision shape should have more than one  
outgoing connector 358

Flowchart does not end with a Start/End  
shape 358

Flowchart shape has no outgoing connectors and  
is not a Start/End shape 358

Flowchart shape has no text label 360

Ignore Rule 359

Ignore This Issue 359

opening 357

re-sorting list of issues 358

viewing issues 369

## J

**JavaScript** 386

**JPEG file format** 247, 249, 385

**JPG Output Options dialog box** 249

## K

**keyboard shortcuts**

about 13

closing print preview 242

following hyperlinks 217

opening Hyperlinks dialog box 216, 286

opening print preview 243

opening Save As dialog box 248

repeating previous operation 147

returning to full page view 26

selecting shapes 42

text edit mode 70

zoom technique 25–26

**Keyboard tray shape** 285

## L

**labels**

adding to flowcharts 118–119

adding to shapes 70

**Language group (Review tab)** 11

**Laptop shape**

adding comments 82

building basic network diagrams 273

**lasso select** 42

**Layer dialog box** 95

**Layer Properties dialog box**

about 96

Active check box 96

Apply button 97

Color check box 97

Glue check box 97

Layer Color setting 97

Lock check box 97

Print check box 96

Snap check box 97

Transparency setting 97

Visible check box 96

**layers**

about 94

dynamic connectors on 97

groups and 97

pages and 97

pre-assigned to stencils 97

properties supported 96

shapes and 95, 96, 97

**Layers button** 95, 96

**Layout group (Design tab)** 11

**LCD Monitor shape** 80, 285

**LDAP Directory template** 297

**Left Arrow key** 318

**Line button** 155, 156, 331

**Line dialog box**

Arrows section 156

opening 155

Preview section 156

Round corners section 155

**lines**

applying color to 154–157

connecting shapes with 43–47

determining connectedness 44–45

fill patterns for 154

**line styles**

applying 154–157

theme effects and 161

**Line tool**

about 40

connecting shapes with 43–44, 47

1-D shape behavior and 51

**Link Data to Shapes button** 187

**linking data.** *See* data linking

**linking symbol** 191

**Links group (Insert tab)** 10

**Link to Existing button** 369

**List Box control** 342

**List box shape** 346

**lists**

additional information 337

borders around 334

containers and 321, 322, 333, 336

creating 409–410

defined 321

delimiting entries 183

finding 338–348

fixed 172, 177, 183

formatting 337

shapes and 322, 333–337

sizing 337

swimlane diagrams and 125

variable 172, 177, 183

**list styles** 337

**Live Preview**

about 57

for callouts 349

in color picker dialog box 151

from Container Styles group 331

displaying container styles 322

Mini Toolbar support 57, 72

**Lock Container button** 331, 337

## M

**macros**

default security setting 407

defined 406

recording 19, 406–407

running 406–407

**Macros button** 19, 406

**Macros dialog box** 407

**Macros group (View tab)** 12

**Manager shape** 126

**Markup group (Review tab)**

depicted 11

Show Markup option 84

**masters**

defined 16

shape data fields 84

**maximizing ribbon** 15

**Maximum Number Of Undos setting** 62

**measurement units**

about 2

rack diagrams and 281

stencils and 74

templates and 2

**Membership group (Format tab)**

Disband Container button 330, 337

Heading Style gallery 337

Lock Container button 331, 337

Select Contents button 329, 337

**message flows** 362

**metric units**

Block Diagram stencil and 74

defined 2

rack diagrams and 281

**Microsoft Active Directory Topology Diagrammer** 297

**Microsoft Excel workbooks**

hyperlinks to 222, 223

report output options 202

storing 393

VBA code and 408

**Microsoft PowerPoint** 222, 223, 408

**Microsoft Silverlight** 380, 390

**Microsoft Word documents**

hyperlinks to 219–221, 221, 223

hyperlinks to locations within 221–223

**Minimize the Ribbon button** 159

**Minimize the Shapes window button** 21, 160

**minimizing**

ribbon 14

Shapes window 21

**Mini Toolbar**  
 applying line styles and color 154–157  
 Arrows button 156  
 Bold button 72  
 Fill button 151  
 Font Color button 156  
 Line button 156  
 Live Preview support 72  
 Quick Shapes 57  
 setting font size 75

**Monitor shape 285**  
**mouse wheel 26**  
**Move Down button 103**  
**Move Up button 103**

## N

**naming conventions**  
 for drawings 6  
 External Data window 192

**navigation**  
 among comments 84  
 to folders 257  
 publishing diagrams and 263, 265  
 Visio Services and 389

**Network and Peripherals stencil**  
 about 85  
 Ethernet shape 272, 276  
 Fax shape 85, 87  
 Printer shape 85, 86, 273  
 Server shape 85, 87, 273

**network diagrams**  
 basic 272–275  
 data graphics and 300–301  
 detailed 275–278  
 organizing shapes in 278–279

**New Comment button 82**  
**New Data Graphic dialog box 313**  
**New Item dialog box**  
 Color Assignments section 314  
 Display section 314  
 opening 313  
 Position section 316

**New Layer dialog box 95**  
**New page**  
 key functions 3  
 opening 2, 6, 7  
 Other Ways To Get Started section 3  
 Recently Used Templates section 3  
 returning to 5  
 starting new drawing 6–9  
 Template Categories section 3, 5, 120

**New Tab button 400**  
**Next button 84**

**Next Tile button 244**  
**No Theme button 166**  
**number field 172**

## O

**Object button 94**  
**Object Management Group/Business Process Management Initiative 362**

**Octagon shape**  
 aligning 39  
 positioning 54

**Office Layout template 406**  
**one-dimensional shapes**  
 connecting with lines 43  
 identifying 51

**Open Document dialog box 396**  
**Open in Visio button 396**  
**Open Sample Data button 62**  
**options. See Visio Options dialog box**  
**Options dialog box 130**

**organization charts**  
 about 125  
 building by hand 126–130  
 building with existing data 130–138  
 building with new data 138–140  
 creating 111  
 enhancing with pictures 141  
 hiding sections of 138  
 manipulating shapes 129  
 Windows disk drive as 141

**Organization Chart Shapes stencil**  
 Assistant shape 128  
 Consultant shape 128  
 Executive shape 126  
 Manager shape 126  
 Position shape 127  
 Vacancy shape 128

**Organization Chart template 126, 131**  
**Organization Chart Wizard**  
 controlling field positioning 134  
 data source type page 132  
 file selection page 132  
 Hyperlink Employee Shapes Across Pages check box 135  
 layout options 134, 137  
 Locate The File That Contains Your Organization Information box 132  
 New File Name box 139  
 Organization Chart template and 126, 131  
 Synchronize Employee Shapes Across Pages check box 135  
 using with existing data 130–138  
 using with new data 138–140

**Org Chart add-in**

- animation and 126
- depicted 16
- Display Options button 130
- Layout group 128
- Move buttons 138
- Organization Data group 130
- Picture group 141
- Re-Layout button 128
- Show/Hide Subordinates button 138

**orientation**

- changing defaults 121
- flowchart considerations 114
- pages 99–101, 103
- shapes on pages 73–76
- text in shapes 76–78

**Orientation button 99****Other Ways To Get Started section**

- about 3
- Sample Diagrams option 62, 302

**P****page controls 18****Page dialog box 19****page name tabs**

- about 19
- dragging to resequence pages 103

**Page Number button 19****pages**

- active 100, 105
- adding 98, 100
- background 98, 104–109, 242, 255
- changing drawing scale 289–292
- creating data graphic legends 317–319
- drawing scales of 282
- foreground 98
- headers and footers 242
- hyperlinking to 224–226
- layers and 97
- managing 98–104
- page-to-rack ratio 282
- resequencing 103
- setting up 98–104

**Page Setup dialog box**

- about 100
- creating templates 255
- Custom scale option 291
- Drawing Scale tab 282, 290
- Page Properties tab 105, 106
- Page Size tab 102, 103
- preview pane 102
- Printer paper section 102
- Print Setup tab 101, 102
- Setup button 102

**Page Setup group (Design tab)**

- Auto Size button 99
- depicted 11
- Orientation button 99
- Size button 100

**Pages group (Insert tab)**

- Blank Page arrow 105, 255
- Blank Page button 98, 100
- depicted 10

**page titles, formatting text boxes as 71–73****page-to-rack ratio 282****Page Width button 73****Pan and Zoom section (navigation pane) 265–266****Panel shape 344****Pan & Zoom button 20, 27****Pan & Zoom window 20, 27–28****Paragraph group (Home tab)**

- Align Left button 79
- Align Top button 79
- depicted 10
- displaying shape text alignment 79
- legacy text formatting dialog boxes 73

**Parker, David 375, 376, 404****Paste Special dialog box 43****pasting shapes 43****PC shape**

- adding ScreenTips 81
- building basic network diagrams 273
- building detailed network diagrams 277
- containers example 324

**PDF file format 7, 253, 254****Pencil tool**

- about 40
- connecting shapes with 47
- 1-D shape behavior and 51

**personal information, removing 245–247****Picture button 92, 105****pictures**

- enhancing org charts with 141
- inserting 92–94

**Picture Tools contextual tab set**

- about 15
- inserting images and 94

**pin (Center Of Rotation handle) 30, 33****plus sign (+) 191, 367****PNG file format 247, 251, 385****PNG Output Options dialog box 251****Pointer Tool**

- applying changes with 73
- connecting shapes with dynamic connectors 50
- connecting shapes with lines 45
- description 116
- organizing shapes 278
- orienting shape text 78
- positioning shape text 79

**Pointer Tool button** 116

**Position button** 146

**positioning**

- via Auto Align & Space feature 148–149
- background grid and 158
- data graphics 308
- fields via Organization Chart Wizard 134
- Shape Data window 173
- shapes 52–55
- shape text 78–81

**Position shape** 127

**Power supply/UPS shape** 284

**predefined reports**

- Basic Network Diagram template 292
- Detailed Network Diagram template 292
- modifying 210–212
- running 200–205

**predefined validation rule sets** 373

**predefined workflows** 370

**Preview group (Print Preview tab)**

- Current View button 244
- Header & Footer button 241
- Next Tile button 241, 244
- Previous Tile button 244
- Single Tile button 244
- Whole Page button 244

**previewing diagrams** 240–244

**Previous button** 84

**Previous Tile button** 244

**Printer shape**

- accessing 85
- Asset Number field 86
- building basic network diagrams 273
- Manufacturer field 86
- Network Name field 86
- Product Number field 86

**Print group (Print Preview tab)** 241

**printing**

- background grid and 159
- diagrams 240–244
- selecting paper size 102

**Print page**

- about 7
- displaying 240
- Print Preview option 240

**Print Preview tab** 240–244

**print preview window**

- closing 242
- opening 243

**Print server shape** 277

**print tiles** 243

**processes.** *See* work processes

**process improvement workflows** 302

**process maps** 355

**Process shape**

- adding labels to flowcharts 118
- aligning shapes 145
- connecting 55, 58
- creating flowcharts 114
- creating swimlane diagrams 122

**Process tab**

- about 5, 11, 355
- components 11
- versions supporting 5, 11

**Proofing group (Review tab)** 11

**Properties button** 245

**Properties list** 6

**Publish button** 380

**publishing drawings/diagrams**

- to Visio Services 390–397
- to websites 261–267

**Publish Settings dialog box** 392, 393

**PurchaseDate shape** 406

**pushpin button** 173

## Q

**Quick Access Toolbar**

- about 9
- customizing 399, 400
- keyboard shortcuts and 13
- Save button 396
- Undo button 128

**Quick Print button** 240

**Quick Shapes**

- creating flowcharts 114
- stencils and 57
- usage examples 55–59

**Quick Shapes stencil**

- Start shape 371
- Terminate shape 371

## R

**rack diagrams**

- adding equipment to 283–288
- creating 280–283
- data graphics and 300–301
- downloadable stencils/shapes 288
- page-to-rack ratio 282

**Rack Diagram template** 280–283

**Rack-mounted Equipment stencil**

- accessing 281
- Keyboard tray shape 285
- LCD Monitor shape 285
- Power supply/UPS shape 284
- Rack shape 283, 289
- Router 1 shape 285
- Server shape 284

**Rack Mounted Servers stencil 277****Rack shape 283, 289****recording macros 19, 406–407****Record Macro dialog box 406****Rectangle shape**

- positioning 38
- resizing 53

**Rectangle tool**

- about 40
- constraining 40
- organizing shapes 278

**Reduce File Size button**

- about 6
- accessing 245

**Refresh All arrow 195****Refresh All button 193****Refresh button 395****Refresh Data dialog box 195****refreshing linked data**

- for all data 193–195
- for selected data 195
- scheduling 196–197

**relative hyperlinks 226–231****Re-Layout button 128****Remove Hidden Information dialog box 246****Remove Personal Information button**

- about 6
- accessing 245, 246

**Reorder Pages dialog box 103****repeating previous operation 147****Replace All button 296****Replace dialog box 296****replacing text 294–296****Report Definition Wizard**

- Advanced dialog box 211
- creating new reports 205–210
- modifying reports 210–212
- opening 210
- Show All Properties check box 206
- Sort dialog box 207
- specifying data order 207

**reports**

- computer and network 292–293
- creating 205–210
- designing with report definition wizard 200
- flowchart 201, 383
- modifying 210–212
- output options 202
- predefined 200–205, 210–212, 292

**Reports dialog box**

- Flowchart report 201
- Inventory report 201, 204
- opening 201
- Report Definition Wizard 205
- Show Only Drawing-Specific Reports option 204

**Reports group (Review tab)**

- depicted 11
- Shape Reports button 201, 202–204, 205, 210

**repositioning**

- shapes 29–34
- Text Annotation shape 365
- zoom feature suggestions 80

**resequencing pages 103****resize handles**

- containers and 323
- enlarging groups 90
- sophisticated behavior 284

**resizing**

- containers 328
- drawing page 20
- groups 323, 328
- ribbon 13
- Shape Data window 173
- shapes 29–34
- Text Annotation shape 365
- text blocks 80
- text boxes 72

**Review tab 11****ribbon**

- about 1, 9
- customizing 9, 399, 400
- groups in ribbon tabs and 9, 10, 14
- interactive guides 12
- maximizing 15
- minimizing 14
- resizing 13

**risk management 303****rotating**

- shapes 30, 73–76
- shape text 76–78
- zoom feature suggestions 80

**rotation handles 30, 74**

**Roth, Chris** 404  
**Router 1 shape** 285  
**rulers**  
 drawing scale and 290  
 positioning shapes with 52–55, 74  
 turning off/on 160  
**rules**  
 creating new 375  
 diagram validation and 356  
 reusing existing 373–375  
**rule sets**  
 defined 356  
 flowchart 374  
 importing 375  
 removing from active list 375  
**Rules Tools** 375, 376  
**Run Report dialog box** 201, 205, 209

## S

**sample drawings** 62–66  
**Save As dialog box**  
 Automatically View Files In Browser check box 392  
 Change Title button 381  
 navigating to folders 257  
 opening 248  
 Publish button 380  
 Save button 388  
**Save As Web Page dialog box**  
 Advanced tab 383, 384  
 Automatically Open Web Page In Browser check box 382  
 Details (shape data) check box 382  
 Display Options section 385  
 Go to Page section 383  
 Host In Web Page setting 385  
 opening 381  
 Organize Supporting Files In A Folder check box 382  
 Output Formats section 384  
 Pages To Publish section 381  
 Page Title text box 382  
 Provide Alternate Format For Older Browsers check box 385  
 Publishing Options section 381, 382  
 Report: Flowchart check box 382  
 Search Pages check box 382  
 Style Sheet setting 385  
 Target Monitor setting 385  
**Save As Web Page function** 262, 267, 386  
**Save button** 388, 396  
**Save & Send page**  
 about 7  
 Browse for a location option 391  
 Change File Type button 388  
 file formats and 255  
 File Types section 391  
 Locations section 391  
 Save to SharePoint option 391  
**scheduling data refresh** 196–197  
**SCOM (System Center Operations Manager)** 397  
**ScreenTips**  
 adding 81–84  
 defined 81  
 deleting 81  
**SDL Diagram flowchart template** 112  
**searching text** 294–296, 390  
**Search Pages pane** 266  
**security settings, macros** 407  
**Select button (Editing group)**  
 Area Select option 42  
 Lasso Select option 42  
**Select Contents button** 329, 337  
**selection handles** 78  
**selection rectangle** 90  
**semicolon (;)** 183  
**Send Backward button** 144  
**sequence flows** 362  
**Server shape**  
 accessing 85  
 Asset Number field 85  
 building basic network diagrams 273  
 default text position 87  
 Network Name field 85  
 rack diagrams and 284  
 Serial Number field 85  
**Servers stencil** 276, 277  
**Setup button** 102  
**Shadow button** 331  
**shape data**  
 about 84–86, 172  
 changing attributes 179–184  
 computer and network reports 292  
 creating new fields 184–186  
 editing 175–177  
 inserting fields 86–88, 405–406  
 types supported 172  
 validating 175–177  
 viewing 172–174  
 viewing attributes 177–179  
 web-published drawings and 397  
**Shape Data dialog box**  
 Shape Data window and 174  
 wireframes and 344

**Shape Data window**

- accessing 11
- Define Shape Data dialog box 180
- hiding 173
- opening 395
- opening Define Shape Data dialog box 178
- positioning 173
- relocating 85
- resizing 173
- scroll bar 86
- Shape Data dialog box and 174
- viewing shape data 173
- viewing shape names 226

**Shape Design group (Developer tab) 225****Shape group (Home tab)**

- depicted 10
- Fill button 331
- Fill tool 278
- Line button 155, 331
- Shadow button 331

**Shape Name button 225****Shape Name dialog box 225****Shape Reports button 201, 202–204, 210****shapes. See also group shapes**

- adding hyperlinks to 216
- adding multiple hyperlinks to 235
- adding ScreenTips 81–84
- adding text to 70
- adding with AutoAdd 59–62
- aligning 38–39, 144–148
- altering in org charts 129
- anchor 145
- annotating with callouts 348–352
- applying hyperlinks to 287
- assigning to layers 96
- associations between 362
- background 278–279
- boundary 333
- changing order of appearance 58
- comments and 84
- connecting with dynamic connectors 47–51
- connecting with lines 43–47
- constraining movement 117, 368
- containers and 321, 325, 328
- copying and pasting 42–43
- copying data graphics and 317
- Data submenu 172
- defined 17
- deleting with AutoDelete 59–62
- downloadable 288
- dragging data rows onto 191
- identifying 51
- images as 94
- inserting fields 86–88

- keyboard shortcuts 42
- labeling 70
- layers and 95, 96, 97
- linking data automatically to 197–200
- lists and 322, 333–337
- manipulating 29–34
- organizing in network diagrams 278–279
- orienting on pages 73–76
- orienting text in 76–78
- positioning text in 78–81
- positioning with rulers/guides 52–55, 74
- Properties submenu 174
- removing links with data rows 191
- report output options 202
- repositioning 29–34
- rotating 30, 73–76
- selecting 41–42
- as sheets 225
- spacing 144–148
- transferring formatting between 157
- turning off data graphics 305
- ungrouping 91
- using with Dynamic Grid feature 38–41
- viewing dimensions in status bar 19
- wireframe 342–347

**Shape ScreenTip dialog box 82****ShapeSheet**

- about 402
- accessing 409
- lists and 333
- modifying 401–405, 409
- opening 402
- Text Transform section 77
- User-defined Cells section 410
- viewing 401–405

**ShapeSheet Tools Design contextual tab 402****Shapes window**

- about 18
- changing width 21
- Computers And Monitors stencil 80, 81
- Cross-Functional Flowchart Shapes option 22
- Department stencil 88
- Expand the Shapes window arrow 21
- hiding 22
- Minimize the Shapes window button 21
- minimizing 21
- Rack-mounted Equipment stencil 281
- returning to former size 21

**SharePoint Designer 370–373****SharePoint Server**

- rendering workflow to 370
- saving websites on 387–389
- Visio Services 389

**SharePoint Workflow Actions stencil** 371, 372

**SharePoint Workflow Conditions stencil** 371

**SharePoint Workflow diagrams**

creating 370–373

exporting 11, 370–373

importing 11

**SharePoint Workflow group (Process tab)** 372

**SharePoint Workflow template**

about 356, 370

predefined business rules 356

workflow exercise 371

**sheets**

defined 225

finding shape names 225

**Shift key**

constraining shape tools 40, 117

dragging shapes and 54, 368

selecting multiple items 134

selecting shapes and 41

**Show group (View tab)**

depicted 12

Grid check box 159

Page Breaks check box 160

Task Panes button 22, 85

**Show/Hide group (Data tab)**

depicted 11

External Data Window button 63

Shape Data Window check box 174

**Show/Hide Subordinates button** 138

**Single Tile button** 244

**Size button** 100

**Size group (Format tab)** 331, 337

**Size & Position window**

Angle cell 34

manipulating shapes 29–34

opening 19, 32, 88

panel shapes 344

Pin Pos cell 33

Width cell 32

X cell 33

Y cell 33

**sizing**

containers 331–333

lists 337

**snap-to-grid function** 159

**Sort dialog box** 207

**Spacing Options dialog box** 149

**spacing shapes** 144–148

**Square shape**

accessing 99

positioning 39

**Star 5 shape** 53

**Start custom task process shape** 372

**Start/End shape**

adding labels to flowcharts 118

connecting 55, 57

creating flowcharts 114

creating swimlane diagrams 122

**Start events (BPMN)** 361

**Start shape**

from BPMN stencil 364

from Quick Shapes stencil 371

**static glue**

example of 51

1-D shape behavior and 52

**status bar**

about 19

Customize Status Bar menu 20

displaying shape information 105

Fit Page To Current Window button 20

Full Screen button 20

Language area 19

Macros button 19

opening Size & Position window 19, 32

Page Number button 19

Pan & Zoom button 20, 27

Switch Windows button 20

Width button 272

Zoom Level button 20

Zoom slider 20

**stencils. See also specific stencils**

BPMN support 362

closing 24

defined 17

downloadable 278, 288

identifying active 22

pre-assigned layers 97

Quick Shapes section 57

shape data fields 84

in Shapes window 18

**storing**

custom templates 258

Excel workbooks 393

**string field** 172

**subprocesses**

creating 366–369

defined 366

**Subprocess group (Process tab)**

Create from Selection button 367

Create New button 369

depicted 11

Link to Existing button 369

**Subprocess shape**

adding/deleting 59–62

hyperlinking 263

**subwindows** 22

**SVG file format** 248, 384

**Swimlane button** 121

**swimlane diagrams**

- about 111, 119
- creating 120–125
- list and container usage 338–348
- process maps and 355
- selecting orientation 121

**Switch Windows button 20****System Center Operations Manager (SCOM) 397****T****tabs. *See also* specific tabs**

- add-in 16
- contextual 15
- customizing ribbon 400
- temporarily displaying when minimized 15

**TaskMap add-in 16, 303****task panes 22****Task Panes button 22, 85****tasks, defined 355****Task shape (BPMN) 364****Template Categories section (New page)**

- about 3
- edition support variations 5
- Flowchart option 120
- Maps And Floor Plans 255

**templates**

- Auto Size feature 99
- business rules and 356
- creating 255–259
- creating new documents 5
- default zoom level 102
- defined 17
- measurement units and 2
- storing 258
- thumbnails for 5
- Visio Toolbox website and 6

**Terminate shape 371****text**

- adding to shapes 70
- orienting in shapes 76–78
- positioning in shapes 78–81
- replacing 294–296
- searching 294–296, 390
- typing in containers 328
- typing in groups 328

**Text Annotation shape (BPMN) 365, 368****Text Block button 78, 79****Text Block tool**

- about 78
- orienting shape text and 78
- positioning shape text 78, 79
- resizing text blocks 80

**text boxes**

- applying changes 73
- closing 71
- creating and formatting 71–73
- resizing 72

**Text button 71****text edit mode 70****text formatting. *See* formats/formatting****Text group (Insert tab)**

- depicted 10
- Field button 86
- Object button 94
- ScreenTip button 82

**Text tool 73, 161****Text Transform section (ShapeSheet) 77****theatre box office ticketing process**

- creating 363–366
- creating subprocesses 366–369
- publishing drawings to Visio Services 391–397
- saving websites to SharePoint servers 387–389
- validating 363–366

**theme colors 163****theme effects 161****THEME() function 403****themes**

- accent colors and 164
- altering org charts via 130
- applying to diagrams 161–162, 163–166
- color considerations 163
- copying between drawings 169
- customizing 166
- defined 161
- effects for 161
- setting options 168

**Themes gallery 165, 166****Themes group (Design tab)**

- Color gallery 166
- depicted 11
- display examples 162
- Effects gallery 167
- No Theme button 166
- Themes gallery 165, 166

**thumbnails**

- Borders & Titles gallery 106
- template 5

**TIFF file format 247****tiles**

- defined 99
- print 243

**title bars, highlighted 22****Title/Date shape 136****titles, page 71–73**

**Tools group (Home tab)**

- Connector button 48–50, 58, 116
- depicted 10
- Ellipse tool 40
- Freeform tool 46
- Line tool 43, 43–44
- Pointer tool 45, 50, 278
- Pointer Tool button 71, 116
- Rectangle tool 40, 278
- Text Block button 78, 79
- Text button 71
- Text tool 161

**tooltips**

- accessing 12
- applying color themes 163
- following hyperlinks 217
- theme examples and 162

**transparency, setting 152****Triangle shape 40****Trigger/Result entry (BPMN) 364****troubleshooting**

- AutoConnect feature 56
- Issues window and 357–361, 369

**Trust Center 9, 407****two-dimensional shapes**

- connecting with lines 43
- static glue and 52

## U

**UI shapes 342****Undo feature 62, 128****ungrouping shapes 91****unique ID 190****Upper tab item shape 345****user interface, customizing 399****US units**

- Block Diagram stencil and 74
- defined 2
- rack diagrams and 281

## V

**Vacancy shape 128****validation**

- BPMN and 361–362, 362–366
- data 175–177
- diagram 357–361

**validation rules**

- creating new 375
- reusing existing 373–375
- understanding 356

**variable lists**

- defined 172
- Format field and 183
- selecting entries 177

**VBA (Visual Basic for Applications) 408****VBE (Visual Basic Editor) 408****VDW file format 254, 389****VDX file format 252****vertical spacing 149****Views group (View tab) 12****View tab**

- about 12
- components 12
- contextual tab sets and 15

**Visio development team blog 328, 352****Visio engine 401****Visio Extras group 348****Visio Guy website 277****“Visio Insights” blog 59****Visio Options dialog box**

- about 8–9
- Add-ins category 9
- Advanced category 9
- Customize Ribbon category 9, 400
- Delete Connectors When Deleting Shapes check box 61
- Editing Options section 26
- Enable AutoConnect check box 59
- File Locations button 258
- General category 9
- Language category 9
- macro security settings 407
- Maximum Number Of Undos setting 62
- New Tab button 400
- Proofing category 9
- Quick Access Toolbar 9, 400
- Save category 9
- Select Shapes Partially Within Area option 42
- Trust Center 9

**Visio Premium edition**

- Backstage view 4
- flowchart templates 113
- getting started 4
- process-related features 355

**Visio Professional edition**

- Backstage view 4
- flowchart templates 112
- getting started 4

**Visio Services**

- about 379, 389
- additional information 390
- publishing drawings to 390–397

**Visio Standard edition**

- Backstage view 2
- flowchart templates 112
- getting started 2

**Visio Toolbox** 6, 272**Visio Viewer** 260–261**Visual Aids group (View tab)**

- AutoConnect button 56, 367
- depicted 12
- Dynamic Grid button 38, 41

**Visual Basic Editor (VBE)** 408**Visual Basic for Applications (VBA)** 408**VML file format** 384**VSD file format** 252, 253**VSS file format** 252, 253**VST file format** 252, 253**VSX file format** 253**VTX file format** 253**VWI file format** 373**W****Web server shape** 277**websites**

- customizing diagrams saved as 380–386
- hyperlinks to 218
- publishing diagrams 261–267
- saving in SharePoint servers 387–389

**Whole Page button** 244**Width button** 19, 88, 272**Window buttons** 12**windows.** *See also* specific windows

- docking 173
- hiding 173
- managing 399
- switching among 20

**Windows Task Bar** 218**wireframe shapes** 342–347**Wireframe template** 343–347**WMF file format** 248**Work Flow Objects stencil** 24**workflows, defined** 370**work processes**

- business rules and 356
- creating BPMN diagrams 362–366
- creating SharePoint Workflow diagrams 370–373
- creating subprocesses 366–369
- creating validation rules 375
- defined 355
- diagramming 355
- exporting SharePoint Workflow diagrams 370–373
- reusing validation rules 373–375
- templates supporting 356
- understanding BPMN 361–362
- validating BPMN diagrams 362–366
- validating flowcharts 357–361

**workspace, defined** 17**X****XAML (Extensible Application Markup Language)** 380, 384**X-axis positioning** 144**XML files** 202, 386**XPS file format** 8, 253, 255**Y****Y-axis positioning** 144**Z****Z-axis positioning** 144**Zoom buttons** 12**Zoom dialog box** 20**zoom feature**

- changing settings 394
- keyboard shortcuts 25–26
- Page Setup dialog box 102
- repositioning and rotating text 80
- returning to full page view 26
- Visio Viewer 260

**Zoom group (View tab)** 73**Zoom Level button** 20, 99, 225**Zoom slider** 20, 54**Zoom To Fit Page To View button** 394**Z-order**

- defined 144
- overriding 146

# About the Author

**Scott A. Helmers** is a Microsoft Most Valuable Professional (MVP) for Microsoft Visio and is the primary Visio expert at Experts-Exchange.com. He has helped companies create custom Visio add-ins to enhance organizational efficiency and employee productivity, and has taught thousands of people how to use technology more effectively.

He is Vice President of Product Planning and Support at the Harvard Computing Group (HCG), a software and consulting firm that assists organizations with understanding relevant technologies and making decisions about business applications and processes. Scott is a co-inventor of TaskMap ([www.taskmap.com](http://www.taskmap.com)), a Visio add-in that allows anyone to document all of the important aspects of any business process.

Scott has worked with clients in Afghanistan, Egypt, India, Ireland, Jordan, Malaysia, Saudi Arabia, Singapore, Canada, and the United States on projects involving knowledge management, specification of new IT systems, process mapping and redesign, and technology training. He is the author of *Data Communications: A Beginner's Guide to Concepts and Technology* (Prentice-Hall) and has been an Adjunct Professor at both Northeastern and Boston Universities.

When not working or spending time with his family in Andover, Massachusetts, Scott can usually be found on his bicycle or working with a local community theater company.

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