

## Communicating Visually with Visio

Gini Courter and Annette Marquis, TRIAD Consulting

Session #420 Tuesday, July 19, 2005 3:30 pm to 4:30 pm

---

Nothing communicates more clearly than a well-designed diagram or drawing. Microsoft Visio is a powerful tool for creating business and technical diagrams. With Visio, you can illustrate everything from ideas and processes to systems and project schedules. This session will introduce you to the Visio environment and show you how to create spectacular diagrams and drawings using Visio's built-in stencils and templates.

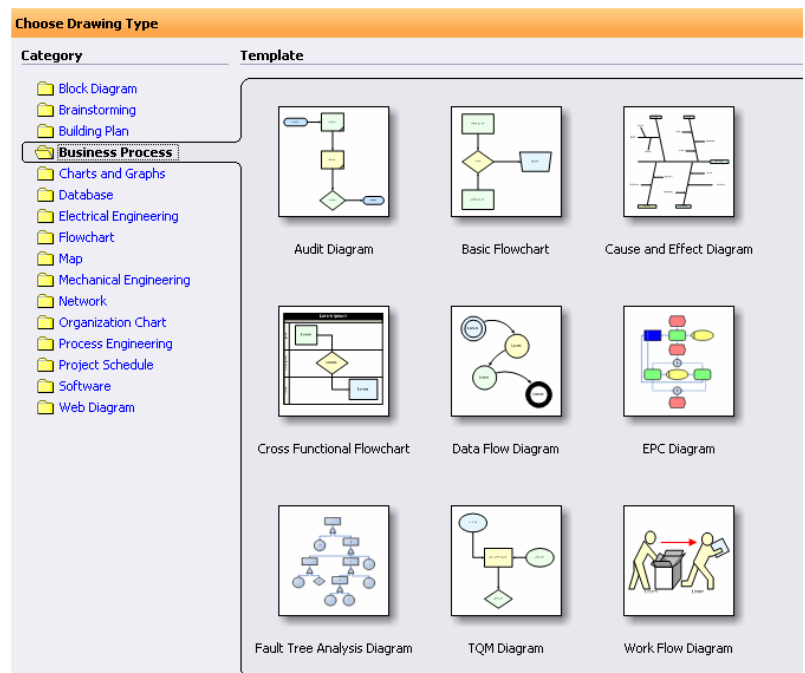
### What Visio can do for you

With the flood of information that people are expected to absorb in today's business environment, a good admin has to always be on the lookout for new and creative ways to communicate information. Text-based documents have their place, but anytime you can illustrate a key concept, structure, or process you have greatly improved the likelihood that people will integrate the information you are trying to communicate. Microsoft Visio comes with templates for almost every type of business drawing you can imagine, from basic flowcharts and workflow diagrams to Gantt charts and Web site maps.

The Choose Drawing Type dialog box, which displays when you start Visio (or click File ➤ New ➤ Choose Drawing Type), lists the categories of available templates and displays the templates in the Business Process category. Click a different category to see additional templates. If you still can't find the exact template you are looking for, Microsoft Office Online has at least a hundred more templates for you to start with. And, if none of these templates fill the bill, you can even mix and match shapes and design your own unique drawings.

In addition to printing, Visio drawings can be embedded in or linked to PowerPoint presentations, Word documents and Excel workbooks, or saved as Web pages and posted to your organization's intranet.

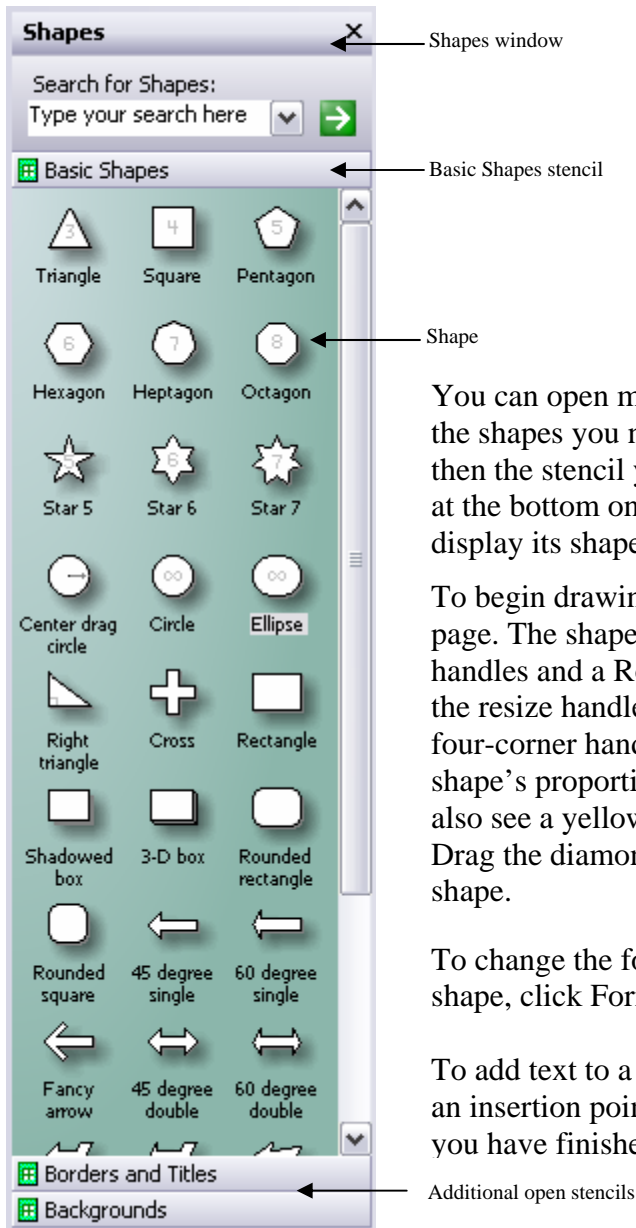
With all these options, you can create and distribute drawings to accompany almost any document you work on.



## Getting Started with Visio

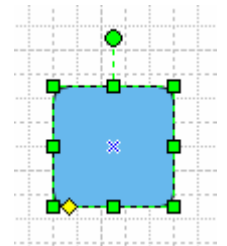
After you've decided what kind of drawing you want to create and selected the appropriate template, Visio displays:

- a Shapes window on the left of the Visio window
- a stencil, which contains the shapes for the template you've chosen
- a blank page with a grid for you to design your drawing



You can open multiple stencils at one time so you have access to all the shapes you need. Click File > Shapes and select the category and then the stencil you want to open. The newly opened stencils display at the bottom on the Shapes window. Click the stencil's title to display its shapes.

To begin drawing, drag a shape from the stencil to the page. The shape appears on the page with nine resize handles and a Rotate Shape handle. Drag any one of the resize handles to resize the shape—use one of the four-corner handles if you want to maintain the shape's proportions. On rectangular shapes, you might also see a yellow diamond in the bottom left corner. Drag the diamond to adjust the corner rounding of the shape.



To change the font, lines or fill color of the shape, right-click the shape, click Format, and then click the appropriate menu option.

To add text to a shape, double-click the shape. A white text box with an insertion point appears. Enter and format the desired text. When you have finished, click off the shape to switch out of edit mode.

### Setting Shape Defaults

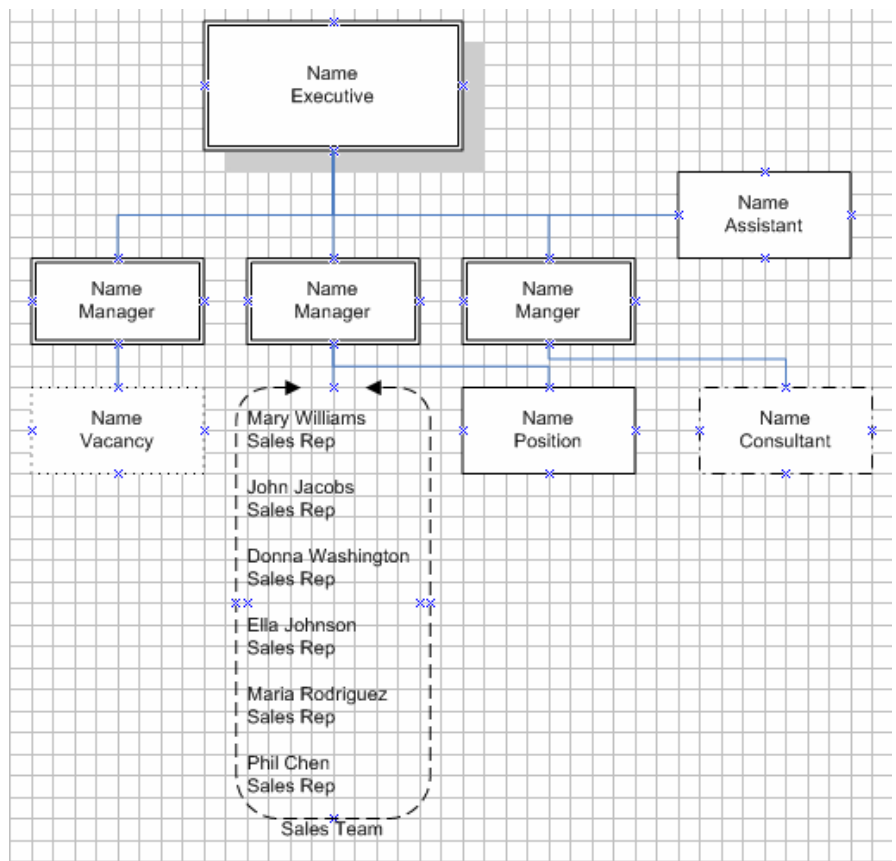
To set defaults for shapes you draw with the Drawing Tools (click the Drawing Tools button on the Standard toolbar), make sure no shape is selected and then, click Text, Line, Fill, Shadow, and Corner Rounding on the Format menu.

## Creating an Organization Chart with Visio

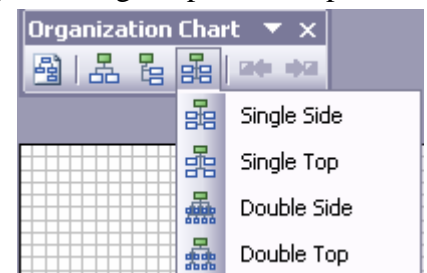
Maintaining organizational charts is one of the primary tasks of many admins. Visio offers several options for creating, maintaining and publishing organizational charts. To start, you can create a chart using the organization chart template or the organization chart wizard.

### Using the Organization Chart Template

If you click Organization Chart, Visio opens the Organization Chart Shapes stencil. From there, you can drag shapes for executives, managers, general positions, consultants, vacancies, and assistants onto the page. By dropping one shape on top of another, Visio automatically connects the two shapes and places the subordinate shape in the proper position. The sample chart shown here demonstrates the different types of positions and shapes you can create using the template.



With the Organization Chart toolbar, you can change the direction of the shapes so that they fit better on the page. By selecting a top-level shape and clicking the appropriate button on the toolbar, you can align the shapes vertically, horizontally or side-by-side in several different configurations. For



example, to change how shapes are aligned to a side-by-side alignment, click the top-level shape and then click the Side by Side button to select a configuration from the Side By Side menu. If shapes are too crowded, drag the top-level shape to a new position—all the shapes below it and connected to it, move with the top-level shape.

## Displaying sub-organizations on linked pages

In many businesses, organizational charts do not fit on one page. As a result, you end up with a hodge-podge of organizational charts that are disconnected and hard to follow. With Visio you can create linked subpages that show detailed organizations under different managers or executives. To do this, right-click a manager or executive shape and click Create Synchronized Copy. In the dialog box that opens, you can choose to hide subordinates on the original page. With this option, subordinates appear on a separate page and are linked to the shape on the original page. You can name the tabs to designate what part of the organization appears on each tab. Subordinates can be expanded on the original page at any time by right-clicking the manager or executive shape, and then clicking Expand Subordinates.

## Creating an organization chart with Excel data

If you already have a list of employees in an Excel worksheet, a Microsoft Exchange Server directory, or an ODBC-compliant data source, or if you would prefer to manage your data in Excel, it takes very little effort to have Visio create an organization chart for you automatically. To create a chart based on Excel, click File ➤ New ➤ Organization Chart ➤ Organization Chart Wizard. Excel walks you through the process of selecting an existing Excel worksheet or creating a new one. If you are using an Existing sheet, modify the sheet so that the first two columns are Name and Reports\_to. Any other data you include in the worksheet is up to you, but you must have each person's name and who they report to for the wizard to do its job.

As you walk through the wizard, you can identify which fields you want to display in the organization chart. You can also choose additional fields you'd like to have available through custom properties. In other words, the information is part of the chart but you have to right-click a shape and click Properties to see it. Finally, the wizard can automatically create additional synchronized pages to display subordinates in each department if you choose to do so. You can still manipulate the shapes after you get them into the chart, but Visio has done the hard part, creating the shapes in the first place.

## Publishing a Visio chart to the Web

One of the most common questions that comes up about Visio charts is how to publish a chart so people who don't have Visio can see it. Visio's Save As Web Page feature creates a fully navigable chart, with page tabs, hyperlinks, built-in search, and details display that can be published to your corporate intranet, SharePoint portal or Windows SharePoint Services team site. Click File ➤ Save as Web Page to create the page and publish it to a Web site.

Although an organization chart is only one type of chart you can create in Visio, you can see from this review the flexibility and the power that this drawing tool can bring to your reports, presentations, and projects.

For materials and links from this session, visit our web site  
[www.triadconsulting.com/events/iaap.htm](http://www.triadconsulting.com/events/iaap.htm)



© 2005 TRIAD Consulting, LLC. All rights