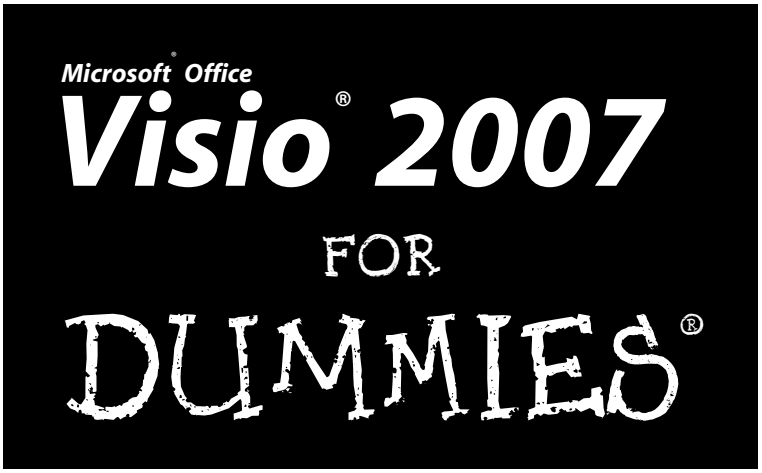

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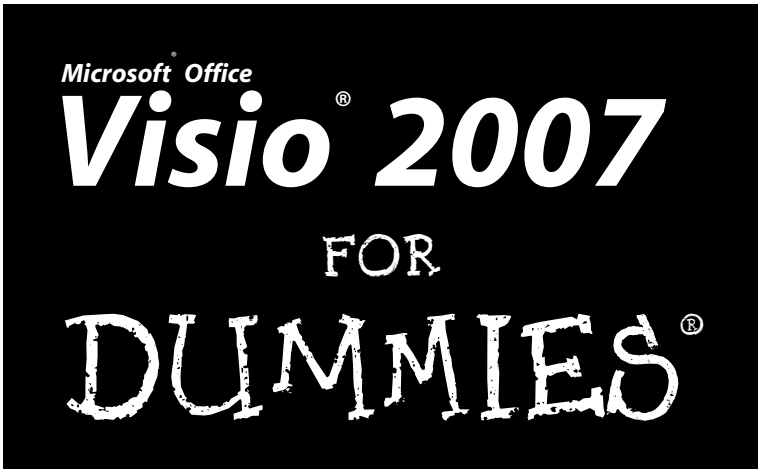

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Debbie Walkowski has worked in the computer industry for more than 20 years in a variety of positions from sales and marketing to teaching and training. For the last 14 years, she has made writing her primary focus. Her company, the Writing Works, specializes in writing computer self-help books and providing writing services to companies such as Microsoft Corporation, Hewlett-Packard (formerly Digital Equipment Corporation), and AT&T Wireless Communications. She has authored 18 books on popular computer software, including Microsoft Office, Microsoft Works, Microsoft PowerPoint, Microsoft Excel, Microsoft Project, Microsoft Windows, Visio, Quicken, WordPerfect, and Lotus 1-2-3.

Dedication

This book is dedicated to those purveyors of the medicinal latte, Muhammad and Marilyn Kharbush.

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From John Mueller: Thanks to my wife, Rebecca, for working with me to get this book completed. I really don't know what I would have done without her help in researching and compiling some of the information that appears in this book. She also did a fine job of proofreading my rough draft and page-proofing the result. She also had to do without my help in the garden this summer, which made things mighty tough on her.

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Introduction

Visio is one of the most flexible and easy-to-use drawing products around. Yet, its ease of use doesn't mean that this product lacks functionality. You can draw anything of just about any complexity you want. The whole focus of Visio is getting your ideas down on electronic paper as quickly as possible. Using this program means that you can think about your ideas, rather than how to perform the next task. *Visio 2007 For Dummies* introduces you to this very exciting drawing program and demonstrates the ever-growing number of features it provides.

Of course, you don't have to use all of these features. *Visio 2007 For Dummies* is structured like Visio — you can use as little or as much of the book as you want to achieve your level of comfort with Visio. If your only goal is to sketch out a few ideas using something better than a napkin, the first two parts of the book are all you need.

One of the most exciting things about Visio 2007 is that you gain access to a number of new productivity features. Instead of wasting time formatting shapes one at a time, you can use themes to format an entire drawing with one click. If that sounds interesting, you'll find the whole scoop in this book. Likewise, if you're tired of having to update the data in a drawing manually every time you open one, check out the new Data Link feature. This feature makes it possible to track changes to a system quickly and easily. Analysts will love the new PivotDiagram feature. You can drill down as far as necessary to see the interactions in your data when using Visio. These are just a few of the new features you'll find in this book.

About This Book

This book is for anyone who has an idea that he or she wants to put down on paper. It doesn't matter who you are; somewhere, someone has a template you can use to start drawing quickly and has a set of stencils with shapes for your particular trade. The number of templates and stencils that Visio provides is nothing short of amazing (read about them in Chapter 2). However, these templates and stencils are just the tip of the iceberg. Visio is all about you. Instead of forcing you to jump through hoops, Visio helps you get that idea down on paper. This book is your guide to all of the cool features that Visio provides. If you want to get started creating drawings for your ideas quickly, this is the book to get.

With this in mind, *Visio 2007 For Dummies* is designed to make you productive as quickly as possible. You find basic, useful information that helps you accomplish your goals. You find real-world examples and figures that *show* you how to do something rather than just *tell* you. You find concise step-by-step instructions for accomplishing specific tasks rather than a lot of rambling text that fills space and means nothing to you.

This book doesn't provide everything to everyone. For example, even though Visio supports Visual Basic for Applications (VBA) so you can write programs to make it do even more, this book doesn't discuss VBA. *Visio 2007 For Dummies* focuses on user tasks; it makes you more productive, fast.

Conventions Used in This Book

Here's a summary of the conventions used in this book:

- When directions indicate that you type something, for example, "Enter **13** in the size box," the characters you type appear in bold.
- When you are to *click* something, that means to click your left mouse button. *Right-clicking* is — you guessed it — clicking the right mouse button. (These terms assume that you are using the mouse with your right hand.)
- When you *drag* something, you click and hold the left mouse button as you move the mouse. Release the mouse button when you're finished dragging.
- The term *shortcut menu* refers to the pop-up menu that appears when you right-click something on the screen. (Shortcut menus are not available for all elements in a drawing.)
- You can select commands using toolbar buttons, menu commands, or the Alt key. Because toolbar buttons are by far the fastest method, these buttons are always listed along with the menu command. (When toolbar buttons aren't available, only the menu command is shown.) A menu command is specified by writing, for example, *Choose File➪Save*, which means click the File menu to open it and then choose the Save option.

What You're Not to Read

If you're new to Visio and just want to know enough to create simple drawings or diagrams, you can safely skip Part IV. That section takes you deeper into customizing Visio and using some of its advanced features. Clearly, not every reader will become devoted to discovering advanced features. Browse

through Part III for any features that you might find useful and have the time to work through. Also, glance through Part V, which contains many interesting tips, tricks, and trivia that you might find very useful.

On the other hand, if you've used Visio before, you can safely skip Parts I and II, which offer basic getting-up-and-running information.

Foolish Assumptions

You probably have a reasonable working knowledge of Microsoft Windows and have at least some idea of what you want to draw. For this reason, Chapter 1 doesn't spend any of your valuable time describing how to find your way around Windows or how to work with dialog boxes. If you need to review these concepts, see *Windows Vista For Dummies,* by Andy Rathbone (published by Wiley).

Although Chapter 2 does provide a basic overview of all of the templates available in Visio, this book doesn't tell you when you need to use the Unified Modeling Language (UML) Model Diagram template. If you don't already know what the UML Model Diagram does, you can safely skip that description. None of the examples in the book focus on a particular kind of diagram except when you need a specific diagram type to accomplish a particular task in the more advanced sections. In short, all of the procedures and techniques work for all diagram types unless the book specifically mentions that you must use a particular diagram type.

How This Book Is Organized

Visio 2007 For Dummies is organized into five distinct parts. Use the parts to guide you to where you want to go on your Visio journey. You don't need to read the chapters in order. The book is designed so that you can skip around to suit your needs.

Part 1: Starting with Visio 2007 Basics

Part I lays the groundwork for your success with Visio. Every software program has its unique personality; Visio is no exception. Here you find conceptual information about Visio, get the Visio terminology down, discover how to recognize and work with what's on the screen, start Visio, save and open files, and print drawings.

Part II: Creating Visio Drawings

Part II is for those in a hurry because it teaches you the basics of creating a *simple* drawing. You find out about the basic elements of a Visio drawing and discover how to implement those elements in your drawing. You'll also discover how to add and manipulate text, as well as how to work with margins and tabs, indentation, alignment, spacing, and more. You see how to use and manipulate a drawing's connectors, the lines that connect one shape to another. (They're more than just simple lines, as you'll soon discover.)

Part III: Taking Your Drawings to the Next Level

In Part III, you move into the intermediate features of Visio. You find out how to place shapes precisely on a drawing, create your own shapes, enhance and manipulate shapes, perform complex tasks with connectors, and work with pages and layers.

Part IV: Advancing Your Knowledge of Visio

Certainly not every user needs to pursue Part IV! Here you find out how to create custom templates and themes, how to store data in shapes and report on that data, and how to protect your shapes and drawings from inadvertent changes. You also see how to use Visio drawings with other programs and how to save files for publishing on the Web. Most importantly, this is the part that helps you discover the new Data Link and PivotDiagram functionality that Visio provides.

Part V: The Part of Tens

One of the most useful sections of every *For Dummies* book, "The Part of Tens" is a collection of a variety of information. In *Visio 2007 For Dummies,* you find ten "how to" pointers for useful tasks and ten pointers to online resources for Visio.

About the Web Site

This book contains a wealth of drawing examples, a few themes, some stencils, and other helpful Visio drawing information. Trying to replicate what you see in the book precisely could be time consuming and wholly unnecessary since the work is already done. Consequently, you'll find all of the art in this book on the Dummies Web site at `www.dummies.com/go/visiofd2007`. All you need to do is download it, locate the chapter you're working with, and open the drawing you want to use. The drawings all have names that make their purpose quite clear. Using the Web site content will help you discover Visio with greater ease without having to worry about becoming an artist to do it.

Icons Used in This Book

The following icons are used in this text to call attention to specific types of information.

The Tip icon indicates information that's likely to save you time or information that will make you say to yourself, "Wow, I never knew that!" Be sure to read this stuff.

Wherever a Technical Stuff icon occurs, you'll find a discussion of something that's bogged down in technical jargon. Generally, you can skip these paragraphs because they contain advanced information. However, more experienced readers will want to read this material because it provides essential information for advancing your skill further.

Definitely pay attention to the Warning icons. They're designed to warn you of impending doom or, at the very least, a possible problem you'd just as soon avoid.

Remember icons are designed as a gentle nudge rather than a blatant slam to the head. In other words, "Remember this — it may be important to you some day."

This icon draws attention to the slick new improvements in Visio 2007. Chapter 1 provides an overview of these new features. However, Microsoft improved Visio 2007 in a considerable number of ways, so it's important to look for these icons when you're upgrading from an earlier version of Visio.

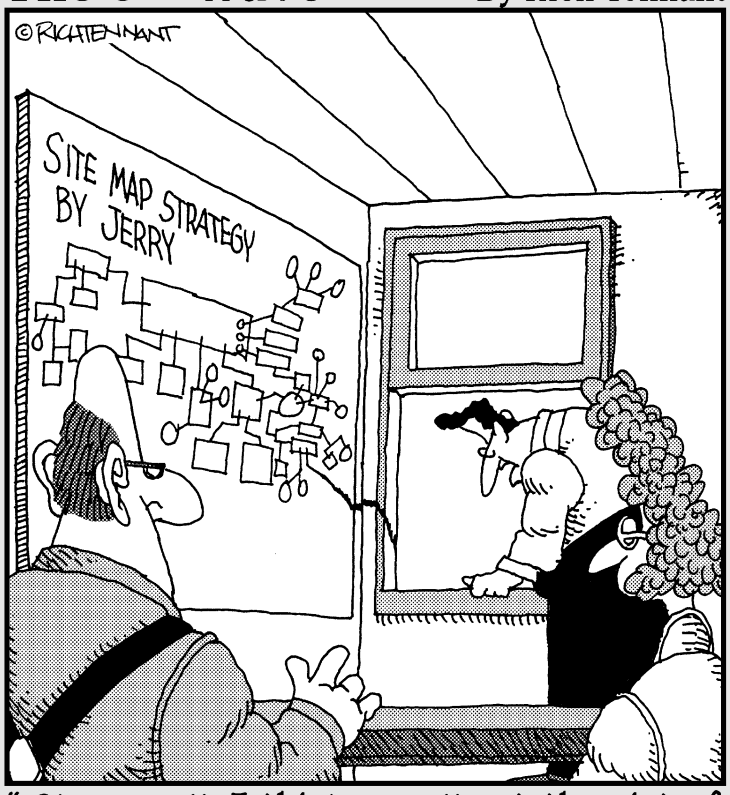
Where to Go from Here

If you've never used Visio before, definitely start with Part I! Work your way through Part II as well, but don't feel that you must go beyond this point. If you've used Visio before, you might get crazy and start with Part V, skim Parts I and II, and go directly to Parts III and IV to look for any features you might not be familiar with. Whether you are a beginner or an experienced Visio user, be sure to look through Part V for answers, tips, and pointers to Visio-related Web sites.

Part I

Starting with Visio 2007 Basics

The 5th Wave By Rich Tennant



"Okay, well, I think we all get the gist of where Jerry was going with the site map."

In this part . . .

Visio is an amazing program! If you can imagine it, you can probably sketch it using Visio. Many people use Visio as their only drawing application because it does provide great output, but many others use it for sketching their ideas and sharing them with others. In some respects, Visio is a tool for showing your dreams to others.

Other drawing applications help you create graphics. Visio, however, is a different animal. It's not really a drawing program, and it's certainly not a Computer-Aided Design (CAD) program. In this part, you understand what Visio is and what it does, you discover how to "speak" and "think" Visio, you negotiate your way around the screen, and you find out how to get help when you need it. You also print a drawing, something you'll no doubt find useful if you want to be productive!

This part of the book also provides a complete listing of the templates that Visio provides so that you better understand what comes in the package. Of course, you can always add to these basic templates. Look at the Visio offerings as a place to start.

Chapter 1

Visio 101

In This Chapter

- Getting the scoop on Visio features
- Understanding the lingo of Visio
- Opening Visio and touring the screen
- Getting help
- Closing the program

Close your eyes for a minute and picture the amount of visual information that comes to you on any given day. Magazines, newspapers, reports, television programs, and presentations illustrate a great deal of information in the form of charts, tables, graphs, diagrams, and technical drawings. These graphical elements often convey ideas far more quickly and clearly than long, boring paragraphs. You don't typically think of charts, diagrams, and graphs as *art,* but they are graphical, and this is where Visio comes in.

Although Visio is easy to use, you can benefit from a bit of explanation before you jump right in creating drawings. In this chapter, you become familiar with what you see on the Visio screen and find out how Visio works conceptually.

Getting the Scoop on Visio

In simple terms, Visio is a diagramming tool for anyone who needs to create drawings, even self-confirmed nonartists. Although many people view Visio as a *drawing* tool, it isn't one, because it requires no artistic ability. It's more accurate to say that Visio is a *diagramming* tool. That's reassuring because even in highly analytical, non-art-related careers, you may need to create a chart, diagram, or drawing! If the suggestion of drawing *anything* strikes terror in your heart, Visio can help.

Visio's grab bag of icons — or *shapes,* as Visio calls them — represents all sorts of things from computer network components, to office furniture, to boxes on an organization chart or a flow chart, to electrical switches and relays. Even programmers can use Visio to create diagrams that represent application elements and then use that content to create the application. You simply drag the shapes that you want into the drawing window, and arrange and connect them the way that you want. You can add text and other graphical elements wherever you like.

Comparing Visio products

Over the years, Visio has been available in several different flavors — Standard, Professional, Technical, and Enterprise — plus you could find advanced developer's tools in Visual Studio .NET and advanced network diagramming tools in Visio Enterprise Network Tools. Whew! All these versions became confusing and overwhelming to the average user, so Microsoft decided to simplify things and produce just two editions of Visio: Standard and Professional. The same "engine" drives both, but the audience for each is slightly different and the types of charts and diagrams you can create address different needs:

- **Visio Standard:** Designed for business professionals, this edition gives all kinds of businesspeople — from product managers to financial analysts to sales and marketing professionals — the ability to create business-related charts and diagrams that illustrate business processes, marketing trends, organizations, project schedules, and so on. However, just about anyone can make use of this version. For example, an office manager could use this version to show the office arrangement in a building or the structure of an organization. It's important to not limit yourself; Visio can help you diagram just about anything you can imagine as long as the diagram doesn't require the precise measurements normally provided by a computer-aided design (CAD) program.
- **Visio Professional:** Designed for technical users, this edition includes everything that Visio Standard includes and more. Network managers and designers, electrical engineers, IT managers, facilities planners, Internet specialists, Web designers and administrators, and software developers can use Visio Professional to create charts and diagrams that illustrate a wide variety of technical concepts and processes. The professional version also contains a number of database features that you can use to import data from other applications. For example, you could import information from Access and use it to create a special diagram.

So, how do you know which Visio is right for you? If you're involved in networks, IT, Internet or Web design, electrical engineering, architecture facilities planning and management, or software development, Visio Professional

is the edition to use because it provides all the shapes and symbols you need to create simple or complex diagrams. If you're not involved in any of these fields but are a business professional involved in company sales, profits, marketing, or managing projects, Visio Standard is right for you. It includes all the shapes you need to create business-related charts, diagrams, and drawings, without cluttering your screen with shapes you'll never use (such as a proximity limit switch or a guided light transmitter).

It's easy to get lost when you look at all of the diagrams that Visio can create. Many people get started using Visio for simple needs. For example, just about everyone needs a calendar from time to time. With Visio, you can create a custom calendar to meet any need. You can also use it to create directional maps to show someone how to get from the airport to your company. When working with Visio, it's best to start simple and work your way up to the complex diagrams used by various professionals.

A quick peek at some Visio features

Visio is often a misunderstood product, especially by those who've never used it. Some people limit Visio to drawing organizational charts, but it can do considerably more. The following list describes some of the tasks you can perform with Visio:

- **Printing what you want:** Even though creating a diagram in Visio is relatively easy, you still need to show other people the graphical representation of your ideas. Fortunately, Visio provides extensive printing capabilities, which means you get just the output you need. (See Chapter 3 for more information on printing everything from a simple calendar to complex floor diagrams.)
- **Diagrams without drawing:** Visio provides a wealth of shapes that you can use to create diagrams of any type. All you do is place the shape where you want to see it on-screen; no drawing is required! (See Chapter 2 for more information on using shapes to create any diagram type.)
- **Customize shapes easily:** One of the best features of Visio is that you can use it to customize shapes in a number of ways. You can add text, modify the size of the shape, change its appearance, and connect shapes. No matter what your skill level or how you use Visio, you can create professional-looking results with a few clicks. (See Chapters 5 through 7 for details on customizing shapes simply. Chapter 8 describes how you can create your own shapes when the defaults don't work. Chapters 9 through 12 show how to manipulate shapes in various ways.)
- **See only the data you need:** Data overload is a condition where you become overwhelmed by the very data that you're supposed to use to complete tasks. Layering in Visio helps you reduce complexity by letting

you see only the layer of data you actually need. All of the data is still there, but you only access it when you actually need it. (See Chapter 10 for ideas on how you can use layering to manage your data efficiently.)

- **Make your diagrams a group activity:** The ability to comment on ideas in a group is essential in business today. The diagrams that you create are ideas only they're in graphical, rather than textual, format. Visio helps you make the diagrams you create a group activity by providing a number of ways to add comments and revisions. (See Chapter 13 for more information on working with comments and the Visio review features.)
- **Report on data:** Wouldn't it be great if you could store data in a drawing and then report on that data? With Visio, you can. Suppose you draw an office layout plan that includes cubicle walls, fixtures, office furniture, and telephone and computer equipment. You can store each piece of furniture and office equipment with data such as its inventory number, owner, and current location. From this drawing, you can generate property, inventory, and location reports. (See Chapter 12 for more information on storing and reporting on data in shapes.)
- **Use the drill-down feature:** Jump quickly from an overview drawing to a detailed drawing and back again. For example, you can draw an overview map of a worldwide computer network and double-click the name of a city to see a drawing of that city's computer network. This drill-down feature is possible because Visio lets you define a shape's behavior when you double-click it. (See Chapter 12 for more information.)

- **Generate drawings from data:** In contrast to the previous point, wouldn't it be great to be able to generate drawings from existing data? Again, with Visio, you can. Suppose you have employee data (name, title, department, reporting manager, and so on) stored in a text or spreadsheet file. You can generate an organization chart automatically from this data using Visio. (See Chapter 14 for more information on using external data in Visio.)
- **Use hyperlinks:** Often, you can't convey in a single drawing all the information necessary to make your point. You might want to refer the reader to a separate drawing, a Web site, or another document with related information. With Visio, you can add hyperlinks to a drawing or shape. This is an invaluable feature for pulling pieces of information together to present a comprehensive picture. (See Chapter 14 for tips on using hyperlinks in diagrams.)

Visio actually provides support for eight categories of drawings. You can create everything from business charts to software and database diagrams. The "Understanding the Visio Drawing Categories" section of Chapter 2 provides a description of each of these drawing categories so that you have a better idea of precisely what Visio can do for you.