



University Information  
Technology Services

# Microsoft Office Visio 2016 for Windows

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Introduction to Visio

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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# University Information Technology Services

## Microsoft Office: Visio 2016 for Windows Introduction to Visio

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## Introduction

This booklet is the companion document to the Microsoft Office: *Visio 2016 for Windows: Introduction to Visio* workshop. Microsoft Visio is flowcharting software that can be used to represent processes, workflows, networks, office organizations, data flows, cause and effect diagrams, timelines, floor plans, electrical circuits, charts, and more. This booklet covers the creation of a flowchart, an organizational chart, and a timeline.

## Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Use the Visio 2016 Interface and Ribbon to create and enhance your drawings
- Create drawings from templates and starter diagrams
- Drag and drop shapes from stencils onto your drawing window and connect the shapes in your drawing
- Modify the theme and style of your drawings, diagrams and charts
- Save and print all of your drawings

# The Visio 2016 Interface

## The Ribbon

The ribbon is a panel that contains functional groupings of buttons and drop-down lists organized by tabs. The ribbon is designed to help you quickly find the commands that you need to complete a task.

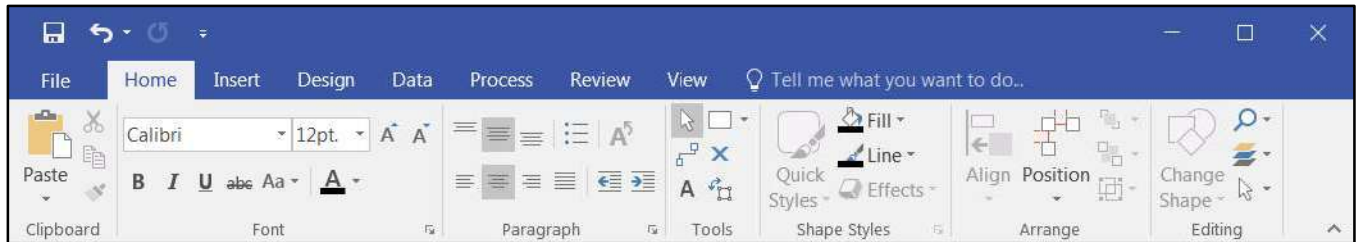


Figure 1 - The Ribbon

The ribbon is made up of a set of tabs that pertain to the different functionalities of *Visio*, such as designing pages, inserting objects onto pages, or linking data to shapes. Each tab is further divided into logical groups (of buttons), such as the *Font* group. There are also “contextual tabs” that appear, depending on what you are working on at that time. For example, if you insert pictures, the *Picture Tools* tab appears whenever a picture is selected.

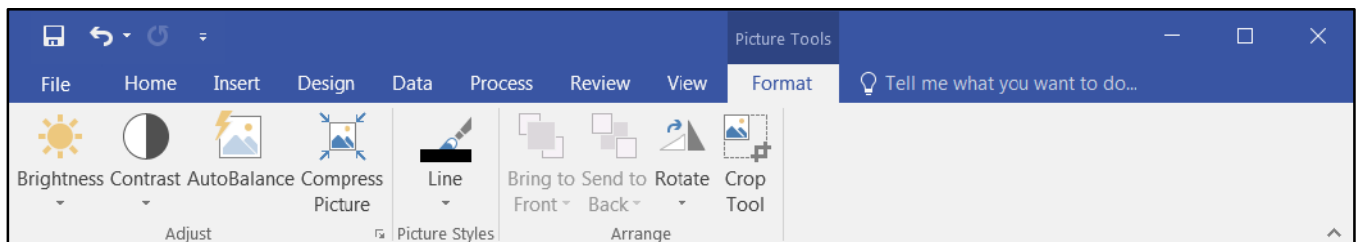


Figure 2 - Contextual Tab

## The File tab (Backstage View)

The **File** tab provides a centralized location called the *Microsoft Office Backstage View*, for all tasks related to *Visio* file management, which includes opening, creating, closing, sharing, saving, printing, converting to PDF, and emailing.



Figure 3 - The File Tab

The *Backstage View* also allows for viewing document properties, removing personal information, and reducing the file size by removing unused items.

1. **Back** - Takes you back to edit your drawing (see Figure 4).
2. **Info** - Allows you to restrict permissions, remove personal information, reduce file size, and check compatibility with earlier versions of Visio (See Figure 4).
3. **New** - Create a new drawing from a blank or pre-formatted template (see Figure 4).
4. **Open** - Open a drawing (see Figure 4).
5. **Save** - Save the drawing (see Figure 4).
6. **Save As** - Re-save a saved drawing as a different filename or file type (see Figure 4).
7. **Print** - Configure how you want to print (see Figure 4).
8. **Close** - Close the drawing (see Figure 4).

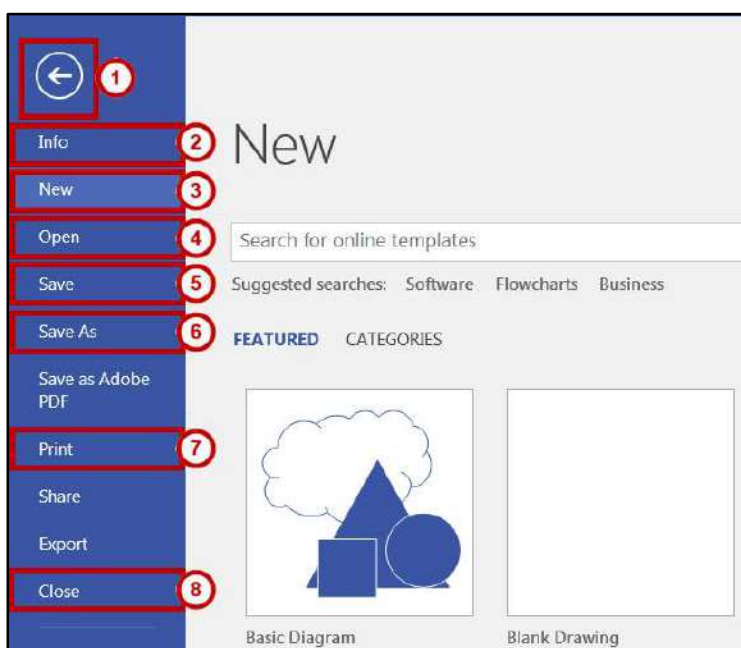


Figure 4 - The Backstage View (File tab)

## The Home Tab

The *Home* tab is where you will spend the majority of the time in Visio along with the drawing *Stencil* populated by your choice of template drawing. Along with your *Stencil*, it contains the main tools that will help you create and customize your drawing. It contains buttons and drop-down menus that allow you to use copy and paste features, modify fonts, format text, insert shapes, make connections, and arrange the elements of your drawing.

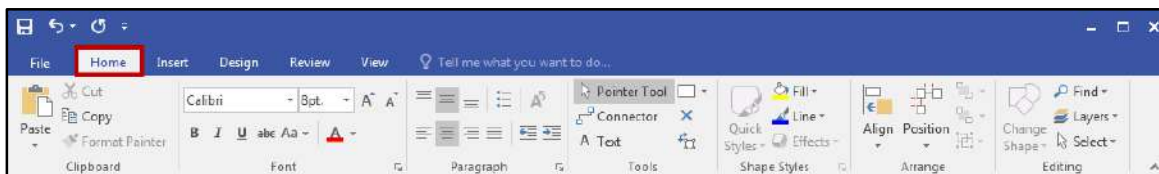


Figure 5 - The Home Tab

## The Insert Tab

The *Insert* tab contains groups of buttons and drop-down menus to allow you to insert illustrations, diagram parts, links, and text in addition to shapes that are part of the template you select to build your drawing.

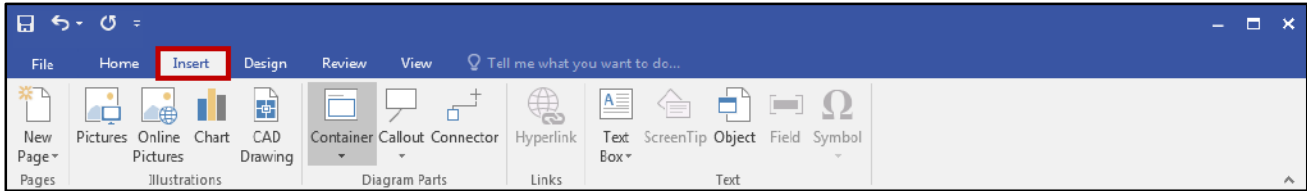


Figure 6 - The Insert Tab

## The Design Tab

The *Design* Tab contains groups of buttons and drop-down menus to modify the page setup, color schemes (or themes), backgrounds, borders, titles, and basic layout of your drawings.

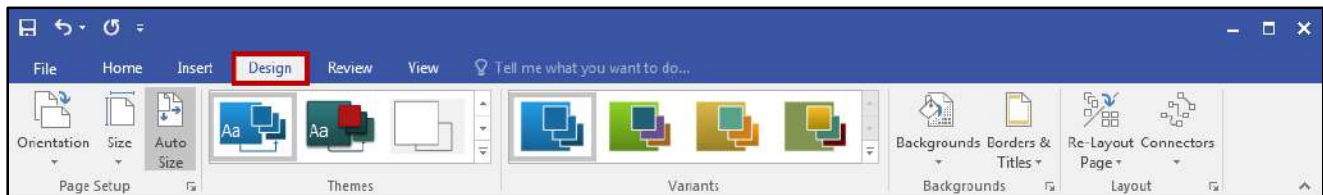


Figure 7 - The Design Tab

## The Review Tab

The *Review* tab contains groups of buttons and drop-down menus to help with proofing and language use as well as enable reviewers to provide comments and notes for revision.

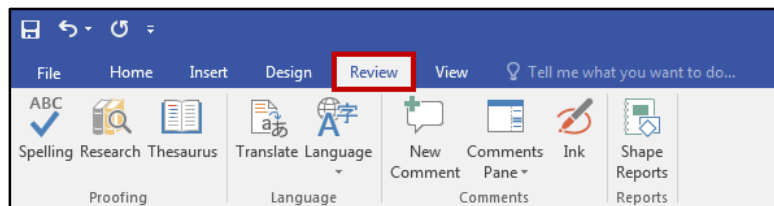


Figure 8 - The Review Tab



## The View Tab

The *View* tab contains groups of buttons and drop-down menus to enable you to personalize your view of the drawing screen. You can show various tools to make it easier to create and view: such as rulers, gridlines, guides, and page breaks. You can also *Zoom* your view to better view certain parts of your drawing or *Fit to Window* to view the entire drawing in a single window. There are also checkboxes to enable visual aids for your drawing. If you have multiple drawings in one file, you can also use the *Window* group to alter the arrangement of widows to suit your needs and switch back and forth between them.

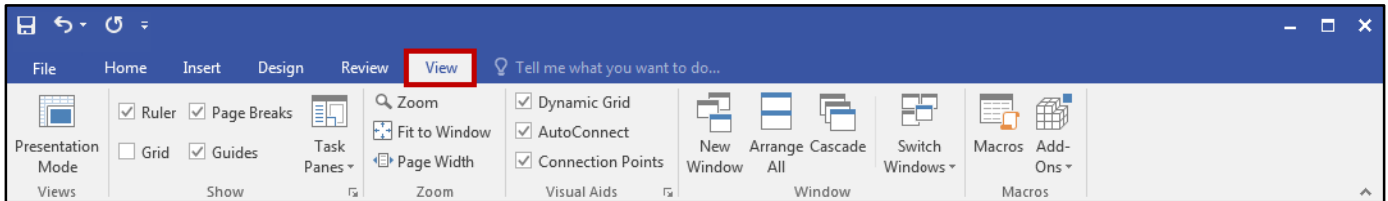


Figure 9 - The View Tab

## The Tell Me Tool

The **Tell Me** dialog box lets you enter keywords and phrases related to what you want to do next to quickly access features or actions. It can also be used to look up helpful information related to the topic. It is located on the *Menu bar*, above the *ribbon*. The following explains how to use the *Tell Me* functionality.

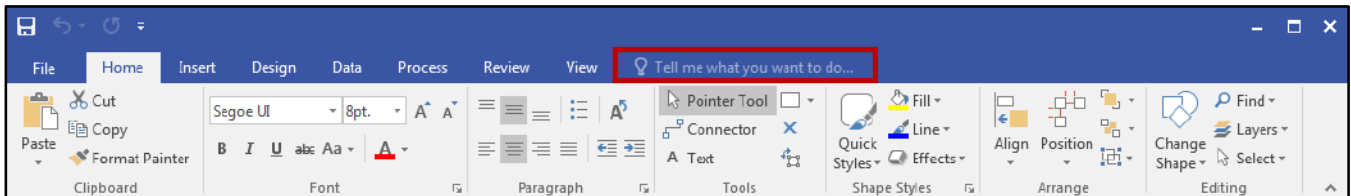


Figure 10 - Tell Me Dialog Box

1. Click in the **Tell Me** dialog box, then enter what you are looking for.
2. A drop-down list of commands and features appears based on the topic entered.

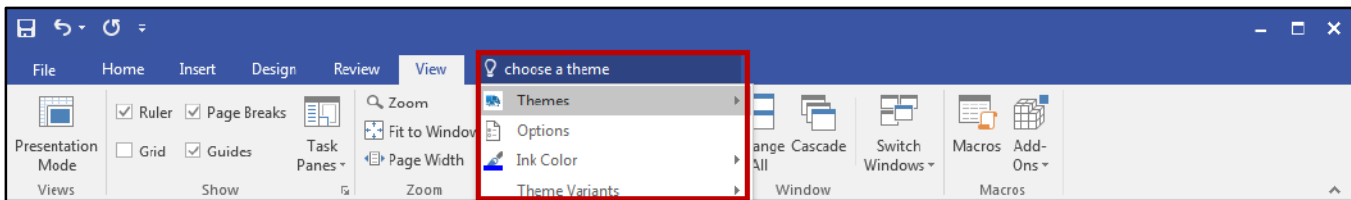


Figure 11 - Tell Me Drop-Down Menu

3. Click on the command or function you want to use. For this example, click **Themes**.

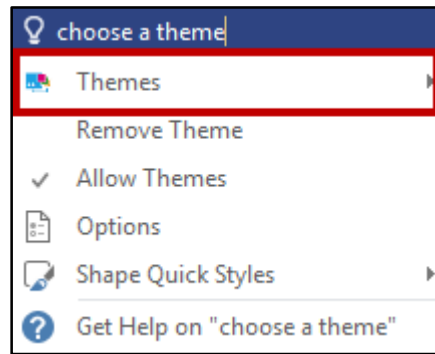


Figure 12 - Select Themes

4. A drop-down menu appears to display the current theme and additional themes available for selection.



Figure 13 - Theme Selection Window

5. Hover over the theme to preview your chart with the alternate theme. Then, click the **theme** you want to apply to your diagram.



Figure 14 - Apply New Theme

6. Your diagram is updated to display the background and color scheme for the new theme selected.

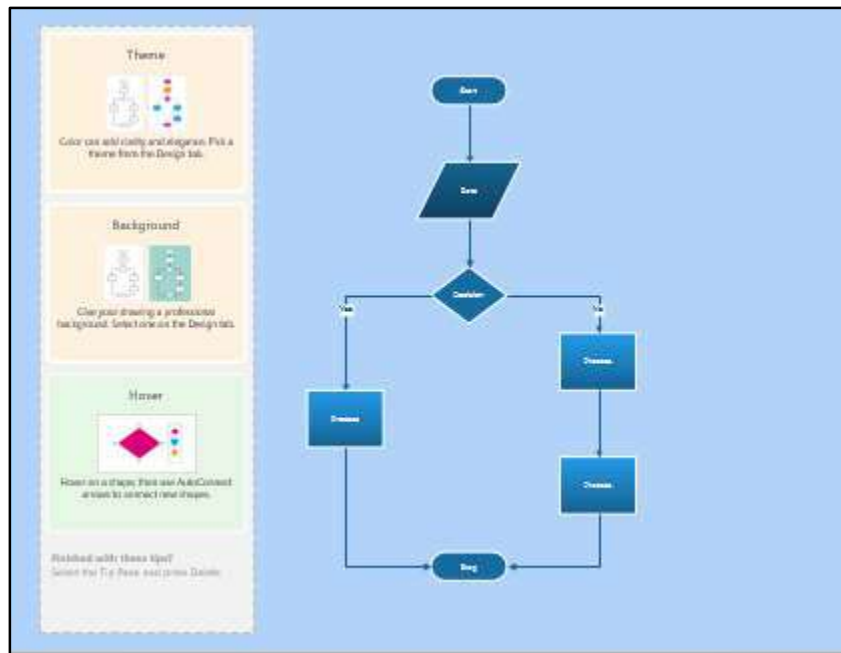


Figure 15 - New Theme Applied

## Using Starter Diagrams

Visio 2016 contains starter diagrams for 15 diagrams and flowcharts to help create diagrams quickly and easily. To access the starter diagrams, simply select the template category and select the starter diagram you want to use. Then, follow the prompts supplied by the starter diagram to perform various tasks such as changing the theme, adding a background, and modifying the starter diagram as needed for your drawing. For this example, we will use a *Basic Flowchart* starter diagram.

1. Click the **File** tab.
2. Choose **New**.
3. Select the **Flowchart** template category.

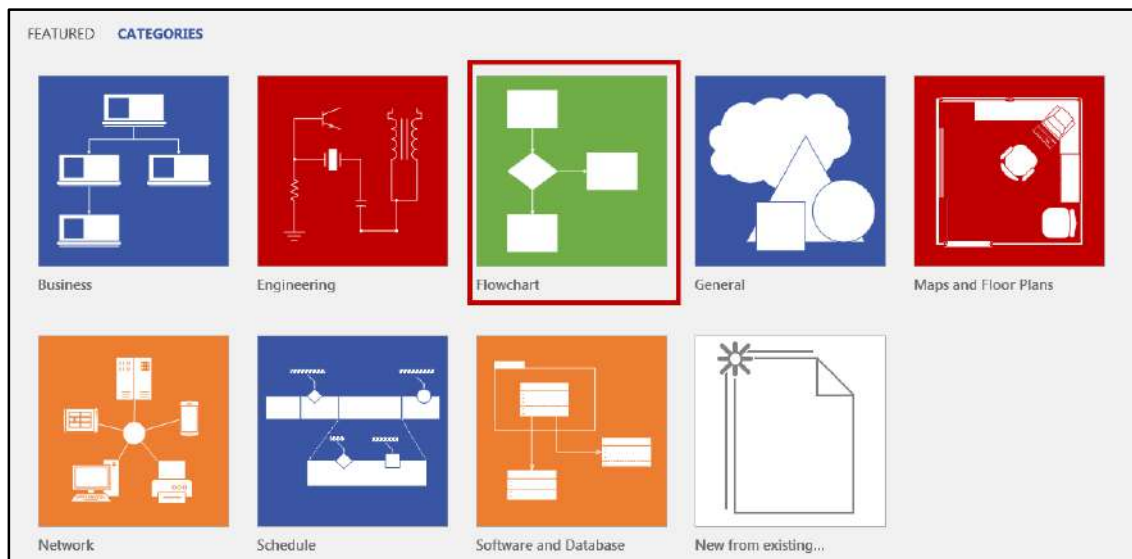


Figure 16 - Select Flowchart Category

4. Click **Basic Flowchart**.

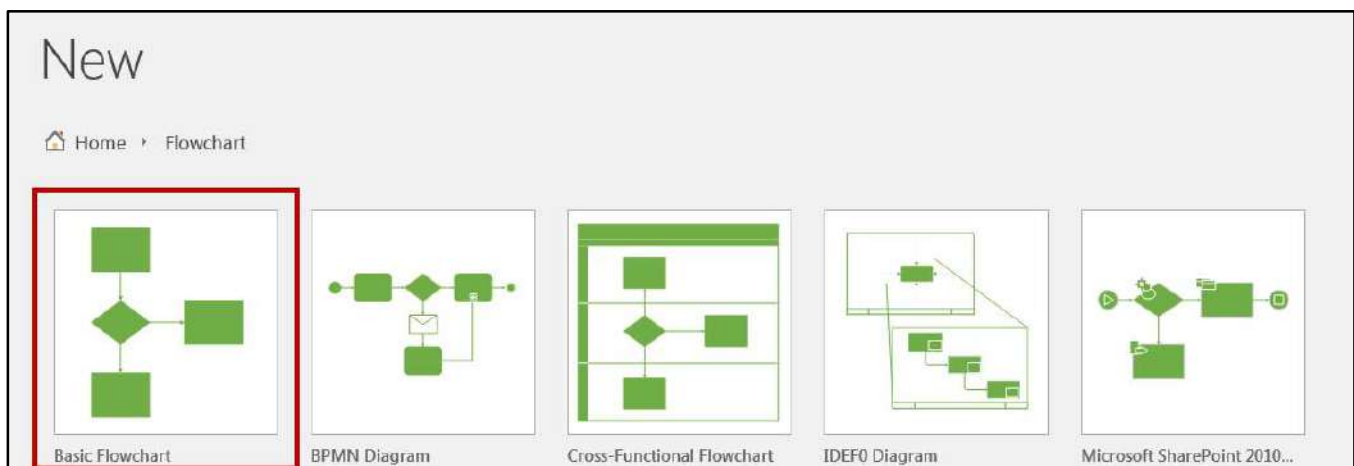


Figure 17 - Select Basic Flowchart