Edge Hill University

Visio – Getting Started
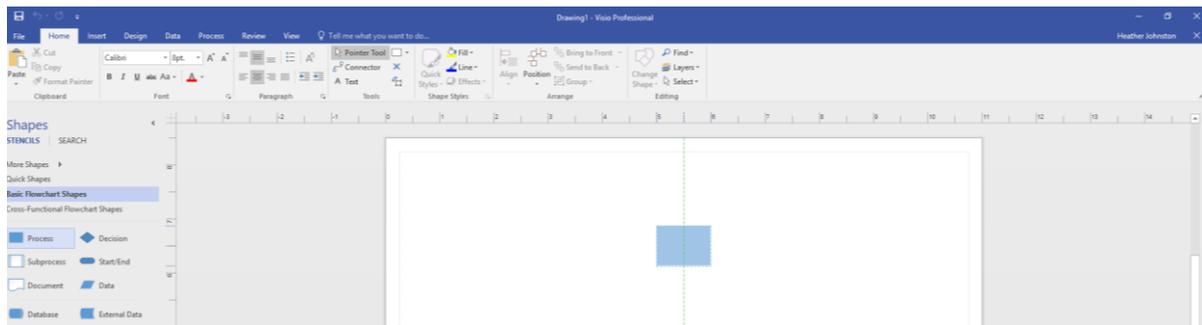
Contents

Flowcharts - Adding Shapes

To begin creating a flowchart in Visio, go to **New - Basic Flowchart** and click **Create**.

On the left of the screens are the basic shapes needed to make a flowchart. To add any to your diagram, simply drag them across. You will see green lines on the screen to help you align a shape centrally.

If you hover over the shape you have added, you can see arrows appear from each direction with suggestions of the next shape you may want to use. Click on one of these **smart shapes** and it will connect it to the original shape.
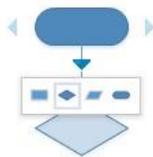

The smart shapes which are suggested are the top four shapes in the list on the left of the screen. To get different ones to appear, simply drag to reorder them in the list on the left.

Flowcharts - Connecting Shapes

If you wish to add a shape which is not in the top four smart shapes, you can simply drag it across from the list on the left. However, it will not automatically connect to the previous shape.

To connect the shapes, go to the **Home** tab and choose **Connector.** Drag the arrow into the position you need.
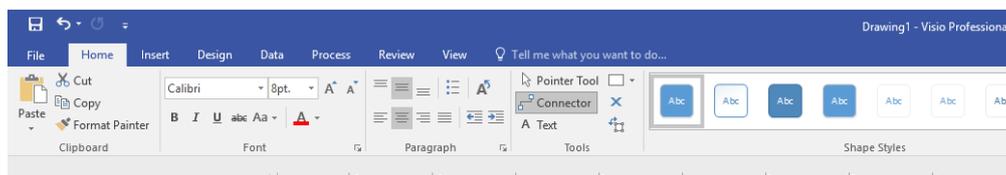
Flowcharts - Adding Text or Hyperlinks

If you want to add text to any of your shapes or connectors, double click on them and Visio will zoom in and allow you to type. You can edit your font style and colours through the Home button.

You can also create hyperlinks so when you click on a specific piece of text or a shape, it links the user to a website or another document.

To do this, select the shape or information you wish to turn into a link. From the ribbon, click on **Insert** and **Hyperlink.** From the box which appears, click **Browse** to choose whether to link to a local file or a web address and enter the details. Click **OK** when you are happy with this.

Flowcharts - Formatting

You can change the look of your flowchart by applying a different theme. These are available through clicking on **Design**, choosing a **Theme** and then choosing a **Variant**. If none are suitable, you can click on **Variants - Colours** and **Choose New Theme Colours**. Alternatively, you can colour each box in your diagram separately by right clicking on it, choosing **Format Shape** and editing the **Fill Colour.**

You can ensure the spacing between your shapes is even and the alignment is consistent by clicking on **Home - Position** and **Auto Align and Space**
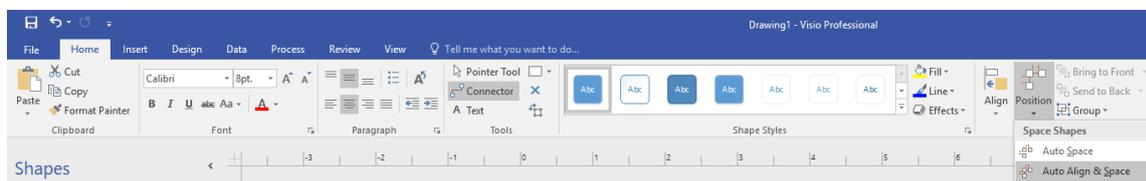
If you want to send your chart to someone who does not have Visio, you can choose to save it as a JPEG or PDF from the **Save As** menu, ensuring that your recipient can open and see the chart.

Cross Functional Flowcharts

Use cross functional flowcharts when you want to diagram a process and make it clear who is responsible for each step.

To begin click **New - Cross Functional Flowchart.**

Cross functional flowcharts are organised into sections called swimlanes, which show who is responsible for what. To add a swimlane, ypu can drag one across to the left, or right click on an existing swimlane to insert one before or after, Double click on the word **Function** to replace with your own text.

Once you have set up your swimlanes, you add your flowchart shapes as normal, ensuring they are placed in the correct section.
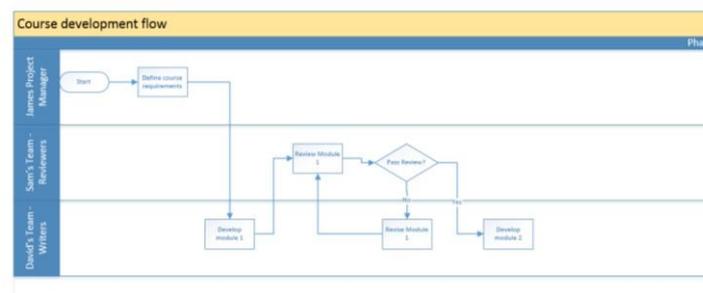
You can format the chart using the same tools as an ordinary flowchart. You can also add separators to show different phases of the process, or add containers to group certain parts together.

Organisational charts - Adding People

To begin, select **New - Organisational Chart** and click **Create.** Various shapes relevant to an organisational chart will appear in the left of the screen. You can change the style of the shapes by choosing from the different options under **Shapes** in the **Org Chart** tab.
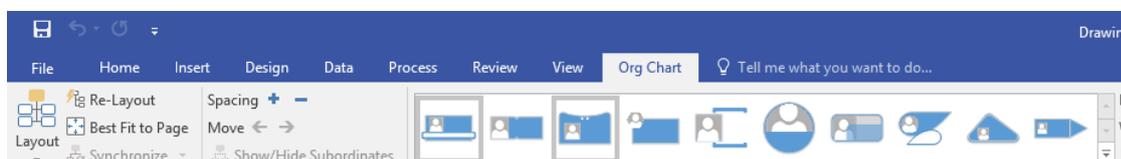
Organisational charts are built starting with the person at the highest position in the organisation, who would be represented by an Executive shape. Drag this across, using your green alignment guide to position it.
Within the box is a space to write the name of the person and the title of their position.

You can also add a picture of the person by clicking on the Picture icon and choosing **Change** to select an image you have saved. You can get rid of the image by clicking **Delete**.
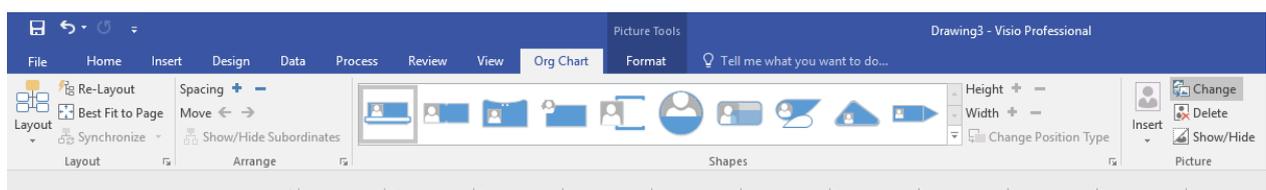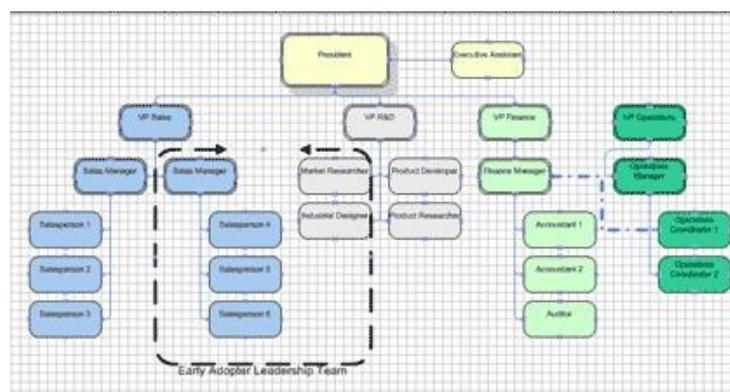
Organisational charts - Layout

 You can change the way the hierarchy of staff is positioned. By default, when you add members of staff, Visio will adjust the layout automatically. For example, if I add 3 positions beneath the manager, Visio automatically displays them vertically.   You may want these three staff members to display horizontally beneath the manager, To achieve this, click on the manager position, click on **Layout** and choose **Horizontal. T**he three positions beneath this will now be positioned horizontally.
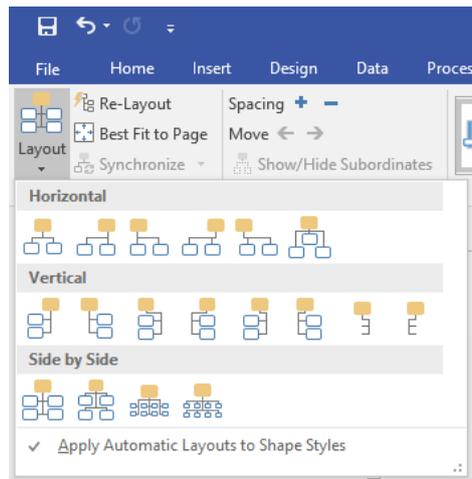
Organisational charts - Teams

 Sometimes people may not be under the same line manager but may be a team in some way or working on a project together. You can add a **Team Frame** around these people to show this in Visio. To do this, click on Team Frame and drag it around these people. You can click on **Team Title** to name the team.

Organisational charts - Styles

 You can change the look of the organisational chart by applying a different theme. These are available through clicking on **Design**, choosing a **Theme** and then choosing a **Variant.**

You can change the colour of any of the shapes individually by right clicking on the shape, choosing Format Shape and then selecting a fill colour.

Organisational charts - Using the Wizard

You can create organisational charts from existing Excel or txt files using the Wizard. Make sure your original data source includes the title, name and who each person reports to.

When opening Visio, choose to create an organisational chart using the wizard **with information that is already stored in a file or database.**

Select the file and make sure the fields match up and will be displayed as you require. Click **Finish** once you are happy and your chart will appear in your document.
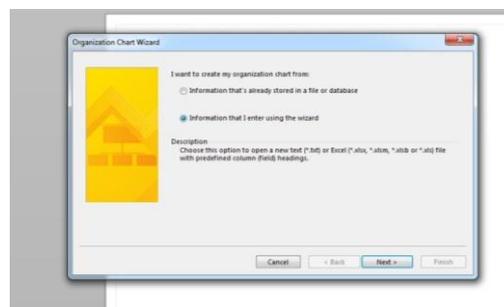

Organisational charts - Copying to other Applications

You can copy your chart into another application like PowerPoint, To do this, select on the chart and click **Copy** and in the application you wish to paste into, click **Paste Special** and choose to paste as a **Visio drawing object**, This allows the chart to still be edited in Visio.

Timelines - Setting up

To begin creating a timeline in Visio, go to **New - Timeline** and click **Create.** You can choose from having a block timeline, line or cylinder timeline. Drag your chosen style across from the left.

A box will appear asking you to configure your timeline. Choose the appropriate start and end dates and time scale. Once happy click **OK.**
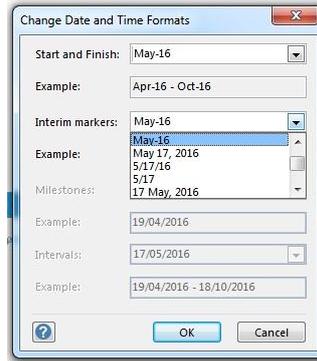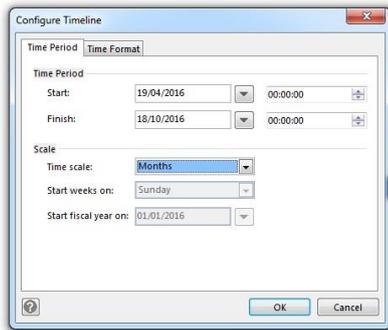
If you want to change your dates or the format afterwards, click on the timeline and choose **Configure** or **Date/Time Format**. For example if you only want your interim markers to show the month and year, you can select this from the drop down box next to Interim markers in Date and Time Format.

Timelines - Adding Milestones

You can add specific milestones to your timeline by dragging the style of milestone you want across to the timeline. You will be asked for a milestone date and description. Visio will then put it in the correct place along the line.
If you wish to move the marker so it appears underneath the line, drag it by the yellow square at the end of the line into a different position.
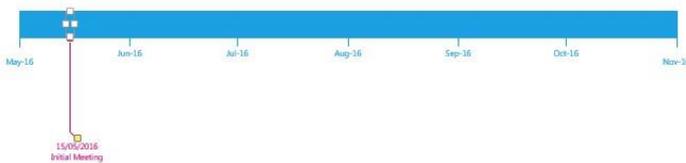
Timelines - Adding Intervals

If you want to show it is going to take a few days or weeks to do a specific part of a project then you can use an interval – a block of time dedicated to a specific part. To do this, drag an interval across to your document. You can choose a block interval or brackets interval. Add the details about the start and end dates and the subject of this interval and it will appear on your timeline like this.
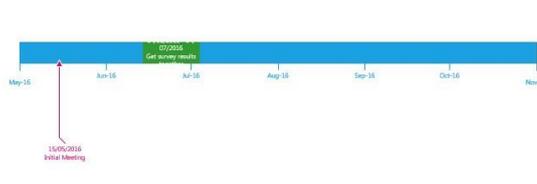
Timelines - Today Marker

You can add a marker on your timeline which shows 'Today' to see where you are up to in relation to your plans.

To add this, drag a **Today Marker** across onto your timeline.

Timelines - Expanded

This allows you to zero in on a specific area or time interval on your timeline and expand it out to view details.

To do this, click on Expanded Timeline and drag it over to your document. You will be asked to add the dates for which you wish to create an expanded view. This then creates a zoomed in expanded version of that small section of timeline.
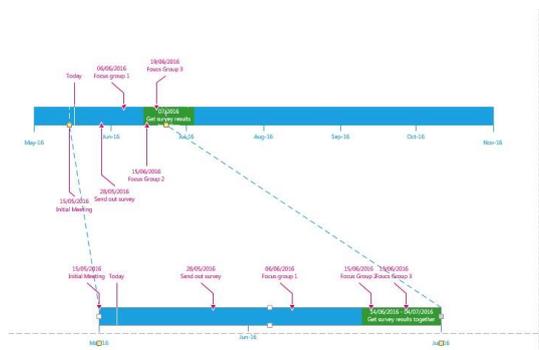
Timelines - Styles

You can edit the style of your timeline. To do this, go to **Design,** choose from the themes and then choose a **Variant.**