

***Visio***<sup>®</sup> **2003**  
FOR  
**DUMMIES**<sup>®</sup>

**by Debbie Walkowski**



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***Visio***<sup>®</sup> **2003**

FOR

**DUMMIES**<sup>®</sup>



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## *About the Author*

**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, Word Perfect, and Lotus 1-2-3.





# Dedication

For Frank, the brightest and most enduring star in my life.

# Author's Acknowledgments

When I was introduced to Visio nearly ten years ago, I was instantly impressed with the product. Visio was a fresh and creative answer to the drawing and diagramming challenges many business professionals faced. It was unique; nothing like it existed in the marketplace. The fact that Visio has survived the demands of a frenzied, fickle, and often unforgiving high-tech software industry is a testament to its quality, innovation, and usefulness.

Not only was I impressed with the product, I was bowled over by the quality and dedication of the people at Visio Corporation (then the owner of Visio). Throughout the process of writing three books on Visio, I found the people at Visio Corporation an invaluable resource — some of the finest, dedicated, top-notch professionals I have ever had the pleasure of working with. Stacy Dellas, Charlie Zaragoza, and Lorrin Smith-Bates, all top Visio corporate trainers, were always available to teach, demonstrate, and answer questions. Their contributions to my earlier Visio books still carry through to this edition of *Visio 2003 For Dummies*, my fourth book on this product.

Today Visio is owned by Microsoft Corporation. I would first like to thank Carla Hartwig, a Microsoft Product Manager for Visio, who provided much-needed details about Visio 2003 before its release and who continues to keep me updated on the product. At Wiley, I'd like to thank Terri Varveris, acquisitions editor, for giving me the opportunity to update my earlier book, *Visio 2000 For Dummies*. I credit Terri for recognizing the need in the marketplace for this update. My sincerest thanks go to Susan Pink, project and copy editor extraordinaire! Not only does she have excellent editing skills, she has the calm, in-control, unflappable personality that makes the editing process for the author so much easier. Susan often went above and beyond the call of duty; she is a real pro. Thanks, also, to Allen Wyatt, technical editor, whose dedication to accuracy helped make this book technically reliable. And finally, I offer my heartfelt thanks to my husband, Frank, who was not only endlessly supportive throughout this process but spent countless hours creating Visio drawings, testing Visio functions, and capturing figures for this edition of the book. I couldn't have completed this book on time without his help. My deepest thanks to *all* of you for your dedication to excellence!

## **Publisher's Acknowledgments**

We're proud of this book; please send us your comments through our online registration form located at [www.dummies.com/register/](http://www.dummies.com/register/).

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# Introduction

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Okay, relax! I know as well as you do that you're not a dummy. But you may feel like one when it comes to using Visio — or any other software program you're not familiar with. Let's face it: No one is an expert with *every* computer program. And no one wants to feel like a dummy. That's what's so great about *For Dummies* books. They show you just what you need to know so you don't feel like a dummy anymore.

Visio can be a fun program to use, but it can also be intimidating at first. Why? Because there are so darn many types of diagrams, and we don't have a clue what some of them mean! (We'd all like to think we know, but the truth is, we don't.) The good news is, you don't *need* to. All you need to know is how to create diagrams that make sense for *you*, for your specialty, for your industry.

I am thrilled to be updating *Visio 2000 For Dummies*, published in July of 2000. Since then, Visio has been through big changes, not the least of which was the purchase of Visio by Microsoft Corporation. With the release of Visio 2003, Visio officially becomes part of the Microsoft Office suite of products, and future releases will be launched in sync with other Office products. Visio 2003 has undergone some exciting changes and incorporated great new features. This book brings you up-to-date on the latest advances for Visio and gives you tips on using Visio with other programs.

## About This Book

Pay attention to the title of this book: If you are a programmer, this book is probably not for you! If you're "one of the rest of us" (and we're definitely in the majority!), this book is just what you need. You probably have a job to do — and I'm betting it's *not* to pore over the minute details of Visio's inner workings so you can impress your friends with your vast knowledge. You probably just want to find out enough about Visio so you can make drawings that *enhance* the job you do, not *become* it.

With this in mind, *Visio 2003 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.

## 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 I write *click*, I mean to click your left mouse button. If you need to right-click, I specify *right-click*.
- ✓ When I write *drag*, I mean to 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, I always list them along with the menu command. (When toolbar buttons aren't available, I list only the menu command.) I specify a menu command 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

I assume that you have a reasonable working knowledge of Microsoft Windows. For this reason, I don't spend any of your valuable time in Chapter 1 describing how to find your way around Windows or how to work with dialog boxes. If you need to review these concepts, see *Windows XP For Dummies*, by Andy Rathbone (published by Wiley Publishing, Inc.).

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## *How This Book Is Organized*

*Visio 2003 For Dummies* is organized into five distinct parts. Use the parts to guide you to where you want to go on your Visio journey. The book is designed so that you can skip around to suit your needs.

### *Part I: Starting with Visio 2003 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 how to implement those elements in your drawing. I show you how to add and manipulate text, as well as how to work with margins and tabs, indentation, alignment, spacing, and more. You also 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. Find out how to place shapes precisely on a drawing, create your own shapes, enhance and manipulate shapes, do more sophisticated stuff 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 I show you how to create custom templates and styles, 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 save files for publishing on the Web.

## 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 2003 For Dummies*, you find answers to ten frequently asked questions, ten “can I?” questions, ten “How to” pointers for useful tasks, ten tips for working successfully with Visio, and ten pointers to online resources for Visio.

### 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.



Whenever a Technical Stuff icon occurs, I explain in lay terms something that’s bogged down in technical jargon. (Then again, sometimes the icon just points out technical trivia.) You won’t find too many of these icons but when you do, the text is usually worth reading.



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 someday.”



I use this funky little icon to point out weird stuff that Visio does every now and then.



This icon draws attention to the slick new improvements in Visio 2003.



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## *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 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 2003 Basics

The 5th Wave By Rich Tennant



"NIFTY CHART, FRANK, BUT NOT ENTIRELY NECESSARY."

## *In this part . . .*

**S**o your boss says you have to make a Visio drawing and you barely even know what Visio is? Well, this is the place to start.

Maybe you've seen other drawing programs. Visio, however, is a different animal. It's not really a drawing program, and it's certainly not a CAD program (thank goodness!). 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!

# Chapter 1

## Visio 101

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### *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
- 

**C**lose 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 business professionals, many of whom are self-confirmed non-artists. Although Visio is often referred to 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 be called upon to create a chart, diagram, or — perish the thought — a *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. 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.

For those of you with a computer-aided design background, *don't think CAD* with Visio! Although the finished product — a drawing — may look similar, Visio and CAD-based systems are different animals. If you're a self-confirmed CAD snob, that's okay, but don't underestimate or misunderstand Visio. Visio and CAD-based systems have different purposes and work entirely differently.

## *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 business people — 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.
- ✔ **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.

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).