Microsoft Visio 2010

Visio 2010 Tips and Techniques

Core Concepts and Solutions

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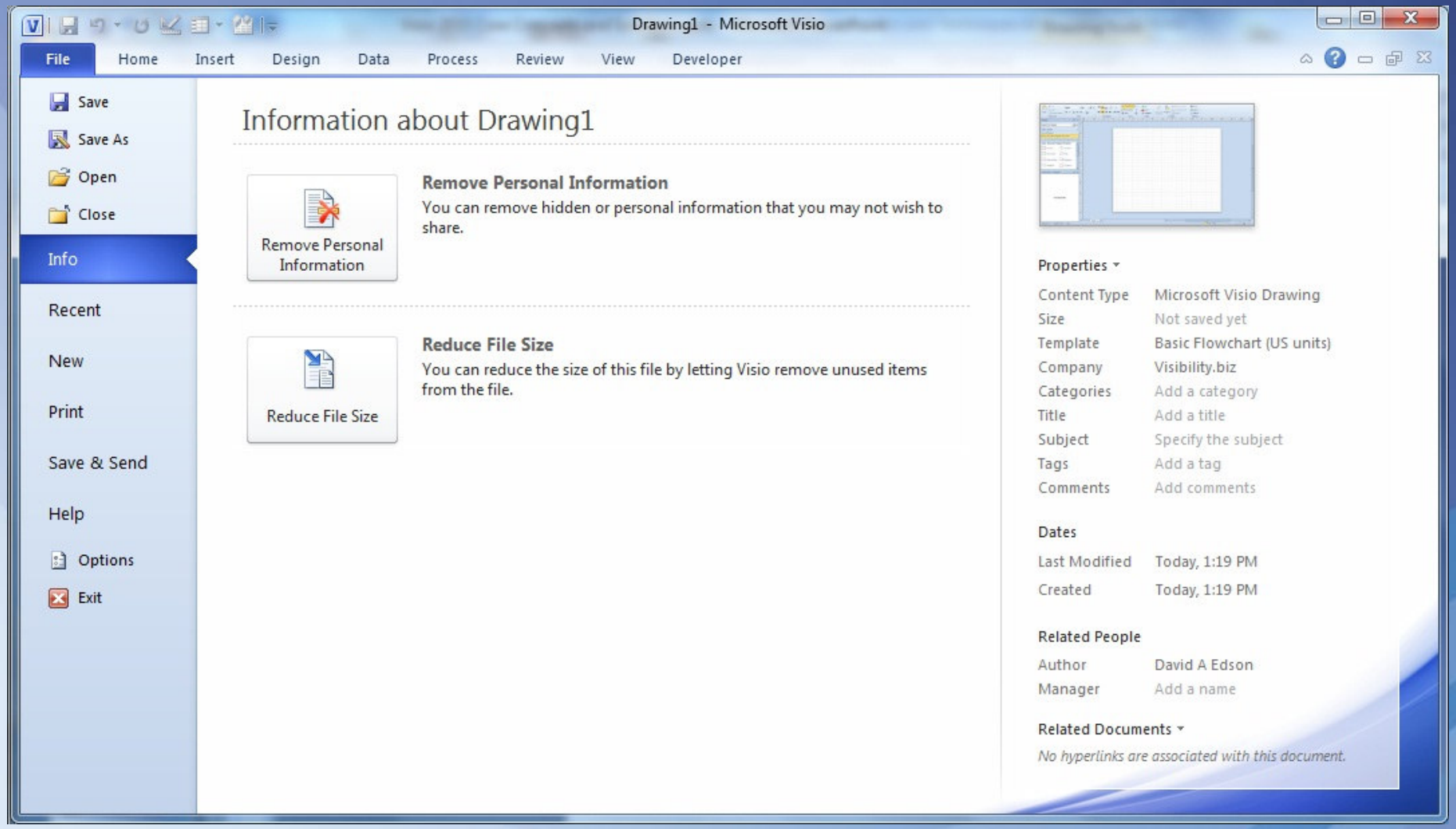
Agenda

- The Visio 2010 Fluent UI (The Ribbon)
- Connected Diagrams
- Hierarchal Diagrams
- Scheduling Diagrams
- Publishing Diagrams

The Fluent UI (The Ribbon)

- File (Backstage Area)
- Home Tab
- Insert Tab
- Design Tab
- Data Tab
- Process Tab
- Review Tab
- View Tab
- Developer Tab (Available ONLY with “Run in Developer Mode” enabled)
- Quick Access Toolbar

File Tab (Backstage View)



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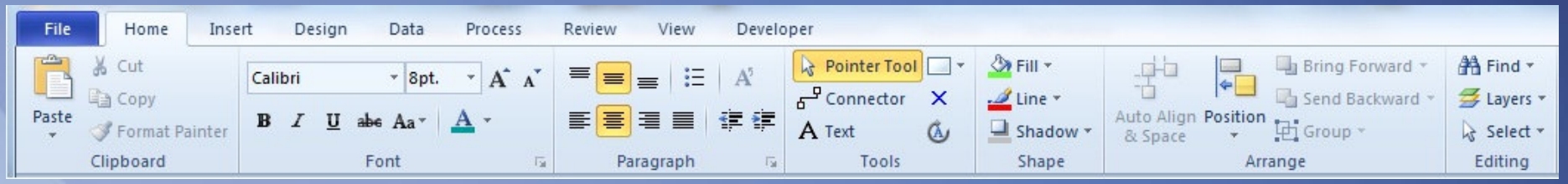
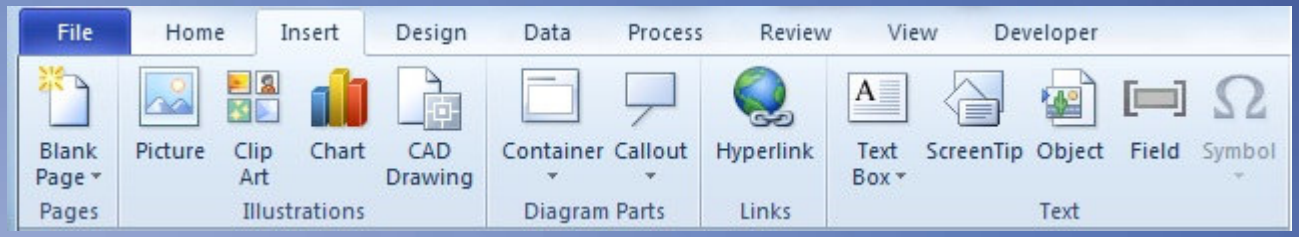
Home Tab



- Clipboard
- Font
- Paragraph
- Tools
- Shape
- Arrange
- Editing

Insert Tab



- Pages
- Illustrations
- Diagram Parts
- Links
- Text

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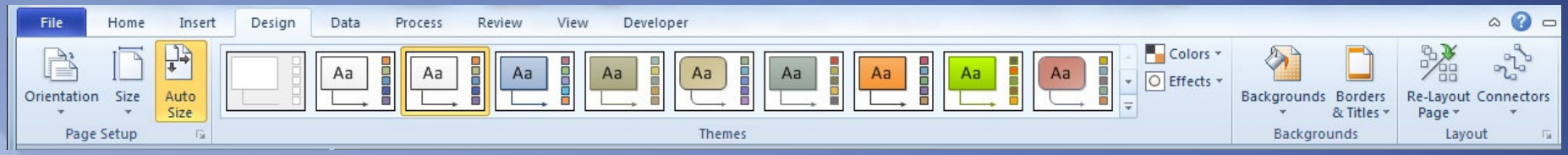
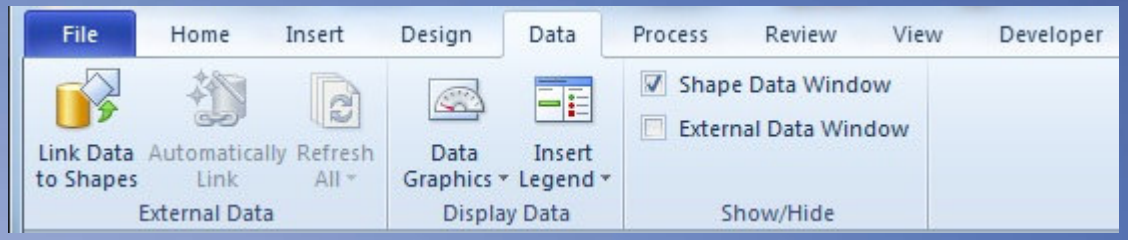
Design Tab



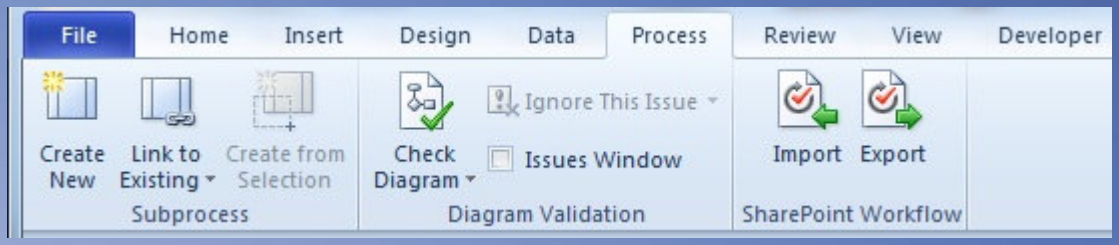
- Page Setup
- Themes
- Backgrounds
- Layout

Data Tab



- External Data
- Display Data
- Show/Hide

Process Tab



- Subprocess
- Diagram Validation
- SharePoint Workflow

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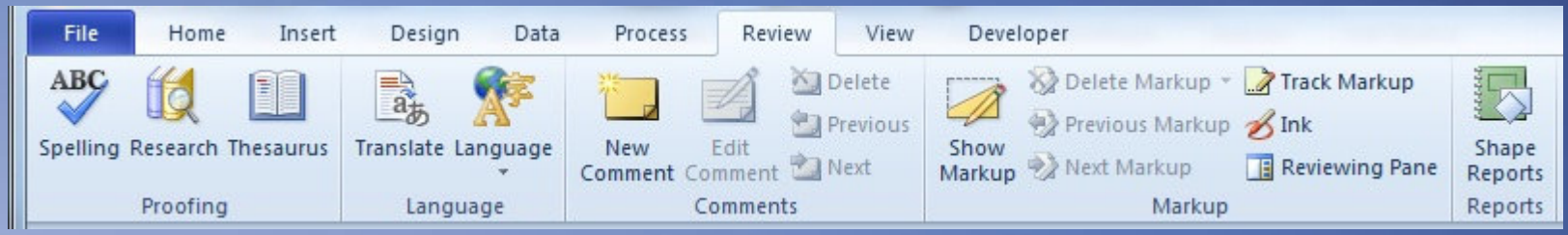
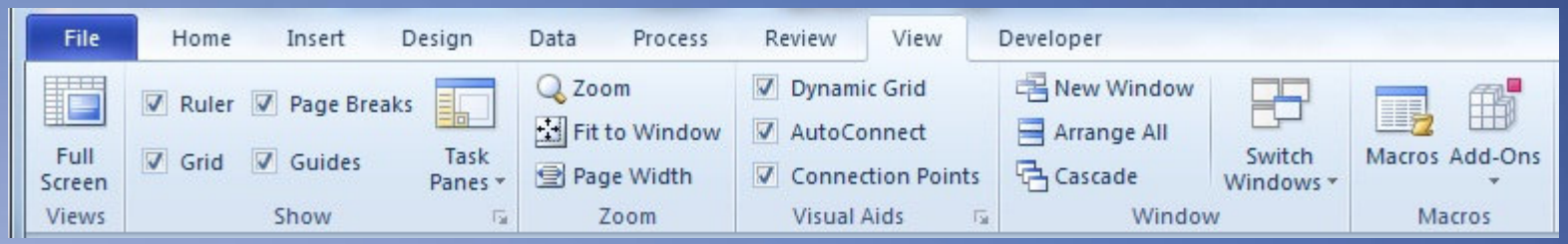
Review Tab



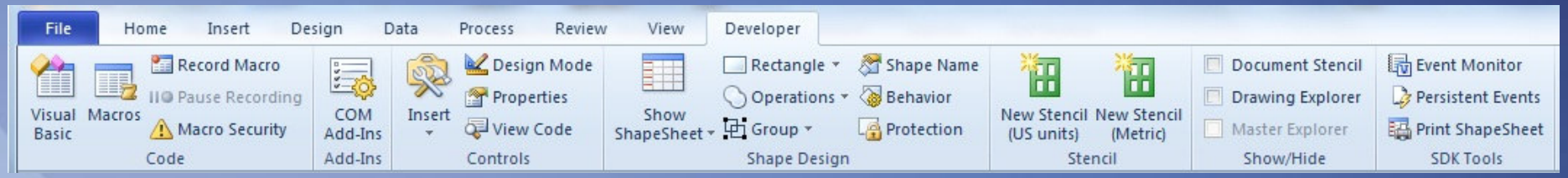
- Proofing
- Language
- Comments
- Markup
- Reports

View Tab



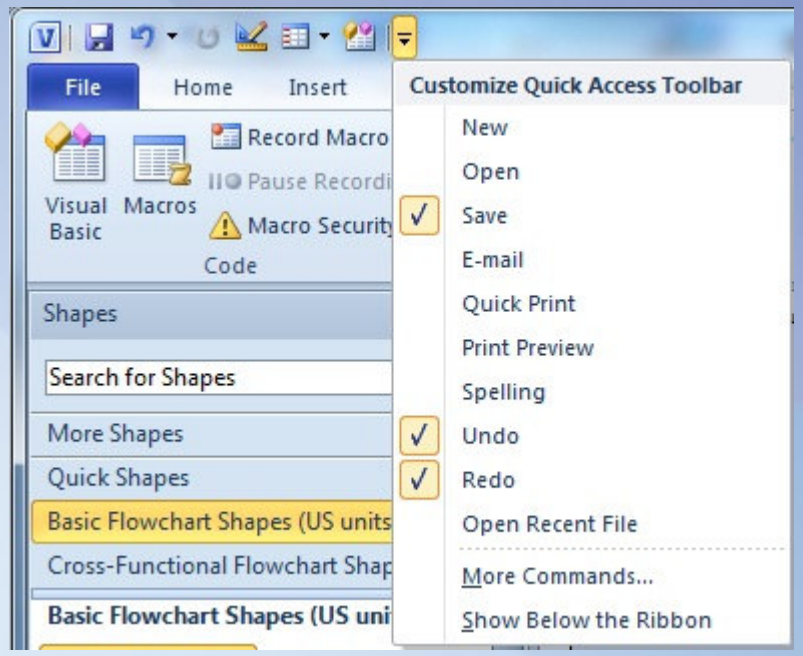
- Views
- Show
- Zoom
- Visual Aids
- Window
- Macros

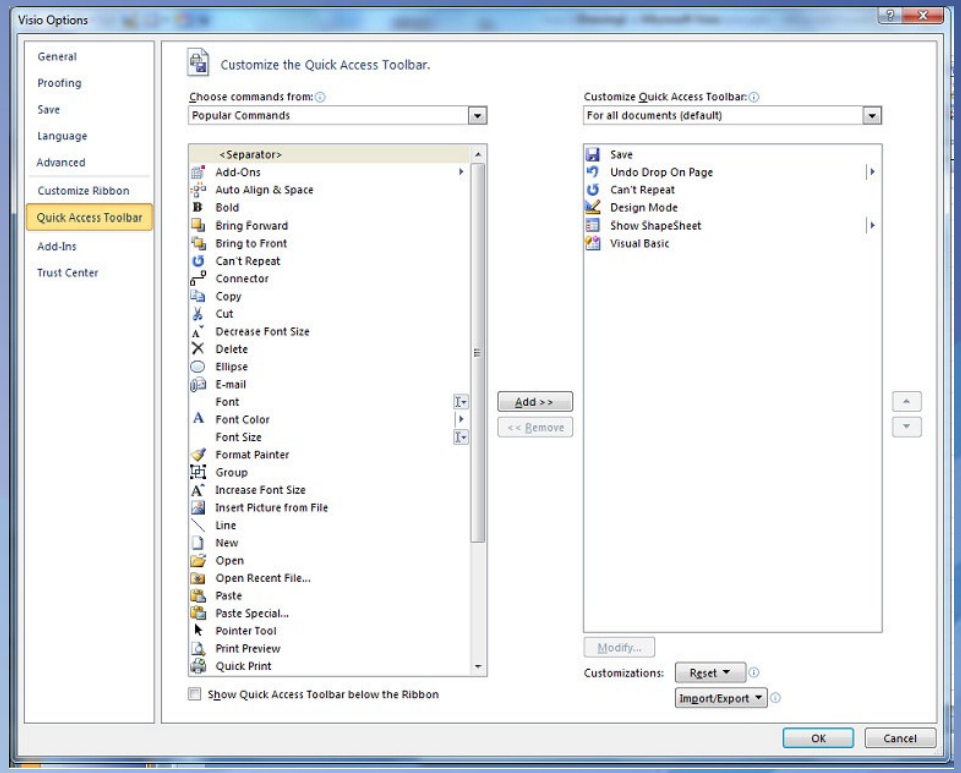
Developer Tab



- Code
- Add-Ins
- Controls
- Shape Design
- Stencil
- Show/Hide
- SDK Tools (only with Visio 2010 SDK Installed)

Quick Access Toolbar





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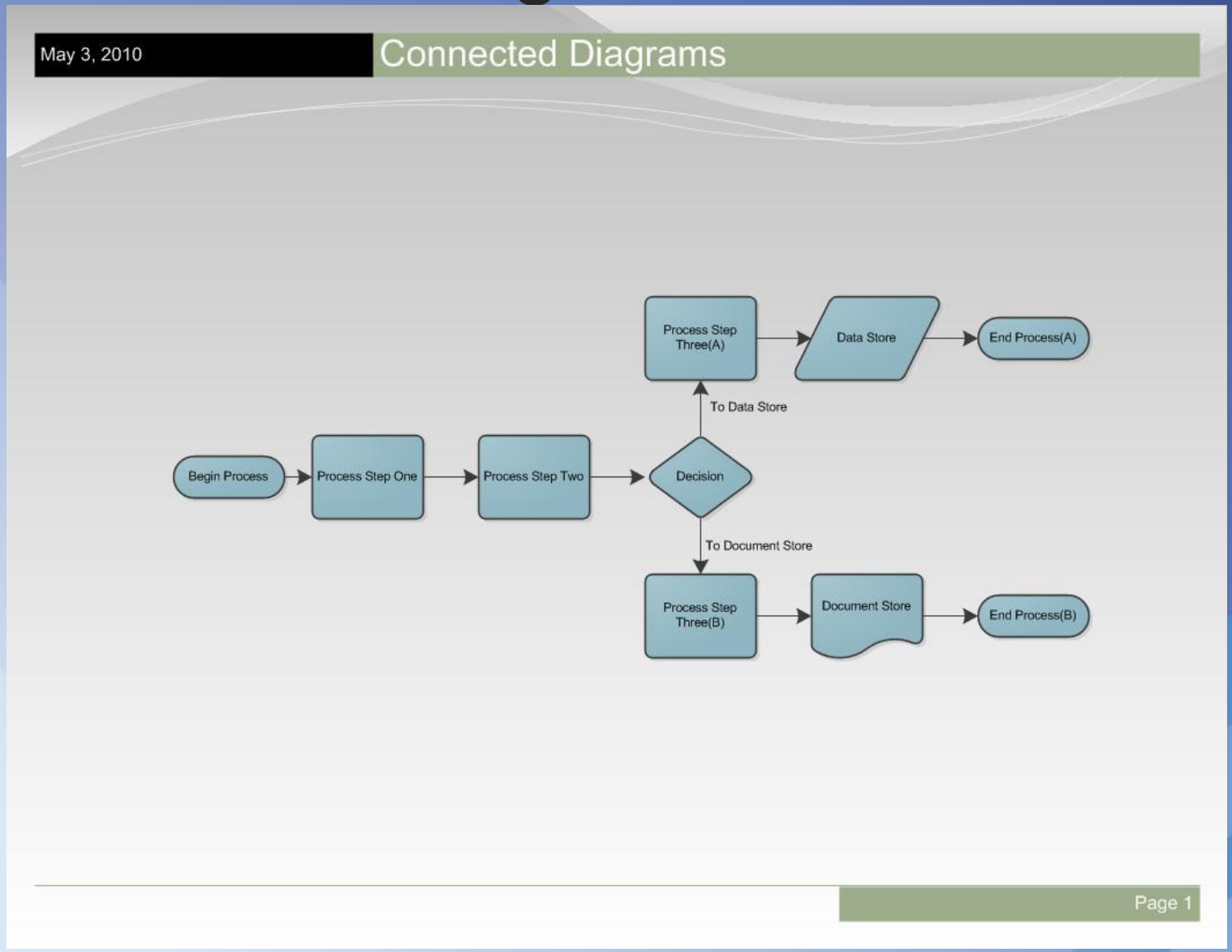
The Fluent UI (The Ribbon)

Connected Diagrams



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Connected Diagrams

- Methods of Connecting SmartShape® Symbols
  - ***Point to Point (commonly used method)***
  - ***Shape to Shape (Dynamic)***
    (Using the Dynamic Connector Tool)
  - ***Shape to Shape (2007)***
  - ***Shape to Shape (2010)***
    - ***Quick Pick at the Cursor***
    - ***Ordering Quick Pick SmartShapes on the Stencil***

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Methods of Connecting SmartShape Symbols

Connected Diagrams

- Dynamic Connectors
  - ***Right Angle Mode***
  - ***Straight Mode***
  - ***Curved Mode***
  - ***Adding and Bending Leg Segments***
  - ***Global Connector Changes (Design Tab)***

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Dynamic Connectors

Connected Diagrams

- Connection Points
  - ***Adding***
  - ***Relocating***
  - ***Deleting***
  - ***Connection Point Behavior/Visibility***

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Connection Points

Connected Diagrams

- Laying Out SmartShape Symbols in Connected Diagrams
  - ***Inserting SmartShape Symbols***
  - ***Deleting SmartShape Symbols***
  - ***Auto-Align and Space (Home Tab)***
  - ***Re-Layout Page (Design Tab)***
  - ***The Infinite Canvas***

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Laying Out SmartShape Symbols in Connected Diagrams

Connected Diagrams

- Containers and Subprocesses
  - ***Containers***
  - ***Subprocesses***

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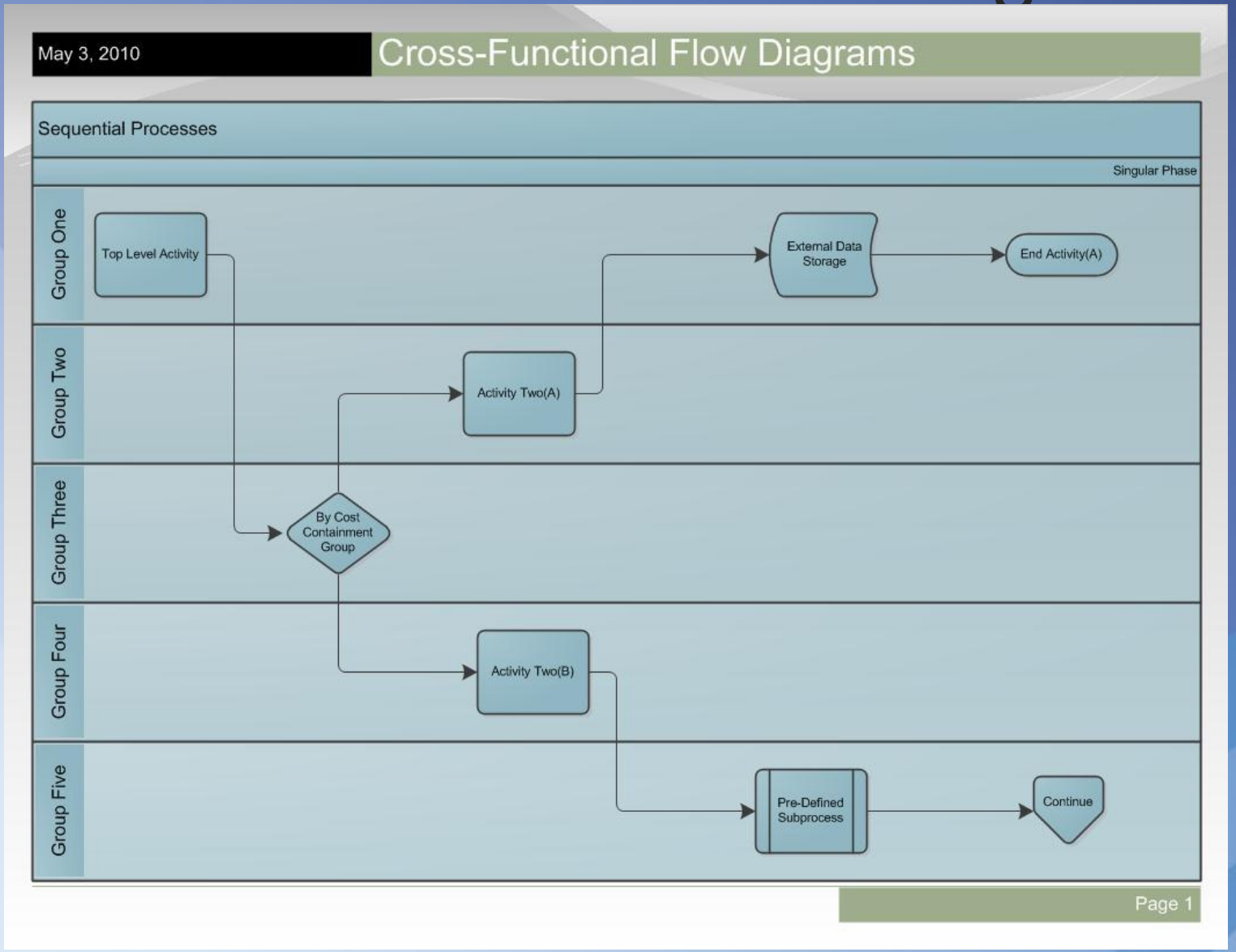
Containers and Subprocesses

Cross-Functional Flow Diagrams



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Cross-Functional Flow Diagrams

- Adding Swimlanes
- Swimlane Styles
- Adding SmartShape Symbols to Swimlanes
- Large Cross-Functional Process Flows
  - Extended Page Diagrams
  - Multi-Page Diagrams

Cross-Functional Flow Diagrams

- Adding Swimlanes

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Adding Swimlanes

Cross-Functional Flow Diagrams

- Swimlane Styles

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Swimlane Styles

Cross-Functional Flow Diagrams

- Adding SmartShape Symbols to Swimlanes

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Adding SmartShape Symbols to Swimlanes

Cross-Functional Flow Diagrams

- Large Cross-Functional Process Flows
  - Extended Page Diagrams
  - Multi-Page Diagrams

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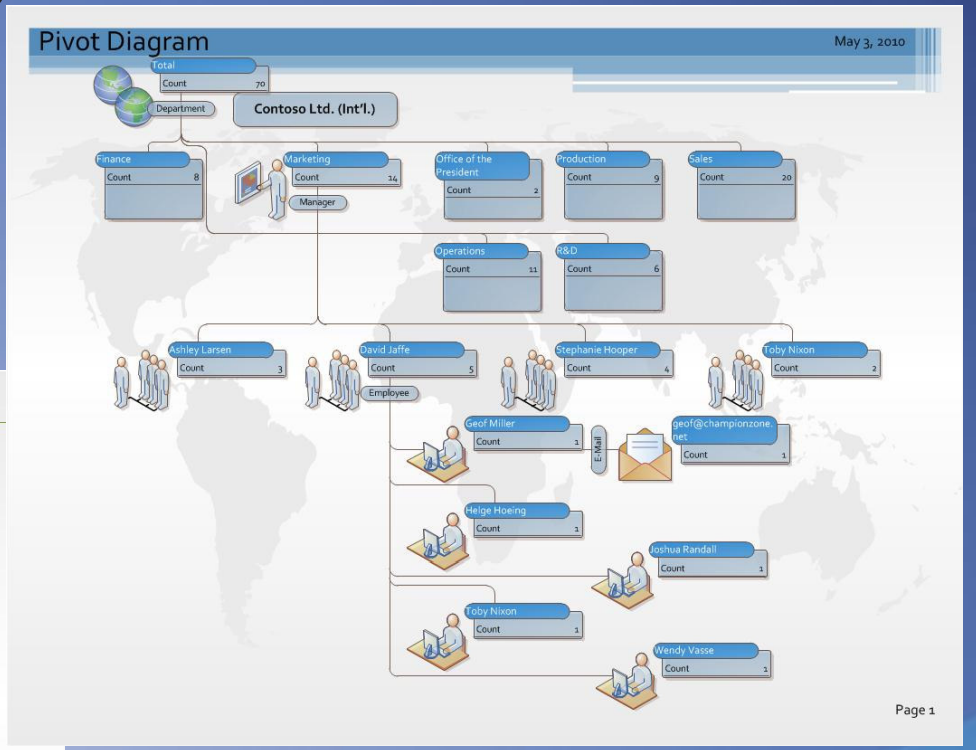
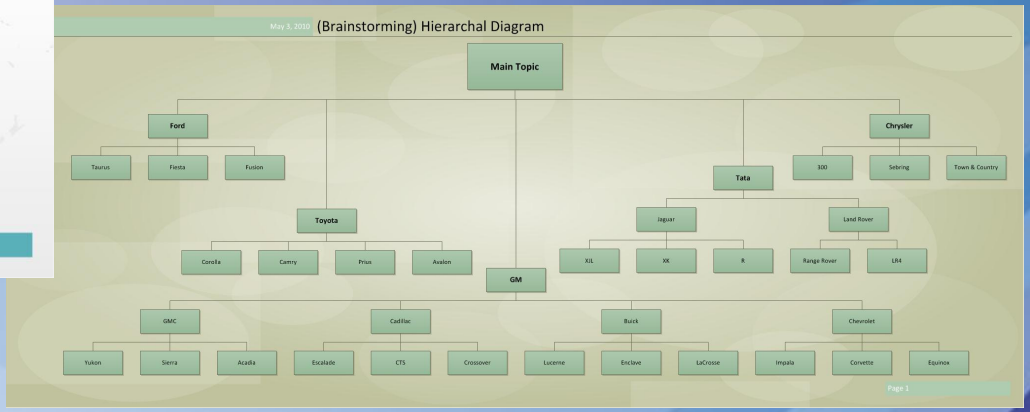
Large Cross-Functional Process Flows

Hierarchal Diagrams





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Hierarchal Diagrams

- Brainstorming Diagrams
- Organizational Diagrams
- Pivot Diagrams

Hierarchal Diagrams

- Brainstorming Diagrams

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Brainstorming Diagrams

Hierarchal Diagrams

- Organizational Diagrams

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Organizational Diagrams

Hierarchal Diagrams

- Pivot Diagrams

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Pivot Diagrams

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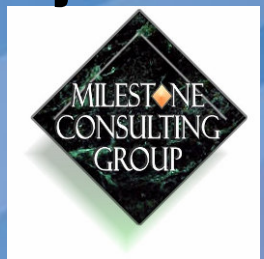

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Additional Resources

- The Visio Toolbox site
  http://www.visiotoolbox.com
- Visibility.biz
  http://www.visibility.biz

Downloadable Resources

- .PDF version of the Presentation Slides
- .PDF version of the 74+ page Tips & Techniques Handout
- .PDF version of the 108+ page Organizational Diagramming Handbook

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Go to http://www.visiotoolbox.com

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