

Microsoft Visio Tutorial for IBM Cloud Stencils

Installation & Setup

1. Set the location of local folders for Visio: File -> Options -> Advanced -> File Locations...
2. Create a folder named IBM Cloud in the local stencils folder.
3. Copy the vssx (Visio 2013) or vss (Visio 2010) files to the local stencils folder.
4. Create a folder named IBM Cloud in the local templates folder.
5. Copy the vstx (Visio 2013) or vst (Visio 2010) files to the local templates folder.
6. Customize default text font and color by going to the Developer tab -> Drawing Explorer -> Styles, right click on Normal -> Define Styles, select Change Text and change the text defaults such as Calibri 8pt Blue, then select Change Shape->Line and change the line defaults such as 2pt Width Blue.

Navigating Visio

Templates

1. Select one of the template files to bring up a fully editable diagram in Visio and delete any icons that you will not use along with any connecting lines.
2. Go to More Shapes in Visio, find the IBM Cloud stencils, and select the ones you want to use in your diagrams.
3. You can delete any icons that you are not using along with any connecting lines.

Snap & Glue

1. Snap & Glue is enabled by default and helps with aligning icons and drawing lines.
2. Disabling Snap & Glue allows precise icon placement when an icon won't go where you want it because of alignment.
3. To disable Snap & Glue, select Snap & Glue menu in the Quick Access Toolbar, uncheck Snap & Glue, select OK and exit Snap & Glue menu, put the icon where you want it, then go back and reenables Snap & Glue.
4. If you don't have Snap & Glue in the Quick Access Toolbar, go to File -> Options -> Quick Access Toolbar, search All Commands and add Snap & Glue to the Quick Access Toolbar.

Lines & Text

1. Lines are added between icons using the Connector under Tools.
2. Lines can have additional angles added either by holding the shift key and dragging to break out the midpoint of the line with four new right angles, or by holding the control key to create a single angle of an arbitrary degree at the midpoint.
3. Weight, color, and arrows of lines can be customized under Shape Styles.
4. Size and color of the icon text can be customized under Font.
5. Position of the icon text can be modified by selecting the Text Block (Shift+Ctrl+4) under Tools.

Adding Objects

Icons & Lines

1. Add an icon to your diagram and resize as desired.
2. Add text to the new icon by clicking on the icon and typing the text.
3. Customize the size and color of the text under Font.
4. To subscript or superscript, highlight the desired part of the text and press "Ctrl =" to make the highlighted text subscript or "Ctrl Shift =" to make the highlighted text superscript.
5. If any of the text wraps to next line, select text, select Text Block (Shift+Ctrl+4) under Tools, widen and reposition the text box. You can also move the text to other sides of the icon out of the way of lines. When done unselect the Text Block by selecting the Pointer Tool under Tools.
6. Add a line to the new icon by using the Connector under Tools.
7. Customize the weight and color of the line and add arrows under Shape Styles.
8. When done unselect the Connector by selecting the Pointer Tool under Tools.
9. If a line obstructs the text, select the text, right-click and select Font, select solid color of white for text background, and select Bring to Front.

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