

Visio 2021 Essential Training (Office 2021/LTSC)

Introduction

Create easy-to-understand visuals

If you've ever needed to create the perfect diagram, you likely know how time consuming and tedious it can be to draw them by hand. Well, that's where Visio can help. From simple drawings to connected diagrams, like workflows, flow charts and org charts, from floor plans to network diagrams. Really, any diagram you can imagine, Visio makes it possible to create them all with precision and ease. I'm David Rivers, and I've been showing people how to make the most of Microsoft Visio since its early days. Visio 2021 has evolved to become more powerful than ever, yet it continues to remain easy to use if you know the basics. So if you're new to Visio, this is the place to start. We'll cover the basics and more in this course to help you build a solid foundation of Visio knowledge to help you get started creating all kinds of diagrams.

What you need to know

Visio can be installed a number of different ways using a variety of different plans. In this course, we'll be covering Visio in the new standalone version of Office, released in fall 2021. Now, the commercial version, which is what I'll be working with in this course, is called Office LTSC, with LTSC standing for Long Term Servicing Channel. The consumer version is simply called Office 2021, including Visio 2021. Despite some user interface differences, these two versions are largely the same in how they work. That said, there are some features in LTSC that aren't included in the consumer version. Just know that when I cover these features in the course, I'll note any that aren't included in Visio 2021. Also, this course is designed for those who are new to any version of Visio and looking to begin with the basics of diagramming with the software. You won't need any experience whatsoever to easily follow along with me. Lastly, this course comes with exercise files. If you have access to them, you'll be able to follow along with me step by step as we move through the chapters and movies in this course. So if you do plan on using them, I highly recommend placing them in a convenient location, such as on the desktop. If you don't have access to the exercise files, not to worry. You can learn lots by following along with your own files, or by simply sitting back, relaxing, and watching.

1. Getting started

What is Visio 2021?

Just before we start working with Visio, let's take a quick look at what Visio is and how people are using it. Simply put Visio is a software application for creating diagrams. These diagrams quite often relate to data and Visio can be used to create a way to visualize that data graphically. Diagrams can be anything from simple flow charts and floor plans to detailed network prototype and pivot diagrams. And because Visio comes with a large number of templates built in shapes, objects, and stencils, you can create very impressive diagrams quickly and easily. So who is going to use an application like Visio? Well, Visio has typically been used by enterprise clients at the corporate level and has been considered to be an application for creating serious diagrams. IT professionals might use it for networking diagrams, space planners for floor plans. Graphic designers might use it for a wide variety of diagrams like work charts, timelines, calendars, and more, and even engineers might use Visio to create prototypes using wire frames for example. Of course the average home user could also create some cool diagrams using Visio that would apply to non work-related scenarios. How about planning a backyard or landscaping? How about furniture placement or even a simple map with directions would be popular examples of how Visio might be used at home. Now once you start using Visio, you'll get a better feel for some of the things you can create with this powerful software. So let's get started.

Open files and adjust the UI

It's time now to launch Visio, open up a diagram, and get comfortable in our Visio environment. Here in Windows, we can launch Visio different ways. You might have a shortcut on your desktop, which you can double-click, or like me, come down to the Start button here. With one click, we get access to an alphabetical listing of any of the apps installed, including under the V, Visio. One click here will launch Visio and take you directly to your home page. Now from home, which is selected up here in the top left corner, we can create new drawings or diagrams using some of the templates we see here. If you don't see a template you want, you can access a link to more templates from this area on the right-hand side. Also, as we begin to work with Visio, any of the drawings or diagrams we create will appear on our recent list, so we can come here to get back to them quickly. If there are certain files you come back to on a regular basis, you can also pin them, and clicking the pin tab will give you access to any pinned files, so you don't have to go searching for them, instead you'll access them very quickly and easily from here. But you'll also see New and Open over here on the left-hand side, and clicking New allows us to create new diagrams and drawings, accessing many more visible templates from here. And you can see we can also go to categories of templates and use a search field to search online for hundreds of templates. There are many different types of drawings we can create here in Visio, and you have access to suggested searches and anything you want to type in the search field to narrow it down. But we're going to open an existing file, so let's go to Open. Clicking here gives us access to any sites we might be connected to. If you're logged in to your Microsoft account, you'll

see your credentials up here at the top of the screen. I'm logged in using a business environment. You can see some of my credentials as I hover over here. Now, if you're not logged in, you'll see a sign-in link you can click to get signed in, and then the list you see over here on the left-hand side will obviously look different than mine, but my company has provided OneDrive for business, as well as a SharePoint site that I can access. So these are cloud locations where I can share files for example. But I can also access anything that's on my own computer using This PC or Browse. So if you've downloaded the exercise files, perhaps to a convenient location, like the desktop, clicking browse will allow you to go and find those files. I did put mine on the desktop, so clicking Desktop gives me access to the exercise files folder, double-clicking this reveals the sub-folders for each of the chapters in this course. And we're going to the Chapter1 sub-folder, double-click that to see the only file in that folder. R30_Onboarding_0102 is the file we want. Click it once to select it and click open, or double-click it if you prefer. This will open up the drawing the way it was left when it was last saved. And as you can see, it is a basic workflow. It's very difficult to read at this zoom level, but there are certain settings that you'll want to know about. First of all, in the bottom right-hand corner is where we find the zoom slider. You'll see this in other Microsoft apps as well. The plus sign allows us to zoom in at increments of 10%. The minus sign will zoom us back out. And we can also move the slider by clicking and dragging it. To the right we zoom in, to the left we zoom out. And you'll see the zoom level here on the right-hand side. So when zoomed in, we'll probably need the scroll bars on the right to scroll up and down, and depending on the width, you may need to scroll left to right. Now we're able to see what's on the page and even work on this drawing if we needed to. Another option, though, to get a feel for the layout of your drawings is to go down just to the right of the zoom slider, you'll see this little button, Fit page to current window. Click that and it'll take you right back out to the exact zoom level that allows you to see the entire page and get a feel for the layout. Not ideal for working on the diagram, but it does give us a good look at the layout. Over here on the left-hand side, based on the type of drawing you're creating, in this case a workflow, you'll see different shapes and categories. When we go to basic flow chart shapes, you can see them down below. These all pertain to creating flow charts, and this is called a stencil. You can think back to the days of that plastic sheet, where you outlined the different shapes from a stencil on your page using a pencil. Now we simply take these shapes and drag them onto our page, much faster and easier. We can get access to the shapes that go with this type of drawing, a flow chart, or go to more shapes where we have access to all of the shapes available to us in Visio. You can see different categories for business, engineering, there's flow chart there, and you can see what's checked off. That's currently visible in the shapes pane on the left, but we can add additional stencils if we wanted to. So keep that in mind as we continue to work with Visio. Click in the background to close up any menus. Other things you'll want to ensure are enabled for our view is this ruler we see across the top and down the left-hand side. Go up to the ribbon tab labeled View and click that. Here you'll want to make sure ruler is checked off. The ruler is going to help us with lining things up on our page. We also want guides to be enabled. Guides will help us get things lined up and spaced as well. So make sure those are checked off, and next, we'll go up to File. Then go down to Options at the very bottom, click there. And from here, we'll go to Advanced. From Advanced we'll scroll down to Display. And from here, there are certain things we also want to have enabled, for example, Screen Tips. You can see Shape window Screen Tips and Other Screen Tips are checked off. If yours aren't, make sure they are, that'll help us as we're learning what the different shapes mean when creating a drawing. And now go back up to General, and click there, and make sure that Enable Live Preview is turned on. Same thing in the Shape window. This is going to allow us to get a preview of a selection before we make it. If those are all enabled, go ahead and click Ok to close that up. And now you should be feeling a little more comfortable in your Visio environment. To close up this file, we can go to the close button just below the title bar. We don't want to close up Visio, just this file. Go ahead and click the close window button to close it up and we're ready to continue.

2. Creating connected diagrams

Add a shape and save

Let's turn now to create our first diagram or drawing here in Visio. And whether you have something open or nothing at all like me, to create a new file, we go to the file tab up here on the ribbon in the top left corner and select new. Now from here, we have some options at the very top for basic blank and basic flow chart drawings, but down below, you can see under Office, there are a number of templates that appear as selected or suggested templates. Also you'll notice categories. Click there to see the different categories of templates you can choose from. If you're looking for business related ones, engineering, there's flow chart. We can go to a category of those types of templates by simply selecting the tile, so let's click flow chart, which gives us a number of different flow charting options. For our purposes in recreating what we saw in the previous chapter, that sample flow chart flowing from top to bottom, that's a basic flow chart, so with it selected, go ahead and click basic flow chart. Gives us some options now, we can start with a blank page. What we'll get though, by choosing this option, are basic flow chart shapes and stencils down the left-hand side. If you see something that's close to what you want to create, you can get a headstart by choosing one of these options that also include, you can see color schemes, which are part of themes, so formatting

already applied. But to start from scratch, we're going to go up to basic flow chart, the blank page here on the top left corner, go ahead and click that. And with US units selected click create. So here's our blank page, and as you can see, it's eight and a half inches tall, 11 inches wide, that means the orientation is set by default to landscape. We want to turn it on its side so we can create a vertical flow chart, so the first step is to go up to the design tab here on the ribbon, click design and in the left corner here, you'll see in the page setup group, an orientation dropdown button, clicking that gives us the other option, portrait, go ahead and select it. Now you can see that it's eight and a half inches wide at the top, 11 inches long,, exactly what we need. Now we're ready to start adding the shapes to our blank page. And you'll notice over here on the left-hand side in the shapes pane, we're getting basic flow chart shapes because of the template we chose. Notice that basic flow chart shapes includes a number of different shapes at the top, commonly used ones and others down below. There's another stencil here called cross-functional flow chart shapes, and if you want to combination of the two, you can go to quick shapes. Here, you'll see more commonly used basic shapes, along with those cross-functional down below. And if you're looking for a shape that's not included in any of those, you can always go to more shapes to get access to every single shape available to us here in Visio. I think we'll see everything we need by going back to basic flow chart shapes, go ahead and click that. Now, to get shapes on the page, we simply click and drag them. For example, we want to start off our employee onboarding process, by having people fill out a form, so notice down below, there is a start/end shape, and as we hover over this, you're going to see a tool tip pop up, indicating that this represents the beginning, or it could also be the end of a program flow. So let's click and drag it onto the blank page. You're going to see some guides popping up depending where you move this. For example, move it towards the center horizontally, and you'll see that guide down the center appear in it actually snaps to it, to hold it in place. And you'll also notice on the ruler as we move our shape around, there are little guides, dotted lines moving across the top, and up and down, down the left-hand side on that ruler as well to help us line this up perfectly. So we'll go back to the center horizontally, and we'll drag this up until the top marker on the left-hand ruler hits the nine inch mark. That means the top of our shape will be at the nine inch mark and release. Click in the background and we have our first shape added. Now the next step will involve a decision, as to whether the form is filled out correctly and approved, or needs adjustments, so let's go to a decision shape here, click and drag it onto the page, and look what happens when we move underneath the first shape. We see those alignment guide showing us that it's the exact same width, it's lined up perfectly right now, and as we move up, you're even going to see some spacing options, so if you want things evenly spaced those spacing arrows at you see pointing up and down will help with that as well. We need a little extra space, so let's just drag that down and looking at the ruler on the left, notice the guides for the top center and bottom of our shape, let's get the top lined up at the seven inch mark and release. Click in the background, and we have our first two shapes. Now we could continue adding shapes all we want, and then adding the connectors ourselves, or we can use SmartShapes, which we're going to explore in the next movie, after we save what we've done so far, let's go back up to the file tab in the top left corner, click there, and choose, save. Next, we're going to save this to the desktop. So if you see desktop, click it, if not, you can browse to it, and let's give it a name. Notice the extension is .vsdx. You might not be seeing extensions, depends on how you have Windows File Explorer set up to display it or not, but that is the default extension, we can type right over the file name, drawing and whatever number you see there, with the extension, we're going to type in R30, let's use an underscore instead of a space, and then onboarding, and forget the extension you don't have to type it in, it's automatically going to be saved as a Visio drawing, when you click save. And now you'll see the name up here on the title bar. So we have our first drawing, and we're ready to add more shapes, but there is another faster and easier way to add shapes that automatically get connected, we'll explore that next.

Use SmartShapes

As you continue to add shapes to your diagram here in Visio, you're going to find that most of the shapes you add to a diagram are what we call Smart Shapes. They're called that because they have intelligence built in that allows us to connect them to other shapes automatically. We're going to explore them in this movie with R30 Onboarding Diagram 0202 if you're catching up. Let's start by zooming into our two shapes that we've already added. Down below here on the slider, we can drag the button to the right until we get up to, say, 67%. And we'll scroll just slightly so that we can see both of our shapes here on the page. Now, from here, we're going to start adding shapes from the Shapes panel over here on the left-hand side. As we do it, we have a couple of options. One, if we wanted to, we could go to a shape like a process shape here, click and drag it on top of the shape we want to connect it to, and just wait for those little arrows to appear around the outside, you can see them there. So once they appear, we can then move over to the arrow itself and release. What you're going to find is it's automatically spaced and lined up with a connector. And if we click in the background, you'll see that the arrow is pointing in the right direction. Now, the other way, which is even faster, is to hover over the shape that we want to add another shape to. Looking over here to the left, check out the top four shapes in the panel. And by the way, we can rearrange which shapes appear up here on the top four, and that's important, and we'll do it later because when we hover over a shape, like our process shape here, let's say this is one of the steps after we make a decision, you'll see arrows appearing around

the outside. And if we wanted to, say, add another step to our process down below, we simply move to the arrow pointing down, and look what happens. Four options appear in a rectangle representing those top four shapes that we see on the left-hand side in our Shapes panel. So if we wanted another process step, we simply click it, and it gets added to the bottom of the current shape, automatically connected, with the arrow pointing in the right direction. Just click in the background to see that. Now, what if you want to add a shape that's not in the top four? Well, we know that we can go over here and grab a shape like, let's say, a database shape and drag it onto the page. Now, if you don't hover over an actual shape, you won't see those arrows, but you will see alignment guides showing up all over the place to help us line things up perfectly. So let's add the database without connecting it, and we'll talk about how to manually connect shapes later on. We'll just release it down below that shape. And now, that is a smart shape with its own arrows around the outside. So we'll go to the left-hand side, for example. And here, we'll add a shape that represents the end of the process. That's our start/end shape down at the bottom of those four. Go ahead and select it. All right, let's go back up to our decision shape here now, and let's say we wanted to add something to this. Well, we're going to add another Smart Shape to our decision shape up here to the left, so we'll go to that arrow on the left, and we'll add another step, so process step, which is our first shape, go ahead and select it. And here's another reason that these are called Smart Shapes. If we move them around, they stay connected. So we can click from the center of our shape. Let's say we want to drag it down and line it up with the step that we see on the right-hand side a little bit lower. You can see those alignment guides and spacing guides show up. And when you release, notice that the connector is still there. Click in the background. You'll see the arrow is still pointing in the right direction, but it never lost its connection, so that makes it smart, and makes drawing here in Visio a lot faster and a lot easier.

Arrange top SmartShapes on a stencil

When adding automatically connected shapes to other shapes in our diagram by using those connection arrows that appear, we automatically see the top four shapes that appear in the stencil. If any of these shapes are shapes you never use, and there are others that you do use more often, you can rearrange the stencil, which will automatically update those options you see on the page. Let's give it a try here as we continue working with our R30 Onboarding diagram, Onboarding 0203 if you're catching up. For example, here on the left-hand side, under basic flowchart shapes, we see process, decision, start/end, and sub-process, maybe we don't use sub-process and instead data would be a better option. Well, all we have to do is move these around here in the stencil, and we'll see it updated automatically. Let's click and drag data to the left of sub-process. You'll see a gray line appear just to the left of that shape, and release. Now we can bring start/end up to the left of sub process and release it. Our top four now appear as process, decision, start/end, and data. So that means if we go to our drawing and just scroll up a little bit, let's say there is an additional step in between the start and our decision and it involves data. Well, in that case, we can hover over our start/end shape here at the top, go to the lower arrow and look at the top four options we get to pick from now, process, decision, there's data, and the start/end shape. We want this data shape. So go ahead and select it and it gets added. You can see the way it gets added, but it is connected. Click in the background. You can see the connector with the arrow going in the right direction. We can rearrange things all we want, they are smart shapes. Let's drag this data shape so it's in line with the others. And we'll have it spaced nicely between the top start/end shape, and where we're dragging, when we see that double arrow pointing up and down on the right-hand side, release. Just click in the background, still connected, but we have the shapes that we use most often because we went over here to the stencil to rearrange them, knowing that these are the shapes we use more often than some of the others that might be appearing when you hover over those arrows. Now you know how to customize it to suit your own needs.

Connect shapes manually

We know how fast and easy it is to connect shapes by creating new shapes from existing shapes. But there will be times when you've added shapes to your page that are not connected. You'll need to know how to connect them manually, which is what we're going to do in this movie with our R30 onboarding diagram, R30 onboarding 0204, if you're catching up. Here you can see we do have, for example, a data shape that is not connected to anything below. After this decision shape we do have a process that needs to come back to the decision. So, we do have a few manual connections to make, and to do that we need the connector tool. Click the home tab on the ribbon, and go to the tools group here, you'll see the connector tool. The keyboard shortcut is control 3, if you prefer that option. Go ahead and click it though. And now when you move your mouse pointer onto the page, you can see it looks different. Now has that connector icon attached to it. And all we have to do is move to the shape we want to connect from, and drag to the shape we want to connect to. But there are a couple of options. For example, when we go to our data shape here, and just go into the center of it, you can see that green border going all the way around. If we click and drag to the decision shape down below from here, automatically, Visio will create the connection in the best available connector point. And if we move things around, it could shift around. If you want to ensure that it always connects to a specific point, just move your mouse pointer to that point, for example the one down below. Now you can see it's the connection point that's highlighted, not the entire shape. And we're going to click and drag from there.

So hold down your mouse button, and drag straight down to the connector point at the top of the decision point down below. As you can see it's a glued connection. That means it's going to stay connected there, even if we were to move the shapes around. So when you release, you've created your connector, and you can click in the background to deselect to see that we have the correct direction going, and it will be glued to those points, because we chose to connect from point to point, as opposed to shape to shape. All right, let's add a couple more now. Let's go down to our process shape here, and let's go down to the bottom point, and click and drag from there to the bottom point of the decision shape right above here and release. Going to be glued to that connection. So this is going to come back here, and then either go left or right again. And, you can see there's one left here, and that's the process shape down to the database. Let's go right from the shape this time in the center, and drag down to the shape, the database shape, below, and release. So it'll be connected, but because we went from shape to shape, if we move things around, the connection points can change, as opposed to being glued to those specific points. Click in the background to deselect. All right, we have everything connected, it's time to go back to the pointer tool now, so when we go back to the tools group on the ribbon and click pointer tool, and move on to the page you can see we've lost that connector icon, and we're ready to continue with our drawing. The next step might be to put some labels on these shapes, and connectors. We'll do that next.

Label shapes and connectors

When creating a diagram, like our onboarding process flow chart that we've been building, we currently have a number of shapes and connectors, but they really don't mean anything until we start adding labels. You can do that as you add the shape. So add a shape and just start typing in. Or like we've done, get the shapes in there, get them connected and then go back in, add the labels. That's what we're going to do with our R30 onboarding diagram 0205 if you're catching up. We can click a shape or double-click a shape. When you click a shape like our top shape here, which is our start/end shape, go ahead and select it. You can see with it selected, there are handles around the outside. All we have to do now is start typing. And for this one, it's the onboarding start, so let's type that and look what happens. As we start to type, we're automatically zoomed in. So we'll type in onboarding start, all fits on one line. Now look what happens when we click in the background. It's locked in, and we're zoomed out. Let's say we want to add a label now to the next shape, which is our data shape, online form submitted. Let's double-click this time. Double-clicking zooms us in, and we're ready to type. So it's really up to you how you like to add your labels. Let's type online form submitted. Notice we run out of room here. So we're wrapped around to the next line, but everything fits nicely inside the shape. Now we don't have to click outside to lock it in. And instead, we can go right to the next shape and select it, like our decision shape here. Now here, there's an accuracy check that happens, so let's type that in. And we can just type without double-clicking, accuracy check. Like so. Now we'll go to the process shape over here to the right and click there. So if we go to the right, that means that everything's approved, and we get management sign-off, so we'll type that in. I'm going to go with sign dash off, like so. Okay. We can use the scroll bar now to scroll down to see the remaining shapes. And we'll add some labels there as well. On the other side of the accuracy check, if there are corrections that need to be requested, the employee will perform the requested edits. So we'll select that shape and type in employee performs requested edits. Let's go to the process shape over to the right now underneath the management sign-off. Here we have the HR preparing the employee workspace, so HR prepares employee workspace. Down to the database shape, we select it or double-click, employee added to database. And at the end, we have our start/end shape once more now. Here is where the employee is hired, so we'll type that in, employee hired. Now click in the background. Notice we don't zoom back out here, because we've gone from one shape to the next. So if we wanted to, we can use our zoom slider to zoom out to get a good feel for the layout. I'm going to bring it down to around 60%, 63. Scroll up, so we can see all of our shapes. Now what we don't have our labels on any of the connectors. For example, with the accuracy check, things happen here, either it's approved and goes to the right side, or corrections are requested, and it goes to the left side and comes back for another accuracy check. So we need to label those. And just like with shapes, we select the connector. Let's go to the one on the left side of accuracy check and select it. You can see how it's highlighted with selection handles. We'll type in corrections requested. So we zoom back in, you can see the label. And when we click in the background or zoom back out, but we now have that labeled. Now we have a tiny little one here. So we're going to click the connector, going to the right of accuracy check and just type in approved. And click in the background. You can see it takes up the entire line. So we might want to start moving things around and readjusting. For example, let's go to the connector here on the left side. And let's go to the center handle, that yellow handle, and click and drag it over to the right and up. You can see that moves a label, but it really doesn't make sense unless we move the connector as well. It has its own handles, such as the one we see in the center, which we can click and drag to move it over to the left, and that makes more sense. And now we can go back to that yellow handle for the label and drag it back down onto the connector. We can move it there, or we can move it over to the left. That probably makes more sense. Over here on the right-hand side, what we might want to do is start moving these down so that we have more room for the manager sign-off connector. So let's go to the bottom shape and just drag it down a little bit. You can see everything stays connected. Now we're going to go to the database shape and drag it

down. Look at all the guides showing up showing us the spacing and the alignment. You can see once we get the centers aligned there with the spacing, it's a good point to let go. Now we can drag our process shape right above that and down till we see that double arrow on the right-hand side showing us that we have good spacing. And we'll do the same now with the manager sign-off, just drag it down until we see the correct spacing show up. And our connector can now be moved. So we'll go to the connector and select it. And let's go to one of the handles here and just drag it up and over and get it reconnected to the manager sign-off. Click in the background, and you can see that looks a little bit easier to read and makes more sense. Just a cleaner looking diagram. And with the labels on our shapes and our connectors, we know exactly what's going on in our workflow. So labels can be done by adding them to the shapes as you add the shapes to the page. So adding a new shape and just typing will get it labeled. Or you can do what we did, click a shape and start typing or double-click to get inside and zoomed in to type in exactly what's going on in your diagram.

Add, remove, and change connected SmartShapes

When creating a diagram, such as our workflow here, there may be times when you need to go back and add additional shapes right in the middle of the process, or remove shapes, maybe even change a shape. These are things we're going to do in this movie with our R30 onboarding diagram 0206 if you're catching up. I'm going to start by sliding the zoom slider in the bottom right corner here to 100% so we can zoom in and see what we're doing. Let's say we needed to add a step between the management sign off and where HR prepares the employee workspace. Well to do that, it's as simple as clicking and dragging the shape in between those to the connector. Watch what happens when we go to the process shape over here in our shapes pane and drag it to the right and go right in between. You can see in the background that connector is highlighted, so when we release, it's added, the connections are maintained at the beginning and after the new shape. Click in the background to see that. All we have to do now is label our shape. But what happens when you need to remove a shape? Maybe we decided, no, we don't need this extra step. Well, we select the shape and hit your delete key on the keyboard. That'll remove it and recreate the connection between the previous two shapes. Now we may have some adjusting to do and clicking and dragging our HR preparation shape up here until we see that spacing arrow appear on the right-hand side, and then scroll down a little bit and do the same with our employee added to database. We'll drag it up until we see the correct spacing and release, and that means our employee hired shape can also be moved. Now we can select multiple shapes and move them altogether as well. But this is an easy way to get things lined up using those virtual guides that appear for spacing and alignment. That looks good. What about changing a shape? As we scroll up, perhaps the online form submitted, which is currently set as a data shape, maybe there is a paper form as well. In that case, this could be a document shape. So let's go to the shape and select it. Now with the home tab selected up here on the ribbon, we're going to go all the way to the right-hand side. You'll find a change shape drop down, go ahead and click it to see the shapes we can change too. And there's our document shape. You can see as we hover over these, we get a live preview of what's going to appear on our page. So we'll go to the document, click it and click in the background, easy as that. So when you need to add, remove, or even change a shape, just simply selecting the shape, deleting it, dragging the shape onto a connector to add it, or using the change shape button to change a selected shape to something else.

Auto-align and space SmartShapes

Alignment and spacing guides offer an excellent way to keep your diagram consistently spaced and in alignment. Here, if we go to the View tab on the ribbon and see that Guides are selected, we know that when we move things around, the guides will show up to help us with spacing and alignment. But what happens if they're not turned on or perhaps someone else has edited your diagram, perhaps you've needed to add or remove additional shapes and things are no longer in alignment. That's what we're going to explore in this movie with our R30 onboarding diagram, 0207 if you're catching up. Let's start by zooming out to view the entire page. This little button near the bottom right-hand corner, fit page to current window, allows us to see a nice bird's eye view of the layout of our diagram. So, let's go to the top shape here, click to select it, and then with the four-sided arrow, we'll move it up a little bit higher. We'll move this document in the middle by clicking and dragging it a little bit to the left. And down here, one of our process shapes, like the second one on the right-hand side, we can drag out to the right, and we'll drag this process shape on the left a little further left, and click in the background to de-select. So, this is no longer looking organized. It's not spaced out evenly, it's not in alignment. We could go back to our View tab on the ribbon, make sure we turn on Guides, and start moving things around ourself. But there is a faster and easier way which we're going to explore right now. First of all, we can select shapes that we want to line up by clicking and dragging around them. It's called a Marquee Select. And when we do that, we can work on just those selected shapes. Let's go back to the Home tab on the ribbon and click that. And over here in the Arrange group, you're going to see an Align dropdown. When you click this and hover over the options down below, you'll get a real-time preview of what you can expect. For example, if we wanted to line those up on their rights, we can go down to Align Right and see that the alignment looks pretty good. The spacing may not be perfect, but the alignment will be. On their left looks pretty good as well, even on the center, just moves 'em slightly. There's

also something called Auto Align, which will automatically adjust things for you. You can see what that looks like in the background. There's also a Position option. Let's go to the background of our page, click, and then click again to de-select, so nothing is selected, and go to the Position drop down. From here you'll see some options at the top to automatically space out all of the shapes in your diagram. Then, right below that, Auto Align & Space will do two things, automatically align and space things out. Now it may not be exactly what we had, but as you can see in the background, if we were to choose Auto Align & Space, this is going to look a lot more organized than it did before we came to this menu. Go to the background and see what that looks like, and move back to the menu to Auto Align & Space. So we'll go with that option, give it a click, everything's automatically aligned and spaced, so it's a little bit easier to understand and read. Now let's Marquee Select the entire thing by going to the top left corner, above the top shape and further out to the left than the most left-hand shape. Click and drag around all of our shapes, and you can see now we can go to the border here with that four-sided arrow showing up, we can click and drag this down onto our page and put it exactly where we want. For example, closer to the middle. Kind of like it right about there. You can use the ruler to see where you're moving things, click in the background, and that looks a lot better. So it is easier to understand when it's perfectly spaced and in alignment and to do it quickly, we have the arrange options we see here for aligning and positioning our objects on our page quickly and easily.

Rearrange connected diagrams

When you create drawings here in Visio 2021 using the blank page option to start from scratch, you can use those alignment guides that we've already explored to add shapes and have them lined up with one another and spaced out nicely. We also have the align and position tools at our disposal to help after the fact. But did you know that most of the templates also come with preset layouts to choose from? You can choose them at the beginning or apply them after the fact like we're going to do with our R30 onboarding diagram we've been working on - 0208, if you're catching up. Here, we're looking at the entire page, thanks to this little button in the bottom right-hand corner, fit page to current window. It's not something we would use to start adding and labeling shapes and connectors, but it does allow us to get a feel for the layout. So this is a pretty good layout, but there are some presets we can explore as well. We do that by going to the design tab on the ribbon, click there and move way off to the right to the layout group. You'll see a Re-Layout page drop down button, give it a click. Now there are different categories here for different types of diagrams. We're working on a flow chart. So the very top section gives us some options for flowing from the top down, from the bottom up, left to right, and right to left. And we can hover over these to get a nice little preview in real time of what that might look like, should we select it. Look at top to bottom. That's nicely spaced out. You can see everything's in alignment. If you want it to go in the opposite direction from bottom to top, you just hover over that to take a peak. If we were to go left to right or even right to left, you can see there's dotted lines representing page breaks. We'd need more pages using the current layout. That means using an eight and a half by 11 sheet of paper in portrait orientation. It's not wide enough. So we would probably want to change the orientation to have it fit, and then one of these might be a good option. But for our current page setup, we'll go back to the very first one here, which is top to bottom. Now, before we click this to apply it, notice down below there's a hierarchy section, which would be ideal for working with types of drawings, like an org chart, for example. There's compact tree down below for working with multiple shapes, radial, circular, and then you'll see more layout options down below where you can get even more specific, but we're simply going to go with this preset right here at the top under flow chart, top to bottom, go ahead and click. And everything is re-laid out. So things are nicely lined up. They're spaced out properly. We have very little, if any, adjustments to make using one of these preset layouts that come with many of the templates here in Visio 2021.

3. Adding Additional Objects to Diagrams

Insert a text box

Adding objects like shapes and connectors to a Visio drawing is as simple as selecting them and dragging them from the Shapes pane over onto the page. And then to add text to an object, we simply click it and start typing. But there are other types of objects we might want to add to a page. For example, we might want to give this diagram a title. That would involve adding some text, but not in a shape necessarily. So we're going to explore adding additional objects, like a text box in this movie with our onboarding diagram, R30_Onboarding0301 from the Chapter 3 folder of your exercise files if you're catching up. We're going to start by zooming in so we can focus on the top area of our page. Go down to the zoom slider if you need to and click around the middle here, you should get to 100%. This is the actual size. Now we'll use the scroll bar on the right here, click and drag upwards until we can see the top of our page. And this is the area where we might want to add a title. Well, to do that, we can't simply click and start typing. We need to insert a text box. Go to the Insert tab on the ribbon, and from here, you'll see there is a Text group. Text box has a button on top and a drop down button below. Click the drop down button to see that there are actually two choices, the default, if we simply click the button on the top half of this, is to draw a horizontal text box. So everything we type we'll go left to right. But if you wanted something, say down the side, listed vertically, a vertical text

box allows us to type up and down the page. So we do want a horizontal text box at the top, so we'll select it. Which is the same as clicking the top half of this button. Notice it says draw a horizontal text box. That's the key word. We don't just click and start typing. We need to draw the box at least close to the area where we want it, and we can use the ruler and the guide that appears on those rulers to help us get things lined up. For example, as we move left to right, you can see that guide at the top on the horizontal ruler, get it to around two and a half inches. Now, slide down to about 10 and 1/4 inches on the left-hand ruler, and you're ready to click and drag across, and we'll go all the way over to the six-inch mark at the top, and scroll down or drag down to the nine and 3/4-inch mark and release. Now don't worry if it's not perfect because we can simply move this box around, resize it as we need to. This is just a starting point. You can see there's a cursor right in the center of our text box waiting for us to type. And there's already default formatting applied to it as well using the theme that comes with this template. So let's see what happens when we type Employee Onboarding with a capital E, and you'll notice that the color is a blue color, that's the color that goes with the theme or color scheme used in this theme. And if we go to the Home tab on the ribbon and look at the font group, you can see the default font being used, and the default size, all of which can be changed, and of course, we can also add attributes like bold, italics, underlining, change the color if we wanted to. Let's start by selecting the content inside by clicking and dragging from employee to the end of onboarding. Notice that we have a quick formatting toolbar that shows up, and we can access those same options from here as well. For example, if we want to change the size, we can click the dropdown and choose one of the presets. Maybe 14 points would be good. As we hover over these, we get a real-time preview of what we're about to select. Let's go to 14, maybe a little larger. We can use buttons to increase or decrease the font size. The increase font size button is just to the right of the size, click it, and it goes to the next preset, which is 18. Click the decrease font size button to bring it back down to 14. If we wanted something in between like 16, we can go in here or up here on the ribbon, click right inside the size field, that highlights everything. So 14 point is already highlighted. We can type in 16 and press Enter to lock that in. Notice everything's still selected so we can continue to make changes, for example, it might look good if it were bolded, much thicker, and here's the font color, click the dropdown. You can see that there are theme colors. These are colors that come with a theme, and different shades of those colors as well. As we hover over them, we get a real-time preview of what that might look like. There are also variant colors, so we could go to an orange. This is Red 30, I'm thinking a nice deep shade of red under the standard colors, we see dark red here on the left. Go ahead and select it. Now everything's still highlighted, so we can click in the background to de-select it to see exactly what we're left with. And that is the text inside a text box that has an invisible border and no shading. So it just looks like text on our page, of course, when we go near it and see our most changed to that foresighted arrow, we can click. If we wanted to move things up and down, you can see the spacing guides will appear, and those alignment guides, when we get it in the exact right position, we can let go, click in the background, and that looks pretty good. So other objects, like text boxes are added differently than some of the objects we see here in our shapes pane from a stencil, but once we get them there, there's a lot we can do with them. We'll continue working with additional types of objects next.

Insert foreground and background pages

When creating diagrams here in Visio 2021, especially those that start with a blank page, like our Employee Onboarding diagram we've been creating, you could end up with a lot of white space. And to make your diagram more interesting, you might consider adding backgrounds, something we're going to explore in this movie. We'll do it with R30_Onboarding0302 if you're catching up. Let's start by zooming out to the entire page. We'll go down near the bottom right-hand corner and click Fit Page to Current Window to get that bird's eye view of our entire page. And there's all the white space I was talking about. We can add some visual interest by putting something in the background. Take a look in the bottom-left of our window here where we see page one. That's all we have for this diagram right now. There is no background. To add a background, we go to the Design tab up here on the ribbon. And way over here to the right, we see the Backgrounds group for adding backgrounds, and Borders & Titles as well. Let's start with Backgrounds, we'll click the dropdown. Here, you can see at the top selected is No Background. That's what we're seeing currently, the default, but there are some backgrounds to choose from down below. Some gradients with lighter and darker areas, at the top, bottom, left, or right, or in the center. There's a world map as well, if you wanted that in the background. And then we have some other ones that include graphics. I like this one here called Verve. Notice when you hover over these tiles, you get to see the name. So add a little graphic in the bottom-right and some gray shading in the background. Let's go ahead and select it. It gets applied, and check out now down at the bottom-left of our screen here, we have a new tab, the Vbackground 1. Go ahead and select it, and you'll only be looking at the background, which means we could add additional things to this background layer. And when we go back to our page one, and start working on our shapes in our diagram, those things in the background will not be selectable and cannot be altered. So it's kind of safe back there in the background. So that's a nicer look. I think maybe something around the outside would look good as well, such as a border. Notice in the Backgrounds group, the other button is titled Borders & Titles. The borders can contain titles. So maybe our employee onboarding title currently in a text box would look better in some type of border. So let's go to the Borders & Titles drop down, give it a click. No border and title

currently selected. And you can see there's a number of different options to choose from. There's Tiles, Urban. I kind of like this one down below, the fourth one, Austere, which includes, looks like a date area, an area for the title, and page numbering in the bottom-right. We can select this with a click, and it's applied to get a good look at what we've selected. Let's zoom in. I'm going to move the zoom slider to around 75% and scroll up to see that, indeed, we see the current date. Your date will be different, an area for the title, and then down in the bottom-right corner of our page, we have the page numbering. And of course, the color scheme being used is based on the default theme, all things that we can change and customize, and we will, a little bit later on. Right now, let's get employee onboarding in the Title area. Remember, this goes into the background. So if you tried to click the title nothing's happening here, you can't edit it without going to the Background tab down below. So go ahead and select it. You might want to zoom in here as well, so we can see what we're typing. Scroll up to the top. Now, when you click the Title area, you can see the selection handles around the outside. Double-click to select the word Title, and type Employee Onboarding. Now, click in the background to de-select, click outside the page, and you'll remove those handles as well. Which means now when we go back to page one and select it, we see Employee Onboarding at the top, which means we don't need this text box any longer. Go ahead and click Employee Onboarding, the title right on your page, and hit your Delete key on the keyboard to remove it. Let's get a bird's-eye view again by going down to the bottom right corner and choosing Fit Page to Current Window to get a nice overview of what we've created here thanks to backgrounds, borders, and titles.

Insert graphics

Another way to add visual interest to a diagram here in Visio 2021 is to add graphical images. Now Visio does include a number at your disposal plus you can add your own, something we're going to explore with our R30 onboarding diagram we've been building, 0303 if you're catching up. Let's start by zooming in to the top part of our diagram. We'll click and drag the zoom slider down here in the bottom right corner all the way up to 100%. And with the scroll bar, we'll scroll up to the top of our page, so we can focus in on that area. Next, we'll go to the insert tab on the ribbon up here in the top left and down below in the illustrations group, you'll see a button for icons, but pictures has a dropdown arrow, and when you click that, and go to stock images, and select it, you'll notice we can access icons from here as well along with some other options like images, cutout people, and stickers. With images selected, you can see different categories across the top, you can scroll through those using the arrow, there are additional categories. But down below, you'll see all of the images that you get with Visio and this is always being updated, so you may see a different list of images. Very cool options to choose from here, but none really apply to our diagram, so let's check out some of the icons. Here with icons, again, we have categories across the top that we can scroll through. And then down below, it's a simple matter of selecting the one that you want and clicking insert down below. I don't see anything that's going to help us in our diagram. What about cutout people? Selecting this shows a number of different people with transparent backgrounds. That's the checkered background that you see there. Again, an arrow that will take us through the different categories. In this case, because we're working with people, we're looking at the names of people across the top. So if you see a particular character that you want zero in on, for example, Rachel, you can select her name and see only her character positions. You can see some of them include blank slates that we can add our own text to if we wanted to. Cool options, again, nothing that really works for our particular diagram. Stickers, they can be fun as well. Again, nothing here that's going to help us in our diagram, so let's click cancel in the bottom right corner. Instead, we'll go up to pictures again, click the dropdown and choose pictures at the top. This allows us to go browsing for our own images and I do have one for you in the chapter three folder of the exercise files. It's the Red30 Tech logo. Notice it's a PNG file. Hover over it, you can see the size dimensions. Down on the bottom right corner, you can see a full list of the different types of images we can bring in, GIFs, JPEGs, SVG files, TIFs, and so on. This is a PNG file, so selecting it and clicking open will add it to our diagram. And a PNG file, in this case, has a transparent background, so we can see our image, the default size with handles around the outside that we can use to size this. Go to the center when you see the four-sided arrow, you can click and drag this into position. We want to bring it up to the top right corner. And we want to size this down. I'm going to go to the bottom left corner handle with the double diagonal arrow, click and drag to size it down. Once we get to a size that shows Red30 above the line and tech below the line, we can now click in the background to deselect to see what that looks like. And we can make adjustments by clicking it and you can use the cursor keys on your keyboard, for example, to move it to the left, maybe up slightly, or down slightly until you get it exactly where you want it. Click in the background again to deselect. Now one other thing we can do is add more shapes that we don't see over on the left hand side in our shapes pane. For example, for the accuracy check, we might want graphics that show approved versus not approved. So let's go to more shapes over here on the left and you'll see that when we go to Visio Extras, there's something called icon sets. Go ahead and select it. This just opens it up in the shapes pane and maybe we want status icons, so just click once to get to status icons. You can see we can drag 'em onto the page and then right click them to change the status. So we'll click and drag it onto the page. You can see the default check mark in the green circle. Let's move it all the way over the approved line up here in the corner. And let's do another one, we'll click and drag it onto the page, but this time, we'll right click. And from here, we

can change the icon. It opens up a pane, the display icon, they're numbered, and if we go down through the list, you can see what they look like. It's a warning sign for two. Go down to four, it's the red circle with the X in it. Now we can go in here, click and drag it to the other corner on the left side where corrections are requested. Click in the background to see what that looks like. When you're done with the shape data, you can close that up, it has its own little close button in the bottom right corner. And let's go down to the bottom right corner of our screen and click the page to current window to zoom back out to see that we've added some visual interest and some branding to our diagram thanks to all of the options we have for adding images. When we're done with icon sets, we can go back to more shapes, across and down to Visio Extras. You can see it's checked off. Clicking it again will deselect it and take us back to our original options like basic flowchart shapes.

Insert a callout

There may be times when you need to add additional information or maybe instructions along with an object that appears in your diagram here in Visio 2021. For example, you may have a shape that needs additional information and you can use something called a callout to do that. That's what we're going to explore with our R30 onboarding diagram 0304 if you're catching up. We'll begin by zooming in with the zoom slider to the 100% mark here. And scroll up so we can see the top portion of our diagram, which includes this online form submitted shape. Maybe we need to add some information that people will go to the company website to access that online form. So there's a couple of different ways to add callouts. Select the shape first, that way any callouts we add from the ribbon, by going to the Insert tab in the diagram parts area, you'll see Callout. Click the dropdown and here you'll find a handful of options. As you hover over these, you can get a feel for what it's going to look like with that live preview if you were to make the selection with a click. You can see either thought bubbles, circles or orbs. Hover over these to see their names as well. So if none of those suits your needs, no problem, just click in the background. And another option is to access some more shapes over here in the Shapes pane, clicking More Shapes, then moving to the right and down to Visio Extras, and then moving to the right in that sub menu, you'll see Callouts. Clicking Callouts here opens up an additional pane on the left-hand side with many more options for callouts. So, click in the background to close up that menu and use the scroll bar to scroll down the many, many additional callout options we have at our disposal, thanks to this option here. Now, it doesn't matter if your shape is selected when we use the shapes pane to add a callout, we'll have to make the connection ourselves. So let's go to Custom callout 1. Click and drag it onto the page. Using the alignment guides, we'll make it so that it's lined up with the center of our online form shape and off to the left a little bit. When you release, you'll notice that it's not connected automatically to the shape, but we have this yellow handle called a association point. We can click and drag it over to our shape. We can glue it to a connection point around the outside of our shape. I think the one on the left side of our online form submitted shape is a good spot and release. Now because this is a custom callout, we can actually choose shape data, like costs and who's the owner, start dates. None of these apply to what we want to add, so we don't need to select any shape data, all we have to do is click OK. And we now have our callout. Notice that it's selected by the handles that appear around the outside. Which means we can now go in and start typing exactly what we want to appear in that callout. So how about something like, employee accesses form via company website. And now click in the background. You can see what's happened to the callout shape, it stretched to accommodate that string of texts, but we can go back to it, give it a click and reshape it. Go to the left handle in the center and drag that in. You can see as we make it less wide, that multiple lines of text now appear. And of course we can move it around. It's going to stay connected because we glued it to a connection point. Click and drag it a little further out even and de-select by clicking in the background. Of course, there's a lot of formatting we can do with the text itself and the callout shape. We'll get to some of those options a little bit later. But, when you need to add additional information or instructions like we've added to a shape, remember you can access callouts from the diagram parts section on the insert ribbon or add callouts to your shapes pane, and you'll have access to even more options. When you're done with callouts, you can go back to More Shapes over here on the left, across and down to Visio Extras, across and up to callouts, you'll see the check mark when we click it. Now, we'll be closing it up. Now we can click Basic Flowchart Shapes to get back to those original shapes.

Add ScreenTips to objects

When you need to add additional information to certain objects in a diagram, but you don't want to clutter up your diagram with too many call-outs, another option is to use screen tips. They only appear when you hover over an object like a shape. In fact, you can even add screen tips to call-outs and that's what we're going to do in this movie with our AR 30 onboarding diagram 0305. If you're catching up, we just added a call-out. Maybe we don't want it to get too big and full of information. So we add a screen tip to it instead. That means going to the shape or in this case, the call-out and clicking once to select it. Now with the insert tab still selected up here on the ribbon, we go over to the text group and that's where we find screen tip. Go ahead and click that. Opens up a dialogue where we can type in any additional information we need to add and this information will only appear when we hover over that shape with our mouse pointer. So let's add something like online form can be printed, filled out and submitted manually. It's a lot of information we don't necessarily

want showing up in the call-out, but good information that can be provided by simply hovering over this call-out shape. So let's click OK. And click in the background. Now, when we move over our shapes and get to this call-out and hover over it, you can see the screen tip pop up with that additional information. Now, if at any time you want to remove a screen tip, you just go back to the shape by selecting it with a click, go up to screen tip, you'll see that information already selected or highlighted, and you can delete that to take it out and then click OK, but we're going to keep ours. So we'll click cancel and click in the background. So keep in mind, if you don't want to clutter up your diagram with too many call-outs you can add additional information to objects like shapes by using a screen tip.

4. Formatting Objects and Text

Use themes

The overall look and feel of your diagrams that you create here in Visio 2021 by default depend on the template you chose and the theme used by that template. Of course, all of that can be changed. We can choose from different themes and themes even have their own variations, which we're going to explore in this movie with our R30 onboarding diagram 0401 if you're catching up. Let's go down to the zoom slider area and click the button to fit page to current window. Since we won't be working on content, but rather the look and feel of our diagram, this is a good bird's eye view and will allow us to see those changes instantaneously. Let's go up to the design tab next. From here, you'll see a list of themes. And the first one, the default theme, currently highlighted or selected with a border, and you can see the variant of that theme that's being used. So if you like the theme, which gives you a certain set of fonts, font sizes, colors, the whole color scheme is based on that theme, and you want to keep it but choose a variant, go to the variants area and just hover over some of these, and you'll see how it totally changes the look and feel of your diagram. You'll notice a drop down button that gives you access to additional options like just changing the color scheme without changing any of the effects or any of the text and its formatting. You can go to some of these other color schemes, and if you see something you like, simply click it like retrospect, for example, and you can see how that's really changed. Notice under themes now, we have a different theme selected and its variant. Click the dropdown and you'll see other categories. We have professional, modern, trendy. If you go down to hand-drawn and hover over some of those, you could see what a hand-drawn diagram might look like by hovering over whiteboard or the one to the left called marker. Totally different look and feel. We want to keep ours professional and we selected a variant of a current theme, so we'll just go to the background and click to close that up. Now you can see not only are the colors different, but the fonts, the font colors inside our shapes are changed, all of which can be overwritten manually if we wanted to. Also notice that this affects the background and the borders that we've applied to our diagram. So themes give us a very quick and easy way to change the look and feel, the color scheme, the fonts being used, and because themes have their own variants. We have a wide range of looks and feels to choose from.

Format text

When do you have a theme applied to a diagram here in Visio 2021, a number of formatting options are applied for you, like the color schemes that we looked at in the previous movie, shape formatting, any special effects. It also affects your font face and font formatting, or text formatting in your diagram. And if you need to, you can override any of that theme text formatting by going into a title, a shape, even a connector and changing the font formatting yourself, and that's what we're going to explore in this movie with our R-30 Onboarding Diagram, 0402 from the Chapter 4 folder of your exercise files if you're catching up. Let's start by going down to the zoom slider and we'll click around the 100% mark to get it there so we can see what we're doing. And we'll scroll up into the area at the top of our page, which is actually part of the background. Remember, we added this border to our page, which includes the date, the title that we added at the top, and the page numbering that we see down at the bottom right-hand corner. Of course, we can override the formatting that comes with the theme and is already applied to this text. First, though, we need to go to the background. Now, as we scroll down, if we want it to affect all of the text in our background, we simply click on that border. Now, any formatting changes we make in the font group up here on the ribbon with the Home tab selected will apply to our date, our title, and our page formatting in the bottom right-hand corner. So, let's try a couple of different things. For example, we might want to bold this. When we click Bold, you can see the date in white text does get much bolder, same thing for our title and our page number formatting in the bottom right-hand corner. If we wanted to change the font face to make it a little more interesting, we can click the Font Face dropdown. Notice as we hover over these, we get a real-time preview of what we can expect if we were to make a selection. So as we scroll down through these, some of them make sense. Some of them do not, and you may see a different list of fonts than I do. It all depends on your installation, but we're going to scroll down and choose something that most people will have. Let's go down to Corbel, and select it. It's a little bit different. The bolding's still turned on. Notice we can turn italics on or off. It's a toggle, click to turn it off again. Underlining, we don't need that, so we'll click it again to turn it off. And I think we have what we want. So let's go down to the bottom and click page one now to return to our diagram. So we've made some changes to the background. Now it's time to override some of the

formatting we see in our shapes and connectors. Check out the connectors where we see corrections requested and approved on the other side. We can select one of those. Just select the connector itself, and make changes here in the font group that will affect any labeling, like the word approved. So if we wanted to, we could bold that so it really stands out a little bit better. Maybe bump up the size from the default eight points to nine. I'm thinking maybe even 10. And if you wanted to, you could do the same thing for the other side. Click the connector. You can collect the text or write on the line itself. It is now selected. We'll bump it up to 10. That's a little bit too much for that much text, so we'll bump it back down, clicking the Decrease Font button. And let's bold it. And probably, eight points was good for that much text. So we'll go over to Approved, and we'll just simply bump it down to match, eight points. Because we bolded it though, it's a little bit easier to read, click in the background to de-select, and that's overriding text in a connector. And of course, if we wanted to, we could do the same with text in any of our shapes, like this call-out, for example. Now, to change the texts, we don't have to select the text, just the shape, or in this case, the call-out, and make our changes up here as well. I'm going to go to Bold. Let's go to the dropdown and change that to Corbel as well. You can change it to whatever you like. I like that Corbel, and it's going to be consistent with our background text as well. It kind of stands out and is a little bit easier to read like that. Click in the background to de-select. So although font formatting, the font face, the style, any special effects, come with a theme, we can go into any or all of our shapes, connectors, and background to override that formatting and make our own adjustments using the Font group up there on the ribbon with the Home tab selected.

Format shape fills and effects

We know that the formatting we see applied to the shapes in the diagram come from the theme that is selected, whether we use the default theme or choose something different, but we can also override any of that formatting for one or more shapes in a diagram, something we're going to explore in this movie with our R 30 onboarding diagram, 0403, if you're catching up. For example, we have a shape here which is a call-out and we might want it to stand out a little bit more than it does right now, so it doesn't look like it's just one of the other shapes, but rather something different; it is a call-out after all. So let's select it only. Now, if we want to override any of the shape formatting, we have a couple of options. First of all, with the home tab selected on the ribbon, if we go to shape styles, you'll see something called quick styles. Give that a click and we can apply multiple effects. We could change the fill, the outline, even the text on the inside by simply choosing one of these quick styles. For example, we might want it to be filled with white, which changes the text itself to a dark orange. And you can see around the outside, we have that orange border. We can hover over any of these if we want to test them out before selecting them to see what they look like. I am thinking though that this variant style up here, orange variant two, is going to work nicely for our call-out. So go ahead and give it a click. Now click in the background to see that change. So although the theme is still applied to our diagram, we've just overridden a single object, our call-out here, and we could do it for any or all of the shapes in our diagram. For example, if we scroll down and we want to change the final shape here, employee hired, we can select it and just change its fill, for example. Clicking the fill drop down gives us access to the theme colors. And again, we can hover over these. If you're not seeing them, just use your scroll bar to get it into a position where we will be able to see it. I'm going to scroll way over here. Go back to the fill dropdown up here in the shape styles group and start hovering over some of these. And you can see what they look like. The variant colors. We have some standard colors that aren't part of the theme that we could apply if we wanted to. Many of them are not very useful. Some of them might be better than others. For example, this very dark red, go ahead and select it. So we've changed a single shape here, and if we wanted to change other things to do with that selected shape, such as the line around the outside, we could do that. Click the line dropdown. Now anything that we choose here will affect the border around our shape. For example, we might want to go to white. Now, on a white background, we won't really see that. So let's try one of the gray colors. So you can see as we move down these, in the background, we get a feel for what that's going to look like. I'm going to go with this fairly dark gray in the fourth column at the top. And we also have effects. Click the dropdown here and you can see things like shadows, reflections. In this case, we might want to apply a shadow to the entire diagram, not just a single shape, bring it off the page, make it more interesting to look at. So click again to close that up. Let's go down to our button in the bottom right-hand corner that will fit page to current window. Click in the background so nothing is selected. If we wanted to apply any of the effects to a group of shapes, all we have to do is click and drag around them. For example, if we wanted these four shapes adjusted, we could select them by clicking and dragging around just those four. If we want all of our shapes included, we'll click and drag from the top left to the bottom right of our diagram to select everything. Now we can go up to our shape styles and change the fill, the line, or let's go to effects this time, hover over shadow, and you'll see a number of different shadow options. And as we hover over these, again, we see a real-time preview in the background. Almost appears to come off the page with some of these. I kind of like this one here, offset top left. Go ahead and select it, click in the background. Let's zoom in to 100% now on the zoom slider to see that, indeed, our diagram looks very different. It's very interesting. I like the visual effect of it coming off the page. We've really changed the look and feel by overriding the style with some shapes styles. Easily done here in Visio 2021.

Format shape lines

Many diagrams here in Visio, especially connected diagrams like the one we've been creating, will consist of a number of different lines. Lines going around shapes, connecting shapes to one another, and all of these lines have their own formatting, which we're going to explore in this movie. We're going to do it with our R 30 onboarding diagram, 0404 if you're catching up, and let's start by scrolling up to a point where we can see our call-out here. Now, the call-out, we have changed some of the formatting. The fill is a little bit different, and if we wanted to make a change to the line that's connecting our call-out as well as the line around the outside of it, we simply click it. If we want to make changes to multiple shapes, just hold down your shift key and start clicking those other shapes. You can see that it's the same as clicking in the background and doing that marquee select to select multiple shapes. But right now, we'll click in the background to de-select and just click once on the call-out for employee accesses form via company website. I'm going to zoom in a little bit more so we can really focus in on the line that we see that connects to our form and the line going around the outside of the call-out. Now, we know we can go to the shape styles group here with the home tab selected on the ribbon, and go up to the fill to change it. There's line right there, and clicking this gives us access to theme colors, weights, dashes, arrows, and line options. But click in the background and notice that the shapes styles group here on the ribbon has this little expansion arrow in the bottom right corner. This allows us to open up a pane on the right side of our page, giving us access to all of those things at once so we don't have to keep going back to the dropdown. So go ahead and click it and it just takes a moment for the format shape pane to open up here, and you can see, with this first button, fill and line selected, we have fill and line categories. Each of them has their own expansion arrow, and we want to focus in on the line. If we click the expansion arrow for fill, you can see all of those fill options, plus a lot more for gradients, transparencies, colors, and brightnesses and so on, but click the arrow again to collapse it and let's focus in on the line formatting. We'll expand it with a click of the arrow, and you can see currently we have a solid line. You can see the color of that line, there's no transparency, there's the width, all of which can be adjusted. So I'm going to scroll over so we can focus in on that area and let's start with no line. When we click no line, you can see there's no line around the outside of our shape and there's no line connecting it, and that doesn't make sense. Gradient line allows us to create gradients of color. You can see darker and lighter shades on the line. So I think solid line's going to work best for us, and we might want to change the color. Click the color dropdown gives us access to all of the theme colors, variants, standard colors and more colors if you can't find what you're looking for. We're going to go with a dark black here. When we select it, we see the black connector and the black border around the outside. That really makes it stand out. We can change the width as well, currently set to 75 points. Notice we don't have to keep going back to the shape styles on the ribbon. We can do it all from the format shape pane that we have opened up here. So we can use the arrows if we want to bump it up. You can see it getting thicker and thicker with each click. Eventually, it gets a little too thick and we can bump it down using the down arrow. Let's go down to one point. You can click in here and type in an exact value if you wanted to as well. We could also change the dash type if we wanted to. Currently it's a solid line. That's number one. If you want to try dots or dashes, you can see a lot of different options, like number 10 here, which is called half dot. You can see what that looks like, and that might be useful. Try a different one. Click the dash type drop down and try something with a little more space between the dots. Probably the solid line is best. So we'll go back to the dash type and choose number one, which is just solid. So no dots or dashes. As we scroll down, you can see some other options. If we wanted to, we could add arrows, choose the arrow size, a different beginning and ending arrow, different sizes; lots of different options that we don't see on the ribbon with this format shape pane, and we can access them all together in one spot, which is kind of nice. Notice also we can go up here to the effects button, click it to get access to all of those special effects we see from the effects drop down. Again, all in one place on this format, shape pane, but we're going to close it up with a click of the X in the top right-hand corner, click in the background of our diagram to see those changes applied to lines and connectors. We can do this for many shapes, selected shapes, the connectors between our shapes if we wanted to, or simply go with what we have based on the theme we selected a little while ago. Let's go down to the bottom-right corner, click fit page to current window to zoom back out and get a nice bird's eye view of what we have so far.

5. Creating Other Diagram Types

Create an Azure diagram

Visio can be used to create so many different types of diagrams. Not just flowcharts, like the one we've been building. In this chapter we're going to take a moment to explore some other interesting diagram types so you can get a feel for what Visio has to offer. We'll begin in this movie with a popular option for those who might use Microsoft Azure. Azure diagrams are popular for showing things like network topologies, virtual machine configurations, operations, and more. We're going to create a quality assurance diagram using Azure templates, stencils and shapes. So you can close anything you have open in your Visio window right now, like I have, and then go to File, Select New, and scroll down, where we see "Office" selected here and "Categories" right next to it. Click Categories, and that way, you'll see that one of the options is Azure

diagrams. If you don't see this Azure diagrams tile up here on your screen, scroll further down and click the Network tile, then Azure diagrams. But if you've used it before and you do see it up here like I do go ahead and select that tile. Now we can start from scratch with a blank page or use one of the templates. For example, Jenkins server on Azure. Hover over the one down below to see personalized marketing solution using Azure. And there is another one there for retail and e-commerce solutions. We're going to start with a blank page. So go ahead and select it and click Create. Now, this is going to create a blank page for us, and you can see on the left-hand side in the shapes pane, we have a full list of different Azure stencils. It's quite a long list. The one that's selected by default shows you some other Microsoft apps. But we're going to go up to the very first one here under more shapes, Quick Shapes, go ahead and select it. That gives us a nice starting point. Next, we're going to go to our page, but before we start adding shapes, let's turn it on its side. You may remember how to do this. We're going to change the orientation to landscape. So go up to Design. Over here, in page setup, click the dropdown for orientation and choose landscape. Next, we're going to zoom in a little bit. Use the plus sign on the zoom slider to zoom in to almost 100%, at 96. Now we'll just add some shapes and then we'll move them around and connect them. You'll see it works very much like the diagram we created, which was a flow chart. So over here on the left-hand side, going down the categories, let's go down to Azure AI machine learning. You can see there's only a couple of shapes in this stencil. One of them is cognitive services. That's one that we do need. I'm going to drag it up here, around the center and around the six inch mark on the left-hand side at the top. All right. Next, we'll go back to the left-hand side here. And let's go to, as we scroll down the list, Analytics. For Azure analytics, we need a couple of different shapes here. For example, we need an event hub, so we'll click and drag it. Let's just drag it over here to the left side and down a little bit. I'm going to get the left edge lined up with the three inch mark at the top ruler. And let's get the top of this shape lined up at the four and a half inch mark and release. There we go. We might need another one here as well. Let's go with the Stream Analytics. And we'll drag it so that it's lined up below Cognitive Services. We want the centers lined up. And the centers lined up on the left with the Event Hubs and release. There we go. You can see we're starting to add several shapes. None of them are connected by default. And as we hover over these, you can see there are no connection arrows. So we'll be adding those connectors ourselves. Alright, let's scroll down the list here until we get to Azure Databases. Select that stencil. You can see a lot of different choices here. We want a Managed Database. So we're going to click and drag Managed Database up here to the left of Event Hubs. And we'll try and get it so the spacing is equal with Stream Analytics and the centers are lined up between the two shapes and release. There we go. We also want an SQL Data Warehouse. So as we look down the list, we may need to scroll further down to see there is an SQL Data Warehouse here that we want lined up below Stream Analytics and spaced out the same as Cognitive Services. So all those guides and spacings are there for us as we create this type of diagram as well. All right, there's just one more now to add, and it's going to be a way to measure this thing with Metrics. So as we scroll down the list, let's go down to Management Governance. And from here, let's go down to our shapes and drag Metrics over to the right. So it's spaced out nicely like the rest. You can see those spacing guidelines. And centered with our Stream Analytics shape, and release. There we go. So we have the beginnings of our diagram. We just need to get things connected. And that means going back to our Home tab up here in the Tools area, we'll go to Connector and simply start dragging from one to the other. We'll start at our Managed Database. When we see it encircled in green, we know it's the shape. If we go to a point, we can glue it to that point, which we do want to do. Drag it over to Event Hubs, to that connection point on the left and release. Now we still have our connector tool, so we can go to other connection point on the right and drag it over to Stream Analytics to that connection point. Now we want to go down and we'll go down from the shape to SQL Data and release. We also want to go to the right from here, to our Metrics. You can go right to the entire shape. And same thing for SQL Data. Click and drag across and up to Metrics and release. And we also want to go from our Stream Analytics up to Cognitive Services. There we go. Now click in the background. You can see what that looks like. We'll go back to our pointer tool and we can start making adjustments, changing arrows, changing our connection points if things are lined up improperly, but you get the idea. Creating an Azure diagram, in this case, for quality assurance, is as simple as accessing the template. You can use a blank page like we did, or get a head start with one of the choices that you see offered. But if you use Azure, it's good to know Visio has Azure templates, stencils and related shapes to help you plan out and diagram your next Azure project. We're going to close this up without saving. Clicking the lower close button up here in the top right hand corner and choose Don't Save.

Use AWS shapes in a diagram

Many businesses are moving their systems and infrastructure to the cloud. One of the biggest providers of cloud services is Amazon. So I wonder how difficult it would be to draw something up using Amazon Web Services here in Visio actually is going to be quite easy. Thanks to some built templates, stencils, and shapes we're going to explore in this movie. We have everything closed up and we're ready to start a brand new diagram by clicking file. Then go down to new over here on the left, let's scroll down to our categories and select it. So we can go to network diagrams. When we select this, you'll see all of the different options, including there it is. AWS Diagrams, Amazon Web Services. Go ahead and give it a click. This takes

us to some options where we can start a brand new AWS Diagram from a blank slate using the blank page or use one of the templates provided SAP using SIOS. As we hover over these, we see some other options to help us get started. Let's go with one of the templates. We'll go with this SAP option using SIOS when you click it, you get a description of what you're going to be creating. And if it's exactly what you need, you click create. But really what I want you to see is that down the left-hand side, we have a number of stencils, AWS networking, content delivery. And when you select it, you'll see all of those shapes and icons, et cetera, that can be added to a diagram. AWS Compute has a different set, and it's quite a lengthy set. Everything you might need to draw something up that would represent an Amazon Web Services cloud infrastructure, AWS Containers. There's the general option. You'll see a lot of the generally use shapes when drawing up these types of diagrams, many of which appear already on the diagram. Let's zoom in a little bit. I'll go to a hundred percent and scroll up and down to see some of the different containers, icons, shapes, and connectors being used in this SAP using SIOS Diagram for Amazon Web Services. So keep in mind as you're creating new diagrams, if one of them involves drawing out what you plan on using for cloud infrastructure and networking using AWS or Amazon, you have all of the options you need at your disposal. Thanks to the built in template for AWS Diagrams. Let's close this up by going to the top right corner and clicking the lower X to close this drawing up and takes us back to a blank screen.

Use workplace social distancing objects

Visio has always been an excellent application for drawing out floor plans, such as an office layout, for example. Well, these days, you might have to take into consider workplace social distancing factors, and Visio has you covered. In fact, many people are redesigning their office layouts using some of the things we're going to explore in this movie. As we go up to the File tab, select it, and click New. Next, we're going to scroll down to the categories and select it. As we scroll down to the categories, now we'll select Maps & Floor Plans, and it's here where we can scroll down to find social distancing. Go ahead and select it. There are no templates aside from the blank page with it selected when you click Create, I want you to see what happens, a little bit different. We don't get a blank page. In fact, we actually get a page full of information. And as we zoom in using the zoom slider, we'll just drag it up to around 33%. You can see a number of examples using social distancing shapes like circles. You can see some of the symbols representing the six feet apart. As we scroll over and down, some instructions. You can see many workplaces need to be re-planned using some of these tools. And over here on the left, all you're seeing for stencils are the usual floor plan stencils. If you want to get access to the special workplace social distancing symbols and shapes, in that case, you need to go up to More Shapes, select it, scroll over and down to Show Document Stencil. When you click this, the document stencil's going to open up, just click in the background to close up the menu. And here, you'll see things like Feet Stop, and sanitizer stations, direction arrows. There's the Keep Apart symbol that we see in the sample diagram labeled Diagram down below. Of course, we'd want to start a brand new page, clicking the plus sign to insert a blank page where we could start adding the parts of our office layout, including walls and furniture. But, also from the document stencil, workplace social distancing options. And you can see, we have space and boundaries. And then we see some of the usual things like cube workstations. We see equipment, and furniture. But up at the top of our document stencils, some new ones for social distancing. So if you do need to re-plan or relay out your office, keep in mind that, with the document stencil open, you can access some of the things that will help you to enforce workplace social distancing. When you're done with the document stencil, remember to go up to More Shapes, over and down to Show Documents Stencil, which when clicked, will hide it. And we're back to the usual stencils. Click in the background. Let's close this up without saving. You can click the lower Close button up here in the top right-hand window to close the window only, taking us back to a blank screen.

Create a wireframe for a mobile app

When those who design the user interface for a software application want to bring that application idea to life, they might use a Visio wireframe. It's a visual model of an application's user interface that's kind of like a blueprint of functionality and content. To get started, you can use Visio to create what's called a low-fidelity design sketch to help form the basis of an eventual high-fidelity wireframe. You can even create a wireframe for a mobile app now, which is what we're going to do by going up to the file tab here in Visio and selecting new. Next, we'll scroll down to categories and select it, because we'll find wireframes in the software and database category. Go ahead and select it and then scroll all the way down to the bottom to see the wireframe options. We can do it for a software application, for a website, and there it is: Wireframe mobile app. Select that one. Here we have some options. We can start with a clean slate or we can get a headstart with different types of wireframe diagrams for mobile apps. For example, we can create a list wireframe diagram. Here's one that's good for media. And maybe you're setting up a user profile. User profile wireframe diagram will help you get started with all of the different containers and controls you might use when setting up a user profile on a mobile app. Let's go though with the blank slate here. We'll click the first tile and click create. Notice what happens down the left-hand side in the shapes pane. We see a number of mobile options, like cards and containers, controls, navigation, text, and annotations, there's media and media

icons, all kinds of things that we would use in a wireframe for a mobile app. But we're going to start with cards and containers. You can see at the top, we have a number of different containers that would represent some of the different types of mobile devices. For example, phones and tablets. Let's go with the 3X2 frame. We'll click and drag it out onto the page. When you see those guides appear, showing you that you're centered vertically and horizontally, release. Puts it right in the center. Next, we're going to add inside the container now. Let's say we wanted to set something up that would allow people to go in here and add their contact information. There's a contact information card here that we can now click and drag inside the container. Look how it fits nicely. When you see that green border around the outside, release. Let's zoom in to see what we have so far. You can click and drag the slider on the zoom slider down below to zoom into around 66%, for example. You can see the top of our device, then you can see on the screen, we have the contact. You can see the fields that appear in there on this card for the name, phone, email, and even an area to add text. If we wanted to add anything else, for example, mobile controls, you can see, here we have a number of different buttons and combo boxes and so on. Let's say we wanted to add one of those hamburger icon buttons. Well you could go within the icon or to the button, click and drag it over and drop it in here if we wanted to give people options, and this of course, clicking it, would display a number of menu options. If you don't want something that you've added and it's still selected like we see here, hit your delete key to remove it. So that's a quick intro to creating wireframes, something that you can actually do for mobile apps now. If you design user interfaces for software applications, websites, or even mobile apps, remember, Visio has templates, stencils and all sorts of containers, buttons and controls to help with the creation of that initial low-fidelity wireframe representation. We'll close this up, clicking the lower close button in the top-right corner, and click don't save to return to a blank screen.

6. Publishing Diagrams to Various Outputs

Print diagrams

Once you've completed your Visio diagram, you're probably ready to start sharing it with others. And Visio does give us a number of different ways to do that. That's going to be our focus in this chapter beginning with the old fashioned method of printing. It's very straightforward, but there are a couple of options you'll want to consider. We're going to work with our completed onboarding diagram, R30_Onboarding_Final. You'll find this in the chapter six folder of your exercise files, but you can be working with any diagram at this point. Let's zoom in a little bit using the zoom slider. We'll just drag it to the right to around 60%. As you can see, we have some special effects like shadowing, but we also have this shading in the background. We chose a background and a border that contains our title and our date and a little bit of graphical representation of bottom right corner, including the page number. We'll have to keep that in mind. If we're going to print, we may not want that background. It's going to use up a lot of ink or toner depending on the type of printer you have. So we might want to remove that and maybe just use a text box for those things. Let's check it out. When we go to the file tab here and select print. Now, you'll see your default printer here. You can set the number of copies to whatever you like, for example three, but before you hit the print button to send it out to the printer, check it out with that background. I'm going to be using a lot of ink on my Canon printer, which is an ink tight printer. So let's go to settings where we see that it's by default going to print all the pages, the whole thing. We have a one page diagram. So that's okay. Click this to see that we could change it to just the current page. If we had multiple pages or choose specific pages using custom print. But the interesting item for us is down below where we see no background, go ahead and select that. And you can see the background and that border is removed just temporarily while we print. And that's why if we do plan on sharing by printing out copies, instead of using a background or a border, we might want to put a text box for our title and our date. If that's what we want though, we simply hit print and off it goes to the printer. You may want to get that back though, by going back to the settings dropdown and choosing no background again, that actually toggles the background and borders back on where we can see them. And now we'll hit the back button up here in the top left corner to go back to our diagram, perhaps keeping the borders and the backgrounds in there. We might want to share a different way, may be electronically, something we'll explore next.

Publish a diagram to PDF

If you plan to share your completed Visio diagram with others electronically, you might want to consider saving to a different format. Not everyone has Visio and would be able to open up a Visio file, but you can save your diagrams to different formats, including the one we're going to explore in this movie, PDF or portable document format. It's a standard format that's read only so people won't be able to go in and edit your document. They'll easily be able to open it up on any device. There are readers like Adobe Reader in the Windows environment, Preview on a Mac. All of these can open up PDF documents that will give people easy access to your completed diagram. So there's a couple of options here in Visio. First of all, we could go to file, then select save as and click browse to choose a location and a save as type. Notice the default is a Visio drawing, but click the dropdown, you'll see many different options that we can save to, including there it is PDF, or portable document format. Selecting this will convert it and store it in the location we choose. But

click cancel, there's another option. If you're going to be sending it out, instead of choosing save as, go to share. From here, we can share via email directly, and at the same time send it as a PDF. So it will be converted to PDF and at the same time will be attached to an email message you'll start in your default mail app like Outlook, for example, part of Office. So choosing send as PDF you can see is saving the pages. It's saving it as a PDF document, so we have the original copy, plus we have our new PDF version, which will be automatically attached to a new email message. You can see it there attached, and I'm ready to type in who I'm sending this to. I'm going to send it to Karen Leslie. And if I wanted to add additional people or CC this, I could. Notice the subject is the name of the file. We can leave it as is or change that. And then down below, a quick message, "Check out this onboarding diagram." Now we're ready to send it off, and away it goes in a PDF format. So portable document format is a secure way to ensure people aren't going to be editing. It's read only, they'll be able to open it up on virtually any device or a number of applications that are free, that are able to open up PDF documents. An excellent option to send out your document or diagram electronically.

Save diagrams as image files

Another way to share your completed drawing electronically is to convert it to a format that anyone can open up, like a graphical format. That's what we're going to do in this movie. We'll do it with R30 Onboarding Final diagram found in the chapter six folder of your exercise files. Instead of sending out the Visio file to people, because not everyone uses Visio, we can convert it first to another format. We'll go up to file. And from here, I just want to show you, if we go to share and select email, like we did for PDF, well, we don't see any other graphical formats besides XPS, which is kind of like the windows version of a PDF. So instead we need to choose either export or save as, which both take us to the same place. For example, if we choose export and choose change file type, we have some other options like PNGs, you can see JPEG is on this list, scalable vector graphics, SVG, if we wanted to. But if we want to save to another graphical format, we would go to save as and click browse. This takes us to the save as window, which we'd arrive at anyway. And here we get to choose a different save as type by clicking this dropdown. You'll see JPEG is on the list, but others that we didn't see from export, like GIF for example, and TIF, let's go with JPEG. Let's choose a location like the desktop. So it'll be easy to find once it's done, and click save. With JPEG, there are a number of different options to choose from as far as resolution and size go, these are kind of important. The quality defaults to 75%. If you want to bump that up or down, you can, just keep in mind the higher the quality, the larger the file size in the end. So if you're sending it via email, you might end up with a very large file. If you bump up the quality, keep in mind that we can also take these graphical versions of our diagrams and put them into other files, like Word documents or PowerPoint presentations. So again, you'll want to keep the size down. So if we go to resolution, we can have a nice resolution here. Let's choose printer for example, you can see the preset gives us 600 by 600, but if we go to source or screen, it's a very low resolution. The quality might be subpar and not easy to read. So we'll go with a higher resolution at 600 by 600. We can also use custom to set whatever we want, but here we can control the actual size of our finished object. So let's go to screen to see what that gives us, eight and a half by 11, that's fairly large. If we go to printer, that's much smaller. And if we go to source, we're back up to eight and a half by 11. Let's go with the small one, printer. So a high resolution, but a small file size. When we click okay, it's converted to JPEG stored in the location we chose. I chose desktop. So that means we can go up to the top right corner and click the minimize button to minimize Visio, taking us to the desktop where we do see our brand new file. Just one click allows you to see the name and some information that pops up, like the dimensions and the size, which is a pretty small file size. Double click it, and it'll open up in your default application for viewing graphical files like JPEGs. For me, it's paint. And as you can see, it's not a really high quality resolution version of our diagram, but it's pretty good and would be good enough to send out as an attachment in an email, for example, without creating a very large email file size. When we're done, we can close up the application we're using to view the graphical format. I'm going to use alt tab to switch back to Visio. We'll continue with one last option next.

Share diagrams using the cloud

Another big reason you may want to share your Visio diagram with others is to get their input, their feedback on your diagram. Maybe even collaborate on the diagram with you simultaneously. That's what we're going to explore in this movie with our R30_Onboarding final diagram found in the chapter six folder of your exercise files. So the very first step in being able to share and collaborate on a diagram is to get your diagram to a cloud location. In fact, if we go up to the top right corner and click Share, look what happens. In the share pane that opens up, you can see, we have a Save to Cloud button, close this up with the close button, and you'll see something similar when you go to File and select Share down the left-hand side. Here, you can see with Share with People selected. There are a couple of steps first to save your document to a cloud location like OneDrive, or perhaps your organization uses SharePoint that would work as well. And then you can start to invite people to it. So let's click Save to Cloud and see what happens. We get our cloud locations over here in this fictitious organization called Red30Tech. It looks like there's a one drive for business location, as well as a SharePoint vocation. You might see your own personal one drive here as

well. I'm going to go with OneDrive for Red30Tech. You can double click that to open up the dialogue that allows you now to save it to that location. Notice that OneDrive is selected at the top, there's the name of my file, same file name, but it will be saved to the cloud when we click Save. And once it's saved to the cloud. Now, look what happens when we go to share up here in the top right-hand corner. The Share pane opens up with a field at the top and a flashing cursor waiting for us to type in the names of the people we're going to invite. It can be one or more people. You can access your contacts from here as well, or just start typing and you'll start to see names appear. I'm going to share this with someone named Laura. As I start to type in Laura, I can see L Davis at Red30Tech, there she is. That's the person I want to share with. I want her to be able to edit, but if I only wanted her to view and not make changes, that is an option from this dropdown, but we're going to leave it at Can edit. There's an area for an optional message here. How about, "Please review and make changes as necessary." There we go. All we need to do now is click Share. Just before you do though, notice there's an automatically share changes dropdown button. You can be asked first or just always Share changes or Never. I'm going to go with Never. Now I see that I'm the owner. I can get my information from there if I wanted to or close that up. I'm about to invite Laura. And again, hovering over her credentials, shows a little bit of information about her, which can be closed as well. I know I have the right people now ready to work on this. All we have to do is click the share button to share this. An email is being sent out to Laura, in this case, we can close up the share pane if we wanted to and come back to it any time by clicking Share to see who is accessing our diagram, but to work on the diagram, we might want to close it up to create extra space. I'm going to switch over to Laura, who has received an email in her outlook account here, from David Rivers who's sharing a file. You can see the name of it R30_Onboarding_final and I'll share has to do is click this or open to open it up in the browser. That's the first step. Now she may just want to review this in her browser and you can see that the diagram appears just as it does for me. There's a zoom slider down below. So she can zoom in to get a better look at what's going on in the diagram. And if she wanted to make changes, notice there's an edit diagram dropdown. Now there are a couple of different ways to edit. There's a web version of Visio, but if she has Visio installed, she could click this, View in a legacy Visio service. It opens up a new tab, and this is just the older version with an Open In Visio link. So if she does have Visio installed, she can click here to open it up in Visio and have full access to all of the features and functions of Visio. The same that I have on my computer. So it may take a moment to load it up, but again, there are options for commenting here to provide feedback without making changes or to go in and make those changes simultaneously while I work on it in my version of Visio over here. So if you do want to share with others, remember the first step is to get your file or diagram stored in the cloud where you can then invite people to access it. As we switch back over, you can see now it's opened up here in this legacy version of Visio for Laura, who can then choose to add comments if she wanted to, there's a comments pane for adding comments to the diagram, or actually open it up in Visio and work on it there.

Conclusion

Next steps

You've reached the end of this course on the basics of using Visio 2021. You should now be feeling like you have a good grasp of what Visio can be used for and how to get started creating your own eye-catching diagrams. Now because the possibilities are seemingly endless with Visio, I encourage you to experiment with the numerous stencils and templates found in Visio 2021. There's so much more to Visio than what we've covered in this basics course so stay tuned to LinkedIn Learning for more in depth courses on Visio to come. This is David Rivers saying thank you for watching. I hope to see you again soon.