

Visio® 2000 Standard Edition

Evaluation Guide

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Getting started

This guide covers the fundamentals of Visio® 2000, and focuses on the drawing types and methods you're likely to use most often.

Installing the Visio 2000 Standard Edition Test Drive

You must be running Microsoft Windows 95, Microsoft Windows 98, or Microsoft Windows NT 4.0 or later to install Visio 2000 from the Visio 2000 Standard Edition Test Drive CD.

NOTE *To prepare for installation, close all programs and turn off virus protection software to prevent installation conflicts.*

On most Windows-based systems, installation starts automatically when you insert the Standard Edition Test Drive CD into your CD-ROM drive. If installation does not start automatically, you can install the Standard Edition Test Drive using the following procedure.

To install the Visio 2000 Standard Edition Test Drive

- 1 Insert the Visio 2000 Standard Edition Test Drive CD into your CD-ROM drive.
- 2 From the Start menu, choose Run.

- 3 In the Run dialog box, type *d:\setup*, where *d* is the letter assigned to your CD-ROM drive.

- 4 Click OK.

The Visio Installation Manager guides you through the installation process.

Visio on the Web

To reach Visio Corporation and the Visio Knowledge Base using the World Wide Web, in Visio 2000 choose Help > Visio On The Web. The Visio Knowledge Base offers the latest tips on using Visio 2000 products and includes articles that answer frequently asked questions (FAQs).

You can also visit the Visio Web site (www.visio.com), which contains information on service releases, support forums, and training opportunities. To contact customer service or technical support, visit www.visio.com/visioontheweb, and then follow the links to locate support information for your geographic area.

What's new in Visio 2000

Whether you manage people, processes, or projects, you can use Visio 2000 Standard Edition throughout your enterprise to create all types of business drawings and diagrams, from organization charts and flowcharts, to timelines and marketing diagrams.

New features

New and powerful additions to Visio 2000 make it easier than ever to incorporate business drawings or diagrams into your documents, presentations, and everyday communications.

- Easily create custom data for shapes that you can later use for reports.
- Set tabs, margins, and hanging indents for text in drawings using a text editing ruler.
- Nudge selected shapes using the arrow keys for precise placement in your drawing.
- Easily navigate, rearrange, and rename pages using page tabs.
- Edit groups the same way you edit regular shapes.

- Edit stencils directly in the drawing window.
- Customize menus and toolbars.
- Automatically align shapes using a dynamic grid.
- Create full-color drawings and diagrams using new single-click color schemes, backgrounds, and borders.
- Perform quick editing tasks right in the drawing window using anchored windows.

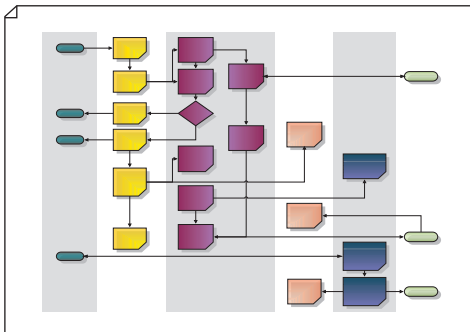
New and enhanced business solutions

Using new and enhanced business solutions in Visio 2000, you can create business drawings that communicate your ideas clearly and effectively. The following are a sample of the drawing types you can create with Visio 2000.

TIP You can view the Standard Edition User Guide in PDF format, or view online Help on the Visio 2000 Standard Edition Test Drive CD.

Process flowcharts

- Use bands in flowcharts to show the relationships of cross-functional processes over time.
- Cross-reference information to processes in or between flowcharts and different shapes in flowcharts using improved shape numbering and off-page reference shapes.
- Import existing flowchart information from other applications using the new Import Flowchart Data Wizard.



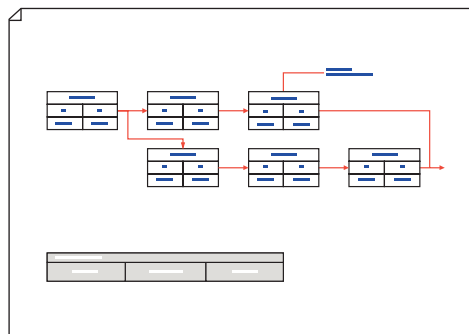
Use audit flowcharts to diagram accounting processes, money management, and financial inventories.

Organization charts

- Build complex organization charts instantly from existing information using a wizard.
- Format and update organization charts with shapes that automatically connect and stay glued as you drop them onto the page.
- Align and format your entire organization chart with a single mouse click, using a floating format palette.
- Show or hide subordinates, or create a synchronized view of your organization chart on a separate page.
- Define how each page of your organization chart will display on the page.
- Import and export information to a file.
- Create a list of changes to the organization chart from one diagram to another.

PERT charts

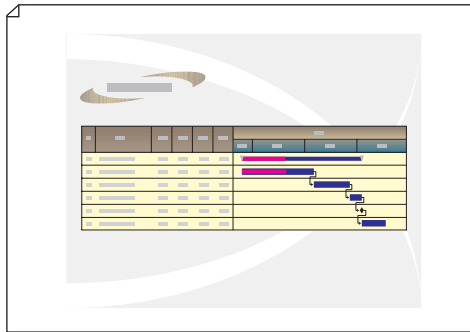
- Create high-level projects quickly and easily using preconfigured PERT (Program Evaluation and Review Technique) chart shapes.



Use PERT charts to organize tasks and timeframes during the beginning of your project.

Gantt charts

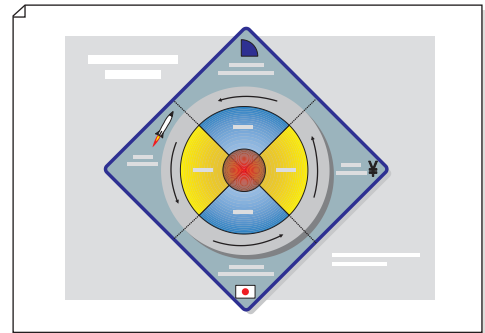
- Add and delete columns for information such as Start Date, End Date, and Duration in project timeline charts, called Gantt charts.
- Perform common tasks such as linking and unlinking tasks, and promoting, demoting, and deleting tasks, by using the Gantt Chart toolbar or Gantt chart menu commands.
- Import files in Microsoft Project format and display the data in a Visio 2000 Gantt chart, in MPX format.



Plan, modify, and link tasks using project timelines, called Gantt charts.

Presentation graphics

- Use new backgrounds, borders, titles, Internet buttons, and 3-D network shapes to add visual power to your Visio drawings or diagrams.
- Create a more polished presentation in a fraction of the time with enhanced Microsoft PowerPoint compatibility.



Create marketing mix diagrams to illustrate tools you can tailor to your marketing objectives.

Calendars

- Create monthly and yearly calendars, add special dates and shapes, and then set the format you want to use.

Maps

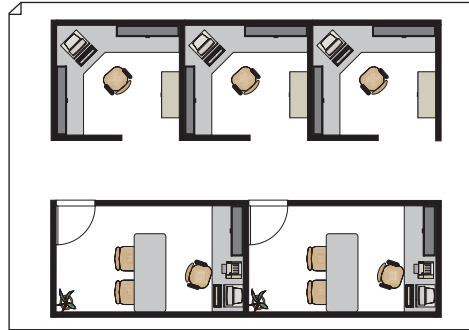
- Add new custom line styles for roads and railroad tracks in directional maps to make them look more realistic.
- Add intelligence to sign shapes in directional maps, so they pick up road types based on styles and legend/key shapes.
- Display features such as lakes or rivers on more detailed geographic maps.



Create easy-to-read directional maps that use clearly identifiable roadways, metro routes, and landmarks.

Office layouts

- Quickly lay out office floor plans using room and space shapes to automatically create walls and dimension lines.








Create accurately scaled office layouts to prepare for space planning, office moves, or remodeling.

Drawings and diagrams for all your business needs

Visio 2000 is ideal for creating smart business drawings or diagrams quickly. The following table outlines the wide range of business drawing and diagram types you can create using Visio 2000. Locate your job or business

category at the top of the table, and then find the drawing type you want below the heading. Then, use the columns at the far left (and right) to see which Visio 2000 solution contains that drawing type.

	Management	Operations	Sales and Marketing
 Flowcharting	<ul style="list-style-type: none"> • Cost/benefit analysis • Process analysis • Cross-functional diagrams • TQM/business process re-engineering 	<ul style="list-style-type: none"> • Human resources processes • Information flow • Web diagramming • Recruiting processes • Benefits handling 	<ul style="list-style-type: none"> • Order processes • Information flow • Marketing collateral materials • Work flow diagrams
 Organization Charting	<ul style="list-style-type: none"> • Organizational design • Hierarchy of management and departments 	<ul style="list-style-type: none"> • Organizational design • Hierarchy of information services • Hierarchy of human resources 	<ul style="list-style-type: none"> • Departmental hierarchy for managing commissions • Hierarchy of sales contacts within the company
 Project Timelines	<ul style="list-style-type: none"> • Resource planning • Process improvement schedules • Annual report timelines 	<ul style="list-style-type: none"> • Project planning • Hiring process milestones • Information services projects 	<ul style="list-style-type: none"> • Product delivery and customer communication tracking • Schedules for marketing collateral materials
 Block Diagrams/Custom Shapes	<ul style="list-style-type: none"> • Public relations presentations • Cost/benefit analysis • Presentation graphics • Proposal visuals 	<ul style="list-style-type: none"> • Human resources data presentations • Presentation graphics • Proposal visuals 	<ul style="list-style-type: none"> • Product modeling • Proposal visuals • Presentation graphics • Order creation
 Marketing Diagrams	<ul style="list-style-type: none"> • Annual reports • Public relations campaigns • Sales demonstrations • Board member presentations 	<ul style="list-style-type: none"> • Budget proposals for new equipment • Facilities management proposals • Annual reports 	<ul style="list-style-type: none"> • Market regions • Relationships with customers • Competitive analysis

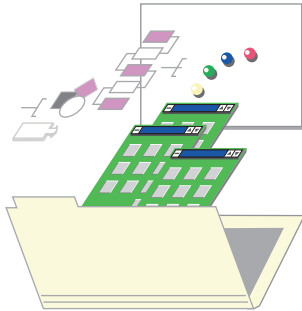
Finance/Accounting/Banking	Project Management	Insurance/Health/Law	
<ul style="list-style-type: none"> • Audit and work flows • Fiscal management • Accounting processes • Annual reports • TQM/process analysis 	<ul style="list-style-type: none"> • Work flow management • Manufacturing processes • Mind Mapping • Decision-making processes • TQM/process analysis 	<ul style="list-style-type: none"> • Claims processing • Work flow management • Accident report flow • Fraud tracking • Risk assessment 	 Flowcharting
<ul style="list-style-type: none"> • Hierarchy of signing authority • Cross-functional diagrams 	<ul style="list-style-type: none"> • Design team structure • Work breakdown structures • Cross-functional diagrams 	<ul style="list-style-type: none"> • Claimant relationships • Hierarchy of health care workers • Hierarchy of staff 	 Organization Charting
<ul style="list-style-type: none"> • Process improvement schedules • Accounts receivable and payable timetables 	<ul style="list-style-type: none"> • Project life cycles • Schedules • Timetables • Gantt charts 	<ul style="list-style-type: none"> • Document claim status and milestones • Court date timetables 	 Project Timelines
<ul style="list-style-type: none"> • Statistics • Figures display for presentations • Elements of financial programs 	<ul style="list-style-type: none"> • Product design specifications • Product prototyping • Presentation graphics • Proposal visuals 	<ul style="list-style-type: none"> • Accident reports • Incident drawings • Presentation graphics • Proposal visuals 	 Block Diagrams/Custom Shapes
<ul style="list-style-type: none"> • Presentations to investors • Presentations to general public • Public relations campaigns 	<ul style="list-style-type: none"> • Product/feature comparison • Business planning documents • R&D presentations 	<ul style="list-style-type: none"> • Presentations for court cases • Graphics for insurance presentations • Board meeting presentations 	 Marketing Diagrams

Visio basics

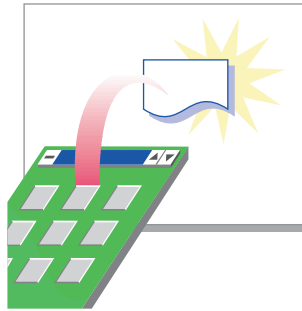
The Visio 2000 products share a core set of features. This means that you can use the same basic methods to work with all of the Visio 2000 programs to create your drawings.

The illustration below shows five steps that are common to making any Visio 2000 drawing. The following page shows the actual workspace you'll use to create Visio drawings.

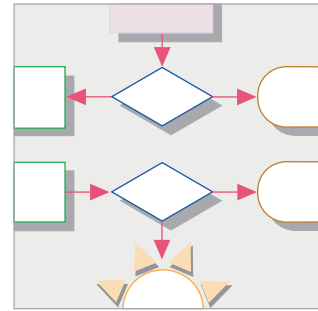
Five steps to making a Visio drawing



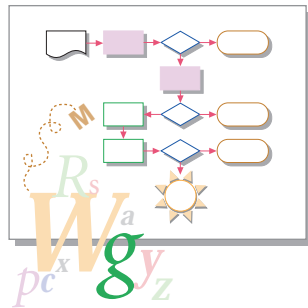
1 Start a drawing or diagram by opening a drawing type, or template.



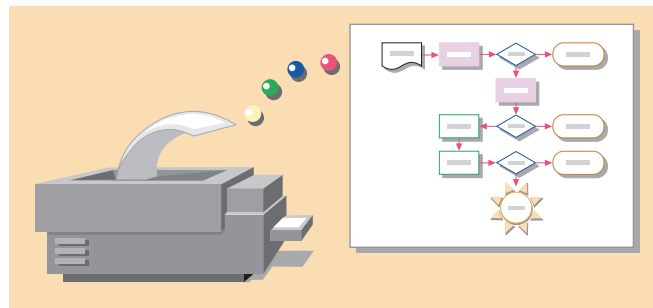
2 Add shapes by dragging them from the stencil and dropping them onto the drawing page.



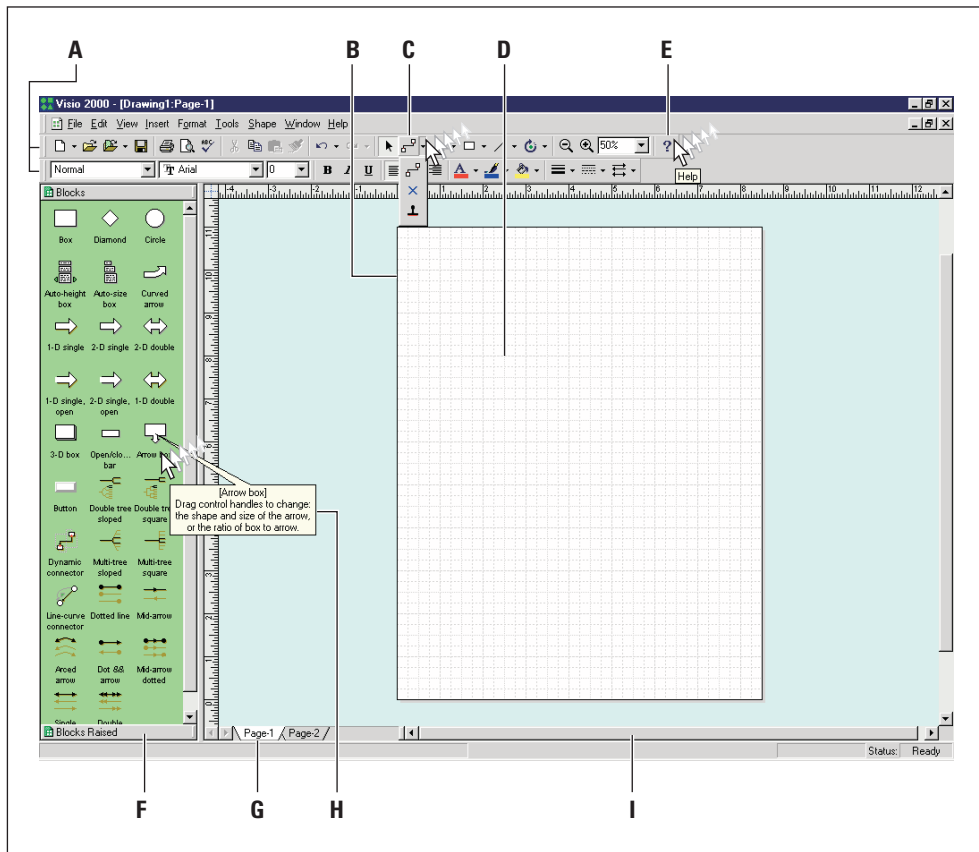
3 Connect the shapes in your drawing.



4 Add text to shapes in your drawing, and add independent text for titles.



5 Publish your drawing to the Web, or print your drawing to share it with others.



The Visio 2000 workspace

Each drawing type opens with stencils, shapes, and toolbars appropriate to that drawing type.

- A** Tools are grouped in functional sets on toolbars. You can specify which toolbars you want to display by choosing View > Toolbars.
- B** The drawing page opens with size, orientation, scale, grid, and measurements appropriate for the drawing type.
- C** You can find additional related tools by clicking the arrows next to the button.
- D** You can use the drawing page grid to align shapes to each other.
- E** ScreenTips appear when you pause the mouse pointer over a toolbar button.
- F** Stencils, or collections of masters, dock to the left of the drawing page, by default.
- G** With page tabs you can quickly insert new pages, navigate multiple-page drawings, delete pages, rename pages, and reorder pages.
- H** Masters are shapes you can add to your drawings. To quickly view information about a shape, pause the mouse pointer over a shape.
- I** When your drawing has multiple pages, you can move the horizontal scroll bar to view all of the page tabs.

Starting a drawing



To locate a specific shape quickly, use the Shape Explorer™ window. Choose **Tools > Macros > Shape Explorer**.

When you base a drawing or diagram on a Visio drawing type (also called a template) in Visio 2000, you automatically get all the tools and features you need to create that type of drawing.

For example, to create an organization chart, open the Organization Chart drawing type.

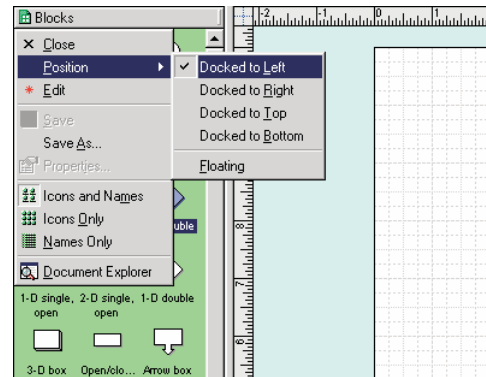
To start a drawing

- 1 Start Visio 2000. In the Welcome To Visio 2000 dialog box, click OK.
- 2 In the Choose Drawing Type dialog box, click a category name, such as Block Diagram.
- 3 In the Drawing Type box, double-click the template you want to open, such as Basic Diagram.

A drawing page appears, with the stencils and tools you need to begin your drawing.

Working with stencils and shapes

When you start a new drawing or diagram by opening a template, Visio 2000 opens one or more task-related stencils. Stencils contain shapes you can drag onto the drawing page to create your drawing. You can move stencils in the drawing window to create more workspace by floating, minimizing, or docking them somewhere else.



You can dock or “float”—make movable—stencils as you work on your drawing.

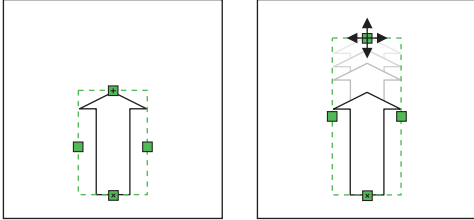
TIP To open additional stencils, choose **File > Stencils > Open Stencil**, choose the stencil you want to open, and then click OK.

To add a shape to your drawing

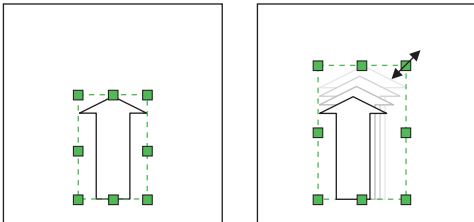
- 1 On a stencil, point to the shape you want to add to your drawing.
- 2 Hold down the mouse button and drag the shape to the location you want on the drawing page, and then release the mouse button.

Using 1-D and 2-D shapes

Visio shapes can be one-dimensional (1-D) or two-dimensional (2-D).



1-D shapes behave like lines and display endpoints you can drag to resize the shapes when you select them with the pointer tool.



2-D shapes have corner handles you can drag to resize the shapes proportionally, and side selection handles you can drag to resize them horizontally or vertically.

Aligning shapes with the dynamic grid

You can use a dynamic grid (dashed lines) to indicate the location for the next shape you drag onto the page, based on the location of shapes already on the page. As you move a shape on the page you can place it precisely using dynamic grid lines to align the shape with other shapes in your drawing.

To turn on the dynamic grid

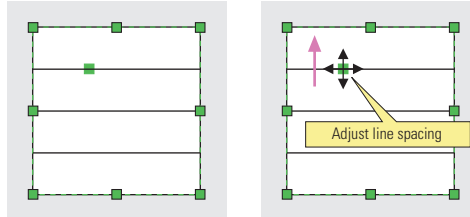
- Choose Tools > Snap & Glue, and then check Dynamic Grid.

When you drop a shape onto the drawing page, Visio 2000 snaps the shape to the nearest grid line so you can position it precisely in your drawing.

Using shape handles

Visio shapes have handles you can use to resize or move the shape, or to change the shape's appearance, position, or behavior. You use selection handles (■) to resize shapes, and control handles (■) to perform actions that are unique to the particular shapes on which they appear.

For example, you might use a control handle to adjust the position of a shape or move a line in a shape.



The control handle looks just like a selection handle, but has darker shading.

To see a ScreenTip for what a control handle does, pause the pointer over the control handle.




You can view the Standard Edition User Guide in PDF format, or view online Help on the Visio 2000 Standard Edition Test Drive CD.

Moving and resizing shapes



Moving Visio shapes is as easy as selecting the shapes and then dragging the selection to the new location in your drawing or diagram. You can resize shapes quickly by simply dragging selection handles.

NOTE When you drag a shape to resize it, you can see exactly how the shape changes as you drag. If the shape has text associated with it, the text resizes accordingly.

To move or resize a shape

- 1 To move the shape, select the shape with the pointer tool () , hold down the mouse button while dragging the shape to the location you want in your drawing, and then release the mouse button.

The pointer turns white when the shape is movable.

- 2 To resize a selected shape, point to a selection handle () until the pointer changes to a four-headed arrow () , and then drag the handle to change the size.

To move multiple shapes at once

- 1 Click to select a shape, and then hold down the Shift key and click the other shapes you want to select.
- 2 Place the pointer over one of the shapes until the pointer turns white.

- 3 Drag the shape to its new position.

All selected shapes move the same distance and direction from their original positions.

TIP To limit the movement of shapes to horizontal or vertical, hold down the Shift key while you drag the shapes.

Quick editing with anchored windows

You can perform quick editing tasks such as changing a shape's size and position, or editing a shape's custom properties directly in the drawing window using anchored windows. You can set anchored windows to AutoHide, when you're not using them, and conveniently tuck them away until you want to use them again.

Anchored windows in Visio 2000

Window	Purpose
Pan & Zoom window	Easily zoom in or out with increased precision
Custom Properties window	View and edit a shape's custom properties
Size & Position window	Change a shape's size, position, or rotation
Drawing Explorer window	View all of the elements in your document

To open an anchored window

- Choose View > Windows, and then click the name of the anchored window you want to open.

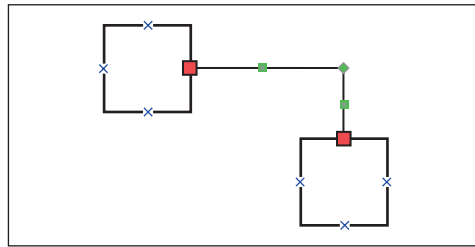
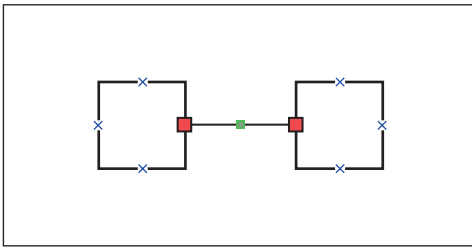
Connecting shapes

Flowcharts, organization charts, block diagrams, and network diagrams are all connected drawings—drawings that show relationships between shapes.

You can use two types of connections in Visio 2000, shape-to-shape and point-to-point. The type of connection you use depends on how much control you want over your drawing.

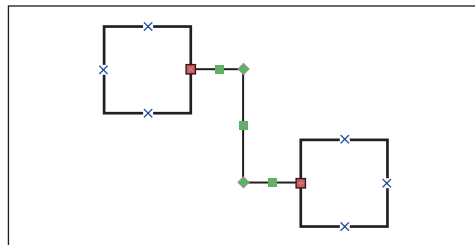
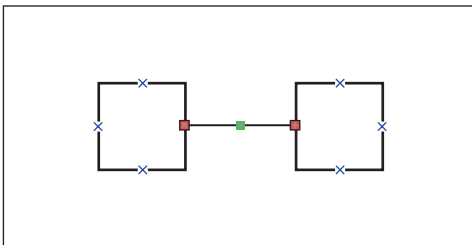
With shape-to-shape connections, Visio 2000 maintains the most direct connection between the actual connection points. This means that the actual points of connection might change when you move the connected shapes in relation to each other.

With point-to-point connections, the actual points of connection stay the same no matter how you move the connected shapes.



Shape-to-shape connections


When you move shapes that have shape-to-shape connections, the connector attaches at the closest point between the shapes, which might be different from the original connection points.



Point-to-point connections

When you move shapes that have point-to-point connections, no matter how you arrange the shapes in relation to each other on the drawing page, the shapes maintain their original connection points.

To connect shapes automatically, shape-to-shape

- 1 Click the connector tool () on the Standard toolbar.
- 2 Drag a shape from a stencil onto the drawing page.
- 3 While the shape is still selected, drag another shape from a stencil onto the drawing page.
The shapes are automatically connected shape-to-shape.

To connect shapes automatically, point-to-point

- 1 Use the pointer tool to drag two shapes, one at a time, from a stencil onto the drawing page.
- 2 From the Standard toolbar, click the connector tool, and then drag from the connection point on the first shape to a connection point on the second shape.
The connection points turn red and the shapes are connected point-to-point.

Refining a drawing

Using Visio 2000 you can enhance and modify drawings by

- Adding text and color to shapes.
- Changing the direction of shapes by flipping and rotating them.
- Creating groups of shapes you can move as single units.
- Displaying a background image, such as a company logo, on multiple drawing pages.

As you refine your drawing it's a good idea to periodically save your work. Then, when your drawing looks the way you want, you can print copies for distribution.


Adding and changing text

Text can clarify the meaning of your Visio drawings or diagrams, and you can use text to document changes you or other Visio users make to a drawing. You can turn on the text ruler to help you format text in a shape as you edit it.

To add text to a shape

- Select the shape, and then type the text you want.

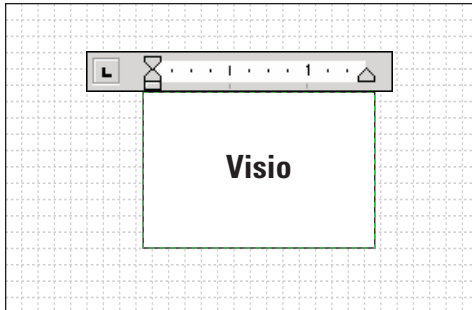
To edit existing text

- Double-click the shape to open the shape's text block, and then type. You can also click the Text tool () on the Standard toolbar, click the text, and then type.

To turn on the text ruler

- 1 Double-click a shape to open the shape's text block.
- 2 Right-click the shape with its text block selected, and then choose Text Ruler from the shortcut menu.

The text ruler appears above the shape.



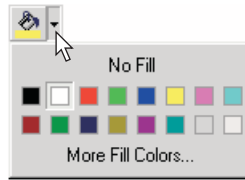
You can quickly change the settings for the selected text by dragging the tab stops and indent markers to the location on the scale you want in the text editing window.

Adding color and line styles to shapes

You can add color to shapes and instantly make your drawings more visually dynamic. You can also change the format of lines and line ends in your drawings. By applying line ends, you can turn any line into an arrow.

To view the fill color palette

- Click the arrow next to the Fill Color button on the Format toolbar.



Click More Fill Colors on the fill color palette for additional colors.

To apply color to a shape

- Select the shape and choose the fill color you want to use from the fill color palette.

To format a line style

- Select the shape and choose the Line Weight, Line Pattern, and Line Ends buttons on the Format toolbar to select the formatting you want to use.

Flipping and rotating shapes

You can change the direction and angle shapes face in your drawings by flipping and rotating them. Select shapes and then use commands on the Tools menu or buttons on the Action toolbar to flip and rotate shapes.

To view the Action toolbar

- Choose View > Toolbars > Action.

Flip and rotate shapes with Action tools

Action	Tool
Flip a shape horizontally	
Flip a shape vertically	
Rotate a shape right	
Rotate a shape left	



You can import a graphic from another program to use in your drawing. Choose Insert > Picture, select the file format or type the path and name of the file you want to import, and then click Open.

Grouping shapes

You can group shapes so they function as a unit and so that you can regularly use them together.

To create a group

- 1 Drag the shapes you want to group, one at a time, from a stencil onto the drawing page.
- 2 Select the first shape, hold down the Shift key, and then click to select the other shapes one at a time.
- 3 Choose Shape > Grouping > Group.

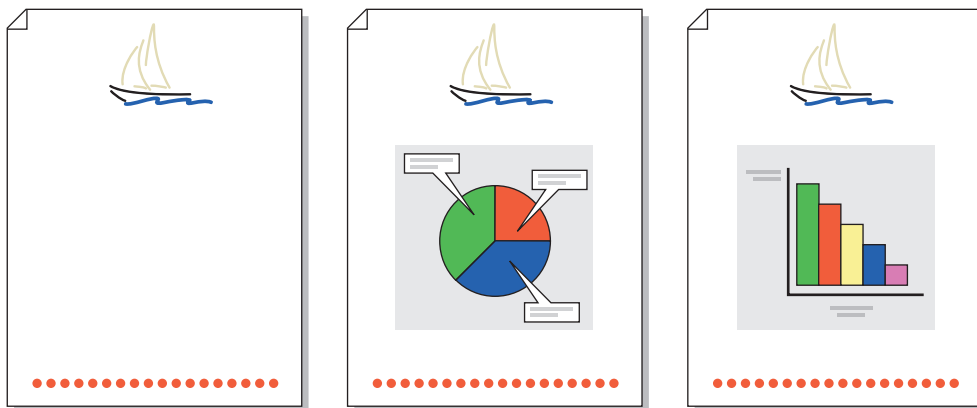
Using background pages to display common page elements

If you want a common element to appear on more than one drawing, you can create a background page that contains the logo graphic, and then assign it to the foreground page.

To create a background for a drawing

- 1 Right-click a page tab (Page-1) in the lower left corner of the drawing window, and then choose Insert > Page from the shortcut menu.
- 2 On the Page Properties tab, for Type, click Background.
- 3 If necessary, click the Drawing Scale tab to change the scale or the Page Size tab to change the page size for the new page, and then click OK.
- 4 Place the design element you want to use as a background onto the drawing page.

Using background pages



Use backgrounds to repeat a common element on several drawings. For example, the sailboat appears on each of these three pages.

To assign a background to a drawing

- 1 Display the page to which you want to assign the background.
- 2 Choose File > Page Setup, and then click the Page Properties tab.
- 3 In the Background list, select the name of the background that you want to assign, and then click OK.

The background appears behind the shapes on the foreground page.

To display a background so you can edit it


- Display the page to which the background is assigned, and then choose Edit > Go To > Background.

Saving and printing your drawings

The first time you save a drawing, Visio 2000 prompts you for document properties, such as whether or not to save a preview, a small thumbnail version of the drawing. The properties you specify appear in the Open dialog box when you select the drawing file name.

To save a drawing for the first time

- 1 Choose File > Save or Save As.
- 2 For File Name, type a name for the drawing file.
- 3 Under Save In, open the folder in which you want to save the file.
- 4 Click Save.
- 5 In the Properties dialog box, enter the information you want, and then click OK.
- 6 Click Save.

You can print your drawings by choosing File > Print or clicking the Print button () on the toolbar.

Using flowcharts to analyze your business

Using Visio 2000, you can diagram complex business processes to make them easy for others to understand. Flowcharts are visual representations of a process and are frequently referred to as process flowcharts. Managers often create process flowcharts to help them


understand and communicate how a process works and how it can be improved.

Visio 2000 provides a number of flowchart diagram types, as shown in the table below.

Flowchart diagram types in Visio 2000

Flowchart type	Purpose
Audit Diagram	Use to create auditing flowchart diagrams for accounting, financial management, fiscal information tracking, money management, decision flowcharts, and financial inventories.
Basic Flowchart	Use for flowcharts, top-down drawings, information tracking drawings, process planning drawings, and structure prediction diagrams.
Cause-And-Effect Diagram	Use for drawings that illustrate problem-solving.
Cross-Functional Flowchart	Use to create drawings that illustrate the relationships between process and the organization.
Data Flow Diagram	Use for process- or data-oriented models, data flowcharts, data process diagrams, structured analysis diagrams, and information flow diagrams.
IDEF0 Diagram	Use IDEF0 process charting models to create hierarchical diagrams for model configuration management, needs and benefits analyses, requirements definitions, and continuous improvement models.
SDL Diagram	Use the Specification and Description Language (SDL) to create object-oriented diagrams for communication and telecommunication systems and networks.
TQM Diagram	Create Total Quality Management drawings for business process re-engineering, total quality management, continuous improvement, and quality solutions.
Work Flow Diagram	Represent information flow, automation of business processes, business process reengineering, accounting, management, and human resources tasks in industry, business, and manufacturing.

To draw a flowchart using the connector tool

- 1 Start Visio 2000, and then choose File > New > Flowchart > Basic Flowchart.
- 2 Click the connector tool () on the Standard toolbar.
- 3 Drag a shape, such as a Process or Decision shape, from the Basic Flowchart Shapes stencil onto the drawing page.
- 4 Drag a second shape onto the drawing page. The shapes connect.
- 5 Drag enough shapes to build the complete flowchart. Each new shape you drop connects to the selected shape.

Adding information to flowchart shapes

You can add information to shapes in your flowchart to use for reports or for reference. Such information is called a custom property.

To add custom properties to a flowchart shape

- 1 Select the shape.
- 2 Choose Shape > Custom Properties.
- 3 Type the information you want for Cost, Duration, and Resources.

By default, Visio 2000 associates three custom properties, Cost, Duration, and Resources, with every 2-D flowchart shape.

NOTE To associate more information for your flowchart shapes, right-click a shape, and then choose Properties. In the Custom Properties dialog box, click Define. Click New, and then enter information to create a new custom property.

Working with large flowcharts

Visio 2000 provides several useful methods for working with multiple-page flowcharts. For example, you can

- Use shape numbering to cross-reference explanatory notes, or to indicate the sequence of steps in a large business process.
- Use off-page reference shapes to navigate pages in multiple-page flowcharts, or to link to an existing page in your drawing.

To number shapes in your flowchart

- 1 With a flowchart open, choose Tools > Macros > Visio Extras > Number Shapes.
- 2 On the General tab in the Number Shapes dialog box, choose the options you want:

Operation Choose a numbering option.

NOTE If you choose manual numbering, a dialog box appears, prompting you to click a shape to assign the next number. When you finish assigning numbers, click the Close button.

Apply To Choose to apply your numbering assignments to all shapes, or to selected shapes.

Continue Numbering Shapes As Dropped On Page Check to number shapes that you subsequently add to your flowchart.

- 3 Click the Advanced tab and choose the placement and numbering sequence options you want.
- 4 Click OK.



You can view the Standard Edition User Guide in PDF format, or view online Help on the Visio 2000 Standard Edition Test Drive CD.

To connect to a new or existing page in your flowchart using the Off-Page Reference shape

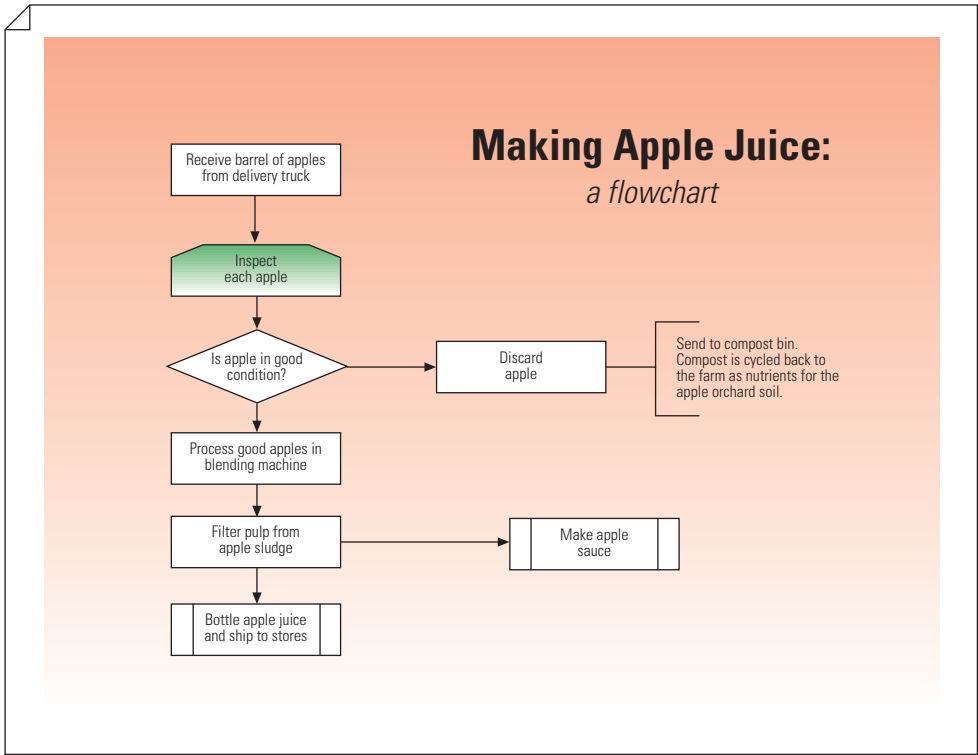
- 1 From the Basic Flowchart Shapes stencil, drag the Off-Page Reference shape onto the drawing page.
- 2 In the Off-Page Reference dialog box, choose the options you want:

New Page Select to create and name a new page, and to add a link from the off-page reference to the new page.

Existing Page Select to add a link from the Off-Page Reference shape to an existing page in the drawing.

Drop Off-Page Reference Shape On Page Check to add an additional Off-Page Reference shape on the page to which this Off-Page Reference shape will be linked.

Use flowcharts to illustrate processes



Create flowcharts to describe or analyze processes, document procedures, indicate work or information flow, track cost and efficiency, and more.

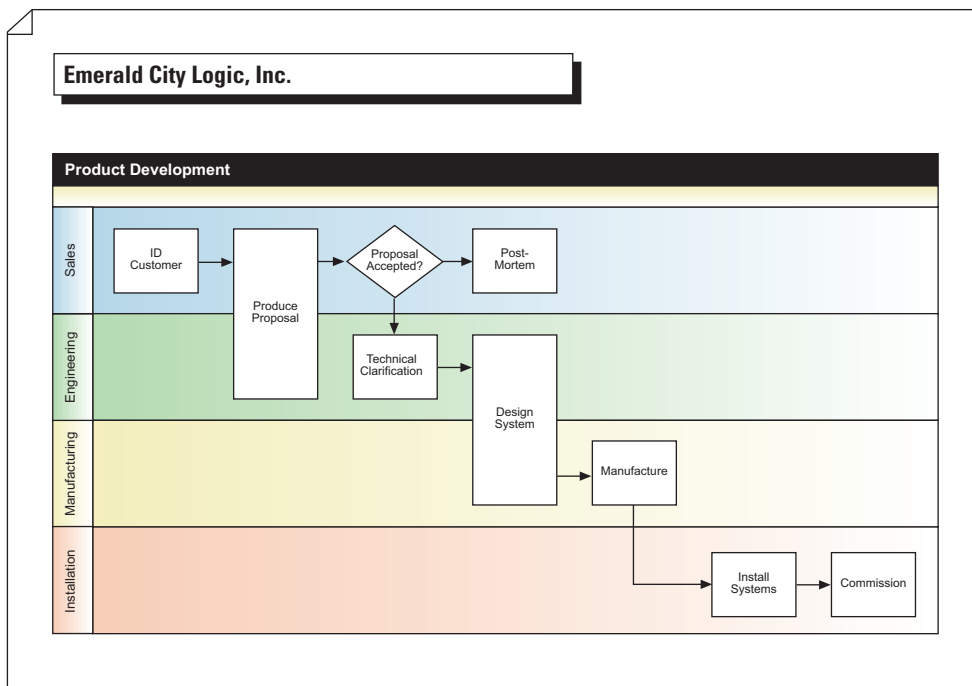
Keep Shape Text Synchronized Check if you want text on both of the Off-Page Reference shapes to reflect changes when you add, modify, or delete the text for one of them.

Insert Hyperlinks On Shapes Check if you plan to save the drawing in HTML format for publication to a Web site and you want to create links between the shapes.

Creating horizontal or vertical cross-functional flowcharts

You can create either horizontal or vertical cross-functional flowcharts depending upon which layout best conveys your information.

3 Click OK.




Cross-functional flowchart

This cross-functional flowchart uses horizontal functional bands to illustrate how processes flow through and affect departments.



You can easily add a color scheme to your drawing. Choose Tools > Macros > Visio Extras > Color Schemes, and then choose the color scheme you want, or create a new one.

To create a horizontal or vertical cross-functional flowchart

- 1 Choose File > New > Flowchart > Cross-Functional Flowchart to open the Cross-Functional Flowchart solution.
- 2 Choose an orientation for the bands in your flowchart, the number of bands (up to five), and whether you want to add a title bar to the top of the bands, and then click OK.
- 3 Click the title bar to select it and then type a name for the process the drawing represents. Click a band label to select it and then type a name for the band. Repeat for each band.
- 4 Drag a flowchart shape from the Basic Flowchart Shapes stencil to the appropriate location on a band or across bands to represent the first step in the process.
- 5 Click the connector tool () on the Standard toolbar. With the first shape still selected, drag a second shape onto the drawing page.
- 6 Continue adding shapes until all the shapes you want are on the page. Each new shape you add connects to the shape that is selected at the time you add it.

Importing flowchart data from other applications

You can use Visio 2000 to automatically create a flowchart from information in a text file or in Microsoft Excel format. You can either import this information from a program that supports flowchart data export, or you can create a new text file (.txt) or Excel file (.xls) using the

Import Flowchart Data Wizard, and then create your flowchart from that data.

To import flowchart data

- 1 Choose Tools > Macros > Flowchart > Import Flowchart Data Wizard.
- 2 Follow the instructions on the wizard screens to
 - Create a flowchart from imported data in a text (.txt) or Excel (.xls) file.
 - Create a new text file or Excel file that you can use to create a flowchart automatically.

Adding business backgrounds to your flowcharts

Choose from 30 new professional borders and titles and 18 new backgrounds to create flowcharts that communicate your business ideas effectively and dynamically.

To add a background

- 1 Click the title bar of the Backgrounds stencil to make it active.
- 2 Drag the background shape you want onto the drawing page.
- 3 In the Make Background dialog box, click Yes.

The background is automatically assigned to your drawing and a new background page tab appears at the bottom of the drawing window.

NOTE *Not all of the Visio 2000 templates open the Backgrounds stencil automatically. To open the Backgrounds stencil, choose File > Stencils > Visio Extras > Backgrounds.*

Charting your organization

The Organization Chart solution provides features you can use to view your entire company or specific departments at a glance.

You can

- Change the layout of your chart with a single click of a toolbar button.
- Generate organization charts instantly from existing data using a wizard.
- Quickly change the design and color of the position shapes in your chart.
- Store information about employees, such as salary, title, department, and phone number.

Creating simple organization charts

Creating organization charts is easy using Visio 2000. Just drop shapes on top of shapes they report to, and Visio 2000 automatically connects and aligns them.

To create a simple organization chart by dragging shapes

- 1 Start Visio 2000, and then choose File > New > Organization Chart > Organization Chart.
- 2 From the Organization Chart Shapes stencil, drag the Executive shape onto the drawing page.
- 3 With the shape selected, type the person's name.
- 4 Press the Enter key, type the person's title, and then click anywhere outside the shape.
- 5 Drag a Manager shape directly onto the Executive shape to establish a reporting relationship. Add a name and title to the shape. Repeat until you've added all the managers you want.

NOTE *Connector shapes are added automatically when you drop a shape on top of a shape it reports to.*

- 6 To establish a reporting relationship to the Manager, drag a Position shape directly on top of a Manager shape. Repeat to add more positions.

As you add shapes, Visio 2000 automatically realigns all of the reporting shapes to make room for the shapes you add.

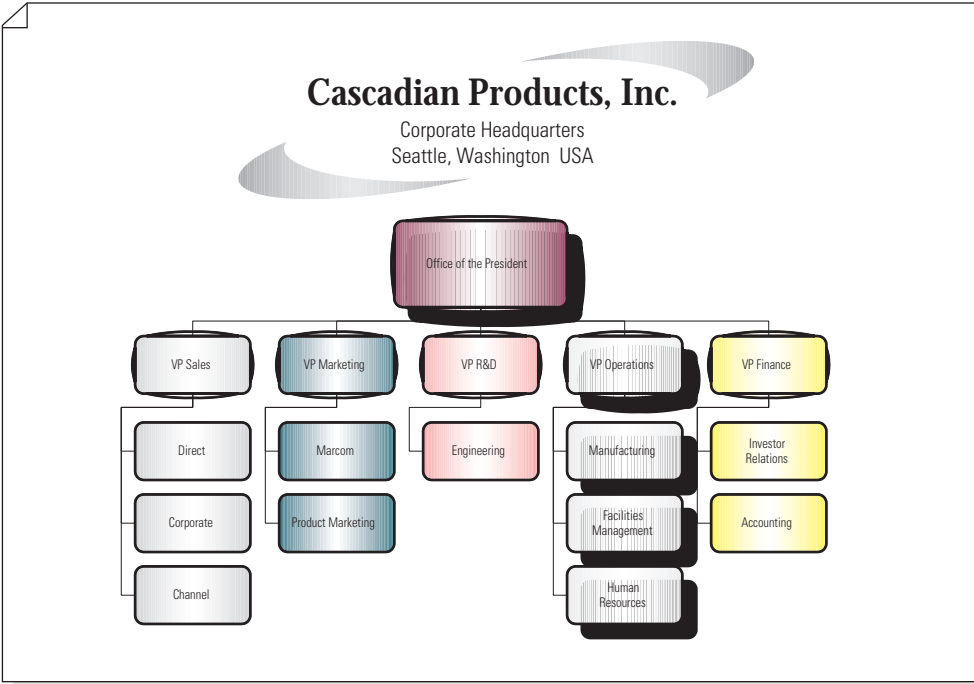
Adding multiple shapes to
your chart

You can use the Multiple Shapes shape on the Organization Chart Shapes stencil to add from 1 to 50 shapes of the same type to your drawing.

To add multiple shapes to your chart

- 1 From the Organization Chart Shapes stencil, drag the Multiple Shapes shape onto the drawing page.
- 2 In the Add Multiple Shapes dialog box, enter the number of shapes you want to add, select the position you want under Shape, and then click OK.

Sample
organization chart



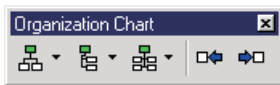
Organization charts show hierarchies of positions and departments. You can quickly add color to differentiate departments and positions in your chart.

Changing the layout of shapes in your organization chart

You can change the layout of your organization chart whenever you want to modify the configuration of departments and positions in your drawing.

To change the layout of shapes in your chart

- 1 With an organization chart open, select the shape having subordinates whose layout you want to change.
- 2 On the Organization Chart toolbar, click the arrow to the right of the button for the layout you want, and then click the layout button you want.



The Organization Chart toolbar is displayed by default so you can quickly change the hierarchical structure of departments and move shapes.

Adding information to your organization chart shapes

You can add information to shapes in your organization chart to use for reports or for reference. Such information is called a custom property.

To add information to an organization chart shape

- 1 Select the shape.
- 2 Choose Shape > Custom Properties.

- 3 In the Custom Properties dialog box, type the information you want for Department and Telephone.

By default, Visio 2000 associates two custom properties, Telephone and Department, with organization chart position shapes.

NOTE To associate additional information for your organization chart shapes, right-click a shape, and then choose *Properties*. In the *Custom Properties* dialog box, click *Define*. Click *New*, and then enter information to create a new custom property.



*To quickly convert an organization chart shape type into another position shape, right-click the shape, choose *Convert Shape*, and then select the position you want.*

Creating large organization charts across multiple pages

Visio 2000 makes it easy to manage large organization charts that span multiple drawing pages. You can determine how much of your chart you want to display at any time. You do this by creating a copy of a top level position or department (called a synchronized copy) from the original page of your chart on a new drawing page, and then hiding subordinate positions on the original page. Changes you make to any repeated shape carry over to each appearance of that shape, and you can view or hide subordinate positions on any page of your chart simply by right-clicking the shape and choosing a menu command.

TIP To show or hide a synchronized copy of a shape, right-click the shape, and then choose *Show Subordinate* or *Hide Subordinate*.



When you use the Copy and Paste commands, or Ctrl+drag to copy synchronized shapes in organization charts, the shapes you copy are not synchronized with the original shapes.

To create a synchronized copy of a department on a new page

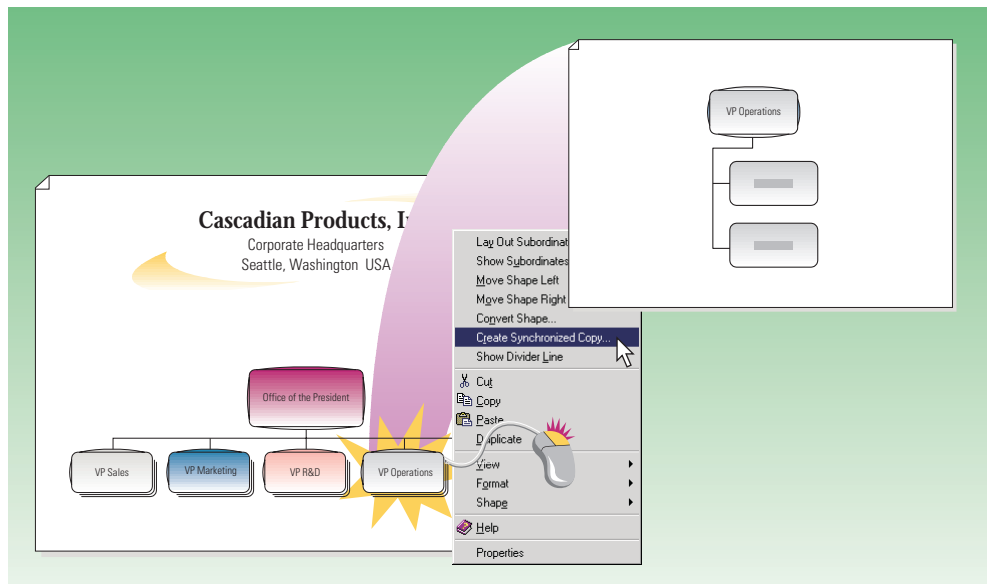
- 1 With your organization chart open, select the shape you want to place at the top level of the new page, and then choose Organization Chart > Create Synchronized Copy.
- 2 Click OK to open a new drawing page that displays a copy of the shape you selected and any shapes that are subordinate to that shape.

If you want to hide the subordinate positions, check Hide Subordinates On Original Page.

The new shapes are synchronized with the original shapes so that changes you make appear in both places.

- 3 To continue building the department, drag new shapes on top of the shape you copied.
- 4 Click the Page-1 tab at the bottom of the drawing page window to go back to your original drawing page.
- 5 To display hidden subordinates, right-click a stacked shape (one that appears to have other shapes under it), and then choose Show Subordinates.

Using synchronized copies in organization charts



When you right-click a position shape and choose Create Synchronized Copy, you can view a top-level position of the department and its subordinates on a new drawing page.

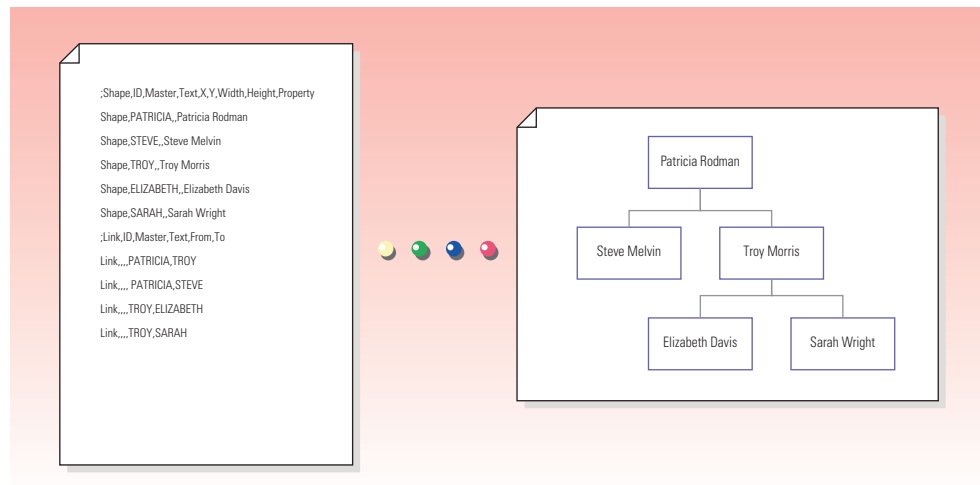
Creating an organization chart from existing information

You can use your organization's electronic data files to create your chart. For example, many corporations use information files such as Microsoft Excel spreadsheets to record and update employee names, titles, reporting structure, and so on. Using the Organization Chart Wizard, you can generate an organization chart from such a data file.

NOTE *If you do not already have a data file, you can run the Organization Chart Wizard to open a data file template in text (.txt) or Excel (.xls) format and build your chart by typing into a spreadsheet format rather than dragging shapes.*

As you proceed through the Organization Chart Wizard, you can specify:

- Data you want the wizard to display on the organization chart shapes, such as Name, Title, and Department.
- Fields from your information file that you want to use as custom properties in your organization chart shapes.
- Whether you or the wizard determine the number of positions to display on each page.



Creating an organization chart from a text file

You can create an organization chart from data in an existing text file using the Organization Chart Wizard.

To create an organization chart from existing information, using the Organization Chart Wizard

- 1 Choose Organization Chart > Organization Chart Wizard.
- 2 Follow the instructions on the wizard screens to create an organization chart from
 - A text file, Microsoft Excel file, or Object ODBC-compliant data source.
 - Information in a Microsoft Exchange Server directory.

NOTE *The Organization Chart Wizard screens open with the settings you chose the last time you used the wizard.*

Using design themes and color schemes in your organization charts

You can change the design and add a color scheme to your chart for visual impact. For example, you might want to use the company colors in your chart for a sales presentation. Using color in organization charts also helps differentiate departments and positions.

To change the design theme for your chart

- 1 Choose Organization Chart > Options.
- 2 In the Options dialog box, select a theme from the Org Chart Theme list, and then click OK.

To add a color scheme to your organization chart

- 1 Choose Tools > Macros > Visio Extras > Color Schemes.
- 2 In the Color Schemes dialog box, select a scheme from the Choose A Color Scheme list, and then click OK.

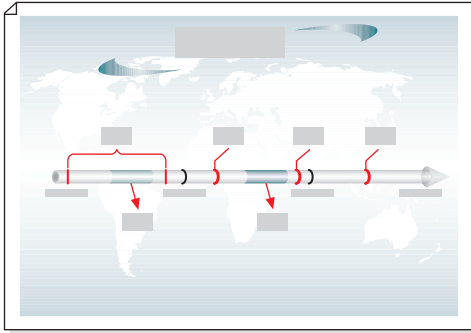
Creating a timeline for a project overview at-a-glance

If your job involves planning projects and processes, you need ways to track tasks and resources. You can use Visio 2000 Standard Edition drawings and diagrams to help you track project milestones, resources, and tasks.

For example, you can

- Show tasks, dependencies, and resource information, such as who is responsible for which tasks, using timeline drawings.
- Display your monthly, quarterly, and yearly goals on calendars.

You can easily distribute your timeline to co-workers or import it into another application. For example, you could import it into Microsoft PowerPoint to use in a presentation.



You can use timelines to communicate major project milestones.

To create a timeline

- 1 Start Visio 2000, and then choose File > New > Project Schedule > Timeline.
- 2 From the Timeline Shapes stencil, drag a Timeline shape onto the drawing page.
- 3 In the Configure Timeline dialog box, do the following:
 - Choose the timeline beginning and end date, the time scale, and the date and time scale formatting.
 - To automatically update the dates on your marker, milestone, and interval shapes when you move them, check Automatically Update Dates When Markers Are Moved.

The Visio program draws a timeline that begins and ends with the dates you chose.

- 4 To add a right or left arrowhead to your timeline, right-click the Timeline shape, and then choose either Show Right Arrowhead or Show Left Arrowhead.

To add a milestone

- 1 From the Timeline Shapes stencil, drag a Milestone shape onto your timeline.
- 2 In the Configure Milestone dialog box, choose the milestone date and the date format you want, and then click OK.

The Visio program positions the milestone on the timeline using the milestone date you chose.

To add an interval

- 1 From the Timeline Shapes stencil, drag an Interval shape onto your timeline.
- 2 In the Configure Interval dialog box, choose the marker beginning date, end date, and date format.

The Visio program positions the marker on the timeline using the marker beginning and end dates you chose.

To revise a timeline

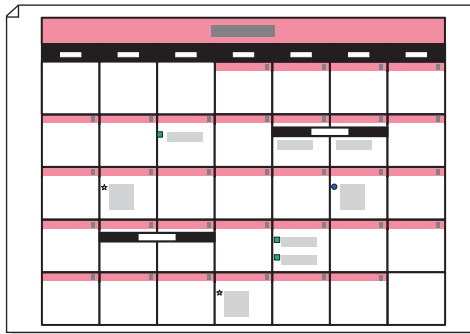
- 1 Right-click the timeline, and then choose Configure Timeline from the shortcut menu.
- 2 In the Configure Timeline dialog box, revise the timeline data, and then click OK.

Creating calendars to stay organized

Planning and tracking resources and tasks for your projects are critical to your success. You can create monthly and yearly calendars to keep an eye on the day-to-day details as well as the big picture.

After entering the calendar information, you can resize your calendar proportionally, label special days, add simple timelines, and add notes to personalize the calendar.

You can create a calendar for a single month on a single page, a calendar for the entire year on a single page, or a calendar for different months on separate pages, all in one Visio drawing file.



Monthly calendars can help you and others plan for project goals and milestones, such as team meetings and presentations. You can use color to highlight important dates.

To create a calendar

- 1 Start Visio 2000, and then choose File > New > Project Schedule > Calendar.
- 2 From the Calendar Shapes stencil, drag the Large Month shape onto the drawing page.
- 3 In the Custom Properties dialog box, choose the calendar properties you want, and then click OK.
- 4 To add text to a day, select the shape, and then type.

To create a yearly calendar on one page

- 1 From the Calendar Shapes stencil, drag the Yearly Calendar shape onto the drawing page.
- 2 In the Custom Properties dialog box, type the year, specify the day on which the week begins, and then click OK.

To create a yearly calendar with months on separate pages

- 1 From the Calendar Shapes stencil, drag the Large Month shape onto the drawing page.
- 2 In the Custom Properties dialog box, type the year, choose the options you want, and then click OK.
- 3 Choose Insert > Page, type a name for the page, and then click OK. Repeat step 2 to create a new month on a separate page.
- 4 Repeat steps 1 through 3 to create all 12 months of the year on separate pages.

Producing marketing diagrams, charts, and matrices

With Visio 2000 you can create many different types of drawings and diagrams to use in your business presentations, and you can make them unique and powerful communication tools for your business ideas.

Choose from more than 75 new marketing shapes to create the following diagrams, charts, and matrices.

Drawings and diagrams

- Process modeling
- Benchmarking
- Simulation and improvement
- Path routing
- Time, cost, and resource analysis
- Activity-based costing
- Product portfolio
- Scope

Charts and matrices

- Product life cycle
- Process and deployment
- Feature comparison
- Bar and line graph
- Pie charts
- Pricing matrices
- Circle spoke

Creating quick marketing diagrams, charts, and graphs

The stencils included in the Marketing Charts And Diagrams and the Charts And Graphs templates provide shapes that represent ready-to-use marketing diagrams, charts, and graphs. Just drag the marketing diagram, chart shape, or graph shape you want from the stencil onto the drawing page, add the text you want, and you are finished. It's that simple.

Although these shapes are predesigned, you can customize them to communicate the information you want.

To create a marketing diagram

- 1 Start Visio 2000, and then choose File > New > Forms And Charts > Marketing Charts And Diagrams.
- 2 From the Marketing Diagrams stencil, drag a marketing diagram shape onto the drawing page.
- 3 Type to add or edit text.



You can import a graphic from another program into your drawing. Choose Insert > Picture, select the file format or type the path and name of the file you want to import, and then click Open.

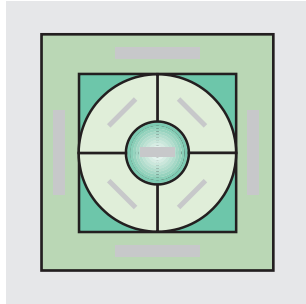
To create a pie chart

- 1 From the Charting Shapes stencil, drag the Pie Chart shape onto the drawing page.
- 2 Right-click the shape and choose Set Number Of Slices from the shortcut menu, select the number of slices you want, and then click OK.
- 3 Right-click the shape and choose Set Slice Sizes. For each slice, enter a number that reflects the percentage you want. When the percentages add up to 100 click OK.

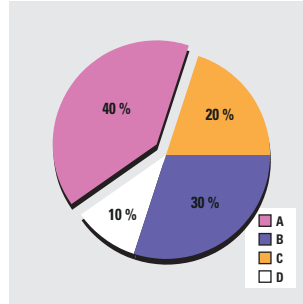
To create a 3-D bar graph

- 1 Choose File > New > Forms And Charts > Charts And Graphs.
- 2 From the Charting Shapes stencil, drag the 3-D Axis shape onto the drawing page.
- 3 Use the control handles on the 3-D Axis shape to customize it.
- 4 Drag Vertical Text 3-D or Horizontal Text 3-D shapes onto the 3-D Axis shape.
- 5 In the Custom Properties dialog box, specify the color you want for the vertical or horizontal bar shapes.

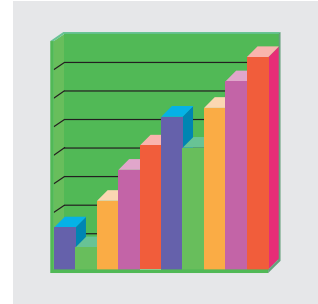
Marketing chart,
pie chart, and 3-D
bar graph samples



Use marketing charts to quickly illustrate your ideas.



Create pie charts to show percentages.



Use 3-D bar graphs to illustrate numerical data quickly and clearly.

Using Visio drawings with Microsoft PowerPoint

You can include Visio drawings in your Microsoft PowerPoint presentations to strengthen and clarify your ideas, as well as to take advantage of the PowerPoint slide features.

To quickly create a drawing for a slide

- 1 In PowerPoint, display the slide you want to add a Visio drawing to, and then choose Insert > Object.
- 2 In the Insert New dialog box, make sure that Create New is selected, select the Visio version you want from the Object Type list, and then click OK.

The Visio dialog box called Choose A Drawing Template opens.

- 3 Choose the Visio drawing template (.vst) you want to use, and then click Open.
If the drawing template you're working in has color schemes available, a dialog box appears asking you if you want to use the PowerPoint color scheme in your Visio drawing.
- 4 Create the drawing in the Visio program, and then click anywhere on the PowerPoint slide to embed the drawing on the slide.

TIP To save a Visio drawing you create in PowerPoint, select the Visio drawing on the slide, and then choose Edit > Visio Object > Open. Finally, choose File > Save As.

Linking drawings into PowerPoint slides

Link a copy of a Visio drawing when you want changes to your original drawing to be reflected in your presentation and you won't need to edit the copy separately in the presentation with Visio tools.

To link a copy of your drawing in PowerPoint

- 1 Open the drawing or diagram you want to link. If it's a multiple-page drawing, display the page you want to appear in the other document.

Only the page you display will appear in the other document.

NOTE Because a link is a reference to a file, you can only link files that are saved to a location on a disk. If you haven't saved the drawing you want to link, choose File > Save.

- 2 Make sure nothing on the drawing is selected, and then choose Edit > Copy Drawing.
- 3 Without closing Visio 2000, open the PowerPoint slide to which you want to link your drawing.
- 4 Choose Edit > Paste Special.
- 5 In the Paste Special dialog box, make sure Visio 2000 Drawing Object is selected, select Paste Link, and then click OK.

The drawing you copied appears in the document, with a link to the original Visio 2000 file.



You can view the Standard Edition User Guide in PDF format, or view online Help on the Visio 2000 Standard Edition Test Drive CD.



When you embed a multiple-page Visio drawing, only the page displayed at the time you choose Copy Drawing appears in the container document.

Embedding drawings into PowerPoint slides

Embed a copy of a Visio drawing when you want to edit the drawing in the presentation, but you don't need those edits to show up in the original drawing.

To embed your drawing in PowerPoint

- 1 Open the Visio 2000 drawing you want to embed and make sure nothing in your drawing is selected.

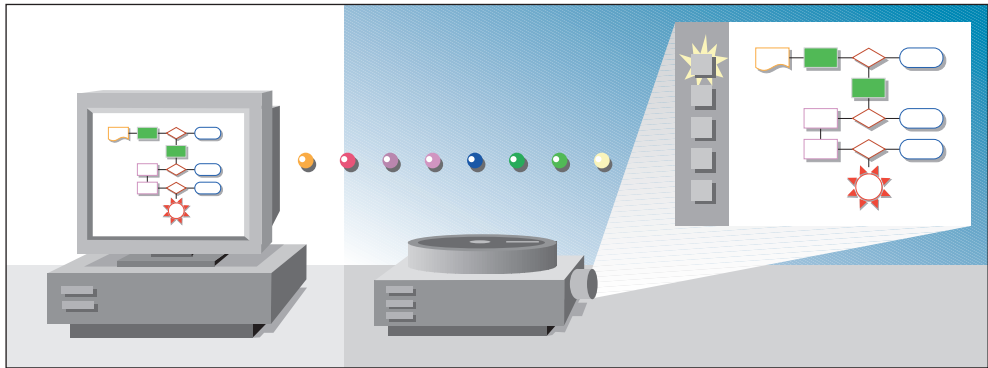
- 2 Choose Edit > Copy Drawing.

This command copies the entire drawing, including shapes on other drawing pages and on background layer pages.

- 3 Open PowerPoint, and then choose Edit > Paste.

NOTE To edit your embedded Visio 2000 drawing directly in PowerPoint, double-click the drawing. Use the special set of Visio tools to edit your drawing, and then click outside the drawing to return to PowerPoint.

Visio drawings in PowerPoint

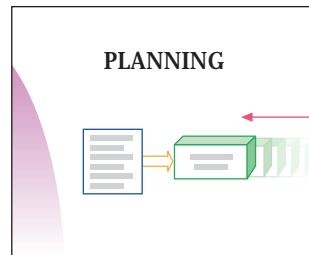
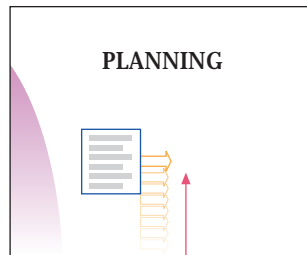
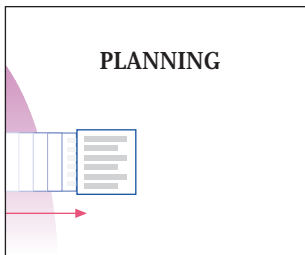


After you create your Visio 2000 drawing, you can use it in a PowerPoint slide presentation.

Using animation and sequential builds in PowerPoint

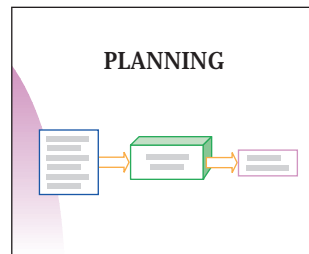
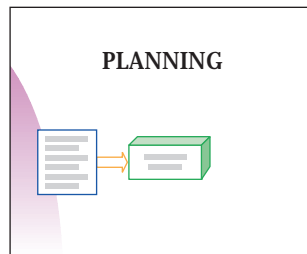
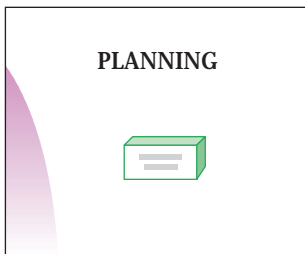
When you use Visio 2000 drawings in PowerPoint, you can introduce complex ideas one element at a time with animated and sequential builds. For example, if you're presenting a planning process, you can

introduce each element of the process in turn, bringing each category of shapes into your presentation only after you've finished discussing the previous category. You can do this two ways, as shown in the illustrations below.



Animated build

Using animation, you can bring elements into your PowerPoint slide one-by-one: from the left, from the bottom, or from the right, by clicking the mouse button.



Sequential build

In a sequential slide of a planning process, each slide adds another element to the drawing. The drawing builds incrementally, one slide after another, instead of using animation.



To test your slides, click the Slide Show button in the lower left corner of the PowerPoint window. Click the arrow, and then choose Next to view the next slide. Repeat to see all of the slides, and then press the Esc key when you're done.

Creating drawings you can animate in PowerPoint

You can control how the categories are presented on the slides so your audience stays focused on the specific topic you're presenting. For example, you can make one element enter the slide from the left and another from the right.

To create animated slides in PowerPoint

- 1 Start Visio 2000, open the drawing you want, select the shapes that make up the first element you want to animate, and then choose Edit > Copy.
- 2 Open the slide you want to use in PowerPoint, and then choose Edit > Paste.
- 3 Continue copying and pasting the elements until you assemble the entire drawing.
- 4 In PowerPoint, right-click the first element, and then choose the animation command.
- 5 Choose the animation options you want in the dialog box, and then click OK.

Using your drawings sequentially in PowerPoint slides

If you want to add drawing elements to your presentation over successive slides, you can paste your entire drawing on one slide, ungroup the shapes, and then copy and paste parts of the drawing onto successive slides. As you show the slides in succession, you present the entire drawing.

To add drawing elements sequentially to slides

- 1 Start Visio 2000, open the drawing you want, make sure nothing is selected, and then choose Edit > Copy Drawing.
- 2 Open the slide you want to use in PowerPoint, and then choose Edit > Paste.
- 3 In PowerPoint, do the following:
 - Select the drawing, click the arrow next to the Draw button in the lower left portion of the window, and then choose Ungroup.
 - Select the element(s) of your drawing that you want to include on the first build slide, and then choose Edit > Copy.
- 4 Navigate to the PowerPoint slide that precedes the one with the pasted Visio 2000 drawing.
- 5 To paste the first element(s) you selected in step 3 from the drawing onto the slide, choose Edit > Paste.
- 6 Navigate to the slide that contains the pasted drawing, select the elements you want to include on the second slide, and then choose Edit > Copy. Repeat until you have copied all the elements.
- 7 Repeat steps 4 through 6 until you've created all the slides in the sequence you need.

Sharing your drawings with others

With Visio 2000, publishing your drawings or diagrams to the Internet or an intranet site is as easy as saving a file. Visio 2000 automatically adds the HTML codes necessary to display the drawing in a Web browser, so all you have to do is make sure your drawing looks the way you want.

You can make your drawing a launching point for users who want more detail and related information by adding hyperlinks to shapes. When users click a “hot” shape, they jump to the linked location.

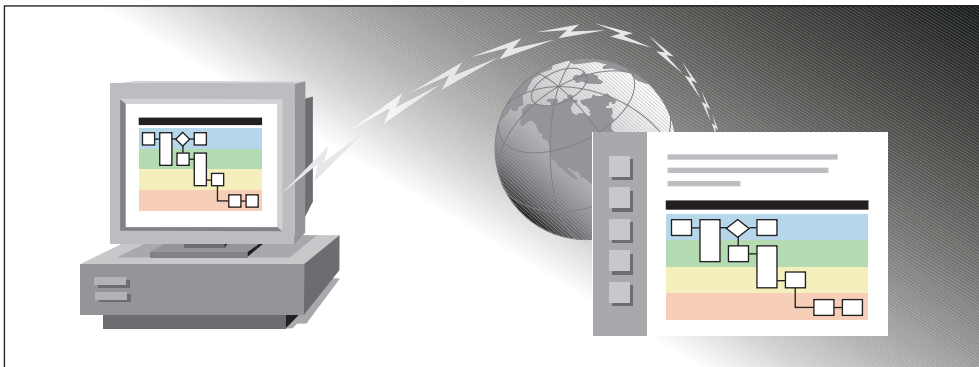
Adding hyperlinks to drawings

You can add one or more hyperlinks to Visio shapes and drawing pages. A link can jump to another page in the same Visio drawing or diagram, another Visio drawing, or a non-Visio document.

When you add hyperlinks to other pages in the same drawing, you can use them to move among pages in the Visio drawing. For example, you can link a Process shape in a flowchart to Total Quality Management (TQM) documentation in a Microsoft Word document for that process.



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Converting Visio drawings to Web pages

You can easily convert Visio drawings to Web pages by saving them in HTML format.

When you link a shape or page to a file, you can decide whether the path to the link should be a relative path or an absolute path.

- **Relative path** A relative path describes the location of the linked file in relation to the Visio drawing or another path, which you can set on the Summary tab of the Properties dialog box (choose File > Properties). You can move the Visio drawing and the linked file together (that is, move the entire path structure) without breaking the link, but if you move the drawing or file separately, you break the link.
- **Absolute path** An absolute path spells out the exact location of the linked file in terms of drive, folder, and file name. You can move the Visio drawing file without affecting the link, but if you move the linked file, you must reset the path.

To link a shape or page to another Visio drawing page, a Web page, or a non-Visio file

- 1 Create or open a Visio drawing. To add a link to a page, display the page with nothing selected. To add a link to a shape, select the shape.

NOTE *If you are linking to a Visio 2000 drawing, make sure to save the drawing so that you can open the source to which you are linking.*

- 2 Choose Insert > Hyperlink.
- 3 Do one of the following:

- To link to a Web site, for Address, type the Web site's URL. If you don't know the URL, click Browse, and then choose Internet Address to open your default Web browser.
 - To link to a file, for Address, click Browse, and then click Local File. Navigate to the file you want, and then click Open. (If necessary, change the type of file in Files Of Type.)
- 4 If you are linking to a file and you want to display a particular page, click Browse next to Sub-Address, select the page you want, and then click OK.
 - 5 Under description, type a name for the link that identifies the location you're linking to.
 - 6 Do one of the following:
 - To specify an absolute path, uncheck Use Relative Path For Hyperlink.
 - To specify a relative path, check Use Relative Path For Hyperlink. To set a path that is not based on the location of the Visio drawing, choose File > Properties. For Hyperlink Base, type the base path that you want.
 - 7 If you want to add another hyperlink for the selected shape or page, click New, and then repeat steps 3 through 6.
 - 8 If you want to link to another page within the document, or to a shape in the document, click the Browse button to the right of Sub-Address, specify the page, shape and zoom level you want, and then click OK.

Converting drawings to HTML

After you create Visio 2000 drawings, you can convert them into Web pages with links to other Web pages by saving them as HTML files.

To convert a drawing to an HTML file

- 1 Open the drawing you want to save as an HTML file, and then choose File > Save As.
- 2 Type a name for the HTML file, using the .htm extension, such as *Drawing.htm*.
- 3 For Save As Type, choose HTML Files (*.htm, *.html), and then click Save.
- 4 In the Save As HTML dialog box, accept the default settings, and then click OK.

You are prompted to view the HTML pages.

- 5 Click Yes to view the new Web pages in your default browser.

NOTE Visio 2000 provides support for VML (Vector Markup Language), which facilitates the exchange, delivery, and editing of high-quality vector graphics on the Web. You must have Microsoft Internet Explorer 5.0 installed to save a drawing in VML format.

Routing your drawings for comments

You can use e-mail to send a Visio drawing or diagram to another user. For example, if you need information from co-workers to complete your drawing, you can route the drawing to them electronically and ask for their comments.

The Visio program also lets you take advantage of Microsoft Office routing features, including sending drawings to Microsoft Exchange folders, adding routing slips to drawings you send by means of e-mail, and adding journal entries to Microsoft Outlook.

NOTE Visio products are compatible with e-mail programs that support the Messaging Application Programming Interface (MAPI) protocol.

To send a drawing with a routing slip

- 1 Display the drawing you want to send, and then choose File > Send To > Routing Recipient.
- 2 In the Routing Slip dialog box, click Address to open your address list, select the individuals or groups to which you want to route your diagram, and then click OK.
- 3 If you want to route the drawing to people in a specific order, select a person's name, and then click the up or down arrow in the Move section to change that person's position in the list.
- 4 Under Route To Recipients, specify whether to route the drawing to one person at a time or to everyone at once.

If you choose to route the drawing to one person at a time, the first person on the list views or updates the drawing, routes the drawing to the next person, and so on.

If you route the drawing to a designated group (called a group alias), all group members will receive the drawing at the same time.



If you receive a routed drawing and want to route it to the next person, choose File > Next Routing Recipient.

- 5 Check Track Status to receive an update as each person on the list passes the drawing to the next person, or check Return When Done if you'd rather not see the drawing again until everyone has seen it.
- 6 Under Message Text, type the text you want in the e-mail message, and then click Add Slip.
- 7 Choose File > Send To > Next Routing Recipient to send the drawing to the first person on the routing list.

Creating your own shapes, stencils, styles, and templates

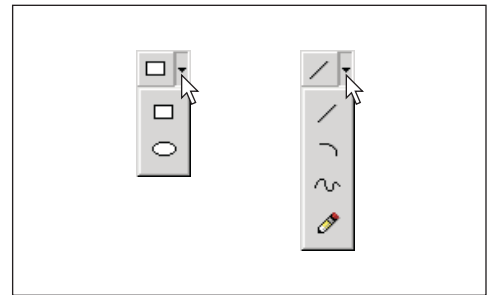
As well as providing you with ready-to-use solutions, Visio 2000 gives you the flexibility to build your own. You can create your own shapes, stencils, styles, and templates that you and others can reuse. You can even build your own toolbars and menus that contain the tools and commands you use most frequently.

Creating your own shapes

There are several ways you can create your own shapes in Visio 2000. You can use Visio drawing tools to create a shape from scratch, merge a shape with other shapes to create a new unique shape, or revise an existing shape.

To draw a shape from scratch using the Visio drawing tools

- Choose a drawing tool from the Standard toolbar, and then click and drag on the drawing page to create the shape you want.



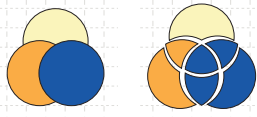
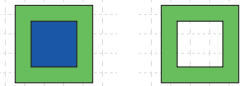




Click the arrow next to the rectangle tool and the line tool to see more Visio drawing tools.

To merge existing shapes to create new shapes

- 1 Select the shapes in your drawing that you want to use to create a new shape.
- 2 Choose Shape > Operations, and then choose the appropriate command.

NOTE *The new shape you create using any shape operations command inherits the formatting of the first shape you selected.*

Using shape operations commands

Command	Result	Example
Fragment	Breaks a shape into smaller parts or creates new shapes from intersecting lines or from 2-D shapes that overlap.	
Combine	Creates a new shape from selected shapes. If the selected shapes overlap, the area where they overlap is cut out (discarded), creating a cookie-cutter effect.	
Union	Creates a new shape from the perimeter of two or more overlapping shapes.	
Subtract	Creates a new shape by subtracting the area where selections overlap from the primary selection.	
Intersect	Creates a new shape from the area where the selected shapes overlap, eliminating non-overlapping areas.	
Offset	Creates a set of parallel lines or curves to the right and left of the original shape.	



When you use the pencil, line, rectangle, or ellipse tool, try holding down the Shift key while you draw, to see how that constrains the drawing behavior.





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Adding your own shapes to stencils

If you want to reuse your own shapes the next time you open a particular drawing type, you can save them to existing stencils in your drawing, and then save the file as a template (.vst).

You can also create a new stencil, and then add your own shapes as well as any existing Visio shapes you want to it. Then, you can save the stencil in a template file, so that you and others can reuse it in other drawings.



To add your own shape to an existing stencil

- 1 Open the template containing the stencil you want to add your own shape to.
- 2 Click the icon on the stencil title bar (), and then choose Edit from the menu.
A red asterisk appears on the stencil icon () to indicate that the stencil is editable.
- 3 Hold down the Ctrl key, and then drag your own shape from the drawing page onto the stencil.
A new icon representing your own shape appears on the stencil with a generic name, such as Master.01.
- 4 Click the new master on the stencil, click it again, and then type the name you want for the new shape.

- 5 Click the stencil icon (), and then choose File > Save As to open the Save As dialog box. Navigate to the Solutions folder you want to save the stencil in, and then type a name for the stencil in the File Name box. For Save As Type, choose Stencil (*.vss), and then click Save to save your stencil.

When you open the stencil again, you can use the new shape as you do any other Visio 2000 master.

To add your own shape to a new stencil

- 1 Choose File > Stencil > New Stencil. You can also choose View > Toolbars > Stencil, and then click the New Stencil button on the Stencil toolbar.
The new stencil appears docked to the left side of the drawing window. The stencil icon has a red asterisk () to indicate that it is editable.
- 2 Hold down the Ctrl key, and then drag your own shapes, one at a time, from the drawing page onto the new stencil.
- 3 Click the Save icon () on the right side of the stencil title bar.
- 4 In the Save As dialog box, navigate to the folder where you want to save the stencil, and then type a name for the stencil in the File Name box. Check to make sure Save As Type is Stencil (*.vss), and then click Save.

Defining and editing styles

A style in Visio 2000 is a named collection of formatting attributes that you can apply to your shapes. You can create styles that format the elements of a shape: fill, line, and text. For example, you might create a style that gives shapes a black outline, a green fill, and black bold italic text.

When you define or edit styles in a drawing file, the changes you make are available only in the current drawing or diagram. To make a style available for future drawings, you can define or edit it in an existing template. The style is included in every new drawing you create.

To define a new style

- 1 Choose Format > Define Styles.
- 2 Type a name for the new style in the Style list.
- 3 If you want to base the new style on an existing style, select that style from the Based On list.
- 4 Under Includes, check the attributes that your style includes. A style can include formatting from any combination of the three attributes.
- 5 Under Change, click Text, Line, or Fill to change the settings for each attribute you included in Step 4.
- 6 When the style contains the settings you want, click Apply to add the new style and apply it to selected shapes.

To change a style

- 1 Choose Format > Define Styles.
- 2 In the Style list, select the style you want to change.
- 3 To rename the style, click the Rename button, type a new name in the Rename Style dialog box, and then click OK.
- 4 To change style settings, click the Change button. When you finish changing the attributes, do one of the following:
 - Click Apply.
 - Click Change to add the changes and continue working in the dialog box.

Creating your own template

You might want to create your own template when your drawings

- Require customized settings such as page size or scale, window size and position, or shape or text styles.
- Often include a particular background or set of layers. For example, if you place your company logo in every drawing, you can create a template with that background or set of layers in place.



To show or hide toolbars while you work, choose View > Toolbars, and then click to add or remove a check mark next to the toolbar you want to show or hide.

To create and save your own template

- 1 Open your drawing or start a new drawing based on the template you want to modify.
- 2 Open any additional stencils you want to save with the template by choosing File > Stencils > Open Stencil and then choosing the stencil(s) you want.
- 3 Change drawing page settings and styles to those you want to use in future drawings that are based on this template.
- 4 Choose File > Save As, and then do the following:
 - For Save As Type, select Template (*.vst).
 - For File Name, type a name for your template.
 - For Save, make sure Workspace is checked.
 - For Save In, select the folder in which you want to save the template.
- 5 Click Save.

Creating your own toolbars

You can create your own toolbars in Visio 2000, so you can work more efficiently, using only the tools you need as you create your drawings.

To create your own toolbar

- 1 Choose View > Toolbars > Customize.
- 2 On the Toolbars tab, click New, type a name for the new custom toolbar, and then click OK.
- 3 A new small toolbar appears.
- 4 Click the Commands tab, then from the Categories list, select the category that contains the command for which you want to create a button.
- 5 Drag the commands you want to include, one at a time, from the Commands list to the toolbar.

To attach a custom menu or toolbar to the drawing file so others can use it

- 1 Choose View > Toolbars > Customize, and then click Attach.
- 2 In the Custom Toolbars list, select a toolbar to include in the drawing file, and then click Copy.
- 3 When all of the toolbars you want in the drawing file are listed in the Toolbars In Document list, click OK.

