Getting Started with Visio

- In this tutorial, you will learn the basic functions to create a flowchart.
- There are many diagrams to choose from. Knowing the basic functioning of Visio will allow you to understand how to utilize other diagrams.

Step 1: Open Visio and choose a template. For this example, we will use the **BASIC FLOWCHART** template.

Choose Basic Flowchart
Step 2: Choose your **Flowchart** type. From the Basic Flowchart menu, you can choose **Basic Flowchart**, **Vertical Flowchart**, **Decision Branches Flowchart**, or **On-Page Reference Flowchart**. For this example, we will use **BASIC FLOWCHART**.
Step 3: Click the CREATE button.

Step 4: The different shapes symbolize various actions in your flowchart.
Step 5: To start your flowchart, click and drag the START/END shape to the page.

Step 6: For this example, we will create a flowchart on how to use Visio. Our Start/End shape will be titled “Visio.” To enter text, select the shape and begin typing. When you finish typing, click on a blank area of the drawing page or press ESC.
Step 7: To add another shape, hover over (or click on) the current shape. Four triangles will appear to allow you to choose the direction of the next shape. These triangles are the AUTOCONNECT ARROWS.
Step 8: Hover over the desired **AUTOCONNECT ARROW** and choose a shape from the shape **MINI TOOLBAR**. For this example, we will choose the **PROCESS** shape.

Step 9: Enter a name for the **PROCESS** shape but clicking on the shape and typing. For this example, we will use "**Open Visio**."
Step 10: Repeat steps 7 and 8 to add the next shape. The next shape we will add is a DECISION shape. The DECISION shape specifies a situation where the consequence of the decision determines the next step. For this example, we will name it “Choose Template.”

![Diagram of DECISION shape](image)

Step 11: Since we added a DECISION shape, this indicates a decision must be made in our process. For this example, we will have to decide which template to use. We will use PROCESS shapes to show the various Visio templates.

![Diagram of PROCESS shapes](image)
Step 12: To draw connecting lines to each decision, click the CONNECTOR tool.

Step 13: Beginning from the bottom of the DECISION shape, as it turns green, click and drag the CONNECTOR tool to the desired shape.
Step 14: Continue the process of adding shapes until you get to the end of your flowchart. For this example, we will continue from the **BASIC FLOWCHART PROCESS SHAPE**.
Useful Information

- The shape **On-page reference** indicates the next step (or previous step) is located on the flowchart. It takes the place of utilizing a long connector to jump from one shape to the next.

- The **Subprocess** shape is used to indicate steps that create a sub-process that is indicated either on the same page or another page of the document.

- The **Off-page reference** act as a hyperlink between pages or process and subprocesses. The link will allow you to jump from the **Off-page reference** shape to another shape either on the same page or on another page of the flowchart.

- The **Document** shape indicates a step that creates a document.

- The **Data** shape indicates information that may be coming in or out of the process.

Finish: By following these steps, you create a basic flowchart using Visio.