# Working with Microsoft Visio at UCT

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# Standards for documenting process flows at UCT using Visio

## Chart layout

* When using a vertical *Cross-Functional Flowchart* layout ensure that you use:
* a bar at the top to label the different functional areas.
* a vertical dotted line between functional areas.
* Use a portrait page orientation with a top-down flow.
* Background must be white .
* Process must fit onto one page, if possible, or be split into two or more pages using [*Off-page reference*](#_What’s_in_the)shapes.

## Topic titles

Only use one of the following formats:

* (The) <Name of Business Process> Process; e.g. The housing application process;
* (The) Process of <Name of Business Process>; e.g. The process of housing applications.

## Shapes

* In order to maintain consistency, it is recommended that you only use those shapes in the stencil provided by the UCT Visio template. See: [What’s in the UCT Visio template?](#_What’s_in_the) for the default stencil shapes.
* The following shape standards are applied by using the template: Shape outline line pattern 1, Weight 1, Colour Black.
* A shadow may be added using the standard: Shadow colour Gray (15), pattern solid (1). Shadows should be used consistently.

### Colour

* Colour is desirable in the online environment and will be applied in consultation with you when the process flow is published on the web.
* UCT corporate colours should be used if possible i.e. shades of navy blue and grey.
* Colour may be used to indicate different types of activity or different business areas.

## Connectors

The following connector formats default when you use the UCT Visio template:

* Line style: Black, Pattern 1, Weight 1, Style 4, Size medium.
* Connector lines coming out of decisions should be labelled Yes and No. There is a line stencil on the template to default a Yes or No label coming out of a shape.

Note that:

* Corner rounding is not used.
* You should never have connecting lines crossing each other.

## Fonts

The following font for shape text defaults in Visio and is used as the UCT standard:

Text in shapes:

* Arial 8 black.
* Yes and No labels on connector lines should also use this default.

Titles:

* Process title: Arial 14 bold black. Sentence case.
* Function area title: Arial 12 bold black. Sentence case.

Hyperlinks:

* In shapes that link to other topics, the appropriate part of the text is underlined and formatted Blue (Colour 4).

# Using the UCT template for Microsoft Visio 2007, 2010 and 2013

## Background

The Visio 2010 or Visio 2013 installation CDs may be requested or procured from ICTS Acquisitions.

## Opening and saving the Microsoft Visio template files

The template files are available on the ICTS web site.

1. In Internet Explorer go to [www.icts.uct.ac.za](http://www.icts.uct.ac.za) and choose *Technical Writing* → *Templates and tools.*
2. The *ICTS – Templates and tools* web page opens.

* In the *Templates* section click *UCT Template for Microsoft Visio*.

1. The *ICTS – Using the UCT Template for Microsoft Visio* web page opens.

* Open and save the Microsoft Visio template files for the version you are using:
* [Opening and saving Microsoft Visio 2013 and 2010 template files](#_Opening_and_saving)
* [Opening and saving Microsoft Visio 2003 and 2007 template files](#_Opening_and_saving_2)

### Opening and saving Microsoft Visio 2013 and 2010 template files

1. In the *ICTS – Using the UCT Template for Microsoft Visio* web page.

* Right-click *UCT* *STENCIL.VSS*, and choose *Save Target As...*

1. The *Save As* dialog box appears.

* In the *Save in* field, browse to: C:\Users\<user name>\Documents\My Shapes

NOTE

Saving the template in this folder lets Visio find the template when you start a new drawing.

* Click *Save.*

1. Repeat steps 4 and 5 to save the following files:

* Either UCT\_TEMPLATE\_2013.VSTX, if you are using Visio 2013
* Or UCT\_TEMPLATE\_2010.VST, if you are using Visio 2010
* And UCT Basic Flowchart Shapes\_2010.vss, , if you are using Visio 2010
* And UCTshortcuts.exportedUI

1. The template files are now saved on your computer and are ready for use.

### Opening and saving Microsoft Visio 2003 and 2007 template files

1. In the *ICTS – Using the UCT Template for Microsoft Visio* web page.

* Right-click *UCT* *STENCIL.VSS*, and choose *Save Target As...*

1. The *Save As* dialog box appears.

* In the *Save in* field, browse to C:\Documents and Settings\<YOUR PROFILE NAME >\my documents\my shapes

NOTE

Saving the template in this folder lets Visio find the template when you start a new drawing.

* Click *Save.*

1. Repeat steps 4 and 5 to save the following files:

* UCT\_TEMPLATE\_2003.VST
* CROSS-FUNCTIONAL FLOWCHART SHAPES VERTICAL.VSS

1. The template files are now saved on your computer and are ready for use.

## Starting a new drawing based on the template in Visio 2013 and 2010

* [Changing the default template folder](#_Changing_the_default)
* [Installing the UCT shortcuts menu](#_Installing_the_UCT)
* [Starting a new drawing based on the template](#_Starting_a_new)

### Changing the default template folder

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You only need to do this once.

1. In Visio:

* Either choose File → Options → *Advanced*.
* Or choose *Open Other Drawings* → Options → *Advanced*.

1. The *Advanced options for working with Visio* pane appears.

* In the *General* section, click *File Locations…*.

1. The *File Locations* dialog box appears.

* In the *Templates* field, click  .

1. The *Choose Folder* dialog box appears.

* Navigate to C:\Documents and Settings\<YOUR PROFILE NAME >\my documents\my shapes
* Click *Select.*

1. Click *OK.*

### Installing the UCT shortcuts menu

1. In Visio, choose File → Options → *Customize Ribbon*.
2. The Visio Options dialog box appears.

* Choose the *Customize Ribbon* tab.

1. The *Customise the Ribbon* pane appears.

* In the *Customise the Ribbon* section, click *Import/Export…* and choose *Import customization file*.

1. The *File Open* dialog box appears.

* Navigate to *My Shapes* and select *UCTshortcuts.exportedUI*.
* Click *Open*.

1. A *Microsoft Office* dialog box appears asking if you want to replace existing customisations.

* Click *Yes.*

1. The *Visio Options dialog box reappears.*

*–* Click *OK.*

1. The UCT shortcuts menu has been installed for the Visio 2010 or 2013 template, as applicable.

### Starting a new drawing based on the template in Visio 2013

1. In Visio, choose File → New*.*
2. The *New* menu *page* appears with two main sections *FEATURED* and *CATEGORIES*.

* The *FEATURED* section displays by default.

|  |  |
| --- | --- |
| If you have… | then… |
| never used the template before | * Select *CATEGORIES* section. In the *Other Ways to Get Started* section, click New from existing.  1. The CATEGORIES section displays.  * If you [changed the default template folder](#_Changing_the_default) then, the Visio templates and folders in the *My Shapes* folder are displayed. * Select the *UCT\_template\_2013.vstx*.  1. The *UCT\_template\_2013* dialog box appears  * Click  *Create*.  1. A new drawing opens based on the selected template. |
| recently used the template | * In the FEATURED section, select UCT\_template\_2013.  1. The *UCT\_template\_2013* dialog box appears  * Click  *Create*. * A new drawing opens based on the selected template. |

### Starting a new drawing based on the template in Visio 2010

1. In Visio, choose File → New*.*
2. The *Choose a Template menu page* appears.

|  |  |
| --- | --- |
| If you have… | then… |
| never used the template before | * In the *Other Ways to Get Started* section, click New from existing.  1. The *New from Existing Drawing* dialog box appears.  * Navigate to the *My Shapes* folder. * Select the *UCT\_template\_2010.vst*. * Click *Create New*.  1. A new drawing opens based on the selected template. |
| recently used the template | * In the *Recently Used Templates* section, select *UCT\_template\_2010*. * Click  *Create*.  1. A new drawing opens based on the selected template. |

## Starting a new drawing based on the template in Visio 2007

1. In Visio choose File → New → *New Drawing from Template.*
2. The *New Drawing from Template* dialog box appears.

* Navigate to C:\Documents and Settings\<YOUR PROFILE NAME >\my documents\my shapes and choose UCT\_template\_2003.
* Click Open.

1. A new drawing opens based on the selected template.

# What’s in the UCT Visio template?

* [UCT Stencil 2010 and 2013](#_UCT_Stencil_2010)
* [UCT extra buttons toolbar for Visio 2010](#_UCT_extra_buttons_1)
* [UCT Stencil 2007](#_UCT_Stencil_2007)
* [UCT extra buttons toolbar for Visio 2007](#_UCT_extra_buttons)

## UCT extra buttons toolbar for Visio 2010 and 2013

| Button | Name | Used for… |
| --- | --- | --- |
|  | Zoom | Opening a dialog box allowing you to zoom in or out by selecting one of many options or defining your percentage and clicking *OK*. |
|  | Fit to Window | Opening a window that allows you to view sections of the flowchart. Especially useful for flowcharts that are zoomed out to 100% or greater. |
|  | Whole Page | Opening a window that displays size and position information for any selected flowchart object e.g. shape, connector, text box. |
|  | Zoom In | Zooming in by 25% per click |
|  | Zoom Out | Zooming out by 25% per click |
|  | Edit text | Making text in selected shape or text box available for editing. |
|  | Rotate text | Rotating selected text by 90 degrees to the right per click. |
|  | Spelling | Performing a spell check on the document. |
|  | Align shapes | Opening the *Align Shapes* dialog box to align selected shapes (up/down and/or left/right). |
|  | Add hyperlink | Opening the *Hyperlink* dialog box to add a hyperlink to any selected flowchart object (e.g. shape, connector or text box).  **Note:** Enter the appropriate full URL in the *Address* field, e.g. <http://www.uct.ac.za>. |
|  | Shadow Color | Applying the shadow colour, style and offset to the selected shape.  UCT standards for shadows are:   * Colour: Grey (15) * Pattern: Solid (1) |
|  | Shadow Color | Opening a drop-down list displaying a range colours and various options for applying shadows to shapes. |
|  | Rotate | Rotating the selected object (shape or connector) to the left or right by 90 degrees or flipping it vertical or horizontal. |
|  | Connect Shapes | Automatically connecting shapes in order of shape selection. |
|  | Pointer Tool | Selecting, moving and resizing objects. |

## UCT Stencil 2010 and 2013

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* The UCT Stencil 2010 contains all the items in the UCT Stencil 2007, as well as the Swimlane shown in the table below.
* The *Functional band* does not work effectively in Visio 2010, use the *Swimlane* instead.

|  |  |
| --- | --- |
| Icon | Used for… |
|  | **Swimlane (vertical)**: Used to create a cross-functional flowchart with vertical bands. Use swimlanes to organize a process according to the responsibilities of different functional areas. |
|  | **Separator (vertical):** Used to create a horizontal separator between phases within a vertical cross-functional flowchart. |
|  | **Swimlane (horizontal):** Used to create a cross-functional flowchart with horizontal bands. Use swimlanes to organize a process according to the responsibilities of different functional areas. |
|  | **Separator (horizontal):** Used to create a vertical separator between phases within a horizontal cross-functional flowchart. |

## UCT Stencil 2007

|  |  |
| --- | --- |
| Icon | Used for... |
| process | **Process**: All procedures that are done (mostly) online in an administrative computer system e.g. SAP, PeopleSoft. |
| document | **Document**: A paper document that is produced as a result of an action or which is forwarded to another person/department as an action in the process. |
| decision | **Decision**: A question that is asked at a particular point in a process. There must be 2 exits (and no more) from a question i.e. Yes or No. Questions must be phrased to facilitate a Yes or No answer. |
| manual operation | **Manual operation**: All actions that are carried out (mostly) manually i.e. on paper, via email or verbally. |
| predefinedprocess | **Predefined process**: High-level summary of a process i.e. the block can be expanded to see a detailed process. |
| casedecision | **Case decision**: An assessment that is made at a particular point in a process, involving the evaluation of a case where there may be multiple exits. |
| terminator | **Terminator**: Used to indicate where a process can be exited before its logical end point, usually due to a condition that exists or as a result of a question that is asked. |
| onpageref | **On-page reference**: Used (sparingly) to jump into another part of the same or a different process. |
| offpageref | **Off-page reference**: Used to indicate continuity, this block names the process that is jumped to, or that which has been jumped from. |
| functionalband | **Functional band**: Used to create a cross-functional flowchart with vertical bands. Use functional bands to organize steps in a process according to the responsibilities of different functional areas. |
| noresult | **No result**: Connector with 'No' text box to be used with decision shape. |
| yesresult | **Yes result**: Connector with 'Yes' text box to be used with decision shape. |

## UCT extra buttons toolbar for Visio 2007

|  |  |  |
| --- | --- | --- |
| Button | Name | Used for… |
| zoomout | Zoom out | Zooming out by 25% per click |
| zoomin | Zoom in | Zooming in by 25% per click |
| pandandzoomwindow | Pan and zoom window | Opening a window that allows you to view sections of the flowchart. Especially useful for flowcharts that are zoomed out to 100% or greater. |
| sizeandpositionwindow | Size and position window | Opening a window that displays size and position information for any selected flowchart object e.g. shape, connector, text box. |
| addhyperlink | Add hyperlink | Adding a hyperlink to any selected flowchart object (e.g. shape, connector or text box). Enter the appropriate full URL in the address field, e.g. http://www.uct.ac.za |
| shadow | Add shadow | Adding a shadow to selected flowchart object. UCT standards for shadows are:  Colour: Grey (15) Pattern: Solid (1) |
| rotateleft | Rotate left | Rotating selected flowchart object (shape or connector) to the left by 90 degrees per click. |
| rotateright | Rotate right | Rotating selected flowchart object (shape or connector) to the right by 90 degrees per click. |
| rotatetext | Rotate text | Rotating selected text by 90 degrees per click. |
| edittext | Edit text | Making text in selected shape or text box available for editing. |
| alignshapes | Align shapes | Alignment of selected shapes (up/down and/or left/right). |
| distributeshapes | Distribute shapes | Distribution of selected shapes (up/down or left/right). |
| connectshapes | Connect shapes | Automatically connecting shapes in order of shape selection. |

# Visio 2007, 2010 and 2013 tips and tricks

* [Keyboard shortcuts, menu paths and buttons not on the toolbar](#_Keyboard_shortcuts,_menu)
* [Shape features](#_Shape_features)

## Keyboard shortcuts, menu paths and buttons not on the toolbar

|  |  |
| --- | --- |
| **Function** | **When to use** |
| CTRL + D | Duplicate an object |
| CTRL + A | Select all objects on the diagram |
| Shift + Click | Select more than one object |
| Arrow keys | Move shapes a small amount at a time |
| CTRL + 1  *Pointer Tool* | After using one of the other tools (e.g. *Text Tool* or *Connector Tool*), click  *Pointer Tool* or pressCTRL + 1 to reinstate normal mouse pointer functionality |
| CTRL + 2  *Text Tool* | Create a text box or edit text in an object on the drawing |
| CTRL + 3  *Connector Tool* | Connect shapes (use as an alternative to the  *Connect Shapes* button on the *UCT Extra buttons* toolbar) |
| *Tools → Add-Ons → Visio Extras → Number Shapes* | Shape numbering |

## Shape features

|  |  |
| --- | --- |
| **Feature** | **When to use** |
| Drag shapes | Drag shapes from the UCT stencil onto the drawing page, and to a different position on the drawing page |
| Group select | Drag around the shapes you wish to select to enable you to perform an operation on more than one shape at one time |
| Green drag handles | Drag the green handles to resize shapes |
| Blue connection points | Attach connectors to the blue “X” connection points. This ensures that when you move a shape, any connector that is correctly joined will move with that that shape |