

## Visio Tutorial

Microsoft Visio is useful for drawing influence diagrams because it is compatible with Word and PowerPoint. You can copy and paste Visio diagrams into both Word and PowerPoint. If you double click on a Visio-pasted diagram within Word, you can edit the figure directly. Visio is far more nuanced than the drawing tools that come with Word.

There are older versions of Visio; the newer versions are backward compatible. The older versions are not necessarily forward compatible. There are few differences between the older and newer versions that matter for purposes of drawing influence diagrams. As described below, we provide some template and menu files for use within Visio that you may find useful. We created them on an older version. Microsoft blocks older files for use in Visio through its Trust Center settings. To use our files, you may need to enter the Trust Center and remove the blocks. See the Appendix at the end of this document for how to do so.

Visio is fairly intuitive. To the left of the screen is a menu of drawing tools. You click on a tool item and then drag it to a spot on the gridlined “paper” to the right where you want to place that item. For example, you might click on the Box item on the menu and then drag it to where you want the box. You can resize the item (we will call it an “object”) by clicking on it and then dragging the corners of it, much like you would resize a text box or a graphic in Word.

The default menu of items/objects on the left of the Visio screen has few of the objects needed for drawing influence diagrams. We created a menu specifically for influence diagrams and it is in a file with the tag .vss and is called PathDiagramMenu.vss. You can download this from our website. Once you have opened Visio, you can load the customized menu items by clicking File > Open > Browse and browsing to the file and opening it. The customized menu will then appear to the left of your screen. Actually, you will rarely need the menu because you can just copy and paste objects from the various templates we provide (see below); but we provide it to you just in case.

Your screen should now look like Figure 1.1.

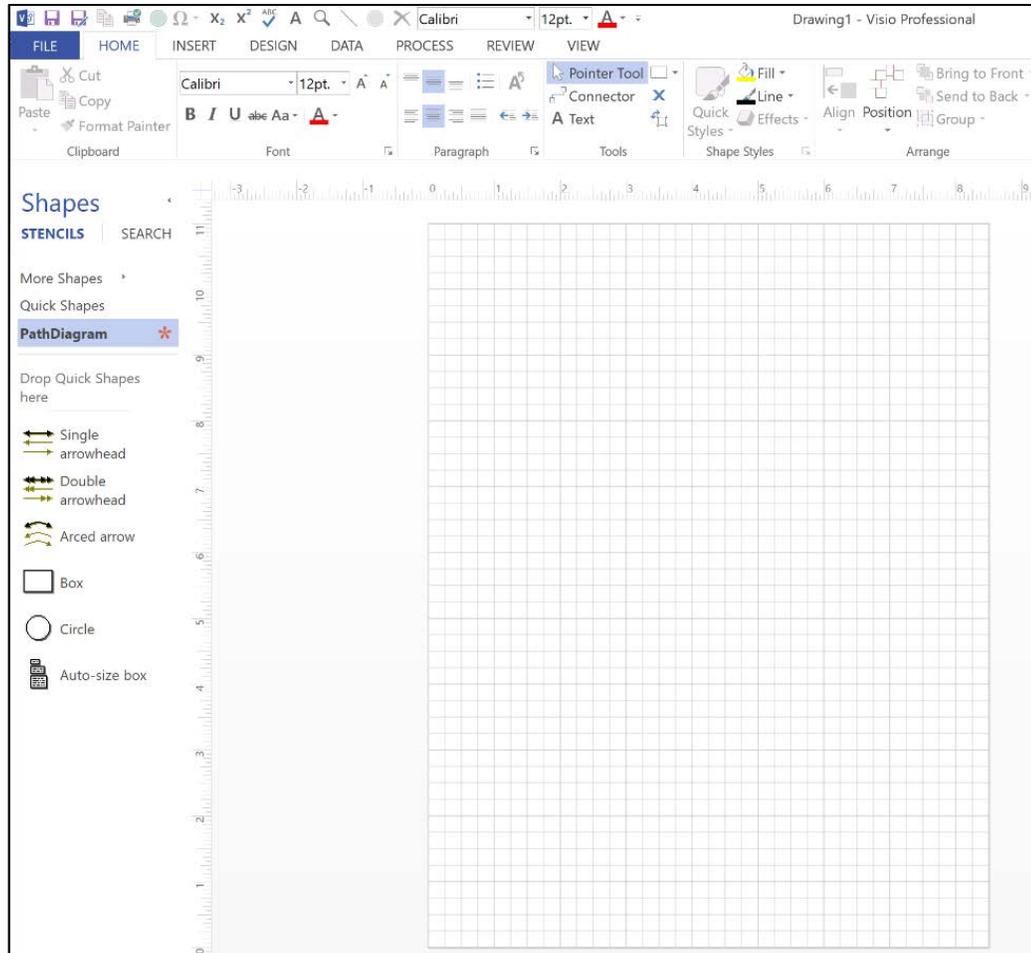
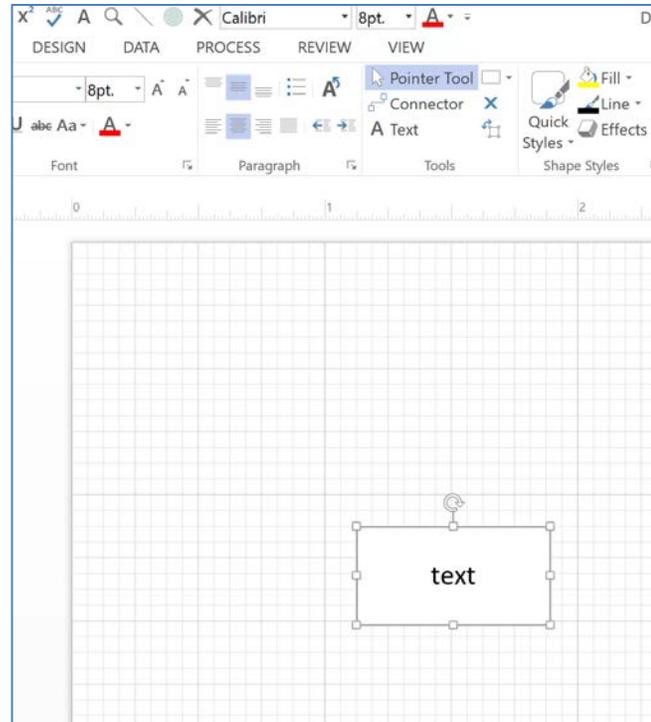


FIGURE 1.1 Example Visio Interface

The pointer tool (highlighted in Figure 1.1 at the top) on the Home tab is what you use to move around the menu and the page; you also use it to select and act on objects. You also can click on a drawn box, a circle, or an arrow with it and then copy the selected item to the clipboard for pasting by pressing the usual Ctrl-C sequence in Windows for copying items to the clipboard. You can select multiple items for copying using Ctr-Click, as is traditional in all Microsoft programs. Ctr-A selects everything. Ctr-V executes a paste command, again, as is standard in Microsoft programs.

To place or change text inside an object, double click on the object. The text inside the object will highlight and you can add the text you want using any font and text size, like this:



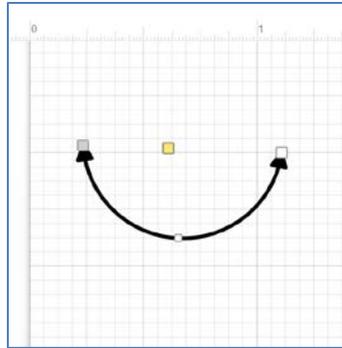
If you want to rotate the box, you can do so by clicking on the curved arrow above it, drag the arrow upward, and then dragging it to the left or right – you will see the textbox rotate.

In the menu on the top (see Figure 1.1), there is an option called “A Text.” Click on it and then position the cursor on the diagram where you want to add text and drag the cursor to create a text box. Then enter the text you want. You can set the font and size of the text using the options in the top menu, as is standard in Word. You can rotate the text using the principles described above for rotating a box.

If you right click on any object, a set of options for editing that object will appear on the right side of the screen. They are self-explanatory.

To copy an entire diagram to the clipboard, click on the Copy item on the top menu (see Figure 1.1). If a specific object is selected within the diagram, it will just copy that object to the clipboard. If nothing is selected, the full diagram will be copied to the clipboard.

For double headed arrows, you can change the arc by clicking on the white dot on the arc and dragging it:



## THE TEMPLATES

We provide three templates that you can open and then edit and copy and paste objects on it to create path diagrams you want. Figure 1.2 presents the template we used to create all of the diagrams in document for how to draw influence diagrams for articles.

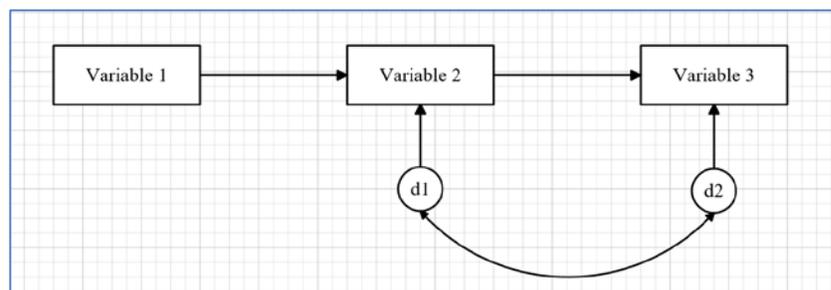


FIGURE 1.2 Example Template

Note that we can select a box, an arrow, a circle or a curved arrow and then copy and paste a new one onto the diagram. We can select and move objects, enter new text, resize objects, or change fonts and text sizes. We can delete any object. All of the key elements are present. Figure 1.3 presents the template for a full SEM model. Again, with strategic editing and copying and pasting. Most any diagram can be created.

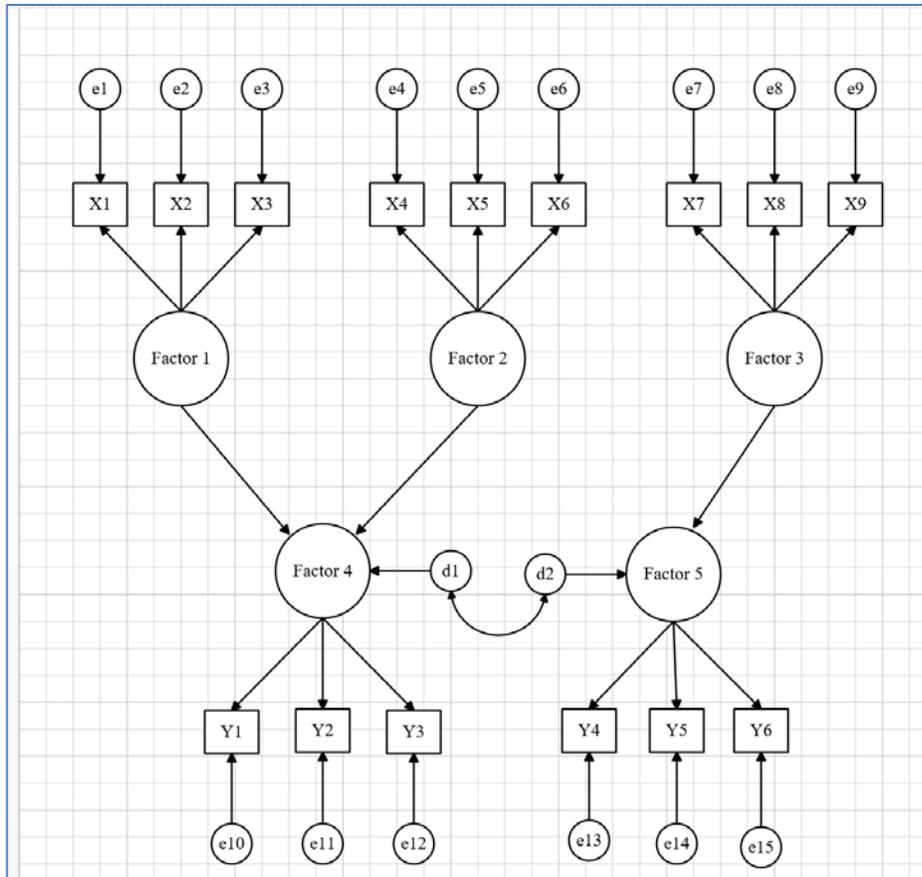
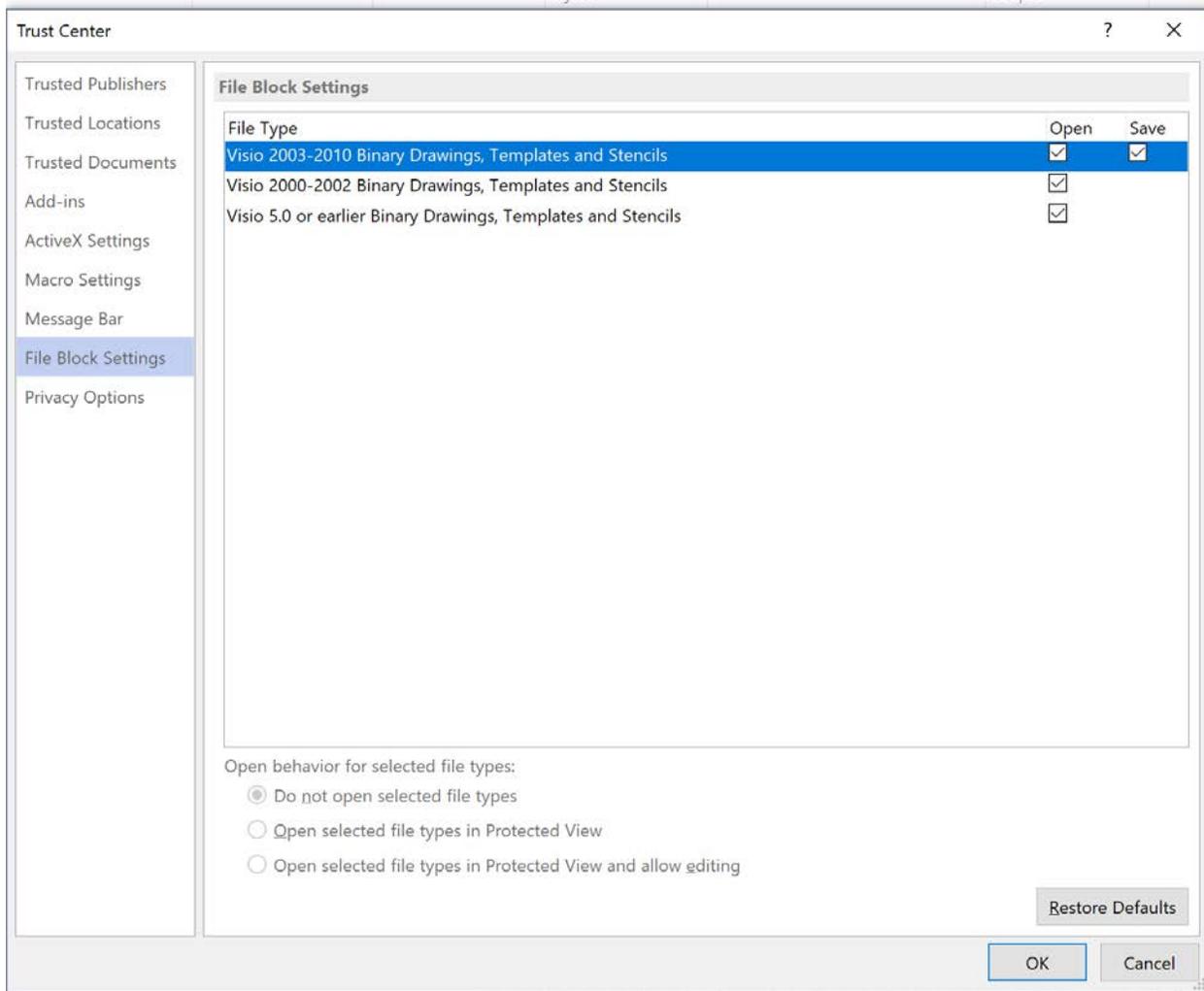


FIGURE 1.3 Full SEM Template

## APPENDIX: CHANGING THE TRUST SETTINGS

Open Visio and click on File > Options > Trust Center. In some versions of Visio you will also need to click on “Trust Center Settings.” To the left, click on the option “File Block Settings.” The Screen will look something like this:



Uncheck all the boxes with the checks. Then click OK. This is completely safe for your computer. It just allows Visio to open older files.