

CHAPTER 2

WORKING WITH STENCILS

InFocus

WPL_V502

Microsoft Visio is based on **stencils**. Stencils are palettes of shapes that can be used to create almost any diagram you need. Each palette is task-specific making it easier to locate the shape/s you require. You can open and work with multiple stencils and can even create your own.

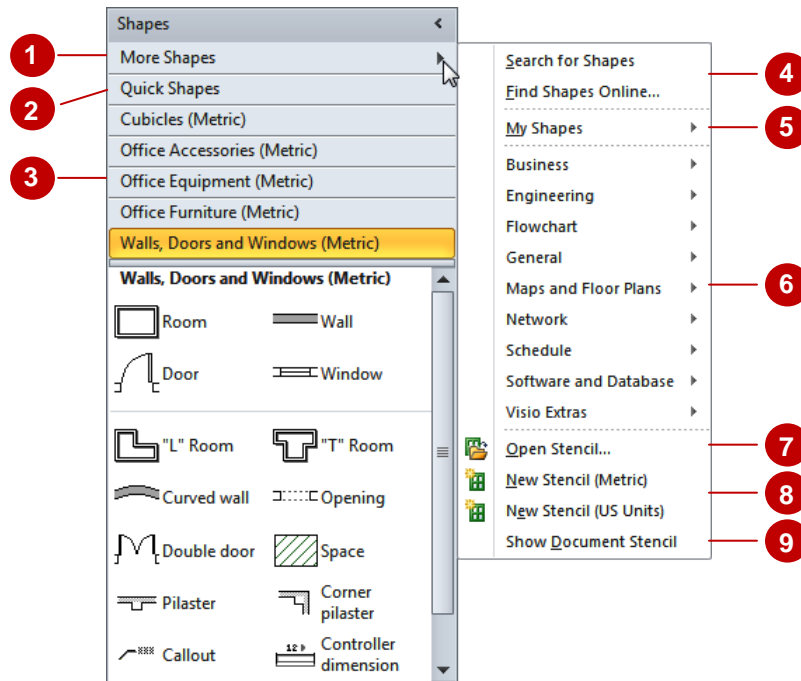
In this session you will:

- ✓ gain an understanding of the **Shapes** window
- ✓ gain an understanding of **Quick Shapes**
- ✓ learn how to create a custom stencil
- ✓ learn how to open **Visio** and custom stencils
- ✓ learn how to edit a stencil
- ✓ learn how to close unwanted stencils.

THE SHAPES WINDOW

When you create a new diagram based on a specific template, all stencils associated with this template will open automatically in the **Shapes window**. The **Quick Shapes** stencil will also

open regardless of the template you used. From the **More Shapes** menu in the **Shapes** window, you can open and close other stencils (both built-in and custom), and create and edit custom stencils.



- 1 The **More Shapes** menu provides access to options for finding shapes, opening Visio and custom stencils and creating stencils.
- 2 The **Quick Shapes** stencil is always available in the **Shapes** window. See *Quick Shapes* later in this chapter for more information.
- 3 The title bars of all stencils that are open are listed near the top of the **Shapes** window. Right-clicking on a title bar lets you close a stencil, reset a stencil if you have moved any of its shapes into the **Quick Shape** area of the stencil, or save a Visio stencil as a fully editable custom stencil.

The stencil whose shapes currently appear in the **Shapes** window is highlighted in orange. To display the shapes in a stencil, click on its title bar. You can re-order the shapes in a palette by dragging them – for instance, you might place shapes you use most often near the top of the palette.

- 4 If you can't find the shape you desire, you can search for it on your computer or online.
- 5 You can open your **Favourites** stencil, which is stored in your **My Shapes** folder, and then drag shapes from the drawing and drop them in the **Favourites** stencil. After saving the stencil, you can then quickly access these shapes whenever you need them.
- 6 All Visio stencils are categorised according to the type of diagram they are used to create. To open a stencil, select it from the appropriate submenu.
- 7 If you have created your own custom stencils, you must use the **Open Stencil** dialog box to open them in the **Shapes** window.
- 8 You can create custom stencils that are fully editable. You can choose to create stencils which use either metric or imperial measurement.
- 9 All shapes that you use to create a drawing are automatically added to the **Document Stencil**. You can show this stencil in the **Shapes** window, making it easier for you to access the shapes you've already used. This

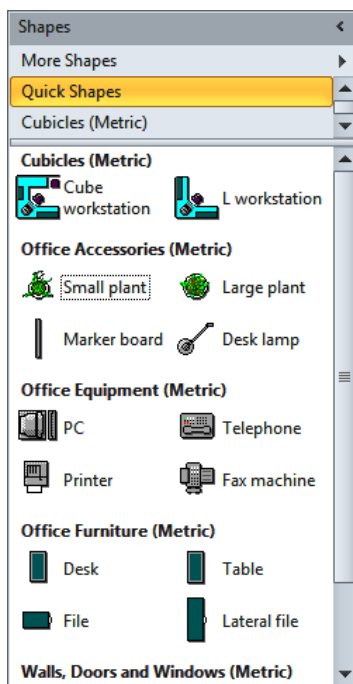
QUICK SHAPES

You can rearrange the shapes in stencils by dragging and dropping them as desired. With this in mind and because it's easiest to find shapes near the top of a palette, Visio has made a **Quick**

Shapes area at the top of each stencil. Shapes that are in this area are also included in the **Quick Shapes** stencil and in the mini toolbar that can appear for a shape with **AutoConnect** capability.

Quick Shapes Area In Stencils

A thin grey divider separates the top few shapes from the others in every stencil. The shapes above this line are the **Quick Shapes** for the stencil. There are typically two to six shapes in this area but you can add and remove shapes by dragging them in and out of the section. Notice in our sample to the right, Visio has only two shapes in the **Quick Shapes** area of the **Cubicles** stencil – **Cube workstation** and **L workstation**.

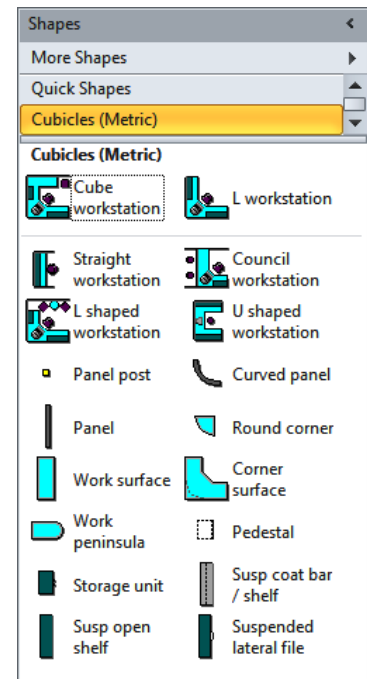


Quick Shapes Stencil

The **Quick Shapes** stencil is always located near the top of the **Shapes** window. This stencil is a dynamically generated collection of the **Quick Shapes** for the stencils that are currently open in the **Shapes** window.

If there is more than one stencil open for the diagram, the **Quick Shapes** are separated by the names of the stencils to which they belong. For instance, there are five stencils open in our sample to the left.

If you usually use only a few shapes from each stencil in a diagram type, drag those shapes into the **Quick Shapes** area of each stencil. You can then open the **Quick Shapes** stencil and not have to switch between stencils while you work.



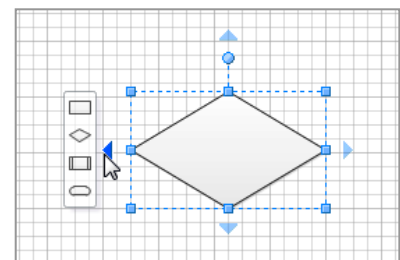
Quick Shapes In AutoConnect

If you have positioned a shape on the drawing that has **AutoConnect** capability, you can hover over it until blue AutoConnect arrows appear around the shape. You can then hover over the arrow in the direction where you want to add a shape and a mini toolbar containing up to four **Quick Shapes** will appear (see the sample to the right).

As you move the pointer over the four shapes in the toolbar, a preview of the shape will appear on the page. You can then click on the shape you desire.

If you want different shapes to appear in the mini toolbar, move them so that they appear at the top of the **Quick Shapes** area in their stencil. You cannot change the order of the shapes in the **Quick Shapes** stencil.

If you have more than one stencil open, you can change which **Quick Shapes** will appear on the mini toolbar. To do this, drag the stencil with the desired shapes and drop it just below the **Quick Shapes** title bar.



CREATING A CUSTOM STENCIL

As you become more familiar with Visio and working with stencils, you'll soon realise that it's much more efficient to work with a single stencil that contains all relevant shapes for your

drawing. It is very easy to create your own custom stencils, dragging the required shapes from the various Visio stencils.

Try This Yourself:

Before starting this exercise ensure Visio has started...

- 1 Create a new drawing based on the **Office Layout** template in the **Maps and Floor Plans** category


Five templates will open automatically....


- 2 Click on **More Shapes** at the top of the **Shapes** window and select **New Stencil (Metric)**

A new empty stencil will be added to the window. The red asterisk * indicates that this stencil is editable...

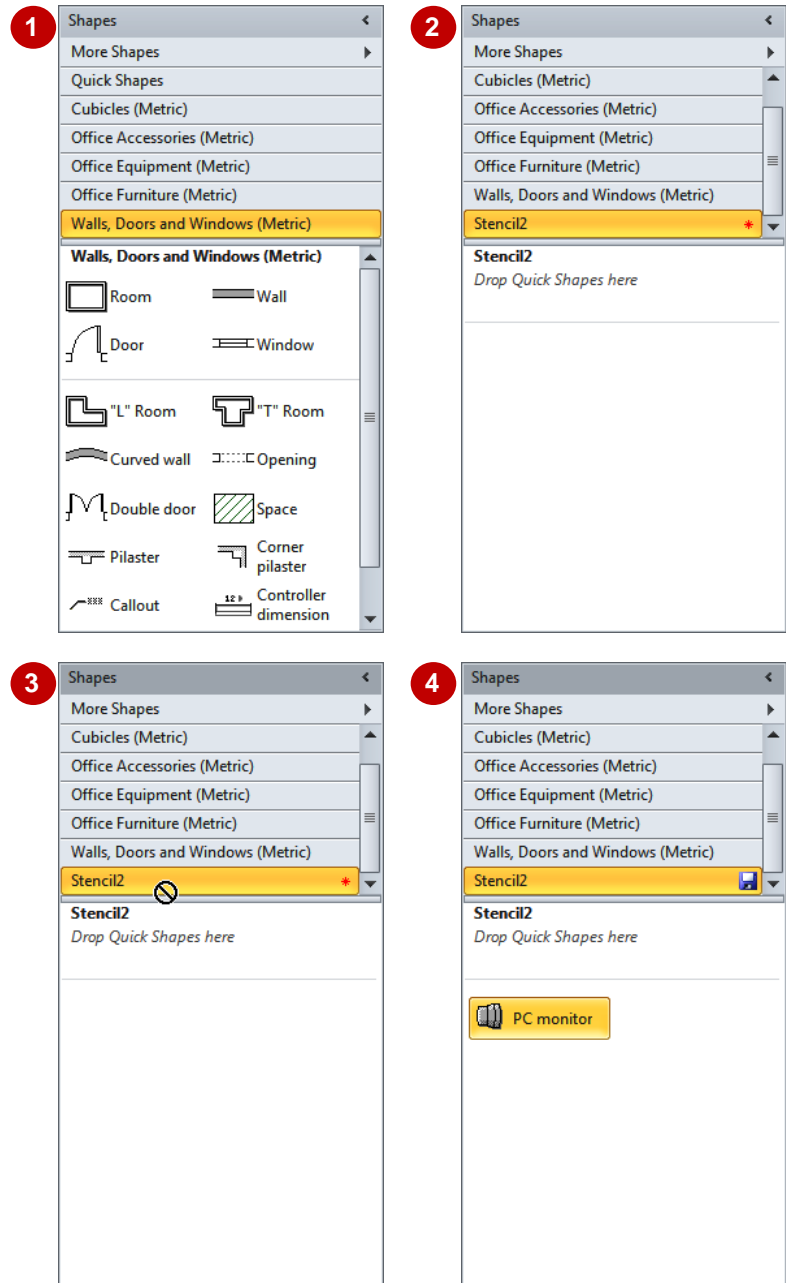
- 3 Click on **Office Equipment** to open the stencil, then click on and drag the **PC monitor** shape onto the new stencil until it opens

- 4 Drop the shape in the new stencil

A save icon  will replace the red asterisk indicating that the stencil has been edited and needs to be saved...


- 5 Click on the save icon  to open the **Save As** dialog box, then navigate to the course files folder

- 6 Type **My Stencil** in **File name** and click on **[Save]**



For Your Reference...

To create a custom stencil:

1. Create a drawing based on a template, then click on **More Shapes** and select **New Stencil**
2. Drag the shapes from the desired stencils and drop them in the new stencil
3. Click on the save icon 

Handy to Know...

- You can also create a new custom stencil from a blank drawing. In this case, you will need to open the templates as desired from the **More Shapes** menu.
- You can create a custom stencil from a Visio stencil. Right-click on the Visio stencil, select **Save As** and then edit the stencil as desired.

OPENING A STENCIL

When you create a new drawing based on a particular template, specific stencils will open in the **Shapes** window by default. But, you are not limited to using only these stencils for your

drawing. You can open other stencils – either Visio or custom stencils – using the **More Shapes** menu in the **Shapes** window.

Try This Yourself:

Continue using the previous file with this exercise...

1 Click on the **File** tab, then click on **Close** to close any open drawings (clicking on **[Don't Save]** when prompted)

2 Click on the **File** tab, click on **Blank drawing** under **Other Ways to Get Started** and click on **[Create]**

No stencils will be open. Let's open a custom stencil...

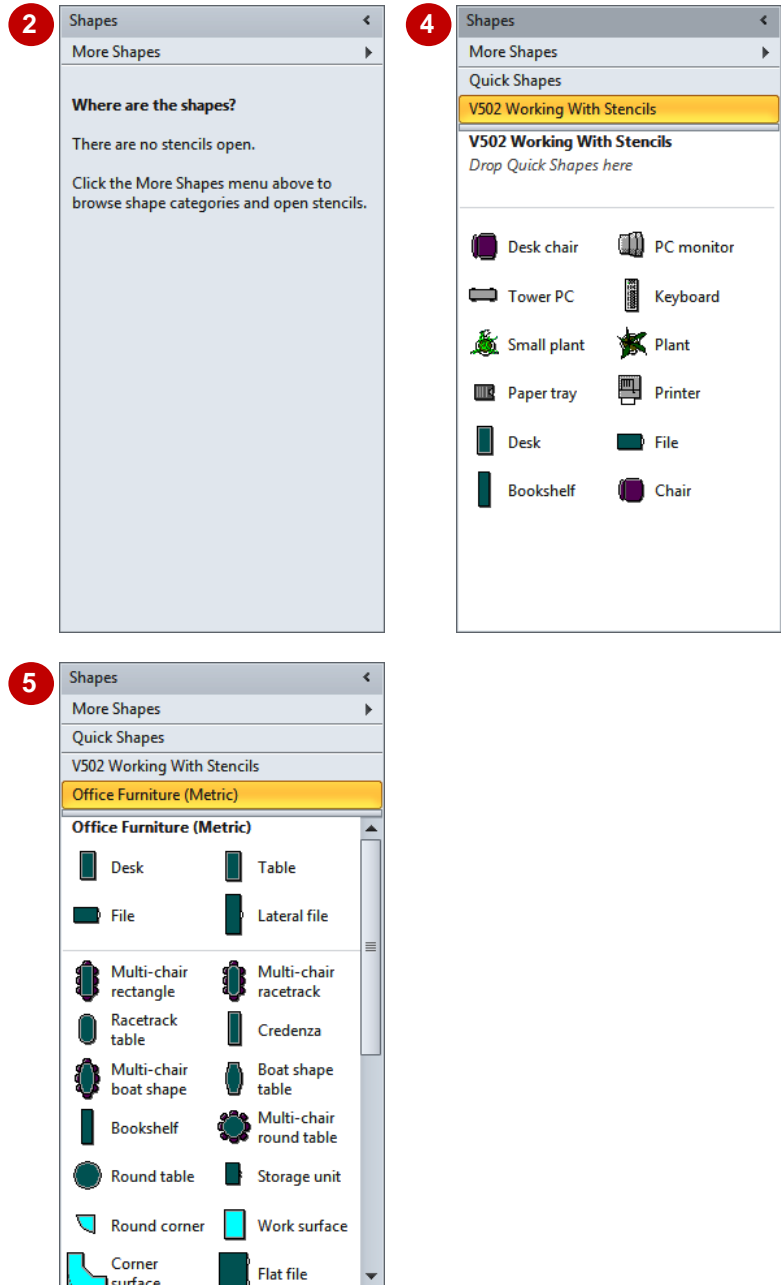
3 Click on **More Shapes** at the top of the **Shapes** window and select **Open Stencil** to open the **Open Stencil** dialog box

4 Navigate to the course files folder, then double-click on **V502 Working With Stencils.vss**

This custom stencil will open in the Shapes window. Let's open a Visio stencil now...

5 Click on **More Shapes**, then select **Maps and Floor Plans > Building Plan > Office Furniture (Metric)**

This Visio stencil will open in the Shapes window



For Your Reference...

To open a stencil:

1. Click on **More Shapes**
2. Select **Open Stencil** to locate and open a custom stencil
or
Select **Template Category > Template** to open a Visio stencil

Handy to Know...

- Once you have opened a stencil, you can select multiple shapes for placing onto a page or into a custom stencil by clicking on the first shape, pressing **[Ctrl]** and clicking on the additional shapes.


EDITING A STENCIL

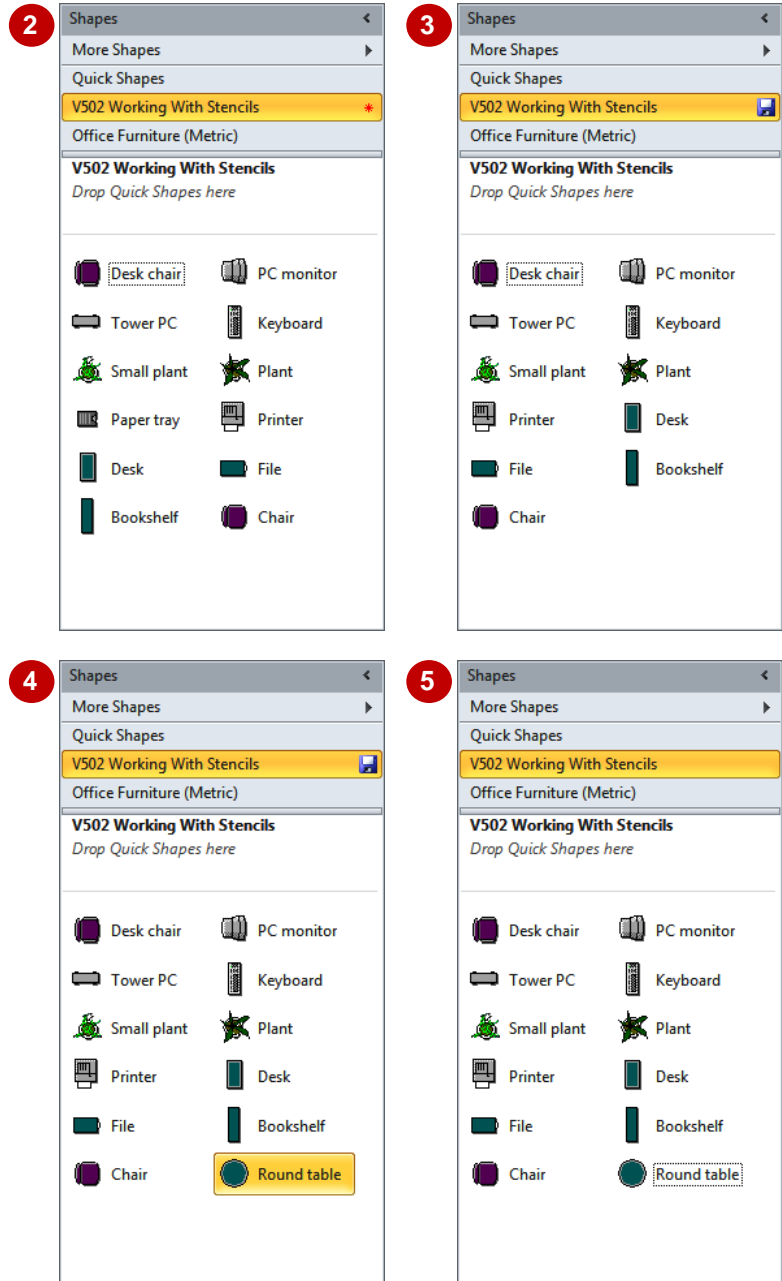
Although you cannot edit Visio default stencils, you can edit custom stencils as necessary. But before you can either add or remove shapes from a custom stencil, you must first place the stencil

in edit mode. After making the desired changes and saving them, you must remember to exit edit mode so you don't accidentally delete shapes from your stencil.

Try This Yourself:


Continue using the previous file with this exercise...

- 1 Click on **V502 Working With Stencils** to see the shapes in this stencil
- 2 Right-click on **V502 Working With Stencils** and select **Edit Stencil**
A red asterisk will appear in the title bar indicating that the stencil is in edit mode...
- 3 Click on the **Paper tray** shape and press **Del** to delete the shape
Notice that the save icon has now appeared...
- 4 Click on the **Office Furniture** stencil to open it, then drag the **Round table** shape up to the **V502 Working With Stencils** title bar and drop it in the custom stencil when it opens
Now you must save the changes and exit edit mode...
- 5 Click on the save icon , then right-click on **V502 Working With Stencils** and select **Edit Stencil**
The red asterisk will disappear from the title bar indicating that the stencil is no longer in edit mode



For Your Reference...

To edit a custom stencil:

1. Right-click on the stencil's title bar and select **Edit Stencil**
2. Make the desired changes and click on the save icon 
3. Right-click on the stencil's title bar and select **Edit Stencil** to turn off edit mode

Handy to Know...

- You cannot edit Visio default stencils – that is, you cannot remove or add shapes. But, you can relocate the shapes in the stencil by dragging them to a new location, such as into the **Quick Shapes** area at the top of the stencil for shapes you regularly use.

CLOSING A STENCIL

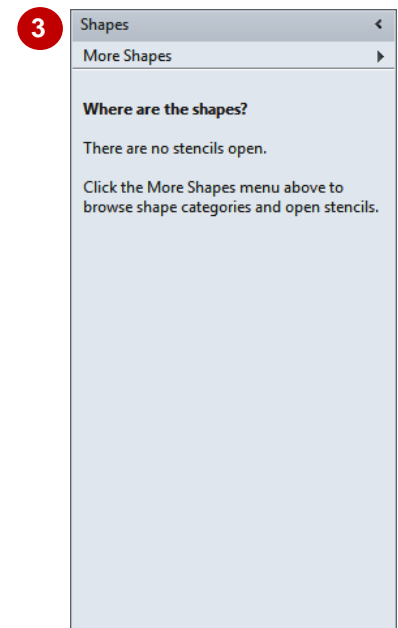
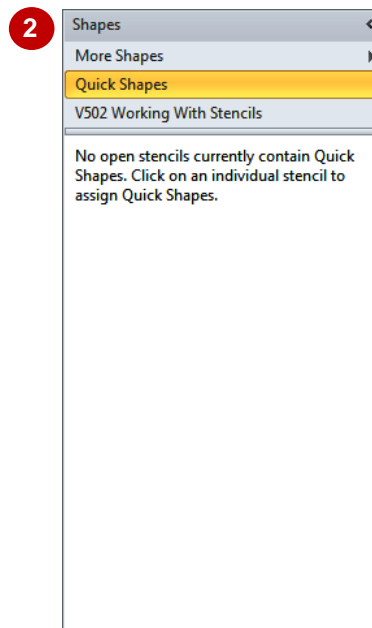
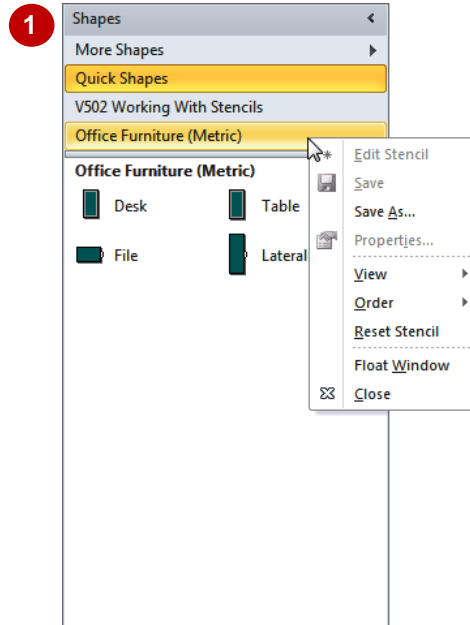
Once you have finished using a specific stencil for your drawing or perhaps while you are creating or editing a custom stencil, you can close it and remove it from the **Shapes** window.

Being able to close unwanted stencils is particularly useful if you have quite a few open as this will minimise the number of stencils that you need to scan while looking for shapes for your drawing.

Try This Yourself:

Continue using the previous file with this exercise...

- 1 Right-click on the **Office Furniture** title bar
- 2 Select **Close**
The *Office Furniture* stencil will close...
- 3 Repeat the above steps to close the **V502 Working With Stencils** stencil



For Your Reference...

To close a stencil:

1. Right-click on the stencil's title bar
2. Select **Close**

Handy to Know...

- You cannot close the **Quick Shapes** stencil as it is dynamically generated based upon the stencils that are open in the **Shapes** window.

