CHAPTER 15 # CALENDARS

INFOCUS

WPL_V514

One of the special purpose stencils in Visio is designed for creating *calendars*. Calendars are an essential part of a project schedule – highlighting key dates, displaying timelines and providing an overview of the time available for a project.

In this session you will:

✓ learn how to create a calendar
✓ learn how to add text to a calendar
✓ learn how to add art to a calendar
✓ learn how to add a multi-day event to a calendar
✓ learn how to add a thumbnail month
✓ learn how to apply a theme to a calendar.

CREATING A CALENDAR

Using the *calendar* shapes, you can quickly create various types of calendars. For instance, you can create a calendar for a year, month, week, multiple weeks, a single day, and more. As you drag a shape onto the page, Visio displays a dialog box into which you can nominate your settings, such as controlling whether a week starts on a Sunday or Monday, date format and so on.

Try This Yourself:

Before starting this exercise ensure no files are open in Visio...

1 Click on the *File* tab, click on *Schedule* under *Template Categories*, click on *Calendar* and then click on **[Create]** to create a new drawing

The Calendar Shapes stencil will open in the Shapes window...

2 Drag the *Month* shape onto the page

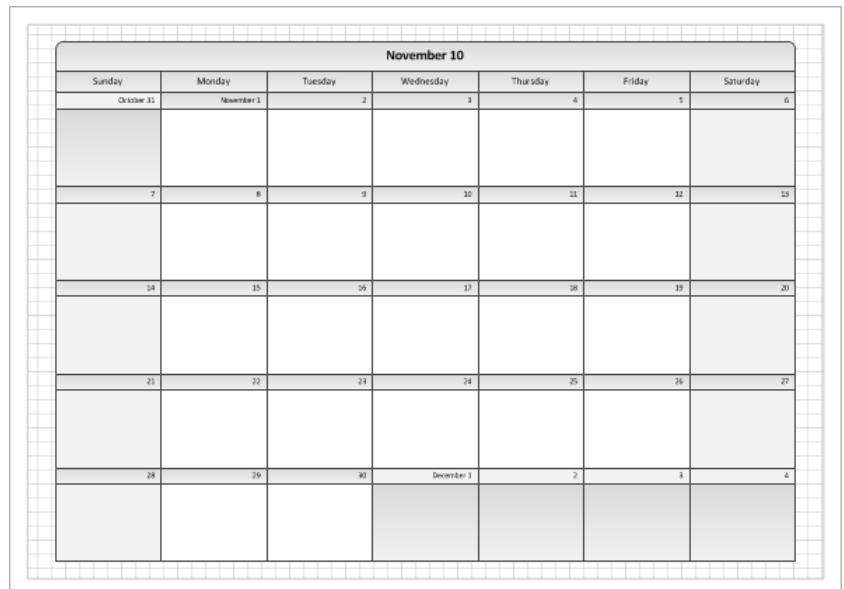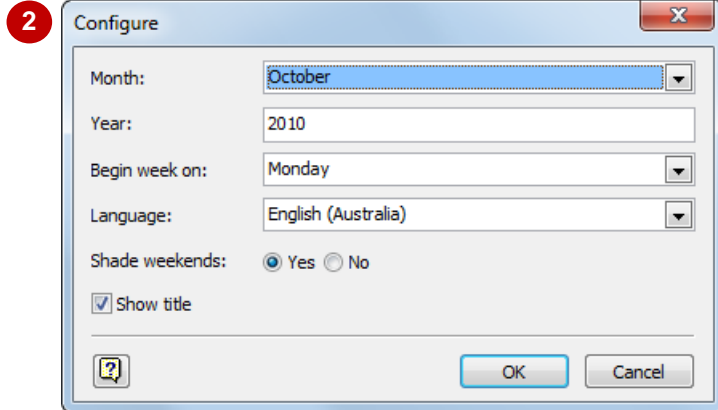*The Configure dialog box will open…*

3 Click on the drop arrow ▾ for *Month* and select next month

4 Ensure the appropriate year appears in *Year*

5 Click on the drop arrow ▾ for *Begin week on* and select *Sunday*

6 Ensure that *Shade weekends* and *Show title* are selected, then click on **[OK]** to create the calendar

Because of the shading, it's very easy to distinguish the week days from the weekends

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Configure			✕
Month:	October		
Year:	2010		
Begin week on:	Monday		
Language:	English (Australia)		
Shade weekends:	● Yes ○ No		
☑ Show title		OK	Cancel

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For Your Reference…

To *create* a *calendar*:

1. Select **File** > **New** > **Schedule** > **Calendar**
2. Drag the desired calendar shape onto the drawing page
3. Select the desired options
4. Click on **[OK]**

Handy to Know…

- If you want to create additional monthly calendars, insert a new page in the drawing and then place the *Month* shape on the new page.


ADDING TEXT TO A CALENDAR

Once you have drawn a calendar, you can simply click on a date and start typing to add text to the calendar. You may want to add details about appointments, mark special events, record local public holidays, or record other scheduling information. You can apply basic formatting to the text such as changing the font type, size and colour; apply bold or italics and so on.

Try This Yourself:

Same File

Continue using the previous file or open V514 Calendars_1.vsd...

1 Click on a Monday in the calendar to select it

2 Type **Celebration Day**

The page may magnify automatically so you can see what you are typing...

3 Click on the drop arrow ▼ for *Font Size* and select *12 pt*

4 Click on *Bold* B to apply bold to the text

5 Click to the left of *Celebration*, press [Enter] twice to move the text to the centre of the cell and then click on *Align Centre* ≡

You can also edit existing text…

6 Double-click on the month name, delete the year, increase *Font Size* to *16 pt* and change *Font Colour* to *Dark Red* (under *Standard Colours*), then press [Esc] twice

7 Click on *Fit page to current window* ⊞
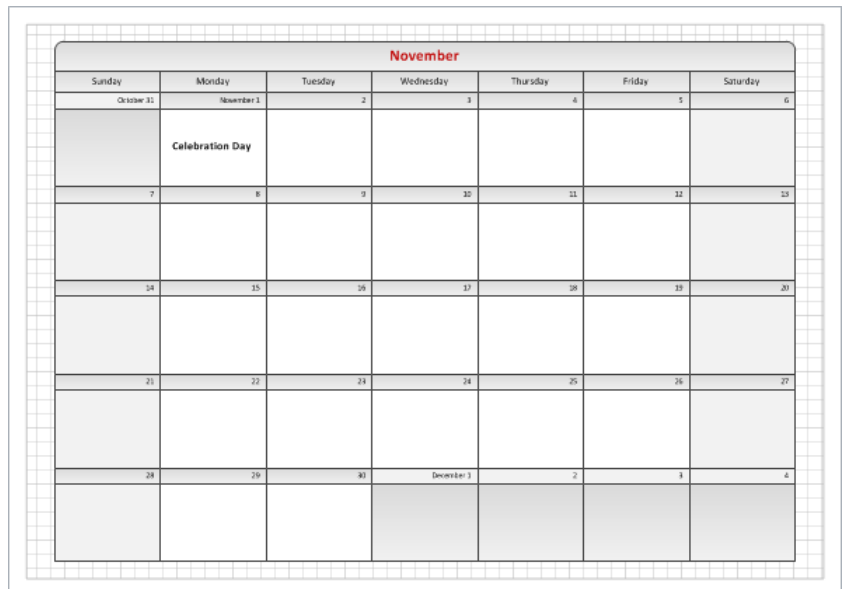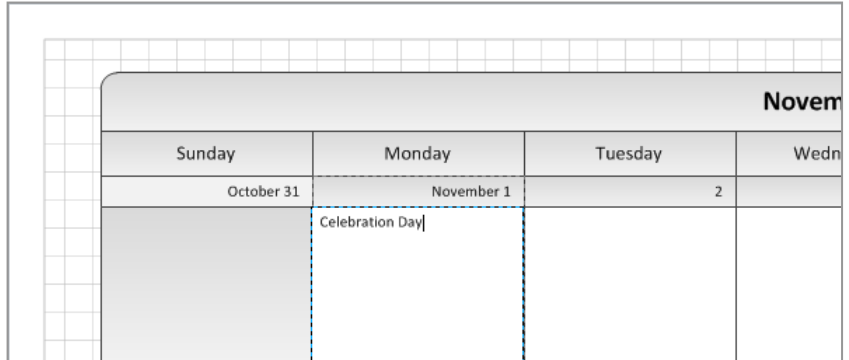

For Your Reference…

To **add text** to a day in a calendar:

1. Click on the appropriate day
2. Type the text
3. Format the text as required
4. Press [Esc] twice

Handy to Know…

- When you have finished editing text, press [Esc] twice to deselect the text and the calendar cell.

ADDING ART TO A CALENDAR

Important dates and single-day events such as milestones, functions or deadlines can be highlighted on a calendar by using art such as the **Important**, **Milestone**, **Kickoff** and **Completion** shapes. You could also use the **Circle label**, **Square label** or **Star label** shapes to colour code and co-ordinate events.

Try This Yourself:

Same File

Continue using the previous file or open V514 Calendars_2.vsd...

1. Drag the **Important** shape onto any day in the calendar

   You can immediately add text to explain the symbol in the calendar...

2. Type **Blueprint due today**

   The text may overlap the next day, but that's ok…

3. Click before **due** and press Enter

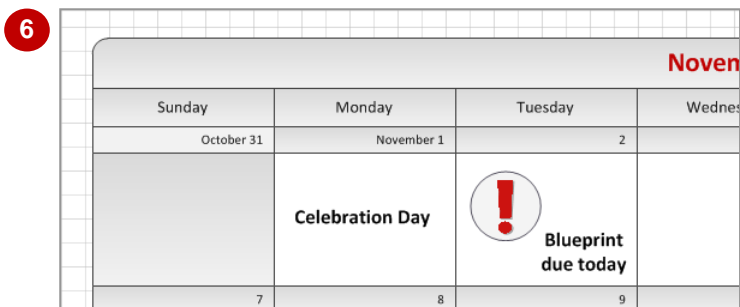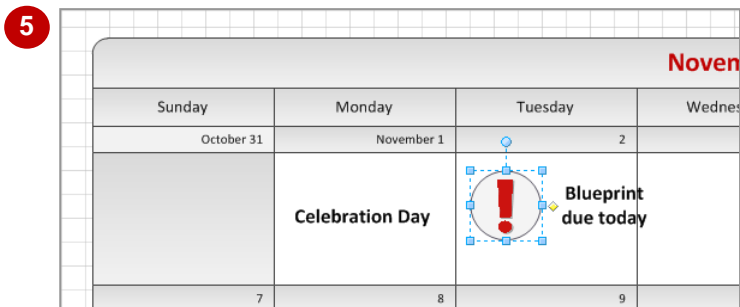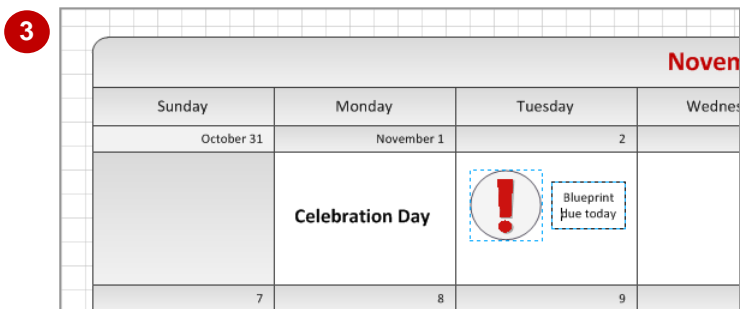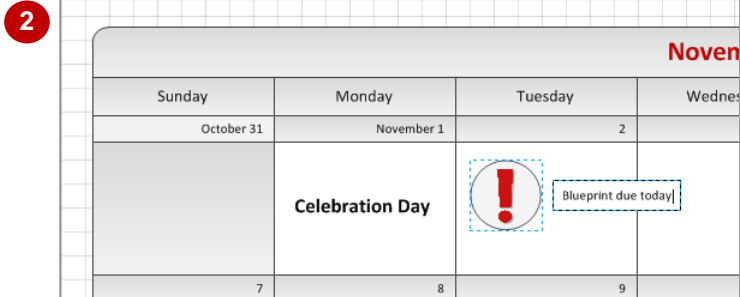4. Format the text as *12 pt* and **Bold**

   You can move the text if desired…

5. Press Esc to deactivate edit mode, then zoom up to *100%* (if necessary)

   Notice the yellow diamond move handle ◇…

6. Drag the move handle ◇ to move the text so that it fits in the cell, then press Esc to deselect the shape

For Your Reference…

To **add art**:

1. Drag the required shape onto the calendar
2. Type the required text label
3. Format and move the label as desired

Handy to Know…

- The art and label shapes are not appropriate for yearly calendars – they are specifically designed for use in monthly and weekly calendars.

ADDING A MULTI-DAY EVENT TO A CALENDAR

Events and periods that extend for several days or weeks can be indicated on a monthly calendar using the *Multi-day event* shape. This is especially useful to indicate periods of examinations, phases during a project and fixed timeframes such as formal holiday periods. The *Multi-day event* shape can be formatted and resized to your requirements and can include text.

Try This Yourself:

Same File

Continue using the previous file or open V514 Calendars_3.vsd...

1 Change the *Zoom* so that you can see an entire week

Let's add a week-long event...

2 Drag the *Multi-day event* shape onto the start of an empty week in the calendar

The Configure dialog box will appear...

3 Type **Process Review** in *Subject*, then press Tab

4 Type **Meeting Room 3** in *Location*

5 Click on the drop arrow for *End date* and click on the date for the Friday at the end of the week

6 Click on **[OK]**, then press Esc to see the event more clearly

Let's format it…

7 Double-click on the text, format it as *12 pt* and *Bold*, click on *Align Centre* ☰, then press Esc

8 Ensure the shape is selected, change the colour of the *Fill* to *Line, Lighter 80%* (row 2, col 4), then press Esc

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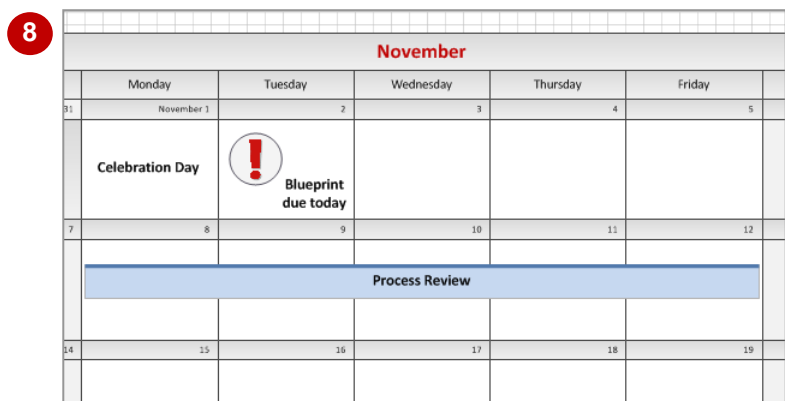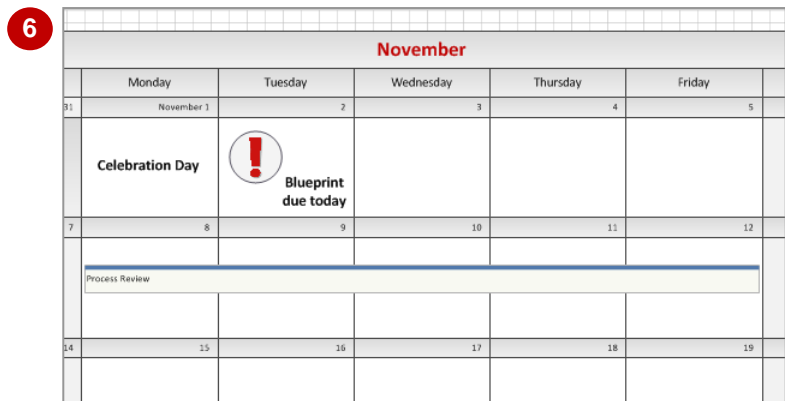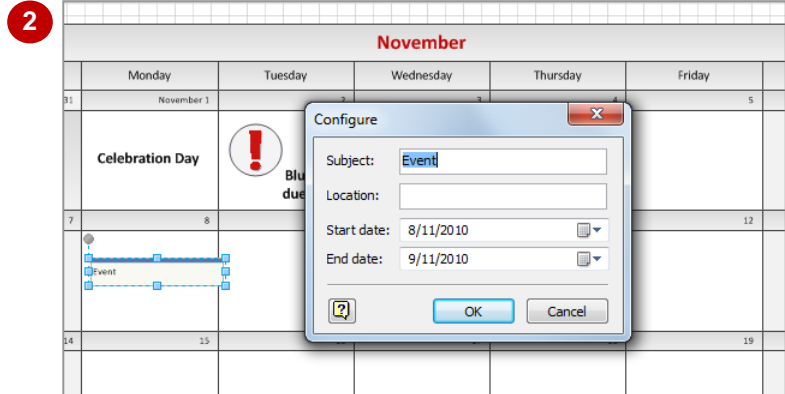
For Your Reference…

To *add* a *multi-day event*:

1. Drag the *Multi-day event* shape onto the calendar
2. Set the required *Configure* options
3. Click on **[OK]**
4. Format the text and shape as desired

Handy to Know…

- You can add a one-day or partial-day event, such as a meeting or conference, using the *Appointment* shape. To do this, drag it onto the desired day and then enter the start and end times, subject and location in the *Configure* dialog box.

ADDING A THUMBNAIL MONTH

When you are using a monthly calendar, it is often useful to have both the previous month's and the following month's details displayed on the current calendar page. The *Thumbnail*

month shape is ideal for this purpose. This feature can be used with monthly calendars, as you will see here, or with yearly calendars to preview the first few months of the upcoming year.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file V514 Calendars_4.vsd...

1 Drag the *Thumbnail month* shape onto a blank day in the previous month – the *Shape Data* dialog box will open

If your current month starts on a Sunday, place the thumbnail on a spare date in the following month....

2 Ensure that the *Month* and *Year* are correct

3 Select *Sunday* in *Begin week on*, then click on **[OK]**

4 Zoom into *100%*, then drag the handles of the thumbnail to resize it to fit the cell

You may need to move it as well…

5 Press ⎡Esc⎤ to deselect the shape

6 Repeat the above steps to add another thumbnail for the following month, and place it on a blank day in the next month

7 Click on *Fit page to current window* 🔲
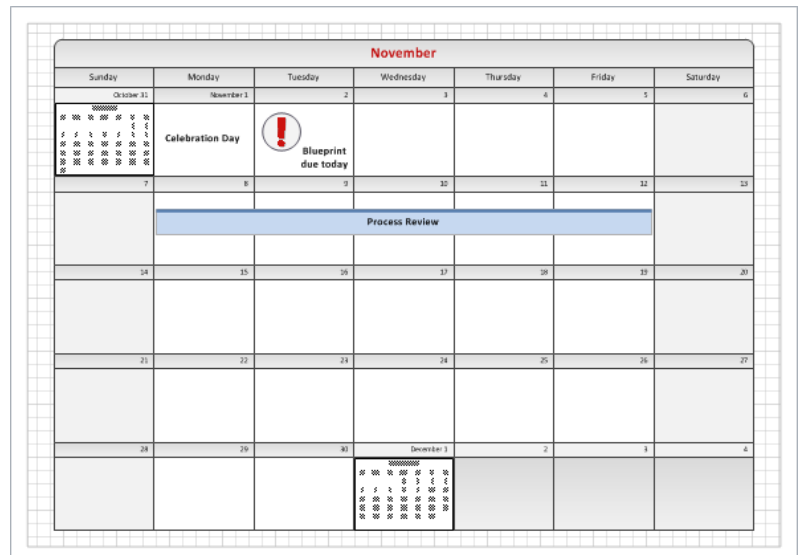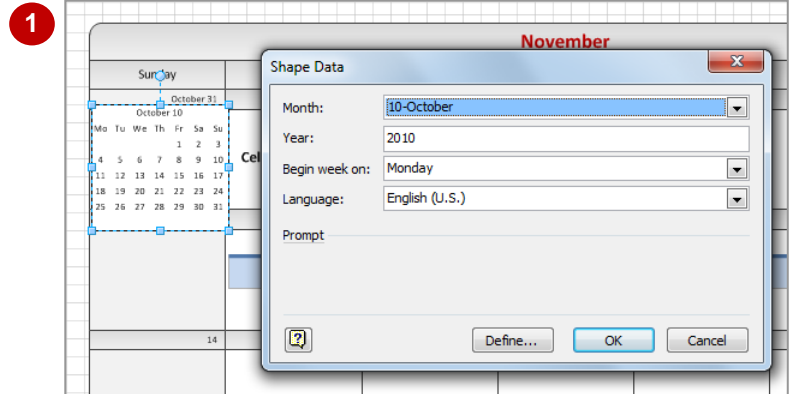
For Your Reference…

To *add* a *thumbnail month*:

1. Drag the *Thumbnail month* shape onto the calendar
2. Select the appropriate *Month* and *Begin week on*
3. Click on **[OK]**

Handy to Know…

• You can change the month represented by a *Thumbnail month* shape. Right-click on the shape and select **Configure** to open the *Shape Data* dialog box. Select the required *Month* and click on **[OK]**.

CHANGING THE CALENDAR THEME

By default, calendars appear in shades of black and white. This is because Visio does not apply a theme to them. Visio provides a range of built-in themes from which you can select to make the calendar more striking or you can create your own colour and effects themes to suit particular business standards or preferences.

Try This Yourself:

Same File

Continue using the previous file or open V514 Calendars_5.vsd...

1 Click on *Fit page to current window*

2 Click on the *Design* tab, then click on *Colours* to open the *Colours* gallery

Rather than choosing a built-in theme, let's select a theme colour and theme effect separately…

3 Point to several theme colours to see how they will apply to the calendar, then click on *Urban*

4 Click on *Effects* to open the *Effects* gallery

5 Point to several theme effects to see how they will apply to the calendar, then click on *Subdued*

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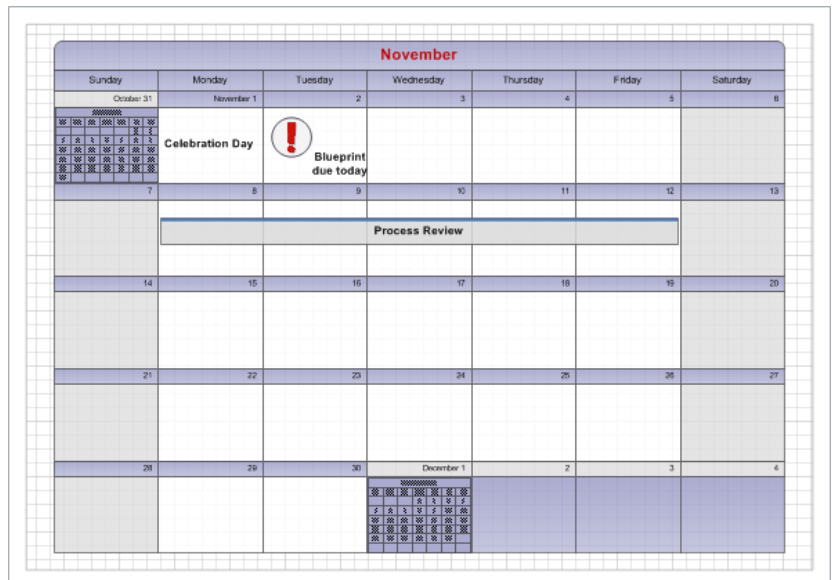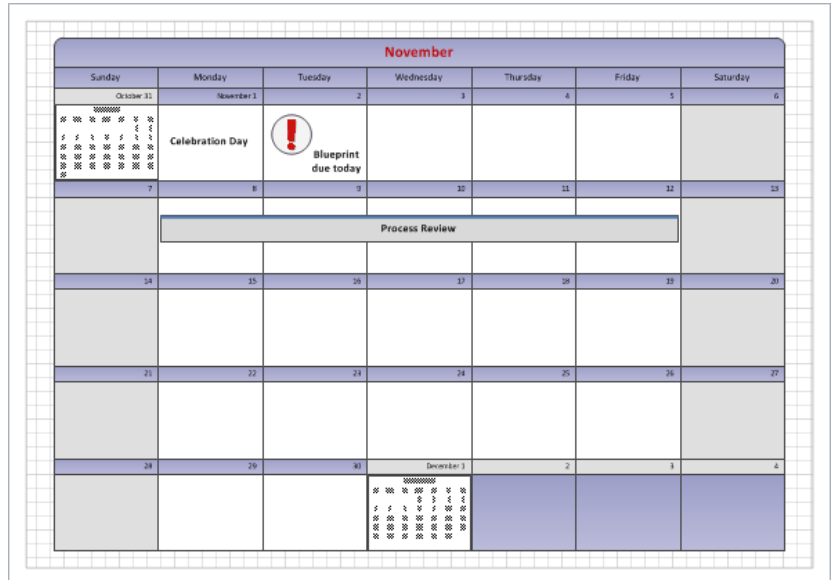
For Your Reference…

To *apply* a *theme* to a calendar:
1. Click on the *Design* tab
2. Click on the *More* button for *Themes* and select a theme, or
   Click on *Colours* and select a colour and/or click on *Effects* and select an effect

Handy to Know…

- You will probably find it best to apply a more subtle effect to a calendar – such as *Subdued*, *Simple Shadow*, *Square* or *Pinstripe* – if you choose to apply one at all. This will especially be the case if you have added thumbnail months to your calendar.

NOTES: