

# Crabby diagrams it for you with Visio 2007

Applies to: Microsoft Office Access 2007, Visio 2007, Access 2003

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**Crabby Office Lady**

**Visio 2007 has some impressive new and updated features that no other program has. And of course, you'll be working in that familiar Office environment, which is always...comforting. So even if you're new to Visio, take a moment to read this column: You may realize that this is the program for some of your more complicated projects.**

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In a nutshell, Visio is drawing and diagramming software. Sounds like fun, doesn't it? Frankly, it is. For example, rather than working with complicated text formatting and tables, you can create a Visio diagram that will explain everything at a glance. And instead of static pictures, you can create data-connected diagrams that display your data and are easy to update. People use Visio for such things as figuring out how to streamline business processes, displaying hierarchies, creating floor plans and office spaces, and visualizing complicated network infrastructures (even typing that is complicated, and I barely know what it means anyway).

In other words, Visio is a pretty useful tool, and it's not hard to learn. (I know this because I've never been a Visio expert — in fact, I rarely write about it. But I have now changed my Zune, I mean my *tune*.) The program comes with diagrams, drawing templates, shapes, drawing tools, and even samples so you can start working right away. It's easy to get started and, frankly, Visio can be a lot of fun to just mess around with (not that I'm doing that on company time...*ahem*...) And then once you get the hang of it, you'll find all sorts of uses for it — it's pretty versatile.

## OK, you convinced me: Now what?

Maybe I've convinced you to keep reading. If so, let's explore what the new version of Visio has to offer. I can't cover everything, because there is a lot. So, once again, if you want to know more, head on up to the **See also** box in the top right corner of this column for more resources.

Before I get too deep into this, I need to tell you that Office Visio 2007 is available in two stand-alone editions, Office Visio Professional and Office Visio Standard. Visio Standard has the same basic functionality as Visio Professional but contains a subset of its features and templates. Office Visio Professional includes advanced functionality, such as data connectivity and visualization features, that Office Visio Standard does not.

For example, Visio Standard is best for folks who need to visualize, document, communicate, and share ideas using professional-looking flowcharts, office layouts, organization charts, project timelines, and so on.

Visio Professional is more for folks in IT, engineering, and software development (you know the people you made fun of in school, the smart and geeky ones, the ones who now rule the technological universe). It has more data connectivity functions and things like engineering schematics and network diagrams.

I'm guessing that most of you reading this column will just need Visio Standard, but I could be wrong, so I'll cover some of the new stuff for both editions.

## What's new

In both editions, you begin a diagram with a template, which opens up a drawing page and a **Shapes** pane that contains stencils that you drag onto the page.

#### In both Visio 2007 Standard and Visio 2007 Professional

- **AutoConnect** New AutoConnect functionality takes all the work out of connecting shapes. This feature automatically connects, evenly distributes, and aligns shapes for you — with only a couple easy clicks (of your mouse, not your ruby slippers).
- **Sample diagrams** Visio 2007 comes with sample diagrams that have data already in them so that you can get ideas of how to create your own diagrams. It's a bit like show-and-tell, but even more to the point.
- **Themes** Your diagrams are going to look fabulous, and all you need to do is choose a color or an effect for an entire page, diagram, or multiple diagrams.
- **Support for PDF and Microsoft XPS formats** Save diagrams in PDF format and the new Microsoft XPS file format to make them more portable and reach a wider audience. Disseminating your ideas on how to reorganize the company has never been so easy — although still just as dangerous as it is tempting.

And now onto some cool, new things Visio 2007 Professional offers.

#### In Visio 2007 Professional

- **Data Link functionality** Now you can connect any Visio diagram to a wide variety of data sources, such as Excel worksheets, Access databases, and Microsoft Windows SharePoint Services lists. You associate all the shapes in a diagram with data by using the **Automatic Link Wizard**, which matches rows in the data source with shapes in your drawing. This new functionality makes grabbing data from these sources a whole lot easier (and this is when it's OK to grab).

**NOTE** Don't let this functionality scare you away. We offer a three-part training course on how to do it. Look in the **See also** box at the top of the page for the link to the first course.

- **PivotDiagrams** Just like with PivotTables, you can view your data in a more organized fashion. A PivotDiagram is a collection of shapes arranged in a tree structure that helps you to analyze and summarize data in a visual, easy-to-understand format. Look at it in hierarchical form, pick out the key messages, and then convey it all in one diagram that everyone "gets."

**NOTE** Don't be afraid of PivotDiagrams, either. I've included a demo so you can get an idea of how it all works.

- **Data Graphics** Now you can visualize and communicate complicated information by showing your data with shapes, inside a diagram. A data graphic presents your data as a combination of textual and visual elements, such as flags and progress bars.

**NOTE** Check out the demo I've linked to at the top of the page to see how useful (not to mention cool) this feature is.

To wrap up, there are many more new and improved features in both editions of Visio 2007 designed to make your life (at work, anyway) more efficient and manageable. As you know, a picture tells a thousand words; a thousand words makes your audience's eyes glaze over...

**"An attempt at visualizing the Fourth Dimension: Take a point, stretch it into a line, curl it into a circle, twist it into a sphere, and punch through the sphere." — Albert Einstein**

## About the author

[Annik Stahl](#), the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.

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**Crabby Office Lady**

**E-mail communication has become as natural as breathing. But when you have both Outlook and Outlook Express on your computer, which one should you use? Let's take a closer look so that you can decide which one is right for you.**

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Many of you have written to me asking burning questions about Microsoft Outlook® Express. I'm going to say this just once, so listen up:

## Outlook Express is NOT an Office product

(This doesn't mean to say that I don't care about it or can't offer you some modicum of advice on it. I'm just saying that it's not part of the Microsoft Office System.)

Outlook Express is a basic e-mail program that is included with Microsoft Internet Explorer. It's free, and while it allows you to send and receive e-mail, it doesn't do all the wild and wonderful things that its big brother Microsoft Outlook® can do (which is not free, unless you're a pirate). And so, you may wonder, what is the point of this column if Outlook Express isn't an Office product? And furthermore, what's the point of even using Outlook Express when Outlook has so many more bells and whistles?

























Frankly, that is the point: You have a choice. Maybe you need neither bells nor whistles. Maybe bells and whistles scare you. Maybe you're not interested in purchasing bells and whistles at this time since bells and whistles do not impress you in the least.

And because so many of you write about Outlook Express (just to annoy me, no doubt), I've decided to devote an entire table to fleshing out some of the similarities and differences between the two programs. Then you can make up your mind as to which one is right for you.

**NOTE** While you *can* use both Outlook and Outlook Express on the same computer, you need to think carefully about how you're going to use each program. At work, you may choose to use Outlook for both your personal account and your corporate account. Or, you may want to use Outlook for your work e-mail and Outlook Express exclusively for your private e-mail. Consider this: If you read a piece of e-mail in Outlook Express, it stays in Outlook Express until you delete it. This means it won't be there for you when you are feeling more Outlook-ish later in the day because you already downloaded it from your e-mail server (to another program). What I'm saying is that you probably don't want to access the *same* e-mail account on the *same* computer using two different programs — the e-mails on that account will then be divided between two different programs on the same computer.

**Another note** What I said in the first note about using both programs on the same computer is completely moot if you use an IMAP server. (This means that all of your e-mail stays on the server, so it doesn't matter where you go to retrieve it. It's always in the folder you create on the server until you delete it or until the spam cops come and take it —and you — away.) The same also applies to any Web-DAV account, which includes MSN and MSN Hotmail. If some of the terms I'm using are starting to confuse you, read my column [Demystify e-mail terms and get on with your life](#). Then get right back here.

FEATURES	OUTLOOK EXPRESS	OUTLOOK 2003 AND 2002
Ability to send and receive e-mail		

<b>Support for IMAP, HTTP, and POP Internet e-mail servers</b>		
<b>Support for Microsoft Exchange Server</b> (Our messaging platform, which makes online forms, scheduling, and collaboration possible)		
<b>Address book and Contacts folder</b> (Used to store and retrieve e-mail addresses)		
<b>Support for multiple address books</b>		
<b>Support for a fully-integrated calendar</b> (Includes meeting and event scheduling, appointments, and group calendars)		
<b>Tasks folder</b> (A list of personal or work-related errands that you want to track through completion)		
<b>Junk mail filter</b>		
<b>Notes folder</b> (The electronic equivalent of paper sticky notes)		
<b>Support for newsgroups</b> (A newsgroup is a collection of messages posted by individuals to a news server, or a computer that can host thousands of newsgroups) NOTE While it may appear that Outlook 2003 does have newsgroup support, when you launch the newsreader, it actually opens in an Outlook Express window.		
<b>Signatures and stationery</b>		
<b>Secure e-mail messaging</b>		
<b>Auto backup (archive) functionality</b> This keeps your mailbox manageable. You need to store old items that you want to keep but don't need immediate access to, and you also need a way to move those old items to the archive location automatically.		

And there you have it. There are, of course, other features that these two programs share, and then there are other features that are particular to Outlook on its own or to Outlook in cahoots with Microsoft Exchange Server. But you get the main idea.

For more information about migrating to and fro (or fro and to), or if you want to know more about each program before deciding, take a look at the **See also** section of this column.

Look at it this way: Sometimes you want a full-course dinner with all the fixins', and sometimes you want to just swing by the drive-through. If you're like me, a well-balanced diet of both will keep you and your communications healthy.

**"The first step to getting the things you want out of life is this: Decide what you want." — Ben Stein**

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