A Beginner’s Guide to MS Visio for AcciMap

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**Step 1: Basic Layout Loading, Level selection and Arrangement**

**Getting started:**
1. On the File tab, click New.
2. Under Other Ways to Get Started, click New from existing.
3. In the New from Existing Drawing dialog box, navigate to the custom template that you want, and then click Open.

**Starting Page:**

![Starting Page](image-url)
Add New Level in between two levels or at the beginning/end:
Keeping pointer tool selected, navigate to the left of the line separating two levels or the end of the last level. The pointer will automatically transform to a right-pointing blue arrowhead. Click to add new Level.

Right-pointing blue arrowhead:

Click to add new Level:
Renaming Title / Level Heading:
For renaming Title/Level heading, bring mouse over the Heading to be renamed, double click on it.

Screen changes as follows:

Type the suitable heading (you can also add suitable text formatting similar to MS-word):
Click outside in the grey area outside the workspace when done to confirm the new heading:

Removing Levels:
Single Click on the Heading of a level.
Screen displays a yellow dotted line around the whole Area enclosed by Level:
Click the Delete key on the Keyboard to delete the Level:

Note: Any contents of the level will also be deleted.

**Changing Height of individual Levels:**
Place mouse pointer in the line separating two levels with pointer tool selected. Mouse pointer changes into the following shape:

Moving the mouse up or down while keeping the left mouse button pressed will change the height of the particular level as follows (in this case external):

Note: Level width can also be changed in a similar fashion. However, changing width of one level affects all other levels too.
Step 2: Causal Factor Addition and Editing

Addition of a new factor:
Go to the process shape in the left portion of the window.

Drag and drop into the desired label.
Finally click on the grey area outside the workspace.

Editing/Entering the content of the Causal factor:

Double click on the causal factor whose contents you wish to edit.
Type in the Keyword(content) for the particular causal factor.

(Note: You can format the text as desired similar to MS Word)

Click on the grey area outside the workspace when finished to return to normal view.
Resizing and Deleting the Causal factor:

Single click on the Causal Factor.

Delete:
Simply press the delete key on the keyboard to delete the causal factor.
(Note: Deleting the shape deletes all of its contents as well as connections to and from it)
Resize:

Take the mouse pointer to the small boxes present in the four corners and the middle of the edges in order to resize the shape. The mouse pointer turns to the following shape:

Resize the shape by holding down the left mouse button while dragging the mouse pointer.

Click on the grey area outside the workspace when done with resizing.
Drag and Drop to another position:
The Causal factors can simply be dragged and dropped to a new position by holding down the left mouse button on it, moving it to new position and then releasing the left mouse button.

Pro Tips: You can Make use of the yellow guidelines for auto positioning at the middle of labels or with equal spacing between the Causal Factors etc.
Also it is advisable to use CTRL C + CTRL V; followed by renaming and repositioning in case you don’t want to set the font properties for the keyword again and again or to have equal size of boxes for the Accimap for maintaining a uniformity.
Step 2: Addition and alignment of Connectors between Causal Factors:

**Adding a new connector:**

Step 2-1: Select the **Connector tool** and bring the mouse pointer to the middle of the bottom edge of the Causal Factor from which the connector should start. A small red box is visible and mouse pointer change into “+” shape.

Step 2-2: Click down on the left mouse button and while holding the mouse down drag the pointer to the middle of the top edge of the target Causal Factor.
Step 2-3: Release the left mouse button and you have successfully added a connector.

Multiple Connectors can be added in similar fashion:

Step A:
Step B:

Step C:
Removing a connection:
Click on the arrowhead (or sometimes part of the edge) of the connector you wish to remove.

Press the Delete Key
Restructuring/Modifying a connection for better presentation:
Click on the Connector you want to restructure. (note select Pointer tool first if don’t have it selected)

Move mouse pointer to midpoint of the branch you want to move/reorder
Drag the midpoint to the new location and release. **(Note: You'll get a snap to geometry message if you want to fuse the horizontal branches together for a neater presentation)**
Pro Tips:

Selecting multiple shapes and moving them together:
This can be used to make room for a new factor/restructuring/addition of new sublevel.

Click down on the left mouse button and drag to draw a rectangle and enclose all shapes (Causal Factors) you wish to move together.

Release the mouse button. Selected shapes are highlighted in pink.
You can now resize/move/delete the collection similar to working with a single Causal Factor.

Note:
1) Adding a new Causal Factor on the region occupied by connectors will cause the connectors to join to it (splitting the connector). Hence avoid placing new Causal factors over Connectors.

To prevent this from happening and cause placing a new shape over connectors to auto route the connectors CTRL +C and CTRL + V the First Causal Factor Shape provided to you in the template which has its behaviour modified.

To manually modify behaviour of a new shape, first activate Developer options as: File => Options =>Customize Ribbon. Click on the Developer check box.

Now, select the shape and go to the Behaviour option under Developer tab.
A dialog box appears
Uncheck the “shape can split connectors” option under connector splitting.

2) On dragging and dropping a Causal Factor to a new position the connector remains attached and does not get disconnected. It only reroutes.