Visio Introduction / Intermediate – 2 days

Course Objectives

Visio helps you transform your ideas and information into understanding and action. Students will learn basic concepts for creating flowcharts, and organisation charts. This includes learning the basics for using and creating shapes, printing drawings, creating custom stencils, and many timesaving shortcuts and techniques designed to increase user productivity.

Prerequisites

This course assumes that you have gained a basic understanding of Windows. This includes an ability to work with multiple windows and navigate the desktop, as well as having an understanding of computer file storage (i.e. drives, files and folders).

Exercises

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

TOPICS

Getting to Know Visio

- Understanding the Start Screen
- Creating a New Drawing From a Template
- The Visio Screen
- How Microsoft Visio Works
- Using the Ribbon
- Minimising the Ribbon
- Understanding the Backstage View
- Accessing the Backstage View
- Using Shortcut Menus
- Understanding Dialog Boxes
- Launching Dialog Boxes
- Understanding the Quick Access Toolbar
- Adding Commands to the QAT
- Understanding the Status Bar
- Customising the Status Bar
- Saving a New Drawing

Working With Stencils

- Understanding Stencils
- The Shapes Window
- Quick Shapes
- Using Quick Shapes
- Creating a Custom Stencil
- Opening a Stencil
- Editing a Stencil
- Closing a Stencil

Working With Shapes

- Placing Shapes From a Stencil
- Selecting Shapes
- Resizing Shapes
- Moving Shapes
- Copying Cutting and Pasting Shapes
- Duplicating Shapes
- Rotating and Flipping Shapes
- Ordering Shapes
- Merging Shapes to Create New Shapes
- Grouping and Ungrouping Shapes
- Aligning Shapes
- Aligning Shapes Using the Dynamic Grid
- Distributing Shapes
- Changing Shapes
- Using Snap and Glue

Formatting Shapes

- Applying Quick Styles
- Formatting the Fill
- Formatting Lines
- Applying Effects
- Using the Format Painter
- Using Undo and Redo
- Protecting Shapes

Working With Connectors

- Connecting Shapes
- Automatically Adding Connected Shapes
- Connecting Existing Shapes
- Inserting and Deleting Shapes
- Adding Text to Connectors
- Changing Connectors
- Working With Connection Points
- Formatting Connectors

Working With Text

- Adding Text to Shapes
- Formatting Text
- Adding Text to the Page
- Editing Text
- Using Find and Replace
- Aligning Text
- Moving Text
- Creating Bulleted Lists
- Creating Tables
- Spell Checking Text

Working With Pages

- Inserting Pages
- Naming Pages
- Duplicating Pages
- Changing Page Order
- Deleting Pages
- Applying a Background Style
- Adding Headers and Footers
- Inserting a Logo
- Assigning a Background Page to Other Pages
- Page Size and Orientation

Page Tools

- Understanding Page Tools
- Zooming
- Panning
- Using the Pan and Zoom Window
- Displaying Grids and Rulers
- Changing Grids and Rulers
- Setting Guides and Guide Points
- Using Guides and Guide Points
- Working With Rulers
- Changing the Scale

Themes

- Understanding Themes
- Applying a Theme
- Applying a Theme Variant
- Highlighting Shapes With Quick Styles
- Embellishing Shapes
- Creating a Custom Theme
- Creating Custom Theme Colours

Organisation Charts

- Creating an Organisation Chart From Scratch
- Adding Multiple Shapes
- Changing a Position Type
- Changing the Layout of Shapes
- Changing the Spacing of Shapes
- Creating a Team
- Changing the Order of Shapes
- Adding a Title
- Inserting Pictures
- Formatting an Organisation Chart
- Adding Shape Data
- Creating Shape Data Fields
- Creating a Custom Shape and Stencil
- Creating Master Shape Data Fields

Organisation Chart Data

- Creating an Org Chart From Employee Data
- Creating an Org Chart From a New Data File
- Adding Employee Data
- Exporting Data
- Comparing Versions
- Creating Synchronised Copies
- Synchronising Subordinates

Calendars

- Creating a Calendar
- Adding Appointments to a Calendar
- Adding a Multiday Event to a Calendar
- Adding Text to a Calendar
- Adding Art to a Calendar
- Adding a Thumbnail Month
- Formatting Calendars

Cross Functional Flowcharts

- Understanding Cross Functional Flowcharts
- Creating a Cross Functional Flowchart
- Adding Swimlanes
- Adding Swimlane Labels
- Adding Phases
- Adding Shapes
- Adjusting Swimlanes and Phases
- Formatting Cross Functional Charts

Gantt Charts

- Understanding Gantt Charts
- Understanding Gantt Chart Options
- Creating a Gantt Chart
- Entering Task Details
- Creating Subtasks
- Linking and Unlinking Tasks
- Adding and Deleting Tasks
- Adding Milestones
- Adding and Hiding Columns
- Navigating a Gantt Chart
- Formatting Task Bars
- Managing the Timescale
- Exporting From a Gantt Chart
- Importing Data Into a Gantt Chart
- Printing Gantt Charts