



Visio Master Class

1 Day | Virtual and Face-to-Face

Most of us learn Visio by doing. For example, we may get started because a boss or a colleague says:

"We need a flowchart of this process. By tomorrow."

or

"Fred created this diagram before he left. Can you update it for Monday's meeting?"

or

"Can you create an org chart of our division?"

Having started that way, we get by, but haven't had formal training or time to discover better techniques. But what if you could:

- Create content-rich process maps that include data visualizations and hyperlinks – maps that become the central repository for all process knowledge.
- Enter process data into Excel and have Visio build a flowchart or swimlane diagram for you automatically.
- View employee performance data displayed as icons, graphs, and colors on your organization charts – and have the graphics update automatically when the data changes.
- Collaborate with colleagues and customers – even those who don't have a Visio license – by incorporating comment threads in your Visio diagrams.

In this hands-on workshop, you'll learn to do all of that and more. In addition, you'll learn a set of keyboard shortcuts that are guaranteed to make you more efficient. You'll discover themes, variants, and styles that make your diagrams look more professional. And you'll take advantage of an underutilized but exceptionally useful collection of features for adding structure – both logical and visual – to your diagrams. You'll also learn where and how to publish diagrams so anyone with a web browser can view them without needing a Visio license.

Spend the day learning valuable Visio techniques and secrets from the guy who wrote the book about Visio.

Learning Objectives

- Use Visio more effectively
- Leverage the power of having data in diagrams
- Create BI dashboards with Visio
- Add structure to diagrams to increase diagram value
- Share and collaborate on diagrams with people who don't have Visio

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Intended Audience

This course will benefit any person in an organization of any size who wants to become a Visio power user. The techniques presented can be used to create flowcharts, organization charts, floor plans, and many other types of diagrams.

Prerequisites

Experience with one of the desktop versions of Visio (Standard, Professional, Visio Plan 2) is necessary. To get full value from this workshop, either Visio Professional or Visio Plan 2 is required to learn about and use the data-related features of the software. If you only have the Standard edition of Visio, you will not be able to participate in many of the classroom exercises.

Learning Topics

Topic
Key Visio Skills
<ul style="list-style-type: none">• Leveraging the Dynamic Grid, AutoConnect, and Quick Shapes• Text DOs and DON'Ts• Using containers, lists, and callouts
Working with Data
<ul style="list-style-type: none">• Working with Shape Data• Linking diagrams to data in Excel, Access, SharePoint, or any database• Visualizing data with data graphics: text callouts, data bars, icons sets, color by value
Collaborating in Visio
<ul style="list-style-type: none">• Viewing diagrams without Visio: Leveraging SharePoint Online and OneDrive for Business• Collaborating and commenting on Visio diagrams
Advanced Topics
<ul style="list-style-type: none">• Creating custom shapes, stencils, and templates• Integrating Visio with PowerBI (optional)