Microsoft Visio Training

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Duration: **2 Day**

Overview

Microsoft Visio is a powerful visualisation tool for creating, designing, and managing professional diagrams, process maps, organisational charts, and a wide range of technical and business drawings.

This **two-day course** takes participants from the fundamental features of Visio through to more advanced diagramming and customisation techniques. Learners work with Shapes and Connectors, create organisation charts and flowcharts, improve diagrams through formatting, connect diagrams with external data, and develop reusable custom Shapes, Stencils, and Templates.

The course is suitable for users of **Microsoft Visio Plan 2, Visio 2021, 2019, 2016, and 2013 Standard or Professional** editions.

Due to their more limited feature sets, **Visio Plan 1 and Visio for the Web** are not suitable for completing all of the activities covered during this course.

Please note: The external data functionality covered in Module 6 requires Visio Professional or Visio Plan 2.

Prerequisites

Previous advanced experience with Microsoft Visio is not required. However, participants should have:

- A general appreciation of drawing applications and basic design concepts,
- Confidence using a mouse and keyboard,
- The ability to navigate files and folders in Windows,
- Familiarity with basic Windows operations such as opening, closing, minimising, and maximising windows.

For virtual attendance, a dual-monitor setup is recommended.

Who Should Attend

This course is particularly suitable for:

- Users who want to learn Microsoft Visio from the beginning or develop a more structured understanding of the application,
- Professionals who visually model business processes,
- Users responsible for creating Flowcharts and Organisation Charts,
- Team members who produce technical or business diagrams,
- Existing Visio users who want to explore data connectivity and customisation features.

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What You Will Learn

By the end of this course, participants will be able to:

- Navigate Microsoft Visio drawings effectively,
- Customise the Visio working environment,
- Create new diagrams using Templates,
- Create, modify, and connect Shapes,
- Build Organisation Charts and Flowcharts,
- Improve the appearance of diagrams with formatting tools,
- Connect Visio diagrams with external data,
- Exchange and use information with other applications,
- Create and manage Custom Shapes and Stencils.

Outline

Module 1 – Getting Started with Visio

- Exploring the Visio interface
- Navigating the main working environment
- Customising the Ribbon
- Configuring the Quick Access Toolbar
- Working with Backstage Commands

Module 2 – Shape and Drawing Fundamentals

- Selecting an appropriate Template
- Adding Basic Shapes
- Working with Open and Closed Shapes
- Moving, resizing, and manipulating Shapes
- Using Task Panes
- Adding text to Shapes
- Editing and formatting text
- Numbering Shapes
- Connecting Shapes
- Working with and modifying Connection Points

Module 3 – Building Organisation Charts

- Creating an Organisation Chart manually
- Using the Organisation Chart Wizard
- Splitting an Organisation Chart across multiple pages
- Modifying Organisation Chart Layouts
- Organising structures for clearer visual communication

Module 4 – Creating Flowcharts

- Building a Basic Flowchart
- Connecting process steps with Shapes and Connectors
- Creating 3D Workflow Diagrams

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- Building Cross-Functional Flowcharts
- Adding interactivity through Hyperlinks

Module 5 – Formatting Diagrams

- Applying Shape Formatting
- Working with Themes
- Adding a Background
- Creating a custom Style (optional)
- Adding Borders and Titles
- Working with Layers
- Using Layers to manage more complex diagrams

Module 6 – Working with External Data

Some features in this module require Visio Professional or Visio Plan 2.

- Working with PivotDiagrams
- Using Data Graphics
- Linking Shapes to External Data
- Connecting drawings with information from other applications
- Understanding how Visio can work with external application data

Module 7 – Custom Stencils and Shapes

- Introduction to Custom Shapes
- Importing Shapes
- Creating a Custom Shape
- Building a Custom Stencil
- Creating a Custom Template
- Developing reusable Visio components