

Visio - Level 2

Duration: 1 day

Audience: Pour tous

Who is this training for?

Advanced Visio users interested in exploring visual data management features.

Training objectives

- Create custom shapes.
- Manage special items.
- Use layers.
- Understand how Visio is both a drawing tool and a data streaming software.
- Learn how to integrate data into shapes.
- Create datasets that meet specific needs.
- Model several types of diagrams (Flow, Gantt, etc.).
- Learn how to link a database to a diagram.
- Design, using Visio, an interactive information dissemination system in Web format.
- Publish and use a diagram system in HTML format.

Summary

From the simple and effective diagramming software that it was at its origin, Microsoft Visio has become a powerful visual data management tool since the 2007 versions. This course explores how Visio makes it possible to create a diagram attached to data from, for example, an Excel list. This tool, which is as powerful as it is user-friendly, will allow IT equipment managers, for example, to find in one place the layout plans of their equipment as well as the list of relevant information (serial number, version, date of commissioning, make, model, etc.).

Course outline

Create custom shapes

- Modify existing shapes

- Create shapes using drawing tools and constructive geometry operations
- Manage grouped shapes
- Add and edit connection points
- Change the text box attached to shapes

Use special objects

- Containers : Add Container, Format Container, Managing Shapes in a Container
- Callouts
- Adding a Speech Bubble

Working with Layers

- Creating Layers
- Embedding Objects in Layers
- Setting Layer Options

The Concept of Visual Databases

- Defining Application Fields
- Visualizing Data Attached to Shapes
- Entering Data

Customizing Data Fields

- Inserting Data into a Shape
- Adding a Data Field to a Shape
- Creating Datasets
- Applying datasets to shapes

Exporting data - reports

- Working with pre-existing reports
- Modifying pre-existing reports
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Creating custom reports

Linking data to shapes in a diagram

- Concepts and uses of these features
- Knowing usable database formats
- Connecting a data file to a Visio diagram
- Linking data to shapes
- Updating data

Create a data graph

- Apply a data graph to a shape
- Create custom data graphs

Add interactivity to diagrams

- Add a hyperlink to an object
- Use sub-process creation features
- Link diagrams to each other and between pages

Publish diagrams in HTML format

- Save a Visio file in HTML format (Web page)
- Use Visio diagrams published in a web browser

Approach and methodology

- Lectures
- Demonstrations
- Directed exercises

Prerequisites

- For any training in our face-to-face classrooms, it is necessary to have your own computer with the Visio software (desktop version) installed.

- Professional License.
- Good knowledge of one of the Office suite software (e.g. Word, PowerPoint).
- Good knowledge of Visio. It is important to have the desktop application to follow this training.
- Not compatible with Visio on the web.

Recommendations

Have taken the Visio level training or equivalent.