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Your Total Training Resource

Microsoft® Visio®

Microsoft Visio drawing and diagramming software makes it easy for business professionals to visualize, explore, and communicate complex information. Go from complicated text and tables that are hard to understand to Visio diagrams that communicate information at a glance. Instead of static pictures, create data-connected Visio diagrams that display data, are easy to refresh, and dramatically increase your productivity. Use the wide variety of diagrams to understand, act on, and share information about organizational systems, resources, and processes throughout your business. Accomplish more than you ever thought was possible, and communicate more effectively than you ever could with static data alone.

The modules for Visio are as follows:

- [Module 1 – Diagram Drawing and Formatting](#)
- [Module 2 – Templates, Data Graphics and Macros](#)

To Schedule / Need Additional Information

To schedule sessions, receive more information or for questions/clarifications contact us at:

Email: Ken Keller at kkeller@c-kg.com or Dean Carroll at dcarrroll@c-kg.com or

Phone: (630) 495-0505 or (800) 869-7497.

[To see a complete list of our current computer training options click here.](#)

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Module 1 –Diagram Drawing and Formatting

Diagram Setup:

- Understand the Visio program interface including menu, panels and drawing board.
- See how diagram drawings can be created from powerful templates or from scratch.
- Create a diagram using the blank drawing template.
- See where the thousands of shapes can be found to create an almost unlimited number of diagrams.
- Learn how these shapes are organized into groups called stencils.
- Learn how to display any number of stencil sheets to use in your diagram drawings.
- Activate desired show settings that will help with creating your diagram including the ruler, grid, guides and page breaks.

Draw Shapes:

- Display the stencil sheets that contain the shapes you are interested in using.
- Navigate through the stencil sheets that you displayed.
- Activate the dynamic grid setting to help with shape spacing and alignment.
- Drag a desired shape to the drawing board.
- Learn how to select individual shapes.
- Learn how to move and copy (duplicate), resize and delete shapes.
- Rotate, flip and invert any object.
- Use nudging technique to precisely move objects in very small or large increments.
- Insert annotation shapes that stand out from other shapes, that are used to describe other shapes in a diagram.
- Link the callout with the shape it's referencing so that the callout moves with the shape automatically.
- Learn how to bring shapes in from outside the program.
- Import pictures, clipart and graphics from your local or network drives as well as on-line pictures from the internet.

Add Text, Objects and Fields:

- Add text boxes to a diagram.
- Add floating text anywhere on the drawing board without the hassles of text boxes.
- Add embedded objects into your drawing including spreadsheets, presentations, graphs and more.
- Add screen tips (help text) that pop up on the screen when you point the mouse on the item you set with the screen tip feature.
- Add special symbols of any kind, anywhere on the drawing.
- Add fields to the diagram that represent date/time, document info and more.
- Insert hyperlinks that jump to other areas of the diagram, other files types outside of Visio like spreadsheets, documents, pictures and drawings as well as websites.

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Organize Shapes:

- Learn how to select multiple shapes using various keyboard and mouse techniques.
- Align and distribute multiple shapes to save time.
- Use the snap and glue, and the dynamic grid to make it easier to align objects with one another.
- Merge/combine multiple shapes together to create new shapes.
- Group multiple shapes to treat as one object as well as ungroup.
- Re-arrange shapes by moving shapes over and under other shapes.
- Re-position shapes to add spacing between and re-align shapes to line up and evenly distribute.
- Change an existing shape into another shape while maintaining the original formatting.

Various Illustrations:

- Insert AutoCAD drawings as well as a variety of charts including column, bar, line, area, pie and more.
- Add pictures, clipart and on-line pictures and graphics.
- Learn how you format illustrations with a variety of tools to capture that eye-catching appeal.

Shape Containers:

- Create professional-looking containers to house related shapes.
- Add labels and special formatting to the container.
- Choose a specific formatting style for the container.
- Learn how to move, copy and delete the container.
- Change how you want objects spaced within the container by changing the container's margins and by using the "fit to contents" command.
- Set the container to lock contents so nothing can be deleted or changed with it.

Diagram Layering:

- Learn how to use layers to organize related shapes on the drawing page.
- Learn how to categorize shapes using layers.
- Learn how to create layers and then place certain shapes onto each of the layers.
- Learn to use layers to selectively view, print, color and lock different categories of shapes.
- See how to activate, de-activate, rename and delete layers.
- Learn how to control whether you can snap to or glue to shapes on a layer.

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Connecting Shapes:

- Learn how shapes are connected and related using connectors.
- Understand the differences between point connections and dynamic connections.
- Learn how point connections maintain the connection point when moved, whereas dynamic connections move the connection to the closest connection point.
- Activate the connection points feature to see the shape's connection points to connect to.
- Learn how to make connections (link) using these two types of connectors.
- Learn how to automatically connect shapes as they are added by turning on the AutoConnect feature.
- Automatically connect two shapes either by point connect or dynamic connect.
- See how to change a connection from point to dynamic and vice versa.
- Learn how to delete a connection and start over.
- Use the connectors tool to change the appearance of connectors including right angle, straight lines and curved lines.
- Reposition shapes to more efficiently space and align them using present layouts including flowchart, hierarchy, compact tree, radial and circular.
- Use the auto space tool to best re-layout all linked shapes in the diagram.

Add Text – Connectors and Shapes:

- Learn how to add text to both shapes and connectors.
- See how to add text towards the middle of a connection line.
- Learn how to add text to any kind of shape.
- Edit text and remove text.

Formatting Text, Connectors and Shapes:

- Apply text formatting using the font and paragraph tools.
- Change font, size and color.
- Change text alignment both horizontally and vertically.
- Indent text.
- Rotate text that's freeform anywhere in the document, contained in a shape and even on a connection line.
- Change the line formatting of the connection lines.
- Change the thickness, color and dash-effect of connection lines.
- Change the lines from straight to curved, from sharp elbow to arc.
- Add or remove arrow tips on either ends.
- Change formatting of shapes.
- Apply shape styles to shapes that include fill color, font formatting and border formats.
- Apply specific fill or line or effect formatting to any shape.
- Learn to add a vast assortment of special effects to your connectors and shapes including shadows, reflections, glow, 3D rotation and more.

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Inking Tools:

- Learn to use the ink tools feature to write, draw, color and highlight on areas of your diagram.
- Learn how tablet or touchscreen users can write text with their finger and convert it to typed text or a graphic shape (artsy).
- See how any type of user can use the pen tool and highlighter tool to free-write text and highlight areas.

Theme Formatting:

- Learn how you can apply a set of coloring and effects by applying one of many themes that come standard with Visio.
- Learn how to apply a theme and variant to your entire diagram drawing.
- See how to create custom themes based optionally on an existing theme.
- Learn about and how to apply a range of sub-themes.
- Learn how to duplicate a theme or copy it to another diagram.
- See how to keep themes from effecting a shape, how to remove a theme from a specific shape as well as deleting a custom theme.

Create New Stencils:

- Learn how to create your own custom stencils that can be used anytime a diagram is created.
- Create a new stencil sheet file and name it.
- Know how to go from edit mode to use mode.
- Change the name of your stencil sheet if desired.
- Add shapes to the stencil from other stencil sheets or from your current diagram.
- Name each shape in the stencil.
- Copy and delete shapes from the stencil.
- Insert shapes from your custom stencil into your drawing.
- Learn how to open and close stencils and how to find them when they seem to be lost.
- Send any stencil to someone using e-mail or copy the stencil file to a portable device.

Comments:

- Learn how to add comments to enhance information or to make special notations throughout the diagram drawing.
- Use the comments pane to display a listing of all inserted comments.
- Learn to navigate or quickly jump from one comment to another.
- Learn how to edit and delete comments.

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Paging Features:

- Learn about the new page feature that allows you to create a series of diagrams and navigate them like slides in a presentation.
- Activate the auto size feature to automatically extend into multiple pages as your diagram drawing grows in size.
- Change the page size and orientation to landscape or portrait.
- Understanding the background and borders and titles features and how they work as one.
- Learn how to apply preset backgrounds and/or preset borders and titles to some or all diagram pages.
- Learn how to customize these areas as well.
- Learn how to create your own background images and coloring as well as borders and titles.
- Insert Visio fields in the drawing's background including date and time, document info, page numbering and more.

Proofing and Language Tools:

- Check your spelling automatically and manually with the spelling feature.
- Find new words or phrases for selected text using the thesaurus feature.
- Translate selected text into one of dozens of foreign languages.

Presenting and Printing:

- Display your diagram, page-by-page, without toolbars and other screen elements displayed by viewing in presentation mode.
- Convert the diagram into PDF file format for easy sharing with those without the Visio program.
- Print the diagram in color, grayscale or black and white.

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Module 2 – Templates, Data Graphics and Macros

Templates – General, Flowchart and Business:

- Use the built-in Visio templates that will put you on the FastTrack to creating general diagrams.
- Here we will use templates to create a basic diagram, block diagram and block diagram with perspective.
- Use the built-in Visio templates that will put you on the FastTrack to creating powerful flowchart-related diagrams.
- Here we will use templates to create a basic flowchart, BPMN diagram, cross-functional flowchart, IDEFO diagram, SDL diagram and work flow diagrams.
- Use the built-in Visio templates that will put you on the FastTrack to creating powerful business-related diagrams.
- Here we will use templates to create an audit diagram, brainstorming diagram, cause and effect diagram, charts and graphs, EPC diagram, fault tree analysis diagram, ITIL diagram, marketing charts and diagrams, organizational chart diagram, pivot diagram, six sigma diagram, TQM diagram and value stream diagram.

Templates – Schedule, Maps and Floorplan:

- Use the built-in Visio templates that will put you on the FastTrack to creating schedule diagrams.
- Here we will use templates to create a calendar, Gantt chart, PERT chart and timeline.
- Use the built-in Visio templates that will put you on the FastTrack to creating maps and floor plans.
- Here we will use templates to create directional maps, electrical and telecom plan, floor plan, home plan, HVAC control logic diagram, HVAC plan, office layout, plant layout, plumbing and piping plan, reflected ceiling plan, security and access plan, site plan and space plan.

Templates – Optionally Covered for Engineering, Network, Software and Database:

- Use the built-in Visio templates that will put you on the FastTrack to creating powerful engineering-related diagrams.
- Here we will use templates to create a basic electrical diagram, circuits and logic diagram, fluid power diagram, industrial control systems diagram, part and assembly diagram, piping and instrumentation diagram, process flow diagram and systems diagram.
- Use the built-in Visio templates that will put you on the FastTrack to creating network diagrams.
- Here we will use templates to create active directory, basic networks, detailed networks, LDAP directory and rack diagram.
- Use the built-in Visio templates that will put you on the FastTrack to creating software and database diagrams.
- Here we will use templates to create Chen's database notation, COM and OLE, conceptual website, crow's foot database notation, data flow diagram, data flow model diagram, enterprise application, IDEF1X database notation, program structure, UML activity, UML class, UML database notation, UML sequence, UML state machine, UML use case, website map, wireframe diagram.

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Database Shape Records:

- Understand what a database is and the role of records and fields.
- Learn how to turn your diagram drawing into a database with each shape representing a single record with any number of contained fields.
- Learn how to convert each of the diagram's shapes into database records.
- Add the fields that will contain data in each shape(record).
- Specify the type of data for each field to hold including text, number, dates, currency and more.
- Go to each shape and enter the data for each of the fields for that shape.
- Learn how to add data shapes to a stencil to use over and over again.

Import Database Shape Records:

- Learn how you can use data from outside data sources as the basis for your data shapes.
- Learn how to import data from outside sources including Microsoft Excel, Microsoft Access and others.
- Learn how to select the data file that you want to import the data from.
- Use the drag technique to drag a record to the drawing to create a data shape.
- Convert an existing shape into a data shape by setting the shapes link tool.
- Learn how to unlink record data from the data shape.
- Learn how to re-establish the link.
- Learn how to refresh the linked data when the outside data source changes.

Data Graphics:

- Learn about using data graphics to display information about the data contained within a shape.
- Understand how to transform a diagram into a visual database where shapes become records that can contain any number of fields.
- Learn what exactly a data graphic is.
- Learn how to create a new data graphic or convert an existing shape into a data graphic.
- Learn how to add an icon set to a shape.
- Add a text graphic to a shape.
- Add a data bar to a shape.
- Add a fill color by data value.
- Change an existing data graphic.
- Remove a data graphic from a shape.
- Learn how to add a legend from a list of legend styles as well as creating your own.

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Create Shape Data Reports:

- Learn how you can run a report that lists the text or data that is associated (contained within) with each of the data shapes of your diagram (database).
- See the dozens of report templates that you can use for your data reports.
- Learn how you can customize any report by adding, removing and modifying fields to your needs.
- Learn how to create new reports from scratch.
- Select the type of format you want for your report including Excel spreadsheet, HTML web page, XML and as a Visio shape (very cool).
- Learn how to refresh or update the report when data shapes are added or removed from the diagram, or when data changes.

Recording Macros and VBA:

- Learn how macros can automate what you do most in a drawing diagram.
- Learn how to create macros to automate repetitive tasks using the macro recorder and by inserting VBA code.
- Learn how to record macros in stages.
- Share macros between drawings.
- Set up keyboard shortcuts, quick access toolbar icons and tab ribbon icons, to run your macros quickly.
- Learn to create macros from scratch by inserting VBA that provides custom functionality to enhance Visio's performance and efficiency.
- Add code to macros and create, export and delete code modules.
- Create macros that add additional tools and features not found normally in the program.
- Learn how to edit/expand your macros to make them do more and work faster.
- Learn about macro security and how to protect your computer.
- Learn how to join and combine macros along with streamlining them.