Audit Diagram Template

You can create an audit diagram by dropping shapes from the Audit Diagram Template on the page or by using data from a text (.txt) or Microsoft Excel (.xls) data file.

Starting an audit diagram

To create an audit diagram by dropping shapes on the drawing page, open the Audit Diagram Template in the Flowchart folder.

To create an audit diagram from a data file, run the Flowchart-TQM Diagram Wizard. The wizard requires the data file to include specific column headings, so you may find it most efficient to create your data file from one of the data-file templates available in the wizard.

Note: To fill in data in the data file templates, you need to know the name of the Visio stencil with the shapes you want to use and the name of each master you want to use. You also need to supply a Shape ID, which is a name, such as MyShape1, that uniquely identifies a shape.

To run the Flowchart-TQM Diagram Wizard and open a data file template:

1. Choose Tools > Flowchart-TQM Diagram Wizard. On the first wizard screen, click Next.

2. On the second wizard screen, choose Enter Data In A New Text File or Enter Data In A New Microsoft Excel Workbook, then click Next.

3. On the third wizard screen, choose Use Visio Flowchart-Basic Template, then click Next.

4. If you chose to open a new text file, the wizard prompts you to name the file. When you click Next, a text file opens that includes instructions for setting up column headings.

   If you chose to open a new Microsoft Excel Workbook, the wizard provides information about moving between Excel and Visio. When you click Next, a workbook opens with the column headings in place.

5. Enter data in the text file or workbook template, then save the file.

6. Choose Tools > Flowchart-TQM Diagram Wizard. When the wizard prompts you for the data file, choose the text or Excel file you just created. Follow the wizard screens.

To see a Shape ID:

• Select the shape, then choose Format > Special.

   In the Special dialog box, the Shape ID appears under Name.

Audit diagrams and layers

When you create an audit diagram, Visio places the two-dimensional audit shapes on a layer called Flowchart. A layer is a named category of shapes. When shapes are assigned to separate layers, you can work with them separately. For example, you can hide or lock all layers except the one you want to work on, or print shapes based on their layer assignments.

See also:
About layers

Connecting audit shapes

The most efficient way to connect audit shapes is to use the connector tool on the Standard toolbar.

To draw an audit diagram using the connector tool:

1. From the Standard toolbar, choose the connector tool.

2. Drag and drop a two-dimensional (2-D) shape from the Audit stencil.

   2-D shapes are indicated by a gray background on the stencil. Examples include Tagged Process or Manual File.

3. With the first 2-D shape selected, drag and drop a second 2-D shape. Visio connects the shapes using dynamic glue.

4. Drag and drop enough shapes to build the complete flowchart. Visio connects each new shape you drop to the selected shape.

See also:
About creating and revising connected drawings

Fitting an audit diagram on a page

In Visio, you can draw an audit diagram first, letting shapes fall in the area outside the drawing page, and then adjust the fit of the diagram and the drawing page.

To fit the drawing page to the audit diagram:

1. Choose File > Page Setup.

2. On the Page Size tab, under Page Size, check Size Page To Fit Drawing, then click OK. The drawing page resizes to enclose the diagram. Even though the shapes may touch the edges of the drawing page, they still print within the edges of the printed page.

To fit the audit diagram to the drawing page:

1. Choose File > Page Setup.

2. On the Drawing Scale tab, under Drawing Scale, choose a smaller drawing scale.

   For example, if the drawing is larger than the drawing page, change the scale so that .75 units on the page equals 1 unit in the real world.

Tip: When you scale an audit diagram, the text doesn't scale with the shapes. You may need to change the font size so that the text fits properly within the flowchart shapes. To change the font size, double-click a shape to select its text, then choose the size you want from the font size list on the Text toolbar.

Audit shape properties

By default, Visio associates three custom-property fields-Cost, Duration, and Resources-with every 2-D audit shape. You can enter data into these fields by right-clicking any shape, then choosing Properties from the shortcut menu.

To associate additional data with your audit shapes, you can run the Custom Properties Editor to add custom-property fields.

To run the Custom Properties Editor:

- Choose Tools > Macro > Custom Properties Editor.

See also:
Adding, editing, and deleting custom-property fields

Generating reports from properties

If you've entered data for the property fields associated with your audit shapes, you can run the Property Reporting Wizard to generate inventory or numerical reports based on the data. For example, you could calculate the average cost for a particular process, or create a cost and duration summary for all the steps in a chart.

To run the Property Reporting Wizard:

- Choose Tools > Property Report.

See also:
Creating reports from custom data

Linking audit shapes to other drawing pages, other files, or World Wide Web locations

You can add navigational links to any shape in your diagram, so that users of the diagram can right-click the shape to jump to separate drawing pages, separate files, or documents on an intranet or the Web. For example, you can link a tagged process shape to a Microsoft Word document that describes the process in detail.

To add links to shapes:

- Choose Insert > Hyperlink.

See also:
Adding, modifying, and deleting hyperlinks

Creating a database from an audit diagram

If the shapes in your diagram contain custom-property data, you can run the Flowchart Database Wizard to create a Microsoft Access 7.0 database from the diagram. You can create a new database or insert new tables into an existing database. To run the Flowchart Database Wizard, you must have Microsoft Access 7.0 installed on your computer.

To run the Flowchart Database Wizard:

- Choose Tools > Flowchart Database Wizard.

See also:
Creating databases from shape properties