Flowchart - Basic Template

Starting a flowchart

There are two ways to create a flowchart. You can either open the Flowchart - Basic Template or you can run the Flowchart - TQM Diagram Wizard.

Open the Flowchart - Basic Template when you want to draw a flowchart by dropping shapes on the drawing page.

Run the Flowchart - TQM Diagram Wizard when you want to

- Draw a Cause and Effect (Fishbone), Top Down, or Cross Functional flowchart or a Force Field diagram.

- Create a flowchart from a text (.txt) or Microsoft Excel (.xls) data file. 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 that become available when you run the wizard.

To run the Flowchart - TQM Diagram Wizard to create a Cause and Effect, Top Down, Cross Functional, or Force Field diagram:

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

2. On the second wizard screen, choose No Data, then click Next.

3. On the third wizard screen, choose the type of diagram you want to create, then click Next. Follow the wizard screens.

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

1. Choose Tools > Macro > Flowchart > 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 Template, then click Next.

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

   If you chose to open a new Microsoft Excel Workbook, the wizard gives you some information about moving between Excel and Visio. When you click Next, a workbook opens with the column headings already 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 asks you for the data file you want to use, choose the text or Excel file you just created. Follow the wizard screens.

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 see a Shape ID:

- Select the shape, then choose Format > Special. In the Special dialog box, the Shape ID appears under Name.

Flowcharts and layers

When you create a flowchart, Visio places the flowchart shapes on a layer. 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 you can print shapes based on their layer assignments.

See also:
About layers

Connecting flowchart shapes

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

To draw a flowchart 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 Flowchart or Flowchart (Additional) stencil.

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

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. Each new shape you drop connects to the selected shape.

See also:
About creating and revising connected drawings

Fitting a flowchart on a page

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

To fit the drawing page to the flowchart:

1. Draw a flowchart and connect the shapes. 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 flowchart. Even though the shapes may touch the edges of the drawing page, they print within the edges of the printed page.

To fit the flowchart to the drawing page:

1. Draw a flowchart and connect the shapes. Choose File > Page Setup.

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

   For example, if the unscaled drawing is larger than the drawing page, change the scale so that .75 units on the page equals 1 unit in the real world. If the drawing is still too large, try different scales until the diagram fits on the page.

Tip: When you scale a flowchart, the text doesn't scale with the shapes. You may need to change font size so that the text fits properly within the flowchart shapes. To change 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.

Flowchart shape properties

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

If you want to associate additional data with your flowchart shapes, you can run the Custom Properties Editor to add properties.

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 properties associated with your flowchart 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 you could create a cost and duration summary for all the steps in the chart.

To run the Property Reporting Wizard:

• Choose Tools > Property Report.

See also:
Creating reports from custom data

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

You can add navigational links to any shape in your drawing, so that users of the drawing 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 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 a flowchart

If the shapes in your drawing contain custom property data, you can run the Flowchart Database Wizard to create a Microsoft Access 7.0 database from the drawing. 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-TQM Diagram Wizard.

  If the command does not appear on the Tools menu, choose Tools > Macro > Flowchart > Flowchart-TQM Wizard.

See also:
Creating databases from shape properties