Work Flow Diagram Template

There are two ways to create a work flow diagram. You can either open the Work Flow Diagram Template or you can run the Flowchart-TQM Diagram Wizard.

Starting a work flow diagram

Open the Work Flow Diagram Template to draw an work flow diagram by dropping shapes on the drawing page.

Run the Flowchart-TQM Diagram Wizard to create a work flow diagram 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.

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 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 provides some 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 you want to use, 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.

Work flow diagrams and layers

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

See also:
About layers

Connecting flowchart shapes

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

To draw a work flow diagram using the connector tool:

1. Choose the connector tool from the Standard toolbar.

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

   2-Dshapes are indicated by a gray background on the stencil. Examples include Accounting or Inventory.

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 work flow diagram on a page

You can draw a work flow diagram first, letting shapes fall outside the drawing page, and then adjust the fit of the diagram and the drawing page.

To fit the drawing page to the work flow 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 work flow 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 work flow 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 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 work flow diagram, 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.

Work flow shape properties

By default, Visio associates three property fields, Cost, Duration, and Resources, with every 2-D work flow 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 work flow shapes, you can run the Custom Properties Editor to add 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 properties associated with your work flow 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 work flow 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 Board of Directors shape to a Microsoft Word document that lists the board's members' names and affiliations.

To add links to shapes:

- Choose Insert > Hyperlink.

See also:
Adding, modifying, and deleting hyperlinks

Creating a database from a work flow diagram

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 Database Wizard.