

How to Create Flowcharts with SmartDraw

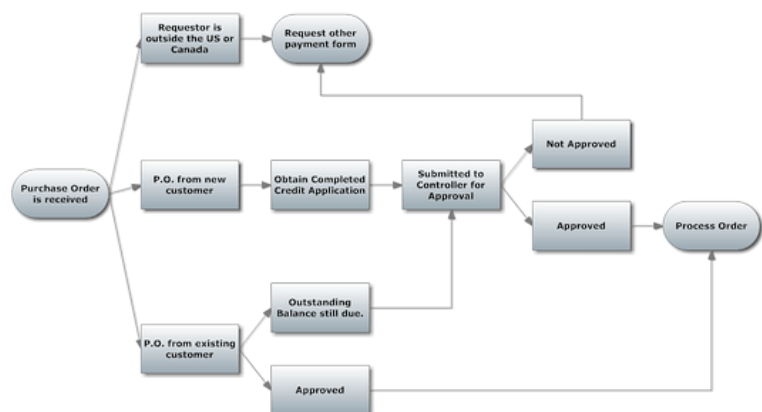
Businesses lose large sums of money each year as a result of simple operational inefficiencies. Many managers never take notice of a minor inefficiency until it's mushroomed into a major financial sinkhole. Most of these inefficiencies have a common root cause: lack of process.

A business process is the method that an employee follows to perform some work-related task. If a business process isn't taught by management or senior members of the organization, then employees invent their own processes to do their work. Most managers don't take the time to properly determine what the most efficient processes are. And even if they do know the best way to get things done, they often don't take the time to communicate these processes to those who need them most.

The problem that this lack of business analysis and communication causes isn't apparent in very small organizations, but as more and more people join the organization, the potential for miscommunication, inconsistency and inefficiency increases exponentially.

Luckily, there's an easy way to document a business process by creating a flowchart.

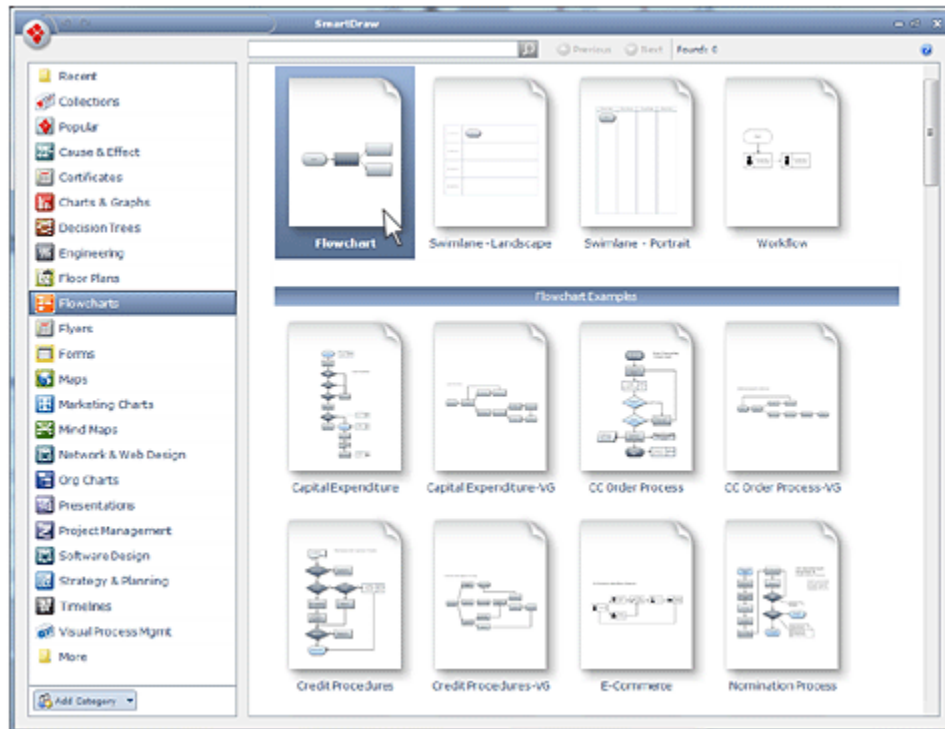
Purchase Order Approval Process



Let's see how quick and easy it is to create a professional looking flowchart in SmartDraw.

Getting Started

To begin, start by selecting the flowchart template by clicking its icon on the home panel.



Add Text

Let's create an order process chart, as an example. Click in the rounded box which is the starting point in any SmartDraw flowchart template and type whatever you want your first step to be.

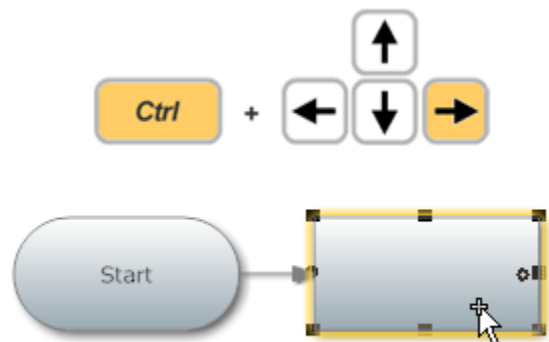


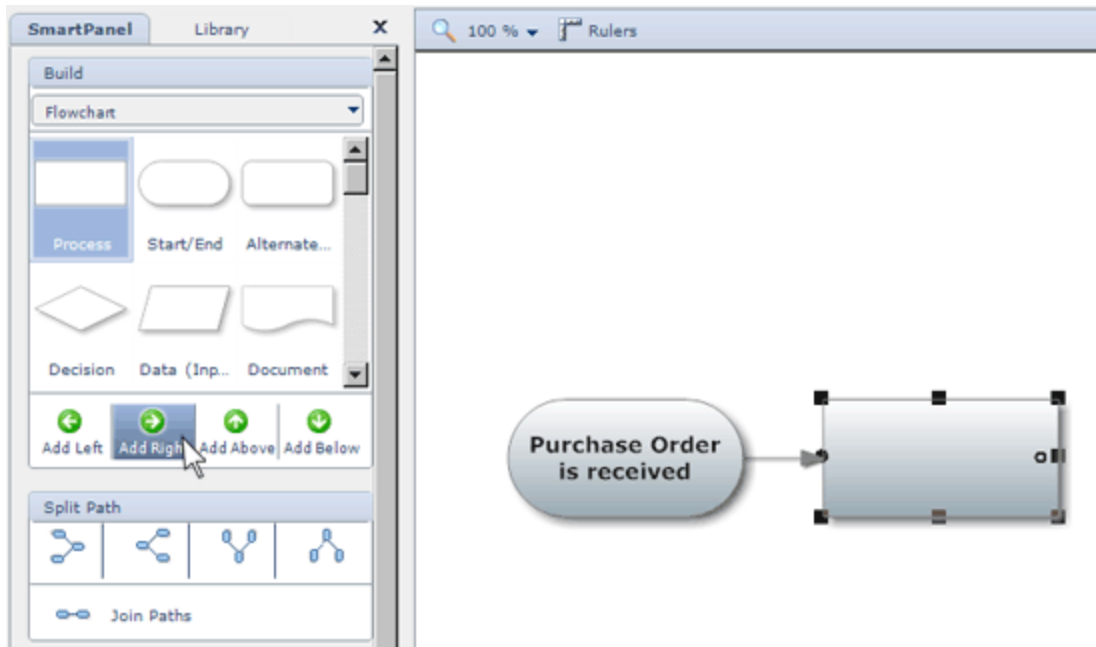
Add Shapes Using the SmartPanel and Keyboard Shortcuts

Every SmartDraw template has a SmartPanel docked to the left of the work area. This SmartPanel contains all the tools and shortcuts you'll need to build a specific diagram.

In this case, you can use the SmartPanel to add new steps to your process, create split paths, adjust spacing, and more.

To add a step, click on the **Add Right** button in the SmartPanel. Repeat as needed. You can also hold down the [CTRL] key and hit the right arrow key to achieve the same effect.





Add a Split Path or Decision

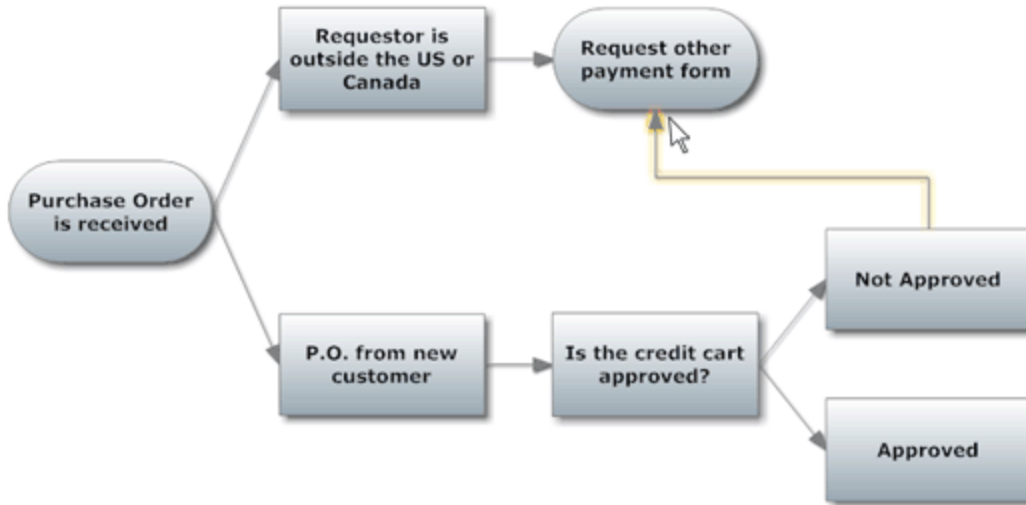
To indicate a decision point in the chart such as: “Has the credit card been verified or not?”, you’ll need to split the path of your chart to show two possible outcomes depending on the circumstances. Do this by clicking one of the options under split path in the SmartPanel.



Adding a split path will allow you to continue going left to right and make your flowchart easier to read. If the split path is a yes/no decision, you may want to make this clear by typing YES and NO in the lines of the split path. To do this, simply double-click on the line and type.

Returning to a Previous Step

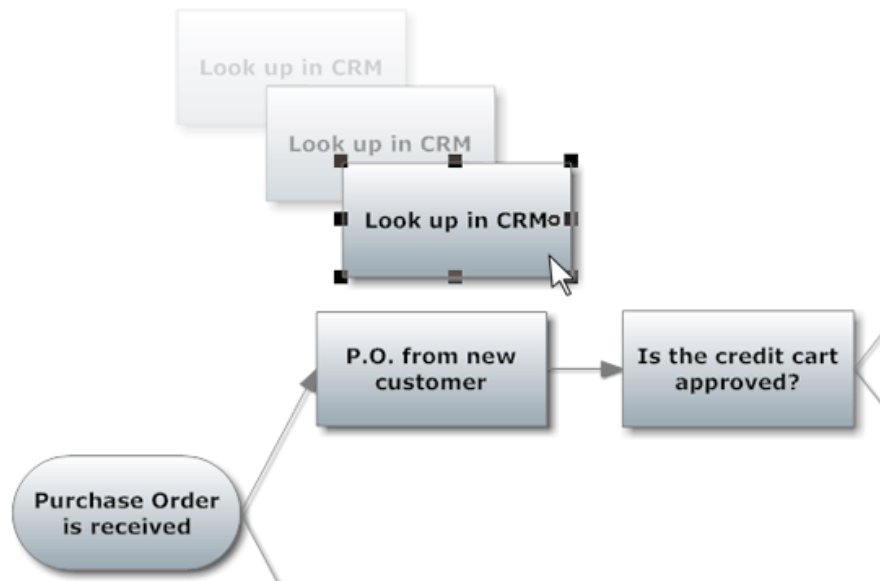
If you get to a point in the process that you can go no further and you need to return to an earlier step, you can do this by drawing a line to one of the previous boxes. Just click on the Line button in the ribbon above your work area, select the box you want to start from and then select the box you want the line to point to. The connecting line is placed in and formatted perfectly.



Rearranging and Deleting Steps

To remove a step select it and hit the delete key – just like you’d remove text in a word processor. Removing the shape makes your chart reflow – just like deleting in a word processor causes your text to reflow.

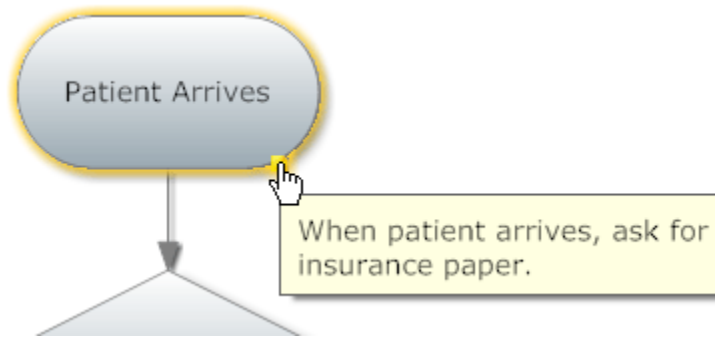
Use the mouse to move shapes around and SmartDraw will adjust your process chart automatically. To move a step, select it and without letting go of the mouse move it to any location you desire. As you move the shape, you’ll notice SmartDraw’s automatic connector will attempt to grab it. SmartDraw shows you a dashed outline of where your step will be if you let go of your mouse. To drop a shape into place, simply let go of your mouse.



That's how a visual processor works. No more lining shapes up manually and hooking them up with lines manually.

Adding Notes

Put details about your visual in notes instead of on your diagram for a cleaner and simpler look.



Add notes to any shape and see them pop up as you mouse over. Perfect for collaboration.

Adding the Last Step

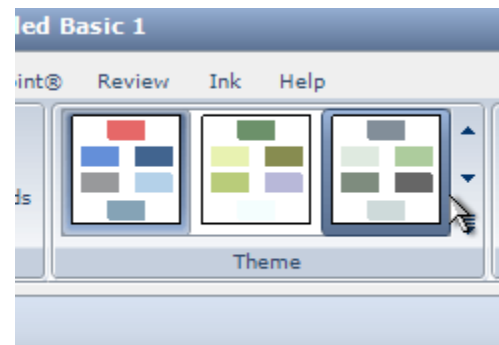
Once you get to the final step in a process, select the Start/End symbol from the SmartPanel and add it to the right. The first and last steps in the process are clearly distinguished from the other steps and the final flowchart is clean-looking and easy to read.

Changing the Style of Your Flowchart

SmartDraw automatically applies professional design themes for you, but also gives you complete control to customize your process chart in any way you want.

Change the entire look of your chart by applying a new design theme with just one click.

Or change the look of individual shapes instantly by selecting a new Quick Style. Choose from more than 40 preset looks.



Share Your Flowchart with Others

If you want to share your process chart with others, you can do so with a single click. You can send any SmartDraw visual to PowerPoint, Word, Excel, or Outlook using the buttons at the top of your work area.



Creating a process chart has never been easier or more effective and nothing makes a great looking flowchart like SmartDraw, the world's first visual processor.

Keyboard Shortcuts

Create your entire chart without taking your hands off the keyboard with quick and easy keyboard controls.

To add a shape to a flowchart, simply hold down the [Ctrl] key and use the up, down, left or right arrow key.

To create a split path after a decision step, use the [Ctrl] and right arrow key to add the first step and then simply hit the [Enter] key to add the second choice to your process.

Here are some other keyboard shortcuts you may find useful:

Keyboard Shortcuts	
Ctrl +	Zoom In
Ctrl -	Zoom Out
Ctrl + Arrow key	Add shape in up/down/left/right (charts with auto-connectors only)
Enter	Adds a new peer shape alongside the selected shape. (charts with auto-connectors only)
Shift + Enter	Adds a new shape subordinate to the selected shape. (Mind Maps and Org Charts only)
Ctrl+ Enter	Adds a new peer shape alongside selected shape when in text entry mode.
Insert	Creates a new visual starting with the selected shape and adds hyperlinks between the two visuals
Shift + Ctrl	Zoom in (stops at 800%)
Shift + Ctrl + G	Ungroup
F3	Find Next (Find and Replace dialog)
Alt+F4	Exit / Close SmartDraw
Delete	Clear / Delete selected object
Ctrl+A	Select All
Ctrl+B	Bold Text
Ctrl+C	Copy
Ctrl+D	Duplicate
Ctrl+F	Find
Ctrl+G	Group
Ctrl+H	Replace
Ctrl+I	Italicize Text
Ctrl+K	Insert Hyperlink
Ctrl+M	Executes Text Entry Mode (only if shape or line is selected)
Ctrl+N	New Document
Ctrl+O	Open Document
Ctrl+P	Print
Ctrl+Q	Save changes and exit / close SmartDraw
Ctrl+S	Save
Ctrl+T	Opens Font Dialog
Ctrl+U	Underline Text
Ctrl+V	Paste
Ctrl+W	Save changes and exit to template selection screen

Ctrl+X	Cut
Ctrl+Y	Redo
Ctrl+Z	Undo