

iGrafX FlowCharter 2000 Professional User's Guide

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Using Toolbars and Tool Palettes

FlowCharter 2000 Professional uses toolbars and tool palettes to provide much of its functionality. Toolbars contain icons that provide a set of related tools. For example, the Formatting toolbar contains tools for formatting elements of the diagram or model. With Tool palettes, you can select from a palette of styles or colors. For example, there is an Arrowheads tool palette for selecting the direction of an arrow or style of an arrowhead. There are color palettes for text, lines, and fills.

You can display the following toolbars:

- Standard
- Formatting
- Toolbox
- Draw
- Preset Styles
- Custom Data
- iDiagram
- Visual Basic
- Connector Line Tool
- Zoom
- Controls
- Arrange
- Model

- Trace



Note

The Trace toolbar is available only if you install iGrafx Process 2000.

Standard Toolbar

The Standard toolbar contains tools that help you perform basic functions in FlowCharter 2000 Professional. Most of these functions appear as commands in the File and Edit menus.

Tool	Command	Description
	New	Creates a new diagram.
	Open	Opens a previously existing diagram.
	Save	Saves the active diagram.
	Print	Prints the active diagram.
	Print Preview	Shows the diagram as it looks when you print it.
	Spelling	Checks the spelling of text in your diagram.
	Cut	Removes the selected item and places it on the Clipboard.

	Copy	Copies the selected item and places it on the Clipboard.
	Paste	Places the contents of the Clipboard on the diagram.
	Format Painter	Copies the formatting of the selected text, shapes, or lines to other text, shapes, or lines.
	Undo	Undoes an action or change.
	Redo	Reverses the last undo you made.
	View Shape Palettes	Shows or hides the Shape palette.
	Draw	Opens the Draw Toolbar.
	Properties	Opens the Properties dialog box.
	Zoom Control	Magnifies the diagram by the percentage you select or enter.
	Help	Opens the FlowCharter 2000 Professional HTML Help system.

Formatting Toolbar

The Formatting toolbar gives you easy access to the options you use to define the way text, lines, and shapes look in your diagrams. Additional formatting options are available on the Format menu.

Tool	Command	Description
	Font Name	Displays and changes the name of the current font.
	Font Size	Shows the current point size.
	Bold	Turns text bold (or removes bold, if it is already bold).
	Italic	Turns text italic (or removes italic, if it is already italic).
	Underline	Underlines text (or removes underline, if it is already underlined).
	Opaque	Makes the text's background opaque.
	Text Color	Applies color to text.
	Vertical Align	Specifies Top, Middle, or Bottom alignment. Click the tool and then choose from the menu.
	Horizontal Align	Specifies Left, Center, or Right alignment. Click the tool and then choose from the menu.

	Insert Field	Inserts a new field into a shape.
	Bullets	Makes selected text a bulleted list.
	Decrease Indent	Moves paragraph to the left.
	Increase Indent	Moves paragraph to the right.
	Increase Line Spacing	Increases line spacing in selected text.
	Decrease Line Spacing	Decreases line spacing in selected text.
	Rotate Text Left	Rotates text 90 degrees to the left.
	Rotate Text Right	Rotates text 90 degrees to the right.



—Tips—

You also can use the commands on the Format menu to specify formats, text color, fill color, line color, line styles, line weight, styles for filled lines, arrowhead styles, crossover styles, shadows, and 3D effects.

There are also shortcut keys for vertically aligning shapes: Top (CTRL+SHIFT+4), Middle (CTRL+SHIFT+6), Bottom (CTRL+SHIFT+8).

There are also shortcut keys for horizontally aligning shapes: Left (CTRL+SHIFT+3), Center (CTRL+SHIFT+5), Right (CTRL+SHIFT+7).

When you click the down arrow next to a color tool, a palette of colors opens. If you click a color, the program applies it to the next shape or currently selected shapes. To set a custom color, click More Colors, and the Color dialog box opens.

Toolbox Toolbar

The Toolbox toolbar gives you easy access to the tools you use most to create and change diagrams.

Tool	Command	Description
	Selector	Selects, moves, and resizes drawn elements.
	Insert Department	Adds, edits, or deletes department attributes.
	Shapes	Places shapes in a diagram and selects shape attributes and properties. Click the arrow under the shape to select more shapes from the Shape Library. You can use different shapes to represent steps, documents, events, and other information in diagrams.
	Connector Line	Connects shapes with different types of lines. Choose from Direct, Right Angle, Curved, Org Chart, Cause and Effect, and Lightning Bolt lines.
	Text	Enters and changes text, types text blocks, types text on lines, and changes text. (It is not necessary to select the Text tool to add text to a selected shape.)

	Shape Numbering	Numbers shapes.
	Zoom Control	Changes the view percentage.

Draw Toolbar

The Draw toolbar contains tools that align, flip, rotate, reorder, replace, and otherwise arrange objects. Objects include shapes, text, and lines. You cannot perform all operations on all types of objects. For example, you can only rotate or flip shapes.

Tool	Command	Description
	Draw	Draws shapes in a diagram.
	Selector	Selects, moves, and resizes drawn elements.
	Rotate	Rotates selected objects.
	Reshape	Edits the connect points in the graphic.
	Rotate Right	Rotates the selected objects 90 degrees to the right.
	Rotate Left	Rotates the selected objects 90 degrees to the left.
	Flip Horizontal	Flips the selected objects horizontally.

	Flip Vertical	Flips the selected objects vertically.
	Arrange	<p>Opens a list of Arrange commands for modifying objects in the diagram. The Arrange commands are:</p> <ul style="list-style-type: none"> • Align - aligns shapes vertically and horizontally. • Make Same Size - makes selected shapes same size. • Even Spacing - spaces selected shapes evenly. • Order - moves objects in your diagram. • Group - groups selected objects. • Ungroup - ungroups selected grouped object.

	<p>Combine</p>	<p>Opens a list of Combine commands so you can connect and disconnect closed and open objects. You can also form shapes from different combinations of operations. The Combine commands are:</p> <ul style="list-style-type: none"> • Connect Open - connects the selected, closed objects. • Connect Closed - connects the selected open objects and closes them. • Disconnect - disconnects the selected connected objects. • Join - creates a new shape by joining the selected objects together. • Intersect - creates a new shape from the intersection of the selected shapes. • Outline - creates a new shape from the outline of the selected shapes. • Slice - slices the selected closed shape with the selected open shape.
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	<p>Layer Manager</p>	<p>Opens the Layer Manager. In Layer Manager, you can change the visible, print, and lock properties of layers. Also, Layer Manager selects the current layer; adds, deletes, and renames layers; changes the order of layers; and specifies whether you want to change the current or all layers.</p>
	<p>Fill Color</p>	<p>Specifies the color for a shape.</p>
	<p>Line Color</p>	<p>Applies color to lines, line endings, and shape borders.</p>
	<p>Text Color</p>	<p>Applies color to text.</p>
	<p>Line Style</p>	<p>Changes the style (solid, dashed, dotted) for lines and shape borders. You can select from several line styles, such as solid and dotted, which are also used to define the border styles for shapes.</p>
	<p>Line Weight</p>	<p>Determines line weight, or thickness. Click the tool and then use the arrows to adjust the weight. It is also used to set the border weight for shapes.</p>

	<p>Arrowheads</p>	<p>Sets the arrowhead styles for the selected line. When you click the tool, a list of the most commonly used arrowheads opens. For a wider selection of arrowhead styles, click More at the bottom of the list.</p> <p>You cannot change arrowhead styles on filled lines.</p>
	<p>Crossovers</p>	<p>Changes the crossover style for the currently selected line. To change the crossover style for the entire diagram, use the Connector Line command on the Format menu.</p>
	<p>Shadow</p>	<p>Places a drop shadow on the current shape.</p>
	<p>3D</p>	<p>Gives the shape a 3-dimensional appearance.</p>

Preset Styles Toolbar

The Preset Styles toolbar stores and accesses the styles that you use most frequently for text, shapes, and lines.

Tool	Command	Description
	Shape Style box	Shows the current styles for shapes, including the border and shadow style and width, fill pattern, and color. The styles are applied to the next shape you place in your diagram.
	Add Shape Style tool	Adds the current shape style to the Shape Style list.
	Edit Shape Styles tool	Renames or removes the selected item from the Shape Style list.
	Line Style box	Shows the current styles for lines, including the line and arrow styles, widths, and colors. The styles are applied to the next line you draw.
	Add Line Style tool	Adds the current line style to the Line Style list.
	Edit Line Styles tool	Renames or removes the selected item from the Line Style list.

	Text Style box	Shows the current styles for text, including the font, size, style, and color. The styles are applied to the next character you type.
	Add Text Style tool	Adds the current text style to the Text Style box.
	Edit Text Styles tool	Renames or removes the selected item from the Text Style list.

iDiagram Toolbar

The iDiagram toolbar contains tools that help you set up and run iDiagrams.

Tool	Command	Description
	Insert Entity	Inserts an entity into the selected shape.
	Entity Manager	Shows or hides the Entity Manager.
	Execute	Runs the diagram.
	Stop	Stops the execution of an iDiagram.
	Pause/Resume	Pauses or resumes the execution of an iDiagram.
	Step	Runs the diagram one step at a time.

Visual Basic Toolbar

Use the Visual Basic toolbar to add or edit Visual Basic properties and code to FlowCharter 2000 Professional shapes.

Tool	Command	Description
	Visual Basic Editor	Displays the Visual Basic Editor.
	Design/Run Mode	Switches between the Design and the Run modes.
	Properties	Displays properties for the selected object.
	Edit Code	Edits the code for the object.
	Code Assistant	Adds code to the object.
	Controls	Displays controls options.

Model Toolbar

The Model toolbar contains all the tools needed for modeling functions. Most of the tools on this toolbar also appear as commands in the Model menu. Use these tools with iGrafX Process 2000.

Tool	Command	Description
	Start/Resume	Starts or resumes the model simulation.
	Pause	Pauses the model simulation.
	Stop	Stops running the model simulation.
	Trace	Traces execution of the simulation.
	Run Setup	Modifies run setup data.
	Generators	Modifies generator attributes.
	Resources	Creates or modifies resources used for the simulation.
	Schedules	Creates or modifies schedules used for the simulation.
	Events	Creates or modifies events used for the simulation.
	Attributes	Creates, modifies, or initializes attributes used for the simulation.
	Functions	Creates or modifies functions used for the simulation.

	Monitors	Creates, modifies, or finds monitors used for the simulation.
	Components	Opens the Components dialog box for adding and modifying components.
	View Scenario	Displays the current scenario.
	View Report	Displays the report of the current scenario.

To create a new toolbar

- 1 On the **View** menu, click **Toolbars**.
- 2 Click **New**.
- 3 Type a name for the new toolbar, and click **OK**.
- 4 Drag the tools you want from the **Customize** dialog box to your new toolbar.



—Tips—

You can open the Tools menu and click Customize. With the Customize dialog box open, press CTRL, drag a tool from a toolbar and drop it into empty space to create a new toolbar.

To rename a toolbar

- 1 On the **View** menu, click **Toolbars**.
- 2 Click the toolbar you want to rename.
- 3 Click **Rename**.
- 4 Type a new name for the toolbar.



—Note —

You cannot rename an FlowCharter 2000 Professional toolbar. You can rename only the toolbars that you create.

To reset a toolbar

- 1 On the **View** menu, click **Toolbars**.
- 2 Click the toolbar you want to reset.

3 Click **Reset.****Note**

Resetting the toolbars returns them to the default, installed setting. This removes any tools that you added and adds tools that were originally on the toolbars.

Resetting the toolbars only affects those tools added or removed through the Customize feature in the Toolbars dialog box or Customize command on the Tools menu.

Only the selected toolbar is reset.

To delete a toolbar

- 1** On the **View** menu, click **Toolbars**.
- 2** Click the toolbar you want to delete.
- 3** Click **Delete**.

**Note**

You cannot delete an FlowCharter 2000 Professional toolbar. You can delete only the toolbars you create.

To make a toolbar a floating palette

- 1 Click in a blank area of the toolbar.
- 2 Hold down the mouse button and drag the toolbar from its position.

To dock a floating toolbar

- 1 Click in a blank area of the toolbar.
- 2 Drag the toolbar to any side of the program's window.
- 3 When the border changes from thick to thin, you can drop the toolbar into position.

To create a floating palette from a toolbar tool

- 1 Click one of the following tools. (These tools are on the **Draw** toolbar).



Text Color



Fill Color



Line Color



Line Style



Line Weight



Arrowheads



Crossovers



Shadow



3D

- 2 Drag the palette off the tool.

- 3 If you want, you can close the **Draw** toolbar. The floating palette remains open until you close it.

To show or hide toolbars

- 1 On the **View** menu, click **Toolbars**.
- 2 Select the toolbars you would like to view, or clear the toolbars you no longer want to view.
- 3 Click **OK**.

Using Color Palettes

With FlowCharter 2000 Professional, you can color text, lines, and fills. You can change default color and create as many as 33 custom colors.

To create a custom color

- 1 Click the **Fill Color** , **Line Color** , or **Text Color**  tool on the **Draw** toolbar.
- 2 Click **More Colors**.
- 3 Click or drag anywhere in the large color window to select a color.
- 4 Click **OK**. The color becomes the selected color for the fill, text, or line. It also appears in the color palette.



—Tips—

Move the vertical scroll bar on the right to adjust the amount of white and black in your color.

For finer control, you can type the values you want in the text boxes. Values must be between 0 and 255.

When the custom color palette is full, you can still add more colors. When you do, the first custom color (in the upper left corner) is removed and your new color is added in the lower right corner of the palette.

If you are using Windows-standard VGA (16 colors), certain colors appear different when drawing lines and typing text, because of the limitations of your display driver.

To color an existing line

- 1 Click the line that you want to apply color to.
- 2 Click the **Line Color**  tool.
- 3 Click the color you want.

To color fill

- 1 Click the shape that you want to apply color to.
- 2 Click the **Fill Color**  tool.
- 3 Click the color you want.

To color existing text

- 1 Click the text that you want to apply color to.
- 2 Click the **Text Color**  tool.
- 3 Click the color you want.

Using ToolTips

ToolTips are short messages that appear in bubble text. These messages help explain the name of the tool or button and, in some cases, what the tool or button does.

To show or hide ToolTips

- 1 On the **View** menu, click **Toolbars**.
- 2 Click **Show ToolTips**.

or

Clear the **Show ToolTips** box.

To use ToolTips

- 1 On the **View** menu, click **Toolbars**.
- 2 Make sure the **Show ToolTips** box is selected.
- 3 Point to a tool or button in the window, and hold the mouse still for a short time. A short message (bubble) appears, explaining the tool or button.

Using Menus and Commands

For every task in FlowCharter 2000 Professional, there is a command. Commands help you carry out actions for selected diagrams, models, shapes, text and lines. You can also use commands to open dialog boxes where more specific functions take place. In many instances, commands on menus have corresponding tools on toolbars.

File menu

The File menu contains the following commands:

Command	Description
New	<p>On the File menu, point to New and click one of the three commands. You can create a new document as a:</p> <ul style="list-style-type: none"> • Basic Diagram • Process • New document based on a template <p> —Note —</p> <p>If you chose to install iGrafx Professional on your machine, then you can also create a new document as an Organization Chart.</p>

Open	<p>Opens an existing diagram or workspace.</p> <p>You can open these file types:</p> <ul style="list-style-type: none"> • Documents (file names ending with an IGX, FLO, ABC, AF3, AF2, PFD, AFT, PFT). • Templates (file names ending with the IGT extension). • Workspaces (file names ending with the IGW extension). <p>The shortcut key is CTRL+O.</p>
Close	Closes the active document.
Close All	Closes all documents.
Save	<p>Stores a document or template as a file.</p> <p>The first time you save a new document choose where you want to store the file. Afterwards, each time you choose the Save command, your changes are saved in that file. You also can save templates for use with new documents.</p>
Save As	<p>Makes a copy of the document under a new name or in another location, so that you have both the original document and a copy.</p>

Save Workspace	<p>Saves the names of open documents and their window arrangement in a file.</p> <p>When you open a workspace file, the document files open and restore the arrangement.</p>
Save as Web Page	<p>Saves an FlowCharter 2000 Professional file with related HTML format or Java applets, including graphics, for publication on the Web. This feature also converts links to the diagram to HTML format. When the diagrams are viewed on the Internet or an intranet and if you converted the links, clicking on a linked shape opens the associated diagram.</p>
Components	<p>Manages diagrams and diagram components by listing them in a hierarchical, or outline, view. This makes it easy to add new diagrams, rename or edit existing diagrams, and delete diagrams you are no longer using.</p>
Shape Library	<p>Adds shapes to the Toolbox toolbar. After you add a shape, you can change its size, line width, and color. You can also duplicate or add Visual Basic functionality to a shape(s).</p>
Template	<p>Provides information on the template associated with the document.</p>

<p>Page Setup</p>	<ul style="list-style-type: none"> • Sets the size of the page. • Sets the orientation of the page (portrait or landscape). • Sets the scaling to fit diagrams on pages. • Sets the size of the page margins (borders). • Sets custom headers and footers. • Sets the order in which pages are printed. <p>If you change your page margin, the objects on the page also move. The default page size is determined by the selected printer.</p>
<p>Print Preview</p>	<p>Previews how the diagram looks when you print it.</p>
<p>Print</p>	<p>Prints your diagrams and adds them to presentations and reports.</p> <p>You can print all the pages, a range of pages, or only selected objects in the diagram.</p> <p>You can also use the shortcut key: CTRL+P.</p>
<p>Send</p>	<p>Creates an e-mail message with the current document as an attachment.</p> <p>This feature works with any MAPI E-mail system. MAPI E-mail systems include Microsoft Mail, Microsoft Exchange, Microsoft Outlook, and Lotus cc:Mail.</p>

Recent File	<p>Lists the last four documents you opened or saved. Quickly opens documents you recently changed. The complete path name appears for documents outside the current directory.</p> <p>A number appears beside each document's name. You can type the number to open the documents or click the document name.</p>
Exit	<p>Closes open documents and the program. Use this command when you finish working with the program, or when you want to free memory to work in another program.</p>

Edit menu

The Edit menu contains the following commands:

Command	Description
Undo	Reverses the last action or change on a diagram. If an action cannot be reversed, Can't Undo appears on the menu.
Redo	Reverses the last undo you made. A description of the action to be redone follows the Redo command. For example, Redo Move indicates that Redo can redo a move action. If the program cannot reverse the most recent undo, Redo is not available.
Cut	Removes the selected objects from a diagram and places them on the Clipboard.
Copy	Copies the selected objects in a diagram and places them on the Clipboard.
Paste	Places the contents of the Clipboard into the active diagram.
Paste Special	Pastes information from the Clipboard in various formats.
Select	Specifies the shapes, lines, text blocks, or OLE objects that you want selected in a diagram.

Select All	Selects all objects in a diagram.
Clear	<p>Deletes the selected objects from a diagram.</p> <p>The Clear command deletes objects permanently. They are not placed on the Clipboard. Use the Undo command to recover a cleared object.</p>
Duplicate	Duplicates the selected objects.
Find	Searches for text in the diagram. You can search the diagram (including shapes, lines, and master Items), in notes, in data fields, or in all of these elements. You can look for the text as a whole word and search for the text exactly as you have entered its case.
Replace	<p>Searches for and replaces text in shapes, lines, notes, and the entire diagram.</p> <p>You cannot replace shape numbers.</p>
OLE Links	<p>Opens a list of the objects linked to the active diagram.</p> <p>Use this command to update the object with changes made in the source file, open the source file, change the source file or item, or break the link to the source file.</p> <p>You can only change the links of linked objects. For example, you cannot break a link of an inserted object.</p>
Object	Opens the object application so you can change the linked or embedded object.

Properties	Displays the Properties dialog box for setting or modifying properties of selected objects.
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View menu

The View menu contains the following commands:

Command	Description
Normal	Displays the diagram graphically.
Tabular	Displays the diagram as a table with associated data for each shape.
Full Screen	Displays all of the elements of your diagram on the screen without menus or tools. Press ESC to return to the previous view.
Master Page	Displays the items that appear on every page. For example, if you place a shape in the bottom left-hand corner of the master page, this shape appears in the same place on every page.
Toolbars	Displays or hides toolbars. You can also customize the toolbars, reset toolbars, create new toolbars, delete custom toolbars, choose large or small tool sizes, choose color or black and white tools, and show or hide ToolTips using this command.
Status Bar	Displays or hides the status bar.
Output	Displays or hides the output window.

Gallery	Displays or hides the gallery.
Note	Displays or hides the Note window.
Hidden Lines	Displays or hides hidden lines.
Page Breaks	Displays or hides page breaks.
Rulers	Displays or hides the rulers.
Zoom	Changes the magnification of a diagram. To zoom in means to magnify. To zoom out means to reduce the magnification.

Insert menu

The Insert menu contains the following commands:

Command	Description
Link	Inserts a link from a shape to another diagram, file, or URL.
Department	Inserts a new department.
Phase	Inserts phase lines in diagrams containing departments.
Picture	Inserts a picture from a file.
iGrid	Inserts an iGrid.
SPC Chart	Inserts SPC charts.
OLE Object	Inserts objects from other applications.

Format menu

The Format menu contains the following commands:

Command	Description
Font	Sets the font, size, color, and orientation for diagram text.
Text Alignment	Selects between horizontal or vertical alignment, and sets text orientation and tab size.
Text Layout	Sets text and subtext area sizes for shapes.
Fields	Creates or edits shape fields.
Numbering	Displays or hides shape numbers, automatically or manually rennumbers shapes, and sets the next shape number.
Fill	Sets shape fill styles as solid, pattern, or gradient.
Line and Border	Sets line size, style, and color.
Shadow/3D	Chooses shadow or 3D styles for shapes.
Callout Line	Chooses callout line sizes, styles, and colors.
Diagram	Edits the properties for departments.

Tools Menu

The Tools menu contains the following commands:

Command	Description
Spelling	Checks the spelling of any text included in documents. You can check the spelling of all the text in the document, or only selected text.
Protect Diagram	Sets or removes password protection to protect your diagram from unauthorized changes.
Change Diagram Type	Changes a Basic Diagram to a Process Diagram or an Organization Chart.  —Note ————— You cannot change a Process Diagram to a Basic Diagram, or change an Organization Chart to either a Basic Diagram or a Process Diagram.
iDiagram	Runs an iDiagram, assigns a starting entity to a shape, and opens the Entity Manager.
Visual Basic	Uses the Visual Basic Editor to edit codes, views VB shape properties, and assign VB macros to shapes.
Custom Data	Manipulates custom data, inserts legends, creates, displays, and updates custom data.

Export Diagram	Exports a diagram to another file.
Export Table	Saves diagram attributes as a tab delimited *.txt file for exporting into a database management tool such as Excel.
Customize	Customizes the program toolbars and the Toolbox.
Options	Sets options for shape spacing and alignment, line spacing, spell checking, displaying the Finished button, displaying the Welcome dialog, and setting the number of Undos and Redos.

Arrange menu

The Arrange menu contains the following commands:

Command	Description
Align	Aligns shapes vertically and horizontally.
Make Same Size	Makes selected shapes the same size.
Space Evenly	Spaces selected shapes evenly.
Auto Layout	Opens the Auto Layout dialog box where you choose options for cleaning up the layout of your diagram.

Grid	Snaps a selected object to the grid, displays or hides grid dots, or snaps all objects to the grid.
Guidelines	Displays or hides vertical or horizontal guidelines or snaps selected objects to the guidelines.
Connect Shapes	Uses a connector line to connect selected shapes.
Replace Shape	Replaces the selected shape(s) with the shape in the Shape Library, Shared Media, or the Clipboard.
Reverse Ends	Reverses the ends of the selected line. This changes the direction of the flow for that line.
Fit to Text	Resizes the selected object or objects based on their text.
Rotate/Flip	Rotates or flips the selected object.
Order	Moves objects in your diagram. You can send objects to the back, bring objects to the front, send an object one level backward, or bring an object one level forward.
Layers	Provides a submenu of commands that opens the Layer Manager, edits all layers, adds layers, selects a layer to move to, moves the layer back one layer, and moves the layer forward one layer.
Convert To	Converts a shape to a graphic or a graphic to a shape.

Combine	Groups and ungroups objects and connects and disconnects closed and open objects. Also, forms new shapes from different combinations of operations that you can perform with shapes.
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Model menu

The Model menu contains the following commands. Use these commands with iGrafx Process 2000.

Command	Description
Run	Runs a check, or test, on the simulation. You can also start, stop, or trace a simulation.
Run Setup	Modifies run setup data.
Generators	Modifies generator attributes.
Resources	Creates or modifies resources used for the simulation.
Schedules	Creates or modifies schedules used for the simulation.
Events	Creates or modifies events used for the simulation.
Attributes	Creates, modifies, or initializes attributes used for the simulation.
Functions	Creates or modifies functions used for the simulation.
Monitors	Creates, modifies, or finds monitors used for the simulation.

Types	Defines the types associated with the simulation.
Transaction Groups	Defines the transaction groups associated with the simulation.
Find Start	Finds the start point for your simulation.

Window menu

The Window menu contains the following commands:

Command	Description
New Window	Creates a new window for the active diagram.
Tile Vertically	Tiles windows vertically.
Tile Horizontally	Tiles windows horizontally.
Cascade	Cascades windows for minimizing or maximizing.
Split	Divides the active window into four panes. You can then view more than one window at the same time.
Window List	Displays the names of the windows open currently. The numbers indicate the order in which the windows were opened. A check mark indicates which window is active.

Help menu

The Help menu contains the following commands:

Command	Description
iGrafx Help	Displays the help file for finding specific information about using the program.
Learn About Help	Describes the advantages of using help.
Tip of the Day	Displays program tips.
Using Help	Describes how to use the help file.
iGrafx Home Page	Displays the home page for the FlowCharter 2000 Professional product in the Micrografx Internet site.
Micrografx Home Page	Displays the Micrografx Internet home page.
Office Compatible	Describes how FlowCharter 2000 Professional is compatible to Microsoft Office.
About iGrafx	Displays the program's version number, copyright, and licensing information.

Getting Started with Diagrams

Creating New Documents

This manual refers to both documents and diagrams. These concepts are different because:

Documents are containers—They can be a single component such as a Basic Diagram or a Process, or contain more than one Basic Diagram or Process. When you create a document, it includes one diagram by default. You create, open, save, and distribute documents.

Diagrams are components of the document—In diagrams, you can place shapes and draw graphics. You can also view, edit, print, and link diagrams to other diagrams in a document. Collecting and linking multiple diagrams to one document keeps corresponding information in one place.

FlowCharter 2000 Professional offers two ways to create documents. You can create documents using:

- **Welcome** dialog
- **New command** on the **File** menu

Welcome dialog

The **Welcome** dialog is the first entry point into FlowCharter 2000 Professional. This dialog offers a graphical point of reference for creating new documents and opening existing ones.



—Note —

You can bypass the Welcome dialog by clicking the Don't Show This Startup Screen Again box in the lower left-hand corner of this dialog.

If you decide later that you want to see the Welcome dialog, use the Options command on the Tools menu to make this change.

New command

The **New** command creates a new document with or without using a template. You can use the **New** command on the **File** menu during any part of your session, including startup.

FlowCharter 2000 Professional includes a manager for templates. Clicking **Template** on the **File** menu opens the **Template** dialog box. Use this box to apply templates, check the dates of template updates, and synchronize an opened document with the most up-to-date template.

To create a new document from the Welcome dialog

- 1 On the Windows **Start** menu, point to **iGrafx**, and click **FlowCharter 2000 Professional**.
- 2 In the **Welcome** Dialog, click **New Document**, and then click **Organization Chart**, **Process**, or **Basic Diagram**.

To create a new document using the New command

- 1 On the Windows **Start** menu, point to **iGrafx**, and click **FlowCharter 2000 Professional**.
- 2 On the **File** menu, click **New**. You can select:
 - Organization Chart** to open iGrafx OrgCharter.
 - Process** to open a process diagram with a default department lane.
 - Basic Diagram** to open a new, blank diagram window.
 - From Template** to open the New dialog box to select a template file.

To create a document from a template

- 1 On the **File** menu, point to **New**, and click **From Template**.
- 2 Click the template you want.
- 3 Click **OK**.
- 4 On the **File** menu, click **Save As**.

- 5 In the **Save as type** box, select **iGrafX (*.igx)**.
- 6 Save the document under a new name.

To create a new template

- 1 On the **File** menu, point to **New**, and click **Basic Diagram**.
- 2 Make changes to the document settings and styles.
- 3 On the **File** menu, click **Save As**.
- 4 In the **Save as type** box, select **iGrafX Template (*.igt)**.
- 5 Give a name to the template in the **File** name box.
- 6 In the **Save in** box, click the drive where you want to save the template.
- 7 Select the folder where you want to save the template.
- 8 Click **Save**.



—Note —

You cannot use templates created in FlowCharter 2000 Professional in FlowCharter 7. Instead you must save them as FLO files and convert them to templates within FlowCharter 7.

Opening Documents

FlowCharter 2000 Professional offers two ways to open documents:

- **Welcome** dialog- Use the **Welcome** dialog to open documents that you have already created.
- **File** menu- Use the **Open** command on the **File** menu.

To open a document using the Welcome dialog

- 1 On the **Windows Start** menu, point to **iGrafX**, and click **Professional**.
- 2 In the **Welcome** dialog, click **Open File**, and then browse to the folder containing your document.

To open a document using the Open command

- 1 On the **File** menu, click **Open**.
- 2 In the **Look in** box, choose the drive where the document resides.
- 3 Double-click on the folders to open the folder where your document resides.
- 4 If necessary, choose the type of file you want to open in the **Files of type** box.

- 5 Click the document you want to open.



—Tip

You can also use the shortcut key: CTRL+O or the Open  tool on the Standard toolbar.

Importing Other Formats

You can take a FlowCharter chart, an Optima file, or an Optima Express file, and convert the data into an FlowCharter 2000 Professional document.

Shapes and lines are automatically converted along with text and graphical information. All linked FlowCharter subcharts can be imported optionally so that the design maintains the hierarchy of processes.

FlowCharter Charts

When importing FlowCharter charts, you may notice a few things:

- Horizontal swimlanes are converted automatically to FlowCharter 2000 Professional departments, and their shapes are converted into activities within the appropriate departments.
- If FlowCharter 2000 Professional finds links to other FlowCharter charts in the file, you receive an Import Options message.

If you choose Yes, the shapes are converted to Process activities and the contents of the linked files are converted into subprocesses. If you choose No, the documents remain separate.

The following table helps you understand the conversion of Process elements:

Element	Description
Shapes	During conversion, any shape that is connected by a line to another shape is automatically converted to an activity.
Graphics and lines	Any shape that is not connected to another shape is converted to a graphic. Also, any line that does not connect shapes is converted to a graphic. Any line that connects shapes is automatically converted to a connection line.
Decisions and Splits	A shape that has more than one labeled output is converted to a Decision activity. A shape that has more than one unlabeled output, and is not a diamond shape, is converted to an implicit Split activity.
Text	Any text object, other than text that labels an output line from a symbol, is converted to a text graphic.
OLE	Any OLE object is converted to an OLE graphic.

To open a FLO file

- 1 On the **File** menu, click **Open**.
- 2 In the **Look in** box, choose the drive where the file resides.
- 3 In the box, double-click the folders until you open the folder where your file resides.
- 4 In the **Files of type** box, click **Micrografx FlowCharter 7.0 File (FLO)**.
- 5 Click the FLO file you want to open.

To open a PFD file

- 1 On the **File** menu, click **Open**.
- 2 In the **Look in** box, choose the drive where the file resides.
- 3 Double-click the folders to open the folder where your file resides.
- 4 In the **Files of type** box, click **Micrografx Optima 2.5 File (PFD)**.
- 5 Click the PFD file you want to open.

To open a DRW file

- 1 On the **File** menu, click **Open**.
- 2 In the **Look in** box, choose the drive where the file resides.

- 3 Double-click on the folders to open the folder where your file resides.
- 4 In the **Files of type** box, click **Micrografx Draw 6.0 File (DRW)**.
- 5 Click the DRW file you want to open.

Exporting Diagrams and Tables

You can use FlowCharter 2000 Professional to export diagrams and tables to other image editing and database management applications. Both options are useful, but produce different results.

Image Editing—Choose the **Export Diagram** command to preserve how the diagram looks on the page. You can save elements such as shapes, lines, and text along with their formatting and position as file types that you can view in other image editing applications.

Database Management—Choose the **Export Table** command to preserve the information contained within the shapes as tab-delimited data. You can save field information such as links, IDs, coordinates, and shape numbers in a table format for exporting or copying into database and speediest applications.

To export a diagram

- 1 On the **Tools** menu, click **Export Diagram**.
- 2 In the **Export Diagram** dialog box, type a name for the diagram in the **File Name** box.

- 3 Choose the drive and directory in which you want to store the diagram.
- 4 Select what you would like to save the diagram as in the **Save as Type** box.
- 5 Click **Save**.



—Note

Depending on what type you want to save your diagram as, another dialog box may appear where you can select additional options before saving.

To export a table

- 1 On the **Tools** menu, click **Export Table**.
- 2 In the **Export Table** dialog box, expand the field lists in the box. To view the fields in alphabetical order, select the **Alphabetical** option.
- 3 Drag the fields contained in your diagram from the list down to the window at the bottom of the dialog box, and drop them.



—Note

If you are in the tabular view when you open the Export Table dialog box, the set of columns are not identical to, but contain the same data as, the visible tabular view columns.

- 4 To save your field selections as a predefined set, click **Save As**, and type a name for them in the **Predefined Sets** select box.

The set is saved and appears in the **Predefined Sets** select list. The set will also appear as a selection the next time you open the **Export Table** dialog box.



—Tip —

You can also select the Include Headers box to label columns appearing in your table. Selecting this option labels the first row of each column the same as header rows. To edit the header labels, click on the first row in each column and type a new name.

- 5 Click **Export**.

or

Click **Copy**.

Export—Opens the **Save As** dialog box where you can save your dropped fields as a tab-delimited text file. When you open an application like Excel, it recognizes that you have saved a tab-delimited file and organizes your fields accordingly.

Copy—Copies your fields to the clipboard for pasting into another application that recognizes tab-delimited information.



—Tip —

Click **Copy** in the **Export Table** dialog box and then click the **Paste** command on the **Edit** menu in Excel for the quickest export.

To change the field view for exporting a table

- 1 On the **Tools** menu, click **Export Table**.
- 2 In the **Export Table** dialog box, select either **Alphabetical** or **By Group**.

To modify and save predefined sets for exporting or copying a table

- 1 On the **Tools** menu, click **Export Table**.
- 2 In the **Export Table** dialog box, select an existing predefined set from the **Predefined Set** select box, drag an existing field(s) from the window at the bottom of the dialog box back up to the field list, and drop.
- 3 Click **Save As**.
- 4 Rename the predefined set.

To reorder columns before exporting or copying a table

- 1 On the **Tools** menu, click **Export Table**.
- 2 In the **Export Table** dialog box, select a predefined set from the **Predefined Set** list box.
- 3 In the window at the bottom of the dialog box, click a column, and drag it left or right. Repeat this procedure to reorder other columns appearing in your table.
- 4 Click **Export**.

or

Click **Copy**.

To remove columns before exporting or copying a table

- 1 On the **Tools** menu, click **Export Table**.
- 2 In the **Export Table** dialog box, select an existing predefined set from the **Predefined Set** select box, drag an existing field out from the window at the bottom of the dialog box and drop them in the list box above the window.
- 3 Repeat this procedure to remove other columns from the table.
- 4 Click **Export**.

or

Click **Copy**.

Viewing Diagrams

FlowCharter 2000 Professional offers several ways to view new diagrams you are creating, or view documents you have already created. Before using a view, ask yourself the following questions:

- What type of diagram do I want to create?
- How will I be using a diagram already created?

Normal View

Normal is the most popular view for editing diagrams. In Normal view you work with a diagram space, or the area containing shapes, graphics, text, and lines. This space is set by default at 100%. Use the **Zoom Control** to change the view percentage to view more or less of the diagram space.

Tabular View

The Tabular view can be used for viewing data contained within the diagram. This includes departments, shapes, and connector lines.



—Note —————

You can edit data in both the Normal and Tabular view.

Full Screen View

Use the Full Screen view to show someone the diagram and do a chalk talk about it. While in full-screen mode, draw on the screen. When you finish, press ESC to return to the previous view. In the Full Screen view, use the mouse buttons to draw using different colors.

- To draw in red, click the left mouse button and drag.
- To draw in green, click the right mouse button and drag.
- To draw in yellow, click both mouse buttons and drag.

- You can use the following keys when working in Full Screen view: **DEL**, **Spacebar**, **E** - Erase diagram annotations, **TAB**, **PAGE DOWN**, **N** - Go to the next diagram window, and **SHIFT+TAB**, **PAGE UP**, **P** - Go to the previous diagram window.

Master Page View

Master Page view shows you what elements appear on the Master Page. Anything placed on the Master Page appears on every page of the diagram when printing or using the **Print Preview** command.

To use Normal view

On the **View** menu, click **Normal**.

To use Tabular view

On the **View** menu, click **Tabular**.

To use Full Screen view

- 1 On the **View** menu, click **Full Screen**.
- 2 To draw in red, click the left mouse button and drag.
or
To draw in green, click the right mouse button and drag.
or
To draw in yellow, click both mouse buttons and drag.

- 3 Press **ESC** to leave the full-screen view.

To view the Master Page

On the **View** menu, click **Master Page**.

Zooming Diagrams

Changing the zoom percentage on a diagram helps you get a better view of a shape or a group of shapes. Zoom in to see text and notes on a few shapes, or zoom out to see the layout of all shapes.

To choose a zoom percentage

- 1 Click the object you want centered in the window.
- 2 Click the down arrow in the **Zoom** box on the **Standard** toolbar.
- 3 Click the viewing percentage at which you want to view the diagram.
- 4 To scale the diagram to fit in the current window, use **Best Fit**.
or
To always view the entire diagram, use **View**.



—Tips—

You can also use the Zoom command on the View menu to change the zoom percentage.

Using FlowCharter 2000 Professional Tools

Several tools and commands exist in FlowCharter 2000 Professional to help you change the appearance of diagram components, give you information about performing tasks, and split up the visible diagram space.

These tools include:

- Gallery
- Share Media
- Notes
- Output Window
- Status Bar
- Rulers, Page Breaks, and Hidden Lines
- Window commands

Gallery

The Gallery is a formatting command center. From the Gallery, you can drag and drop shapes, change color, add text and lines, add shadows and 3D attributes, and change fonts and line ends. The Gallery is positioned on the right-hand side of the screen for easy access.

iGrafx Share Media

After you install iGrafx Share Media it becomes part of the Gallery. It contains many features that makes communicating with graphics easy and efficient.

With iGrafx Share Media, you can:

- Browse and access media quickly with the Media Browser.
- Customize toolbars and ToolTips.
- Bring in multimedia files, such as AVI, WAV, and Animated GIF files.
- Play multimedia files in place when you pause the cursor over the thumbnail of the file.
- Bring in graphics from a digital camera or scanner.
- Easily customize the look and feel of iGrafx Share Media with the Customize Workspace Wizard.
- E-mail media to coworkers with the Send Wizard.
- Access frequently used media with the Bookmark feature.
- Create portable collections quickly and easily with the Package Media Wizard. This lets you work with graphics when you're away from the office.
- Find and import media by file type with the Import Files Wizard.
- Print one or more graphics with the Print Wizard
- Keep Share Media on top of other applications for ease in adding graphics to your documents

- Add media using Windows Explorer, even if Share Media is not open.



—Note

The features you see in Share Media depend upon the way your system administrator sets up Share Media on your computer.

Notes

The Note window contains text attached to a certain shape. You can hide notes containing detailed information about a step or process that you do not want displayed in a diagram. Note text can also be copied from one shape and pasted into another.

Type and change notes inside the Note window. The Note window displays the shape number of the selected shape (if any), and the text attached to the shape. In a diagram, shapes with notes attached are marked by default with the letter N.



—Tip

In the Format Diagram dialog box, click the Indicators tab to change the indicator for notes. You can also display the actual text in the diagram using the Fields command on the Format menu.

Indicators

Indicators are shadows and symbols added to shapes, and nodes added to lines. Shape indicators help you identify shapes that are used to open linked diagrams (or launch other applications) or that have notes attached to them.

- Shapes that open linked diagrams (or launch other applications) can be indicated with text, a shadow, an icon, or a line.
- Shapes that have notes attached to them can be indicated with text or a shadow.

You can use shadows and choose the symbols used for indicators. The default indicators are a shadow for link and -N for notes. You can use up to three text characters to create your own indicators. Also, use the **Line** option and click **Format** to open the **Link Indicator Format** dialog box to format the way lines appear as an indicator for linked diagrams.



—Tip —

You can choose the font, point size, color, and style you want for text indicators. The settings you choose are also used for shape numbers.

Output Window

The Output window is used to display messages, errors, and warnings. For example, if you add expression information to a shape any errors in this expression will display in the Output window. Double-clicking on the error in the Output window takes you to the shape where you can repair the error.

Status Bar

Use the Status Bar for help on toolbar tools and menu commands. Passing the cursor over items in the window displays a short description about the item.

Rulers, Page Breaks, and Hidden Lines

Rulers, page breaks, and hidden lines serve as navigators for the diagram space. Without them, it is difficult to align shapes and determine logical points that break up the page. This can be a problem in large diagrams where you must use the **Zoom Control** to view everything.

Window commands

Window commands help you manage your workspace and diagrams that you create or have open. You find these commands on the **Window** menu.

To show or hide the Gallery

On the **View** menu, click **Gallery**.

To open iGrafx Share Media

On the **Windows Start** menu, point to **iGrafx**, and click **Share Media**.

To open the Note window

On the **View** menu, click **Note**.



—Tip —

You can press F6 to open and close the Note window.

To attach a note to a shape

- 1 If the Note window is not displayed, click Note on the **View** menu.
- 2 Select the shape to which you want to attach a note.
- 3 Click in the Note window, and type the information you want.
- 4 Close the Note window.

To delete text in the Note window

- 1 If the Note window is not displayed, click Note on the **View** menu.
- 2 Select the shape to which the note is attached.
- 3 Point inside the Note window. The pointer changes to the I-beam pointer.
- 4 Select the text you want to delete.
- 5 On the **Note** menu, click **Clear** or press the **DELETE** key.

To print a note

- 1 On the **View** menu, click **Note**.
- 2 Select the shape to which the note is attached.
- 3 On the **Note** menu, click **Print**.
- 4 Choose the print options you want.
- 5 Click **OK**.

To choose indicators for shapes

- 1 On the **Format** menu, click **Diagram**.
- 2 In the **Format Diagram** dialog box, click the **Indicators** tab.
- 3 To set the indicator type for a shape with a link, click the down arrow in the **Link** area, and click the type you want to use.

- 4 If you want to use a text symbol to indicate a shape with a link, type up to three characters in the box in the **Note** area.
- 5 If you want to use a shadow to indicate a shape with a note, select the **Shadow** option.
- 6 If you want to change the indicator style for nodes or intersections, choose a new style and color.
- 7 Click **OK**.

To open the Output window

On the **View** menu, click **Output**.

To use the Status Bar

Move the cursor over any toolbar tool or menu command.

A description of the tool or command appears in the lower left-hand corner of the FlowCharter 2000 Professional window.

To turn rulers on or off

On the **View** menu, click **Rulers**.

To turn page breaks on or off

On the **View** menu, click **Page Breaks**.

To turn hidden lines on or off

On the **View** menu, click **Hidden Lines**.

To tile windows vertically or horizontally

On the **Window** menu, click **Tile Vertically** or **Tile Horizontally**.

To cascade windows

On the **Window** menu, click **Cascade**.

To split windows

On the **Window** menu, click **Split**.

Editing Diagrams

You can find most of the editing functions in FlowCharter 2000 Professional on the **Edit** menu. On this menu you can do things like duplicate objects and find text. Editing is different from formatting in that you are working with existing components, and not changing the size, or applying new colors, lines, and text.

Through editing, you can do things like:

- Change an open diagram and save it under a new name. This saves you from creating a new one.
- Paste special text and graphics from other applications into FlowCharter 2000 Professional.
- Find text occurrences in diagram shapes or notes, and replace them with a different word or phrase.

Cutting, Copying, and Pasting

With FlowCharter 2000 Professional, you can cut, copy, and paste objects or groups of objects to the Clipboard for moving into another diagram or even another application.

The **Paste Special** command pastes information from the Clipboard into your diagram in various formats. Use this command to link information to the active diagram.

Depending upon the information in the Clipboard, your paste format options may include an embedded OLE object, Rich Text Format (RTF), non-formatted text, a metafile (which acts as a diagram shape), and a bitmap.

After you link an object to a diagram, any changes made to the object in its source file in the original program (the object application) are reflected in the diagram.



—Note

The difference between the Paste Special command's Paste Link option and the Insert Object command is that when you insert an object, the entire object is included in your diagram. With the Paste Link option, you can select a portion of a document, spreadsheet, or bitmap and paste it into your diagram. When something is Paste Linked, you cannot change it in your diagram as you can an inserted object.

Selecting, Deleting, and Duplicating Diagram Objects

Use the **Select** and the **Select All** commands on the **Edit** menu for deleting or duplicating diagram objects. On the **Select** dialog box, you can choose which diagram components to select or ignore.

Finding and Replacing Text

Use the **Find** command to search text in diagrams, custom data fields, or notes. You can search for exact words or variations of a word. For example, select the **Match case** option on the **Find** dialog box, type the word *auto*, and the search finds *auto* and *automobile*.

Spell Checking

The spell checking feature checks spelling by comparing words in your document with words in a dictionary. The default dictionary is a file containing thousands of words. If a word is found that is not in the dictionary, the word is considered a possible misspelling.

The program displays a list of words similar to the misspelled word. You can select one of the words, type the correct spelling yourself, ignore the word, or add the misspelled word to the user dictionary.

You can customize the spell checker by:

- Defining user dictionaries for special purposes.
- Specifying that the program ignore words with numbers during spell checking.

Protecting Diagrams

At times, you might want to prevent other people from modifying a diagram. You can protect a diagram by assigning it a password. No one is able to type field data into it until the password is typed correctly. If the diagram contains hidden data fields, they are hidden from view until the password is entered correctly.

You can use password protection to manage linked files. By assigning each person in a workgroup a different password, you can ensure that each person has access only to his or her own diagrams.

To undo an action

On the **Edit** menu, click **Undo**.

or

Click the **Undo**  tool.

To redo (reverse) your last undo

On the **Edit** menu, click **Redo**.

or

Click the **Redo**  tool.

To cut objects

- 1 Select the object or objects to cut.
- 2 On the **Edit** menu, click **Cut**.

or

Click the **Cut**  tool.



—Tips—

The keyboard shortcut for cutting an object is CTRL+X.

Shapes or text cut or copied from the diagram window cannot be pasted into the Note window.

To copy objects

- 1 Select the object or objects you want to copy.
- 2 On the **Edit** menu, click **Copy**.

or

Click the **Copy**  tool.



—Tips—

You can also press CTRL+C to copy a selected object.

Shapes or text copied or cut from the diagram window cannot be pasted into the Note window.

To paste objects

On the **Edit** menu, click **Paste**.

or

Click the **Paste**  tool.



—Tips—

You can also press CTRL+V to paste the object.

You can paste notes into the active diagram window using the Paste command. Before you can paste something from the Note window, you must select a shape or click the left mouse button on the active diagram.

To use the Paste Special command

- 1 Select the object(s) or text in another application.
- 2 Copy the objects to the application's clipboard.
- 3 Switch to **iGrafX FlowCharter 2000 Professional**.
- 4 On the **Edit** menu, click **Paste Special**.
- 5 Select the paste type (as text, picture) from the list.

- 6 Click **OK**.



—Note

If you have copied a linked object or text from another application, the Paste Link option is selected on the Paste Special dialog box. This keeps this object or text linked back to its original application.

To select diagram components

- 1 On the **Edit** menu, click **Select**.
- 2 Click one or more of the check boxes to select all objects of that type.



—Tips

In the Name box, you can click a shape name to select all shapes of that kind.

You can also select all objects using the Select All command on the Edit menu.

You can select multiple objects. Press and hold SHIFT as you click each object.

To delete objects

- 1 Select the object you want to delete.
- 2 On the **Edit** menu, click **Clear**.



—Tips—

You can also press DELETE to delete the selected object.

When you choose the Clear command, objects are deleted permanently. They are not placed on the Clipboard.

Use the Undo command to recover a cleared object.

To duplicate objects

- 1 Select the object or objects you want to duplicate.
- 2 On the **Edit** menu, click **Duplicate**.



—Note—

You can also press and hold the CTRL key and drag the selected objects to duplicate them.

To find text

- 1 On the **Edit** menu, click **Find**.
- 2 Enter the text to find.



Note

The search finds text only in the diagram. It cannot search inserted OLE objects from other programs. To find text in inserted objects, open the object and search for the text within its program.

You can search the diagram (including shapes, lines, and master items), in notes, in data fields, or in all of these elements.

To replace text in a diagram

- 1 In the **Edit** menu, click **Replace**.
- 2 Type the text you want to find in the **Find** box.
- 3 Type the text you want to use as replacement text in the **Replace** box.

To choose spelling options

- 1 On the **Tools** menu, click **Options**.
- 2 Click the **Spelling** tab.
- 3 Type the path and file name of the dictionary to be used for spell checking.

- 4 To ignore words with numbers, click **Ignore Words with Numbers**.
- 5 Click **OK**.

To check spelling

- 1 Select the elements you want to spell check. If no elements are selected, the entire diagram is spell checked.
- 2 On the **Tools** menu, click **Spelling**.

or

Click the **Spelling**  tool.



—Note

Misspelled words are displayed in the Not in Dictionary box. A suggested replacement is shown in the Change To box.

- 3 You can type in a replacement or choose another replacement from the list.
- 4 To correct the word, click **Change** or **Change All**.
- 5 If the word is not misspelled, click **Add** to add the word to the user dictionary and continue, or click **Ignore** or **Ignore All** to ignore the word or every instance of the word.

To protect a document

- 1 On the **Tools** menu, click **Protect Document**.
- 2 In the **Password** field, type a password.
- 3 In the **Verify** field, type the same password again.
- 4 Click **OK**.



—Note

If you open a protected diagram a message reminds you that you have to type the password before you can make changes to the diagram.

To unprotect a document

- 1 On the **Tools** menu, click **Unprotect Document**.
- 2 Type the correct password.
- 3 Click **OK**.



—Note

If you enter the wrong password, a message appears telling you that the password is incorrect. Click OK and enter the correct password. If you do not know the password, click Cancel. You can change the diagram after you enter the correct password.

Printing Diagrams

When you print a diagram, you can choose several options such as including or excluding diagram components, queuing just the active diagram or the entire document set, or printing to a file. You can also choose the option to print all of the diagrams and components within a document.

Check the following commands and dialog boxes for printing options:

- The **Print** command on the **File** menu. This opens the **Print** dialog box where you can select or change options.
- The **Page Setup** command on the **File** menu. This opens the **Page Setup** dialog box where you can select the **Options** tab to find other print options. These print options include:

Frame—Prints frames around diagram pages if you are in Book Mode.

Notes—Prints notes on shapes.

To print a diagram

- 1 On the **File** menu, click **Print**. Information about the printer appears at the top of the dialog box. (The printer information applies to the printer to which the next print job is sent.) You can also choose another printer.
- 2 Choose a **Print Range** option.
- 3 In the **Copies** text box, type the number of copies you want.

- 4 In the **Print What** box, select the active diagram or the entire document.
- 5 To send the output to a file instead of a printer, select the **Print to File** box if you want.
- 6 Click **OK**.



—Tips

You can also use the shortcut key: CTRL+P.

If you choose the Print to File option, a dialog box opens. Type the file name you want and click OK. The diagram information is saved in a file in the current directory.

To print Notes or blank pages, choose the print order, and fit the diagram to the page, click Page Setup on the File menu, then click the Print Options tab.

To see a print preview of your diagram

On the **File** menu, click **Print Preview**.



—Tip

You can zoom in by clicking the diagram area you want to see in more detail.

Saving and Closing Documents

You can save a document by naming it or renaming it, and clicking the following commands on the **File** menu:

- **Save** and **Save As** - Save a document as an FlowCharter 2000 Professional document or template, older FLO files, or a DRW file.
- **Save Workspace** - Saves your document as an iGrafx Workspace (*.igw)
- **Save as Web Page** - Saves your document(s) for publishing on the Web.

If you plan on distributing documents to others, save them as Web pages or as older FLO files. Before sharing these documents with others, ask if they have a Web browser or an older version of FlowCharter installed.

You can close a document or documents using the **Close**, **Close All**, or **Exit** commands on the **File** menu.

Saving Documents in Older FLO Formats

Saving your documents in the FLO format enables those individuals who use FlowCharter 7 to open and view documents.

Saving a Workspace

A workspace is the set of currently open documents. Because you often work on the same set of documents for a project, the workspace feature opens them to resume your work. When saving a workspace, you can save the names of the open documents (not the documents themselves) and the arrangement of the documents in the program window.

Saving as a Web Page

After you create a document in FlowCharter 2000 Professional, you can output it to Hypertext Markup Language (HTML), Java® Applets, or WebCGM file. HTML is a standard language that defines the layout, text, and graphics of a Web page.

When you save a file to HTML or Java, you specify which parts of the diagram are to be saved as part of the Web page. You can view the HTML output with a Web browser such as Netscape Navigator or Microsoft's Internet Explorer, or any other Web browser that supports images, client-side image maps, and tables.

Element	Description
Images	The Web browser should be able to view GIF files.
Client-side image maps	The Web browser should support client-side image maps so that the navigation from the diagram images works.

Tables	The Web browser should support tables because the HTML output makes extensive use of tables in the navigation elements and in the report output. Particularly recommended is a Web browser that supports color in table backgrounds.
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At the bottom of each Web page is an index of any other diagram links that were included.

WebCGM Files

WebCGM is a subset of the ISO Computer Graphics Metafile (CGM) standard and is a new option for saving your document as a web page. Outputting to a WebCGM file however does have some limitations:

- Only supports four fonts. The fonts are Times Roman, Helvetica, Courier and Symbol. Any text exported is converted to use one of these fonts.
- Gradients are also not supported by the WebCGM profile. In addition, fill patterns are drawn differently by the WebCGM viewer. While the basic pattern is the same, there are differences that change when you zoom in on a WebCGM metafile.
- Does not support indicators (Shape Numbers and Notes).
- Does not support departments or phases.
- Does not support rotated text.

If you save to WebCGM, you may not have the correct viewer installed on your machine to view the output correctly. If you receive the following message, please go to our site to download the browser.

This image has been saved in WebCGM (Web Computer Graphic Metafile) format. To view the image, please install the free ActiveCGM Browser available at www.micrografx.com/resources/activeCGM.asp.

Understanding HTML Naming Conventions

When outputting components (diagrams, scenarios, or reports) to HTML, it is important to understand how they get named. Two options are available for naming your HTML documents:

Option	Description
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<p>Use Long Filenames</p>	<p>The default setting in the Save as Web Page dialog box outputs components using long filenames (the original names of your diagrams, scenarios, or reports). This helps manage and organize your HTML files better, and publish to mediums that do not support non-8.3 names. A few exceptions exist when using long filenames:</p> <ul style="list-style-type: none"> • Characters not legal in filenames or URLs are replaced with an underscore (“_”) Legal characters include: A-Z, a-z, 0-9, and the symbols, \$- _@.&+!(),”. • Cases may occur in a document(s) where two components share the same filename. If this conflict occurs, the diagram, scenario, or report in question defaults to the component name. <p>If a component has more than one page, subsequent pages use the original name followed by an underscore and a page number. For example, Inventory_p2. Multiple graphics converted to GIF files are labeled in the same manner.</p>
<p>Not using long file names</p>	<p>If you clear the Use Long Filenames option, any components with names over 8 characters are replaced with a default name. For example, if you have a diagram named businessprocess within your document, it will output as dgm1.htm</p>

Automatic Recovery

FlowCharter 2000 Professional includes a feature that saves the diagram or document that you are working on automatically at a set time increment. Automatic Recovery protects your work from an unexpected system or program failure.

To save a document or template

- 1 On the **File** menu, click **Save**. If you are saving a file for the first time, the **Save As** dialog box opens. If you have already saved the file, your changes are saved in the file you named earlier.
- 2 Type the file name in the **File Name** box.
- 3 Choose the drive and directory in which you want to store the file.
- 4 Choose the file format (document or template) in the **Save as type** box.



—Tips—

You can also use the shortcut key: CTRL+S.

A template includes all document settings and styles.

You cannot use templates created in FlowCharter 2000 Professional in earlier versions of FlowCharter. Instead you must save them as FLO or AF3 files and convert them to templates within those applications.

To save a copy of a document

- 1 On the **File** menu, click **Save As**.
- 2 Type a file name for the document copy. Use a different name to distinguish between the copy and the original.
- 3 Choose the drive and directory in which you want to store the copy.
- 4 Click **OK**.

To save a workspace

- 1 On the **File** menu, click **Save Workspace**.
- 2 Type a name for the workspace file in the **File Name** box.
- 3 Choose the drive and directory in which you want to store the workspace file.
- 4 Click **OK**.



—Note—

Only saved documents are included in the workspace file. If any of the documents in the workspace have not been saved, the Save File dialog box opens to save them.

To reopen the workspace

- 1 On the **File** menu, click **Open**.
- 2 Choose **Workspace** in the **Files of Type** box.
- 3 Choose the drive and directory that contain the workspace file you want.
- 4 Click the file you want to open.
- 5 Click **OK**.

To save documents in FlowCharter 7 format

- 1 On the **File** menu, click **Save As**.
- 2 Choose the Micrografx FlowCharter 7.0 File (FLO) format in the **Save as type** box.
- 3 Type the file name you want in the **File** name box.
- 4 Choose the drive and directory where you want to store the file.
- 5 Click **OK**.

To save a diagram as a Web page

- 1 On the **File** menu, click **Save as Web Page**.
- 2 Choose the folder location to save the page(s).
- 3 Select the diagram(s) and components to save.

- 4 Choose if you want to output diagrams as Java applets, output shape notes, save linked FlowCharter 2000 Professional documents, or use long filenames.



—Tip

If you are not outputting diagrams as Java applets, you can save multiple-page diagrams to a single HTML page by selecting the Save Multiple-Page Diagrams to a Single HTML Page check box. For example, if you have three diagrams in a document and select this option, all three diagrams will appear on one HTML page which makes it easier to print from your browser.

- 5 Click **OK**.
The **Save As Web Page- Finished** dialog opens.
- 6 Click **Close** or click **View** to view the page(s) in your Web browser.

To set the automatic recovery time

- 1 On the **Tools** menu, click **Options**.
- 2 In the **Options** dialog box, click the **General** tab.
- 3 Select **Save Auto Recover** info.
- 4 In the **Time** select box, type an increment between 1 and 15 minutes.
- 5 Click **OK**.

Distributing Documents

Distributing documents to team members, departments, and even other companies is a great way to communicate ideas and tasks. With FlowCharter 2000 Professional, you have three ways to do this:

- Using iGrafx Share
- Sending documents as e-mail attachments
- Sending documents as HTML or Java applets

Using iGrafx Share Viewer

iGrafx Share Viewer contains many features that help you and your coworkers easily collaborate about a diagram.

When you add markups using Viewer, they are displayed when you open them in FlowCharter 2000 Professional.

With iGrafx Share Viewer, you can:

- Open and view multiple diagrams.
- Add markups to a diagrams.
- Page tabs let you navigate with ease in multiple-page diagrams.
- Share Viewer remembers which markups belong to each reviewer.
- View markups by all reviewers, a particular reviewer, or view only your own markups.
- Edit text and marker colors.
- E-mail a diagram that contains your markups.

Sending Documents as E-mail Attachments

FlowCharter 2000 Professional works with any MAPI E-Mail system, such as Microsoft Outlook, allowing you to send documents as attachments with e-mail messages. The Send command automatically opens your e-mail and attaches the open document, so you can address and send the mail like any other message.

To open iGrafx Share Viewer

On the **Windows Start** menu, point to **iGrafx**, and click **Share Viewer**.

To send a document as an e-mail attachment

- 1 Open the document to attach to an e-mail message.
- 2 On the **File** menu, click **Send**.
- 3 Address the e-mail and create a message as you usually do.



Notes

This feature works with any MAPI E-mail system. MAPI e-mail systems include Microsoft Mail, Microsoft Exchange, and Lotus cc:Mail.

If the mail system is not running, it starts when you click the Send command.

Setting Up a Diagram

Setting Up the Diagram Page

With almost unlimited diagram space on the screen, you can create very large, in-depth diagrams without getting a clear idea of where page breaks occur, the placement of headers and footers, or the size of your margins.

This becomes important when you need to print diagram pages. Use the **Page Setup** dialog box to adjust page options such as scaling and page order so a diagram prints correctly.

To define the page setup

- 1 On the **File** menu, click **Page Setup**.
- 2 Click each tab, and select the page setup options you want.
- 3 Click **OK**.

To select the diagram orientation

- 1 On the **File** menu, click **Page Setup**.
- 2 Select **Portrait** or **Landscape**.
- 3 Click **OK**.

To set diagram scaling

- 1 On the **File** menu, click **Page Setup**.
- 2 Select **Adjust to**, and type a percentage in the normal size box.
or
Select **Fit to**, and type a number of pages wide by a number of pages tall.
- 3 Click **OK**.

To set the paper size

- 1 On the **File** menu, click **Page Setup**.
- 2 Select a paper size from the **Paper Size** list.
or
Type a paper width in the **Width** box, and a paper height in the **Height** box.
- 3 Click **OK**.

To set page margins

- 1 On the **File** menu, click **Page Setup**.
- 2 Click the **Margin** tab.
- 3 Select each of the Margin boxes individually and type the margin you want.

- 4 Click **OK**.



—Note

FlowCharter 2000 Professional rounds the numbers to the nearest hundredth of an inch or tenth of a centimeter. To switch between inches and centimeters, right mouse click on the ruler, and click either Inches or Centimeters.

To set diagram titles

- 1 On the **File** menu, click **Page Setup**.
- 2 Click the **Options** tab.
- 3 To print out large multi-page diagrams that you can cut and tape together, select **Poster Mode**, and set the overlap for extra taping room.

or

To print out multi-page diagrams that you can bind in a book, select **Book Mode**.

To set the Print Frame option

- 1 On the **File** menu, click **Page Setup**.
- 2 Click the **Options** tab.
- 3 Select **Book Mode**.
- 4 Select the **Frame** option.

To set the Print Notes option

- 1 On the **File** menu, click **Page Setup**.



—Note

Notes print after the pages of the diagram print. Notes use shape numbers to reference back to shapes in the diagram.

- 2 Click the **Options** tab.
- 3 Select the **Notes** box.
- 4 Click **OK**.

To set the page order for printing

- 1 On the **File** menu, click **Page Setup**.
- 2 Click the **Options** tab.
- 3 Select **Down, Then Across** to print top to bottom and left to right.
or
Select **Across, Then Down** to print left to right and top to bottom.
- 4 Click **OK**.

Using Headers and Footers

Headers and footers help you and those who view your diagrams:

- Get information about a diagram using names and page numbers.
- Keep up with revisions and diagram opening and saving using date and time stamps.

With FlowCharter 2000 Professional you can insert default header and footer information or create custom headers and footers.

To insert a predefined header or footer

- 1 On the File menu, click **Page Setup**.
- 2 Click the **Header/Footer** tab.
- 3 Select a style and position combination from the **Header** list.
- 4 Select a style and position combination from the **Footer** list.
- 5 Click **OK**.

To create a custom header or footer

- 1 On the **File** menu, click **Page Setup**.
- 2 Click the **Header/Footer** tab.
- 3 Click **Custom Header** or **Custom Footer**.

- 4 To insert the header or footer information you want in each section, click inside **Left Section**, **Center Section**, or **Right Section**, and then click the buttons.



—Note

To add additional text to the header or footer, enter the text in the Left Section, Center Section, or Right Section box.

Using Guidelines and Grids

You can use guideline and grid options in FlowCharter 2000 Professional to improve the look of your diagram.

Guidelines

You can use guidelines to align objects. When you drag a shape near a guideline, the shape's sides and center snap into alignment with the guideline. Guidelines help you align shapes of different sizes to achieve an attractive, organized look. Guidelines do not appear in the printed diagram.

Grids

Grids also help you with alignment by snapping shapes to a series of snap points on the diagram space. When grid snapping is turned on, every shape that you move locks on to these points. If you open a diagram and see that objects are not organized and neat, this could be an indication that grid options were not used. Use the **Snap Objects to Grid** command on the **Arrange** menu to organize these objects in the diagram. You can also find the following grid options in the **Alignment** tab by clicking the **Options** command on the **Tools** menu:

- Snap to Grid—Select this option to snap your objects to grids.
- Show Cross Hairs When Moving Objects—This option shows two gray cross hairs, one vertical and one horizontal, when you move a shape from one location to another.

To add a horizontal guideline

- 1 On the **Arrange** menu, point to **Guidelines**, and click **Add Horizontal Guideline**.
- 2 Position the guideline by dragging, and click in the diagram space.

You can also click the horizontal ruler, and drag a guideline down to the desired position in the diagram.



—Tip —

You can add a guideline with a right-mouse click. Right-mouse click in the ruler area, and click Add Horizontal Guideline.

To add a vertical guideline

- 1 On the **Arrange** menu, point to **Guideline**, and click **Add Vertical Guideline**.
- 2 Position the guideline by dragging, and click in the diagram space.

You can also click the vertical ruler, and drag a guideline across to the desired position in the diagram.



—Tip —

You can add a guideline with a right-mouse click. Right-mouse click in the ruler area, and click Add Vertical Guideline.

To move a guideline

- 1 Point to the guideline you want to move.
- 2 Press and hold the left mouse button, and drag the guideline where you want it.

- 3 When you are finished, release the mouse button.

To delete a guideline

- 1 Click the guideline you want to delete.
- 2 Press and hold the left mouse button.
- 3 Drag horizontal guidelines to the horizontal ruler, or off the bottom edge of the window. Drag vertical guidelines to the vertical ruler, or off the right edge of the window.
- 4 When the guideline pointer is positioned over the appropriate ruler, release the mouse button.

To turn on grid snapping

On the **Arrange** menu, point to **Grid**, and click **Snap to Grid**.

To show grid dots

On the **Arrange** menu, point to **Grid**, and click **Show Grid Dots**.

To snap objects to the grid

On the **Arrange** menu, point to **Grid**, and click **Snap Objects to the Grid**.



—Tip —

To set the grid spacing, click the Options command on the Tools menu, and then click the Alignment tab.

Setting Up Departments

You can use departments to display the flow of information and materials between different roles, groups or organizational units. In process diagramming, departments help show how tasks flow through groups such as manufacturing and customer service toward a final outcome or creation of a product. Many processes contain subprocesses that appear in their own departments.

Shapes behave the same in departments as they do on a normal diagram page. You can still connect lines, edit points, size, move, delete, change the text, or change the color of shapes. In addition, you can:

- Name departments
- Set the vertical or horizontal orientation of departments
- Expand or shrink departments
- Reorder departments

- Move the location of department names

When you create departments for the first time in a diagram, you can set the department orientation and text orientation for headers. After you have created your departments, you edit them in the diagram space.



—Note —

When you create a process diagram, FlowCharter 2000 Professional inserts one department and a starting point by default.

To insert a department

- 1 On the **Insert** menu, click **Department**.
or
Click the **Department**  tool.
- 2 In the **Insert Departments** dialog box, click **Add**.
- 3 In the **Insert Department** dialog box, type a name for the department in the **New Department Name** field, and click **OK**.
- 4 Click **OK**.

To set the lane orientation of departments

- 1 Click the **Department**  tool.
- 2 Under **Department Orientation**, select **Horizontal** or **Vertical**.
- 3 Click **OK**.



—Note

You can only set the lane orientation of departments the first time you add departments to a diagram.

To set the text orientation of department labels

- 1 Click the **Department**  tool.
- 2 Under **Text Orientation**, select **Horizontal** or **Vertical**.
- 3 Click **OK**.



—Note

You can only set the text orientation of department labels the first time you add departments to a diagram.

To move the location of department names

- 1 In an active diagram, click a department label.
- 2 Click the right-mouse button, and click **Format Diagram**.
- 3 In the Process tab, select a name location from the **Department Name Area** list.
- 4 Click **OK**.

To add a color, pattern, or gradient to departments

- 1 In an active diagram, click a department label.
- 2 In the **Gallery**, click the **Fill** tab, select **Fill Color**, **Fill Pattern**, or **Fill Gradient**, and then click a color, pattern, or gradient.

To add borders and dividers to department lanes

- 1 In an active diagram, click a department label.
- 2 Click the right mouse button, and click **Format Diagram**.
- 3 Click the **Borders** and **Dividers** tab, and select the area you would like to apply borders or dividers from the list.
- 4 Select from the various line types, styles, widths, and colors available.
- 5 Click **OK**.

To edit text in department headers

- 1 Click the department header.
The cursor changes to a text cursor.
- 2 Delete the text, and type a new name.

To delete a department

Click the department header, and press **DELETE**.

To reorder departments

- 1 Click the department header that you want to move.
- 2 Click any area between the black squares (handles) on the gray hatched area.

The cursor changes to four arrows.

For horizontal departments, drag the department up or down to the desired position and drop.

For vertical departments, drag the department left or right to the desired position and drop.

To change lane margins and minimum lane size

- 1 In an active diagram, click a department label.
- 2 Click the right mouse button, and click **Format Diagram**.

- 3 Click the **Lanes** tab, and change the bottom margin, end margin, and minimum lane size.
- 4 Click **OK**.

Using Phases

You can use phases, or phase lines, to divide tasks across departments. Since departments already divide groups or units performing a task, phases help further separate these tasks into time or process oriented segments. For example, you may want to add three phases to a production diagram. One phase could be pre-production, the next, production, and the final phase, post-production. Phase lines provide the visual break for seeing which shapes (and tasks) occur during which phase.



—Note —

Phases work only with diagrams containing departments.

To insert a phase line

- 1 On the **Insert** menu, click **Phase**.
- 2 Depending on the orientation of your departments, drag the line horizontally or vertically to place the phase.
- 3 Click the left mouse button.

- 4 Repeat steps 1-3 to place additional phases.



—Note

You can resize or expand the phase by clicking on a black box handle and dragging the phase horizontally or vertically.

To format a phase line

- 1 Using the right mouse button, click a phase.
- 2 Click **Format Diagram**.
- 3 In the **Format Diagram** dialog box, click the **Phases** tab.
- 4 In the **Phase Name Area** list, click **No Name**, **Name on Top**, **Name on Bottom**, or **Name Top and Bottom**.
- 5 To change your end style to an arrow, select the button next to the arrow.
- 6 Click **OK**.



—Note

You can also change the border and divider line type, width, and color of phase lines. To do this, click the Borders and Dividers tab in the Format Diagram dialog box, and select Phase Line and/or Phase Divider in the Apply to list.

To label a phase line

- 1 Click the phase.
The pointer changes to a text cursor.
- 2 Click before the word “Phase” and continue to press **DELETE** until the text is deleted.
- 3 Type a new label.



—Note

You can also change the color of the phase. To do this using the right mouse button, click the phase, click Format, and choose a fill style and color.

To delete a phase line

- 1 Click the phase.
- 2 Press **DELETE**.

Working with Shapes and Lines

Using the Shape Library

The Shape Library is a custom collection of shapes that you can select. In the Shape Library, you can store shapes that you use most often. By default, the Shape Library has the Process shape already in it.

In the Shape Library you can:

- Add additional shapes
- Modify the properties of the shapes
- Remove shapes
- Duplicate shapes
- Change the order of the shapes (move up or down)
- Update shape properties

Any shapes defined with attributes and formatting that you add to a diagram become part of the Shape Library. Shapes that you add to the Shape Library using the **Toolbox** toolbar are also unique to each diagram. Saving a diagram saves the shapes that you add to the Library. Also, saving a diagram as a template is a good way to use an extensive Library more than once.



—Tip —

You can always copy shapes to the Shape Library directly from Share Media.

As you work with a saved diagram, you might find that you use some shapes more than others. In this case, you can have these shapes appear in the most convenient areas of the Shape Library. You also might want to organize related shapes together in the Library. You can easily arrange shapes any way you want by moving them up or down.

After you have added shapes to the Library, you can modify them by editing connect points, adding text layouts, adding VBA code, adding modeling properties, and changing default formats and fields.

To add a shape to the Shape Library

- 1 On the **Toolbox** toolbar, click the **More Shapes**  tool.



—Note —

This tool appears under the last shape you added in the Toolbox toolbar.

- 2 To open the **Shape Library** dialog box, click the **Shape Library** command on the flyout menu.
- 3 In the **Shape Library** dialog box, click **Add Shapes**.
- 4 Select a subject from the **Share Media** list.
- 5 Click the **Shape Palette**.
- 6 Use the scroll bar in the **Share Media** area to scroll through the shapes in the subject.
- 7 Click the shape you want to add, and then click Add.
- 8 To add more shapes, repeat steps 4 through 7.
- 9 Click **Close**.

To add a shape to the Toolbox toolbar

- 1 On the **File** menu, click **Shape Library**.
- 2 In the **Shape Library** dialog box, click the box to the left of the shape you want to add to the **Toolbox** toolbar.

- 3 Click **Close**.

To remove a shape from the Shape Library

- 1 On the **File** menu, click **Shape Library**.
- 2 In the **Shape Library**, click the shape you want to remove.
- 3 Click **Remove**.
- 4 Click **Close**.



—Note

You can only remove a shape from the Shape Library if it is not being used by the document.

To edit a shape in the Shape Library

- 1 On the **File** menu, click **Shape Library**.
- 2 In the **Shape Library**, click the shape you want to edit.
- 3 Click **Edit**.



—Tip

After you have added shapes to the Library, you can modify them by editing connect points, adding text layouts, adding VBA code, adding modeling properties, and changing default formats and fields.

- 4 In the **Edit Shape** dialog box, click **Symbol**.

- 5 In the **Edit Symbol** dialog box, click the tabs and make the changes.
- 6 Click **OK**.

To duplicate a shape in the Shape Library

- 1 On the **File** menu, click **Shape Library**.
- 2 In the **Shape Library**, click the shape you want to duplicate.
- 3 Click **Duplicate**.

You can duplicate shapes to edit the attributes and formatting so shapes that might look similar behave differently.

- 4 Click **Close**.

To arrange shapes in the Shape Library

- 1 Click the shape you want to move.
- 2 Click **Move Up** or **Move Down**.
- 3 Repeat steps 1 and 2 until the shapes are in the order you want.
- 4 Click **Close**.

Placing Shapes in a Diagram

Because you use many shapes when creating a diagram, several methods exist for placing shapes.

- Placing multiple shapes of the same type—You can place multiple shapes of the same type without having to select the same shape in the Shape Library again. To do this, place a shape in the diagram space, click anywhere in the diagram, and then place another shape.
- Placing multiple types of shapes—You can select each shape in the Shape Library one at a time to place in the diagram space.

You can place shapes in a diagram two ways:

- Using the Shape Library
- Using the Share Media Subject tabs



—Note

Double-clicking on a shape in the Toolbox toolbar lets you place multiple shapes of the selected type without having to place a shape, click in the diagram space, and then place another shape. You can point and click. This also makes the Finished button appear.

Shape Library

Placing shapes using the Shape Library requires using two toolbars:

Toolbox toolbar- This toolbar contains the process shape by default and any shapes you designated in the **Shapes Library** dialog box to appear on the toolbar. Click the arrow below the last shape to open the **More Shapes** flyout menu.

More Shapes toolbar- This toolbar contains the rest of the shapes you added to the diagram using Share Media. It also contains the **Shape Library** command for opening the **Shape Library** dialog box.

Share Media Subject tabs

The Gallery contains **Share Media Subject** tabs. You can place shapes in a diagram using these tabs. After you open Share Media and select a subject to create a tab, click the shapes and drag them to the diagram space. To open Share Media, click the **Shape Palettes**  tool on the **Standard** toolbar.

To place a shape using the Shape Library

- 1 Click the shape on the **Toolbox** toolbar or the **More Shapes** flyout menu that you want to place.
- 2 Click in the diagram where you want to place the shape.

To place a shape using the Gallery

- 1 Click a **Share Media Subject** tab in the Gallery.
- 2 Click a shape in the palette.
- 3 Click in the diagram.

Connecting Shapes with Lines

The type of line that you draw is indicated by the **Connector Lines** tool selected in the **Toolbox** toolbar. Select the line type that you want to draw by clicking the arrow under the **Connector Lines** tool, and then selecting the line from the flyout menu.

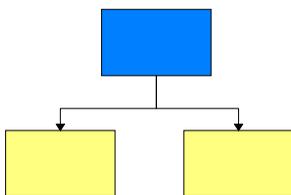
You can use any of the six line (routing) tools to connect shapes:

- Direct Line
- Right Angle Line
- Curved Line
- Org Chart Line
- Cause and Effect Line
- Lightning Bolt Line

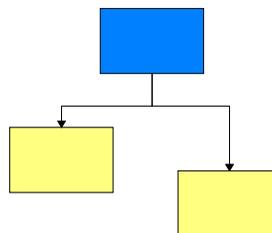
You can connect lines by dragging or clicking, and connect two shapes with a line. When you connect the shapes with a line, the end points of the line snap to the nearest connect points in the shapes.

Using Connector Lines

Connector lines automatically display and snap to points on closed shapes. After placing a connector line, you can easily detach it and reattach it at a different snap point. When you attach connector lines to a shape, you can move the shape and the lines remain attached.



The boxes in this chart are connected with connector lines.



The line remains connected to the box when the box is moved.

Setting Off-Page Connectors on Connector Lines

When working with large diagrams spanning many pages, you might want to use off-page connectors to keep shapes and lines organized. You can add an off-page connector to a line manually by using a right mouse on the line, and then clicking the **Format** command. In the **Format Line** dialog box, click the **Arrows and Crossovers** tab, and select the **Connectors** box.



—Note

In the **Format Line** dialog box, you can change the color and line style for a selected line.

You can also set automatic off-page connectors for all lines that break between pages. On the **Format** menu, click the **Diagram** command, and then click the **Off-Page Connectors** tab. In the **Off-Page Connectors** tab, you can set automatic connectors and choose options such as directional symbols and page numbering.

To connect two shapes by dragging

- 1 Make sure that you select the desired **Connector Lines**  tool in the **Toolbox** toolbar.
- 2 Point inside the first shape, press and hold the left mouse button, then drag the pointer to the side of the first shape where you want the line to begin.

- 3 Trace the path you want the line to follow by dragging the pointer to the side of the second shape where you want the line to end.
- 4 Release the mouse button.



—Note

Double-clicking on a line in the Toolbox toolbar lets you connect multiple lines of the selected type without having to click a line, connect a line, and then connect another line. You can point and draw. This also makes the Finished button appear.

You can also draw lines that connect to other lines or lines that remain unconnected. On the Tools menu, click Options, and then click the Connector Lines tab. Select the Allow lines to connect to other lines box and Allow unconnected lines box.

To connect two shapes by clicking

- 1 Click the **Connector Lines**  tool.
- 2 Click the side of the shape from which you want to start the line.
- 3 Without clicking the mouse, move the pointer to a connect point on the shape to which you want to connect the line.
- 4 Click the connect point.

A red box on both shapes indicates the connect points that you selected on each shape.

To move a line end from one connect point to another on a shape

- 1 Select a line connected to a shape.
Two red boxes appear on each end of the line.
- 2 Move the cursor over the line end that you would like to move to another point.
- 3 Click and hold the left mouse button down, and then move the line end to a new connect point
- 4 Release the left mouse button.

To edit connect points between shapes

- 1 In the **Shape Library** dialog box, select the shape you want to edit.
- 2 Click **Edit**.
- 3 Click **Symbol**.
- 4 In the **Edit** symbol dialog box, click the **Connect Points** tab.
- 5 Use the **Mode** or **Actions** options to add or delete connect points.

To connect two shapes using the Connect Shapes command

- 1 Click and hold the left mouse button down, and draw a bounding box around the shapes you want to connect.
- 2 Click the line type you want.

- 3 On the **Arrange** menu, click **Connect Shapes**.

To reverse line ends between shapes

- 1 Click and hold the left mouse button down, and draw a bounding box around the shapes with a line you want to reverse.
- 2 On the **Arrange** menu, click **Reverse Ends**.

To choose line routing types

- 1 Click the **Connector Lines**  tool.
- 2 Click the type of line you want. There is a tool for each type.



Direct Line



Right Angle Line



Curved Line



Org Chart
Line



Cause and Effect
Line



Lightning
Bolt



—Tip —

To define a frequently used line type and style combination, add a preset style.

To add a vertex to a line

- 1 Click either the direct line or the right angle line between two shapes.
- 2 Click the right mouse button, and then click **Add Vertex**.
An X appears on the line.
- 3 Slide the X on the line to the position you want.
- 4 Click the line.
A black box appears at the vertex point.
- 5 To create the new line bend, click and move the black box.
- 6 Release the left mouse button.



—Note

If you move connector lines manually, you can automatically restore them to their original position. To move lines back to their original position, right-mouse click on the line, and then click Route Line.

To restore automatic line routing

- 1 Right-mouse click the right angle connector line.
- 2 Click **Route Line**.
- 3 To finish the line move, click in the diagram space.

To add manual off-page connectors to a line

- 1 Click on a line.
- 2 Click the right mouse button, and click **Format**.
- 3 In the **Format Line** dialog box, click the **Arrows and Crossovers** tab, and then select the **Connectors** box.
- 4 Click **OK**.



Note

You can also set automatic off-page connectors for all lines that break between pages. On the **Format** menu, click the **Diagram** command. In the **Format Diagram** dialog box, click the **Off-Page Connectors** tab to set automatic connectors and choose options such as directional symbols and page numbering.

Formatting Shapes and Lines

Using the formatting options in FlowCharter 2000 Professional helps you create diagrams that look professional and communicate the message that you are trying to send.

Formatting options for shapes and lines appear on the **Format** menu, the **Formatting** toolbar, and the **Gallery**. You can also use the **Shape Library**, **Share Media**, and the **Defaults** tab on the **Format Diagram** dialog box to set formatting options.

Applying Fill Formats

You can use different colors and fill patterns to differentiate flows and to identify individual shapes. For example, you could use a cross-hatched gray fill to identify incomplete processes and a solid yellow fill to identify completed processes.

Applying Line and Border Formats for Shapes

You can choose different line styles for shape outlines. Shape lines include not only the outside part of a shape, but also any interior lines used in the shape and any exterior lines connected to a shape. There are many useful line styles for outlines, including solid, dashed, and center lines.

Applying Line Formats for Lines

You can use a number of styles for lines, including solid and dashed lines. Line styles are commonly used in flowcharts to convey the following information.

Line Style	Meaning
Solid lines with arrows	Show data flow.
Dashed lines	Represent multiple transitions and optional steps.

Center lines	Heavier weight lines that represent enclosure outlines or draw attention to a specific diagram element.
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You can choose different line weight and colors for each line and arrowhead. Varying line weights distinguish data flows and draw attention to certain transitions or data transfers in a diagram.

Applying Arrow and Crossover Formats

Arrowheads help indicate direction. FlowCharter 2000 Professional provides two ways to use directional line arrows:

- Source Arrows
- Destination Arrows

Many beginning and ending arrow styles exist for both source and destination ends. Try using color to enhance your diagram. You could use one color for all beginning arrowheads and another for all ending arrowheads.

With crossovers, you can set the style and size when lines cross over each other. You can choose from five different styles of crossovers. If you do not choose a crossover style, the lines cross with no indication, which can make it difficult to tell which lines connect to which shapes.

	Type	Description
	Bunny Hops	If the line is on top, it shows the hop; if it is on the bottom, it shows as a solid line.
	Broken Lines	If the line is on top, it shows as a solid line; if it is on the bottom, it shows as a broken line.
	Solid Lines	If the line is on top, it shows as a solid line; if it is on the bottom, it shows as a solid line. These cross with no indication.

You can specify the crossover style of individual lines. If you have a bunny-hop line over a broken line, both the bunny hop and the gap appear. If you have a bunny-hop line under a broken line, two solid lines appear. In general it is best to use one crossover style throughout your diagram.



—Tip —

When you draw a line that crosses any existing lines or shapes it goes over the lines or shapes. To send the line to the back, click it, click the Arrange tool on the Draw toolbar, point to Order, and then click Send To Back.

You set the style and size of crossovers by clicking **Line and Border** on the **Format** menu, clicking the **Arrows and Crossovers** tab, and then selecting the type and size you want. You also can choose the crossovers style by clicking the **Crossovers**  tool on the **Draw** toolbar, and then clicking the type you want.

Applying Shadow/3D Formats

You can use shadows and 3D formats as indicators for shapes. For example, shapes with shadows can indicate that a linked diagram exists from a shape. You can choose over ten positions for the 3D appearance of your shape.

To add a color, pattern, or gradient to a shape fill

- 1 Click the shape you want to fill in.
- 2 On the **Format** menu, click **Fill**.
- 3 In the **Format Shape** dialog box, click the **Fill** tab.
- 4 Select a solid, pattern, or gradient from the available styles.
- 5 Click **OK**.



—Tip

You can also use the Gallery to apply colors and styles.

To format lines for shape borders

- 1 In an active diagram, click the shape you want to format.
- 2 On the **Format** menu, click **Line and Border**.
- 3 Select from the various line types, styles, widths, and colors available.
- 4 Click **OK**.



—Tip

You can also use the Gallery to apply lines and borders.

To format lines

- 1 In an active diagram, click the line you want to format.
- 2 On the **Format** menu, click **Line and Border**.
- 3 Select from the various line types, styles, widths, and colors available.
- 4 Click **OK**.

To choose arrowhead styles

- 1 Click the line you want to add arrowheads to.
- 2 On the **Format** menu, click **Line and Border**.

- 3 In the **Format Line** dialog box, click the **Arrows and Crossovers** tab.
- 4 Choose either a **Source Arrow** line end, a **Destination Arrow** line end, or both.
- 5 Click **OK**.



—Note —————

You cannot change arrowhead styles on filled lines.

To choose a line crossover

- 1 Click the line you want to cross over another line.
- 2 On the **Format** menu, click **Line and Border**.
- 3 In the **Format Line** dialog box, click the **Arrows and Crossovers** tab.
- 4 Select a crossover style and size.
- 5 Click **OK**.

To add a shadow or 3D effect to a shape

- 1 Click the shape you want to add an effect to.
- 2 On the **Format** menu, click **Shadow/3D**.
- 3 Select **Shadow** or **3D**.
- 4 Select from the various styles, depths, and colors available.

- 5 Click **OK**.



—Tip

You can also use the Gallery to apply shadows and 3D effects.

To color a shadow

- 1 Click a shape.
- 2 On the **Format** menu, click **Shadow/3D**.
- 3 Select **Shadow**.
- 4 Select a color from the **Color** list.
- 5 Click **OK**.



—Tip

Click Apply to see the results of your changes without closing the dialog box.

To change a shadow depth

- 1 Click a shape.
- 2 On the **Format** menu, click **Shadow/3D**.
- 3 Select **Shadow**.
- 4 Select a new depth from the **Depth** list.

- 5 Click **OK**.



—Tip

Click Apply to see the results of your changes without closing the dialog box.

To change a shadow direction

- 1 Click a shape.
- 2 On the **Format** menu, click **Shadow/3D**.
- 3 Select **Shadow**.
- 4 Scroll through the **Style** box and select a new direction.
- 5 Click **OK**.



—Tips

Click Apply to see the results of your changes without closing the dialog box.

You also can use the Shadow tool on the Draw toolbar to change the shadow direction.

Manipulating Shapes and Lines Together

FlowCharter 2000 Professional uses several commands to organize the look and position of shapes in a diagram. You can find the following commands on the **Arrange** menu and in the **Draw** toolbar.

Align command

Command	Draw toolbar	Description
Left		Aligns the selected object or objects vertically based on their left edges.
Center		Aligns the selected object or objects vertically based on their centers.
Right		Aligns the selected object or objects vertically based on their right edges.
Top		Aligns the selected object or objects horizontally based on their top edges.
Middle		Aligns the selected object or objects horizontally based on their centers.
Bottom		Aligns the selected object or objects horizontally based on their bottom edges.

Make Same Size command

Command	Draw toolbar	Description
Width		Makes the selected object(s) the same size based on their width.
Height		Makes the selected object(s) the same size based on their height.
Both		Makes the selected object(s) the same size based on their width and height.
Fit to Text		Makes the selected object(s) the same size based on their text.

Space Evenly command

Command	Draw toolbar	Description
Across, Centers		Spaces the selected object or objects evenly across the diagram based on their centers.
Down, Centers		Spaces the selected object or objects evenly down the diagram based on their centers.
Across, Edges		Spaces the selected object or objects evenly across the diagram based on their edges.
Down, Edges		Spaces the selected object or objects evenly down the diagram based on their edges.

Rotate/Flip command

Command	Draw toolbar	Description
Rotate Right		Rotates the selected object or objects 90 degrees to the right.
Rotate Left		Rotates the selected object or objects 90 degrees to the left.
Angle		Selects the angle and direction for the object you want to rotate.
Flip Horizontal		Flips the selected object or objects horizontally.
Flip Vertical		Flips the selected object or objects vertically.

Order command

Command	Draw toolbar	Description
Bring to Front		Moves the selected object or objects in front of other objects in the diagram.
Send to Back		Moves the selected object or objects behind other objects in the diagram.
Send Backward		Moves the currently selected object one level toward the back.

Bring Forward		Moves the currently selected object one level toward the front.
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Combine command

Command	Draw toolbar	Description
Group		Groups selected objects.
Ungroup		Ungroups selected objects
Connect Closed		Connects the selected objects and closes any objects opened during the process.
Connect Open		Connects the selected open objects.
Disconnect		Disconnects the selected connected objects.
Join		Creates a new shape by joining the selected objects together.
Intersect		Creates a new shape from the intersection of the selected objects
Outline		Creates a new shape from the outline of the selected shapes.
Slice		Slices the selected closed shape with the selected open shape.

The Arrange menu also contains time-saving commands that turn multiple step operations into one step.

Command	Description
Connect Shapes	Connects selected shapes with a connector line.
Replace Shapes	Replaces a selected shape with a shape from Share Media or the Shape Library.
Reverse Ends	Reverses the line ends between two selected shapes.
Fit to Text	Fits a select shape to text typed in the shape.

To align objects

- 1 Click the objects you want to align.
- 2 On the **Arrange** menu, point to **Align**, and click **Left**, **Center**, **Right**, **Top**, **Middle**, or **Bottom**.



—Tips—

You can use the following shortcut keys for aligning shapes: Align Top (CTRL+SHIFT+4), Align Middle (CTRL+SHIFT+6), Align Bottom (CTRL+SHIFT+8), Align Left (CTRL+SHIFT+ 3), Align Center (CTRL+SHIFT+ 5), and Align Right (CTRL+SHIFT+ 7).

You can also use the align tools (Align Left, Align Center, Align Right, Align Top, Align Middle, or Align Bottom) on the Draw toolbar.

To make objects the same size

- 1 Click the objects you want to make the same size.
- 2 On the **Arrange** menu, point to **Make Same Size**, and click **Width, Height, Both**, or **Fit to Text**.

You can also use the **Make Same Size** tools on the **Draw** toolbar.

To space objects evenly

- 1 Click the objects you want to space evenly.
- 2 On the **Arrange** menu, point to **Space Evenly**, and click **Across, Centers; Down, Centers; Across, Edges**; or **Down, Edges**.

You also can use the **Space Evenly Across, Centers; Space Evenly Down, Centers; Space Evenly Across, Edges**; and **Space Evenly Down, Edges** tools.

To rotate an object

- 1 Click the object you want to rotate.
- 2 On the **Arrange** menu, point to **Rotate/Flip**, and click either **Rotate Right** or **Rotate Left**.

You can also rotate the object by clicking the **Rotate Right** tool or the **Rotate Left** tool on the **Draw** toolbar.

To rotate an object by angle

- 1 Click the object you want to rotate.
- 2 On the **Arrange** menu, point to **Rotate/Flip**, and click **Angle**.

To select the angle and direction for rotating an object

- 1 On the **Arrange** menu, point to **Rotate/Flip**, and click **Angle**.
- 2 Type a number to determine how much your object is rotated.
- 3 Select either clockwise or counter-clockwise for the rotation direction.
- 4 Click **OK**.

To flip an object

- 1 Click the object you want to flip.
- 2 On the **Arrange** menu, point to **Rotate/Flip**, and click either **Flip Horizontal** or **Flip Vertical**.

On the **Draw** toolbar, click either the **Flip Horizontal** tool or the **Flip Vertical** tool.

To bring an object to the front

- 1 Click the object you want to bring to the front.
- 2 On the **Arrange** menu, point to **Order**, and click **Bring to Front**.

- 3 The selected object appears in front of all overlapping objects.

To send an object to the back

- 1 Click the object you want to move to the back.
- 2 On the **Arrange** menu, point to **Order**, and click **Send to Back**. The selected object appears behind all overlapping objects.

To group objects

- 1 Click the shapes you want to group.
- 2 On the **Arrange** menu, point to **Combine**, and click **Group**.

To ungroup objects

- 1 Click the shapes you want to ungroup.
- 2 On the **Arrange** menu, point to **Combine**, and click **Ungroup**.

To connect closed objects

- 1 Click the closed objects you want to connect.
- 2 On the **Arrange** menu, point to **Combine**, and click **Connect Closed**.



—Tip —

You can also use the Connect Closed  tool on the Draw toolbar.

To connect open objects

- 1 Click the open objects you want to connect.
- 2 On the **Arrange** menu, point to **Combine**, and click **Connect Open**.



—Tip —

You can also use the Connect Open  tool on the Draw toolbar.

To disconnect objects

- 1 Click the object you want to disconnect.
- 2 On the **Arrange** menu, point to **Combine**, and click **Disconnect**.



—Tip —

You can also use the Disconnect  tool on the Draw toolbar.

To join objects

- 1 Click the objects you want to join.
- 2 On the **Arrange** menu, point to **Combine**, and click **Join**.



—Tip

You can also use the Join  tool on the Draw toolbar.

To outline objects

- 1 Click the objects you want to use to form your outline.
- 2 On the **Arrange** menu, point to **Combine**, and click **Outline**.



—Tip

You can also use the Outline  tool on the Draw toolbar.

To intersect objects

- 1 Click the objects you want to intersect.
- 2 On the **Arrange** menu, point to **Combine**, and click **Intersect**.



—Tip

You can also use the Intersect  tool on the Draw toolbar.

To slice objects

- 1 Click the open object and the closed object you want to use for the slice process.
- 2 On the **Arrange** menu, point to **Combine**, and click **Slice**.



—Note

Use the Slice command only when slicing an open object through a closed object. The Slice command is not available if you select two open objects. You can also use the Slice  tool on the Draw toolbar.

To replace shapes

- 1 Click the shapes in the diagram you want to replace.
- 2 On the **Arrange** menu, click **Replace Shapes**.
- 3 In the **Replace Shape** dialog box, find and click the shape you want to use as a replacement.
- 4 Click **Replace**.

5 Click OK.

Notes

Any manually resized shape or shape that has been fitted to text must be resized after you replace the shape.

When you replace shapes, the new shapes connect to the lines on the old shapes. The program automatically chooses the closest connect point on the new shapes.

FlowCharter 2000 Professional automatically preserves shape numbers, colors, borders, patterns, and text size when it replaces the shape.

To fit shapes to text

- 1 Click the text block or the shape that contains the text.
- 2 On the **Arrange** menu, click **Fit to Text**.



Tip

Press F8 to fit a shape or a text block to text.

Using Spacing Options Between Shapes

When you connect shapes with right angle lines, you can choose how far the line segments are offset from the shapes. This feature is useful if the line segments are too short or too long. Your choice affects only right angle lines. You can set the spacing options in the **Connector Lines** tab on the **Options** dialog box.

- **Horizontal Spacing**- The Horizontal shape spacing option lets you set the amount of horizontal space between lines and shapes.
- **Vertical Spacing**- The Vertical shape spacing option lets you set the amount of vertical space between lines and shapes.

To set the line spacing between shapes and lines

- 1 On the **Tools** menu, click **Options**.
- 2 If necessary, click the **Connector Lines** tab.
- 3 Click the **Horizontal** box, and type the distance you want between the shape and the first right angle of a horizontal line.

- 4 Click the **Vertical** box, and type the distance you want between the shape and the first right angle of a vertical line.



—Tips—

The measurements used (inches or centimeters) are displayed next to the box. These measurements apply to the whole diagram. To change the type of measurement used, right-click the ruler, and click the measurement type you want.

You can also create a toolbar with the inches and centimeters buttons. To do this, click Tools, click Customize, and click the View category. Click the buttons, drag them outside of the Customize dialog box, and drop them. (When you drop the second button, be sure it is more or less on top of the first button. That way, it gets added to the same toolbar instead of creating a second toolbar with one button in it.) Now that you have a toolbar with the inches and centimeter buttons, you can click them to change the unit of measurement.

Working with Default and Preset Shape and Line Styles

As you create diagrams, you can reuse the same shape and line styles. For example, you can use the same border style and fill pattern for decision shapes in a certain flow. You can choose the styles you want to reuse and store them in a list. These styles are called preset styles. After saving new preset shape and line styles, you can open them by clicking the **Shape Style** or **Line Style** lists on the **Preset Styles** toolbar.

You can set and apply shape and line defaults three ways:

- Defaults tab on the **Format Diagram** dialog box
- Preset shape and line styles
- **Shape Library** and **Share Media**

This list is arranged in order of override capabilities: Preset shape and line styles you create using the **Preset Styles** toolbar override shape and line settings you create using the **Defaults** tab. Defaults you create for individual shapes appearing in the **Shape Library** and **Share Media** override styles you create using the **Preset Styles** toolbar and defaults you create using the **Defaults** tab.

To set shape and line defaults using the Defaults tab

- 1 On the **Format** menu, click **Diagram**, and then click the **Defaults** tab.



—Note —

You can set several defaults in this tab. This procedure explains how to set one type.

- 2 Click the **Shapes** box, and then click **Fill**.
- 3 In the **Format Fill** dialog box, choose a fill style or a foreground color.
- 4 Click **OK**.
- 5 In the **Defaults** tab, click **OK**.

All shapes that you place in the diagram appear with the fill style and color you selected.

To create a new preset shape style

- 1 Click the **Edit Shape Styles**  tool on the **Preset Styles** toolbar.
- 2 In the **Preset Styles** dialog box, click **New**.
- 3 In the **Format Fill** dialog box, select the shape options that you want.
- 4 Click **OK**.
- 5 Type a new name for the shape style.
- 6 Click **OK**.
- 7 Click **OK**.

To add a preset shape style

- 1 Click the shape in the diagram.
- 2 Click the **Add Shape Style**  tool on the **Preset Styles** toolbar.

The shape is added to the **Shape Style** list.



—Tip

Click Toolbars on the View menu, and then click Preset Styles to display the Preset Styles toolbar.

To choose a preset shape style

- 1 Select the shape(s) to which you want to apply the style.
- 2 Click the **Shape Styles** list on the **Preset Styles** toolbar.
- 3 Click the shape style you want.



Notes

If no shape is selected, the preset style appears in the Sample tool and becomes the current shape style.

If you select a shape before you choose a shape style, the style is applied to the selected shape.

Click Toolbars on the View menu, and then click Preset Styles to display the Preset Styles toolbar.

To rename a preset shape style

- 1 Click the **Edit Shape Styles**  tool on the **Preset Styles** toolbar.
- 2 In the **Preset Styles** dialog box, click the preset shape style you want to rename, and click **Rename**.
- 3 Type a new name.
- 4 Click **OK**.

- 5 Click **OK**.



—Tip

Click **Toolbars** on the **View** menu, and then click **Preset Styles** to display the **Preset Styles** toolbar.

To delete a preset shape style

- 1 Click the **Edit Shape Styles**  tool on the **Preset Styles** toolbar.
- 2 In the **Preset Styles** dialog box, click the shape style you want to delete.
- 3 Click **Remove**.
- 4 Click **OK**.



—Tip

Click **Toolbars** on the **View** menu, and then click **Preset Styles** to display the **Preset Styles** toolbar.

To create a new preset line style

- 1 On the **Preset Styles** toolbar, click the **Edit Line Style**  tool.
- 2 In the **Preset Styles** dialog box, click the **Line** tab.
- 3 Click **New**.

- 4 In the **Format Line** dialog box, select the line options that you want.
- 5 Click **OK**.
- 6 Type a new name for the line style.
- 7 Click **OK**.
- 8 Click **OK**.

To add a preset line style

- 1 Click the line in the diagram.
- 2 Click the **Add Line Style**  tool on the **Preset Styles** toolbar.
The line style is added to the **Line Style** list.

To choose a preset line style

- 1 Select the line(s) to which you want to apply the style.
- 2 Select the **Line Styles** list on the **Preset Styles** toolbar.

- 3 Click the line style you want.



—Tips—

If no line is selected, the preset style becomes the current line style.

If you select a line before you choose a line style, the style is applied to the selected line.

You can also apply a new line style using the Preset Styles command on the Format menu.

To rename a preset line style

- 1 On the **Preset Styles** toolbar, click the **Edit Line Style**  tool.
- 2 In the **Preset Styles** dialog box, click the **Line** tab, and then click the preset style you want to rename.
- 3 Click **Rename**.
- 4 Type a new name.
- 5 Click **OK**.
- 6 Click **OK**.

To delete a preset line style

- 1 Click the **Edit Line Styles**  tool on the **Preset Styles** toolbar.
- 2 In the **Preset Styles** dialog box, click the line style that you want to remove.
- 3 Click **Remove**.
- 4 Click **OK**.

To set shape and line defaults using the Shape Library

- 1 On the **File** menu, click **Shape Library**.
- 2 In the **Shape Library** dialog box, select a shape in the **Shapes** list.
- 3 Click **Edit**.
- 4 In the **Edit Shape** dialog box, clear the **Use Diagram Default Format** box under **Shape Defaults**.
- 5 Click **Format**.



—Note

You can select several formatting options in the Format Shape dialog box. This procedure explains how to set one type.

- 6 On the **Fill** tab, select a fill style, and then click **OK**.
- 7 In the **Edit Shape** dialog box, click **OK**.

- 8 In the **Shape Library**, click **Close**.

To set shape and line defaults using Share Media

- 1 Click a **Share Media** subject tab in the **Gallery**.
- 2 Right-mouse click a shape, and then click **Properties**.
- 3 In the **Shape Properties** dialog box, click **Edit**.
- 4 In the **Edit Shape** dialog box, clear the **Use Diagram Default Format** box under **Shape Defaults**.
- 5 Click **Format**.
- 6 On the **Fill** tab, select a fill style, and then click **OK**.
- 7 In the **Edit Shape** dialog box, click **OK**.
- 8 In the **Shape Properties** dialog box, click **OK**.

Working with Shape Fields

In FlowCharter 2000 Professional you can use shape fields to expand the power of any selected shape. Inserting a field in a shape helps you attach extra functionality to a shape. It also helps users of your diagram understand that shapes with fields included give more information or perform special functions.

A shape field can be something simple like a date and time, or something more complex, like a Visual Basic expression. The **New Field** dialog box contains all the field type functions that you can include with a shape. This dialog box is dynamic. Depending on what field type you choose, more information appears on the right side of the dialog for selecting or changing. After choosing a field type, you can also position it at different places inside the shape or outside the shape's border.

To add a field to a shape

- 1 Click the shape you want to add a field to.
- 2 On the **Format** menu, click **Fields**.
- 3 In the **Shape Fields** dialog box, click **New Field**.
- 4 In the **Field Type** list, click the plus signs next to the field types, and click the field you want to insert.
- 5 Click **OK**.
- 6 In the **Shape Fields** dialog box, move the mouse pointer over the **Location** box. A black dot follows the pointer.
- 7 Click the field box within the outline of the shape.
- 8 While holding the left mouse button down, move the field box to the desired position.
- 9 Release the left mouse button.
- 10 Click **OK**.

To move a shape field in or around a shape

- 1 Click the shape that contains the shape field.
- 2 On the **Format** menu, click **Fields**.
- 3 In the **Shape Fields** dialog box, move the mouse pointer over the Location box. A black dot follows the pointer.
- 4 Click the field box within the outline of the shape.
- 5 While holding the left mouse button down, move the field box to the desired position.
- 6 Release the left mouse button.
- 7 Click **OK**.

To include a shape field description with a shape

- 1 Click the shape that contains the shape field.
- 2 On the **Format** menu, click **Fields**.
- 3 In the **Shape Fields** dialog box, select **Include Description**.
This places the name of the shape field you use before the actual shape field. For example, if you include a field code for page number, PageNumber: appears prior to the page number with the selected shape.
- 4 Click **OK**.

To set the text orientation for a shape field

- 1 Click the shape that contains the shape field.
- 2 On the **Format** menu, click **Fields**.
- 3 In the **Shape Fields** dialog box, select one of the text orientations under the **Location** box.
- 4 Click **OK**.

To set advanced shape field options

- 1 Click the shape that contains the shape field.
- 2 On the **Format** menu, click **Fields**.
- 3 In the **Shape Fields** dialog box, click **Advanced**.

To wrap the shape field description, select **Limit Text Width** and change the **Width**.

To hide the shape field from view in or around the shape, select **Hide Text**.

To prevent a shape's field text string from being updated if the field type is changed, select **Freeze Text**.

To delete a shape field

- 1 Click the shape that contains the shape field.
- 2 On the **Format** menu, click **Fields**.
- 3 In the **Shape Fields** dialog box, click **Delete**.

Numbering Shapes

FlowCharter 2000 Professional has several options for numbering and renumbering shapes in a diagram. You can apply numbering commands to individual shapes, all shapes in a diagram, new shapes that you place, or existing shapes in a diagram.

Using numbering commands you can:

- Show or hide shape numbers
- Automatically number shapes
- Manually number shapes
- Change the default number format
- Set an area in a shape where you would like the number to appear



—Note —

Shape numbering is turned off by default. Before you can make any changes to shape numbers, you must select a shape and show its shape number, or for all shapes, show all shape numbers.

To show or hide numbers on all shapes

On the **Format** menu, point to **Numbering**, and click **Show All Shape Numbers** or **Hide All Shape Numbers**.



—Note

This feature only affects shapes numbered with the Numbering feature. If you type a number as text in the shape, the number will not be shown or hidden using this method.

To show or hide numbers on selected shapes

- 1 Select the shapes whose number you want to show or hide.
- 2 On the **Toolbox** toolbar, click the **Shape Numbering**  tool.
- 3 Click **Show Shape Number** or **Hide Shape Number**.

To renumber all shapes automatically

- 1 On the **Format** menu, point to **Numbering**, and click **Auto Renumber**.
- 2 In the **Automatic Renumber** dialog box, select **All Shapes**.
- 3 Type a starting number in the **Starting Number** dialog box.
- 4 Select a renumber style.
- 5 Click **OK**.

To renumber selected shapes automatically

- 1 Select the shapes in the diagram you want to renumber.
- 2 On the **Format** menu, point to **Numbering**, and click **Auto Renumber**.
- 3 In the **Automatic Renumber** dialog box, select **Selected Shapes**.
- 4 Type a starting number in the **Starting Number** box.
- 5 Click **OK**.

To renumber shapes manually

- 1 On the **Format** menu, point to **Numbering**, and click **Manual Renumber**. The pointer changes to the **Number** pointer when you move it into the drawing area.
- 2 In the **Renumber** dialog box, type the next number you want displayed.
- 3 Click the first shape in the diagram you want to renumber.
- 4 Click the other shapes in the order you want them renumbered.
- 5 In the **Renumber** dialog box, click **Finished**.

To set the default number format for new shapes

- 1 On the **Format** menu, point to **Numbering**, and click **Default Number Format**.
- 2 In the **Shape Fields** dialog box, click **Format**.
- 3 In the **Numbering Format** dialog box, select a new example number from the **Example Number** list.



—Note

You can also type your own numbering schemes directly in this list.

- 4 If you selected a two-part example number, click either the left or right number or letter to increment.
- 5 Click **OK** to close the **Numbering Format** dialog box.
- 6 Click **OK**.

To change the number format for existing shapes

- 1 On the **Format** menu, point to **Numbering**, and click **Number Format**.
- 2 In the **Shape Fields** dialog box, click **Format**.
- 3 In the **Numbering Format** dialog box, select a new example number from the **Example Number** list.
- 4 If you selected a two-part example number, click either the left or right number or letter to increment.

- 5 Click **OK** to close the **Numbering Format** dialog box.
- 6 Click **OK**.

To set the numbering position in a shape

- 1 On the **Format** menu, point to **Numbering**, and click **Default Number Format**.
- 2 In the **Shape Fields** dialog box, move the mouse pointer over the **Location** box. A black dot follows the pointer.
- 3 Click the field box within the outline of the shape.
- 4 While holding the left-mouse button down, move the field box to the desired position.
- 5 Release the left-mouse button.
- 6 Click **OK**.

Using Auto Layout

Auto Layout is a feature specific to iGrafx Process 2000 that helps you choose the most logical shape positions and line routings for your diagram. The result is a clean and concise layout that helps you and your audience visualize and understand an illustrated concept.

Using Auto Layout you can:

- Specify what style you want to apply to your diagram
- Choose and create specific schemes

Auto Layout provides four different styles to choose from:

- Hierarchical
- Orthogonal
- Circular
- Symmetric

After you choose a specific style for your diagram, you can further manipulate the look of your document by using the **Advanced Options** button on the **Auto Layout** dialog box.

Choosing an Auto Layout Style

Some thought should go into choosing an Auto Layout style. Each style has specific properties and tailoring capabilities that can add or detract from a diagram depending on what you are trying to illustrate. Below is a general description of each style.

Style	Description
Hierarchical Style	<p>The hierarchical style works by grouping your diagram into a set of levels. These levels can be horizontal or vertical depending on the look you are trying to achieve.</p> <p>Hierarchical diagrams are useful when creating a number of different diagrams. A few include:</p> <ul style="list-style-type: none">• Process modeling• Project Management• Work-flow• Networking• Telephony

<p>Orthogonal Style</p>	<p>The orthogonal style works by producing a diagram in which all edges run parallel to the (x, y) axis. Auto Layout achieves the orthogonal style by building the diagram on an invisible grid.</p> <p>Orthogonal diagrams are most useful in producing clear, concise diagrams that do not show inherent hierarchical structures. Some examples include:</p> <ul style="list-style-type: none"> • CAD diagrams • OOA/OOD diagrams • Electrical diagrams • CASE diagrams
<p>Circular Style</p>	<p>The circular style is designed to layout diagrams representing networks, and is most useful when designing diagrams for:</p> <ul style="list-style-type: none"> • Network management • Social networking • Criminology • www visualization

Symmetric Style	<p>The symmetric style works by producing a layout that emphasizes the symmetries specific to a diagram.</p> <p>Symmetric diagrams are useful in designing layouts of:</p> <ul style="list-style-type: none">• Wide-area networks• Database schemata• Semantic networks
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To apply hierarchical style

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 Select **Hierarchical**.
- 3 Click **OK**.



—Note

The hierarchical style is preset (defaults) to set up your diagram in proper hierarchical layout. To change this, use the advanced settings. However, it is recommended that you use the proper hierarchical layout option.

To apply orthogonal style

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 Select **Orthogonal**.

- 3 Click **OK**.

To apply circular style

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 Select **Circular**.
- 3 Click **OK**.

To apply symmetric style

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 Select **Symmetric**.
- 3 Click **OK**.

To use advanced auto layout settings

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 Select the style you want to apply to your diagram.
- 3 Click **Advanced**.
- 4 Make any changes in options necessary.



—Tip —

To retrieve more information on manipulating a specific style, click **Help** in the **Advanced Auto Layout** dialog box.

- 5 Click **OK**.

- 6 Click **OK**.

To save auto layout settings as a scheme for future use

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 Select the style you want to apply to your diagram (hierarchical, orthogonal, circular, or symmetric).
- 3 Make any necessary changes in advanced settings.
- 4 Click **OK**.
- 5 Click **Save As**.
- 6 In the **Save Scheme** dialog box, type a name for your scheme.
- 7 Click **OK**.
- 8 Click **OK**.

To select an auto layout scheme

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 In the **Schemes** list, click a scheme.
- 3 Click **OK**.

To delete an auto layout scheme

- 1 On the **Arrange** menu, click **Auto Layout**.
- 2 In the **Schemes** list, click the scheme you want to delete.
- 3 Click **Delete**.

4 Click **OK**.

Working with Text

Creating and Manipulating Text

Five types of text exist in FlowCharter 2000 Professional:

Text Type	Description
Shape	Text that you type directly in a shape. As you type text, the shape automatically resizes to fit the text. You can use the shape text to describe only that shape.
Department Name	Text that you type directly in department headers.
Connector Line	Decision - Text generated from selections in the Properties dialog box. You cannot delete this text in the diagram space. Direct - Text that you create by selecting a line and typing on it.
General	Graphic - Text that you type directly in graphic. Direct - Text that you create by clicking the Text tool on the Toolbox toolbar, clicking in the diagram space, and then typing.
Field	Text that appears as a field in or around a shape.

You can:

- Create freeform text, shape text, and text on lines.
- Create and format callout lines.
- Set the formatting style for text.
- Set the alignment of a text block.
- Create and set tab sizes.
- Set the text orientation.
- Align text.
- Make text a bulleted list and set the bullet style and spacing.
- Rotate text.
- Make text opaque.
- Set tab spacing.
- Modify line spacing between paragraphs, and set the spacing units.
- Increase or decrease text indentation.

New Text Features

FlowCharter 2000 Professional includes the following new text manipulation features:

- Shapes automatically adjust to the text you type.
- When you click a shape, you can automatically begin typing text into the shape.
- You can add multiple text fields to a shape.

You have more formatting options for text in a diagram. You can:

- Make the text a bullet list.
- Set tab spacing.
- Modify line spacing between paragraphs.
- Increase or decrease text indentation.
- Set the text orientation.

You have more formatting features that you access directly from the **Formatting** toolbar. You can:

- Rotate text blocks.
- Make text opaque.
- Increase and decrease indents and line spacing in text blocks.

To create shape text

- 1 Click within the shape that you want to add text to.
- 2 Type the text you want in the shape. To start a new line, press **ENTER**.
- 3 When you finish typing, click outside the shape.

To edit text in department headers

- 1 Click the department header.
The pointer changes to a text cursor.
- 2 Delete the text, and type a new name.

To create text in the diagram space

- 1 Click the **Text**  tool on the **Toolbox** toolbar.
- 2 Click in the diagram space, and type.
- 3 When you finish typing, click away from the text.

To add text to a graphic

- 1 Double-click the graphic.
- 2 Type the text in the graphic.
- 3 To make the text appear in the graphic, click outside of the text box.



—Tip

You can also use the right mouse menu and click Add Text.

To create text on lines

- 1 Select the line.
- 2 Type the text you want. To start a new line, press **ENTER**.

- 3 When you finish typing, click outside the text block.



—Note

You can have text appear next to lines instead of on lines. On the Tools menu, click Options, and then click the Connector Lines tab. Under Default Text Line Style, click Next to the line. Text typed on a line will appear next to it.

To select text

Click the shape or text block you want.



—Tips

To select more than one object, Press SHIFT and click.

FlowCharter 2000 Professional applies any text options you choose to all the text in the selected objects.

To place the text cursor in text

- 1 Click the shape (including the text block) that contains the text you want to change.
- 2 Point the cursor inside the text you want to change.

To select text by dragging

- 1 Click the shape (including the text block) that contains the text you want to change.
- 2 Click at the beginning of the text you want to select.
- 3 Click and hold the left mouse button, and drag across the text you want. To select multiple lines of text, drag up or down.
- 4 Release the mouse button when you are finished.

To move the text cursor using the keyboard

- 1 Select the object containing the text.
- 2 Click to place the text cursor where you want.
- 3 Press the right or left arrow keys to move the text cursor one character at a time. Press **CTRL+ right arrow** or **CTRL+left arrow** to move the cursor one word at a time. To move the cursor one line, press the up or down arrow keys.

To select text using the keyboard

- 1 Select the object containing the text.
- 2 Click to place the text cursor at the beginning of the text you want.
- 3 Press and hold the **SHIFT** key.

- 4 Press the right or left arrow keys to select one character at a time. Press **CTRL+right arrow** or **CTRL+left arrow** to select one word at a time. To select one line up or down from the text cursor, press the up or down arrow keys.
- 5 Release the **SHIFT** key when you are finished.

To delete text

- 1 Select the object containing the text.
- 2 Click to place the text cursor where you want to begin deleting text.
- 3 To delete text to the left of the text cursor, press **BACKSPACE**. To delete text to the right of the cursor, press **DELETE**.

Formatting Text

You can choose styles for text in a diagram. Diagram text consists of anything you type in the diagram space, in a shape, in a department, in a graphic, or on a line.

Text Appearance

Formatting text includes changing the way the text looks. By changing a font size or color, you change the way text appears on the screen or in a printed diagram.

Text Functionality

Formatting text also determines how text relates to other text. Adding bullets and line indents to a text block helps it look different from other text in a diagram. Secondary text areas in shapes create space for separate pieces of information.

Text formatting commands appear on the **Format** menu. You can also find formatting tools and options on the **Formatting** toolbar and in the Gallery.

To choose text styles

- 1 Select the text you want to change.
- 2 On the **Format** menu, click **Font**.
- 3 In the **Format Text** dialog box, scroll through the font list, and select the font you want.
- 4 To change the font size, scroll through the size list and select the size you want.
- 5 To turn text effects on or off, select the box next to **Bold**, **Italic**, **Underline**, and **Strikethrough**. (You can select more than one.)
- 6 To change the text color, select the **Color** list and select a color.
- 7 To set the background of the text to opaque, select the **Opaque** box.

- 8 Click **OK**.



—Note —

To format field text, click the Fields command on the Format menu, select the field, and click Font.

To set bullet styles for text

- 1 On the **Format** menu, click **Text Alignment**.
- 2 In the **Format Text** dialog box, click the **Paragraph** tab, and select the bullet style from the **Bullet Style** list.
- 3 Type the number of tabs for the bulleted text list to move to the right in the Indents box.



—Notes —

You can also use the Bullets  tool on the Formatting toolbar.

Set the tab spacing (size) in the Block tab.

- 4 Click **OK**.

To set the line spacing for text

- 1 On the **Format** menu, click **Text Alignment**.
- 2 In the **Format Text** dialog box, click the **Paragraph** tab.

- 3 Under **Interline Spacing**, select the number of lines to space in the **Spacing** box, and select **Lines** or **Points** from the **Spacing Units** list.
- 4 Click **OK**.
You can also use the **Decrease Line Spacing** and **Increase Line Spacing** tools on the **Formatting** toolbar.

To set text margins inside shapes

- 1 Click the shape.
- 2 On the **Format** menu, click **Text Layout**.
- 3 Select **Shape Default**, **Fixed**, or **Percentage** from the **Shape Margins** list.
- 4 Type the shape margins for the top, bottom, left, and right.
- 5 Click **OK**.

To add secondary text areas to a shape

- 1 Click the shape.
- 2 On the **Format** menu, click **Text Layout**.
- 3 In the **Format Text Layout** dialog box, click **Add**.
- 4 Click **Left**, **Top**, **Right**, or **Bottom**.
The secondary text area appears as the box with the solid border around it in the preview shape.
- 5 In the **Size** box, select the size of the text area.

- 6 Click **OK**.



—Note

You can also format secondary areas in the Format Text Area dialog box by clicking **Format** under **Selected Text Area**.

To delete secondary text areas from a shape

- 1 Click the shape.
- 2 On the **Format** menu, click **Text Layout**.
- 3 In the **Format Text Layout** dialog box, click the secondary text area in the preview shape you want to remove.
- 4 Click **Remove**.
- 5 Click **YES**.

To align text blocks

- 1 On the **Format** menu, click **Text Alignment**.
- 2 In the **Format Text** dialog box, click the **Block** tab.
- 3 To change the horizontal block alignment, click **Left**, **Center**, or **Right**.
- 4 To change the vertical block alignment, click **Top**, **Middle**, or **Bottom**.
- 5 Click **OK**.

To set text orientation

- 1 On the **Format** menu, click **Text Alignment**.
- 2 In the **Format Text** dialog box, click the **Block** tab.
- 3 Under **Text Orientation**, click the direction you want your text oriented.
- 4 Click **OK**.

To rotate text without the shape

- 1 Click the text block or shape that contains the text you want to rotate.
- 2 Click the **Rotate Text Left**  or **Rotate Text Right**  tool on the **Formatting** toolbar.
- 3 Repeat step 2 to continue rotating the text until it is in the position you want.
- 4 Click outside the text area.

To rotate text with a shape

- 1 Select the text you want to rotate.
- 2 On the **Arrange** menu, click **Rotate/Flip**, and then click **Rotate Right**, **Rotate Left**, or **Angle**.

Working with Default and Preset Text Styles

As you create diagrams, you can reuse the same text defaults and styles. For example, you can set a default for text appearing only in shapes, and another default for text appearing on connector lines. Setting defaults for different types of text helps the creator and users of a diagram understand that text can be used for more than labeling purposes.

You can set and apply text defaults three ways:

- Defaults tab on the **Format Diagram** dialog box
- Preset text styles
- **Shape Library** and **Share Media**

This list is arranged in order of override capabilities: Preset text styles you create using the **Preset Styles** toolbar override text settings you create using the **Defaults** tab. Defaults you create for individual shapes appearing in the **Shape Library** and **Share Media** override styles you create using the **Preset Styles** toolbar and defaults you create using the **Defaults** tab.

To set text defaults using the Defaults tab

- 1 On the **Format** menu, click **Diagram**, and then click the **Defaults** tab.



—Note

You can set several defaults in this tab. This procedure explains how to set one type.

- 2 Click the **Shapes** box, and then click **Font**.
- 3 In the **Format Text** dialog box, choose a font from the **Font** list.
- 4 Click **OK**.
- 5 In the **Defaults** tab, click **OK**.

All new shapes created will have the default font style applied.

To add a preset text style

- 1 Select the text with the styles you want (font, size, style, and color).
- 2 On the **Preset Styles toolbar**, click the **Add Text Style**  tool.



—Tips

To display the Preset Styles toolbar, use a right mouse click in a toolbar area, and click Preset Styles.

To apply a preset text style

- 1 Select the text you want to apply the style to.
- 2 On the **Preset Styles** toolbar, select a style from the **Text Styles** list.

To rename a preset text style

- 1 Click the **Edit Text Style**  tool on the **Preset Styles** toolbar.
- 2 In the **Preset Styles** dialog box, click the style you want to rename.
- 3 Click **Rename**.
- 4 In the **Rename Style** dialog box, type the new name.
- 5 Click **OK**.
- 6 In the **Preset Styles** box, click **OK**.

To delete a preset text style

- 1 Click the **Edit Text Style**  tool on the **Preset Styles** toolbar.
- 2 In the **Preset Styles** dialog box, click the text style you want to delete.
- 3 Click **Remove**.
- 4 Click **OK**.

To set text defaults using the Shape Library

- 1 On the **File** menu, click **Shape Library**.
- 2 In the **Shape Library**, select a shape in the **Shapes** list.
- 3 Click **Edit**.
- 4 In the **Edit Shape** dialog box, clear the **Use Diagram Default Format** box under **Shape Defaults**.
- 5 Click **Format**, and select **Font**.



—Note

You can select several formatting options in the Format Text dialog box. This procedure explains how to set one type.

- 6 On the **Font** tab, select a font from the **Font** list, and then click **OK**.
- 7 In the **Edit Shape** dialog box, click **OK**.
- 8 In the **Shape Library**, click **Close**.



—Note

New shapes added to the diagram space using this shape will default to this text style.

To set text defaults using Share Media

- 1 Click a Share Media subject tab in the Gallery.
- 2 Right-mouse click a shape, and then click **Properties**.
- 3 In the **Shape Properties** dialog box, click **Edit**.
- 4 In the **Edit Shape** dialog box, clear the **Use Diagram Default Format** box under **Shape Defaults**.
- 5 Click **Format**, and select **Font**.
- 6 On the **Font** tab, select a font from the **Font** list, and then click **OK**.
- 7 In the **Edit Shape** dialog box, click **OK**.
- 8 In the **Shape Properties** dialog box, click **OK**.



—Note —

New shapes added to the diagram space using this shape will default to this text style.

Drawing Graphics

Understanding Differences between Graphics and Shapes

Understanding the differences between a graphic and a shape helps you use shapes more effectively. In FlowCharter 2000 Professional, graphics and shapes serve different purposes: Shapes are intelligent and graphics serve as helpers.

The following table describes some differences between graphics and shapes:

Graphics	Shapes
Draw using Draw Tool options.	Place using the Toolbox toolbar or the Gallery.
Do not use connector lines. Use callout lines to attach graphics to other objects.	Use connector lines to connect between shapes. Connect lines from other shapes to them.
Not intelligent. Cannot add fields, custom data, VBA code, and other shape properties.	Intelligent. Add fields, custom data, and VBA code.

Things you can do with graphics include:

- Adding text
- Reshaping
- Rotating
- Attaching to shapes using callout lines
- Converting to a shape

As helpers, graphics can add value to shapes by describing what the shape is and why it is in the diagram. For example, you can use callout lines to attach a note (a graphic with text) to a shape. Callout lines attached to shapes from graphics move together as one unit. If you move the shape, the graphic moves with it.

Drawing Graphics

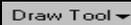
FlowCharter 2000 Professional contains several options for drawing graphical shapes and lines. These options include:

- Square
- Rounded Square
- Rectangle
- Rounded Rectangle
- Circle
- Ellipse
- Polygon
- Smoothed Polygon

- Jointed Line
- Curved Line

All graphics have the same attributes. After drawing a graphic, handles (black boxes) appear around it and a red square appears inside of it.

To open the **Draw** toolbar, click the **Draw**  tool on the **Standard** toolbar.

To view drawing options, click the **Draw**  tool on the **Draw** toolbar.

When you click a graphic option from the **Draw** tool, the pointer changes to intersecting lines with a small icon of the graphic. You can draw as many graphics as you want while the pointer is displayed.



—Tip —

You can also tear off the Draw tool and move it into the diagram space by clicking the Draw tool and moving the pointer to the gray bar at the top of the flyout. When the bar changes from gray to your system-defined color, click and hold down the left mouse button and drag the flyout to the diagram space. After you tear off the Draw tool, you can double click a graphic to draw multiple graphics of the same type. When you finish drawing the graphics, click the Finished button.

To draw a graphic

- 1 On the **Draw** toolbar, click the **Draw**  tool.
- 2 Click a draw option.
- 3 Move the pointer to the diagram space, press the left mouse button and drag down and to the right.
- 4 Release the left mouse button.

Manipulating Graphics

After drawing a graphic, you can move it or resize it. You can also arrange and combine a series of graphics. Graphics share some of the same features as shapes such as adding text and rotating. You can also reshape a graphic using points and convert a graphic to a shape.

To add text to a graphic

- 1 Double-click the graphic.
- 2 Type the text in the graphic.
- 3 To make the text appear in the graphic, click outside of the text box.



—Tip

You can also use the right mouse menu and click Add Text.

To move a graphic

- 1 Click the graphic.
- 2 Move the pointer to the gray hatched area surrounding the graphic.

The pointer changes to four arrows.

- 3 Click the gray hatched area and drag the graphic to a new position.
- 4 Release the mouse button.

To resize a graphic

- 1 Click the graphic.
- 2 Click any of the black squares surrounding the graphic.



—Note

To resize the graphic proportionally, click any one of the corner squares.

- 3 Without releasing the mouse button, drag the square.
- 4 Release the mouse button.
- 5 Click outside of the graphic.

To rotate a graphic

- 1 Click the graphic.
- 2 On the **Draw** toolbar, click the **Rotate**  tool.
The pointer changes to four arrows in a circle and four green circles appear on each corner of the graphic.
- 3 Click one of the green circles.
- 4 Without releasing the left mouse button, rotate the graphic to the desired position.
- 5 Release the left mouse button, and then click the **Finished** button.

To reshape a graphic

- 1 Select the graphic.
- 2 On the **Draw** toolbar, click the **Reshape**  tool.
The pointer changes to a white arrow. When you move the pointer over a reshape point (white circle), it changes to a black arrow.
- 3 Click one of the white circles.
- 4 Without releasing the left mouse button, drag the reshape point to a new position.

- 5 Release the left mouse button, and then click the **Finished** button on the **Reshape** toolbar.



—Note

When you click the Reshape tool, the Reshape toolbar opens. You can use the tools on the Reshape toolbar to edit the curve of the shape, add reshape points to the shape, or remove reshape points from the shape.

To convert a graphic to a shape

- 1 Click the graphic.
- 2 On the **Arrange** menu, point to **Convert to**, and click **Shape**.



—Note

You can also convert a shape to a graphic. When you convert a shape to a graphic, any data attached to the shape, such as field codes, VBA, or other shape properties, is lost.

Drawing Callout Lines

Graphics used as notes or descriptions help highlight important information about shapes in a diagram. You can attach graphics as notes to shapes using callout lines. You can also attach graphics to connector lines or other graphics. After you attach a graphic to a shape using a callout line, its position is relative to the shape. If you reposition the shape in the diagram, the graphic moves with it.

To connect a callout line to a shape from a graphic

- 1 Click the graphic.
- 2 Move the pointer over the red square in the graphic
The pointer changes to a white arrow.
- 3 Click the red square.
- 4 Without releasing the left mouse button, drag the line from the red box to the shape.
- 5 Release the left mouse button.
A red box appears on the shape where the callout line is connected.
- 6 Click outside of the shape.

To format a callout line

- 1 Click the graphic with a callout line attached to it.
- 2 On the **Format** menu, click **Callout Line**.
- 3 In the **Format Callout Line** dialog box, select formatting options in the **Line** tab.
- 4 To add an arrow to the line and change arrow formatting, click the **Arrow** tab.

5 Click OK.



—Tip

If you want to view lines connecting graphics to shapes, click the Hidden Lines command on the View menu.

Organizing Diagrams

Working with Diagram Types and Components

Creating multiple components and saving them in a document is a good way to organize, package, and store similar information. You can create three separate component types using FlowCharter 2000 Professional:

- **Diagrams-** Basic Diagrams contain shapes, lines, graphics, and text describing ideas or functions. Process Diagrams contain shapes, connector lines, departments, other graphics and text. In process diagrams you can add modeling data that can be used with iGrafx Process 2000 when simulating a process.
- **Scenario-** Contains set up information for simulating a process using iGrafx Process 2000.
- **Report-** Contains the results of simulating a process using iGrafx Process 2000.



—Note

Scenario and Report components are used with iGrafx Process 2000. If you used iGrafx Process 2000 to run a simulation, you can select and view scenario and report data in FlowCharter 2000 Professional.

For any diagram, you can create or add, view, delete, rename or copy/paste components. You can also add a component using a saved template.

To create a new component

- 1 On the **File** menu, click **Components**.
- 2 In the **Components** dialog box, click **New**, and click **Process**, **Basic Diagram**, **Scenario**, or **Report**.



—Note

You can only create a scenario or report if you have one process in your document.

- 3 Click **Close**.

To create a new component from a template

- 1 On the **File** menu, click **Components**.
- 2 In the **Components** dialog box, click **New**, and click **New From Template**.
- 3 In the **New Component From Template** dialog box, browse for the template you want to use.
- 4 In the **Template Component** box, click the component.
- 5 If necessary, type a new name in the **Name** box, and then click **OK**.
- 6 In the **Components** dialog box, click **Close**.

To view a component

- 1 On the **File** menu, click **Components**.
- 2 In the **Components** dialog box, click **All Components**, **Diagram Hierarchy**, or **Diagrams by Contained Departments**.
- 3 In the tree hierarchy, click the “+” symbol to expand the components.
- 4 Click the component you want to view.
- 5 Click **View**.
- 6 Click **Close**.



—Tip

All Components lists diagrams, reports, and scenarios. Diagram hierarchy lists only diagrams. Diagrams by Contained Departments lists diagrams within departments.

To delete a component

- 1 On the **File** menu, click **Components**.
- 2 In the **Components** dialog box, click **All Components**, **Diagram Hierarchy**, or **Diagrams by Contained Departments**.
- 3 If necessary, click the “+” symbol to expand the components.
- 4 Click the component you want to delete.

5 Click **Delete**.

6 Click **Close**.

To rename a component

1 On the **File** menu, click **Components**.

2 In the **Components** dialog box, click **All Components**, **Diagram Hierarchy**, or **Diagrams by Contained Departments**.

3 If necessary, click the “+” symbol to expand the components.

4 Click the component you want to rename.

5 Click **Rename**.

6 Type the new name over the existing name.

7 Click outside of the text box.

8 Click **Close**.

To copy and paste a component from one document to another

1 On the **File** menu, click **Components**.

2 In the **Components** dialog box, click **All Components**, **Diagram Hierarchy**, or **Diagrams by Contained Departments**.

3 In the tree hierarchy, click the “+” symbol to expand the components.

- 4 Click the component you want to copy, and then click **Copy**.



—Note

You can select multiple components for copying by pressing SHIFT and clicking the components.

- 5 Click **Close**.
- 6 On the **File** menu, click **Open**, navigate to another document, and then click **OK**.
- 7 On the **File** menu, click **Components**.
- 8 In the **Components** dialog box, click **Paste**.
The original copied components now appear in the dialog box.
- 9 Click **Close**.

To convert a basic diagram to a process

With a basic diagram open, point to **Change Diagram Type** on the **Tools** menu, and click **Process**.



—Note

If you convert a process to a basic diagram, you will lose modeling data.

Working with Layers

With FlowCharter 2000 Professional, you can organize your diagrams in layers. You can place some objects on one layer and others on another layer such as layering several overhead transparencies.

Layers help you do the following:

- Manage complex diagrams with many overlapping objects.
- Categorize objects that logically belong together by layer.
- View certain objects in your drawing while hiding others.
- Easily select and change objects.
- Protect objects from accidental changes.
- Trace from a template on another layer.
- Print certain objects only.

By default, each diagram has one layer. The default name of each layer is Layer1, Layer2, and so forth. Layer1 is the back layer.

The Layers command on the Arrange menu contains the following commands:

- **Layer Manager**- Opens the Layer Manager that lists the layers defined for the active diagram and lets you perform layer operations. In Layer Manager, you can change the visible, print, and lock properties of layers. It also lets you select the current layer; add, delete, and rename layers; change the order of layers; and specify whether you want to change the current or all layers.

- **Edit All Layers-** Selects, moves, and changes all objects in the active diagram, regardless of the layer on which they are located. When changing all layers, you cannot move an object on a lower layer in front of an object on a higher layer.
- **Add Layer-** Adds a layer to the active diagram.
- **Move to Layer-** Moves the selected objects to another layer.
- **Move Back One Layer-** Moves the layer back one layer.
- **Move Forward One Layer-** Moves the active layer forward one layer.

The **Layers** command also lets you switch between changing the current layer and changing all layers. Changing all layers lets you select, move, and change all objects in the active diagram, regardless of the layer on which they are located. When changing all layers, you cannot move an object on a lower layer in front of an object on a higher layer.

At the bottom of each diagram window is a layer tab bar that shows a tab for each layer defined for that diagram. The tabs show the names of the layers and the order for the layers. A white tab indicates the current layer. When you hide or lock a layer, the name on that tab is gray. When the tab bar contains more tabs than can be shown at once, scroll arrows appear at the left of the layer tab bar.



—Note

If you add markups to a diagram using iGrafx Viewer, a markup tab appears next to other layer tabs in FlowCharter 2000 Professional.

To change the current layer

On the layer tab bar at the bottom of the diagram window, click the tab of the layer you want to make the current layer. You may need to scroll the layer tab bar to locate the tab.



—Note

When a layer is hidden or locked, the name of the layer on the tab is unavailable. You cannot make a hidden or locked layer the current layer.

To add a layer to the active diagram

On the **Arrange** menu, point to **Layers**, and click **Add Layer**.

The new layer is added in front of the current layer and becomes the new current layer.



—Tips

To display a shortcut menu that lets you add a layer, click a layer tab with the right mouse button.

To change all layers

On the **Arrange** menu, point to **Layers**, and click **Edit All Layers**.

Edit All Layers lets you select, move, and change all objects in the active diagram, regardless of the layer on which they are located. When changing all layers, you cannot move an object on a lower layer in front of an object on a higher layer.



Notes

New objects are always placed on the current layer, even when you are changing all layers.

To switch back to changing just the current layer, clear Edit All Layers.

To display a shortcut menu that lets you edit all layers, use the right mouse button and click a layer tab.

To delete a layer

- 1 On the **Arrange** menu, point to **Layers**, and click **Layer Manager**.
- 2 Click the name of the layer you want to delete.

3 Click **Delete**.



Notes

When you delete a layer, all objects on the layer are deleted.

You also can use the Layer Manager  tool on the Draw toolbar.

To display a shortcut menu that lets you delete a layer, use the right mouse button and click the layer tab for the layer you want to delete.

To rename a layer

- 1 On the **Arrange** menu, point to **Layers**, and click **Layer Manager**.
- 2 Click the name of the layer you want to rename.
- 3 Click **Rename**.
- 4 Type the new name.
- 5 Click **OK**.
- 6 Click **OK**.



Tips

You also can use the Layer Manager  tool on the Draw toolbar.

To display a shortcut menu that lets you rename a layer, use the right mouse button and click the layer tab for the layer you want to rename.

To change the order of a layer

- 1 On the **Arrange** menu, point to **Layers**, and click **Layer Manager**.
- 2 Click the name of the layer you want to reorder.
- 3 Click **Move Up** or **Move Down** as necessary to position the layer in the list where you want it.
- 4 Click **OK**.



—Tip

To display a shortcut menu that lets you change the order of the layers, use the right mouse button and click the layer tab for the layer you want to change the order of.

To move an object to a different layer

- 1 Click the object.
- 2 On the **Arrange** menu, point to **Layers**, and click **Move To Layer**.
- 3 Click the layer to which you want to move the object.

- 4 Click **OK**.



—Tips—

When you move objects to another layer, you can make that layer the current layer.

To display a shortcut menu that lets you move a selected object to another layer, use the right mouse button and click the layer tab for the layer you want to move.

To move an object back one layer

- 1 Click the object.
- 2 On the **Arrange** menu, point to **Layers**, and click **Move Back One Layer**.



—Tips—

You can also press CTRL+F9 to move the selected object back one layer.

To move an object forward one layer

- 1 Click the object.
- 2 On the **Arrange** menu, point to **Layers**, and click **Move Forward One Layer**.



—Tips—

You can also press CTRL+F10 to move the selected object forward one layer,

To show or hide a layer

- 1 On the **Arrange** menu, point to **Layers**, and click **Layer Manager**.
- 2 To hide a layer, clear the box under the bulb icon for the layer. To show a layer, select the box under the bulb icon for the layer.

3 Click **OK**.



Notes

You cannot hide the current layer. If you try to hide the current layer, the Layer Manager does not close until you make the layer visible or change the current layer to a visible layer.

To speed up the redraw of complicated drawings, hide the layers that you are not currently working with.

To display a shortcut menu that lets you show or hide a layer, use the right mouse button and click the layer tab for the layer you want to show or hide, and then click Visible.

Hiding a layer does not affect its print property.

To make a layer printable or nonprintable

- 1 On the **Arrange** menu, point to **Layers**, and click **Layer Manager**.

To make a layer nonprintable, clear the box under the printer icon for the layer.

To make a layer printable, select the box under the printer icon for the layer.

- 2 Click **OK**.



Notes

You can print hidden layers unless they are also nonprintable.

To display a shortcut menu that lets you show or hide a layer, use the right mouse button and click the layer tab for the layer you want to make printable or nonprintable.

You also can use the Layer Manager tool  on the Draw toolbar.

To lock or unlock a layer

- 1 On the **Arrange** menu, point to **Layers**, and click **Layer Manager**.
- 2 To lock a layer, select the box under the lock icon for the layer.
- 3 To unlock a layer, clear the box under the lock icon for the layer.
- 4 Click **OK**.

When a layer is locked, it can be displayed or hidden, but it cannot be changed, reordered, or deleted.



—Note —

You cannot lock the current layer. If you try to lock the current layer, the Layer Manager does not close until you unlock

Linking Diagrams

Linking and Embedding from Other Applications

OLE is a protocol that is used by many Windows applications to exchange information. FlowCharter 2000 Professional acts as an OLE container application. You use OLE to include information from other programs into your diagrams.

When you include OLE information, you choose whether to embed or link it. The main difference between linking and embedding is where the data is stored.

Embedding Objects

The advantage to embedding is that one diagram contains all the information. If you copy the file to a floppy disk or another computer system, all of the objects are stored within it. The disadvantage is that size and performance are affected as the number of embedded objects increases.

Linking Objects

The advantage to linking is that you ensure that the most recent information prepared by other users or computer systems can be kept up-to-date in your file. The disadvantage is that the linked objects could be moved or become unavailable.



Note

You can create an OLE link to any Windows application that acts as an OLE server. To link to other iGrafx documents, use the Link command on the Insert menu.

Inserting an Embedded Object

When you create a new object, it is automatically an embedded object because there is no file to link it to. An embedded object becomes part of the FlowCharter 2000 Professional diagram.

When you embed an object, you can specify either that its contents appear in the diagram or that an icon be displayed. For example, you can put the contents of a Microsoft Excel chart in the diagram, or you can display the Excel icon.

Insert Object dialog box

Element	Description
Create New	Invokes an application and creates a new occurrence of one of its objects. For example, you can open a package like Microsoft Equation, design a formula, and insert it beneath a symbol in the diagram.

Object Type	Displays a list of all applications registered on your computer as OLE objects. The list varies from installation to installation, depending on the software that is available.
Create from File	Inserts an object that already exists. This option changes the dialog box. Type the full path name for the object or use the Browse button to locate the file. If you choose Link, the object is linked; otherwise, the object is embedded.
Display as Icon	Represents the object in the diagram as an icon. This option changes the dialog box so that it displays the current icon. You can change it by clicking on the Change Icon button.

Convert To dialog box

Element	Description
Convert To	Permanently converts the object to the new object type, and displays a list of valid types for your computer system. For example, if the object is a graphic, then the list includes the graphic editors that recognize the current type (and therefore can be used to edit it).
Activate As	Temporarily activates all embedded objects of the selected type. For example, converts all PowerPoint drawings to a different graphic editor. When you edit the object, you use the application you choose, but changes are saved in the PowerPoint format. This option is available only if there are two or more embedded objects of the same type.
Display as Icon	Displays the object as an icon. You may want to change the icon at this point to correlate to the new format.

To insert a new embedded object

- 1 On the **Insert** menu, click **OLE Object**.



—Note

The registration database is the source of information used by applications that support OLE. This is the database used by FlowCharter 2000 Professional to determine which objects are registered on your computer for OLE purposes.

The database (called reg.data) is set up and maintained by Windows and Windows applications and is located in the Windows directory. If FlowCharter 2000 Professional does not recognize an application object, it may be due to a problem in this database. Do not move or delete this file, since doing so may result in a loss of functionality in applications that support OLE.

- 2 In the **Insert Object** dialog box, select the object type, and then click **OK**.
- 3 When you finish creating or editing the object that you want, close the application.



—Note

Some applications ask you to confirm that you want to close and update the diagram; others do not. If you are satisfied with the object, be sure to choose Yes or OK to update the diagram.

To edit an embedded object

- 1 Select the OLE object in the diagram.
- 2 On the **Edit** menu, point to **[Type] Object**, and click **Edit**.
(The [Type] of object may appear in the menu. For example, the menu item for a document might be Document Object.)
This opens the application that created the object. For example, if you have embedded a CorelDraw drawing, you can open CorelDraw and edit the drawing by double-clicking it in the FlowCharter 2000 Professional diagram.

To convert an embedded object to a different format

- 1 Select the OLE object in the diagram.
- 2 On the **Edit** menu, point to **[Type] Object**, and click **Convert**.
The current type of object is listed at the top of the **Convert** dialog box.
- 3 In the **Convert** dialog box, select a new object type from the list, and click **OK**.

Dragging and Dropping

If you have a source application that supports drag and drop and OLE, you can create an embedded object by copying from a source file and pasting into a diagram. You can either drag and drop a selected area or use the Paste Special menu.

Links dialog box

Element	Description
Update Now	This updates the linked object. If the source has changed since you opened the diagram or last updated the link, this option loads the new version.
Open Source	This opens the source file in its source application.
Change Source	This opens the Change Source dialog box so you can change the source file. You can choose a different file by entering a new path or using the Network button to set the location.
Break Link	This breaks the link and disconnects from the application. When you break a link, the linked information remains in your diagram. However, it can no longer be updated. The link becomes a standard graphic. Once you break a link, you cannot reconnect it.

To embed an object into a diagram

- 1 Open both the source file and the FlowCharter 2000 Professional diagram, and adjust the window sizes so that both applications are fully displayed on the screen.
- 2 Select the area in the source file that you want to link.
- 3 Drag the area into the diagram.

To move the area, use the mouse to drag the area into the diagram. The cursor indicates that the selected area is being moved.



To copy the area, press and hold the **CTRL** key while you use the mouse. The cursor changes to indicate that a copy is made of the selected area.



- 4 Release the mouse button.



—Note

If you drop an area directly over an activity symbol, the area is embedded in the symbol.

To use **Paste Special** for OLE objects

- 1 Make sure that you save the source file before you link the information.
- 2 Open the source file and select the information that you want to link.
- 3 On the **Edit** menu, click **Copy**.
- 4 Switch to FlowCharter 2000 Professional, and click **Paste Special** on the **Edit** menu.
- 5 In the **Paste Special** dialog box, select **Paste** or **Paste Link**.
Paste- Embeds the object.
Paste Link- Links the object.
- 6 Select the Format in the **As** box.
- 7 To display the link as an icon, select **Display as Icon**.
- 8 Click **OK**.

To create a link to an object

- 1 On the **Insert** menu, click **OLE Object**.
- 2 In the **Insert Object** dialog box, select **Create from File**.
- 3 Type the path to the object or use the **Browse** button to locate it.
- 4 Select the **Link** box.

- 5 If you want to display the contents of the object as an icon, select **Display as Icon**.



—Note —

If you do not display as an icon, then the contents of the object are shown. For example, the first page of a Word document is displayed.

To edit linked information

Click the shape, and click **OLE Links** on the **Edit menu**.

The **Links** dialog box opens, and each link is displayed with its path, type, and update method.

To control how links are updated

- 1 On the **Edit** menu, click **OLE Links**.
- 2 Select the link that you want to update.



—Note —

You can select multiple links by holding down the CTRL key while you click each link.

- 3 For Update, select one of the following:
Automatic- Updates linked information every time there is a change in the source file.

Manual- Updates linked information only when you save the source file yourself.

To view as an icon

- 1 Click a linked object.
- 2 On the **Edit** menu, point to **[Type] Object**, and click **Convert**.
- 3 In the **Convert** dialog box, select the **Display as Icon** box.
- 4 To change the type of icon displayed, click **Change Icon**.
- 5 Click **OK**.

Linking Shapes to Other Diagrams or Web Pages

You can link shapes to other diagrams or Web pages using FlowCharter 2000 Professional. Linking lets you disclose information in levels by linking shapes in one diagram to a group of related diagrams.

Linking Shapes to Other Diagrams

Linking shapes to other diagrams helps people in organizations of all sizes deliver several diagrams from one source. For example, a diagram containing marketing goals can have linked shapes to more in-depth diagrams explaining sales divisions and the goals of each person within the division.

Use the General and Inputs tabs on the Properties dialog box to:

- Add links to a new diagram
- Add descriptions and key modifiers to linked shapes
- Edit and delete existing links
- Add advanced link settings
- Activate links

Linking Shapes to Web Pages

Linking shapes to Web pages is another way to distribute diagrams to a larger audience. A sales manager using the example above could take the same diagram source and post it to the company Intranet page. Travelling sales people can then browse the company Intranet to get the latest information on goals and what other sales divisions are doing.

To link a shape to a new diagram

- 1 In the active diagram, click **Components** on the **File** menu.
- 2 In the **Components** dialog box, click **New**, and then click **Basic Diagram** or **Process**.
A new **Basic Diagram** or **Process** is created.
- 3 Click **Close**.
- 4 On the **Windows** menu, click the name of your initial diagram.
- 5 Right-click the shape that you want to link the new diagram to, and then click **Properties**.

- 6 In the **Properties** dialog box, click the **General** tab, and then click **New**.
- 7 In the **Add Link** dialog box, select the new diagram from the **Name** box.
- 8 To add a key modifier, click the **Key Modifiers** box, and then press **CTRL**, **ALT**, **SHIFT**, or any combination of the three.

Key modifiers let you modify the linked shape without activating the link. For example, if you select **CTRL** as a key modifier you can do two things:

Double-click the shape- This opens the **Properties** dialog box so you can edit the link.

Press **CTRL** and double-click the shape- This activates the link.



—Note —

If you are using hotkeys to move around in the Add Link Dialog box, **ALT** will replace any key modifiers you have set.

- 9 To add a description for the link, type a description in the **Description** box.
- 10 Click **OK**.
- 11 In the **Properties** dialog box, click **OK**.

To edit a linked shape

- 1 Right-click the linked shape, and then click **Properties**.
- 2 In the **Properties** dialog box, select the link in the **Links** box.
- 3 Click **Edit**.
- 4 In the **Change Link** dialog box, make any changes.
- 5 Click **OK**.
- 6 In the **Properties** dialog box, click **OK**.

To activate a linked shape

Double-click or use the assigned key modifier on a shape.

or

Right-click the linked shape, and then click the named link at the bottom of the menu.

or

Right-click the linked shape. In the **Properties** dialog box, click the **General** tab, select the link in the **Links** box, and then click **Activate**.

To delete a linked shape

- 1 Right-click the linked shape, and then click **Properties**.
- 2 In the **Properties** dialog box, select the link in the **Links** box.
- 3 Click **Delete**.

- 4 Click **YES**.
- 5 In the **Properties** dialog box, click **OK**.

To add advanced link settings

- 1 Open a diagram containing the link you want to use.
- 2 Open the diagram that you want to link to.
- 3 Right-click the shape that you want to be the starting point of the diagram, and then click **Properties**.
- 4 In the **Properties** dialog box, click the **Inputs** tab.
- 5 Select the **Start Point** box, and click **OK**.
- 6 Open the diagram that contains the shape you want to link.
- 7 Right-mouse click the shape, and then click **Properties**.
- 8 Click the **General** tab, and then select the link in the **Links** box.
- 9 Click **Edit**.
- 10 In the **Change Link** dialog box, click **Advanced**.
- 11 In the **Advanced Link Settings** dialog box, select **Start from the Start Point box**.
- 12 To accumulate custom data attached to the shape, select **Accumulate Custom Data**.
- 13 Click **OK**.
- 14 In the **Change Link** dialog box, click **OK**.
- 15 In the **Properties** dialog box, click **OK**.

To link a shape to a file or Web page

- 1 Click the shape that you want to link.
- 2 On the **Insert** menu, click **Link**.
- 3 In the **Add Link** dialog box, select **File** or **Web Page**.
- 4 To link a shape to a file, type the path in the **Path** or **URL** box.
- 5 To link a shape to a URL, type the relative path in the **Path** or **URL** box.
- 6 To add a key modifier, select the **Key Modifiers** box, and then press **CTRL**, **ALT**, **SHIFT**, or any combination of the three.

Key modifiers let you modify the linked shape without activating the link. For example, if you select **CTRL** as a key modifier you can do two things:

Double-click the shape- This opens the Properties dialog box so you can edit the link.

Press **CTRL** and double-click the shape- This activates the link.



—Note —

If you are using hotkeys to move around in the Add Link Dialog box, ALT will replace any key modifiers you have set.

- 7 To add a description for the link, type a description in the **Description** box.
- 8 Click **OK**.

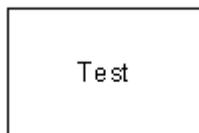
Using Advanced Diagramming Features

Working with Custom Data

FlowCharter 2000 Professional lets you add custom data fields to individual shapes in a diagram. Each data field for a shape has its own name and function. For example, you can accumulate data using selections in the Setup Custom Data dialog box for a shape labeled *Test*. You can use this feature to analyze the cost of activities along the critical path of a process:

Field	Elements
Cost	Name - Type Cost. Type - Select Currency. Format - Select \$###0.00. Accumulation Method - Select Sum.
Duration	Name - Type Duration. Type - Select Duration. Format - Select #hrs. Accumulation Method - Select Sum.

After applying these selections, type the dollar amount for Cost and the time for Duration in the Custom Data tab on the Properties dialog box. If you have fields set up to display at the bottom of the shape, this is what the shape looks like in the diagram:



Cost: \$60.00
Duration: 6 hrs.



Note

Any information that you change in these fields at a later time will automatically update in the diagram.

To add custom data fields to a shape

- 1 Right-mouse click the shape that you want to add fields to.
- 2 Click **Properties**.
- 3 In the **Custom Data tab**, click **Setup**.
- 4 In the **Setup Custom Data** dialog box, type a name for the field in the **Name** box.
- 5 Select a type, format, and accumulation method for the field in each of these lists.

To add more fields, clear the **Name** box and repeat steps four and five.

- 6 Click **OK**.
- 7 In the **Custom Data** tab, click the field next to the name, and then type the field information.

For example, if you have a field labeled Cost, type 15.00.

- 8 Click **OK**.



—Note

You can display fields in or around the shape.

To delete custom data fields from a shape

- 1 Right-mouse click the shape that you want to delete a field from.
- 2 Click **Properties**.
- 3 In the **Custom Data** tab, click **Setup**.
- 4 In the **Setup Custom Data** dialog box, click the field in the **Custom Data** box, and then click **Delete**.
- 5 Click **OK**.
- 6 In the **Properties** dialog box, click **OK**.

To add advanced custom data field options to a shape

- 1 Right-mouse click a shape containing field(s).
- 2 Click **Properties**.
- 3 In the **Custom Data** tab, click **Setup**.

- 4 In the **Setup Custom Data** dialog box, click **Options**.
- 5 Edit hours per day and days per week, and then click **OK**.
- 6 In the **Setup Custom Data** dialog box, click **OK**.
- 7 In the **Properties** dialog box, click **OK**.

To insert a legend displaying custom data

On the **Tools** menu, point to **Custom Data**, and click **Insert Legend**.

The Legend displays custom data added to shapes.

Working with Visual Basic for Applications

FlowCharter 2000 Professional contains Microsoft's Visual Basic for Applications (VBA), version 6.0 as its integrated development environment. VBA provides a programming interface to the powerful features that comprise FlowCharter 2000 Professional. Used with iGrafx System, you get a powerful graphics engine and a development environment that lets you quickly extend the capabilities of applications. For more information on iGrafx System, see *Developing Custom Solutions with iGrafx System* included in your box.

VBA is a widely used programming language and is integrated into Microsoft's Office products. If you have any experience customizing or extending these applications, then you have a head start in developing with iGrafx System. Even without prior experience, you have the advantage of using a widely accepted and standardized development tool.

To run a VBA macro

- 1 On the **Tools** menu, point to **Visual Basic**, and click **Macros**.
- 2 In the **Macros** dialog box, select a macro from the list.
- 3 Click **Run**.



Note

This procedure assumes that you opened a document containing VBA macros. If no macros exist in the document you are creating or opening, the Macros command on the Tools menu will not be active.

To open a VBA Extension Project

- 1 On the **Tools** menu, point to **Visual Basic**, and click **Extension Projects**.
- 2 Click **Open**.
- 3 Navigate to a iGrafx Extension Project (*.flx), and click **Open**.

The project is added to list in the **Extension Project** dialog box.

- 4 Select the box next to the project, and click **Open**.

To modify VBA security settings

- 1 On the **Tools** menu, point to **Visual Basic**, and click **Security**.
- 2 In the **Security** dialog box, select:
 - High- Prevents any unsigned macros from automatically running.
 - Medium- Lets you choose whether or not to run macros. This is the recommended setting.
 - Low- Lets all macros run. This is not a recommended setting.
- 3 Click **OK**.

Working with iDiagrams

An iDiagram is a diagram that runs like a program. iDiagrams walk you through shapes containing VBA code, letting you make the decisions as you go. These decisions move you along a path from shape to shape where custom data is collected.

After you place shapes in an iDiagram, you can add code to them using Visual Basic. Using the iDiagram Entity Manager, you can step through, stop, and pause an iDiagram. You can also add or delete entities from shapes using the Manager.

For more information about developing custom code for use with shapes, view the help file provided with Visual Basic.

To create a new entity

- 1 On the **Tools** menu, point to **iDiagram**, and click **Entity Manager**.
- 2 Click the **Add Entity**  tool.

To add an entity to a shape

- 1 On the **Tools** menu, point to **iDiagram**, and click **Entity Manager**.
- 2 Select an existing entity, or create a new entity.
- 3 Click the shape that you want to add the entity to.

To delete an entity from a shape

- 1 On the **Tools** menu, point to **iDiagram**, and click **Entity Manager**.
- 2 Select an entity.
- 3 Press **DELETE**.

To run an iDiagram

On the **Tools** menu, point to **iDiagram**, and click **Execute**.

Working with SPC Charts

FlowCharter 2000 Professional lets you create different kinds of charts that support quality and process re-engineering. To implement these processes, quality charts are needed for relaying complex data in easy to understand formats.

With SPC charts, you can:

- Identify unstable processes
- Visualize extent of variation in a process
- Improve decision-making
- Identify special cause variation in a process
- Predict progress of a process
- Determine current ability of a process
- Analyze processes over time
- Compare data
- Organize data into recognizable categories
- Set priorities of a process
- Illustrate impacts of individual affects
- Show relationship between paired data

To select and place SPC charts in a diagram, use the DataAnalyzer Chart wizard. After selecting which chart you want to use, you can type information into an active spreadsheet in the diagram space. DataAnalyzer then graphically converts the data for display in the diagram.

For more information on specific SPC chart types, select a chart in the DataAnalyzer Chart wizard, and click More. To get information on DataAnalyzer functions, view datalyzer.hlp located in iGrafX\Pro\8.0.

You can create the following charts using FlowCharter 2000 Professional and DataAnalyzer:

- Process charts
- Cause-and-effect (Ishikawa or fishbone) charts
- Organization charts
- Deployment charts
- Pareto charts
- Histograms
- Run charts (trend charts)
- Control charts
- Scatter charts
- Pie charts

To insert a SPC chart in a diagram

- 1 On the **Insert** menu, click **SPC Chart**.
- 2 In the **DataAnalyzer Chart** wizard, click **Next**.
- 3 Select a chart type, and click **Finish**.

To add data to a SPC chart

- 1 Insert an SPC chart in the diagram.
- 2 In the active spreadsheet, type x and y axis labels in the cells.
- 3 Click the **Data Import Wizard**  tool.
- 4 Follow the steps in the Data Import wizard.
- 5 After you have imported the data, click outside of the SPC chart.
The SPC chart is inserted in the diagram.

To delete a SPC chart from a diagram

- 1 Click the **Selector**  tool on the **Toolbox** toolbar.
- 2 Click the SPC chart.
- 3 Press **DELETE**.

Working with iGrids

iGrids are graphical templates that you can use to diagram hierarchies, matrices, comparisons, schedules, timelines, and checklists. Each iGrid has corresponding options for adding or removing elements, sizing, placing, and aligning. After choosing from these options, the iGrid appears in the diagram space.

Depending on which iGrid you select, a Share Media subject tab will appear in the Gallery. Use the clip art in these tabs to add graphics and color to your iDiagrams

The following chart describes the iGrid templates in FlowCharter 2000 Professional:

iGrid	Description
Pyramid	Shows hierarchical lists, such as those illustrating business values and goals or customer requirements.
Basic	Shows a grid of squares in the diagram. The grid enables you to place objects in precise positions.
Block	Shows a graphical matrix or gives a brief overview of a process.
Cascade	Shows items in a sequence, such as steps in a process.
Process	Shows the details of a process so that it can be readily understood.
Deployment	Shows the flow of information and materials among different organizational units.
Comparison	Shows comparisons of items in columns and rows, such as products and features. These charts can represent yes/no relationships (using check marks or thumbs up/down) or multiple-value relationships (using filled bullets).
Timeline	Shows schedules for tasks, projects, and procedures.

Circle-Spoke	Shows items in a circular arrangement, connected to a center shape. Spoke charts are useful for illustrating business principles, the key benefits of a product, or a product line.
Target	Shows concentric rings of focus, such as with increasingly focused customer groups and business objectives.
DrawBar	Shows general relationship and conceptual quantitative relationships (for example, something is smaller than or larger than something else).
Checklist	Shows single or multiple-column visual checklists.

To insert an iGrid

- 1 On the **Insert** menu, click **iGrid**.
- 2 In the **Insert iGrid** dialog box, click the iGrid icon that you want to insert.
- 3 Edit the options you want to change.
- 4 Click **OK**.

To edit an iGrid in the diagram space

- 1 Right-mouse click the iGrid.
- 2 Click **Edit iGrid**.

Yellow sizing diamonds appear on edges of the iGrid in the diagram.

- 3 To change the size of the iGrid, click the diamonds and drag the iGrid to a new position.
- 4 To finish the positioning, click the **Selector**  tool, and then click outside the diagram space.

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