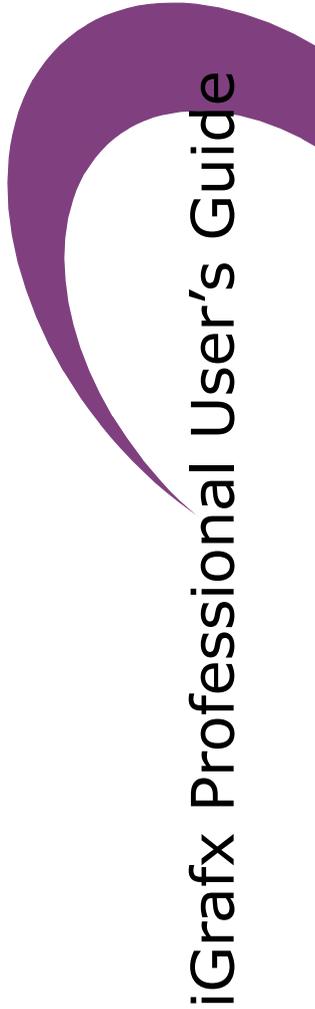


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Revised 12/97

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Frequently Asked Questions

What is the significance of the Micrografx software license agreement?

The license agreement is the document under which Micrografx grants you, the end user, the right to use the software product. In addition to the end user license agreement, your use is governed by the U.S. Copyright Act.

How has Micrografx changed its end user licensing policy?

Micrografx has changed its end user license agreement to simplify how its products are licensed for home, portables, and laptop use.

What does the license say?

The underlying principle of Micrografx's licensing policy has been and continues to be that each use of a Micrografx product requires a license. Each license grants you the right to use one copy of the software product on your computer. In addition, the license sets out the rules by which you may use the product on a computer network.

How do I determine how many licenses I need for my company to comply with the Micrografx license agreement?

Starting with the principle that you need one license for each use of the product, there are two basic rules that you need to follow in counting the number of "uses" of the product in your company. First, each copy of the product that is installed on a hard disk or other storage device of a computer is a "use" that requires one license. Second, if you plan to use the product on a computer network, and you have fewer licenses than the total number of workstations, then you need to determine the maximum number of users of the product you will have at any one time. The total number of "uses," arrived at by adding the number of copies that you will have installed on hard disk plus the maximum number of users on a network, determines the number of licenses you need.

How do I determine the "maximum number of users" in my company's computer network?

To comply with the Micrografx license agreement, you must have adequate controls and mechanisms in place to ensure that you have at least as many licenses as you have uses of the product at any one time. While there is no single method that Micrografx requires or prescribes, you must have electronic or manual controls or procedures to justify your calculation of the number of licenses. For example, there are electronic devices and software programs that limit access to particular products running off a network server that would comply with this requirement (see the next question about "electronic token" technologies). As an example of a manual method of making this calculation, some companies periodically poll their users to determine how many employees never use the product, and then simply purchase licenses for the remaining number of users.

If I load the product on the hard disk of every workstation on the network, can I still count the number of users so I don't have to purchase a license for every workstation? Is the answer different if I use the so-called "electronic token" technology to limit the actual number of users?

No. And no. Loading the product onto the hard disk or other storage device of a network workstation is a "use" that requires a license. It makes no difference if you have an "electronic token" system to regulate use. The only way you may have fewer licenses than workstations on a network is when some of the workstations access the product off the network server itself (i.e., the product is not stored on the workstation's hard disk) and you have determined that less than all of the workstations use the product at any one time. Of course, if you transfer or "download" the product from the server to a workstation's hard disk, which requires one license, you may later completely delete the product off that hard disk to free up that one license for use elsewhere.

Do I need a separate license for the copy of the product on the server?

No. You need not count the server as one "use," provided that the server copy is merely accessed by the workstations connected to it and not used separately.

If I have a Micrografx application loaded into the temporary memory (RAM) of my network, but it is iconized and not actively in use, is a license required?

Yes. We consider that you are "using" one of our products whenever it is loaded on your hard disk or in RAM. Thus, a program that is iconized requires a license because it was first loaded into memory, or RAM. Remember, however, that unlike a product stored on a workstation's hard disk (requiring one license), a product run off the server may be terminated or closed quickly, freeing up that product license for use by another workstation on the network.

Does Micrografx continue to allow end users to make a second copy of its application for home and laptop use?

Yes. If you have a Micrografx product loaded on the hard disk or other storage device of your computer, then you may make a second copy for home and laptop use so long as the Software is not used on both computers at the same time. The principle here is to allow you to use the Micrografx product even when you are away from work, either at home or while traveling. However, this does not apply to products that are loaded on the network server. (Some companies have their own restrictions on home software use, so you may need to check with your systems administrator on this topic.)

Is this Micrografx license a site license? If not, how does it differ?

This Micrografx end user license is not a site license because each use requires a separate license. In a "site license," a company is given unlimited rights to internal use of a software product for a flat fee.

iGrafx™

PROFESSIONAL
User's Guide

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iGrafx *Professional* 2000

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Welcome to iGrafx *Professional* 2000

Welcome and thank you for buying iGrafx *Professional* 2000. iGrafx *Professional* is an intelligent business diagramming and modeling solution designed for knowledge workers, managers, and IT professionals. With the intuitive ease of use of iGrafx *Professional*, it has never been easier to create free-form, structured, network, process, software, and presentation diagrams.

iGrafx *Professional* Features

- Intelligent Departments
- Automatic Connectors
- Automatic Off-page Connectors
- Unlimited Page Size
- Powerful Graphics Engine
- Powerful, Flexible Shape Numbering
- Automatic Fit-to-Text
- Crossovers and Intersection Dots
- Multiple Text Areas
- Multiple Fonts, Interline Spacing, Paragraphs, Bullets within Shapes
- Visual Basic for Applications 6.0 Support
- VBA iShapes
- Integrated VBA Programming Interface



- Web Support (HTML and Java)
- 20+ filters, including: CGM, DWG, and Visio®

System Requirements

The minimum system requirements for installing and running iGrafx *Professional* are listed below.

- Pentium processor
- Windows 95, 98, or Windows NT 4.0 or higher
- 16 MB RAM for Windows 95 and 98; 32 MB RAM for NT
- At least 50 MB of hard drive space
- 640x480 256 color monitor (800x600, 16-bit color recommended)
- CD-ROM drive
- Mouse or other pointing device

Installing iGrafx *Professional*

- 1 Insert the Application CD-ROM in your CD-ROM drive. The Setup program automatically starts.
- 2 Follow the instructions on the screen. The Setup program guides you through the installation.

The Typical Installation installs all applications included with iGrafx *Professional* and is the recommended installation type.

The Compact Installation saves disk space by installing only the minimum files required to run each component.

The logo for iGrafx Professional User's Guide, featuring a stylized purple swoosh that curves around the text.

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The Custom Installation lets you choose which applications to install. You can also select specific filters to install.



— Note —

If you don't have enough disk space to install your selection, you can clear off more disk space or change to a location on your hard drive where more disk space is available.

Installing Fonts

Windows requires that fonts be installed to the same drive where Windows is located. If your computer's hard disk drive is set up as more than one drive (for example, drive C: and drive D:), you can choose to install *iGrafx Professional* to any drive, but you must have enough disk space available for fonts on the drive that contains Windows.

Uninstalling *iGrafx Professional*

You can use Windows Add/Remove Programs to uninstall the entire *iGrafx Professional* package. For more information on Add/Remove Programs, click Help on the Windows Start menu.



Technical Support

Getting the most out of your investment is central to your success. That is why we have developed a fee-based support program for registered users in the U.S. and Canada that delivers fast, flexible, and comprehensive service for the Micrografx products you own. This program is backed by our commitment and all the resources necessary to provide you with the service you expect.

Our staff of experienced technical advisors are specialists in the critical areas and applications important to you. Our experts can assist callers quickly and efficiently.

Complimentary Support

As a registered iGrafx *Professional* customer, you are entitled to thirty days of complimentary support following your first call to our technical support staff.

You can receive technical support from a technical support advisor between the hours of 7:00 a.m. and 5:00 p.m. (Central time), Monday - Friday.

To contact technical support during this time, call (972) 234-2694.

You can fax your questions to (972) 644-3688.

Contact Micrografx through the Internet as follows:

<http://www.mgxsupport.com>



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Thereafter, whether you want full-service coverage or occasional support for your Micrografx products, you will like the flexibility of choosing only those services you need.

Using Online Documentation

Online documentation, found in Adobe® Acrobat® PDF format, contains all reference materials found in Help and information found in the user's guide. Access the PDF documentation by clicking the Start button, pointing to Programs, iGrafx, and then Documentation. The PDF documentation is also located on the Application CD-ROM as uncompressed files.

Learning About Help

To use iGrafx *Professional* more effectively, we designed an integrated online help system using the familiar Windows 95 help system with the three tabs, Contents, Index, and Find. You access this help system through the Help menu on the application.

In addition, help information for iGrafx *Professional* is accessible through context-sensitive online help. The help system is designed so that you can easily find the information you want—from conceptual topics, to specific procedures, to detailed information on buttons, tools, and dialog boxes—with just a few mouse clicks.

The most up-to-date information regarding iGrafx *Professional* can be found in the `Readme.txt` on the root of the CD.



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Using iGrafx *Professional*

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This chapter covers the following topics:

- *Using Toolbars and Tool Palettes* on page 26
- *Using Menus and Commands* on page 51

Using Toolbars and Tool Palettes

iGrafx *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
- Data
- iDiagram



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- Visual Basic
- Model

Customizing Toolbars

When customizing, you can:

- Show the toolbars you are using, and hide the toolbars you are not using.
- Drag and dock the toolbars.
- Create new toolbars.
- Delete any toolbars you have created and no longer want.
- Add tools to existing toolbars (including the tools on the default toolbars).
- Remove tools from toolbars (including the tools on the default toolbars).

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—Tips—

You can resize your Font box, or any other drop-down box, on the toolbar while the Customize dialog box is open. To open the Customize dialog box, click Customize on the Tools menu.

You can add over 20 custom toolbars that show up in the shortcut menu (displayed when you right-click in the toolbars area). You must use the Toolbars command on the View menu to see them. (The number of toolbars you can view on the shortcut menu varies depending on your screen resolution.)

You can return the Micrografx-supplied toolbars to the way they were when you installed the program. To do this, on the View menu, click Toolbars. Click the toolbar to reset, and click Reset. Any tools you have added are removed. Any tools you have deleted are replaced.

You can drag tools off a toolbar. To do this, click on the tool to remove and drag it off the toolbar. Note that you cannot undo this action.

Standard Toolbar

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

Tool	Name	Description
	New	Creates a new diagram.
	Open	Opens a previously existing diagram.

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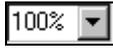
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	Save	Saves the active diagram.
	Print	Prints the active diagram.
	Print Preview	Shows the diagram as it looks when you print it.
	Spelling	Checks the spelling of text in your diagram.
	Cut	Removes the selected item and places it on the Clipboard.
	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 Arrange Toolbar.
	Properties	Opens the Properties dialog box.



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Zoom Control

Magnifies the diagram by the percentage you select or enter.



Help

Displays information about the item you click next.

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	Name	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 transparent.
	Text Color	Applies color to text.
	Vertical Align	Specifies Top, Middle, or Bottom alignment. Click the tool and then choose from the menu.

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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 (+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	Name	Description
	Selector	Selects, moves, and resizes drawn elements.
	Insert Department	Adds, edits, or deletes department attributes.

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Tool	Name	Description
	Shapes	<p>Places shapes in a diagram and selects shape attributes and properties.</p> <p>You can use different shapes to represent steps, documents, events, and other information in diagrams.</p>
	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.

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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	Name	Description
	Draw	Draws shapes in a diagram.
	Selector	Selects, moves, and resizes drawn elements.
	Rotate	Rotates selected objects.
	Edit Points	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.



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Tool	Name	Description
	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 and layers in your diagram.• Group - groups selected objects.• Ungroup - ungroups selected grouped object.



Tool	Name	Description
	Combine	<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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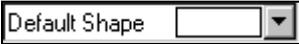
Tool	Name	Description
	Layer Manager	Opens the Layer Manager. In Layer Manger, you can change the visible, print, and lock properties of layers. Also, Layer Manager selects the current layer; adds, deletes, and renames layers; changes the order of layers; and specifies whether you want to change the current or all layers.
	Text Color	Applies color to text.
	Fill Color	Specifies the color for a shape.
	Fill Pattern	Specifies the pattern for a shape.
	Line Color	Applies color to lines, line endings, and shape borders.
	Line Style	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.
	Line Weight	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.

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Tool	Name	Description
	Arrowheads	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.
		 Note You cannot change arrowhead styles on filled lines.
	Crossovers	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.
	Shadow	Places a drop shadow on the current shape.
	3D	Gives the shape a 3-dimensional appearance.

Preset Styles Toolbar

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

Tool	Name	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	Name	Description
	Insert Entity	Inserts an entity into the selected shape.
	Entity Manager	Shows or hides the Entity Manager.
	Execute	Runs the diagram.

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	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 iGrafx *Professional* shapes.

Tool	Name	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*.

Tool	Name	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.

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	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.
	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.

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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 iGrafX *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.



— Notes —

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.

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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 iGrafX *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 Formatting 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 Formatting 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.

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Using Color Palettes

With *iGrafX 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 Text Color, Fill Color, or Line Color tool on the Formatting toolbar.



Text Color



Fill Color



Line Color

- 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.

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- 1 Click the Text Color tool.
- 2 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 checked.
- 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.



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Using Menus and Commands

For every task in *iGrafx 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	On the File menu, point to New and click one of the three commands. You can create a new document as: A Basic Diagram Process A new document based on a template

Command	Description
Open	<p>Opens an existing diagram or workspace.</p> <p>You can open these file types:</p> <p>Documents (file names ending with an IGX, FLO, ABC, AF3, AF2, PFD).</p> <p>Templates (file names ending with the IGT extension).</p> <p>Workspaces (file names ending with the IGW extension).</p> <p>The shortcut key is CTRL+O.</p>
Close	<p>Closes the active document.</p>
Close All	<p>Closes all documents.</p>
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>



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Command	Description
Save as Web Page	Saves a iGrafx <i>Professional</i> 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.
Components	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.
Shape Library	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).
Template	Provides information on the template associated with the document.

Command	Description
Page Setup	<p>Sets the size of the page.</p> <p>Sets the orientation of the page (portrait or landscape)</p> <p>Sets the scaling to fit diagrams on pages</p> <p>Sets the size of the page margins (borders)</p> <p>Sets custom headers and footers</p> <p>Sets the order in which pages are printed</p> <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>
Print Preview	<p>Previews how the diagram looks when you print it.</p>
Print	<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>
Send	<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, and Lotus cc:Mail.</p>

Command	Description
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 documents 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	<p>Reverses the last action or change on a diagram. If an action cannot be reversed, Can't Undo appears on the menu.</p>
Redo	<p>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.</p> <p>If the program cannot reverse the most recent undo, Redo is not available.</p>
Cut	<p>Removes the selected objects from a diagram and places them on the Clipboard.</p>

Command	Description
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	Deletes the selected objects from a diagram. The Clear command deletes objects permanently. They are not placed on the Clipboard. Use the Undo command to recover a cleared object.
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	Searches for and replaces text in shapes, lines, notes, and the entire diagram. You cannot replace shape numbers.

Command	Description
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	<p>Opens the object application so you can change the linked or embedded object.</p>

View menu

The View menu contains the following commands:

Command	Description
Normal	<p>Displays the diagram graphically.</p>
Tabular	<p>Displays the diagram as a table with associated data for each shape.</p>
Full Screen	<p>Displays all of the elements of your diagram on the screen without menus or tools. Press ESC to return to the previous view.</p>
Master Page	<p>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.</p>

Command	Description
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.
Properties	Displays the Properties dialog box for setting or modifying properties of selected objects.
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.
Picture	Inserts pictures from other files, Simply3D objects, Picture Publisher images.
iGrid	Inserts an iGrid.
SPC Diagram	Inserts SPC diagrams.
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 renumbers 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.
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.
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.
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 and layers 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	Connects and disconnects closed and open objects. Also, forms new shapes from different combinations of operations that you can perform with shapes.

Model menu

The Model menu contains the following commands. Use these commands with iGrafX *Process*.

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.

Command	Description
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.

Command	Description
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 <i>Professional</i> 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 <i>Professional</i> Home Page	Displays the home page for the iGrafx <i>Professional</i> product in the Micrografx Internet site.
Micrografx Home Page	Displays the Micrografx Internet home page.
About iGrafx <i>Professional</i>	Displays the program's version number, copyright, and licensing information.

Getting Started with Diagrams

This chapter covers the following topics:

- *Creating New Documents* on page 66
- *Opening Documents* on page 70
- *Viewing Diagrams* on page 74
- *Importing Other Formats* on page 71
- *Using iGrafx Professional Tools* on page 77
- *Editing Diagrams* on page 86
- *Printing Diagrams* on page 96
- *Saving and Closing Documents* on page 98
- *Distributing Documents* on page 103

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.

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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.

iGrafX *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 iGrafX *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.

iGrafx *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 Professional.
- 2 In the Welcome Dialog, click New Document, and then click Process or Basic Diagram.

To create a new document using the New command

- 1 On the Windows Start menu, point to iGrafx, and click Professional.
- 2 On the File menu, click New. You can select:
 - 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 Professional (*.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 Professional Template (*.igt)*.
- 5 Give a name to the template in the File name text 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 *iGrafx Professional* in FlowCharter 7. Instead you must save them as FLO files and convert them to templates within FlowCharter 7.

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Opening Documents

iGrafx *Professional* offers three 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 On the Welcome Dialog, click New Document, and then click Process or Basic Diagram.

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.



—Tips—



You can also use the shortcut key: CTRL+O or the Open button 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 iGrafx *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 iGrafx *Professional* departments, and their shapes are converted into activities within the appropriate departments.
- If iGrafx *Professional* finds links to other FlowCharter charts in the file, you will 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 will help 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.



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- 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 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.

Viewing Diagrams

iGrafx *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
 - 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 Click ESC to leave the full-screen view.

To view the Master Page

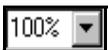
- ▶ On the View menu, click Master Page.

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.



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or

To always view the entire diagram, use View All.



—Tips—

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

Using iGrafx *Professional* Tools

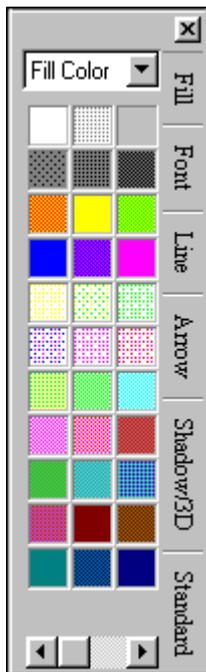
Several tools and commands exist in iGrafx *Professional* to help you change the appearance of diagram components, give you information about performing tasks, and split up the visible diagram space.

These tools include:

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

Using the 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.



Click the tabs to change formatting options. The Standard tab contains

To show or hide the Gallery

- ▶ On the View menu, click Gallery.

Using 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.



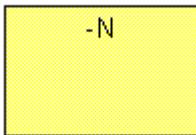
— Note —

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

Using 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.

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 Current Note.
- 5 Choose the print options you want.
- 6 Click OK.



— Tip —

In the Note window, wrapped text moves onto one line. To rewrap the text, point to the Note window border, press and hold the left mouse button, and drag the border out until the entire line of text appears (or drag the window border out and back to its former size).

Using 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, or an icon.
- Shapes that have notes attached to them can be indicated with text or a shadow.



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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.

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.

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, click the Shadow check box.
- 6 If you want to change the indicator style for nodes or intersections, choose a new style and color.
- 7 Click OK.

Using the 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.

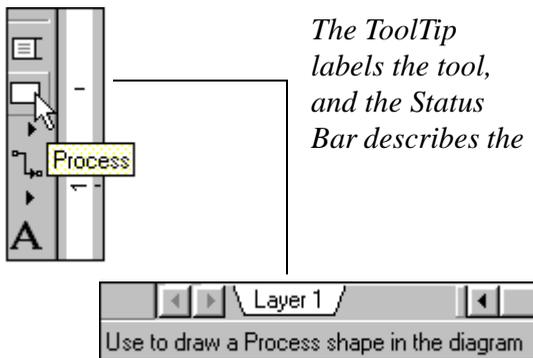
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To open the Output window

- ▶ On the View menu, click Output.

Using the 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.



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 iGrafx *Professional* window.

Using 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.

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.

Using 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 tile windows vertically or horizontally

- ▶ On the Window menu, click Tile Vertically or Tile Horizontally.

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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 iGrafx *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 iGrafx *Professional*.
- Find text occurrences in diagram shapes or notes, and replace them with a different word or phrase.

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.

Cutting, Copying, and Pasting

With iGrafx *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.

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

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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 On the Edit menu, click Paste Special.
- 3 Select the paste type (as text, picture) from the list.

- 4 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.

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.

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.

You can select an object beneath other objects. Click the Selector tool, press and hold CTRL, and click the top object. As you continue to click, each object below the top object is selected.

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.

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*.

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.



— Tip —

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.

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 displays 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.

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.

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- 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.

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 protect a diagram

- 1 On the Tools menu, click Protect Diagram.
- 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 diagram

- 1 On the Tools menu, click Unprotect Diagram.
- 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.

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.

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- 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, click 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 iGrafx *Professional* document or template, older FLO files, or a DRW file.
- **Save Workspace** - Saves your document as an iGrafx *Professional* 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.

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 iGrafx *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.

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.

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To save a workspace

- 1 On the File menu, click Save Workspace.
- 2 Type a name for the workspace file in the File Name text 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.

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.

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.

Saving as a Web Page

After you create a document in iGrafx *Professional*, you can publish it using Hypertext Markup Language (HTML) or Java applets. 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.

At the bottom of each Web page is an index of any other diagram links that were included.

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.

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.
- 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.

Distributing Documents

Distributing documents to team members, departments, and even other companies is a great way to communicate ideas and tasks. With iGrafx *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 iGrafx *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.

To open iGrafx Share Viewer

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

Sending Documents as E-mail Attachments

iGrafx *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 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.



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Setting Up a Diagram

This chapter covers the following topics:

- *Setting Up the Diagram Page* on page 106
- *Using Headers and Footers* on page 110
- *Using Guidelines and Grids* on page 111
- *Setting Up Departments* on page 114

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.



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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 (in inches).
- 4 Click OK.



Notes

iGrafx *Professional* rounds the numbers to the nearest hundredth of an inch or tenth of a centimeter.

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 Per Diagram, and set the overlap for extra taping room.

or

To print out multi-page diagrams that you can bind in a book, select Per Page.

To set the Print Notes option

- 1 On the File menu, click Page Setup.

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 iGrafx *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 iGrafx *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.

To add a horizontal guideline

- ▶ On the Arrange menu, point to Guidelines, and click Add Horizontal Guideline.



— 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

- ▶ On the Arrange menu, point to Guideline, and click Add Vertical Guideline.



— 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. Drag vertical guidelines to the vertical ruler.
- 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, iGrafx *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.
- 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.
- 3 Repeat the same procedure for lines and shadows/3D.

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.
The cursor changes to four arrows.
 - For horizontal departments, drag the department up or down to the desired position.
 - For vertical departments, drag the department left or right to the desired position.

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.



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

Working with Shapes and Lines

This chapter covers the following topics:

- *Using the Shape Library* on page 119
- *Placing Shapes in a Diagram* on page 123
- *Connecting Shapes with Lines* on page 125
- *Formatting Shapes and Lines* on page 132
- *Manipulating Shapes and Lines Together* on page 140
- *Working with Default and Preset Shape and Line Styles* on page 157
- *Working with Shape Fields* on page 164
- *Numbering Shapes* on page 168

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, and then click the arrow to display other shapes in the More Shapes flyout menu.



— 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.
- 3 In the Shape Library box, click Add.
- 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 2 through 5.
- 9 Click Close.

To add a shape to the Toolbox toolbar

- 1 In the Shape Library dialog box, click the box to the left of the shape you want to add to the Toolbox toolbar.
- 2 Click Close.

To remove a shape from the Shape Library

- 1 In the Shape Library, click the shape you want to remove.
- 2 Click Remove.
- 3 Click Close.



Notes

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 In the Shape Library, click the shape you want to edit.
- 2 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.

- 3 In the Shape Properties dialog box, make the changes.
- 4 Click OK.

To duplicate a shape in the Shape Library

- 1 In the Shape Library, click the shape you want to duplicate.
- 2 Click Duplicate.

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

- 3 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 the Shape Library dialog box. 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 the 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:

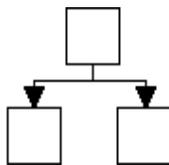
- Direct Line
- Right Angle Line
- Curved Line
- Org Chart Line

- Cause and Effect Line
- Lightning Bolt Line

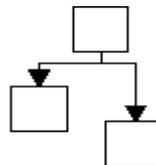
You can connect lines by dragging or clicking, and connect two shapes with a line. When you connect the shapes with a line, the end points of the line snap to the nearest connect points in the shapes.

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

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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 Format 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 line 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 also restore them automatically to their original position. To move lines back to their original position, use a 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 Diagram.
- 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 Format 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.



Formatting Shapes and Lines

Using the formatting options in iGrafx *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. See *Working with Default and Preset Shape and Line Styles* on page 157.

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.

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.

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.

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.

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

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.

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.

Applying Arrow and Crossover Formats

Arrowheads help indicate direction. iGrafx *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.



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.

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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 behind the lines or shapes. To bring the line to the front, click it, click Order, and then click Bring to Front button on the Draw toolbar.

You set the style and size of crossovers by clicking Connector Line on the Format menu, and then selecting the type and size you want. You also can choose the crossovers style by clicking the Crossovers tool on the Formatting Toolbar, and then clicking the type you want.



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 Shape 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 Shape dialog box, click the Arrows and Crossovers tab.
- 4 Select a crossover style and size.
- 5 Click OK.

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 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.

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- 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.

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- 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 Formatting toolbar to change the shadow direction.

Manipulating Shapes and Lines Together

iGrafX *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
- Make Same Size command
- Space Evenly command
- Rotate/Flip command
- Order command
- Combine command

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 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.

iGrafX *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.

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.

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.

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.

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.



— Tip —

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



Make Same Size, Width Make Same Size, Height



Make Same Size, Both Make Same Size, Fit to 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.

Command	Draw toolbar	Description
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.

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.



Tip

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



Space Evenly Across, Centers Space Evenly Down, Centers



Space Evenly Across, Edges Space Evenly, Down 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.

To rotate an object

- 1 Click the object you want to rotate.

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- 2 On the Arrange menu, point to Rotate/Flip, and click either Rotate Right or Rotate Left.



— Tip —

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



Rotate Right Rotate Left

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.



Tip

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



Flip Horizontal Flip Vertical

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.

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.



—Tips—

To select an object that is beneath other objects, press and hold CTRL, and click the top object. As you continue to click, the objects below the top object are selected.

You can also bring the object to front by clicking the Bring to Front tool on the Draw toolbar.



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.



—Tips—

To select an object that is beneath other objects, press and hold CTRL, and click the top object. As you continue to click, the objects below the top object are selected.

You can also send the object to back by clicking the Send to Back tool on the Draw toolbar.



Combine command

Command	Draw toolbar	Description
Group		Groups selected objects.
Ungroup		Ungroups selected objects
Connect Closed		Connects the selected closed objects.
Connect Open		Connects the selected open objects and closes them.
Disconnect		Disconnects the selected connected objects.

Command	Draw toolbar	Description
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.

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 group.
- 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.



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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.

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- 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 —

The Slice command is used only when you are using an open object to slice through a closed object. The Slice command is not available if you select two open objects.



— Tip —

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



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 enter the distance you want between the shape and the first right angle of a horizontal line.
- 4 Click the Vertical box, and enter 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, click the ruler with your right mouse button, select Measurement, 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 add a preset shape style



- 1 Click the Add Shape Style 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 In the Preset Styles dialog box, click Rename.
- 6 Type a new name for the shape style.

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7 Click OK.

8 Click OK.



— Tips —

You also can add a shape style to the list by selecting a shape with the desired style in steps 2 and 3. If you select multiple shapes, the Add Style tool is inoperative.

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.



— Note —

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 and to future shapes.



— Tip —

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 add a preset line style



- 1 Click the Add Line Style tool on the Preset Styles toolbar.
- 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 In the Preset Styles dialog box, click Rename.
- 7 Type a new name for the line style.
- 8 Click OK.
- 9 Click OK.



— Tip —

You can add a line style to the list by selecting a line with the desired style in steps 2 and 3. If multiple lines are selected, the Add Style tool is inoperative.

You can also add a line style to the list using the Preset Styles command on the Format menu.

To choose a preset line style

- 1 Select the line(s) to which you want to apply the style.
- 2 Click the Line Styles drop down 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 and to future lines.

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

To rename a preset line style



- 1 In 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.



— Tip —

You can also rename a preset line style by clicking the Preset Styles command on the Format menu, clicking the Line tab, selecting the line style, and clicking Rename.

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.



— Tip —

You can also delete a preset line style by clicking the Preset Styles command on the Format menu, clicking the Line tab, selecting the line style, and clicking Delete.

To set shape and line defaults using the Shape Library

- 1 Select a shape in the Shapes list.
- 2 Click Edit.
- 3 In the Edit Shape dialog box, clear the Use Diagram Default Format box under Shape Defaults.
- 4 Click Format.



— Note —

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

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

- 7 In the Shape Library, click Close.

To set shape and line defaults using Share *Media*

- 1 Click on a Share Media subject tab in the Gallery.
- 2 Right mouse click on 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 iGrafx *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.



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- 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 moving the shape field text from its set position in or around the shape, 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

iGrafX *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.

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- 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.



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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.

Working with Text

This chapter covers the following topics:

- *Creating and Manipulating Text* on page 173
- *Formatting Text* on page 179
- *Working with Default and Preset Text Styles* on page 184

Creating and Manipulating Text

Five types of text exist in iGrafx *Professional*:

- **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 indention.

New Text Features

iGrafx *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 entering 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:



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- 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 in the text block. 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.

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To select text

- ▶ Click the shape or text block you want.



—Tips—

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

iGrafX *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.



Bullets Tool

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.



— Note —

You can also use the Decrease Line Spacing and Increase Line Spacing tools on the Formatting toolbar.



Decrease Line Spacing tool Increase Line Spacing tool

- 4 Click OK.

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 is highlighted in blue 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 OK.

To align text blocks

- 1 On the Format menu, click Text Alignment.

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- 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 In the Shape Library, select a shape in the Shapes list.
- 2 Click Edit.

- 3 In the Edit Shape dialog box, clear the Use Diagram Default Format box under Shape Defaults.
- 4 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.

- 5 On the Font tab, select a font from the Font list, and then click OK.
- 6 In the Edit Shape dialog box, click OK.
- 7 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 on a Share Media subject tab in the Gallery.
- 2 Right mouse click on 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.

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- 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.



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Drawing Graphics

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This chapter covers the following topics:

- *Understanding Differences between Graphics and Shapes* on page 189
- *Drawing Graphics* on page 190
- *Manipulating Graphics* on page 192
- *Drawing Callout Lines* on page 195

Understanding Differences between Graphics and Shapes

Understanding the differences between a graphic and a shape helps you use shapes more effectively. In *iGrafX 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 connection lines to connect between shapes. Connect lines from other shapes to them.

Graphics	Shapes
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

iGrafx *Professional* contains several options for drawing graphical shapes and lines. These options include:

- Square
- Rounded Square
- Rounded Rectangle
- Circle
- Ellipse

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- 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 Formatting 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 turns blue, 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.

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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.

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To move a graphic

- 1 Click the graphic.
- 2 Move the pointer inside the graphic.
The pointer changes to four arrows.
- 3 Click inside the graphic and drag it to a new position.
- 4 Release the mouse button.

To resize a graphic

- 1 Click the graphic.
- 2 Left mouse click any of the black squares surrounding the graphic.
- 3 Without releasing the mouse button, drag the square.
- 4 Release the left mouse button.
- 5 To finish resizing the graphic, click outside of it.

To rotate a graphic



- 1 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.
- 2 Click one of the green circles.
- 3 Without releasing the left mouse button, rotate the graphic to the desired position.
- 4 Release the left mouse button, and then click the Finished button.

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To reshape a graphic



- 1 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.
- 2 Click one of the white circles.
- 3 Without releasing the left mouse button, drag the reshape point to a new position.
- 4 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.

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- 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 Hidden Lines on the View menu.

Organizing Diagrams

This chapter covers the following topics:

- *Working with Diagram Types and Components* on page 197
- *Working with Layers* on page 201

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 iGrafX *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 when simulating a process.
- **Scenario-** Contains set up information for simulating a process using iGrafX Process.

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- Report- Contains the results of simulating a process using iGrafx Process.



— Note —

Scenario and Report components are used with iGrafx Process. If you used iGrafx Process to run a simulation, you can select and view scenario and report data in iGrafx 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.
- 3 Note You can only create a scenario or report if you have one process in your document.
- 4 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 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.

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- 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 *iGrafx 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.



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- 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 Manger** - 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 *iGrafX 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.



— Tip —

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.



— Note —

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



— Tips —

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.



— Note —

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



— Tip —

You also can use the Layer Manager button 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.



— Tip —

You also can use the Layer Manager button 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.



—Tip—

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.



—Tip—

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.



—Tip—

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.



— Note —

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.



— Tips —

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.

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.

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

- 2 Click OK.



— Note —

You can print hidden layers unless they are also nonprintable.



— Tips —

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 button 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 the layer or change the current layer to an unlocked layer.



— Tips —

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

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



Linking Diagrams

This chapter covers the following topics:

- *Linking and Embedding from Other Applications* on page 211
- *Inserting an Embedded Object* on page 212
- *Dragging and Dropping* on page 216
- *Linking Shapes to Other Diagrams or Web Pages* on page 221

Linking and Embedding from Other Applications

OLE is a protocol that is used by many Windows applications to exchange information. iGrafx *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 iGrafx *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 iGrafx *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 iGrafx *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

- ▶ 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 on it in the iGrafx *Professional* diagram.

To convert an embedded object to a different format

- ▶ 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.

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 iGrafx *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 iGrafx *Professional*, and click Paste Special on the Edit menu.
- 5 In the Paste Special dialog box, select Paste or Paste Special.
Paste- Embeds the object.
Paste Special- 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 Edit menu, click OLE Links.
- 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.

- 4 Click OK.

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 iGrafx *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 Use the right mouse button to 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 Use the right mouse button to 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

Use the right mouse button to click the linked shape, and then click the named link at the bottom of the menu.

or

Use the right mouse button to 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 Use the right mouse button to 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 OK.
- 5 In the Properties dialog box, click OK.

To add advanced link settings

- 1 Open the diagram that you want to link to.
- 2 Use the right mouse button to click the shape that you want to be the starting point of the diagram, and then click Properties.
- 3 In the Properties dialog box, click the Inputs tab.
- 4 Select the Start Point box, and click OK.
- 5 Open the diagram that contains the shape you want to link.
- 6 Use the right mouse button to click the shape, and then click Properties.
- 7 Click the General tab, and then select the link in the Links box.
- 8 Click Edit.
- 9 In the Change Link dialog box, click Advanced.
- 10 In the Advanced Link Settings dialog box, select Start from the Start Point box.

- 11 To accumulate custom data attached to the shape, select Accumulate Custom Data.
- 12 Click OK.
- 13 In the Change Link dialog box, click OK.
- 14 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, 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.



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



Using Advanced Diagramming Features

This chapter covers the following topics:

- *Working with Custom Data* on page 227
- *Working with Visual Basic for Applications* on page 230
- *Working with iDiagrams* on page 232
- *Working with SPC Charts* on page 233
- *Working with iGrids* on page 236

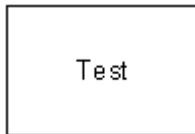
Working with Custom Data

iGrafx *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.

Field	Elements
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 Click the Custom Data tab, and then click Setup.

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- 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. See *Working with Shape Fields* on page 164.

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 on 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

iGrafx *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 iGrafx 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.

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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.
 - 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 Tool menu, point to iDiagram, and click Execute.

Working with SPC Charts

iGrafx *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



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- 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 iGrafx *Professional* and DataAnalyzer:

- Process charts
- Cause-and-effect (Ishikawa or fishbone) charts
- Organization charts
- Deployment charts
- Pareto charts
- Histograms
- Run charts (trend charts)

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- 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 iGrafx *Professional*:

iGrid	Description
Pyramid	Shows hierarchical lists, such as those illustrating business values and goals or customer requirements.
Basic CoolSheets	Shows a grid of squares in the diagram. The grid enables you to place objects in precise positions.
Block CoolSheets	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.

iGrid	Description
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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