Creating Flowcharts in Microsoft Office

Microsoft Word, PowerPoint, and Excel all have built-in features which make it easy to create flowcharts. The particular method outlined below provides a great deal of flexibility for creating customized charts, and it includes the ability to link flowchart boxes for easy maneuverability.

Creating a Chart

Simply speaking, creating a chart requires three steps: creating shapes, adding text, and creating connecting lines.

Creating Shapes

1. Open the Microsoft Office program of your choice (Word, PowerPoint, or Excel).
2. Make sure the Drawing toolbar is visible. It is generally located along the bottom of the program window. (If not visible, go to View > Toolbars > Drawing.)
3. On the Drawing toolbar, select the "AutoShapes" button to view the AutoShapes menu.
4. Go to "Flowchart." Pause over any Flowchart shape for its description (see right).
5. Select the shape of your choice. (You can select from the Flowchart shapes or from any of the other shape categories within the AutoShapes menu, including "Basic Shapes," "Block Arrows," etc.)
6. IN MICROSOFT WORD ONLY: A drawing canvas that states "Create your drawing here" should automatically appear when you select your first shape. If it does not, go to Insert > Picture > New Drawing and draw your flowchart in the drawing canvas that appears. (It is possible to draw a chart without the drawing canvas, but in order for specific flowchart features to work, the chart must be drawn on the drawing canvas.)
7. Create the shape of your choice as desired. (Click, drag the shape to the desired size, and release the mouse.)
8. Create additional shapes as needed. (Copy and paste to create identically sized shapes.)
Your mouse pointer will change its shape and appearance as you are able to perform different tasks, and thus it serves as a great clue for what you can do at any given time.

To **move** a shape, place your pointer over the image and it will become a pointer arrow with a four-way directional arrow at its tip (right). Click on the image and drag it to the location of your choice. (The pointer will disappear while you drag the image, but the four-way directional arrow will remain).

To **resize** a shape, first click on the image. Eight round "handles" will appear on the edges and corners of the image (shown at left). Move your pointer to one of those handles until you see one of the two-way directional arrows (below). Click and drag the image to the new size of your choice.

### Adding Text

1. Right-click on a shape and select "Add Text."

2. Enter the text of your choice.

3. Modify the text as you typically would using the options on the Formatting toolbar.

### Drawing Connectors

1. To create connecting lines, select "Connectors" from the AutoShapes menu and select a connector of your choice.

2. Move your cursor around one of the AutoShapes. Blue marks should appear around the outside of the AutoShape ("connection sites" shown at right).

3. Click on one of the connection sites, then move to a second AutoShape and click the second connection site.

### Customizing Your Chart

To modify your chart, perform any of the following tasks.

- **EDIT THE SHAPE**
  Select a shape (or multiple shapes) and change the Fill Color, Line Color, or Line Style using the appropriate buttons on the Drawing toolbar.

- **ALIGN SHAPES**
  To align a group of shapes, select all desired shapes. On the Drawing toolbar, select **Draw > Align or Distribute** and choose the appropriate alignment option.
• **RESIZE SHAPES**
  If you wish to resize your shapes so that all are an equal size, you can do one of two things:
  
  a. *If the shapes are the same size to begin with and you simply want to make them all smaller or larger, select all of the shapes which you wish to resize. Then resize one shape. Every shape that is selected will change as well.*
  
  b. *If the shapes are different sizes, select each one individually. Right-click on the shape and select "Format AutoShape." Click on the Size tab, and enter the height and width of your choice. Click "OK" when finished.*

**Troubleshooting: It’s not working!**

• *The connecting lines won’t stay attached to the shapes.*

  When moving shapes around the chart, the connecting lines should stay attached to the shapes. If they don’t, it is likely because the connecting lines are not actually attached to connection sites. To check, select the connecting line. A red dot at the end of the line indicates that it is connected to a connection site. A green dot indicates that it is not connected to a connection site. (See example at right.)

• *Connection sites don’t appear when I try to draw the connecting lines.*

  (Microsoft Word only) The connection sites will only appear if you are working inside of a drawing canvas. See step #6.