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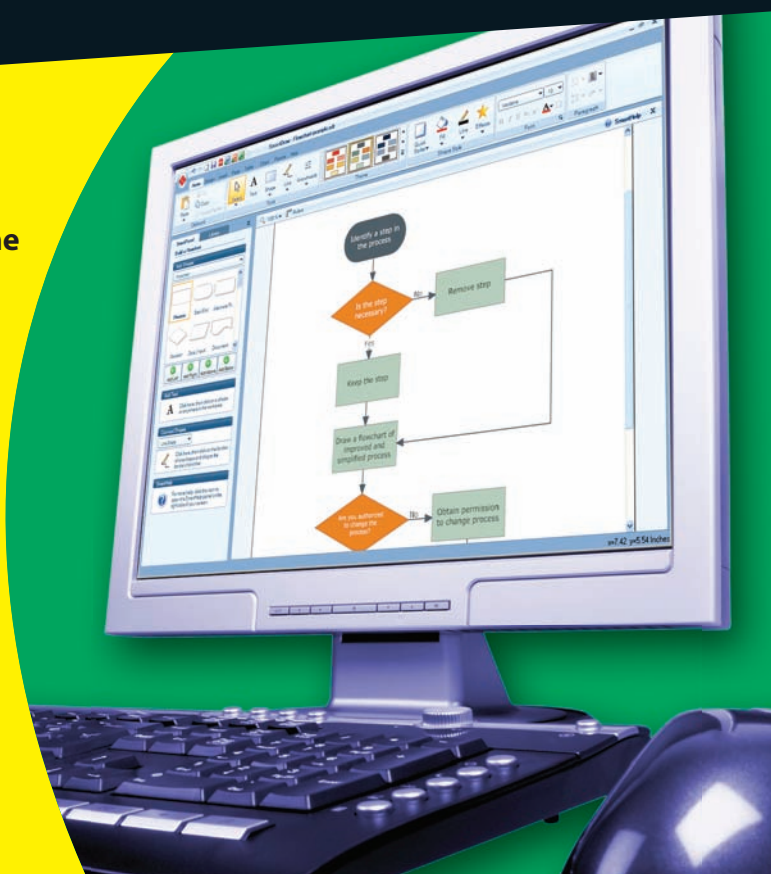

SmartDraw® FOR DUMMIES®

by Daniel Hoffmann and Doug Lowe

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Doug Lowe has been writing computer books since 1981, including nearly 40 *For Dummies* books, among them *PowerPoint 2007 For Dummies* and *Word 2007 All-in-One Desk Reference For Dummies.* He lives in sunny Fresno, California, where the motto is "Fres-YES!," (unfortunately, that's true) with his wife, the youngest of his three daughters, and a couple of dogs (a goofy-looking six-month-old Shar-Pei/Black Lab mix named Lucy and a yellow lab named Odie). He's one of those obsessive-compulsive decorating nuts who creates computer-controlled Halloween decorations that rival Disney's Haunted Mansion.

Dedications

Daniel Hoffmann: This book is dedicated to my three true loves, Susanne, Ashley, and Roxy, and to my family and friends who have always been there for me and given me more support than I could ever imagine.

Doug Lowe: To Debbie.

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Introduction

Welcome to *SmartDraw For Dummies,* the book written especially for those who are lucky enough to have discovered the best business graphics program on the market and want to find out how to use it in time to finish that report, sales presentation, or product brochure that was due yesterday.

Have you ever needed to create a graph of recent sales trends, but you didn't want to create another cheesy, boring Excel graph that looks just like every other graph you've seen at every other sales meeting you've ever been to?

You need SmartDraw!

Have you ever been put in charge of a project and didn't want to invest hundreds of dollars in sophisticated project management software, such as Microsoft Project, just to create a simple project schedule?

You really need SmartDraw!

Have you ever wanted to rearrange the furniture and equipment in your office and didn't want to spend *thousands* of dollars on AutoCAD just to draw a simple floor plan?

You *desperately* need SmartDraw!

Whichever your business graphics needs, you've found the perfect book, and you're holding it right now in your formerly magic-marker-stained hands. Help is here, within these humble pages.

This book talks about SmartDraw in everyday — and often irreverent — terms. You'll find no lofty prose within these pages; the whole thing checks in at about the fifth-grade reading level. We have no Pulitzer expectations for this book; we leave that ambition for the Woodwards and Steinbecks among us.

Our goal here is to simply get you going as quickly as we can with the most powerful and easy to use business graphics software ever created. And hopefully, this journey of learning won't be a tedious or miserable experience — in fact, maybe it will even be kind of fun.

About This Book

This isn't the kind of book that you pick up and read from start to finish as though it were a cheap novel. If we ever catch you reading it at the beach, we'll kick sand in your face. Or better yet, we'll get Clint Eastwood and have *him* kick sand in your face. You'll listen to him.

This book is more like a reference book than a novel. It's the kind of book you can pick up, turn to just about any page, read for a page or two, and learn something useful. It has 22 chapters, each one covering a specific aspect of using SmartDraw, like printing, creating flowcharts, or transforming a SmartDraw graphic into a PowerPoint animation.

Each chapter is divided into self-contained chunks, all related to the major theme of the chapter.

For example, the flowchart chapter contains nuggets like these:

- Looking at flowcharts
- Understanding all the shapes used in flowcharts
- Creating a basic flowchart
- Splitting paths
- Creating cross-functional flowcharts with swim lanes

You don't have to memorize anything in this book. It's a need-to-know book: You pick it up when you need to know something. Need to know how to create an organization chart? Pick up the book. Need to know how to create a table? Pick up the book. After you find what you're looking for, put it down and get on with your life.

How to Use This Book

This book works like a reference. Start with the topic that you want to find out about: To get going, look for it in the table of contents or in the index. The table of contents is detailed enough that you should be able to find most of the topics that you look for. If not, turn to the index, where you find even more detail.

When you find your topic in the table of contents or the index, turn to the area of interest and read as much or as little as you need or want. Then close the book and get on with it.

This book is loaded with information, of course, so if you want to take a brief excursion into your topic, you're more than welcome. If you want to know all about the techniques for creating floor plans, read the chapter on floor plans. If you want to know all about applying color to a shape, read the chapter on color and design themes. Read whatever you want. You paid good money for this book, so read every word if you want. (Just not at the beach.)

On occasion, this book directs you to use specific keyboard shortcuts to get things done. When you see something like "Press Ctrl+Z," this instruction means to hold down the Ctrl key while pressing the Z key. (Don't type the plus sign.) Then release both together.

Sometimes we tell you to use a command that resides on one of the main toolbar's tabs. (SmartDraw uses a ribbon interface similar to those in Microsoft Office applications.) We tell you exactly how to find the command. For example, we might tell you something like this: On the main toolbar, click the Chart tab, find the Insert Chart group, and click the New Chart button.

Another nice feature of this book is that whenever we discuss a certain button that you need to click in order to accomplish the task at hand, a picture of the button appears in the margin. This way, you can easily locate it on your screen.

What You Don't Need to Read

Some parts of this book are skippable. We carefully place extra-technical information in self-contained sidebars and clearly mark them so that you can give them a wide berth. Don't read this stuff unless you just gots to know. Don't worry; we won't be offended if you don't read every word.

Foolish Assumptions

We make only three assumptions about you:

- You use a computer.
- It's a Windows computer — not a Mac.
- You use or are thinking about using SmartDraw.

Nothing else. We don't assume that you're a computer guru who knows how to change a controller card or configure memory for optimal use. These types of computer chores are best handled by people who like computers.

Hopefully, you're on speaking terms with such a person. Do your best to stay there for those times when you're working with computer stuff that's more difficult than SmartDraw.

How This Book Is Organized

Inside this book are chapters arranged in five parts. Each chapter is divided into sections that cover various aspects of the chapter's main subject. The chapters have a logical sequence, so it makes sense to read them in order, if you want. But you don't have to read the book that way; you can flip it open to any page and start reading.

The following sections give you the lowdown on what's in each of the five parts:

Part I: Getting Started with SmartDraw

In this part, you review the basics of using SmartDraw. This is a good place to start if you've never used SmartDraw, or if you've used it a few times but feel lost every time. Its five chapters take you on a tour of the SmartDraw windows and controls, walk you through creating a simple drawing from start to finish, tell you how to create simple shapes and lines and add text to them, and tell you what you need to know about printing your drawing.

Part II: Embellishing Your Graphics

The chapters in this part show you how to make business graphics that look good. SmartDraw is actually pretty good at that, but it helps to know about its powerful features for applying color, fancy effects, and design themes, as well as how to add interesting things such as tables and images to your drawings. You also find out how to work with layers, one of SmartDraw's most powerful features for more complicated drawings.

Part III: Creating Business Graphics

The chapters in this part focus on the most common types of graphics you can create with SmartDraw. We tell you how to work with charts, including bar charts, line charts, pie charts, flowcharts, organization charts, and project charts. We also give you instructions for creating floor plans, mind maps, and Live Maps.

Part IV: Using SmartDraw with Microsoft Office and the Web

One of the best features of SmartDraw is the way it integrates with Microsoft Office and the Internet. The first two chapters in this part show you how to use SmartDraw's Office integration features, which let you easily transfer drawings from SmartDraw into Word, Excel, or PowerPoint. You also find out how to take your SmartDraw creations to the Web.

Part V: The Part of Tens

This wouldn't be a *For Dummies* book without lists of interesting snippets. Thus, you find chapters with titles such as Ten SmartDraw Commandments, Ten Odd and Unusual SmartDraw Templates, Ten Tips for Creating Great Business Graphics, and Ten Things You Didn't Think to Use SmartDraw For.

About the CD

The CD that comes with this book contains lots of stuff to help you be productive with SmartDraw. It includes a 30-day, fully functional trial version of SmartDraw 2009. There are also many example files that you can use as you go through the book. There are also some reference materials, including the Encyclopedia of Business Graphics poster in PDF format and a number of SmartDraw best practice PowerPoint presentations.

Icons Used in This Book

As you're reading all this wonderful prose, you occasionally see the following icons. They appear in the margins to draw your attention to important information. They're defined as follows:

Watch out! Some technical drivel is just around the corner. Read it only if you have your pocket protector firmly attached.

Pay special attention to this icon — it tells you that some particularly useful tidbit is at hand, perhaps a shortcut or a way of using a command that you might not have considered.

Danger! Danger! Danger! Stand back, Will Robinson!

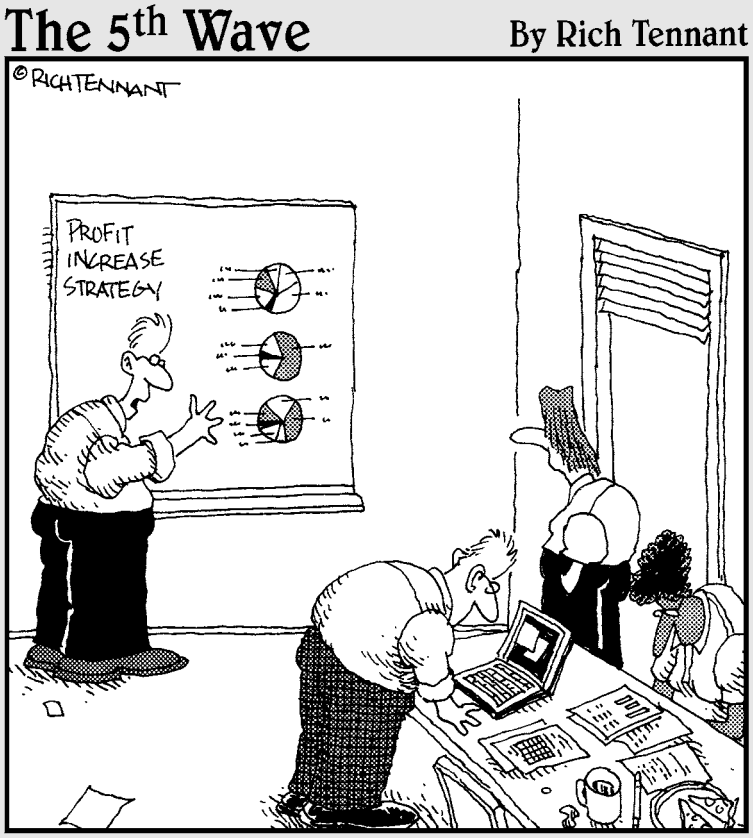
Did we tell you about the memory course we took?

Where to Go from Here

Yes, you can get there from here. With this book in hand, you're ready to charge full speed ahead into the strange and wonderful world of desktop drawings. Browse through the table of contents and decide where you want to start. Be bold! Be courageous! Be adventurous! Above all else, have fun!

Part I

Getting Started with SmartDraw



"Look-what if we just increase the size of the charts?"

In this part . . .

Once upon a time, the term business graphics meant bar charts and pie charts. But now that you've decided to equip your software arsenal with SmartDraw, business graphics can mean so much more. With SmartDraw, you can create literally hundreds of different kinds of graphics — business or otherwise. SmartDraw can create a graphic to fill just about any need you can imagine — from flowcharts and organization charts to floor plans and mapping.

The chapters in this part comprise a bare-bones introduction to SmartDraw. You find out exactly what SmartDraw is and how to use it to create drawings and graphics. You discover how to create and edit simple shapes, how to work with text, and how to print your masterpiece.

More advanced stuff such as working with themes or using the advanced tools for creating specific types of graphics like flowcharts and floor plans is covered in later parts. This part is just the beginning. As a great king once advised, "It's best to begin at the beginning and go on until you come to the end; then stop."

Chapter 1

Welcome to SmartDraw

In This Chapter

- Introducing business graphics
- Considering how business graphics differ from other types of graphics
- Finding out what kinds of business graphics you can create with SmartDraw

Welcome to SmartDraw, a program that lets you create professional-quality business graphics even if (or maybe *especially* if) you aren't a professional business graphic artist.

Sure, you can use many programs to create business graphics. You may even already own some of them. But most of these programs are limited to just one or two specific types of business graphics. For example, Microsoft Excel can create pie charts, bar charts, and the like. But Excel isn't very good at creating project charts to schedule the various phases of a project. You can use Microsoft Project to do that, but Project isn't very good with floor plans or schematics. AutoCAD is really good with floor plans and schematics, but . . . well you get the idea.

In contrast, SmartDraw is a tool for creating just about any type of business graphic you might imagine. In fact, SmartDraw can create literally hundreds of different types of business graphics, from area charts to yearly calendars. (Sorry. There isn't a business graphic that starts with the letter *z* — but if there were one, we guarantee SmartDraw could create it!)

This chapter is a gentle introduction to this powerful program. It begins with an overview of what business graphics are all about. Then, it jumps into the basics of working with SmartDraw. When you finish this chapter, you'll have a good idea of the range of business graphics SmartDraw can create, and you'll be ready to use it to create them.

You, Too, Can Create Business Graphics

In today's business world, few people take the time to read 100 words, let alone 1,000. In the era of text messaging, sometimes even just ten words are too many.

That's why we use business graphics. Often, you can find no other way to make your point clearly, persuasively, or powerfully than with a carefully chosen image. Business graphics have the power to convince others and to explain at a glance something that can be difficult or even impossible to express in words.

Now, you may balk at the term *business graphics.* Your first response might be, "Not for me! Fancy business graphics are great for big Fortune 500 companies, but my business is small enough that I don't need 'em."

Or maybe your response is, "Business graphics would be great if I had half an ounce of artistic ability. But every diagram I ever tried to create looks like it was drawn by a third grader."

Or maybe: "I wish I had the budget to hire a professional graphic designer to add some polish to my reports and proposals, but the simple charts I create with Excel will have to do."

Although you may not realize it, you probably use business graphics all the time. And not just simple pie charts you've thrown together quickly with Excel. You've created business graphics over the years, if you've done the following:

- Sketched a few boxes with names in them to show the chain of command in your business. If so, you've drawn an *organization chart,* one of the most common business graphics. (Hopefully, your name was in the box at the top.)
- Planned your office's layout by sketching some lines to represent the walls, then drawn some rectangles to show where you want desks, chairs, and shelves. If so, you've created a *floor plan.* (Hopefully, your office was the one in the corner, with the big window overlooking the lake.)
- Drawn lines through a calendar to show how long it should take to complete various stages of a project. If so, you've created a *Gantt chart.*
- Sketched the steps necessary to complete a task such as filling out and submitting a medical insurance claim, using boxes to represent the steps and arrows to show how one step flows to the next. If so, you've created a *flowchart.*

Then, maybe you've taken the tools that happen to be lying around — typically Word, Excel, or PowerPoint — and dropped a few clumsy rectangles or circles on the page, plopped down some text to explain what the shapes represent, and then scratched out some lines to connect things together.

So you see, you've been creating business graphics all along. But you've been doing it the hard way. You've used crude drawing tools to create things that the tools were never intended to create, and you might have spent most of your time trying to get things to line up or be the right size or color. Then maybe you've added some cheesy clip art or shadow effects in an attempt to make your drawing look halfway decent.

Most of the time, what you end up with is a drawing that barely communicates the message you originally intended, is difficult to make even the slightest change to later on, and looks terrible.

That's where SmartDraw comes in. Unlike most other programs, SmartDraw doesn't consider business graphics an afterthought. The whole point of SmartDraw is to create sensational business graphics — not just graphics that look good, but graphics that, in some cases, practically draw themselves because they have built-in intelligence.

And SmartDraw isn't limited to just one kind of business graphic. It's designed to create dozens of different kinds of business graphics. When you learn how to use the core set of drawing tools presented in the first eight chapters of this book, you'll be able to draw just about any kind of business graphic imaginable.

Comparing SmartDraw to Other Drawing Programs

Before we get too far into how SmartDraw works and what you can use it for, we need to point out some key differences between SmartDraw and other kinds of drawing programs.

To start, realize that SmartDraw is designed to create business drawings, not artistic or technical drawings. The best known examples of artistic drawing programs are Adobe Illustrator and CorelDraw. These programs are designed to be used by professional artists and photographers to create professional-quality art. Adobe Illustrator and CorelDraw are sometimes used in business to create the more artistic variety of business graphics, such as company logos, flyers, posters, and so on. But their primary purpose is artistic, and their primary users are professional graphic artists.

The best known technical drawing program is AutoCAD, made by Autodesk. Drafting and computer-aided design (CAD) programs are designed to create precision technical drawings that represent real-world objects, such as buildings, bridges, or roller coasters.

Give me a vector, Victor!

One useful way to classify drawing programs is the distinction between bitmap and vector drawing programs. SmartDraw is a vector-based drawing program.

Here's the skinny:

- A *bitmap* drawing program is a program that treats graphics as a big collection of dots called *pixels*. Bitmap images are also referred to as *raster images*. Adobe Photoshop is the best-known example of a bitmap graphics program.
- A *vector* drawing program is a program that treats graphics as actual shapes rather than as a group of pixels. The program keeps track of all of the characteristics that make up each shape in a drawing, such as the type of shape (for example, a circle, rectangle, line, and so on), as well as other properties like the exact size and position of the shape, the shape's color, and so on.

There are advantages and disadvantages to both types of drawings. Bitmaps are usually best suited for photographs and other types of artistic drawings. Vector images are best suited for business graphics and technical drawings.

The key difference between a bitmap drawing program and a vector drawing program is that when you draw an object in a bitmap program, the drawing doesn't keep track of any information about the object except the pattern of pixels required to display the object. For example, a bitmap drawing program doesn't know that a circle is actually a circle or that a line is actually a line. Instead, everything in the entire image is just a big blob of dots.

In contrast, a vector drawing program is essentially a database that keeps track of information about all the various shapes that make up the drawing.

An important consequence of this is that you can easily scale vector drawings. With a bitmap image, the picture becomes coarser the more you zoom in. If you zoom in far enough, the image becomes a big blur of dots. In contrast, you can enlarge (or reduce) a vector drawing as much as you want and it still remains perfectly clear.

Note that the distinction between bitmap and vector drawing programs isn't absolute. In particular, vector drawing programs can include bitmap images embedded within the drawing. You learn how to incorporate bitmap images into your SmartDraw business graphics in Chapter 8.

Both of these types of drawing programs require great artistic or technical skill. And they both have a long learning curve to master. Plop a typical computer user down in front of a program like Photoshop or AutoCAD and he or she will spend hours just trying to figure out basic things like how to draw a simple rectangle or how to select an object that appears to be sitting in plain view. These are powerful programs, but they're anything but easy to use.

SmartDraw doesn't fit into either of these two categories. Although you can use SmartDraw to create drawings that are artistically pleasing and encompass some degree of technical precision, SmartDraw has an entirely

different purpose than Photoshop or AutoCAD. SmartDraw is designed to create a wide variety of commonly used business graphics, diagrams, and charts using lines, simple and complex geometric shapes, and other ready-made objects that you can simply drag and drop onto your drawings.

Here are some of the key features that set SmartDraw apart from other types of drawing programs:

- **SmartDraw comes with hundreds of predefined drawing templates that you can start from to create just about any kind of business graphic.** And we really mean hundreds — it has more than 1,900 templates in all. In fact, one of the most challenging aspects of using SmartDraw is choosing the perfect template for your drawing from among the vast array of templates.
- **SmartDraw is a *vector-based* program.** It keeps track of the individual shapes that make up a drawing rather than the individual dots that make up a picture. (For more information, see the sidebar, "Give me a vector, Victor!")
- **SmartDraw requires very little artistic skill to create great-looking drawings.** Throughout the program, you'll find features designed to help you create drawings that look professionally drawn. Most of the time, all you have to do is drag and drop predefined elements onto a predefined template and apply predefined formats and themes.
- **One of the most important features of SmartDraw is its built-in intelligence — that is, the *Smart* in *SmartDraw*.** Most graphics programs are little more than digital versions of an artist's tools: canvas, paint, brushes, easel, and so on. The tools are great, but you're on your own to use them to create something worth looking at. In contrast, SmartDraw contains intelligence that actually helps you draw your graphics. It's almost as if a skilled graphic artist is sitting next to you, nudging your mouse in the right direction as you create your graphics.

  You'll see plenty of examples of this intelligence throughout SmartDraw. For example, when you create an organization chart, the software takes care of the tedious task of connecting the boxes to each other with lines. All you have to do is drop the boxes onto the page in their approximate locations; SmartDraw snaps the boxes into the exact right spot, then automatically draws the connecting lines.
- **SmartDraw is less expensive than other graphics programs.** Last time we checked, Microsoft Visio sells for about $400; Adobe Illustrator about $600; and AutoCAD LT — the simplified version of AutoCAD — is nearly $1,000. In contrast, you can purchase SmartDraw for under $300.

Knowing What You Can Do with SmartDraw

SmartDraw is a powerful program that you can use to create any type of business graphic you can conceive of. If you haven't opened SmartDraw yet and looked at the list of templates in the left-hand panel, you might want to try it now. You find the following categories:

Accounting & Finance
BPM & Six Sigma
Calendars
Cause & Effect
Certificates
Charts
Decision Trees
Education
Engineering
Event Planning
Family Trees
Financial & Estate Planning
Floor Plans
Flowcharts
Flyers
Forms
Gantt Charts
Human Resources
Landscaping
Maps
Marketing Charts
Mind Maps
Network Design
Org Charts
Project Management
Retail & Planograms
Simple Diagrams
Software Design
Storage Design
Storyboards
Strategic Planning
Timelines
Web Design

This list doesn't even include the subcategories that are found within most categories. For example, you'll find seven subcategories under Human Resources, including Employment Forms and HR Scorecards. And under Marketing Charts, you'll find 34 subcategories, including Affinity Diagrams, Competition Matrix, Competitive Analysis, Marketing Trends Summary, Strategy Maps, and Venn Diagrams.