

SmartArt refers to the range of graphics available in Word that you can use to create diagrams, such as flow charts, process charts, organisation charts, and the like. Select a SmartArt graphic from the gallery and then customise it to suit your needs. SmartArt helps you to create professional-looking diagrams in minutes.

In this session you will:

- ✓ gain an understanding of **SmartArt**
- ✓ learn how to insert a **SmartArt** graphic
- ✓ learn how to insert text into a **SmartArt** graphic
- ✓ learn how to add shapes below the active shape
- ✓ learn how to add shapes above the active shape
- ✓ learn how to add shapes before and after the active shape
- ✓ learn how to add an assistant
- ✓ learn how to promote and demote positions in a hierarchy
- ✓ learn how to switch a **SmartArt** graphic from right to left
- ✓ learn how to position **SmartArt**
- ✓ learn how to resize **SmartArt**
- ✓ learn how to apply a different layout
- ✓ learn how to apply a colour scheme
- ✓ learn how to apply a **SmartArt** style
- ✓ learn how to delete shapes from a **SmartArt** graphic.

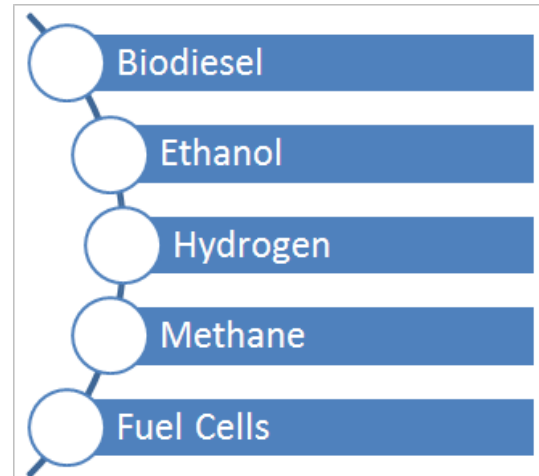
UNDERSTANDING SMARTART

SmartArt allows you to visually communicate your important ideas and information. For example, you can use SmartArt graphics to depict processes, hierarchies, relationships and

so on. By using SmartArt to communicate information, you can create visually-appealing diagrams that can say so much more than words alone.

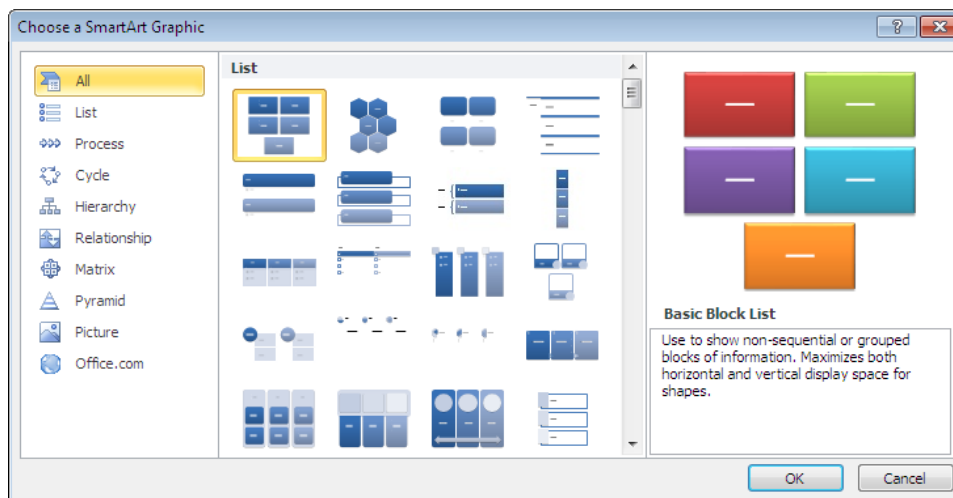
How To Use SmartArt

SmartArt can be a simple flowchart depicting a process or a complex arrangement of shapes and lines used to show relationships. To work with SmartArt, simply select a **layout** from the SmartArt gallery that most closely represents the way you want to structure your information, and then customise the SmartArt graphic by adding text and formatting shapes. The picture to the right is an example of a SmartArt graphic used to list a range of complementary fuels. Presented in this way, dry subject matter suddenly becomes an interesting read.



The SmartArt Gallery

SmartArt graphics are available from the SmartArt gallery. Click on a **category** in the left pane to view a range of **layouts** for that category in the centre pane. Click on a layout to **preview** it in the right pane.



There are eight categories of SmartArt graphics in the SmartArt gallery.

- **List:** For items without a sequence, such as a list of key objects or concepts.
- **Process:** For items or steps with a specific sequence and end point.
- **Cycle:** For steps with a continuing sequence.
- **Relationship:** To illustrate relationships between things, such as objects and people.
- **Matrix:** For grid-like diagrams.
- **Pyramid:** For a hierarchy of items, like the traditional food pyramid.
- **Picture:** To create picture galleries and collages, for example.
- **Office.com:** Connect to **office.com** to view the layouts available to download.

INSERTING A SMARTART GRAPHIC

To create diagrams using **SmartArt** graphics, you first need to open the SmartArt gallery. You then select a **layout** from one of the eight **categories** that will best depict the information

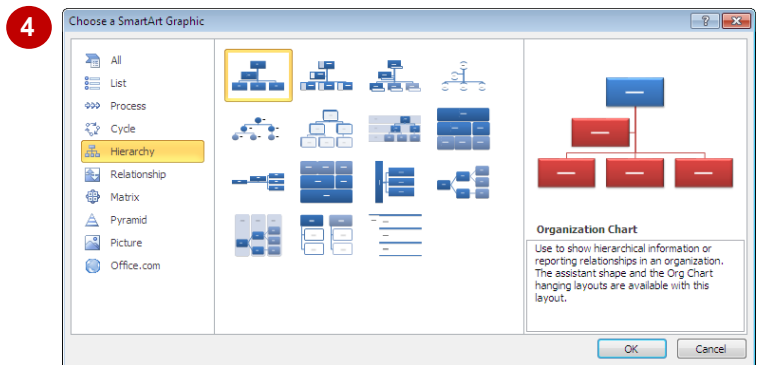
you want convey. Once you insert the graphic, you can then insert text and format the shapes as required. Here you will insert an **organisation chart**.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *W843 SmartArt_1.docx...*

- 1 Press **Ctrl** + **End** to move to the end of the document, just below the headings
You will insert the SmartArt graphic here...
- 2 Click on the **Insert** tab, then click on **SmartArt** in the **Illustrations** group to open the **Choose a SmartArt Graphic** dialog box
- 3 Click on each **category** in the left pane, and then click on various **layouts** in the centre pane to preview each layout
- 4 Click on **Hierarchy** in the left pane, then click on **Organisation Chart** in the centre pane to select this layout
- 5 Click on **[OK]** to insert the **SmartArt** graphic
The graphic is contained within a placeholder, and a [Text] placeholder is selected, ready for you to start typing...
- 6 Click outside the placeholder to deselect the graphic, then save the document



For Your Reference...

To **insert** a **SmartArt** graphic:

1. Click on the **Insert** tab, then click on **SmartArt** in the **Illustrations** group
2. Click on a **category** in the left pane
3. Click on a **layout**, then click on **[OK]**

Handy to Know...

- Among the numerous organisation chart layouts available in the **SmartArt** gallery is a **Picture and Name Organisation Chart**. If you insert this graphic, you will see picture placeholders. Click on a picture placeholder to open the **Insert Picture** dialog box, select the picture, then click on **[Insert]**.

INSERTING TEXT


Text is inserted into **text placeholders**, which contain the text within the corresponding shape. There are two ways to insert text into a **SmartArt** graphic: click on the **[Text]** placeholder and start

typing, or display and type your text into the **Text** pane. Inserting text into the Text pane is generally the quicker method, as you don't need to move to each shape before you type your text.

Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *W843 SmartArt_2.docx...*

- 1 Click on the **SmartArt** graphic to display the placeholder if it is not already displayed, then click on the tab  on the left edge of the placeholder to open the **Text** pane

The tab will expand to open the **Text** pane, where each bullet point corresponds to a shape in the graphic...


- 2 Click on the first bullet point and type **Managing Director**

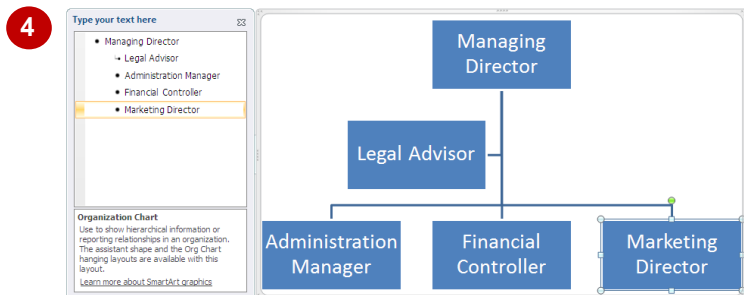
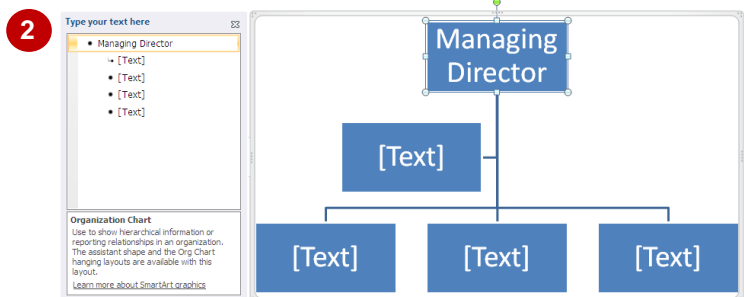
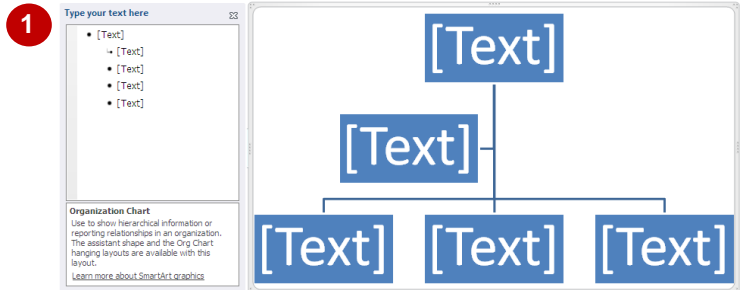
The text will also appear in the corresponding first shape in the chart. Notice also how the text size adjusts automatically...

- 3 Press  to move down to the next bullet point (assistant) and type **Legal Advisor**

- 4 Repeat step 3 to add the following entries:


Administration Manager
Financial Controller
Marketing Director

- 5 Click on **close**  at the top of the **Text** pane to close the **Text** pane, and then save the document




For Your Reference...

To **insert text** into a **SmartArt graphic**:

1. Click on the **SmartArt** graphic to display the placeholder, then click on the tab  on the left edge of the placeholder
2. Type the text, using the arrow keys to move between entries (shapes)

Handy to Know...

- To display and hide the **Text** pane, click on the **SmartArt** graphic to display the placeholder, then click on the **Design** tab. Click on **Text Pane**  in the **Create Graphic** group.

ADDING SHAPES BELOW

Although the range of **SmartArt** layouts make for a great start when creating diagrams, it's likely that you'll need to customise the graphic to meet your needs. One way to customise SmartArt is to

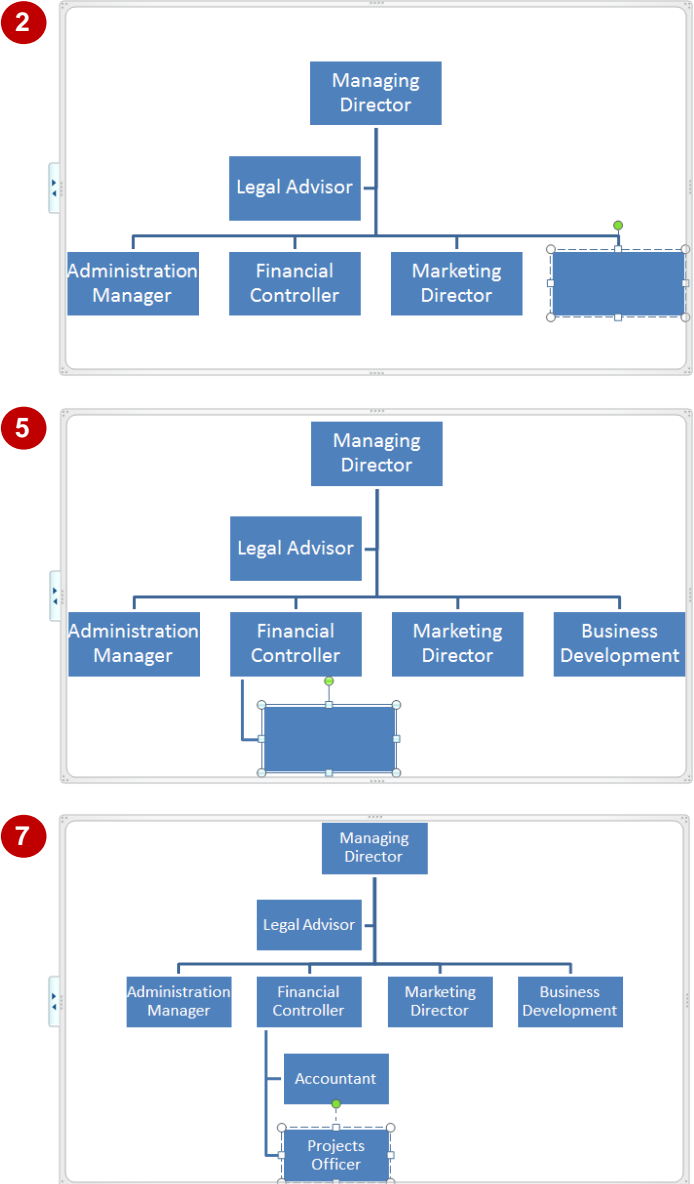
add shapes to the existing graphic. You can add shapes **below** the active (source) shape, which appear below the active shape as being one level down in the hierarchy.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W843 SmartArt_3.docx*...

- 1 Click on the text **Managing Director** to make the shape active
A dashed blue line will appear around the shape. You will add a shape one level below the active shape...
- 2 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape Below**
The shape will be inserted at the end of the level below. The new shape will be active and you can start typing...
- 3 Type **Business Development**
- 4 Click on the text **Financial Controller** to make the shape active
- 5 Click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape Below**
- 6 Type **Accountant**
- 7 Repeat steps 4 and 5 to add a shape with the text **Projects Officer**
- 8 Save the document



For Your Reference...

To **add a shape below**:

1. Click on the source shape to make it active
2. Click on the drop arrow for **Add Shape** in the **Create Graphic** group
3. Select **Add Shape Below**

Handy to Know...

- You can **add shapes below** by inserting text into the **Text** pane. To do this, open the **Text** pane and then click at the end of the bullet point entry for the source shape. Press **Enter** to add a shape (bullet point) below it, then press **Tab** and type the text.

ADDING SHAPES ABOVE

When you add a shape **above**, the shape will appear as one level above the active shape in the hierarchy. So, to add a higher position to an organisation chart, you will click on or select the

source shape (that is, the starting shape that you will add other shapes to) and then add a shape above it. Here you will add the **CEO** and **General Manager** to the hierarchy.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W843 SmartArt_4.docx...

1 Click on the text **Managing Director** to make the shape active

You will add the **CEO** to the hierarchy...

2 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape Above**

3 Type **Chief Executive Officer**

4 Click on the text **Administration Manager** to make the shape active

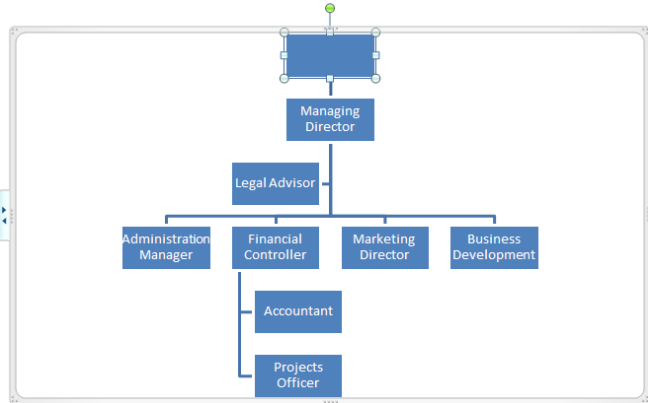
You will add the **General Manager** to the hierarchy...

5 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape Above**

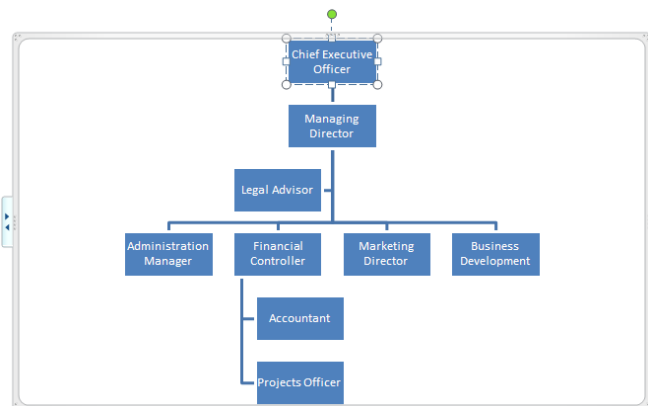
6 Type **General Manager**

7 Save the document

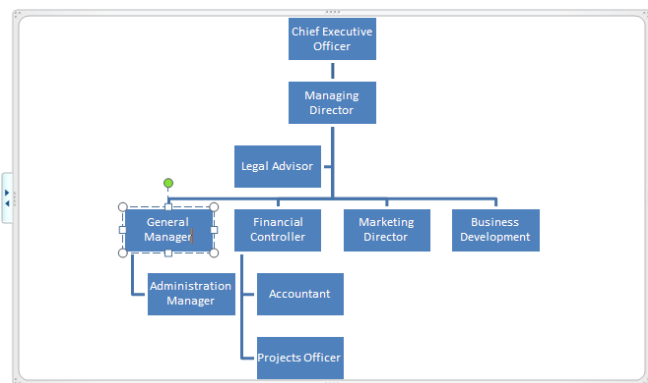
2



3



6



For Your Reference...

To **add a shape above**:

1. Click on the source shape to make it active
2. Click on the drop arrow for **Add Shape** in the **Create Graphic** group
3. Select **Add Shape Above**

Handy to Know...

- You can **add shapes above** by inserting text into the **Text** pane. To do this, open the **Text** pane, then click at the beginning of the bullet point entry for the required source shape. Press **Enter** to insert a new entry, then press **↑**, then press **Shift + Tab** to promote the entry (one level up), then type the text.

ADDING SHAPES BEFORE AND AFTER

As well as adding shapes to your **SmartArt** graphic that appear above and below the active shape in the hierarchy, you can also add shapes to appear either to the **right** or the **left** of the

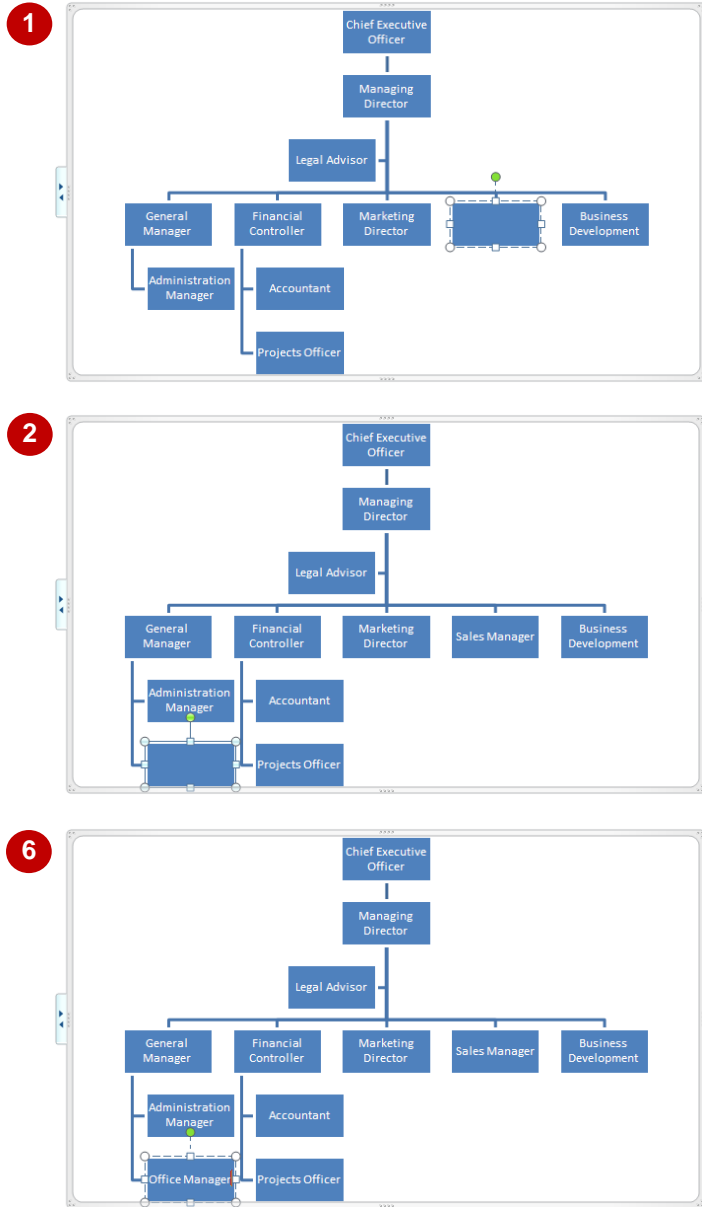
active shape, that is, **before** or **after** the active shape. When you add shapes before or after the active shape, the entry will appear **on the same level** of the hierarchy as the active shape.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W843 SmartArt_5.docx...*

- 1 Click on the text **Business Development** to make the shape active
You will add the Sales Manager to the hierarchy...
- 2 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape Before**
- 3 Type **Sales Manager**
- 4 Click on the text **Administration Manager** to make the shape active
You will add the Office Manager to the hierarchy, who also reports to the General Manager...
- 5 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape After**
- 6 Type **Office Manager**
- 7 Save the document



For Your Reference...

- To **add** a **shape before** or **after**:
1. Click on the source shape to make it active
 2. Click on the drop arrow for **Add Shape** in the **Create Graphic** group
 3. Select **Add Shape Before** or **Add Shape After**

Handy to Know...

- If you're not satisfied with the position of the shape when you **Add Shape Before** or **After**, you can click on **Move Up** to move the shape across one position to the left, or click on **Move Down** to move the shape across one position to the right.

ADDING AN ASSISTANT

An **assistant**, such as an Executive Assistant, generally reports to the CEO or Managing Director, but is not at the same level as other subordinates. For example, the CEO may have

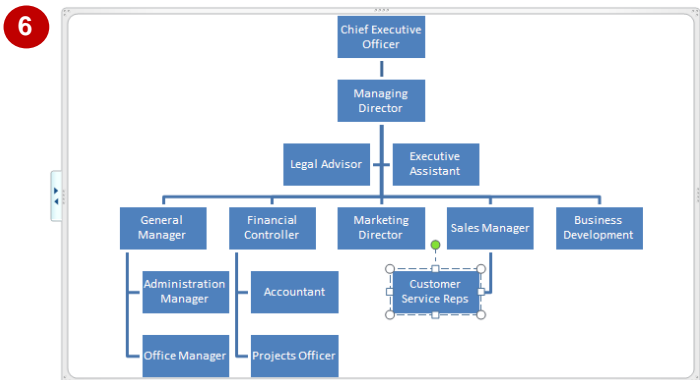
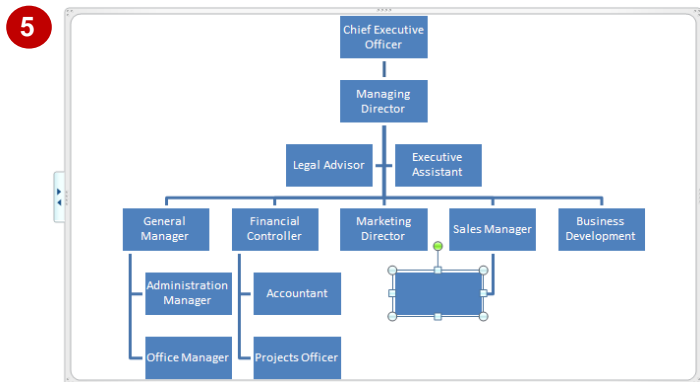
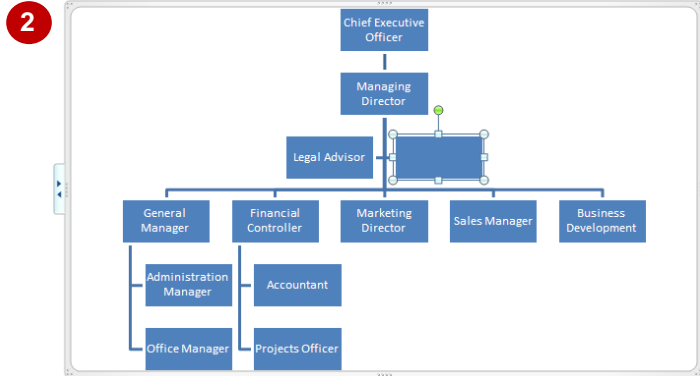
an Executive Assistant as well as other managers who report to them. For this reason, Word provides the **Add Assistant** tool to help account for these types of positions in the hierarchy.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W843 SmartArt_6.docx...*

- 1 Click on the text **Managing Director** to make the shape active
You will add Executive Assistant to the Managing Director...
- 2 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Assistant**
- 3 Type **Executive Assistant**
- 4 Click on the text **Sales Manager** to make the shape active
You will add Customer Service Reps...
- 5 Click on the **Design** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Assistant**
- 6 Type **Customer Service Reps**
- 7 Save the document



For Your Reference...

To **add** an **assistant**:

1. Click on the source shape to make it active
2. Click on the drop arrow for **Add Shape** in the **Create Graphic** group
3. Select **Add Assistant**

Handy to Know...

- By default, **assistants** are placed one level below the active shape and appear on the **left** of the connecting line. Subordinate positions appear on the **right** of the connecting line.

PROMOTING AND DEMOTING POSITIONS





Microsoft Word allows you to **promote** and **demote** positions in the hierarchy. This can save you from having to delete and recreate positions. When you promote or demote a position in the

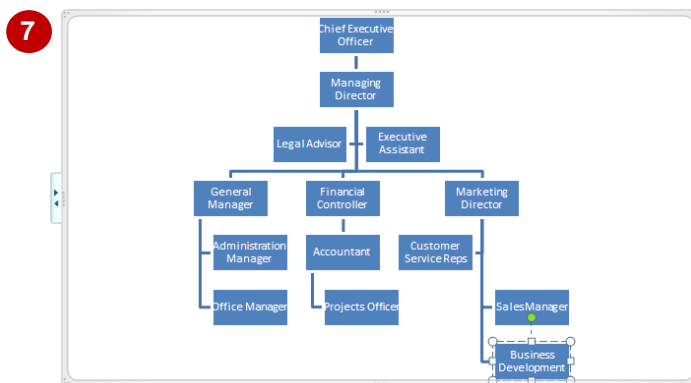
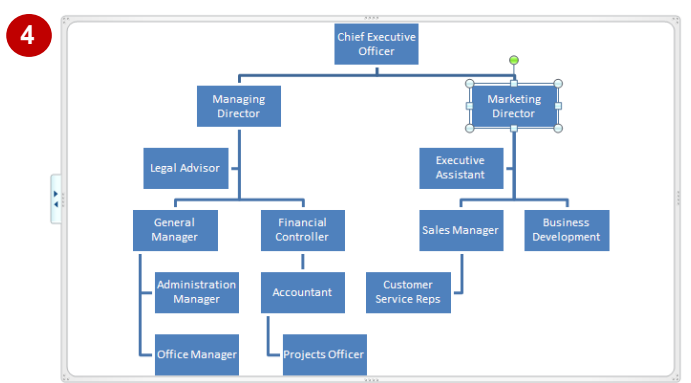
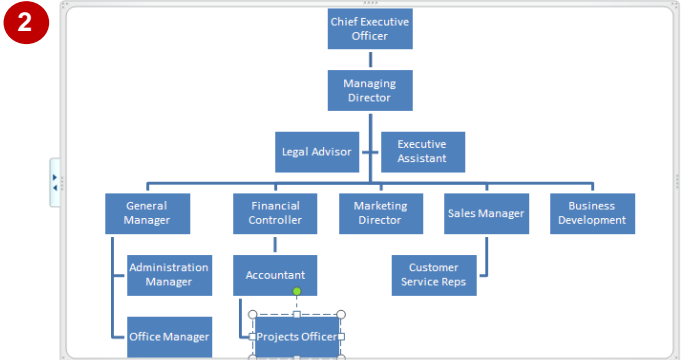
hierarchy, any positions subordinate to it are also promoted or demoted and move up or down one level accordingly in the hierarchy.

Try This Yourself:

Open File



Before starting this exercise you **MUST** open the file *W843 SmartArt_7.docx...*

- 1 Click on the text **Projects Officer**
The Projects Officer actually reports to the Accountant...
- 2 Click on the **Design** tab, then click on **Demote**  in the **Create Graphic** group
The connecting line changes to show the new reporting structure...
- 3 Click on the text **Marketing Director**
The chart should show that Business Development and the Sales Manager report to the Marketing Director...
- 4 Click on **Promote**  in the **Create Graphic** group
This is not right at all! The reporting structure is all over the place...
- 5 Click on **Demote**  or press **Ctrl + Z** to undo the change
We will try another approach...
- 6 Click on the text **Sales Manager**, then click on **Demote**  in the **Create Graphic** group
The position now reports to the Marketing Director...
- 7 Repeat the above step to demote **Business Development**, then save the document



For Your Reference...

To **promote** or **demote** positions:

1. Click on the source shape to make it active, and then:
 - Click on **Promote** 
 - or
 - Click on **Demote** 

Handy to Know...

- You may not get what you expect when promoting and demoting positions in a hierarchy, as this exercise has shown. Sometimes it may just be easier to delete the existing position and then recreate it in the correct position.

SWITCHING SMARTART RIGHT TO LEFT

The **Right to Left** tool allows you to switch the order of shapes in your **SmartArt** graphic. This is really the same as flipping or reversing the graphic. This also applies to any arrows that may


appear in the graphic. So, whatever appeared on the left now appears on the right and so on. Note that you can only flip or reverse the entire graphic, not parts of the graphic.

Try This Yourself:


Open File

Before starting this exercise you **MUST** open the file *W843 SmartArt_8.docx...*


1 Click anywhere on the graphic so that the graphic placeholder appears if it is not already displayed

2 Click on the **Design** tab, then click on **Right to Left**  in the **Create Graphic** group

The chart will be reversed. This layout is looking much better, let's just double-check that we want to use this layout..

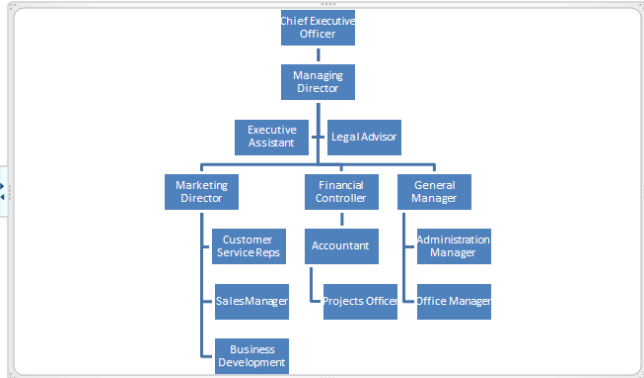
3 Click on **Right to Left**  again to restore the original layout

The other layout is preferable...

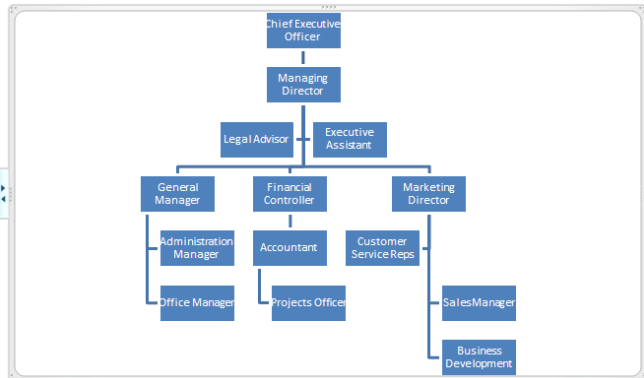
4 Click on **Right to Left**  again to reinstate the change

5 Save the document

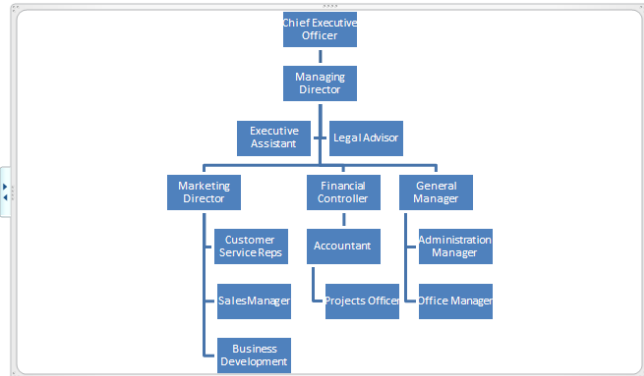
2



3




4




For Your Reference...

To **switch right to left**:

1. Click on the **SmartArt** graphic to display the graphic placeholder
2. Click on **Right to Left**  in the **Create Graphic** group

Handy to Know...

- **Right to Left**  is ideally suited for **cycle** and **process** diagrams, where it can be used to reverse the order of the process.



POSITIONING SMARTART

When you insert a **SmartArt** graphic, it will be inserted wherever the cursor is located on the page. However, this may not be its final destination! It's fair to say that you'll want to

reposition the graphic to sit exactly where you want it. For example, you may want to centre the graphic on the page. You can use the range of **Position** commands to position your SmartArt precisely.

Try This Yourself:

Open File Before starting this exercise you **MUST** open the file *W843 SmartArt_9.docx...*

- 1 Click on the **View** tab, then click on **One Page**  so that you can see the whole page on-screen
- 2 Click on the **SmartArt** graphic to display the graphic placeholder and make it active, and make sure no shapes are selected
- 3 Click on the **Format** tab and click on **Position**  in the **Arrange** group to see a gallery of position options
- 4 Point to each of the options under **With Text Wrapping** and watch as Word moves the SmartArt around the page in **Live Preview**
- 5 Click on **Position in Middle Centre with Square Text Wrapping** to position the drawing at the middle of the page
- 6 Deselect the graphic and save the document

AGE Research Institute

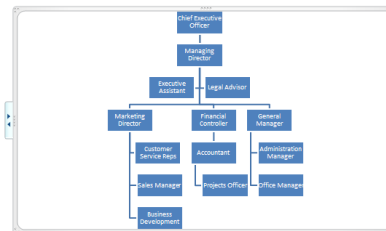
Organisational Chart



1

AGE Research Institute


Organisational Chart



5

For Your Reference...

To **position SmartArt**:

1. Click on the SmartArt graphic to activate it
2. Click on the **Format** tab, then click on **Position**  in the **Arrange** group
3. Select a position

Handy to Know...

- Click and drag on the placeholder to move the **SmartArt** to its new position. When you use the mouse to position SmartArt, it will override any **Position** settings that have been applied.

RESIZING SMARTART

By default, **SmartArt** will automatically resize to fit the placeholder and vice versa. So, as you add or delete shapes, for example, the graphic will adjust its size accordingly to fit the placeholder.

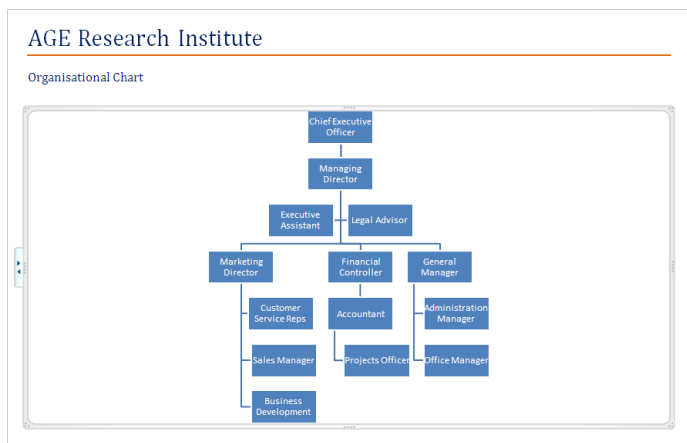
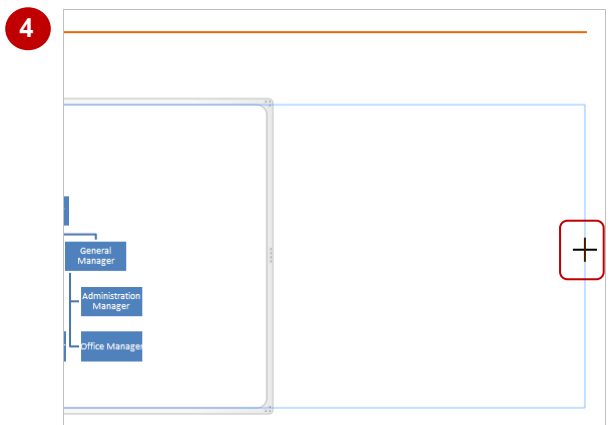
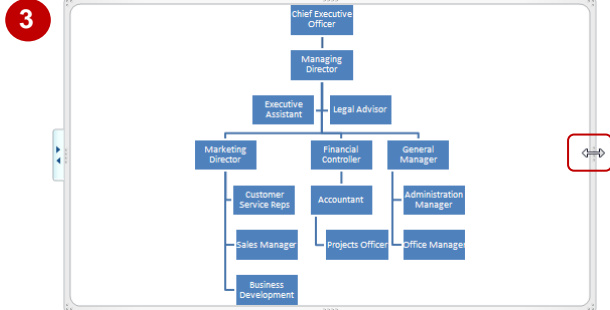
However, you may want to increase or decrease the size of the graphic, and there are a couple of ways to do this: either drag on a placeholder **handle**, or specify the **width** and **height**.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W843 SmartArt_10.docx...*

- 1 Click on the **SmartArt** graphic to make it active
You will first turn off any Position settings, as they override manual resizing and make resizing difficult...
- 2 Click on the **Format** tab, then click on **Position** and select **In Line With Text**
The graphic is no longer centred, but we can fix that...
- 3 Move the pointer over the placeholder handle that appears at the right edge of the placeholder so that a double-headed arrow appears, as shown
- 4 Click and drag to the right, as shown
- 5 Release the mouse button
The graphic is now centred, and the placeholder has resized but not the graphic. Adjusting the height will help...
- 6 Make sure the **SmartArt** graphic is active, click on the **Format** tab, then click in **Height** on the **Size** group and type **12**, then press to apply the new height



6

For Your Reference...

To **resize SmartArt**:

1. Click in the **SmartArt** graphic to activate it
2. Click and drag on a placeholder handle to resize, or click on the **Format** tab, then specify the required **Height** and **Width** in the **Size** group

Handy to Know...

- Press while dragging on a placeholder handle to resize from all four sides at once.
- As seen in this exercise, increasing the width of the placeholder does not necessarily increase the width of the graphic. SmartArt should be resized **proportionately** (both width and height) when dragging.

APPLYING A DIFFERENT LAYOUT

Each **SmartArt category** in the **SmartArt** gallery contains a range of **layouts** that you insert to create your diagrams. But if you're not happy with the layout, it doesn't mean you're stuck with it!

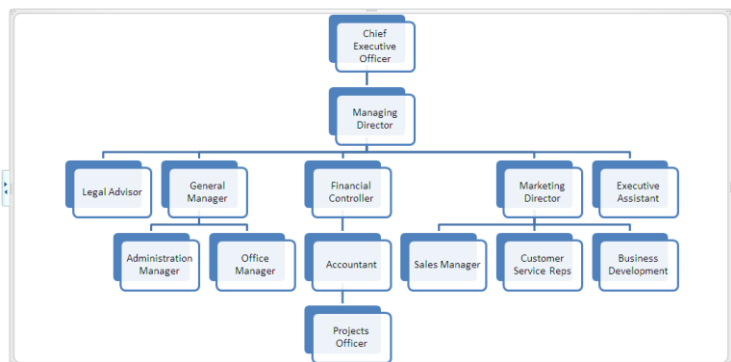
You can easily apply a different layout to your existing graphic. The shapes and text will reformat in line with the selected layout, and changing the layout will not affect the structure of the diagram.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W843 SmartArt_11.docx...

- 1 Click on the **SmartArt** graphic to display the graphic placeholder and make it active
- 2 Click on the **Design** tab, then click on **More** in the **Layouts** group to display the gallery of available layouts
The current layout is outlined in yellow...
- 3 Point to different layouts to see the organisation chart reformatted in **Live Preview**
The name of each layout will be displayed in a tool tip...
- 4 Click on **Hierarchy** to apply this layout
- 5 Save the document



For Your Reference...

To **apply a different layout**:

1. Click on the **SmartArt** graphic to activate it
2. Click on the **Design** tab, then click on **More** in the **Layouts** group
3. Click on a layout to apply

Handy to Know...

- To view the full range of **SmartArt layouts** when choosing a different layout, click on the graphic to activate it, then click on the **Design** tab, click on **More** in the **Layouts** group and select **More Layouts**. The **SmartArt** gallery will be displayed. Select an alternative layout, then click on **[OK]**.

APPLYING A COLOUR SCHEME

Well it seems that you can change pretty much every other aspect of **SmartArt** graphics, so of course there will be options for changing the default colour scheme. There are many other

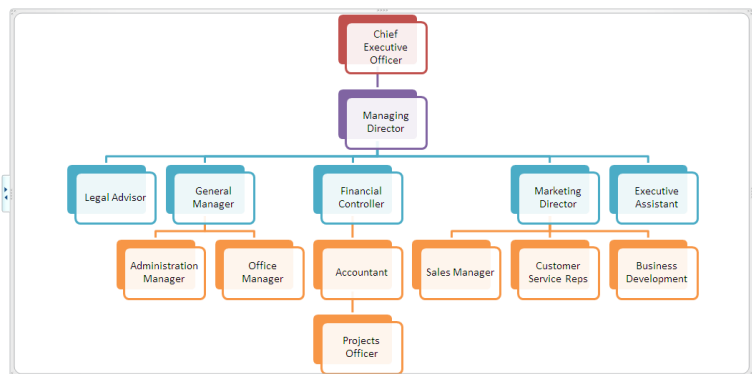
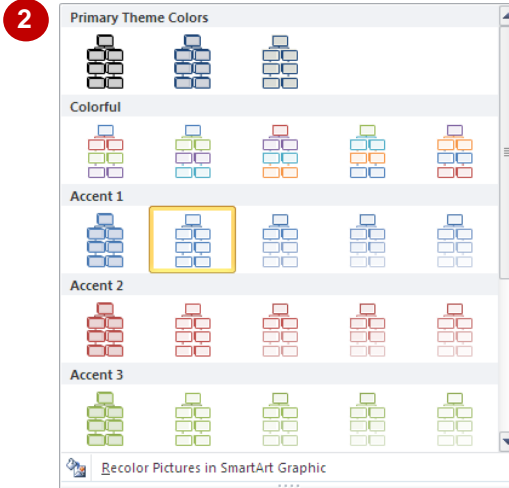
colour schemes that you can apply to your SmartArt to ensure, for example, that the graphic conforms to the formatting requirements of the document.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *W843 SmartArt_12.docx...*

- 1 Click on the **SmartArt** graphic to display the graphic placeholder and make it active
- 2 Click on the **Design** tab, then click on **Change Colours**  in the **SmartArt Styles** group to display a gallery of colour schemes (or **themes**)
The current colour theme, Coloured Fill – Accent 1, is highlighted in yellow...
- 3 Point to different colour themes to see the SmartArt update in **Live Preview**
- 4 Click on **Colourful Range – Accent Colours 3 to 4** to apply the colour scheme
- 5 Save the document



For Your Reference...

To **apply a colour scheme**:

1. Click on the SmartArt graphic to activate it
2. Click on **Change Colours**  in the **SmartArt Styles** group
3. Click on a colour scheme to apply

Handy to Know...

- You can modify the format of individual shapes, lines and the text within the graphic. To do this, click on a shape or line to select it (press **Shift** and click to select multiple shapes), or select the text, then click on the **Format** tab and apply formatting as required.

APPLYING A SMARTART STYLE

And so the range of SmartArt formatting options continues! Not only can you change the layout and colour scheme of your SmartArt to whatever suits your fancy, you can also apply **styles** to

your SmartArt. **Styles** differ to layouts in that they include a range of effects for shapes, such as 3D effects, thereby enhancing the look of your graphic.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W843 SmartArt_13.docx...

1 Click on the **SmartArt** graphic to display the graphic placeholder and make it active

2 Click on the **Design** tab, then click on **More** in the **SmartArt Styles** group to display the gallery of styles

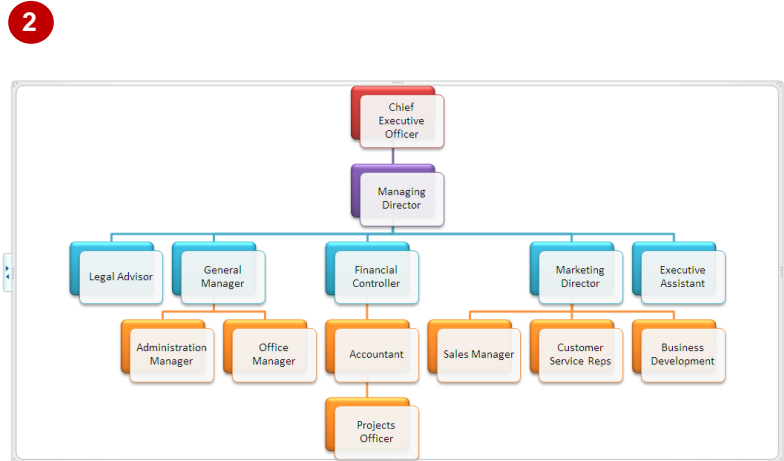
Word suggests a range of styles that best match the current document...

3 Point to different styles to see the **SmartArt Style** change in **Live Preview**

You may need to wait a moment for Live Preview to display the effect, as 3D effects can be quite memory-intensive...

4 Click on **Intense Effect** to apply this style

5 Save the document



For Your Reference...

To **apply** a **SmartArt Style**:

1. Click on the **SmartArt** graphic to activate it
2. Click on the **Design** tab, then click on **More** in the **SmartArt Styles** group
3. Click on the desired style to apply it

Handy to Know...

- You can **reset** a SmartArt graphic to its original form (that is, the original layout). This will remove any formatting, such as styles and colour schemes. To do this, activate the graphic, click on the **Design** tab and then click on **Reset Graphic**.

DELETING SMARTART SHAPES

As well as formatting your SmartArt graphic with the seemingly endless range of formatting options, you may also need to edit the graphic, such as deleting individual shapes or editing text.

When you delete shapes in a SmartArt graphic, the graphic will adjust accordingly. Any lines connecting to that shape will also be removed.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *W843 SmartArt_14.docx...*

1 Click on the border of the white (front) box for **Legal Advisor**

The handles should appear around the shape but the cursor should not appear in the text...

2 Press **Del**

The shape will be deleted and the graphic will adjust accordingly...

3 Click on the border of the white (front) box for **Office Manager**

4 Press **Del**

You will now edit some existing text...

5 Click on the text **Development** (for **Business Development**), then press **End** to move to the end of the text

6 Press **Space** then type **Manager**

7 Click outside the graphic to deselect it and view the result

8 Save and close the document

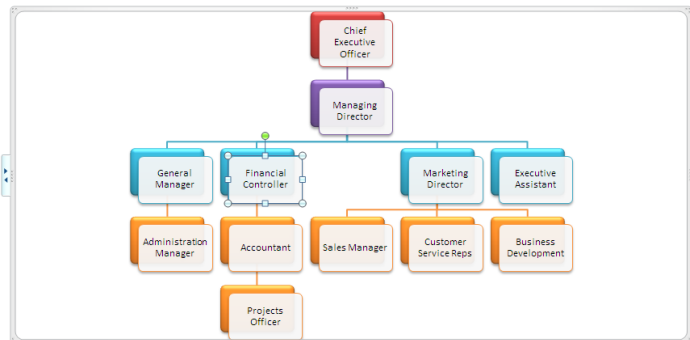
1



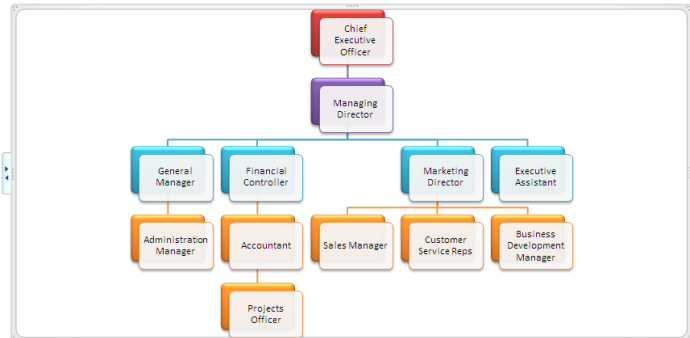
2



4



6



For Your Reference...

To **delete** a **shape** from **SmartArt**:

1. Click on the border of the shape to select it
2. Press **Del** or **Back Space**

Handy to Know...

- To delete multiple shapes at once, press **Shift** and click to select multiple shapes, then press **Del**.
- To delete the entire SmartArt graphic, activate the graphic, make sure no shapes are selected, then press **Del**.