

# Learn Today Know Tomorrow

## Creating a simple flowchart in Microsoft Excel 2007

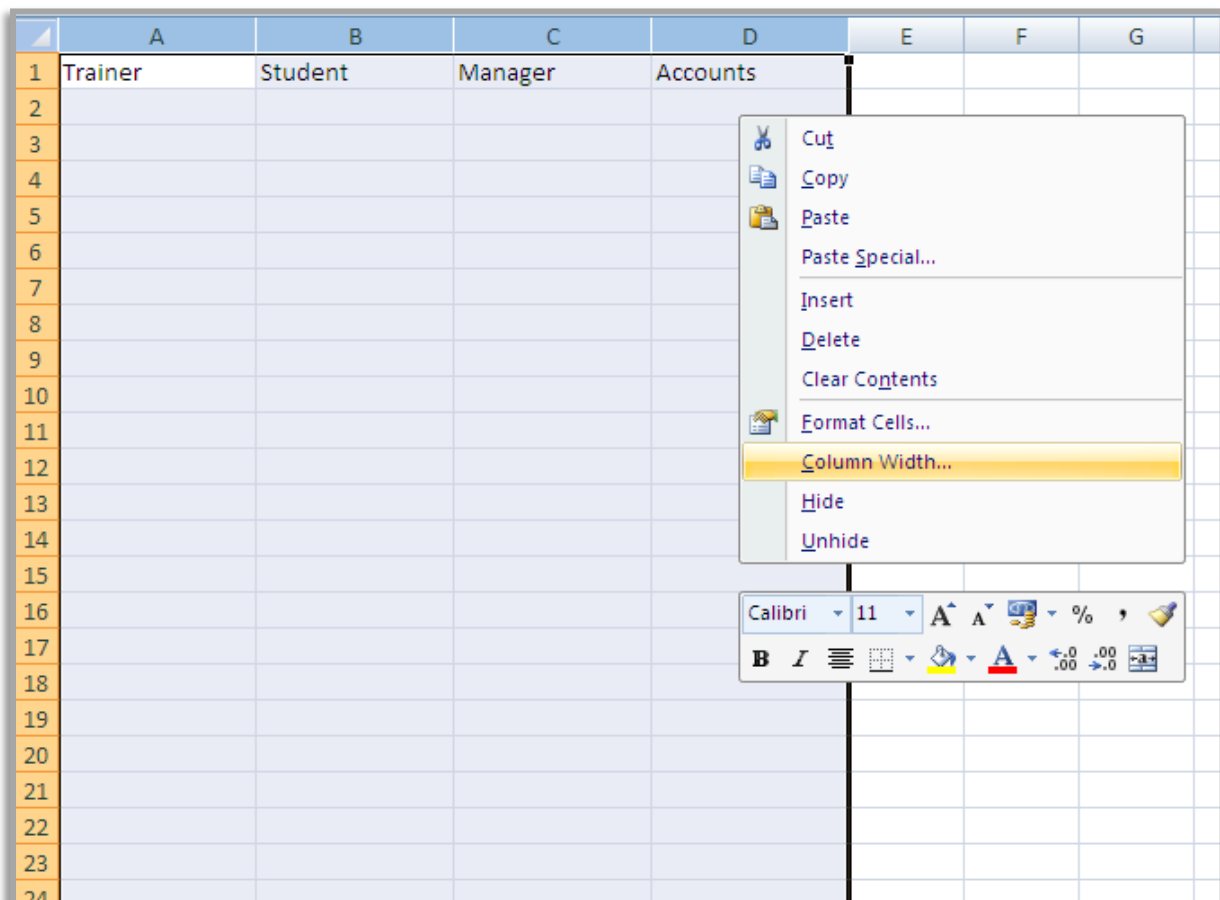
I will use the sample from earlier to illustrate using Excel:

1. Trainer logs into LMS
2. Searches for course name
3. Enters the system course record
4. Selects students who attended & marks "complete"
5. System sends completion emails/certificate notifications to students
6. Repeat for no-shows
7. System sends no-show notifications to students and copies their manager
8. Repeat for cancellations
9. System sends cancellation notifications to students, copies their manager and accounts department
10. Trainer logs out

**Step 1:** Start with a blank Excel workbook

**Step 2:** Create a column for each user group. These columns are referred to as "swimlanes"  
*In our example we have 4 relevant groups – the trainer, the student, the manager & accounts*

**Step 3:** Highlight the relevant columns > right click > select "column width".  
Depending on how many columns you have you will need to adjust the width. In the example shown I choose a width of 15.

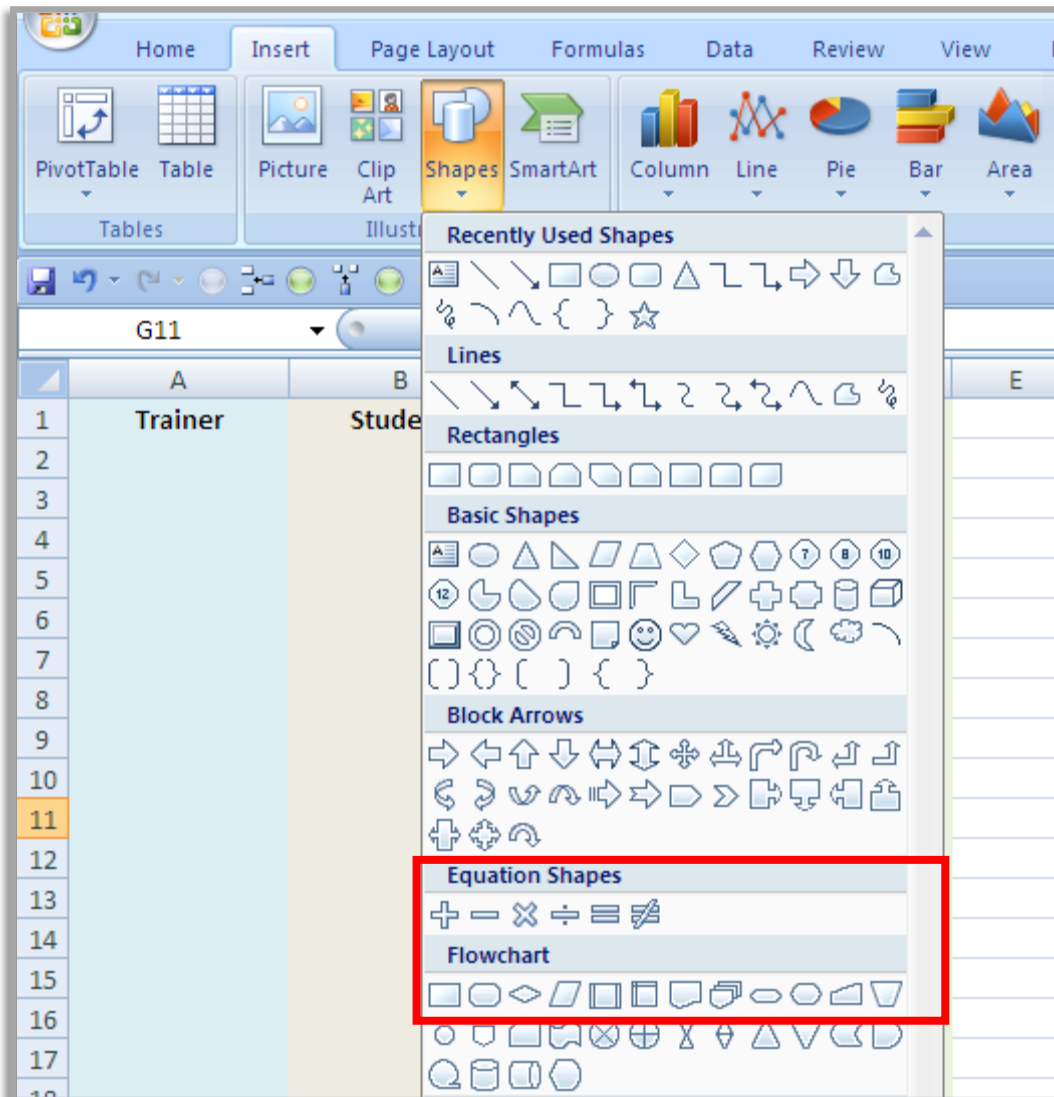


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**Step 4:** You may or may not choose to format your page.

	A	B	C	D	E	F
1	Trainer	Student	Manager	Accounts		
2						
3						
4						
5						
6						
7						
8						
9						

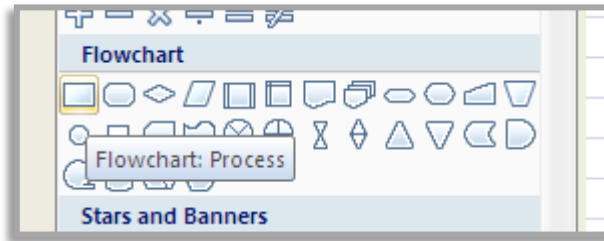
**Step 5:** Excel holds the pre-defined flowchart icons under Insert > Shapes > Flowcharts  
You can find out what each icon means by hovering the mouse over the icon



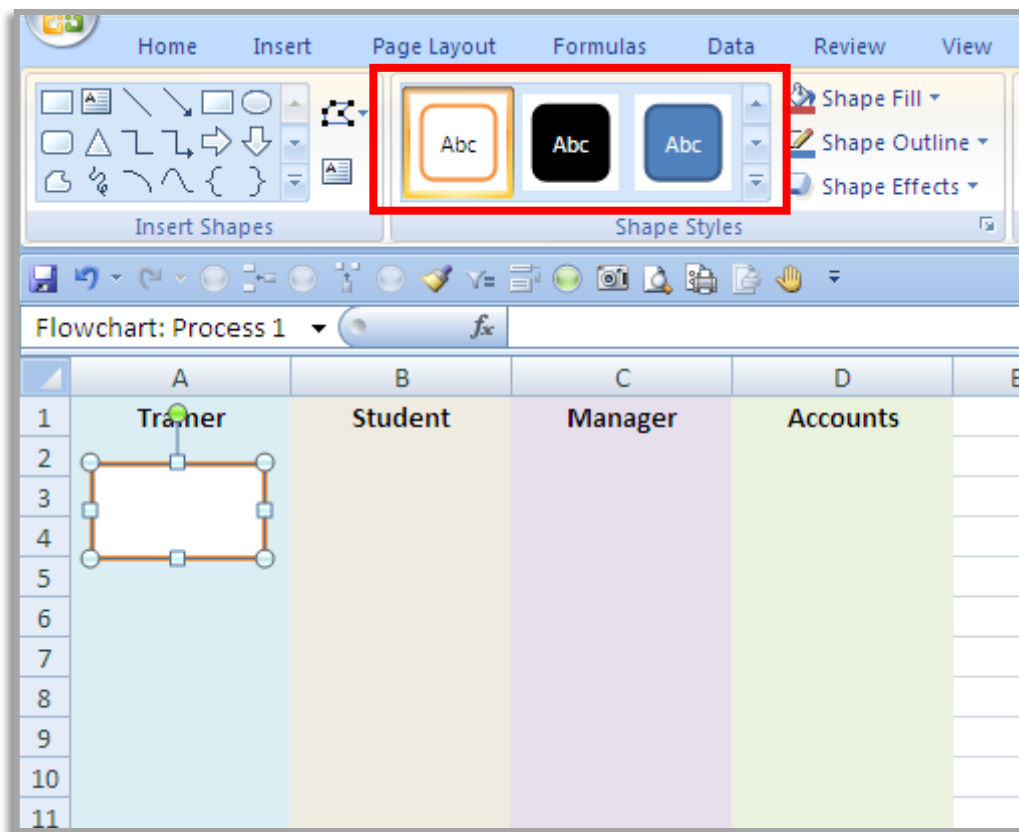
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To insert a shape, simply click on it and draw in the required column.

*In our example, the first action is "trainer logs into LMS". This is a process step, so I have chosen the process rectangle icon and drawn it in the trainer column*

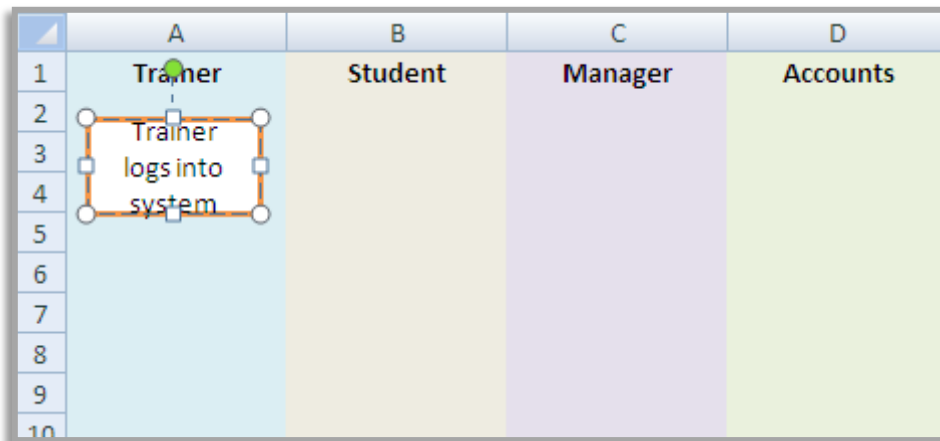


Excel 2007 pre-formats these shapes, so I chose to change it using the "shape styles" ribbon.

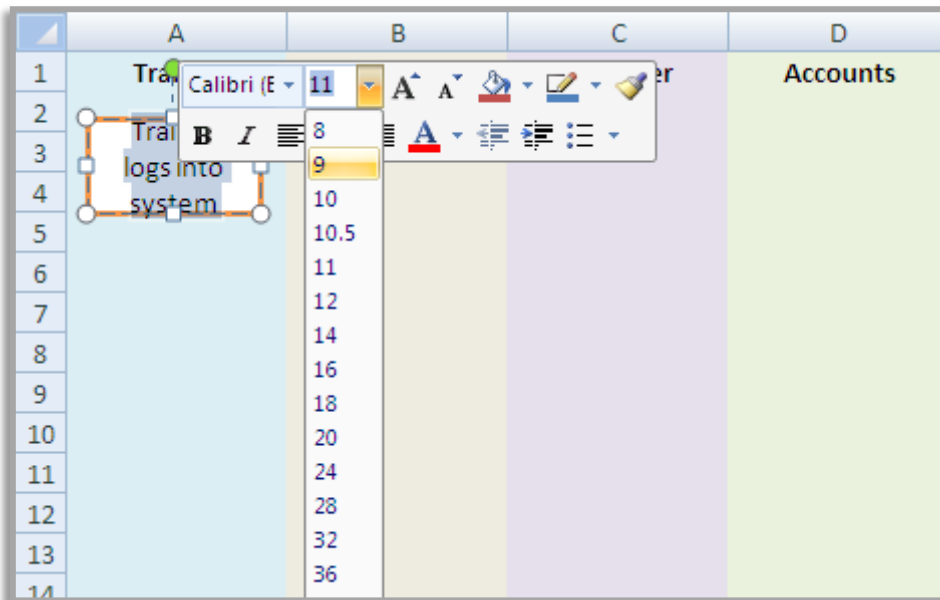


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**Step 6:** To enter text on the shape I just click into the shape and start typing.

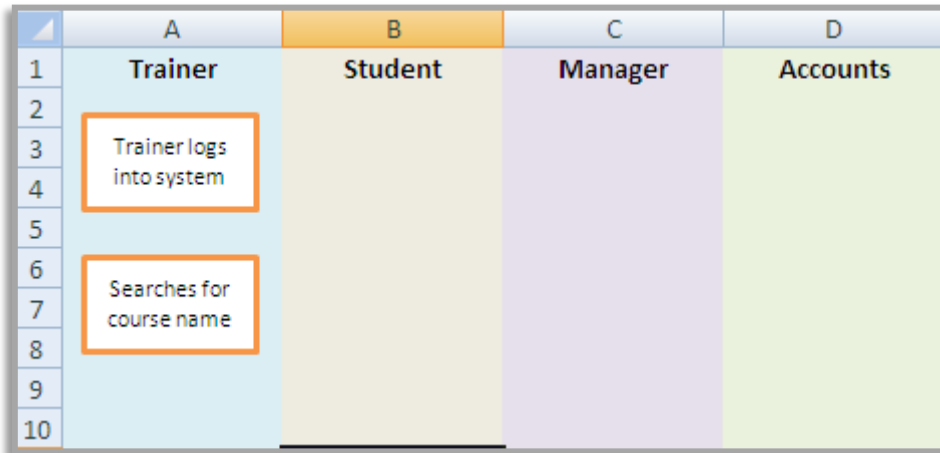


As you can see, the default text is a little large, so I adjust the text size by highlighting and right-clicking.

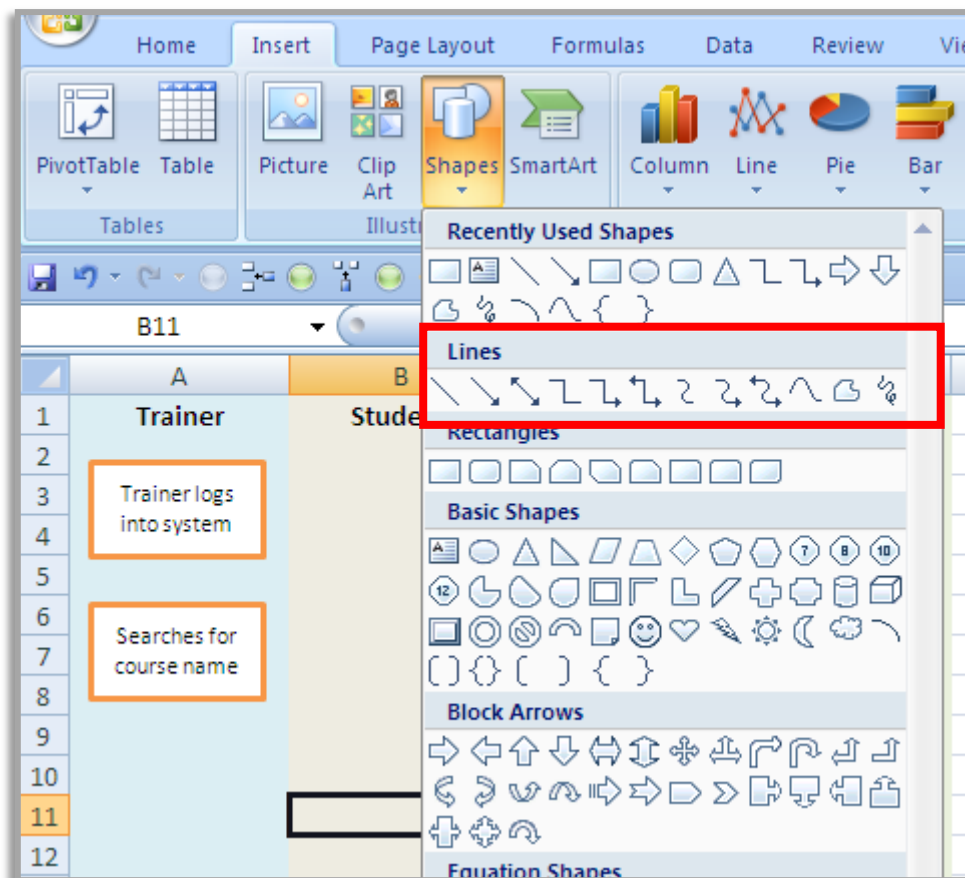


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**Step 7:** To duplicate an existing shape simply select it, hold CTRL and press D. You can also just copy and paste it. Replace the text by highlighting and typing.



**Step 8:** To indicate that one process leads to another you use a connector. These are also found in the Insert > Shapes menu under Lines

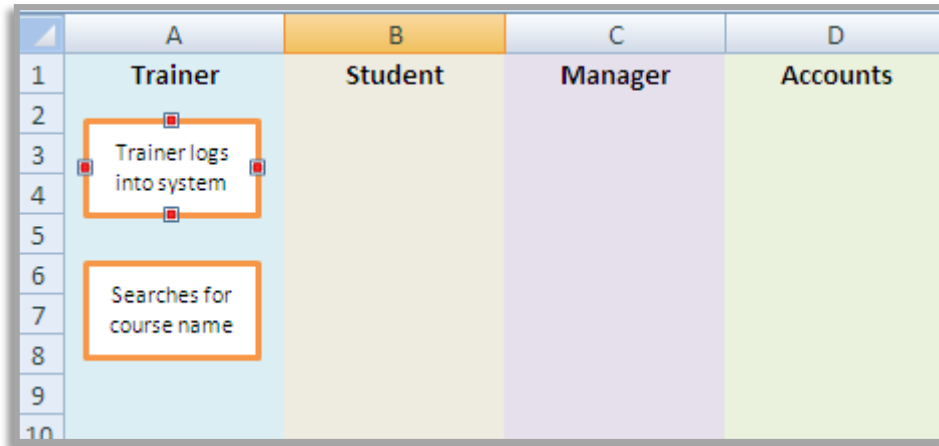


Simply select the line you require, in this case the second line suits as it has one arrow and is perfectly straight.

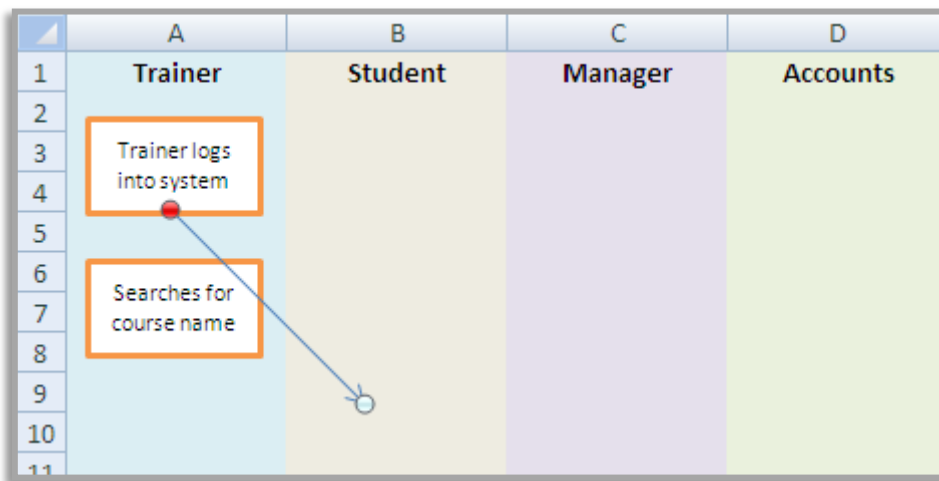
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Once you select the line type, as you hover the mouse over the first shape, red connector points appear. These indicate points that you can use to anchor your connector lines.

By anchoring a connector line to a red box on each shape, the line will move with the boxes if you chose to reposition them later in your editing.



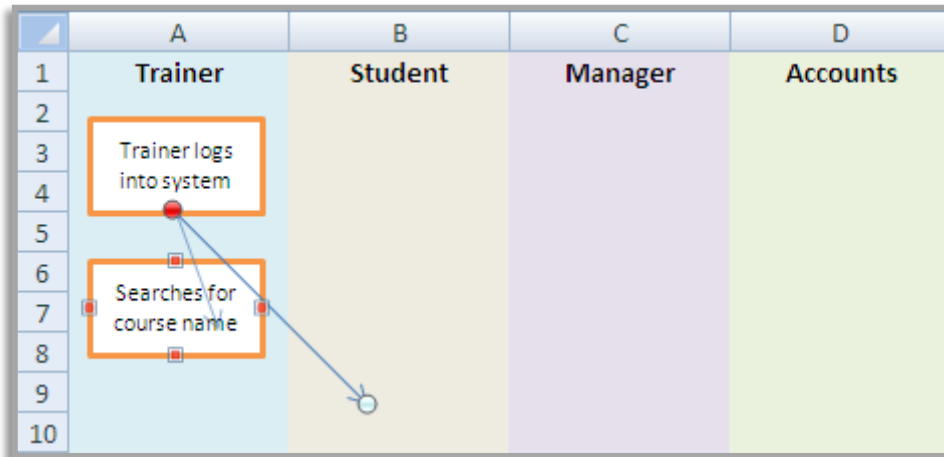
Once you select the point and click on it, excel automatically inserts the line and anchors it to that point. I selected the bottom anchor point



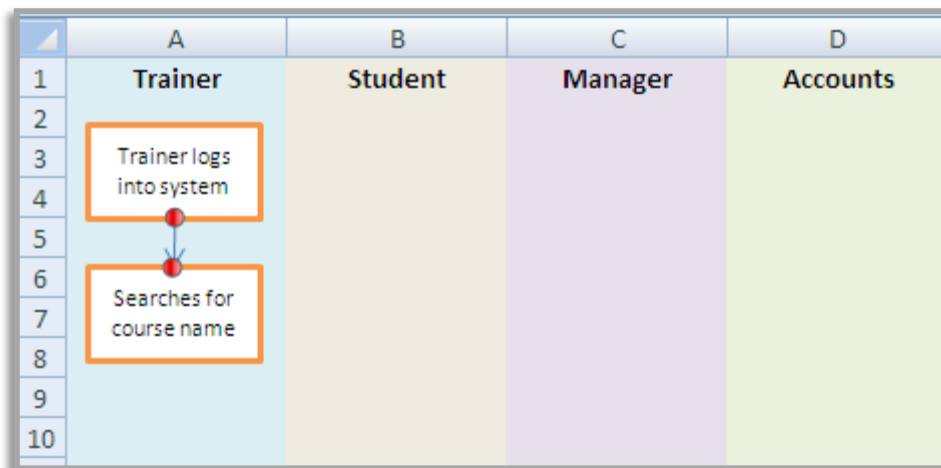
The red dot on the line indicates that this point is anchored. The blue dot indicates that this point is unanchored. The next step is to anchor the arrow end of the line to the second shape.

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Click and hold on the blue point and drag it over the second shape. The red anchor boxes will appear again.



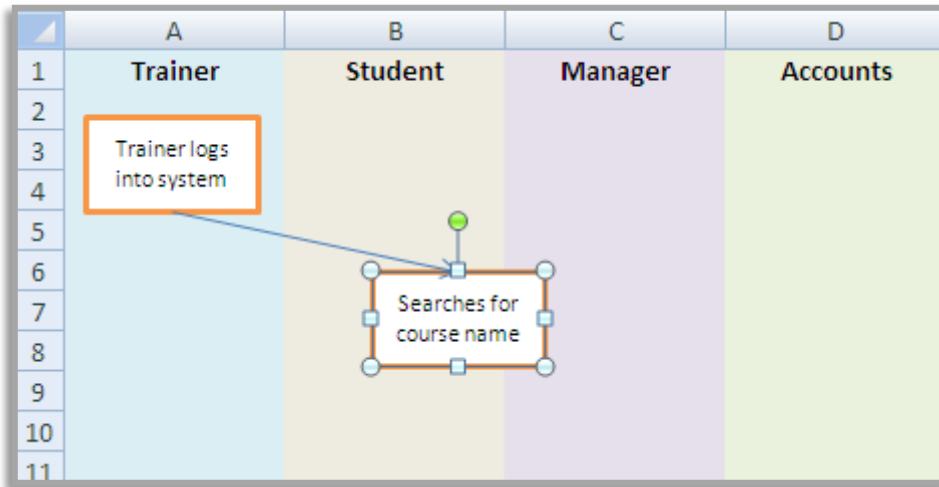
As you can see, the blue line remains in place and a second faint line indicates it's potential position. Once you select the red anchor box the line will snap into place.



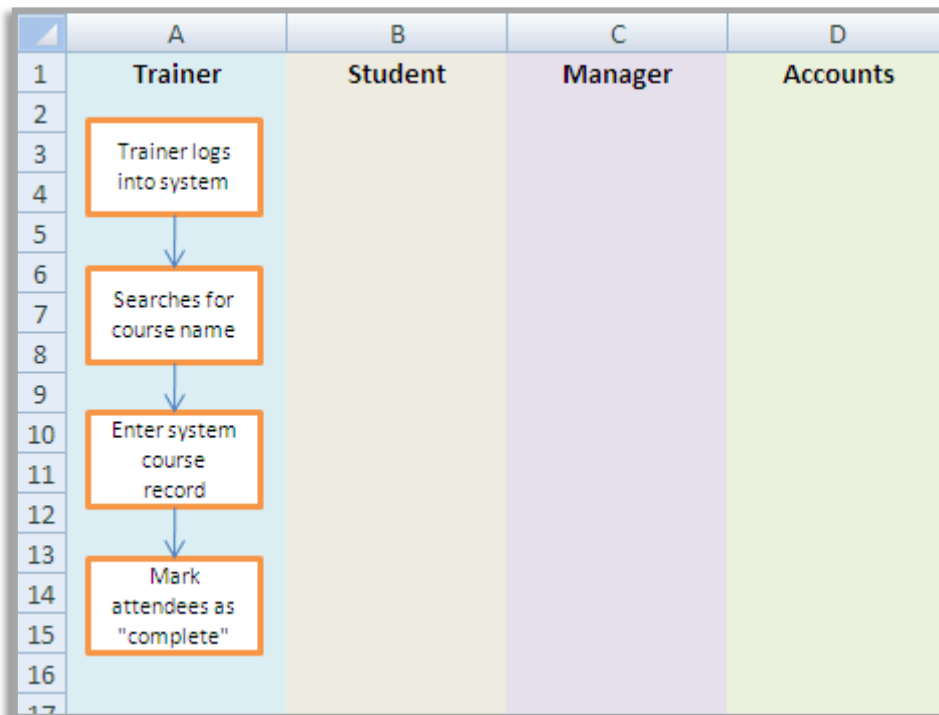
As you can see the line now has two red points, to indicate both ends are now anchored to shapes. If you are following the tutorial step for step, try moving your second box around.

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Your line should now stay attached to shape 1 while following shape 2.



I have repeated this procedure for the next two actions, which are the same.

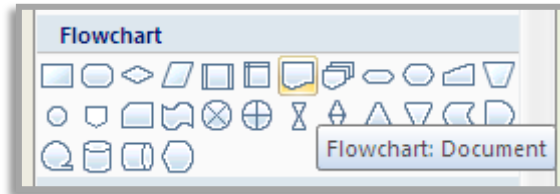




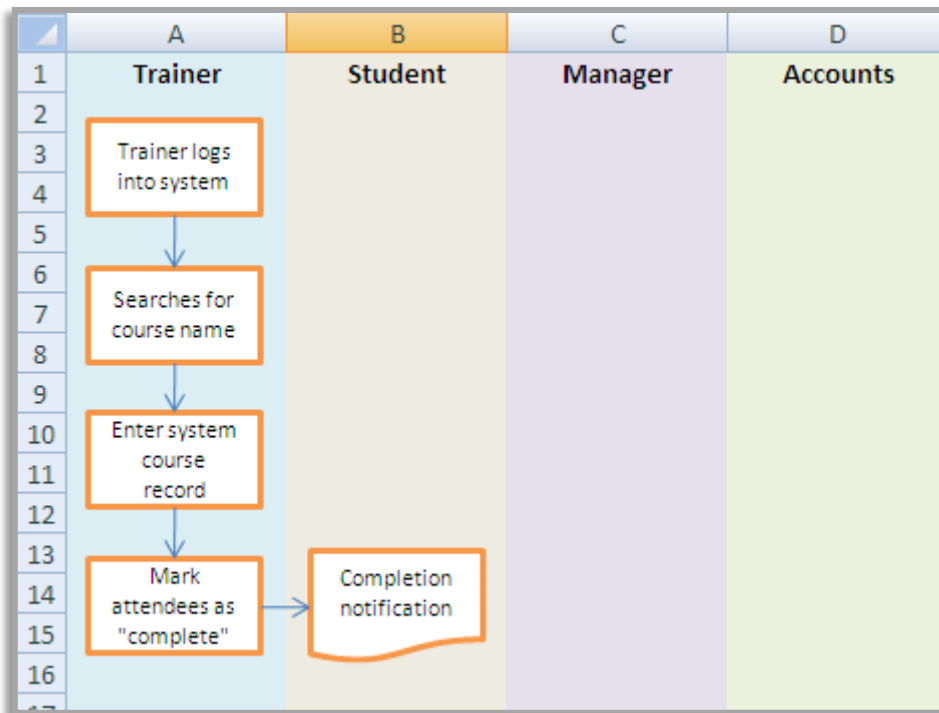
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**Step 9:** The next action is “system sends completion emails/certificate notifications to students”.

This can be shown using a different icon. I like to use the document icon. However, if you have a lot of document involved in your processes you may want to use a different icon. As long as you, your team and the vendor all understand it means “e-mail” you can pick the best option for you.

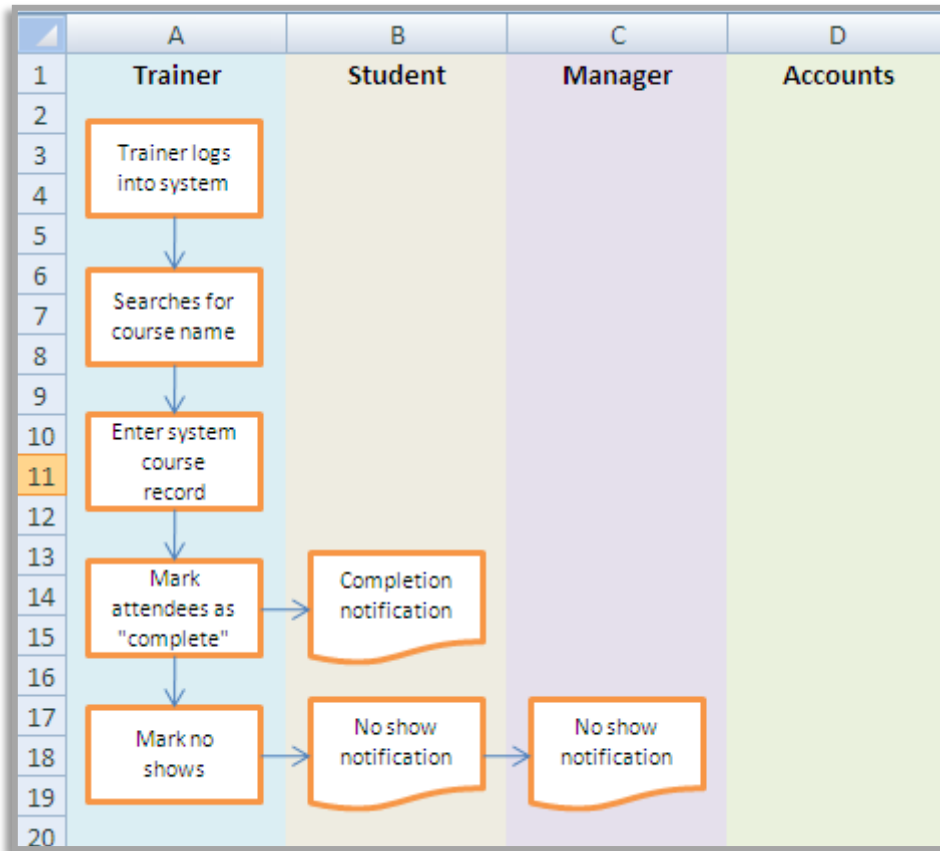


You can see that I have added the completion notification shape to the student, to indicate that the student is the recipient of the email.

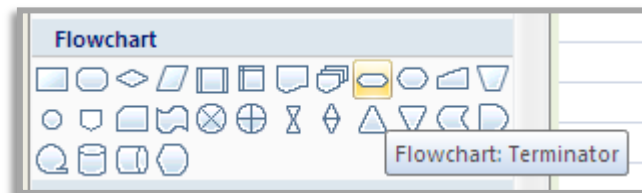


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I have repeated this for the next two steps

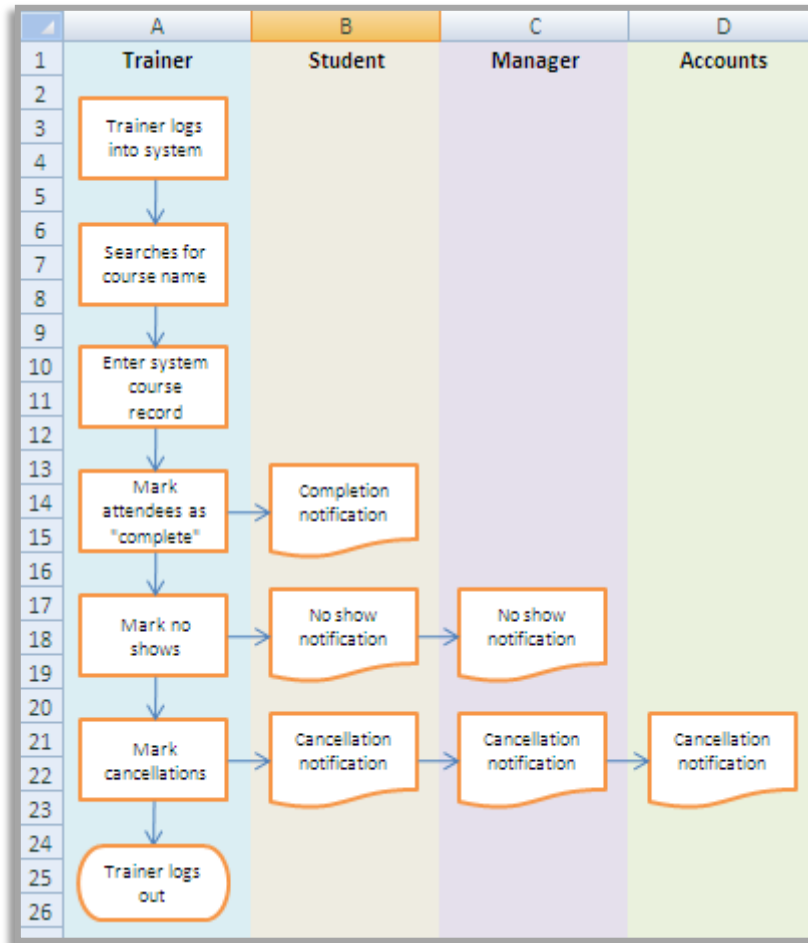


**Step 9:** Once you have completed all your steps, you need a terminator action, to indicate that the process is over. This action requires a special icon, the terminator.

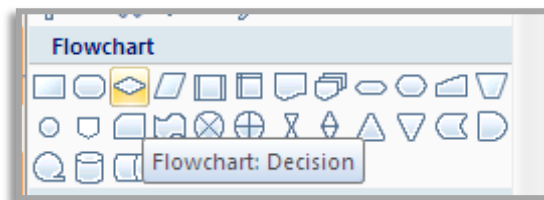


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I have finished the example process



**NB. One other icon you will probably need to use is the decision icon**



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In our example we could use the decision icon as follows

