

Microsoft PowerPoint 2010

- Level 1

6 – SmartArt



CORPORATE LEARNING & DEVELOPMENT

SMARTART

InFocus

Rather than constructing diagrams from scratch, PowerPoint includes a range of SmartArt graphics that you can use. SmartArt includes a range of graphics to help you to build simple or complex diagrams, such as flow charts, process charts, organisation charts, to name only a few! Select a SmartArt graphic from the gallery and then customise it to suit your needs. SmartArt will help you to create professional-looking diagrams in minutes.

In this booklet we will show you how to:

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

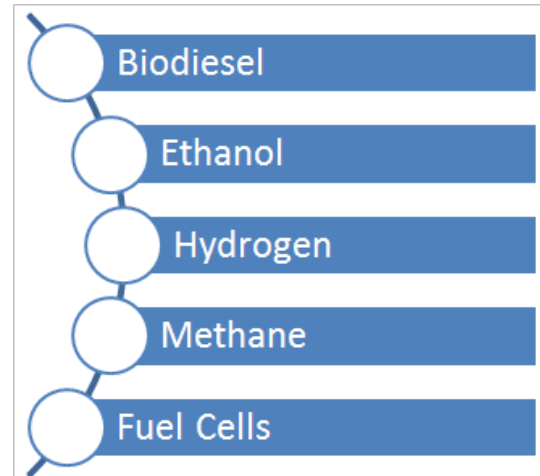
UNDERSTANDING SMARTART

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.

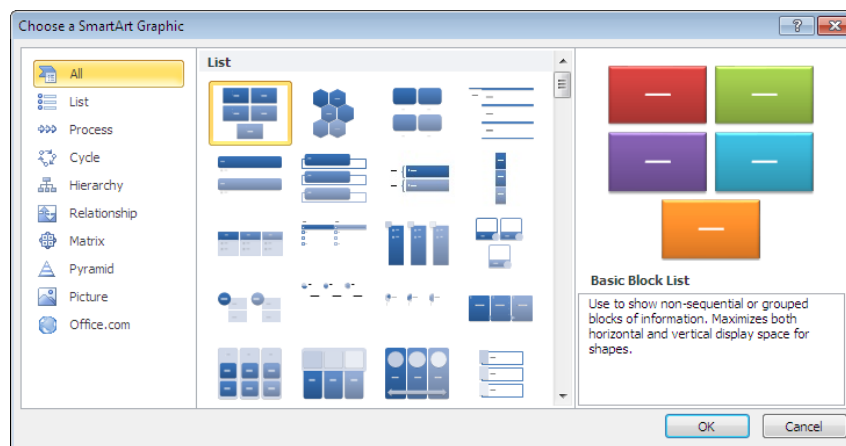
How To Use SmartArt

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 to

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 P810 SmartArt_01.pptx...

- 1 Click on **Insert SmartArt graphic** in the content placeholder, or click on the **Insert** tab, then click on **SmartArt** in the **Illustrations** group to open the **Choose a SmartArt Graphic** dialog box

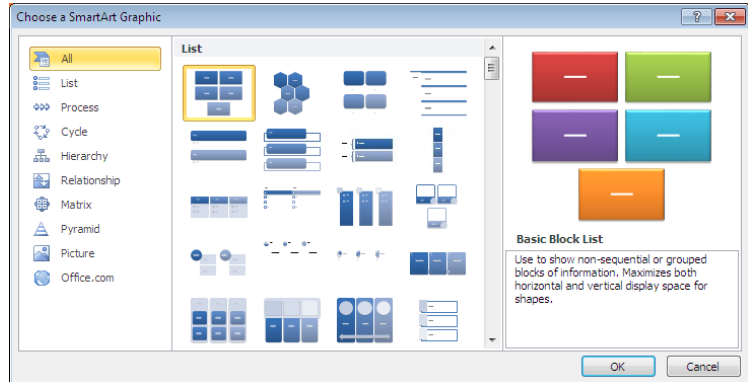
You will insert the graphic into the placeholder...

- 2 Click on each **category** in the left pane, and then click on various **layouts** in the centre pane to preview each layout

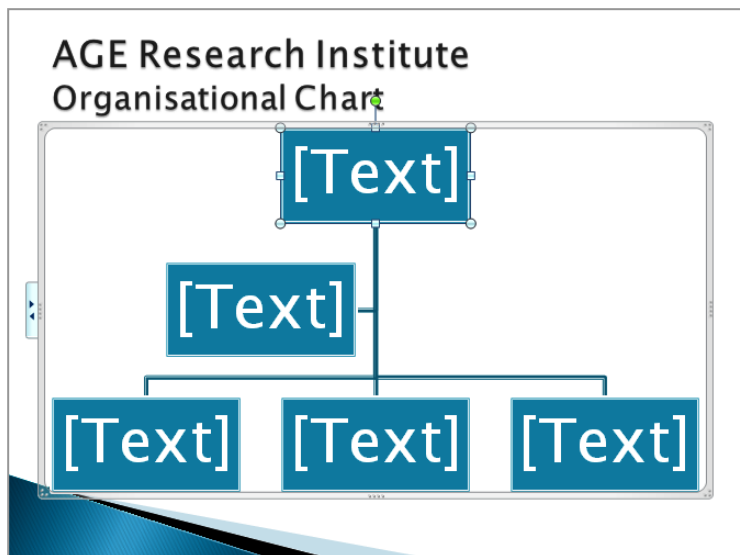
- 3 Click on **Hierarchy** in the left pane, then click on **Organisation Chart** in the centre pane to select this layout

- 4 Click on **[OK]** to insert the **SmartArt** graphic

The graphic is contained within a placeholder, and you can click in any [Text] placeholder and start typing



1



4

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 P810 SmartArt_02.pptx...

- 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...

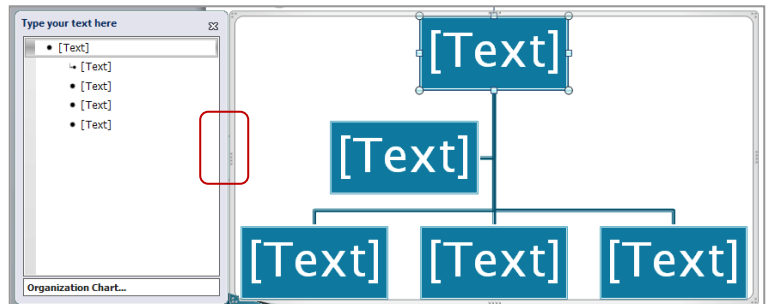
- 2 Click on the first bullet point and type **Managing Director**
The text will also appear in the corresponding shape in the chart. Notice also how the font size adjusts automatically...

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

- 4 Repeat step 3 to add the following entries:

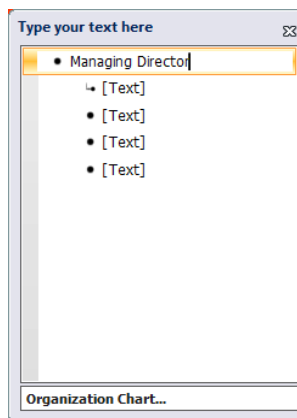
Administration Manager
Financial Controller
Marketing Director

- 5 Click on **close**  at the top of the **Text** pane to close the **Text** pane

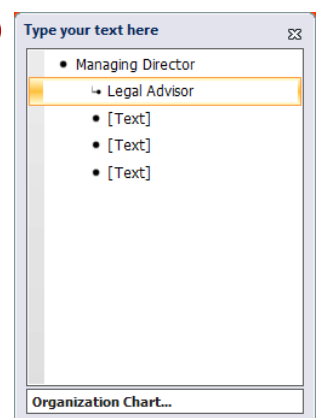


1

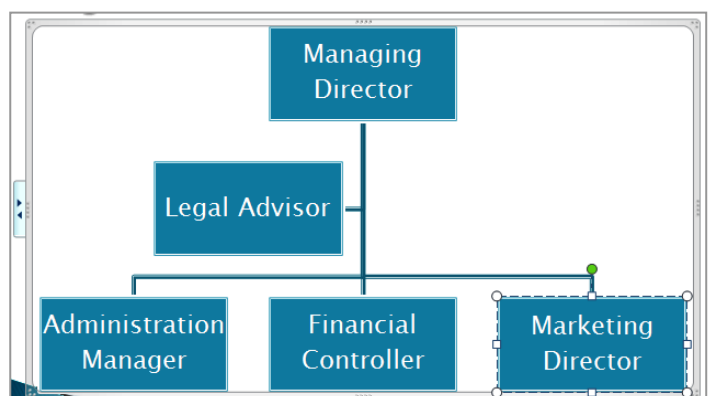
2



3




5




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...

- You can also display and hide the **Text** pane by clicking in the graphic to activate the placeholder, then clicking on **Text Pane**  in the **Create Graphic** group on the **Design** tab.

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 *P810 SmartArt_03.pptx...*

1

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

A dashed blue line will appear around the shape, indicating it is active, or editable. You will add a shape one level below the active shape...

2

Click on the **SmartArt Tools: 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 a level below and will be active so you can start typing...

3

Type **Business Development**
You will now add the Accountant and Projects Officer, who reports to the Financial Controller...

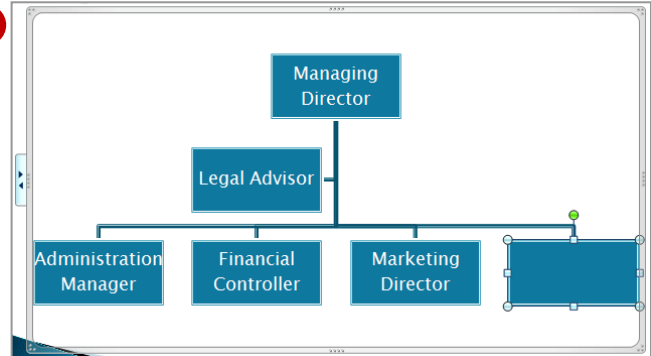
4

Click on the text **Financial Controller** to make the shape active, then click on the drop arrow for **Add Shape** in the **Create Graphic** group and select **Add Shape Below**

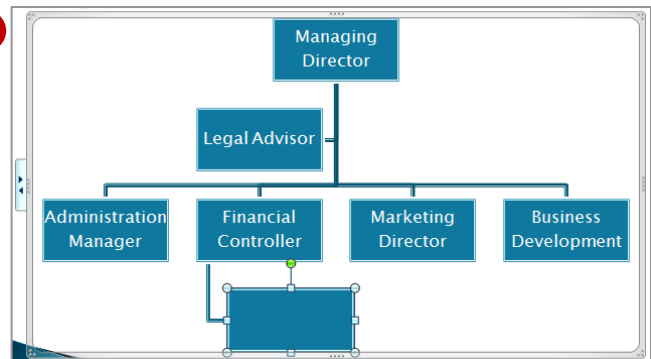
5

Type **Accountant**, then repeat step 4 to add a shape below **Accountant** titled **Projects Officer**

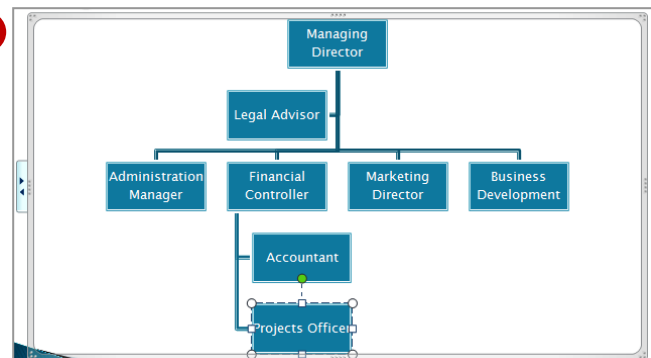
2



4



5



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 typing into the **Text** pane, which inserts the corresponding shape into the graphic. To do this, open the **Text** pane, then click at the end of the text entry of the source shape. Press **Enter** to add a shape (bullet point) below it, then press **Tab** and type the text.





ADDING SHAPES ABOVE

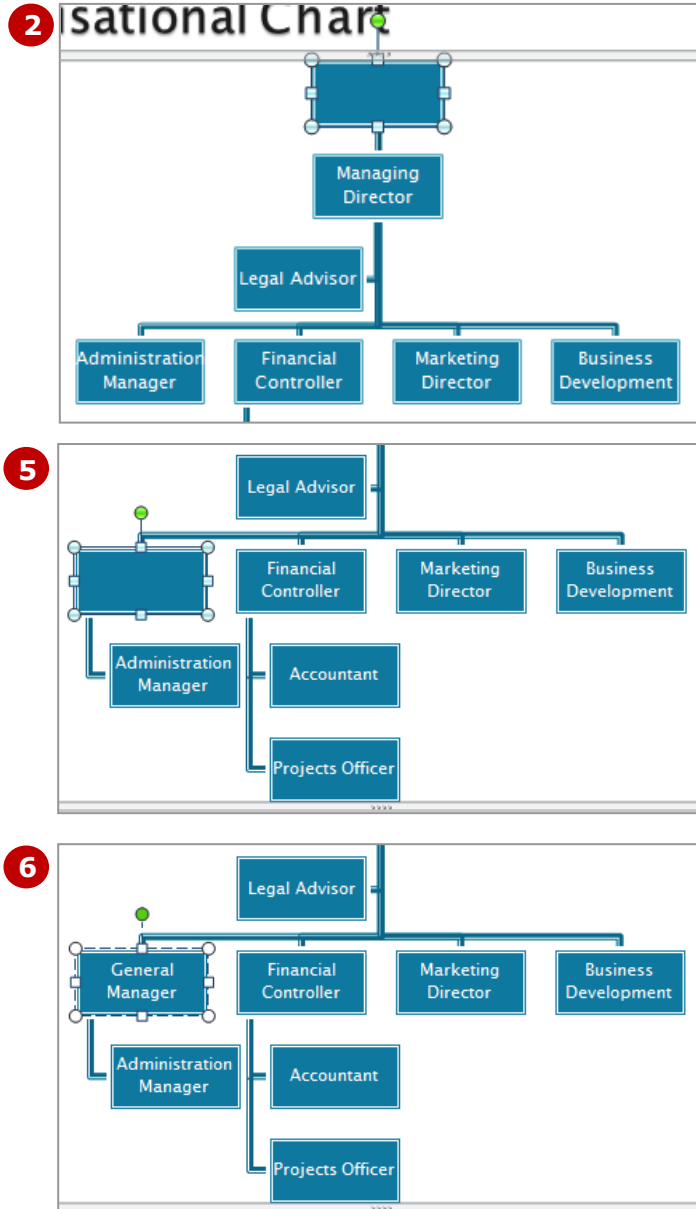
When you add a shape **above**, the shape will appear as one level above the active shape in the hierarchy. So, to add a higher position to an organisation chart, you will click on or select the **source** shape (that

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

- 1 Click on the text **Managing Director** to make the shape active
You will add the CEO to the hierarchy...
- 2 Click on the **SmartArt Tools: 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 drop arrow  for **Add Shape**  in the **Create Graphic** group and select **Add Shape Above**
- 6 Type **General Manager**



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 of the 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 P810 SmartArt_05.pptx...

1

Click on the text **Business Development** to make the shape active

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

2

Click on the **SmartArt Tools: 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

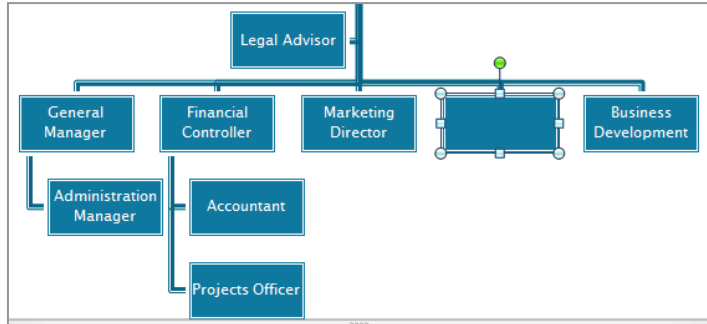
Click on the text **Administration Manager** to make the shape active
You will add **Office Manager** to the hierarchy, who also reports to the General Manager...

5

Click on the drop arrow  for **Add Shape**  in the **Create Graphic** group and select **Add Shape After**

6

Type **Office Manager**



2





5





6

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

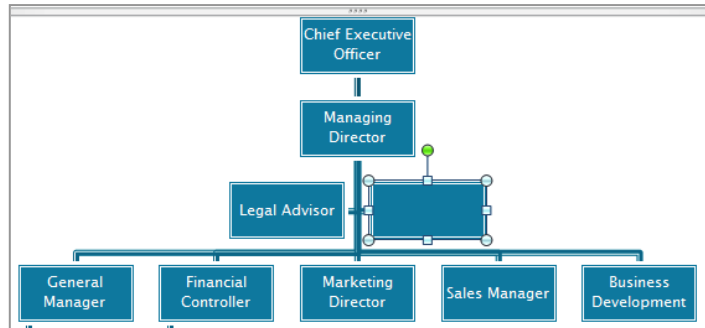
as well as other managers who report to them. For this reason, PowerPoint provides the **Add Assistant** tool to help account for these types of positions in the hierarchy.

Try This Yourself:

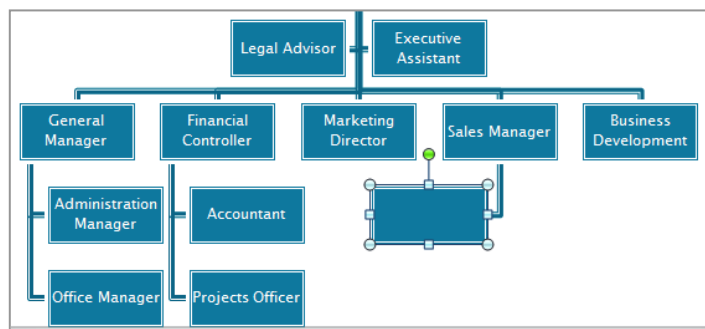
Open
File

Before starting this exercise you **MUST** open the file P810 SmartArt_06.pptx...

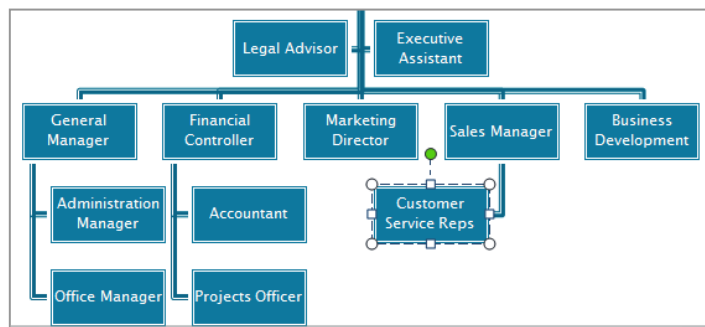
- 1 Click on the text **Managing Director** to make the shape active
You will add an Executive Assistant to the Managing Director...
- 2 Click on the **SmartArt Tools: Design** tab, then click on the drop arrow  for **Add Shape**  in the **Create Graphic** group and select **Add Assistant**
- 3 Type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



2




5



6

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 SHAPES

Microsoft PowerPoint allows you to **promote** and **demote** shapes (or positions) in the hierarchy. This can save you from having to delete and recreate positions. When you promote or demote a

shape in the hierarchy, any shapes below that shape are also promoted or demoted accordingly, and will move up or down one level in the hierarchy.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file P810 SmartArt_07.pptx...

1

Click on the text **Projects Officer**

The Projects Officer actually reports to the Accountant...

2

Click on the **SmartArt Tools: Design** tab, then click on **Demote** in the **Create Graphic** group

The connecting line changes accordingly...

3

Click on the text **Marketing Director**

The Business Development and the Sales Manager actually report to the Marketing Director...

4

Click on **Promote** in the **Create Graphic** group

This is not right at all! The reporting structure is a mess...

5

Click on **Demote** or press **Ctrl + Z** to undo the change

We will try another approach...

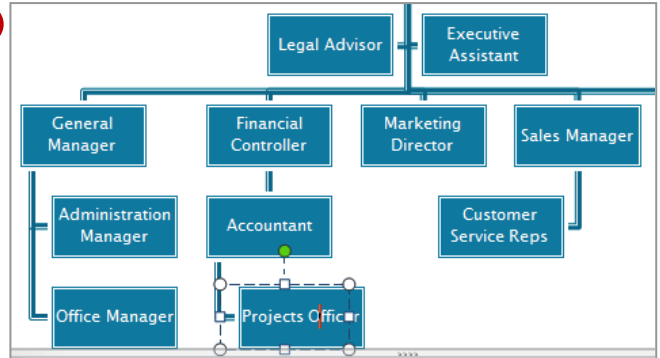
6

Click on the text **Sales Manager**, then click on **Demote** in the **Create Graphic** group

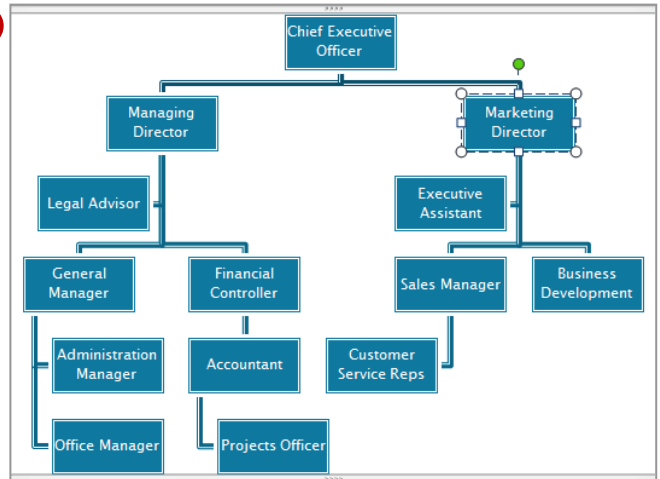
7

Repeat the above step to demote **Business Development**

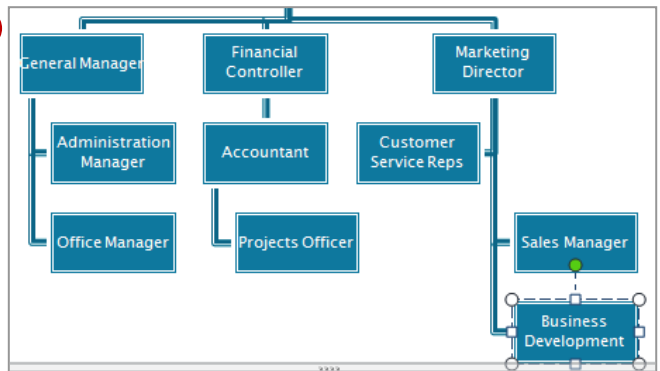
2



4



7



For Your Reference...

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

- 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.

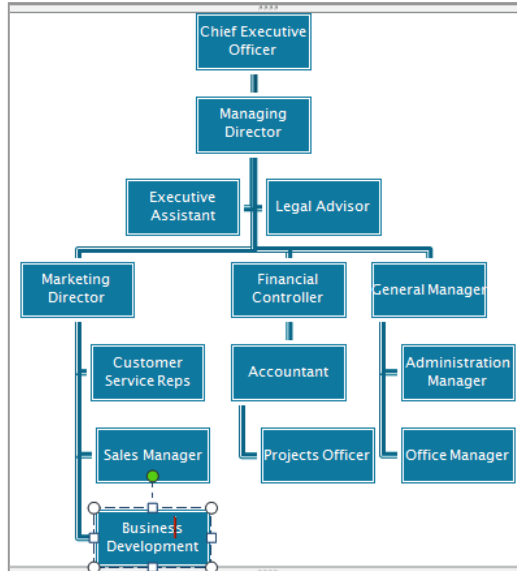
Try This Yourself:

Same
File

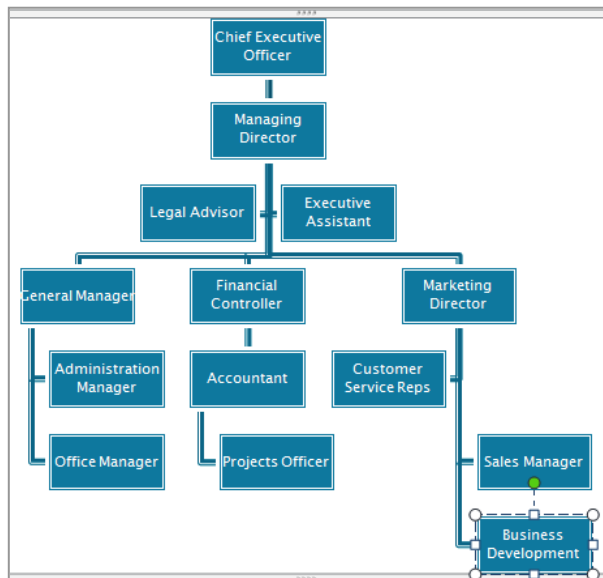
Continue using the previous file with this exercise, or open the file P810 SmartArt_08.pptx...

- 1 Click anywhere on the graphic so that the graphic placeholder appears if it is not already displayed
- 2 Click on the **SmartArt Tools: 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, then click outside the placeholder to view the result

2



4




For Your Reference...

To **switch right to left**:

1. Click on the **SmartArt** graphic to display the graphic placeholder
2. Click on the **SmartArt Tools: Design** tab, then 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.


RESIZING SMARTART

By default, **SmartArt** will resize automatically 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

- 1** Click on the **SmartArt** graphic to make it active
We really cannot make the graphic wider, but we'll increase the height by dragging on a placeholder border...
- 2** Move the pointer over the placeholder handle that appears along the middle of the bottom placeholder border so that a double-headed arrow appears, as shown
- 3** Click and drag down slightly, as shown
- 4** Release the mouse button
The graphic is resized. You will use the controls on the Format tab to resize the height more precisely...
- 5** Click on the **SmartArt Tools: Format** tab, then click on the up arrow  for **Height** in the **Size** group until the **height** is **14 cm**




5

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 **SmartArt Tools: Format** tab, then specify the required **Height** and **Width** in the **Size** group

Handy to Know...

- Press **Ctrl** while dragging on a placeholder handle to resize from all four sides at once.
- You may need to reposition the graphic once resized. To position SmartArt, click in the graphic, then click on **Align**  on the **SmartArt Tools: Format** tab and select an option.


CHANGING THE SMARTART LAYOUT

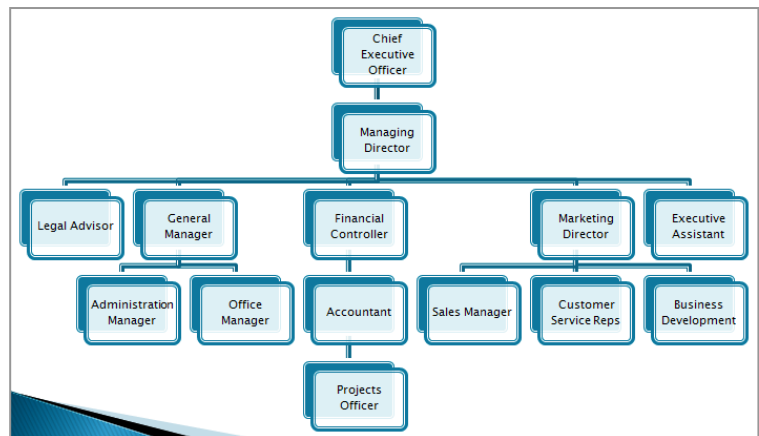
Each **SmartArt category** in the **SmartArt** gallery contains a range of **layouts** that you insert to create your diagrams. But if you're not happy with the layout you can easily apply a different layout to your

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

- 1 Click on the **SmartArt** graphic to display the graphic placeholder and make it active
- 2 Click on the **SmartArt Tools: 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




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

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

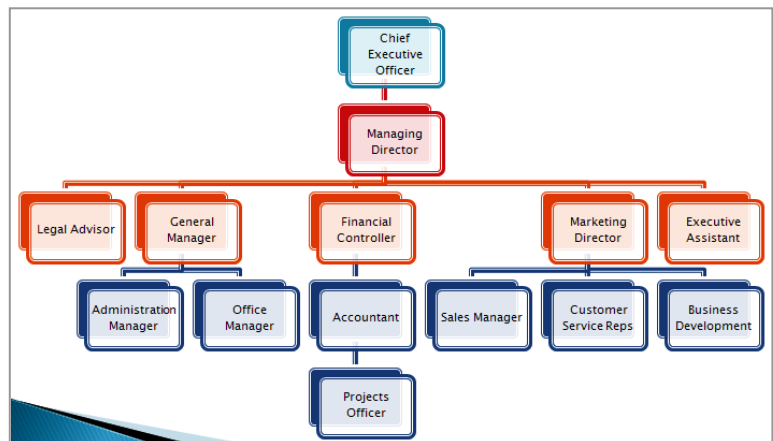
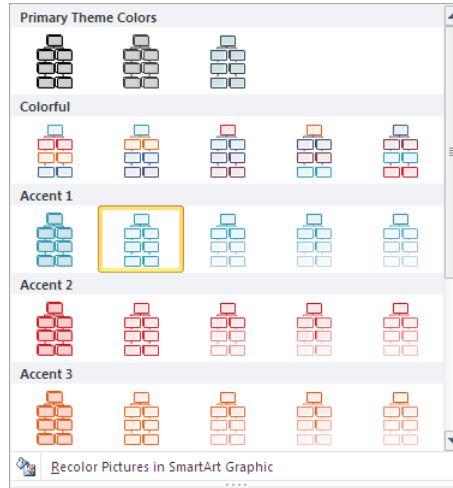
the graphic conforms to the formatting requirements of the presentation.

Try This Yourself:

Same
File

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


2



4

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** and **Home** tabs and apply formatting as required.


APPLYING A SMARTART STYLE

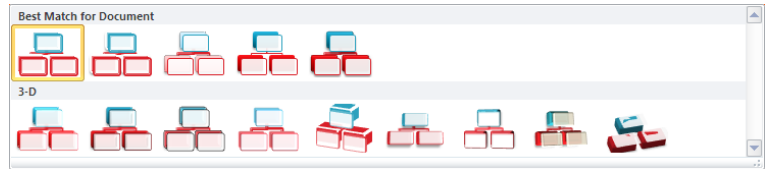
You can also apply **styles** to your SmartArt. **Styles** differ to layouts in that they include a range of effects for shapes, such as 3D effects, thereby enhancing the

look of your graphic.

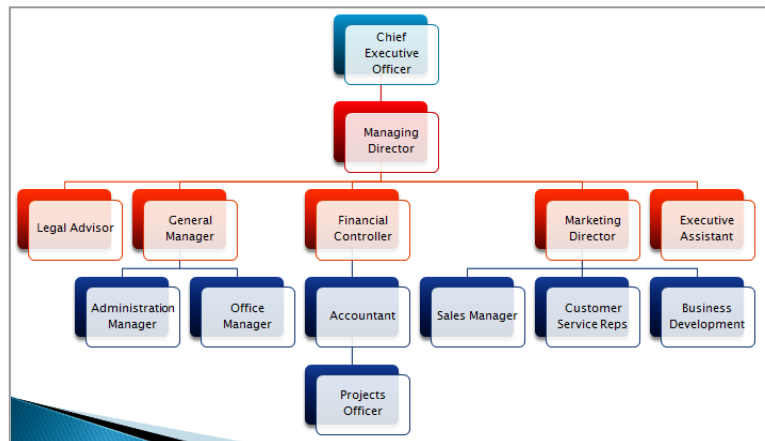
Try This Yourself:

Same
File

- 1 Click on the **SmartArt** graphic to display the graphic placeholder and make it active
- 2 Click on the **SmartArt Tools: 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 **Moderate Effect** to apply this style, then click outside the placeholder to view the result
- 5 Save the presentation




2




4

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

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.

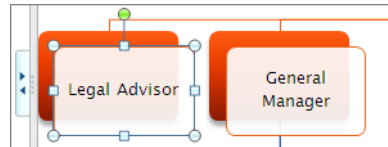
Try This Yourself:

Same
File

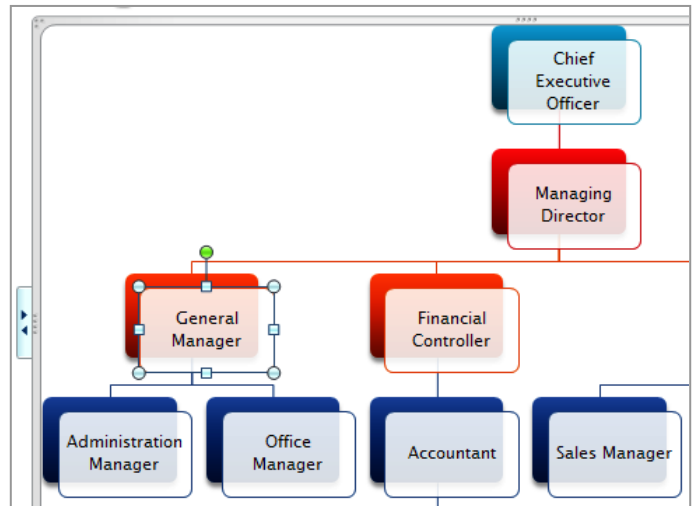
Continue using the previous file with this exercise, or open the file P810 SmartArt_13.pptx...

- 1 Click on the text **Legal Advisor** to activate the shape, then click on the border of the shape to select it, as shown
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 Repeat step 1 to select the shape titled **Office Manager**
- 4 Press **Del**
You will now edit some of the 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 presentation

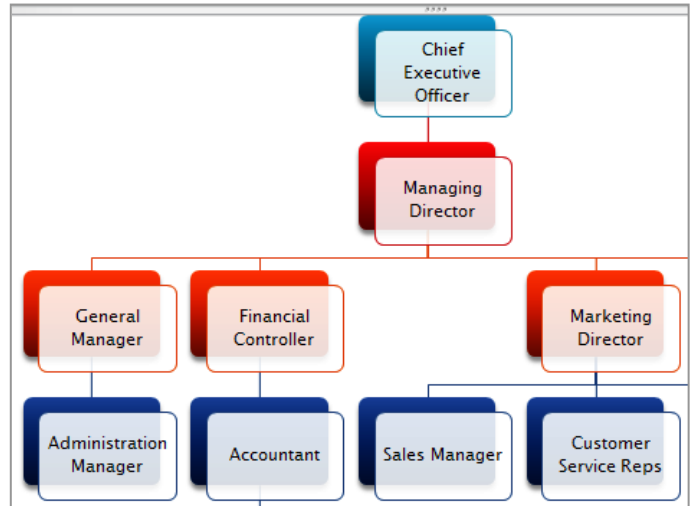
1



2



4



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, click on the placeholder border to make sure no shapes are selected, then press **Del**.

CONCLUDING REMARKS

Congratulations!

You have now completed the **SmartArt** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as outlined in the task list on page 2.

We have tried to build up your skills and knowledge by having you work through specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.
- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet
- read computer magazines - there are often useful articles about specific techniques
- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt
- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others
- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way
- and of course, there are also more courses and booklets for you to work through
- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**