

Create and work with SmartArt graphics


Get a taste of creating SmartArt graphics — convert, create, edit, and swap.

Before you begin

During the practice, this window will stay on top of the program you are working in. When it covers an area you need to use, move and resize it as follows:

- ↓ To move this window, click the title bar of the window (as shown below) and drag it to a new location:



- ↓ To resize this window, drag the resize handle  in the lower-right corner.

Recommendation Print out these instructions so that you see them on paper as you work. Some of the exercises below involve features that have galleries or panes that can partially cover up the online instructions. You could also adapt to this by making the PowerPoint window smaller as well as the window that contains instructions.

Exercise 1: Convert a list to a SmartArt graphic

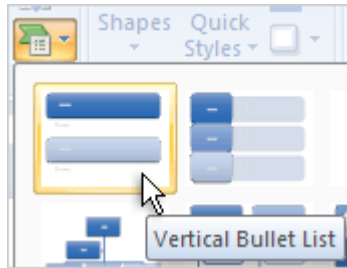
See how a SmartArt graphic might enhance the items in a bulleted list.

1. Click the slide 2 thumbnail. It's an Executive Summary, with some broad first-level and second-level bullet points. You'd like to kick off the presentation with these points and get people's attention.
2. See if one of the SmartArt graphics works well with this text. First, click anywhere in the list on the slide.

3. On the **Home** tab, in the **Paragraph** group, click **Convert to SmartArt Graphic** .


A gallery appears with layout candidates for a list.

4. Point to the first layout in the gallery, which looks like this:



It's called **Vertical Bullet List** (the name shows in the ScreenTip that appears). The layout is previewed on the slide, adapting your list's contents to the layout format.

In this layout, the first-level text goes in filled shapes that are separate from the second-level items. It sets the main points off just a bit more.

5. Look at these other layouts (watch for the ScreenTip as you point and get a preview. If you happen to click the layout, it will be applied; click **Undo**  on the Quick Access Toolbar, or press CTRL+Z, to revert the content to a list):

Vertical Block List:



Vertical Picture Accent List (the circles on this layout become placeholders for pictures when you apply the layout):

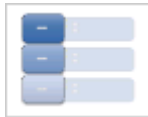


Target List:



Each of these seems like a good possibility for the list's content. (Don't worry if the graphic looks incomplete in the preview, you'll work more on its content in these exercises.)

6. Go back to **Vertical Block List**



and click it to apply it. This layout pulls main points to the side of second-level points, breaking them out of the line-after-line look.

Your list is now a SmartArt graphic.

Tips about converting If you convert a list to a graphic, and then you want the list back, you must use **Undo**. If too many steps have happened and you can no longer undo, you could display the Text pane for the graphic (next exercise shows you how to display the pane), copy the text from there, and paste it onto a new slide. Another tactic is to copy the slide with your list before you convert it; then you have a backup.

Exercise 2: Add more text

You'll add text to the graphic now, both by using the Text pane and by typing directly into shapes.

1. On slide 2: If the Text pane isn't open on the side of the graphic, open it by clicking the narrow vertical strip with arrows that's on the graphic's left side (the graphic must be selected):



2. The first-level bulleted text in the Text pane represents the main shapes (the ones on the left) in the graphic.

The second-level text in the Text pane appears in the shapes that are to the right of the main shapes. These are longer, with more room for text.

3. In the Text pane, place the cursor at the end of the second-level text, "Just-in-time retail inventory," just under "The Concept." Press ENTER.

A new second-level bullet appears in the Text pane.

4. For the new bullet, type **Expanded range of choices**.

As you type, the text appears in the related shape in the graphic, too, and the bullet is added there automatically.

5. Now add text directly to shapes in the graphic. On the slide, double-click the text in the last, second-level shape, which says "Unlimited"; the text is selected. Type **20% growth in this fiscal year**, replacing the selected text.

In the Text pane, the text appears in the relative position, under "The Potential."

6. In the shape where you just typed, press ENTER.

You get another second-level bullet in the shape and in the Text pane.

7. At this bullet, type **The Gains**.

This text, though, really should be one of the main shapes, a first-level bullet. How do you put it in that position, in a new shape?

Do the next steps to find out.

Exercise 3: Promote text and add a shape

You can promote (move text or a shape into a higher position) the last text bullet so that it becomes first-level text, and you can add a main shape for it in the process.

1. Place the cursor in the Text pane, in the text "The Gains." To promote this text, press SHIFT+TAB.

The text is promoted to a first-level bullet, at the bottom; and in the graphic, you get a new main shape with the text "The Gains" in it. Note that no second-level shape appears with it.

2. There are a couple of easy ways to get the second-level shape. Either:

- Place your cursor at the end of the "The Gains" in the Text pane, press ENTER, and then press TAB.

This moves the new first-level bullet you created when you pressed ENTER into a second-level position, and gives you the second-level shape in the graphic, too.

OR:

- Place your cursor at the end of the "The Gains" in the Text pane. Then, under **SmartArt Tools**, on the **Design** tab, click the **Add Bullet** button. It's at the far left, in the **Create Graphic** group.

SmartArt Tools are available on the Ribbon whenever the graphic on the slide is selected. There are also **Promote** and **Demote** buttons on the Ribbon.

When you click **Add Bullet**, the second-level bullet is added just where it should be, as a second-level bullet under "The Gains"; and the second-level shape is added to the graphic, too, next to "The Gains."

This is an example of how you can accomplish similar results by either working within the Text pane or using commands on the Ribbon.

3. In the Text pane at the new bullet you added, or in the graphic within the second-level shape you added, type this text: **Astronomical**. Whether you type from the Text pane or within the shape, a new bullet is automatically added to the shape, along with the text.

4. To close the Text pane, click the **Close** button in its upper right corner.

Exercise 4: Insert a blank graphic

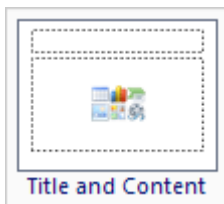
Try a slightly different scenario. Imagine that as part of your business strategy, you need to show a product timetable. Insert a SmartArt graphic that will give a timeline and the right shapes for your text.

1. Click under slide 4. On the **Home** tab, in **Slides**, click the arrow next to **New Slide**.



A gallery of slide layouts is displayed.

2. Click the second one, called **Title and Content**.



The new slide, slide 5, contains a group of icons that you use to insert a table, chart, SmartArt graphic, clip art, picture file, or movie file into the placeholder. You can also type text in the placeholder.

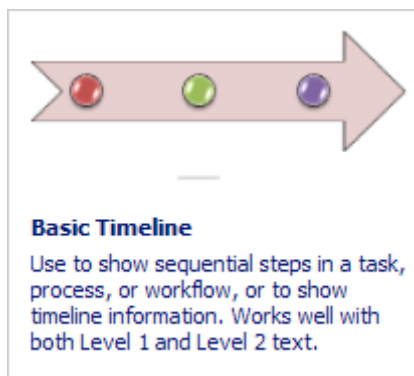
3. On the slide, in the title placeholder, type **Product Timetable 2008**.
4. On the slide, click the SmartArt graphic icon within the icon group:



The **Choose a SmartArt Graphic** dialog box opens. It contains all the layouts that are available.

5. Narrow down your choices here to what will work best for a timeline. Within the types shown in the left of the window, click **Process**; this type contains layouts that support sequences.
6. This window behaves differently from the earlier gallery you got when you converted your list text.

To see how, click any layout in the gallery. On the right in the window, a larger example of the layout is shown with a description underneath. Here's an example:



While you can't preview the layout from this dialog box, this picture and description give you some indication of whether it's what you want. In any case, it's easy to replace whatever you choose here.

Note The finished layouts in this window, which show above the descriptions, appear with a different style and colors applied from the one you see in the small layout thumbnails. In any case, when you apply the layout, it will get the design of the current presentation **theme** that's applied. We'll go more into themes in the next lesson. You'll also see how to change the style and colors for the graphic.

7. In the gallery, find the layout called **Alternating Flow**, near the top:



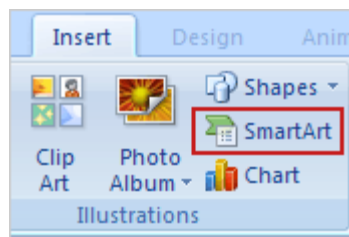
Click it to see a larger version of it and read a description. It looks like it will support timeline information. Click **OK**.

The graphic is now on your slide and awaits your content.

Exercise 5: Use the Insert tab

Before filling in the graphic, have a glance at the other method for inserting a SmartArt graphic.

1. Click the **Insert** tab.
2. Click **SmartArt** in the **Illustrations** group.



Note The way this button looks might vary a little depending on how big you've made your PowerPoint window.

This opens the **Choose a SmartArt Graphic** dialog box — the same dialog box that you've just been working in. The main difference between using the **Insert** tab and using an icon within the slide layout to insert the graphic is that, in the latter method, the graphic always gets put into the placeholder you inserted from.

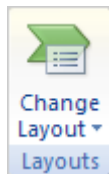
However, when you use the **Insert** tab method, PowerPoint will guess on which placeholder you want the graphic in, and typically put it where you expect.

3. In the **Choose a SmartArt Graphic** dialog box, click **Cancel**.

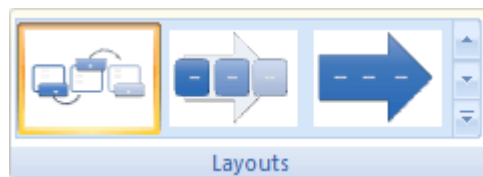
Exercise 6: Swap the layout

See how you'd replace this layout with another one.

1. With the graphic still selected on slide 5, click the **Design** tab on the Ribbon, under **SmartArt Tools**.
2. Look for the group called **Layouts**. Depending on the size of your PowerPoint window, it will look either like this:



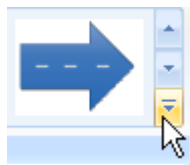
or like this:



In the larger version, the layout you applied is displayed there as a thumbnail, and highlighted.

3. If you have the smaller version of the **Layouts** group, click **Change Layout**. In the gallery, click any one of the layouts there to apply it to the current graphic.

If you have the larger version of the **Layouts** group, click the **More** arrow, as shown below, to see the gallery, and click one of the layouts to apply it:



Your earlier layout is replaced.

4. But you decide you want the layout you had. Easiest thing to do now is click **Undo** (Quick Access Toolbar, upper left, above the Ribbon) until you get the **Alternating Flow** layout back. Or, open the **Layouts** gallery again and reapply the **Alternating Flow** layout.

Exercise 7: Pick your method for adding text and working with shapes

You may have a preference for how you add text and work with shapes in the graphic — either through the Text pane or by working directly with the graphic's shapes. In this exercise, both methods are given; follow the one you prefer. Of course, you don't have to stick with one and can mix up methods as much as you want.

If you want to do the steps for both methods here, copy slide 5 before you start the next steps for working in the Text pane. Then use the copy, slide 6, to do the same thing while working directly with shapes. (To copy, right-click the slide 5 thumbnail and click **Duplicate Slide** on the shortcut menu.)

Method 1: Work from the Text pane

1. Select the slide 5 thumbnail.
2. If the Text pane isn't open next to the SmartArt graphic, select the graphic. Then click the set of small arrows, on the left, to open it.
3. In the Text pane, for the first-level bullets, type **January, July** , and **December**. To navigate you can press the DOWN ARROW key to get to the correct bullet in the Text pane, or just click next to the bullet you want.

The main-level text appears in the smaller rectangular shapes that have arrows coming out of them in the graphic.

4. You decide that you need to add another primary milestone. In the Text pane, click in front of the word "July." Type **April**, and press ENTER.

"April" is a new first-level bullet in the Text pane, and new shapes, a main one and a subordinate one, are added in the graphic, along with your text.



The shapes automatically get an arrow pointing to the next shapes.

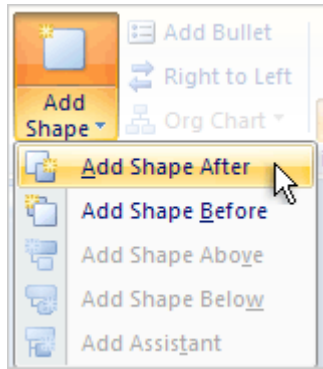
5. Add second-level bullets now. In the Text pane, place your cursor at the end of "April." Press ENTER, and then press TAB.

The bullet is indented. In the Text pane, type **Phase 3**, press ENTER, and type **Phase 4**. Text goes into the appropriate shape in the graphic.

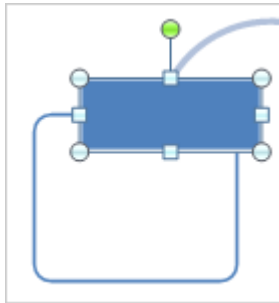
Method 2: Work from the graphic

(If you're trying both methods, now switch to slide 6, and click the **Close** box in the Text pane to close it. If you're only doing this method, select slide 5.)

1. In the main shapes (the smaller, rectangular ones with the arrows coming out of them), type **January**, **July**, and **December**, one month per shape. Click the shape to select it and then type.
2. You need to add another milestone, which should follow **January**. Click the **January** shape.
3. Under **SmartArt Tools** on the Ribbon, click the **Design** tab.
4. In the **Create Graphic** group on the left, click the arrow next to **Add Shape**. On the menu, click **Add Shape After**.



You get a new set of shapes following the **January** shapes. An arrow is part of the shapes.



5. Type **April** in the new main shape.
6. You can add the bulleted items in the second-level shape a couple of different ways:
 - Click in the second-level shape and start typing: **Phase 3**. A bullet is added automatically with your text, and a bullet and text also get added in the Text pane.

OR:

- On the **Design** tab under **SmartArt Tools**, click **Add Bullet**, and type **Phase 3**.

To get the second bullet, press ENTER, and type **Phase 4**. Or, click **Add Bullet** again, on the Ribbon.

More tips See the Quick Reference Card at the end of the course for additional tips about working from the Text pane or within the SmartArt graphic itself to make changes.